

Dashboards

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Creating a dashboard

You can easily create new dashboards in Cloudera Data Visualization.

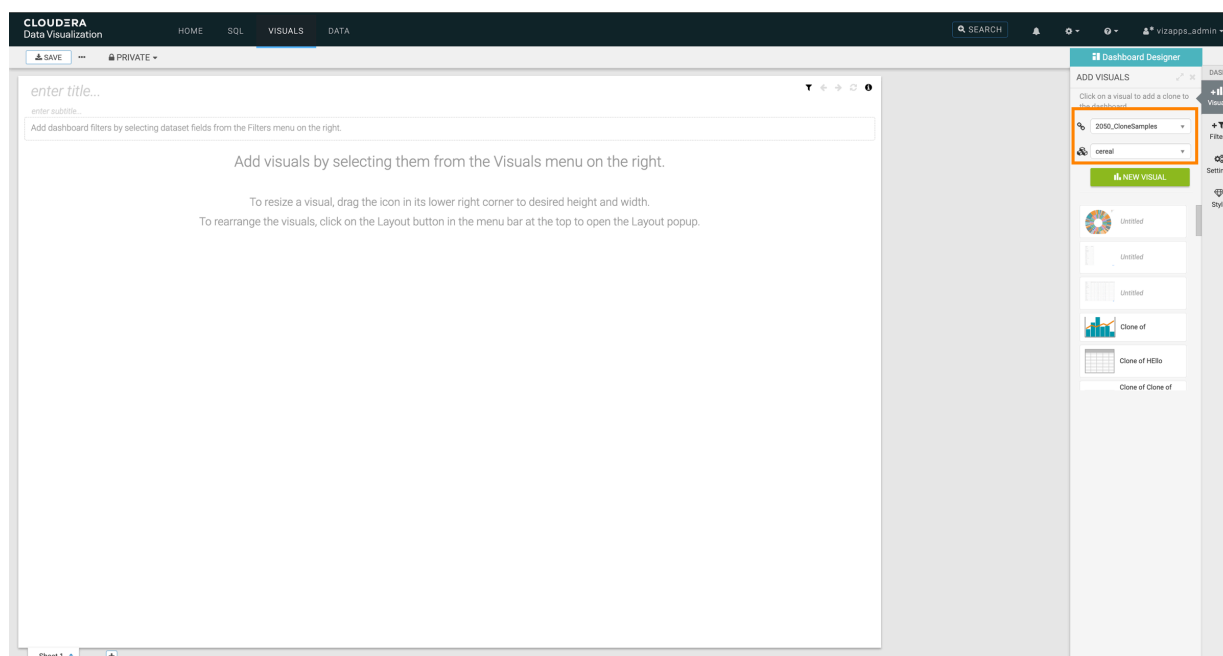
Procedure

1. There are several possible starting points for creating a new dashboard:
 - Click NEW DASHBOARD in the top right corner of the main HOME interface.
 - Click Create New Dashboard in the top right corner of the preview area in the VISUALS interface.
 - Click the  icon next to the name of a particular dataset on the DATA interface.
 - Click NEW DASHBOARD in the top right corner of the Dataset Detail view for a particular dataset.

The Dashboard Designer opens and displays an untitled dashboard. See the *Dashboard Designer* documentation to familiarize yourself with the interface.

2. Change the connection and/or dataset.

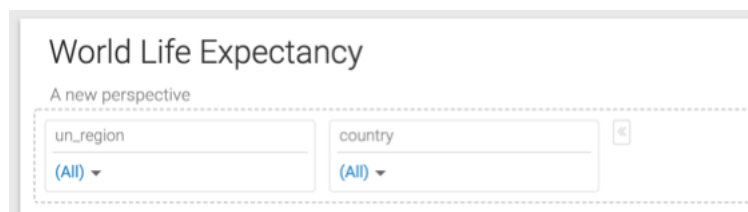
The dashboard is automatically connected to the parent connection and dataset, but you can add visuals and filters based on other connections and datasets.



3. Add a title for the dashboard.

Optionally, you can also add a subtitle.

In this example, World Life Expectancy and A new perspective are used as title and subtitle.



4. You can also customize settings, styles, and create custom styles for the dashboard.

5. In the VISUALS menu, select an existing visual you want to add to the dashboard, either from Recently Viewed Visuals, or from the listed visuals of this dataset. Alternatively, you can create a new visual by clicking NEW VISUAL.
6. Click SAVE to save the dashboard.
7. Click VIEW to preview the dashboard at runtime.

Related Information

[Dashboard Designer](#)

Customizing dashboard layout

When you have a dashboard with multiple visuals, you might need to resize and reorganize the visuals on the dashboard to make it work better for your users. In Cloudera Data Visualization, you can easily change the layout of a dashboard.

About this task

By default, visuals are positioned sequentially, aligning with the order in which you added them to the dashboard. You can reorganize the layout by resizing or moving around the individual widgets on the dashboard.

Procedure

1. Open the dashboard you wish to modify in Edit mode.
2. On the Dashboard Designer top menu bar, click LAYOUT.

The Layout of Dashboard Visuals modal window is displayed.

In the modal window there are widgets that provide the following information about visuals:

- Top left color squares represent the datasets associated with the visuals.
- The title of each visual is displayed at the top of its corresponding widget.



Note: If the widget is too small, the title may not be fully visible.

- Visual snapshots appear as thumbnails making it easy to identify the individual visuals on the dashboard.



Note: If a visual has been modified but not saved, the thumbnail displayed maybe be outdated or unavailable. When a thumbnail is unavailable, an icon representing the visual type is used instead.

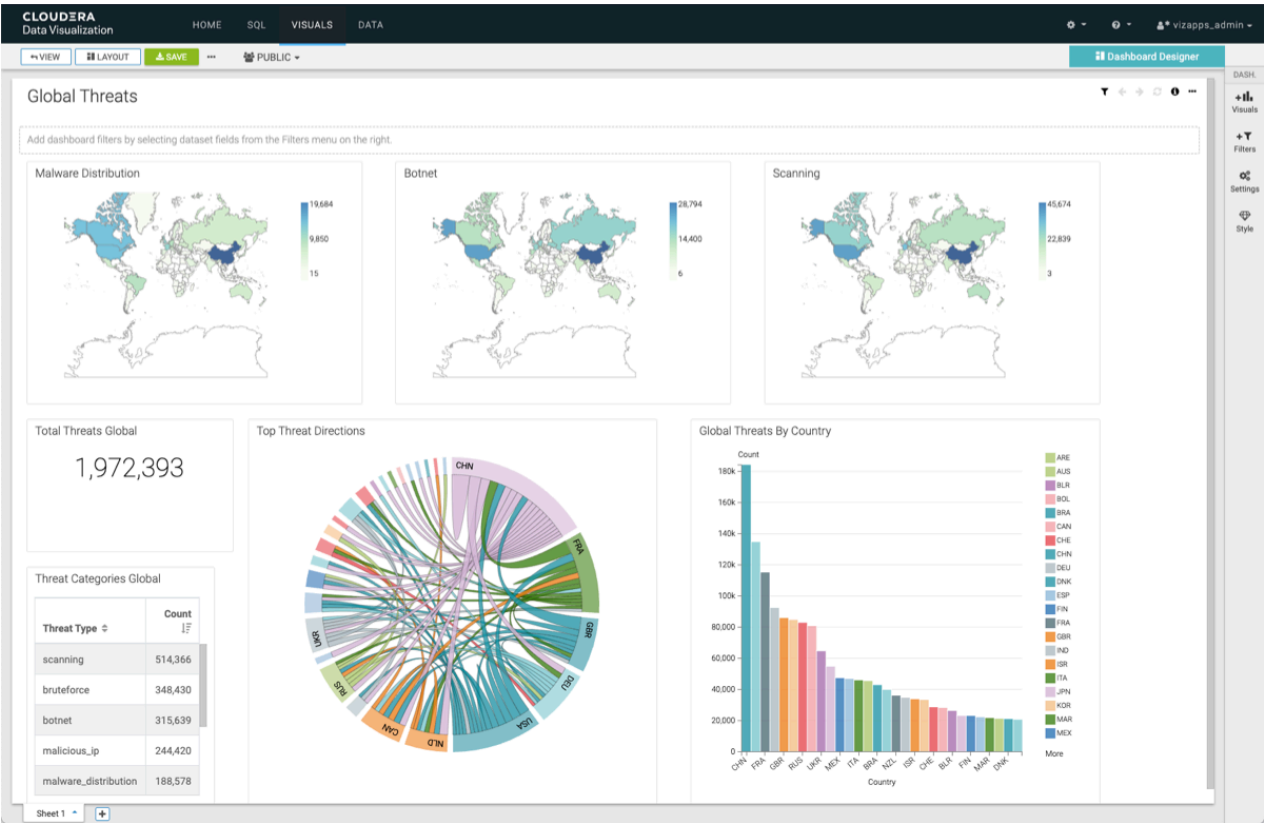
3. To reorganize visuals on the canvas, click and drag the widgets to the desired positions.
4. To resize a widget, click and drag its bottom-right corner and set the desired dimensions.
5. Once you have achieved the desired layout, click APPLY LAYOUT.

Results

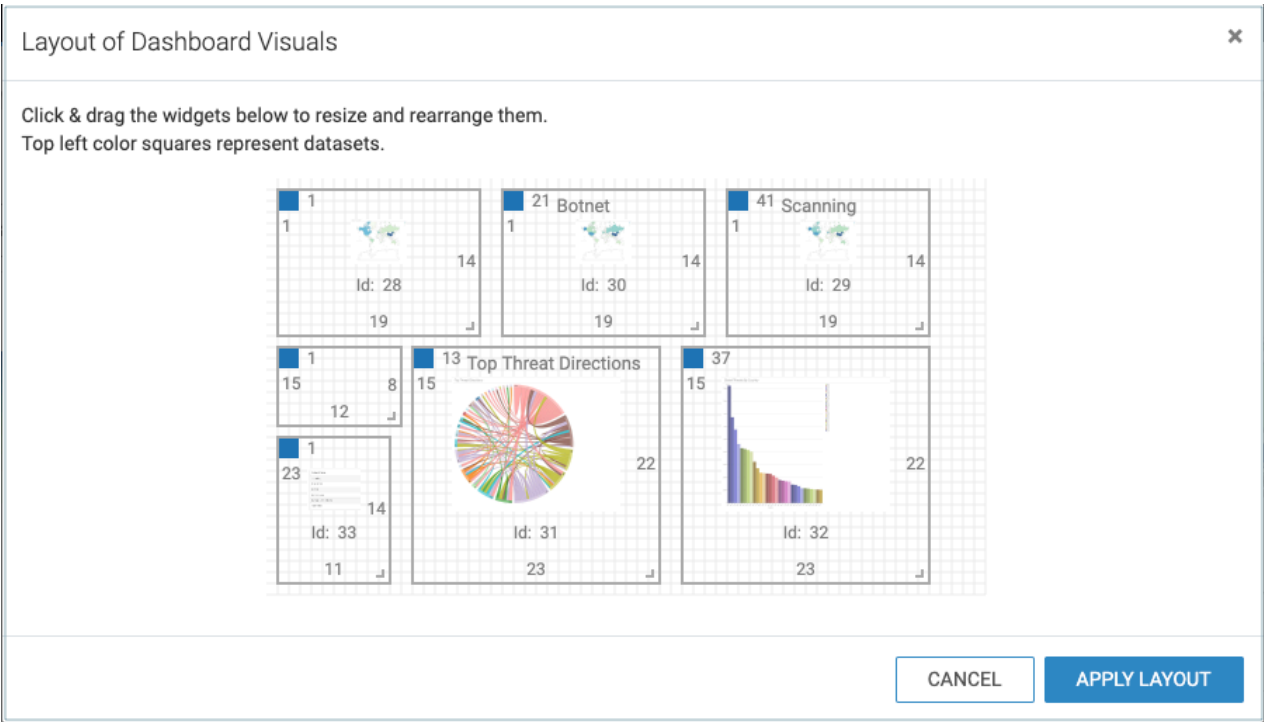
The dashboard layout is updated.

Example

In this example, you can see how the dashboard layout changes after rearranging the widgets on the layout modal. This is the original dashboard, showing the arrangement of visuals the way it was initially designed:



This is the layout modal of the original dashboard:



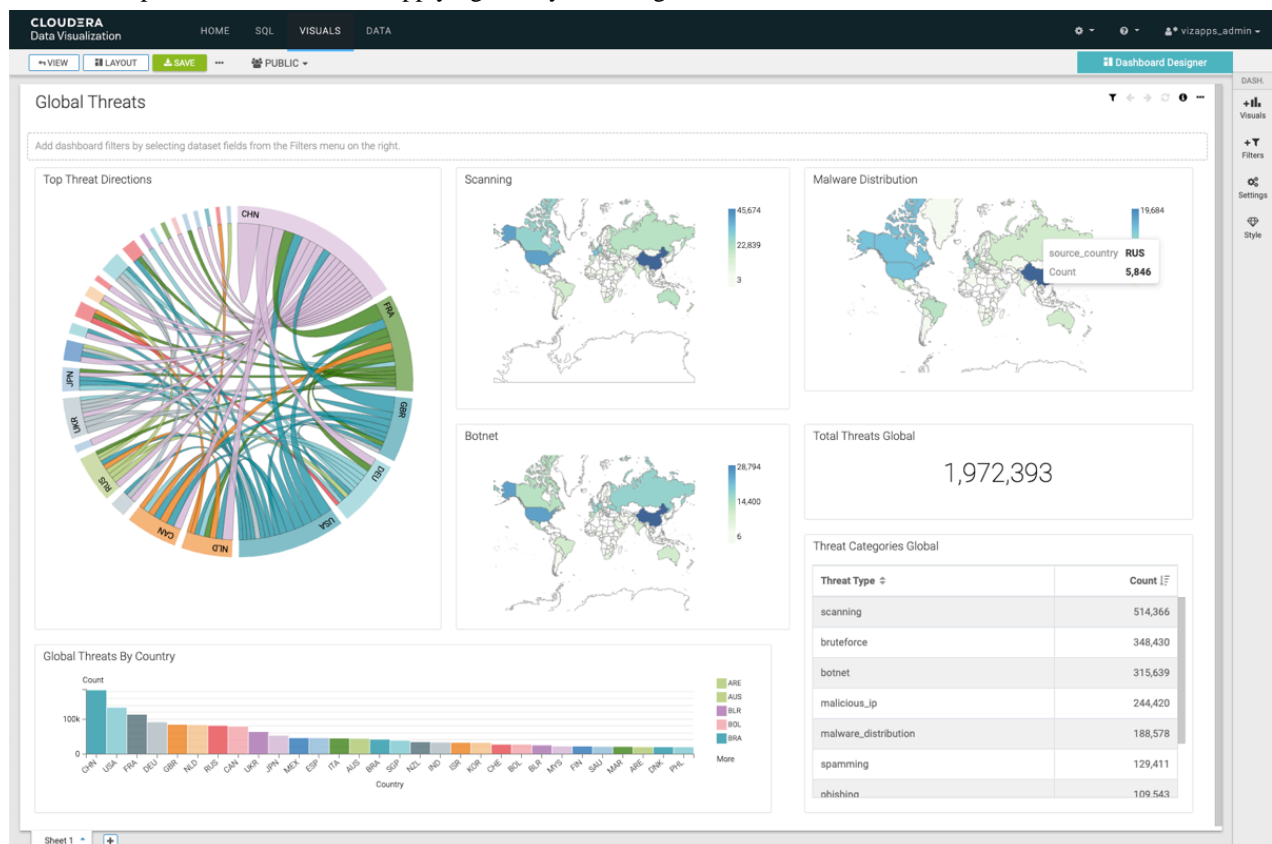
This is the new dashboard layout after rearranging and resizing the widgets representing the visuals in the dashboard:

Layout of Dashboard Visuals

Click & drag the widgets below to resize and rearrange them.
Top left color squares represent datasets.

CANCEL APPLY LAYOUT

This is the updated dashboard after applying the layout changes:



Opening a dashboard

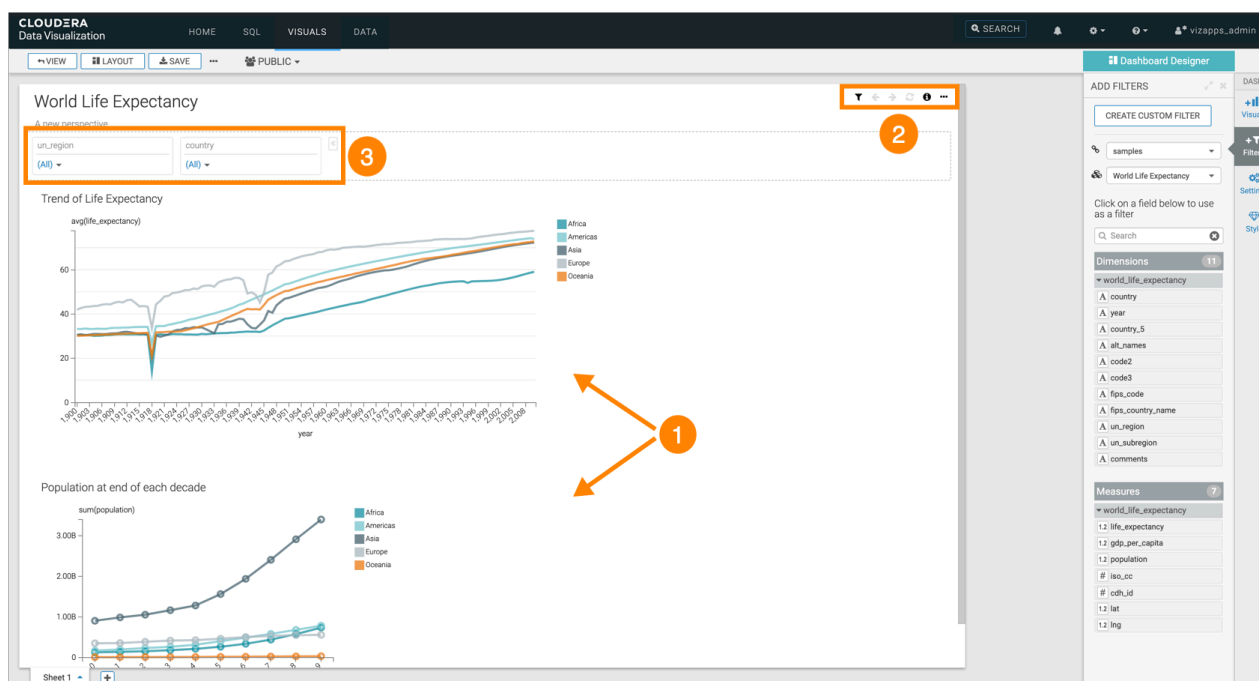
A Cloudera Data Visualization dashboard is a collection of multiple visuals. You can access existing dashboards on the VISUALS interface and open them in either View or Edit mode. If a dashboard is loading slowly, a notification is displayed. This data load message provides a link to the Profile Data modal for more information on the requests and operations in progress.

View mode

View View mode provides a read-only view of a dashboard and its visuals. Despite being read-only, this mode is dynamic and responsive, which is primarily achieved by filters and dashboard controls.

If you open a dashboard in View mode, you can access the following within the dashboard preview area:

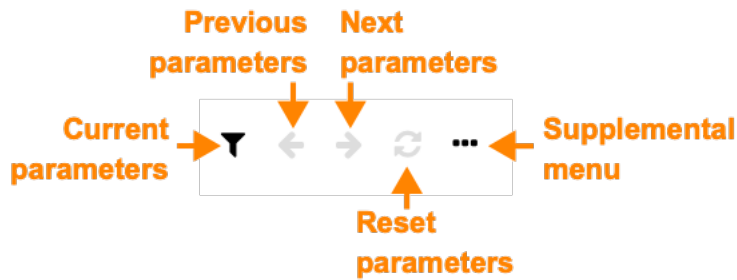
1. Visuals displayed on the dashboard
2. Dashboard controls
3. Filters (if added)



Dashboard controls

Cloudera Data Visualization offers a set of dashboard controls in View mode, some of which have keyboard shortcuts available.

- **Current Parameters:** Shows the current values of dashboard-level filters.
- **Previous Parameters (left arrow icon):** Navigates backward through filter settings, resetting the filter values to the previous state. Keyboard shortcut: Ctrl/Cmd + B.
- **Next Parameters (right arrow icon):** Navigates forward through filter settings, advancing the dashboard to the next state (if available). Keyboard shortcut: Ctrl/Cmd + F.
- **Reset Parameters (refresh icon):** Resets the dashboard to its initial state with the original filter values. To change these initial values, you must edit the dashboard and save the changes. Keyboard shortcut: Ctrl/Cmd + R.
- **Supplemental Menu:** Provides options to email the current sheet, or to get the full dashboard URL so you can copy it, share it, or create an alias for it.



Edit mode

Edit mode is accessible to the dashboard owner and all users who have been granted access permissions. It allows you to edit the dashboard, including editing existing visuals and adding new ones to the dashboard.

To edit an existing dashboard:

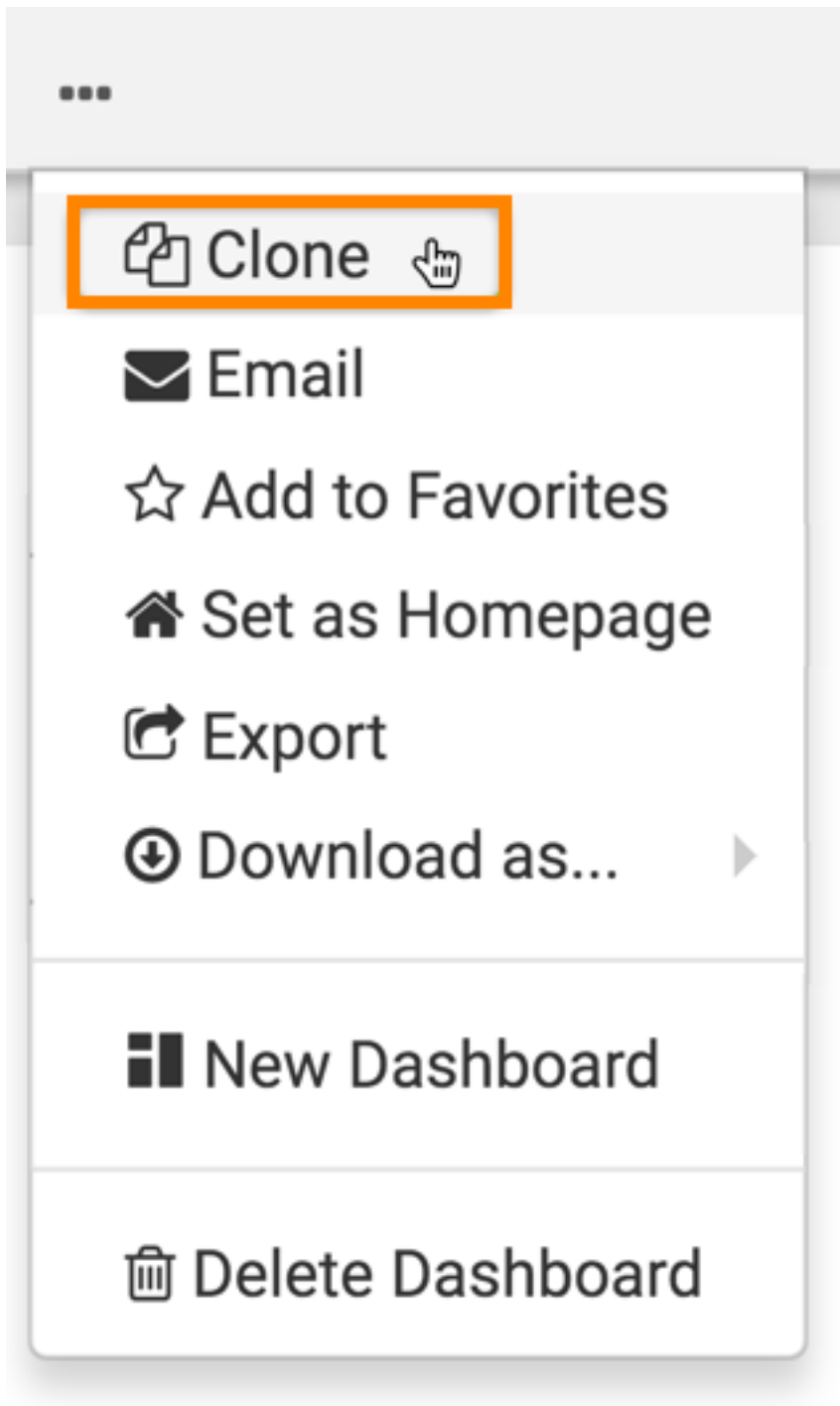
- Open it in View mode and click EDIT in the top-left corner.
- On the VISUALS interface, hover over the dashboard tile and click the (pencil) icon in the bottom-right corner.

Cloning a dashboard

In Cloudera Data Visualization, you can create an identical dashboard that you may choose to customize or move to another workspace.

Procedure

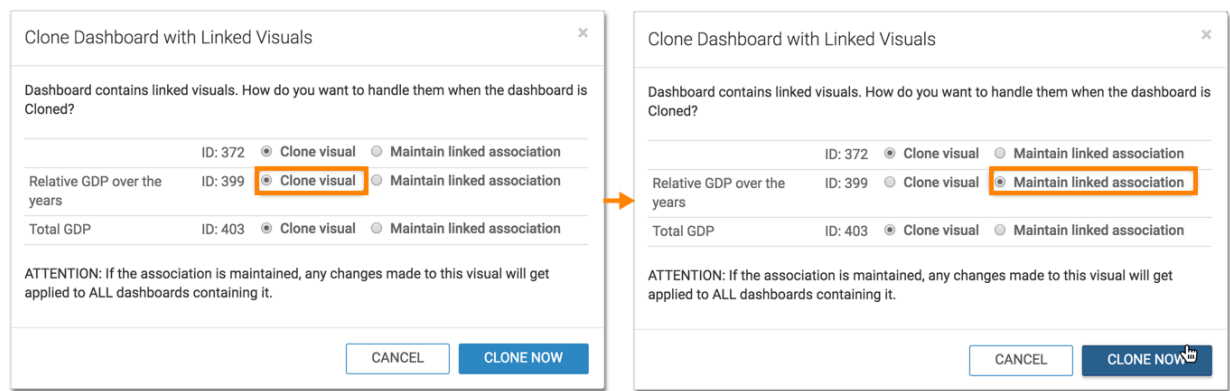
1. In the Dashboard Designer top menu bar, click the (ellipsis) icon and select Clone.



Note: Unsaved changes on the parent dashboard are persisted when cloning the dashboard.

If the dashboard contains linked visuals, the Clone Dashboard with Linked Visuals modal window appears.

2. By default, Cloudera Data Visualization clones all visuals, both linked and dashboard-specific. However, you can choose the Maintain linked association option for any of the linked visuals, and click CLONE NOW.



Adding a dashboard to favorites

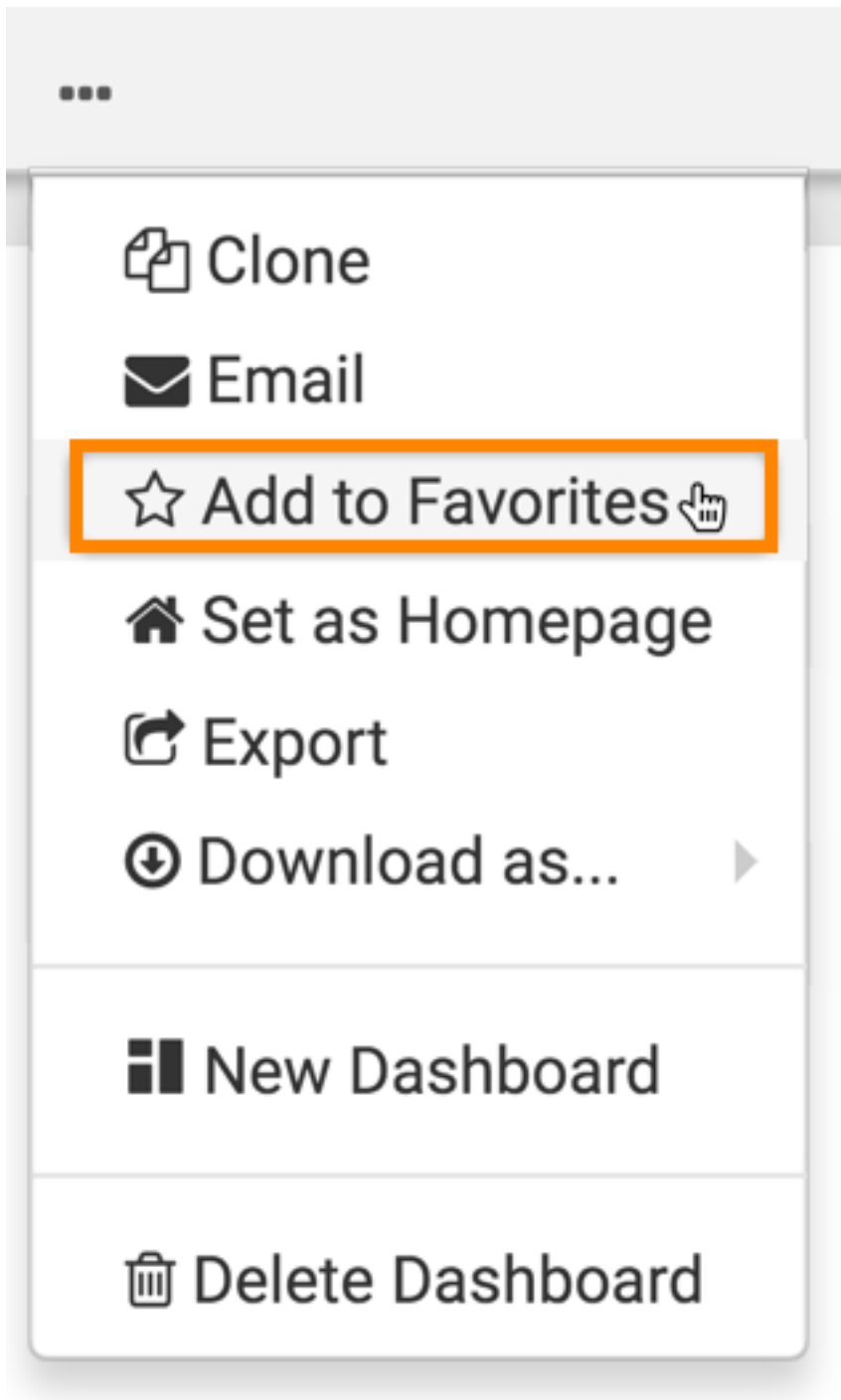
In Cloudera Data Visualization, you can mark your frequently used dashboards as favorites. These bookmarks make it easy to find your most-used content in a subsequent work session

About this task

When you mark a dashboard as favorite, you can access it quickly from the My Favorites list. Favorites are also visible on the HOME view.

Procedure

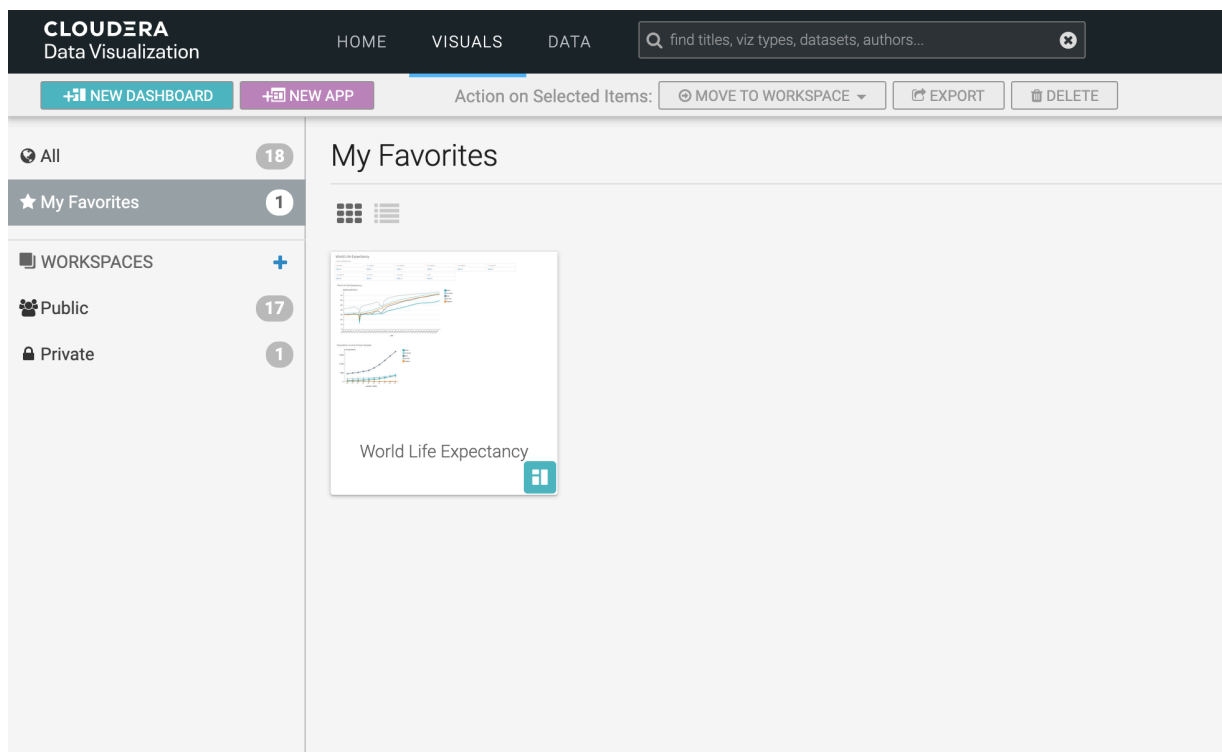
1. In the Dashboard Designer top menu bar, click the (ellipsis) icon, and select Add to Favorites.



A Success message appears.

You can now find this visual in the Favorites list. All dashboards marked as favorite appear in the interface.

2. To view your favorite dashboards, click VISUALS on the main navigation bar and click My Favorites in the side menu bar.



3. If you no longer use a dashboard as often as before, you can unfavorite it.

When you unfavorite content, it is removed from your My Favorites list but not from CDV.

Favorites is a toggle setting. In the Dashboard Designer top menu bar, click the (ellipsis) icon and select Remove from Favorites.

Setting a dashboard as your homepage

In Cloudera Data Visualization, you can change the home screen to the currently viewed or edited dashboard.

Before you begin

You need edit privileges to perform this task.

Procedure

1. Click the supplemental menu in the top menu bar and select Set as Homepage.

The screenshot shows the Cloudera Data Visualization interface. The top navigation bar includes 'HOME', 'SQL', 'VISUALS', and 'DATA'. Below the navigation bar, there is a supplemental menu with options: 'Clone', 'Email', 'Add to Favorites', 'Set as Homepage' (highlighted with an orange box), 'Export', 'Download as...', 'Show Usage Info', 'New Dashboard', and 'Delete Dashboard'. The main content area displays a dashboard titled 'Doc test dashboard' with filters for 'cereal_name', 'manufacturer_code', and 'manu_k'. Below the filters is a donut chart titled 'Number of cereal brands by manufacturer' showing the distribution of brands by manufacturer. The legend includes American Home Food Pr..., General Mills, Kelloggs, Nabisco, and Post.

A message confirming the success of setting the dashboard appears briefly.

2. Click HOME on the main navigation bar.

The dashboard that you have specified as homepage is displayed.

The screenshot shows the Cloudera Data Visualization interface with the 'HOME' tab selected. The dashboard titled 'Doc test dashboard' is displayed. It includes filters for 'cereal_name', 'manufacturer_code', and 'manu_k'. Below the filters is a donut chart titled 'Number of cereal brands by manufacturer' showing the distribution of brands by manufacturer. The legend includes American Home Food Pr..., General Mills, Kelloggs, Nabisco, and Post. To the right of the chart is a table titled 'Sodium vs. calories' with columns for 'cereal_name', 'manufacturer', and 'sum(calories)'. The table lists various cereal brands and their corresponding manufacturers and calorie counts.

| cereal_name | manufacturer | sum(calories) |
|---------------------------|----------------|---------------|
| 100%_Bran | Nabisco | 70 |
| 100%_Natural_Bran | Quaker Oats | 120 |
| All-Bran | Kelloggs | 70 |
| All-Bran_with_Extra_Fiber | Kelloggs | 50 |
| Almond_Delight | Ralston Purina | 110 |
| Apple_Cinnamon_Cheerios | General Mills | 110 |
| Apple_Jacks | Kelloggs | 110 |

Getting the dashboard URL

Cloudera Data Visualization enables you to share a dashboard by providing a direct link to it. You can share the default URL of the dashboard or use a short version of the link. You also have the option to customize the short URL, which allows you to use more descriptive and more readable/memorable links. You can create your short links for example to indicate where the link leads or what the dashboard contains.

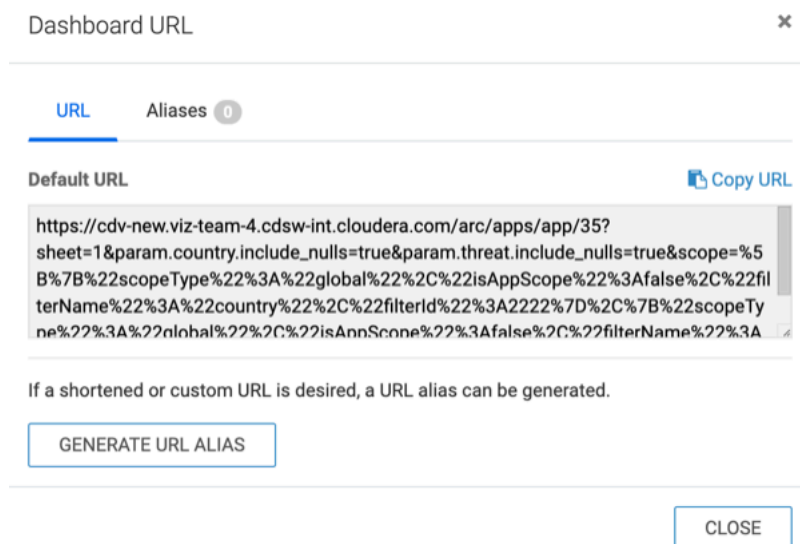
About this task

Short URLs can help you when adding dashboard links in emails or embedding the links in applications. When the user clicks the short version, they are automatically forwarded to the destination URL. The Get url action is available by default in Cloudera Data Visualization.

Procedure

1. Open a dashboard.
2. Click the (ellipsis) icon in the top right corner of the dashboard to open the supplemental menu and click Get URL.

The Dashboard URL modal window is displayed.



3. If you want to use the default URL, click **Copy URL** to copy the full URL to your clipboard.

If you want to use a short URL, follow these steps:

- a. Click GENERATE URL ALIAS.**

A random short URL will be generated. You can customize the short URL by changing the last section to your custom string. Make sure to only use allowed characters (A-Z a-z 0-9 _-)



Note: If you are trying to add an alias that is already being used, CDV will ask you to change it to a unique one.

Dashboard URL

URL Aliases 0

Default URL

Copy URL

https://cdv-new.viz-team-4.cdswh-int.cloudera.com/arc/apps/app/35?sheet=1¶m.country.include_nulls=true¶m.threat.include_nulls=true&scope=%5B%7B%22scopeType%22%3A%22global%22%2C%22isAppScope%22%3Afalse%2C%22filterName%22%3A%22country%22%2C%22filterId%22%3A2222%7D%2C%7B%22scopeType%22%3A%22global%22%2C%22isAppScope%22%3Afalse%2C%22filterName%22%3A

URL Alias

Copy URL

https://cdv-new.viz-team-4.cdswh-int.cloudera.com/arc/short/3a7LJS66Ek

☒ Include page parameters and filters

Click the **SAVE** button to save the URL alias for this dashboard and associated settings.




CLOSE

SAVE

- Decide if you want to include the dashboard parameters and filters in the short URL and set the option accordingly.
- Click SAVE.

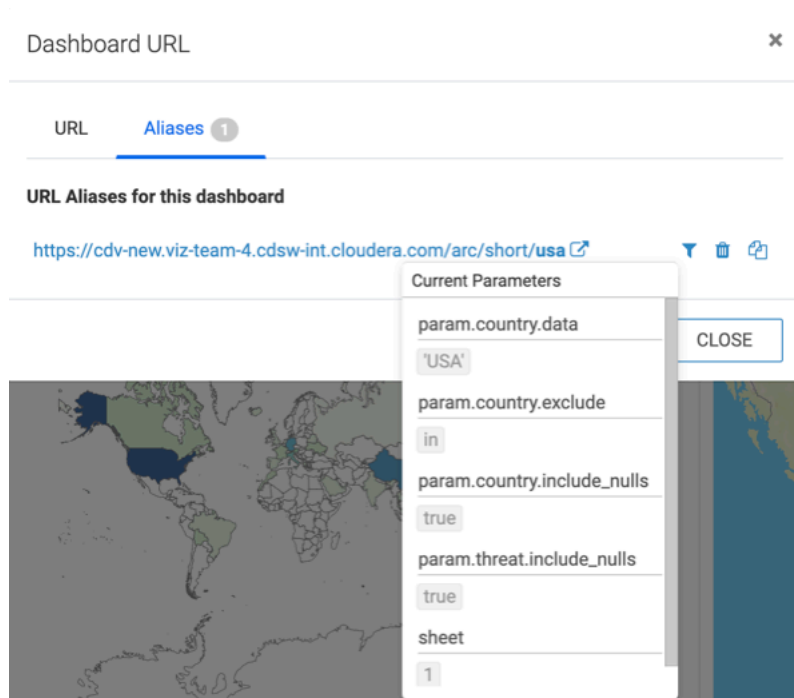
- The URL alias and the associated settings are saved.
- The Copy URL option becomes available for the newly created URL alias.
- The new URL alias is added to the Aliases tab.

It lists all short URLs created for the dashboard.

-  shows you the parameters and filters included.
-  allows you to delete the short URL.
-  allows you to copy the short URL to your clipboard.

- Click **Copy URL** above the URL alias on the URL tab to copy the short URL to your clipboard.
- Click **CLOSE**.

This example shows an alias where a custom URL is used and a dashboard filter has been included in the generated URL.



Emailing a dashboard

Cloudera Data Visualization enables you to share dashboards through email. You can send them immediately, schedule them at specific times and intervals, or through a triggered response when reaching a specific monitored threshold.

Before you begin

Before using the email function, you must enable the feature in site settings. For instructions, see *Email settings*.



Note: This setting is only available for users with administrative privileges.

Complete these prerequisites in your system configuration:


- Enable screenshot and thumbnail downloads. For instructions, see *Snapshots*.
- Enable email functionality. For instructions, see *Email settings*.
- Enable scheduled jobs. For instructions, see *Enabling scheduled jobs*.

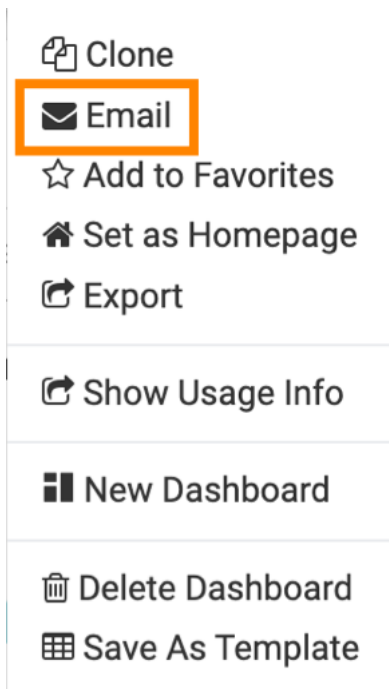


Note: You can only email one dashboard sheet at a time, but if you have more sheets on your dashboard, you can repeat this procedure for each sheet.

Procedure

1. Find the dashboard that you want to email. Open it either in Edit or in View mode.

2. In the top menu bar, click the  icon to open the supplemental menu and select Email.



The Send sheet modal window appears.

3. Choose one of the two options for sending email.

Email now – For instructions on how to provide email details, see *Immediate email*.

Send sheet

Emailing Method

☒ Email now ☐ Schedule email

Email Details

To *

CC

From

vizapps_admin<viztest00@gmail.com>

Subject *

[Cloudera Data Visualization]

Email Template

Default Email Template

Preview Email Template

Message

Message

Show Job Parameters

Attach ?

☒ Embedded Image ☐ PNG ☐ PDF ☐ XLSX ☐ CSV

Advanced Settings

Cancel

Save

Schedule email – For instructions on how to provide email and schedule details, see *Schedule-based email*.

The image shows two side-by-side screenshots of the 'Send sheet' dialog box. The left screenshot shows the 'Emailing Method' section with 'Schedule email' selected, and the 'Email Details' section with fields for To, CC, From, Subject, and Email Template. The right screenshot shows the 'Schedule Details' section with fields for Name and Schedule, and a 'No Scheduling' dropdown.

4. After creating emails, you can monitor them in the Jobs interface, review their details, rerun, cancel, and so on.

For more information, see *Managing jobs*.

Related Information

[Email settings](#)

[Snapshots](#)

[Enabling scheduled jobs](#)

[Immediate email](#)

[Schedule-based email](#)

[Threshold-based email](#)

[Managing jobs](#)

Downloading a dashboard

Cloudera Data Visualization enables you to save the current sheet of a dashboard in different file formats.

Downloading dashboard sheets as PNG files

Cloudera Data Visualization enables you to save the current sheet of a dashboard as a PNG file. The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created.

About this task

This method is better than using a desktop tool because it handles images that are too long or wide to fit the screen.

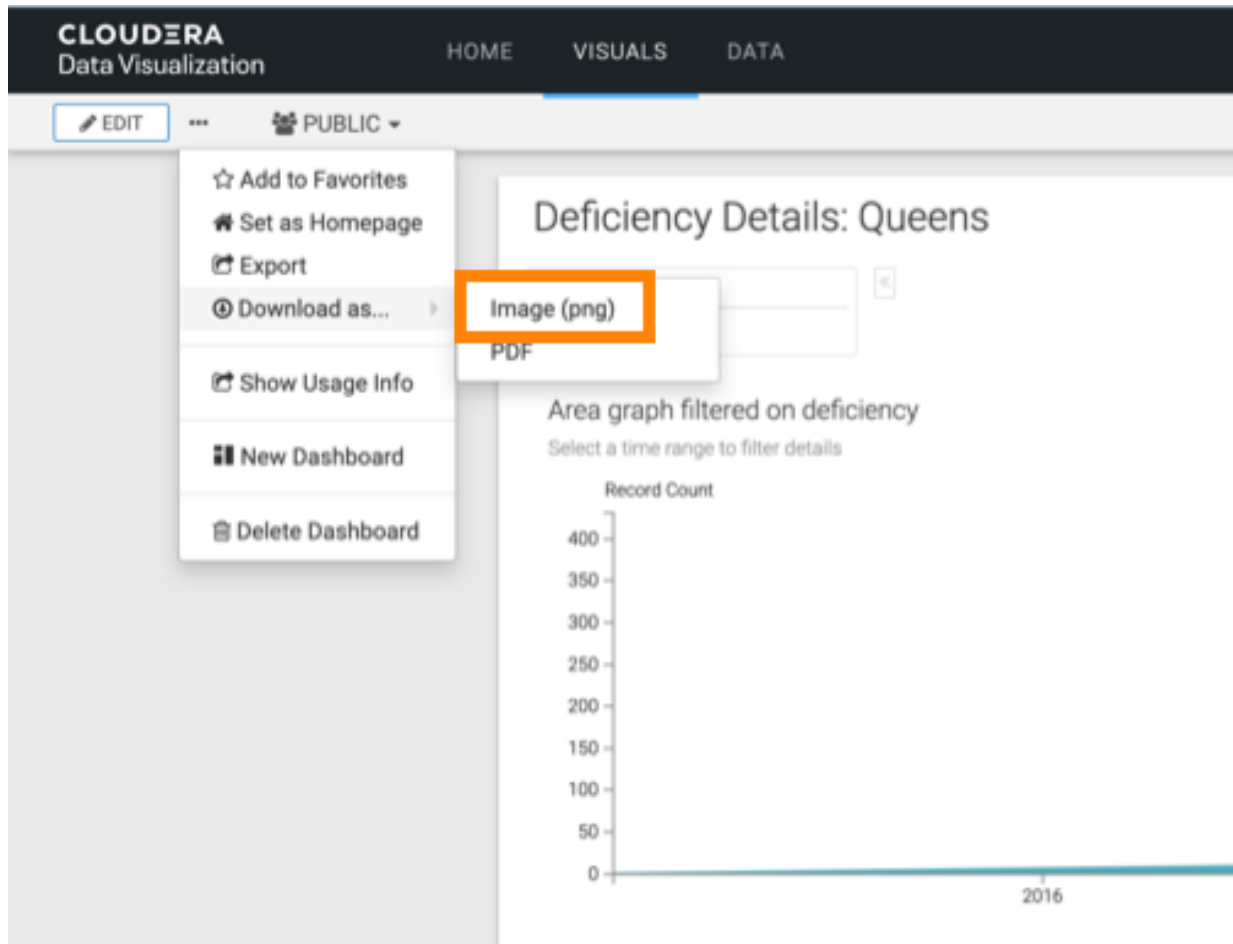


Note:

- This feature is available only when thumbnails are enabled.
- For snapshots of custom JS visuals, Cloudera Data Visualization supports only ECMA Script 5 for Javascript.
- Cloudera Data Visualization does not support PNG download on the Windows platform.

Procedure

1. In the Dashboard Designer top menu bar, click the (ellipsis) icon.
2. Click Download as..., and select Image (png) from the secondary menu.



A Generating the requested file message appears.

- After the download is complete, open the default download folder on your computer.

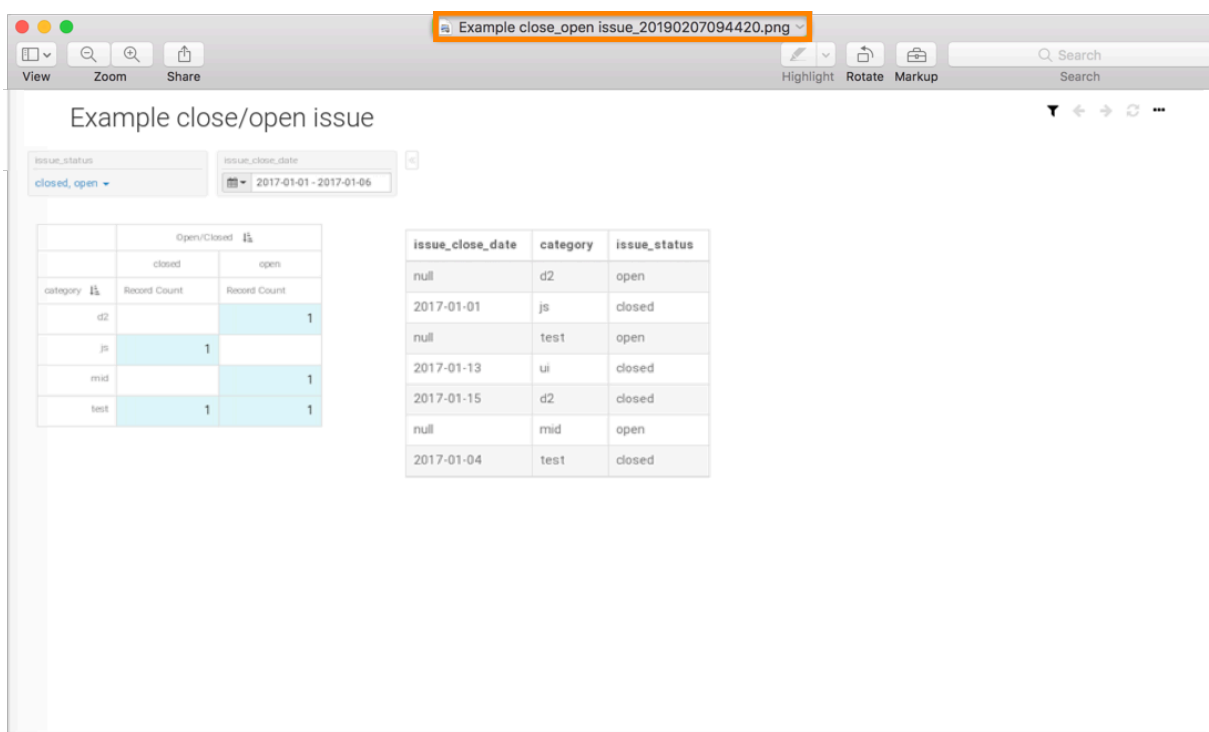
Cloudera Data Visualization saves the current sheet to a PNG file.

In our example, the generated filename, Example close_open issue_20190207094420, has the following components:

- Example close_open issue*
Same name as the dashboard
- 20190207*
Signifies the date the file is created, in YYYYMMDD format
- 094420*
Signifies the time the file is created, in hhmmss format



Note: Cloudera Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet Example close/open issue, it generates the file as Example close_open issue_XXXXXXXXXXXXX.pdf, replacing the forward-slash (ASCII #47) character with a space.



Downloading dashboards and sheets as PDF files

Cloudera Data Visualization enables you to save your dashboards, and individuals sheets as PDF files.

About this task



Note:

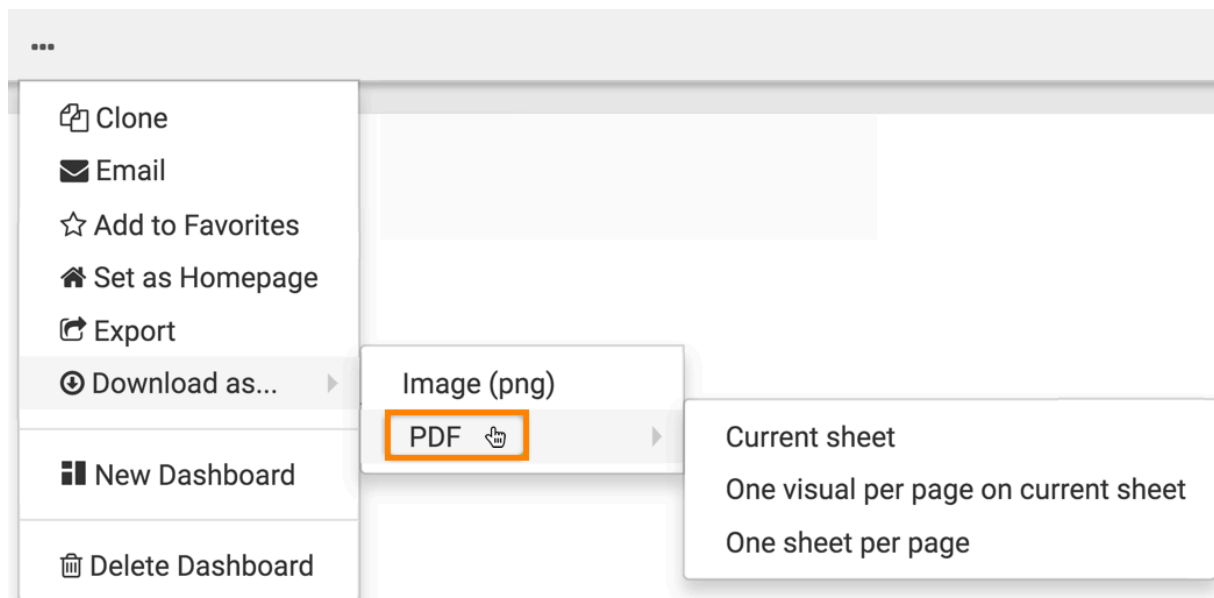
- This feature is available only when thumbnails are enabled.
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.

Before you begin

Before you download the dashboard as a PDF file, under Settings, navigate to the General menu, and select the Enable "Download as Image/PDF" option.

Procedure

1. In a dashboard, click the (ellipsis) icon at the top left corner of the interface.
2. Click Download as..., and select PDF from the secondary menu.



3. From the dropdown menu, select one of the following options:

- Current sheet
- One visual per page on current sheet
- One sheet per page

Downloading current sheet as a PDF file

Cloudera Data Visualization enables you to download the current sheet of a dashboard as a PDF file with all visuals in the current sheet on one page.

About this task



Note:

- This feature is available only when thumbnails are enabled .
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.
- For filtered visuals, the filter must have app scope.

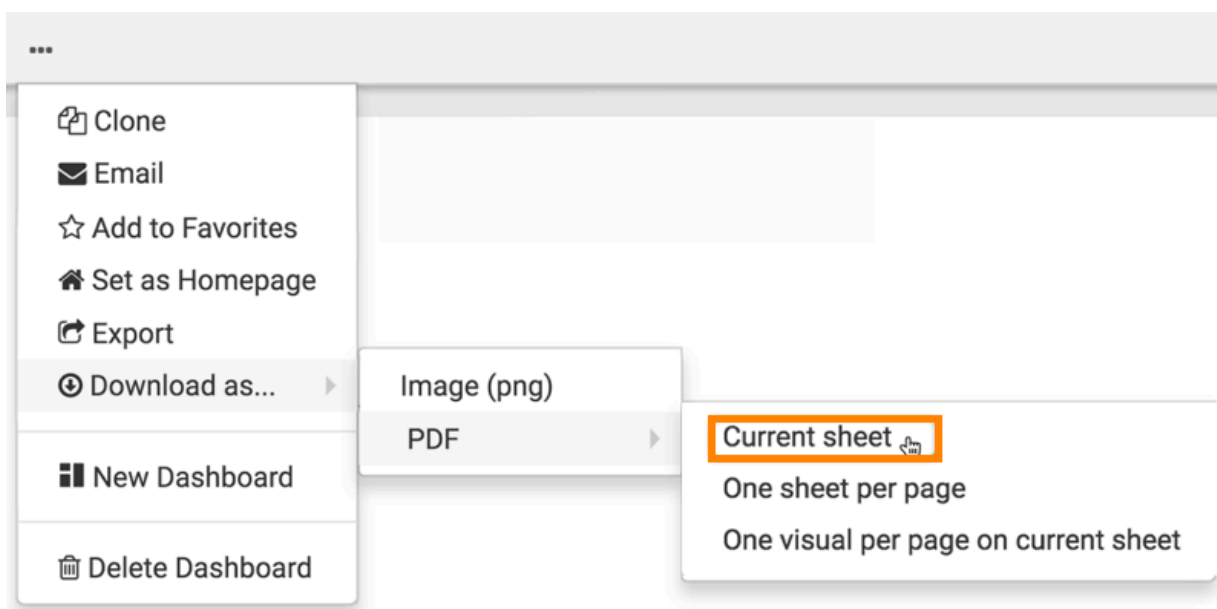
Before you begin

Before you download the dashboard as a PDF file, make sure that the Enable "Download as Image/PDF" option is enabled. You can find it in Site Administration Site Settings Snapshots .

Procedure

1. Open any dashboard.
2. Click the (ellipsis) icon at the top left corner of the interface.

3. Select Download as... PDF Current Sheet .



A Generating the requested file message appears.

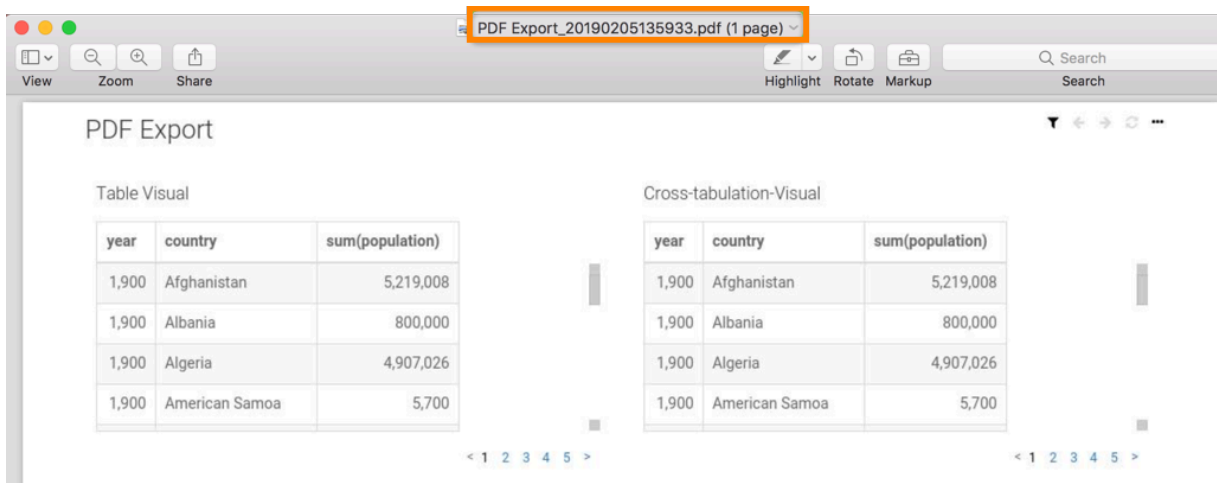
4. After the download is complete, open the default download folder on your computer. Cloudera Data Visualization saves the current sheet to a PDF file.

In this example, the generated filename, PDF Export_20190205135933, has the following components:

- *PDF Export*
Same name as the dashboard
- 20190205
Signifies the date the file is created, in YYYYMMDD format
- 135933
Signifies the time the file is created, in hhmmss format



Note: Cloudera Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet PDF/Export, it generates the file as PDF Export_xxxxxxxxxxxx.pdf, replacing the forward-slash (ASCII #47) character with a space.



The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created.

5. All visuals in the current sheet (Sheet 1) are on one page. Repeat the preceding steps to download Sheet 2.

Downloading all sheets as a PDF File

Cloudera Data Visualization enables you to download the entire dashboard as a PDF file with each sheet on a separate page.

About this task



Note:

- This feature is available only when thumbnails are enabled .
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.

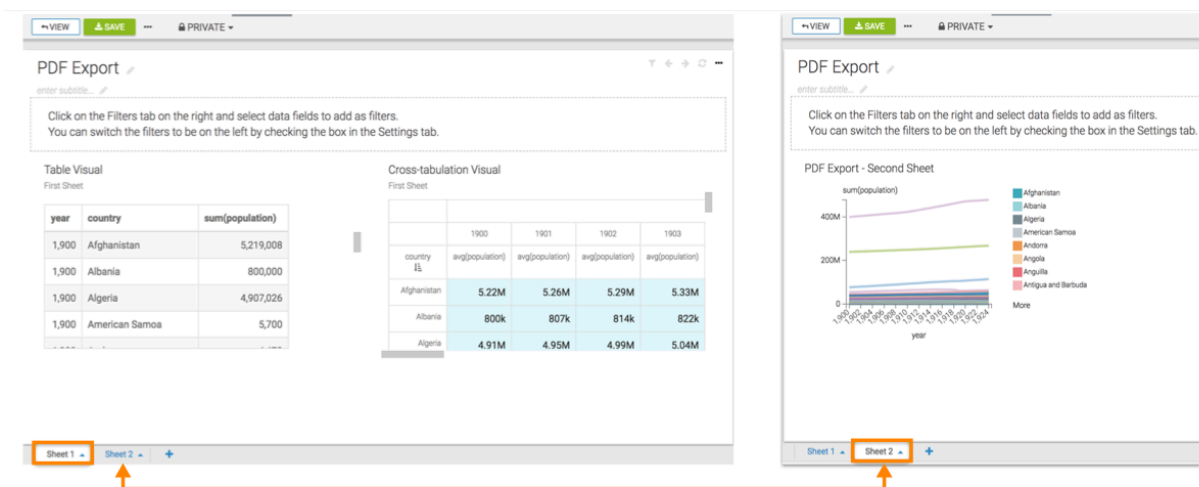
In the following example, you can see how to download Sheet 1 and Sheet 2 of the dashboard on separate pages.

Before you begin

Before you download the dashboard as a PDF file, make sure that the Enable "Download as Image/PDF" option is enabled. You can find it in Site Administration Site Settings Snapshots .

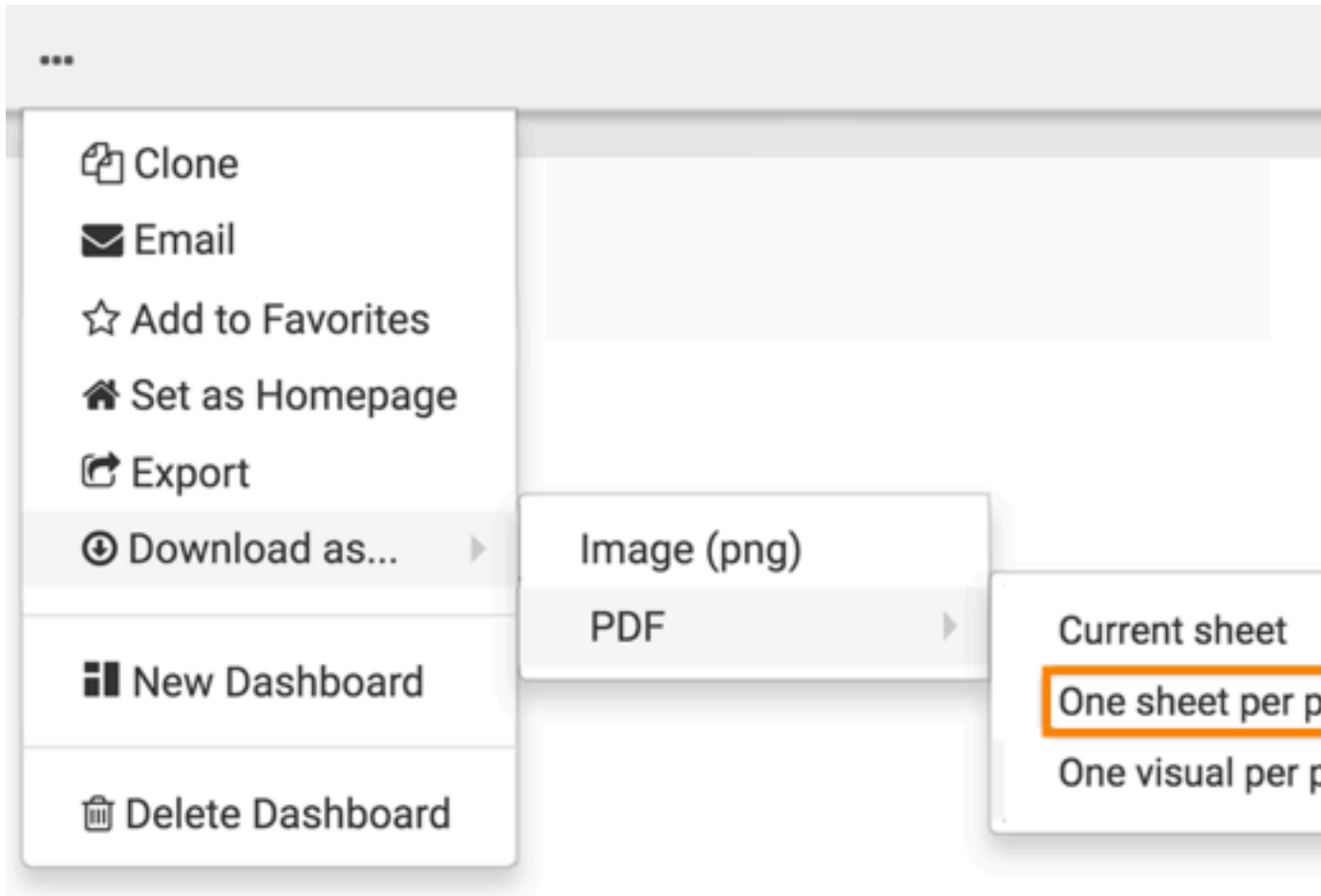
Procedure

1. Open any dashboard. In this example, the PDF Export dashboard that has two sheets is used.



2. Click the (ellipsis) icon at the top left corner of the interface.

3. Select Download as... PDF One sheet per page .



A Generating the requested file screenshot message appears.

- After the download is complete, open the default download folder on your computer. Cloudera Data Visualization saves the current sheet to a PDF file.

In this example, the generated filename, PDF Export_20190205142719, has the following components:

- PDF Export*

Same name as the dashboard

- 20190205*

Signifies the date the file is created, in YYYYMMDD format

- 142719*

Signifies the time the file is created, in hhmmss format



Note: Cloudera Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet PDF/Export, it generates the file as PDF Export_xxxxxxxxxxxx.pdf, replacing the forward-slash (ASCII #47) character with a space.

The screenshot shows a PDF viewer window with the title 'PDF Export_20190205142719.pdf (page 1 of 2)'. The dashboard content is divided into two sheets: 'Sheet 1' and 'Sheet 2'. 'Sheet 1' contains two tables and a line chart. 'Sheet 2' contains a line chart.

Table Visual (Sheet 1):

| year | country | sum(population) |
|-------|----------------|-----------------|
| 1,900 | Afghanistan | 5,219,008 |
| 1,900 | Albania | 800,000 |
| 1,900 | Algeria | 4,907,026 |
| 1,900 | American Samoa | 5,700 |

Cross-tabulation-Visual (Sheet 1):

| year | country | sum(population) |
|-------|----------------|-----------------|
| 1,900 | Afghanistan | 5,219,008 |
| 1,900 | Albania | 800,000 |
| 1,900 | Algeria | 4,907,026 |
| 1,900 | American Samoa | 5,700 |

Line Chart (Sheet 1):

The line chart displays the sum of population over time for various countries. The x-axis represents the year (1,900 to 1,904), and the y-axis represents the sum of population (0 to 400M). The legend includes Afghanistan, Albania, Algeria, American Samoa, Angola, Antigua and Barbuda, and More.

The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created. Each sheet of the dashboard is on a separate page.

Downloading current sheet with one visual per page as a PDF file

Cloudera Data Visualization enables you to download the current sheet as a PDF file with each visual on a separate page.

About this task

In the following example, you can see how to download a PDF file with each visual of the current sheet on a separate page.

Before you begin

Before you download the dashboard as a PDF file, make sure that the Enable "Download as Image/PDF" option is enabled. You can find it in [Site Administration Site Settings Snapshots](#) .

Procedure

- 1. Open any dashboard. In this example, the PDF Export dashboard is used, which has two visuals.

VIEW

SAVE

...

PRIVATE

PDF Export

enter subtitle...

Click on the Filters tab on the right and select data fields to add as filters.
You can switch the filters to be on the left by checking the box in the Settings ta

Table Visual

First Sheet

| year | country | sum(population) |
|-------|----------------|-----------------|
| 1,900 | Afghanistan | 5,219,008 |
| 1,900 | Albania | 800,000 |
| 1,900 | Algeria | 4,907,026 |
| 1,900 | American Samoa | 5,700 |

Cross-tal

First Sheet

country

Afghanis

Alba

Alge

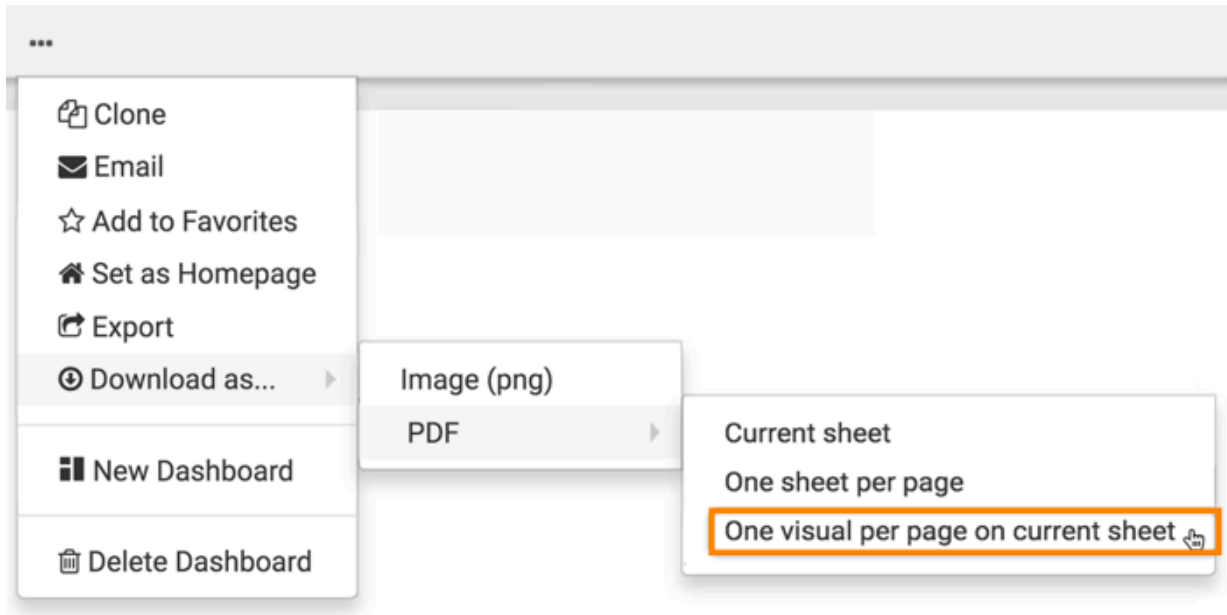
Sheet 1

Sheet 2

+

- 2. Click the (ellipsis) icon at the top left corner of the interface.

3. Select Download as... PDF One visual per page on current sheet .



A Generating the requested file screenshot message appears.

- After the download is complete, open the default download folder on your computer. Cloudera Data Visualization saves the current sheet to a PDF file.

In this example, the generated filename, PDF Export_20190205142003, has the following components:

- PDF Export*

Same name as the dashboard

- 20190205*

Signifies the date the file is created, in YYYYMMDD format

- 142003*

Signifies the time the file is created, in hhmmss format



Note: Cloudera Data Visualization renames sheets with names that contain characters not supported by the file system. For example, for the sheet PDF/Export, it generates the file as PDF Export_xxxxxxxxx xxxxx.pdf, replacing the forward-slash (ASCII #47) character with a space.

The screenshot shows a PDF viewer window with the title 'PDF Export_20190205142003.pdf (page 1 of 2)'. The dashboard content is visible on the right side of the window. It includes a table of population data and a cross-tabulation visual.

| year | country | sum(population) |
|-------|---------------------|-----------------|
| 1,900 | Afghanistan | 5,219,008 |
| 1,900 | Albania | 800,000 |
| 1,900 | Algeria | 4,907,026 |
| 1,900 | American Samoa | 5,700 |
| 1,900 | Andorra | 4,472 |
| 1,900 | Angola | 2,797,597 |
| 1,900 | Anguilla | 3,584 |
| 1,900 | Antigua and Barbuda | 35,195 |
| 1,900 | Argentina | 4,693,000 |
| 1,900 | Armenia | 857,667 |
| 1,900 | Aruba | 29,306 |
| 1,900 | Australia | 3,741,000 |

The cross-tabulation visual is also present below the table.

The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created. Each visual in the current sheet is on a separate page.

Exporting a dashboard

In Cloudera Data Visualization, you can export visuals, dashboards and other visual artifacts. You can use the export function to port these artifacts from development/testing environments to production deployments or for creating back-ups.

About this task

Exporting a dashboard from a Cloudera Data Visualization instance generates a JSON file and saves it into your download directory. You can use this file to import the visual artifacts to a new system, and deploy them if the new environment has identical data connections.

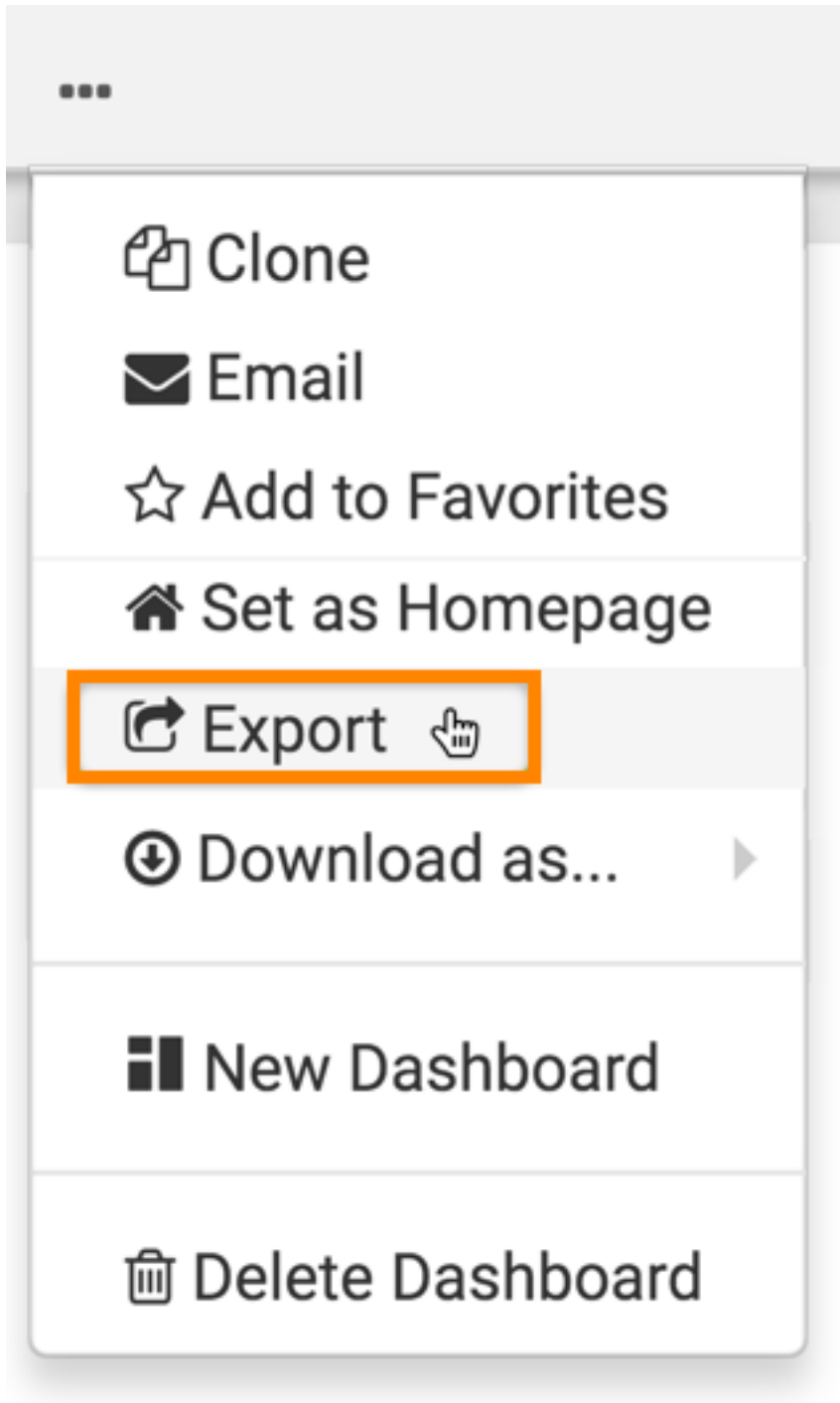


Note: You need the Manage visuals and dashboards privilege to export visual artifacts.

Procedure

1. Find the dashboard you want to export. Open it either in Edit or View mode.

2. Open the (supplemental) menu from the top menu bar and click Export.



The Export Visual Artifacts modal window appears.












Note: In addition to the dashboard itself, the utility exports all dashboard elements: visuals, datasets, static assets, custom styles, and custom color.

3. Click EXPORT to confirm the export of the dashboard.

Export Visual Artifacts ×

Filename

| Object Type | Object Name | ID |
|--|---------------------|--------------|
|  Dashboard | Portal | Company Home |
|  Visual | home | 340 |
|  Dataset | Census | 40 |
|  Static Asset | splash | 6 |
|  Static Asset | logo small | 7 |
|  Custom Style | Custom radio button | 113 |
|  Custom Style | App vuln | 114 |
|  Custom Color | color_one | 1 |

CLOSE EXPORT 

What to do next

For instructions on how to import a dashboard, see *Importing a dashboard*.

For more information about the visual artifact migration utility, see *Exporting and importing visual artifacts*.

Related Information

[Importing a dashboard](#)

[Exporting and importing visual artifacts](#)

Importing a dashboard

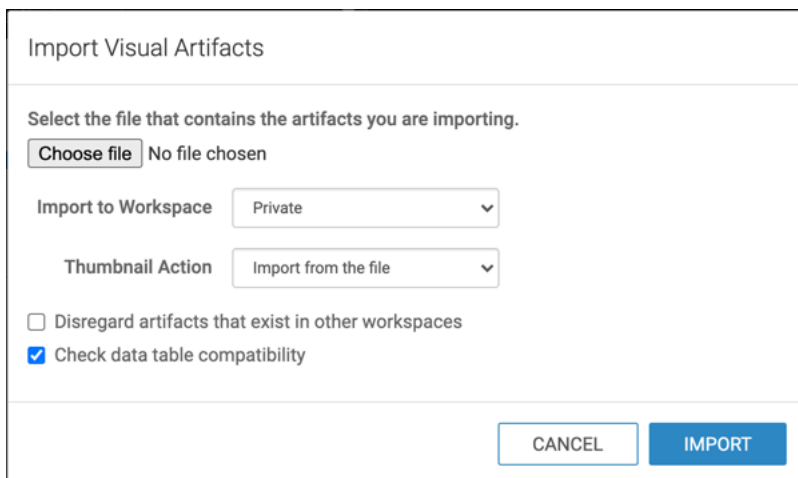
In Cloudera Data Visualization, you can import visuals, dashboards and other visual artifacts exported from another system. You can use the migration utility to port these artifacts from development/testing environments to production deployments or for creating back-ups. All you need is the appropriate JSON file that captures the definitions of these visual artifacts and all their dependencies (such as datasets and custom styles).

Procedure

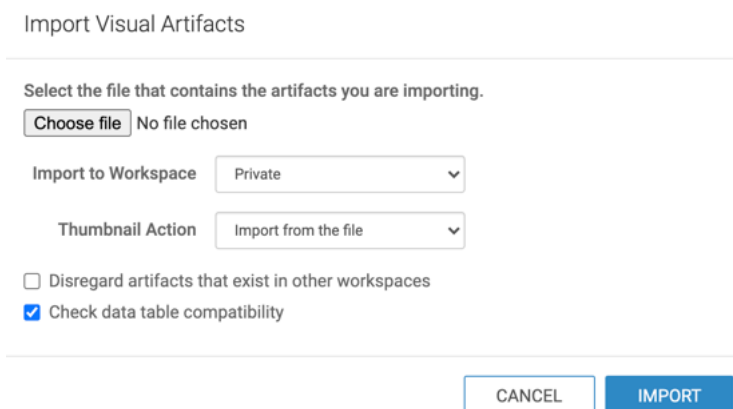
1. Click DATA on the main navigation bar.
2. Select the connection where you want to import the artifacts.

In this example, the Samples connection has been selected showing connecting to the same data source for both systems.

3. At the top of the screen, open the (supplemental) menu and select Import Visual Artifacts.



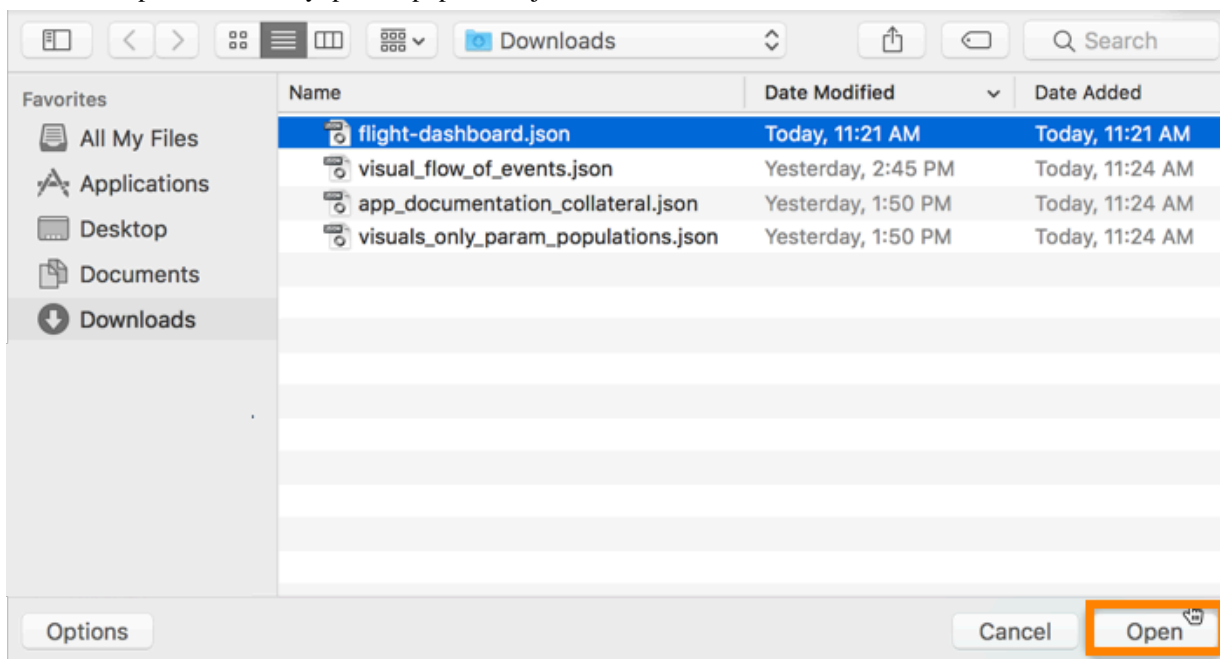
The Import Visual Artifacts modal window appears.



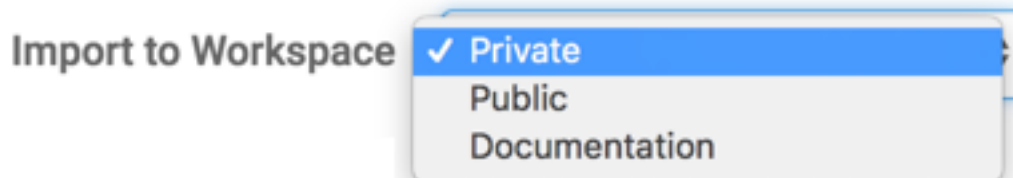
4. Click Choose File.

5. Select the file you want to import.

In this example, `visuals_only_param_population.json` is selected.



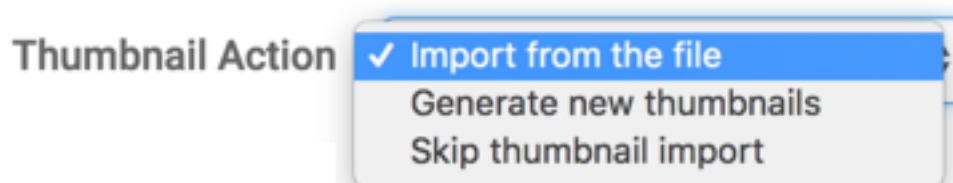
6. Specify the destination workspace in the Import to Workspace drop-down menu.



By default, Cloudera Data Visualization imports the visual artifacts into your Private workspace. However, you can choose the Public workspace, or another workspace.

7. Specify how you want to handle thumbnails.

There are three options:



By default, Cloudera Data Visualization imports the thumbnails from the file. However, you can choose to generate new thumbnails during the import process, or skip thumbnail import.

8. Define the Disregard artifacts that exist in other workspaces option.

Before importing an artifact, Cloudera Data Visualization searches for it on the system. If it already exists, it is either updated (if changed from a previous import), or left 'as is'. If it does not exist, it is imported as a new visual artifact. By default, the search domain is the entire system. By selecting this option, you are limiting the search to the specified workspace.

9. Check data table compatibility.

This is to confirm that tables suitable for the incoming dataset(s) exist on the system. It means that the database and tables have the same names on the source and target systems. This option is 'on' by default.

10. Click IMPORT.

After processing the import JSON file, Cloudera Data Visualization opens the Import interface to show its visual artifacts. It displays the visual artifacts that you saved earlier into a JSON file during export. The Planned Action column shows that this is a new import for all artifacts. At this point, none of them have an assigned ID.

The screenshot shows the Cloudera Data Visualization interface with the 'Import' section active. At the top, there's a navigation bar with 'HOME', 'VISUALS', and 'DATA' tabs, and a search bar. Below the navigation bar, the 'Import' section has two buttons: 'DON'T IMPORT' and 'ACCEPT AND IMPORT'. A table below lists the imported artifacts:

| Object Type | Object Name | Planned Action | ID |
|-------------|--|----------------|----|
| Dashboard | Flight Delay Information | NEW | -- |
| Visual | Departure Delay by Airline & Day of the week | NEW | -- |
| Visual | Originating Airport | NEW | -- |
| Visual | Originating Airport by State | NEW | -- |
| Dataset | Flight Data | NEW | -- |

11. Click ACCEPT AND IMPORT.**Results**

After the import completes, a success message appears on the Import interface. All the artifacts have an assigned ID, which are generated by the system, sequentially. Visuals/Dashboards and datasets have separate ID queues.

The screenshot shows the Cloudera Data Visualization interface after a successful import. A green success message banner at the top reads: 'Success! The import was successful.' Below the banner, the 'Import' section still has the 'DON'T IMPORT' and 'ACCEPT AND IMPORT' buttons. The table below now shows the artifacts with assigned IDs:

| Object Type | Object Name | Planned Action | ID |
|-------------|--|----------------|-----|
| Dashboard | Flight Delay Information | NEW | 464 |
| Visual | Departure Delay by Airline & Day of the week | NEW | 460 |
| Visual | Originating Airport | NEW | 461 |
| Visual | Originating Airport by State | NEW | 462 |
| Dataset | Flight Data | NEW | 77 |

For instructions on how to export a dashboard, see *Exporting a dashboard*.

For more information about the visual artifact migration utility, see *Exporting and importing visual artifacts*.

Related Information

[Exporting a dashboard](#)

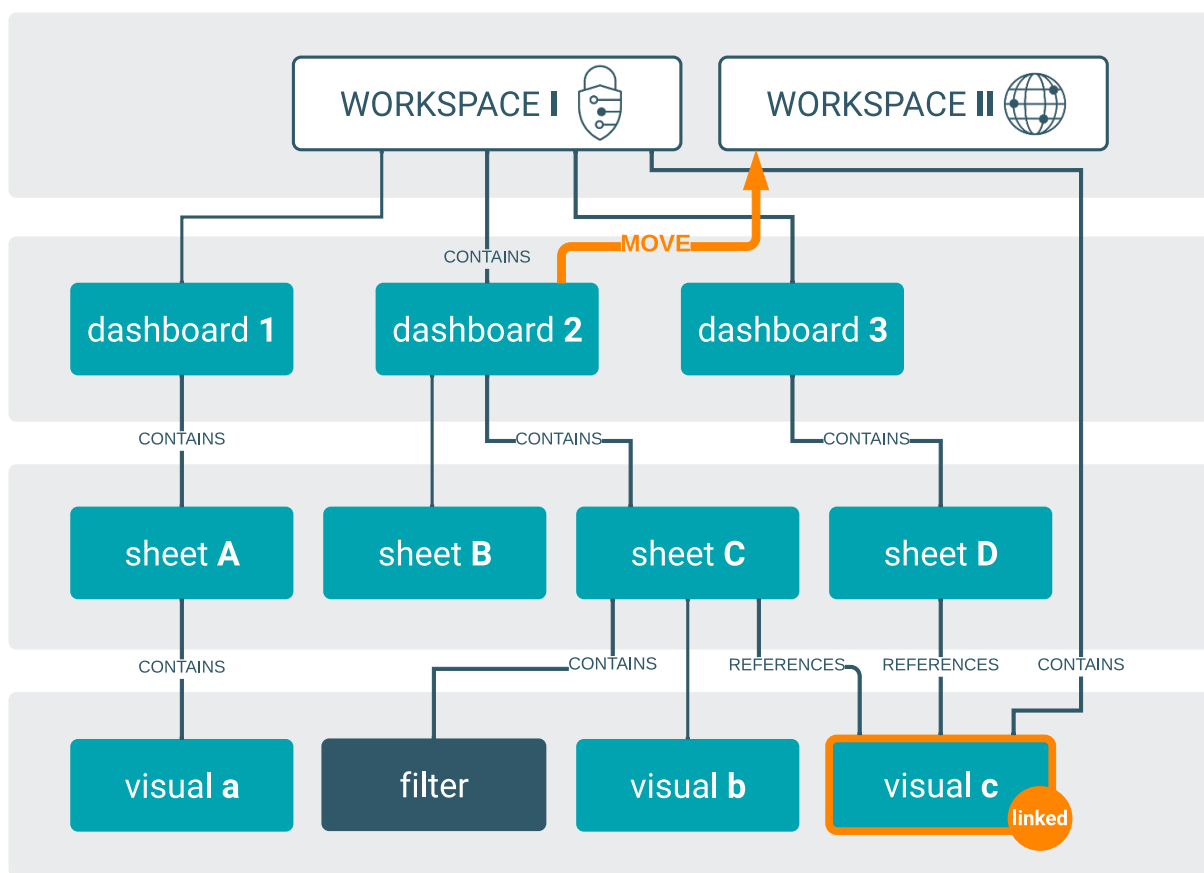
[Exporting and importing visual artifacts](#)

Moving a dashboard

If you have a dashboard in a development workspace (it can be your private or a custom workspace), you can move it to a public workspace so that everyone across the organization can access the analytical insights that the dashboard provides. Depending on your needs and your Cloudera Data Visualization installation, you can also designate the public workspace as the collection of customer-facing dashboards.

Cloudera Data Visualization utilizes Role-Based Access Control (RBAC) permissions to govern access to functionalities in the system. Administrators or users with Additional system privilege can move dashboards and apps to any workspace, including private ones.

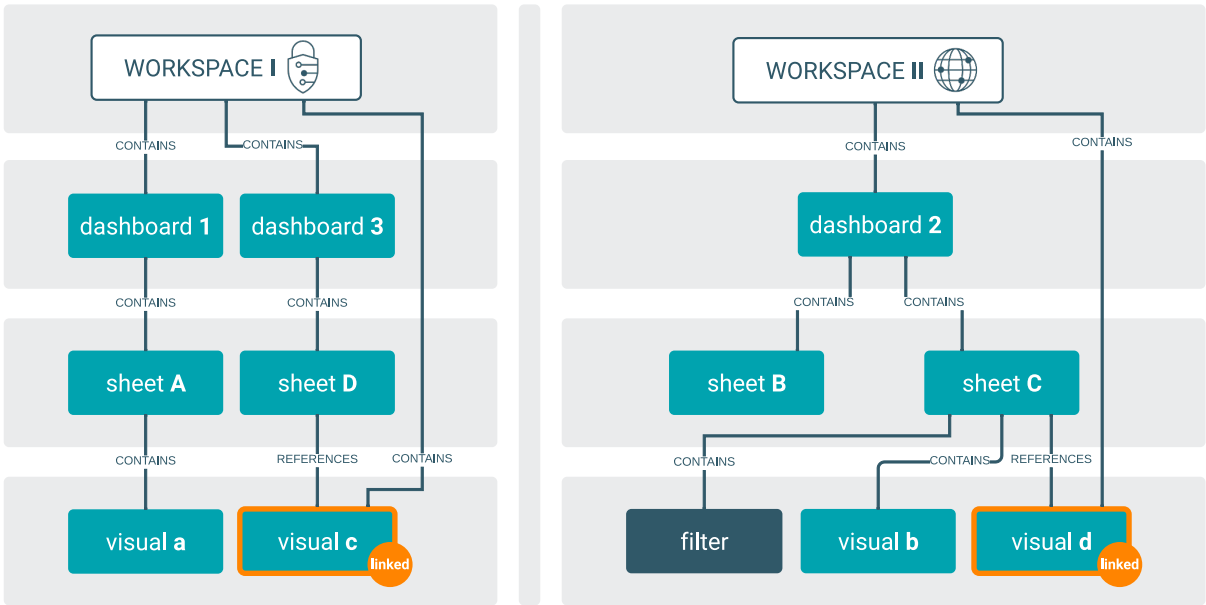
When the dashboard you are moving contains a linked visual that is used by another dashboard in the workspace, you have two options: to clone it or to move it. For more information on what happens in each case, see the following diagram. In this example, dashboard 2 is moved from WORKSPACE I (private) to WORKSPACE II (public). Visual c is a linked visual, used by both dashboard 2 and dashboard 3.



Cloning linked visuals

Cloning linked visuals allows you to create a duplicate of a linked visual. This creates a new linked visual on a specific dashboard in a designated workspace without changing the original dashboard.

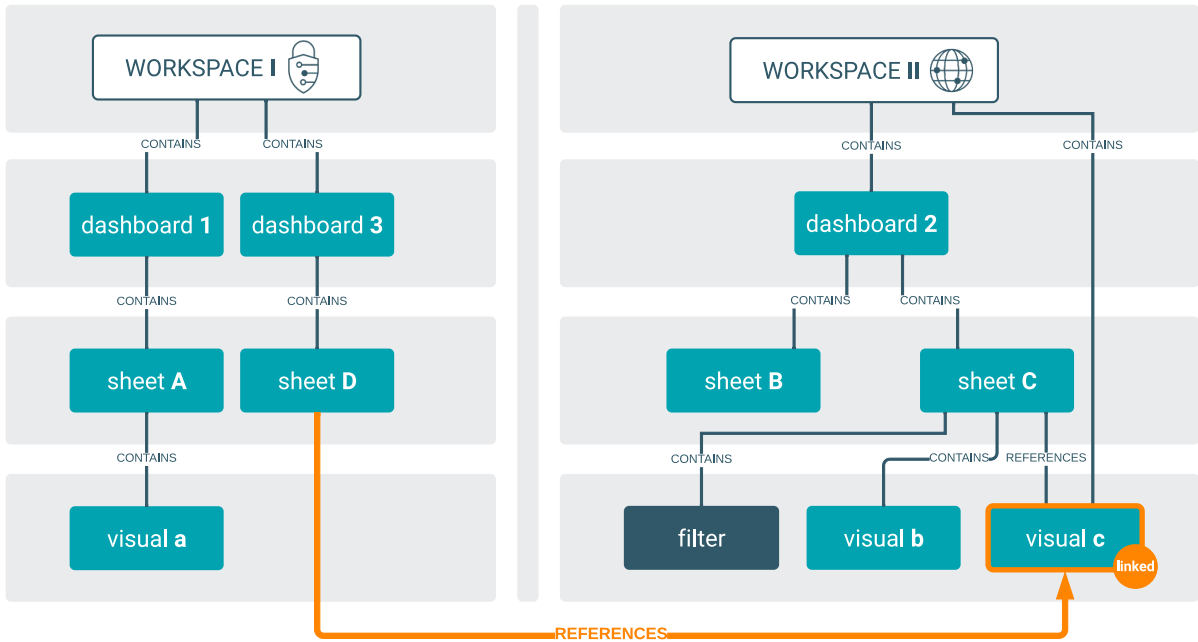
Visual c is a linked visual artifact on dashboard 3 of WORKSPACE I. If you clone visual c, you create a new visual (visual d) in WORKSPACE II. The new visual d is also linked. Dashboard 3 in WORKSPACE I remains unchanged: visual c is still there, and it is still a linked visual.



Moving linked visuals

Relocating a linked visual between workspaces provides you with flexibility in organizing, managing and sharing your visual elements.

If you move the linked visual c between the workspaces, it remains a linked visual in its new location in WORKSPACE II. However, this has an impact on dashboard 3 in WORKSPACE I. While visual c is still part of the dashboard, it is referenced in an external workspace. Because visual c is no longer part of the same workspace, users who do not have sufficient permissions for WORKSPACE II will not be able to see the visual from WORKSPACE I. This is more likely to happen when moving dashboards from the public workspace into a custom workspace.



Moving dashboards between workspaces

You can move dashboards between the private, public, and custom workspaces in any direction. Whether you are transitioning dashboards for personal use, sharing them with a broader audience, or customizing your workspace organization, Cloudera Data Visualization enables you to manage your dashboards easily across different workspaces.

About this task

As a dashboard owner, you can easily designate a private dashboard as public by shifting it from your private workspace to a public workspace. Moreover, you have the option to move dashboards in various directions, leveraging private or custom workspaces.

This dynamic capability allows you to create and test dashboards in your private workspace and, when ready, share them with others by moving them to a public workspace. By doing so, individuals with at least viewing privileges for the relevant datasets gain access to the dashboard.



Note: Cloudera Data Visualization utilizes Role-Based Access Control (RBAC) permissions to govern access to functionalities in the system. Administrators or users with Additional system privilege can move dashboards and apps to any workspace, including private ones.

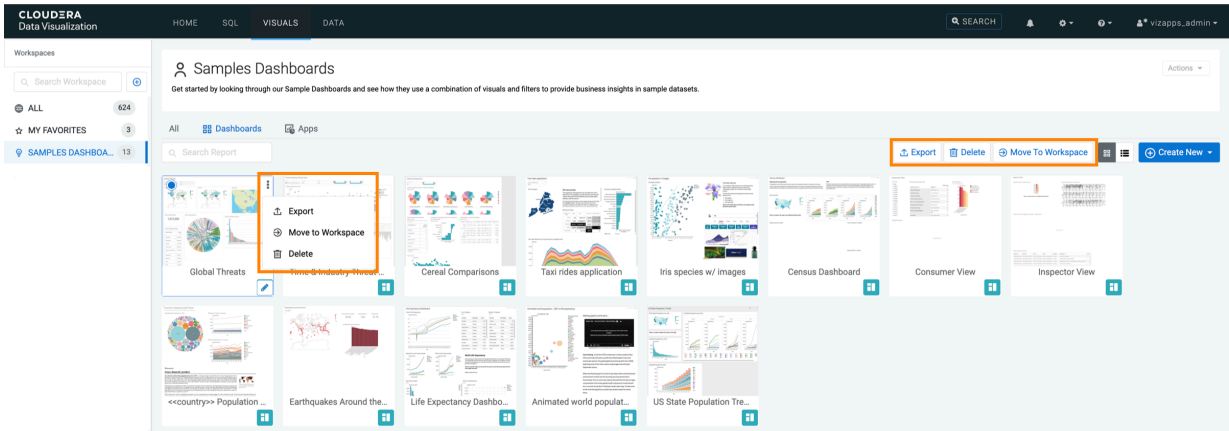
On the VISUALS interface

If you do not want to open the dashboard, you can move it to a different workspace on the VISUALS interface.

- 1. Hover over the dashboard tile or row and use the Move to Workspace function from the Supplemental menu of the tile. You can also use Move to Workspace from the actions available in the top right corner of the preview area of the interface.



Note: The action buttons are only active if you select at least one artifact in the preview area.



The Move to Workspace modal window is displayed. It provides information about the dashboard you want to move.

Move To Workspace

| Name | Type | ID | Current workspace | Actions |
|----------------|-----------|----|-------------------|---------|
| Global Threats | dashboard | 35 | Doc test | |

Select...

Cancel

Move

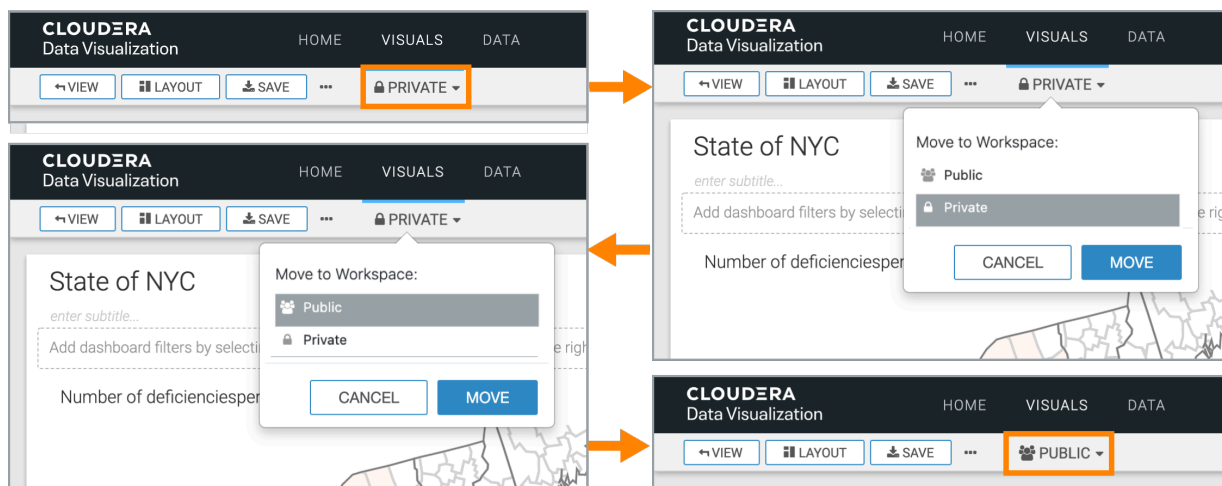
- 2. Set the new workspace from the drop-down list and click Move.

After opening the dashboard

Procedure

- 1. Find the dashboard you want to move and open it in Edit or View mode.
- 2. Click the workspace indicator in the top menu of the dashboard.
- 3. From the drop-down menu, choose the workspace where you want to move the dashboard.
In this example, the dashboard is in the Private workspace. Select Public.

- After selecting the new workspace, click MOVE.



The dashboard is now in the Public workspace. You can verify it by navigating to the Visuals interface, and then selecting and expanding the destination workspace.

This process is flexible and works for moving dashboards between private, public, and custom workspaces, in any direction. Just ensure you have the necessary privileges to perform the action.



Important: Once a dashboard is added to an app, it cannot be reverted to Private.

Refreshing visuals manually in dashboards

Cloudera Data Visualization enables you to manually refresh visuals in dashboards.

About this task

If you have a slow back-end data connection and your dashboard is loading slowly, you can choose to load the filters first, specify their settings, and then manually load the visuals.

Procedure

- Open the dashboard in Edit mode.
In this example, the World Life Expectancy dashboard is used.
- In the Dashboard Designer, select the Settings menu.
- Click the General menu to expand it.
- Select the Refresh visuals manually option.

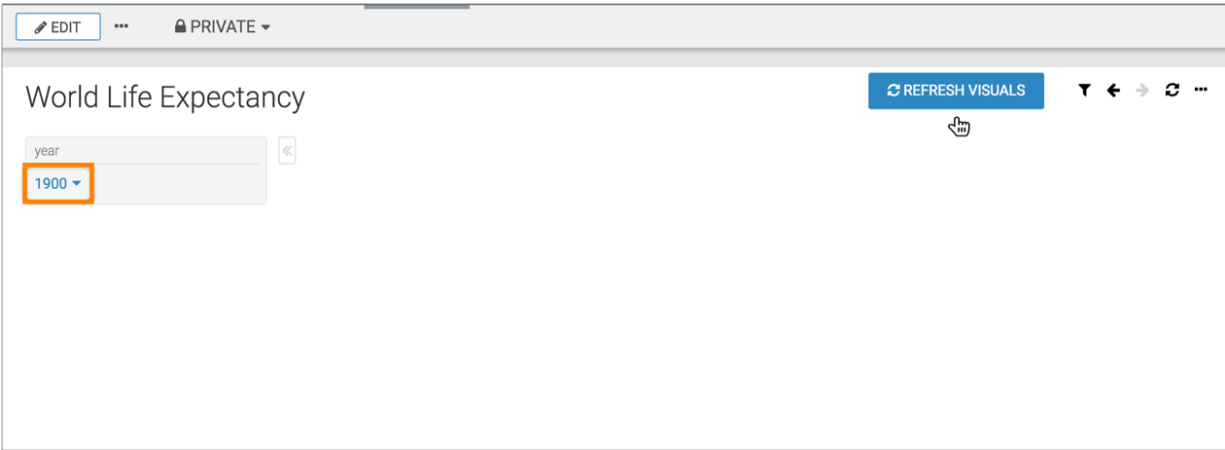


This adds a REFRESH VISUALS button to the dashboard.

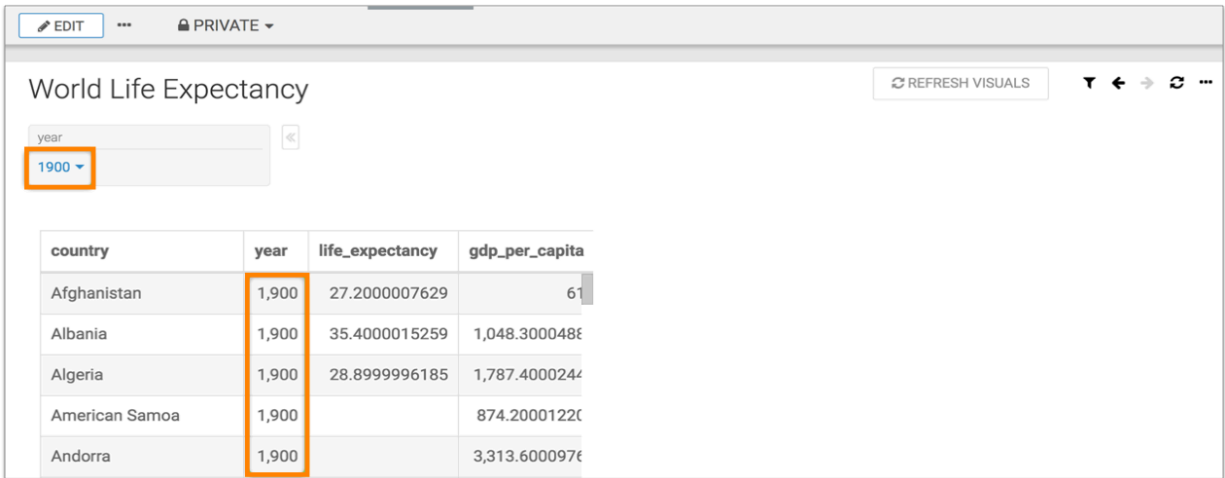
- Under Filters, click the year field to add a new filter widget to the dashboard and select 1900 from the dropdown.
- Click SAVE.
- Switch to View mode.

Only the filter widget appears on the dashboard without any visuals.

8. To view visuals, click REFRESH VISUALS in the top right corner of the dashboard.

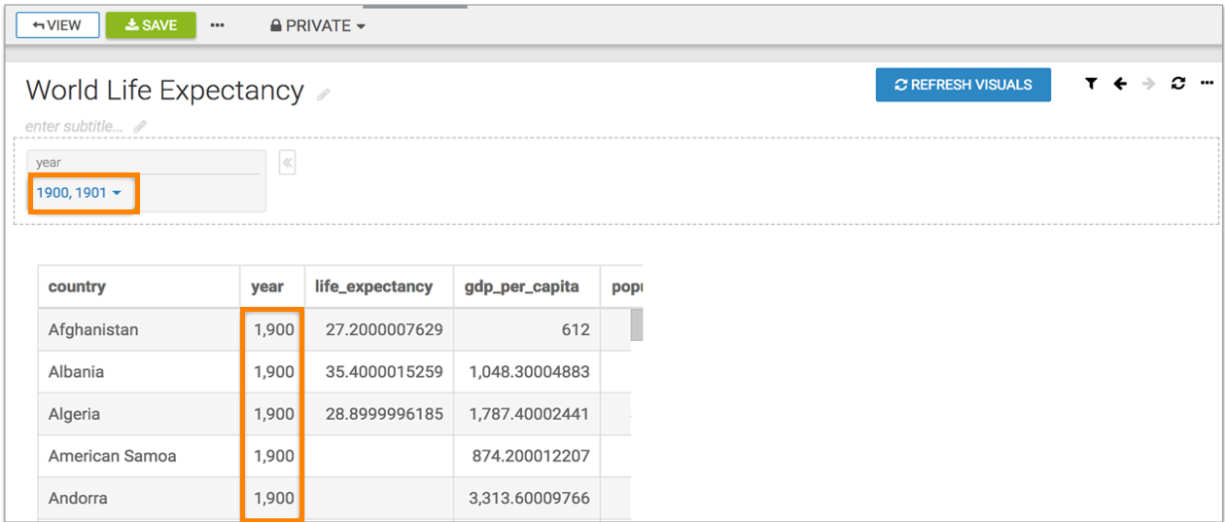


The visual now appears in the dashboard along with the defined filter.



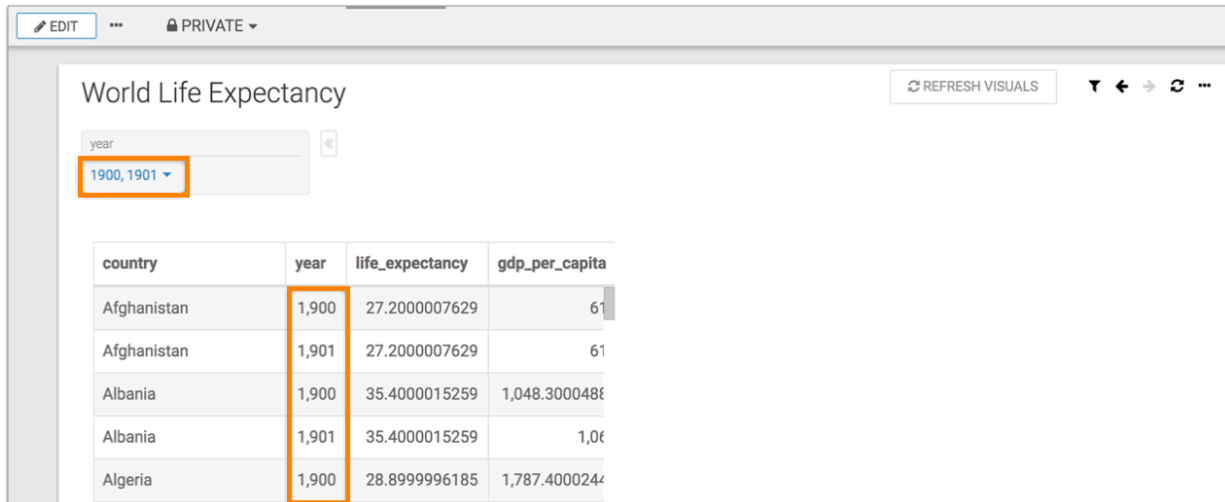
9. Add the year 1901 to the filter.

As soon as you change the filter, the filter refreshes to show both the values 1900, 1901, but the visual does not refresh. The year column continues to show only 1900. Also, the REFRESH VISUALS button again appears in the top right corner of the dashboard.



10. To render the updated visual, click **REFRESH VISUALS**.

The year column now shows the updated values, 1900 and 1901.



World Life Expectancy

year

1900, 1901

| country | year | life_expectancy | gdp_per_capita |
|-------------|-------|-----------------|----------------|
| Afghanistan | 1,900 | 27.2000007629 | 61 |
| Afghanistan | 1,901 | 27.2000007629 | 61 |
| Albania | 1,900 | 35.4000015259 | 1,048.3000488 |
| Albania | 1,901 | 35.4000015259 | 1,06 |
| Algeria | 1,900 | 28.8999996185 | 1,787.4000244 |

11. Click **SAVE**.

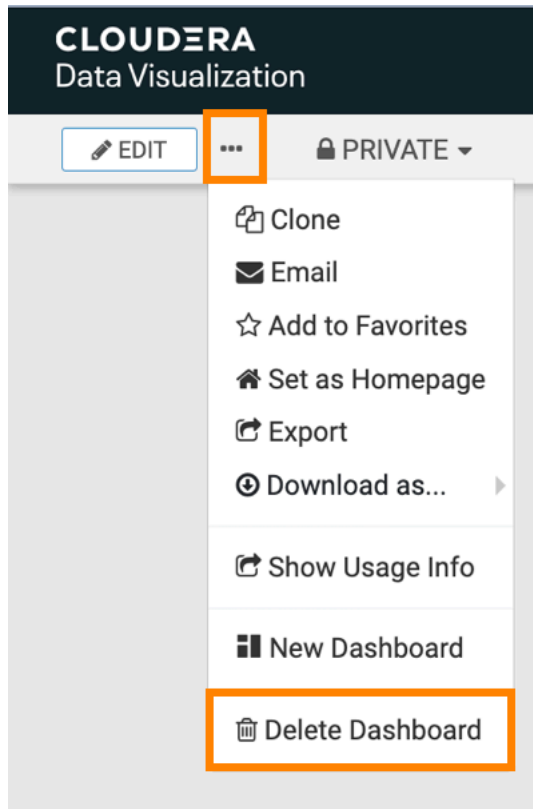
Deleting a dashboard

You can easily delete dashboards that you no longer use in Cloudera Data Visualization.

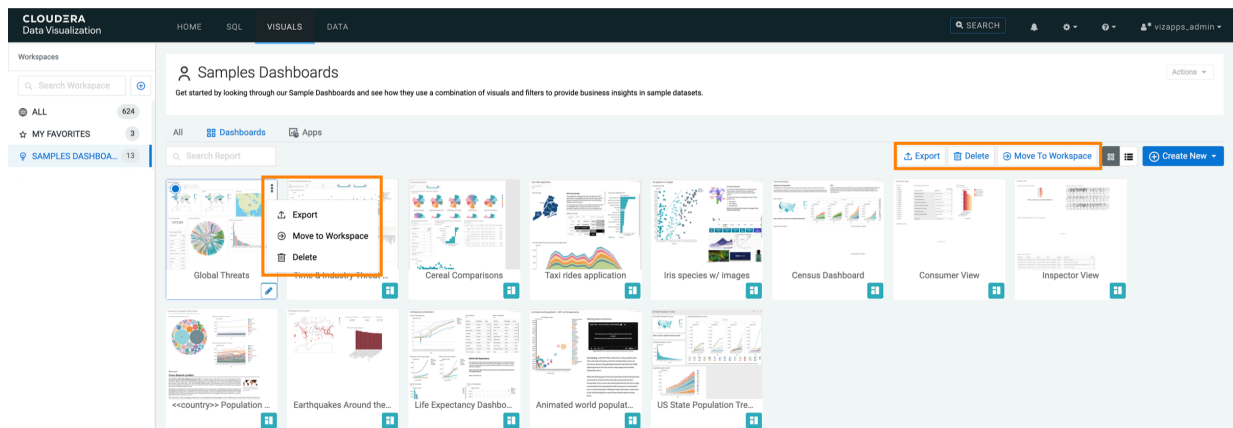
Procedure

1. Find the dashboard you want to delete and open it either in Edit or View mode.

2. Click the (supplemental) menu in the top menu bar and select Delete Dashboard.



Alternatively, if you do not want to open the dashboard, you can delete on the VISUALS interface as well. Just hover over the dashboard tile or row and click Delete from its Supplemental menu. You can also use Delete from the actions available in the top right corner of the preview area of the interface.




The Delete Visual Artifacts modal window appears providing information about the dashboard you are about to delete.

Delete Visual Artifacts ×

| Name | Type | ID | Last updated | Modified by | Dataset |
|--------------------|-----------|------|--------------|---------------|------------------------------|
| Doc test dashboard | dashboard | 4266 | 3 hours ago | vizapps_admin | Cereals - 11 |

To confirm, type the word DELETE in the field below and then click the Delete button.

Cancel Delete

3. Type DELETE to confirm deleting the dashboard and click the Delete button.