

Dashboards

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Creating a dashboard

You can easily create new dashboards in Cloudera Data Visualization.

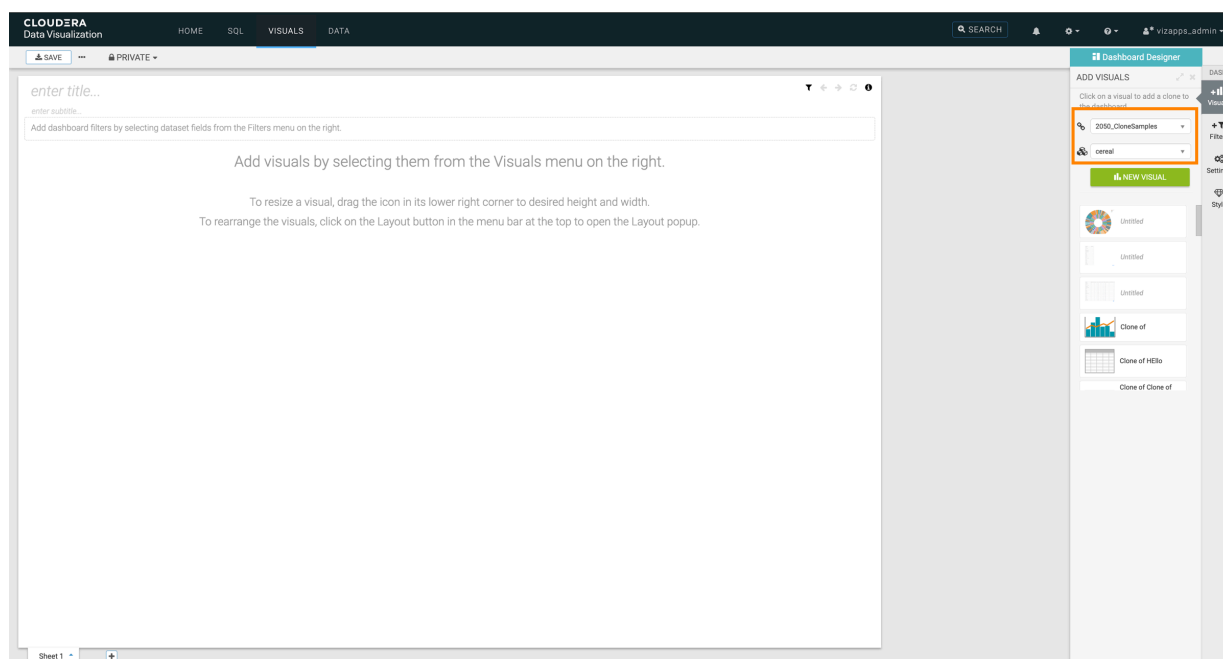
Procedure

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  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.

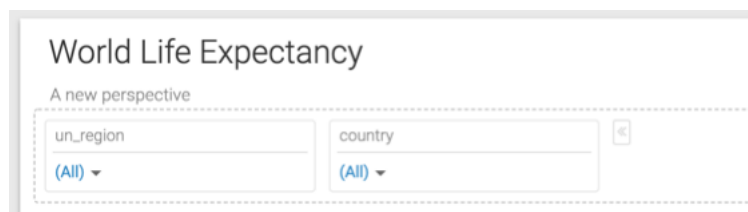
The dashboard is automatically connected to the parent connection and dataset, but you can add visuals and filters based on other connections and datasets.



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 is displayed.

You can see widgets in the modal 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.

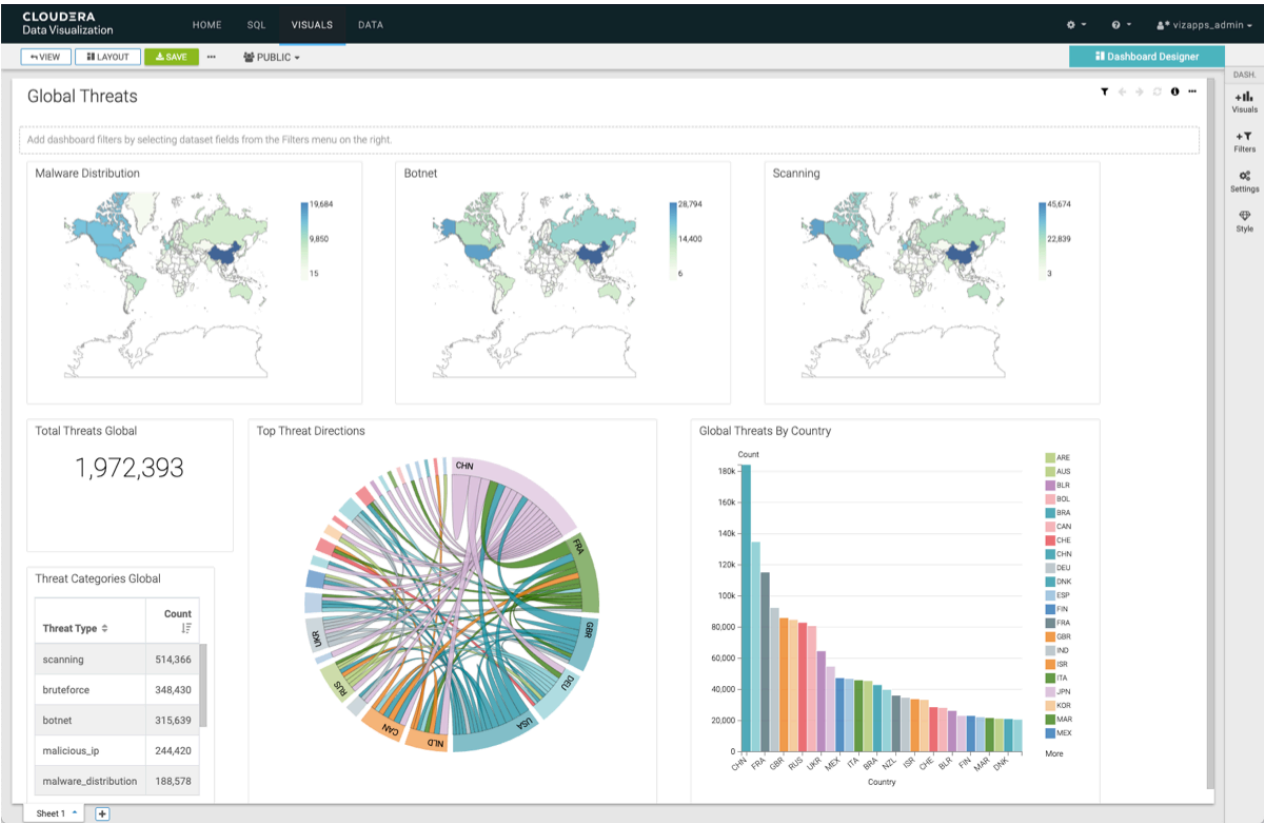
3. To reorganize visuals on the canvas, click and drag the widgets to the desired positions.
4. To resize a widget, click and drag its bottom-right corner and set the desired dimensions.
5. Once you have achieved the desired layout, click APPLY LAYOUT.

Results

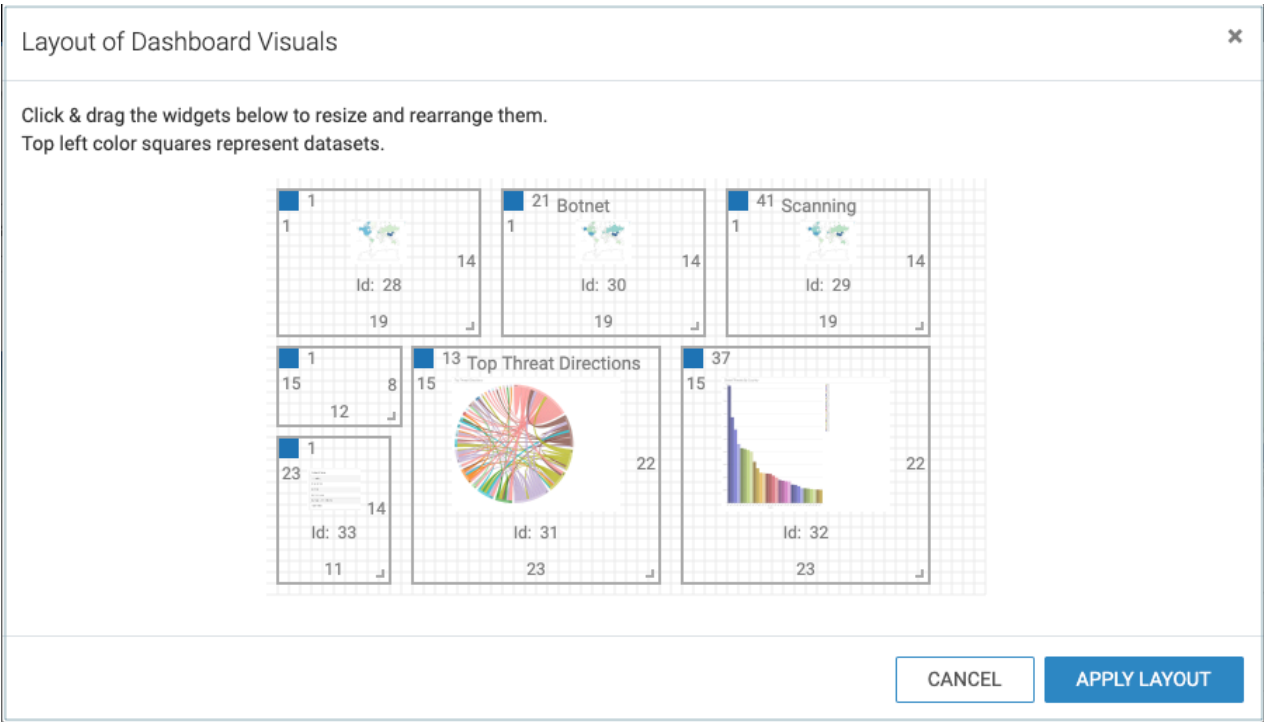
The dashboard layout is updated.

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:



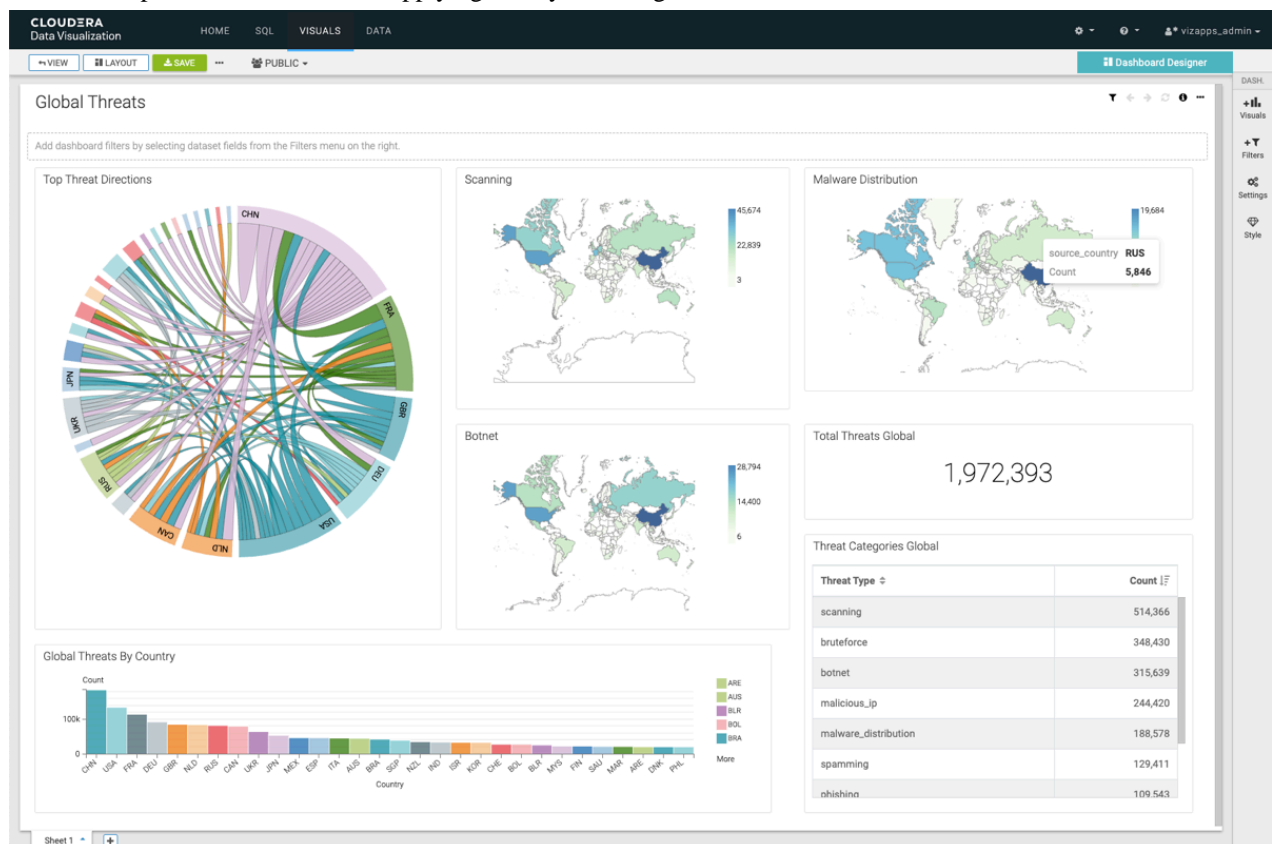
This is the new dashboard layout after rearranging and resizing the widgets representing the visuals in the dashboard:

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

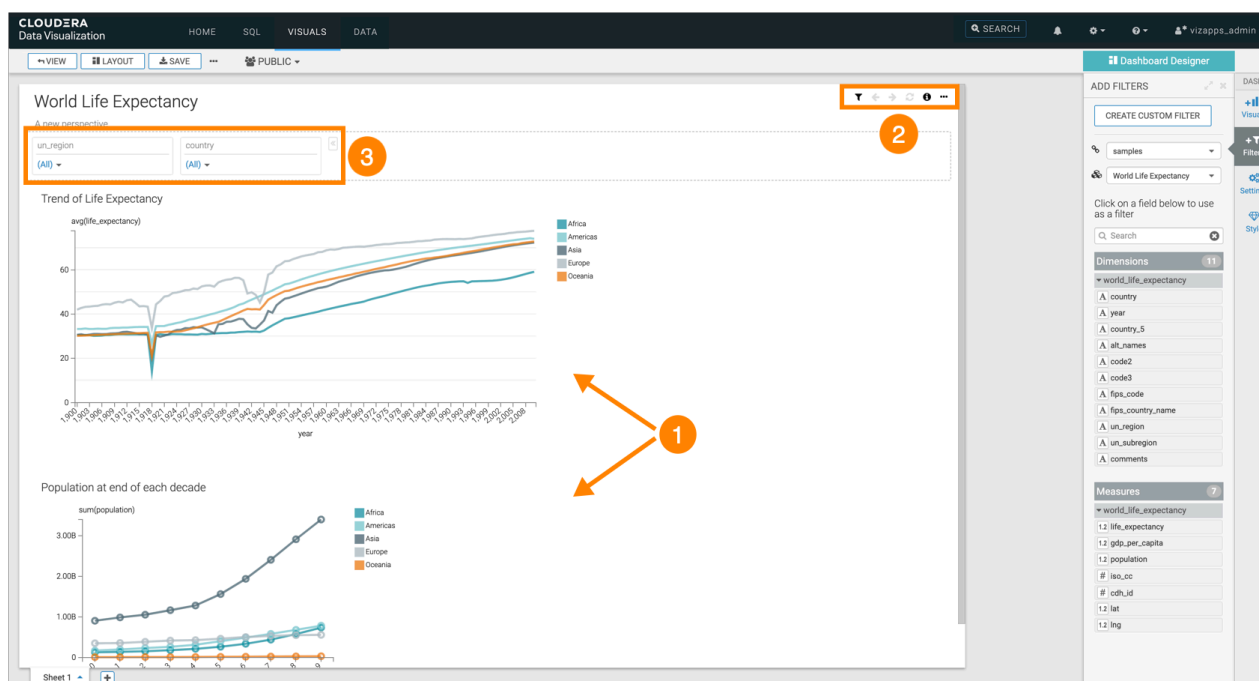
A Cloudera Data Visualization dashboard is a collection of multiple visuals. You can access existing dashboards on the VISUALS interface and open them in either View or Edit mode. If a dashboard is loading slowly, a notification is displayed. This data load message provides a link to the Profile Data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

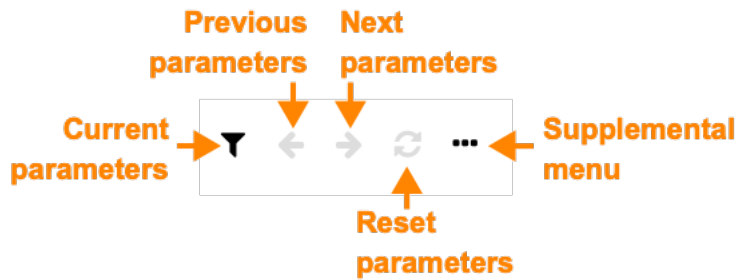
1. Visuals displayed on the dashboard
2. Dashboard controls
3. Filters (if added)



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:

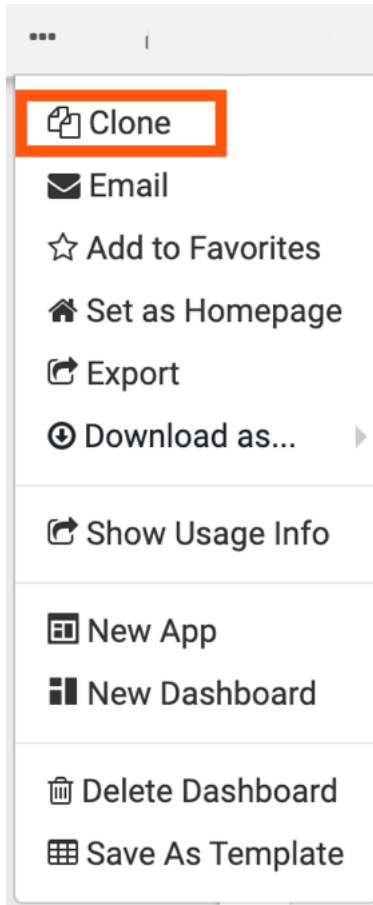
- Open it in View mode and click EDIT in the top-left corner.
- On the VISUALS interface, hover over the dashboard tile and click  in the bottom-right corner.

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

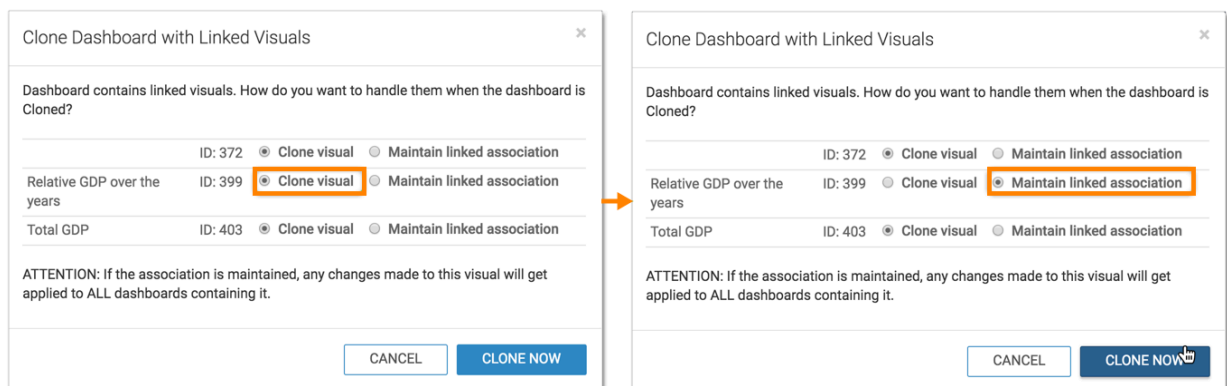
1. In the Dashboard Designer top menu bar, click  to open the supplemental menu and select Clone.



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 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

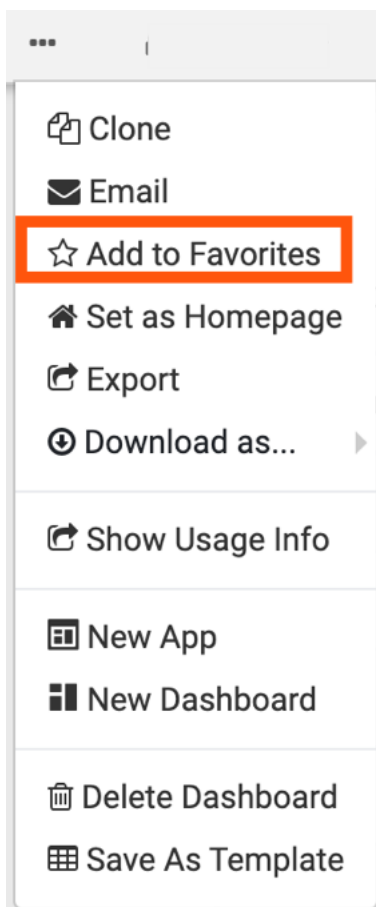
In Cloudera Data Visualization, you can mark your frequently used dashboards as favorites. These bookmarks make it easy to find your most-used content in a subsequent work session

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

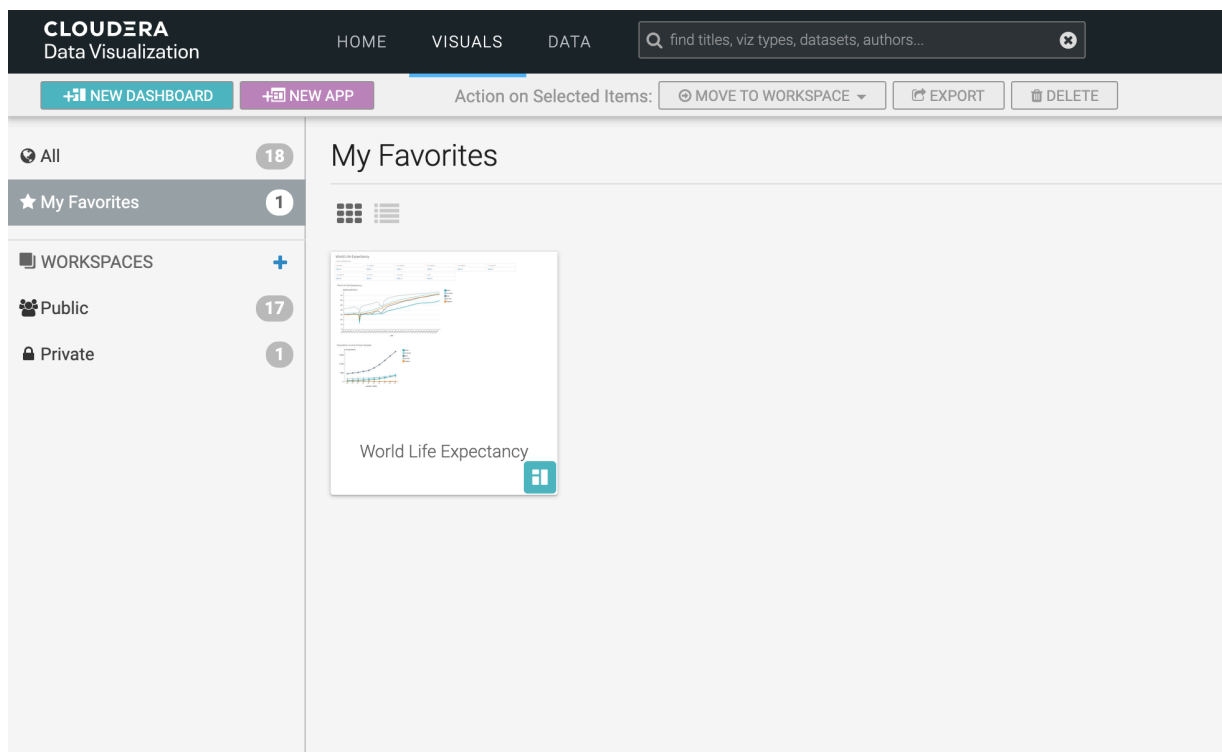
1. In the Dashboard Designer top menu bar, click **...** to open the supplemental menu and select Add to Favorites.



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 Cloudera Data Visualization.

Favorites is a toggle setting. In the Dashboard Designer top menu bar, click **...** 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. In the Dashboard Designer top menu bar, click **...** to open the supplemental menu and select Set as Homepage.

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 homage is displayed.


Getting the dashboard URL

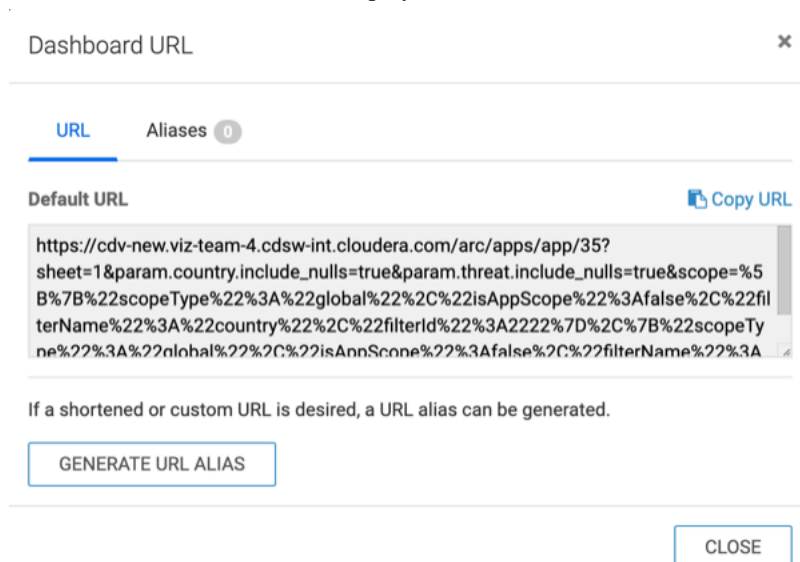
Cloudera Data Visualization enables you to share a dashboard by providing a direct link to it. You can share the default URL of the dashboard or use a short version of the link. You also have the option to customize the short URL, which allows you to use more descriptive and more readable/memorable links. 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  in the top right corner of the dashboard to open the supplemental menu and click Get URL. The Dashboard URL modal 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.cds-int.cloudera.com/arc/apps/app/35?sheet=1&param.country.include_nulls=true&param.threat.include_nulls=true&scope=%5B%7B%22scopeType%22%3A%22global%22%2C%22isAppScope%22%3Afalse%22%22filterName%22%3A%22country%22%2C%22filterId%22%3A%22%22%22%2C%22scopeType%22%3A%22global%22%2C%22isAppScope%22%3Afalse%22%22filterName%22%3A
```

URL Alias Copy URL

https://cdv-new.viz-team-4.cds-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

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

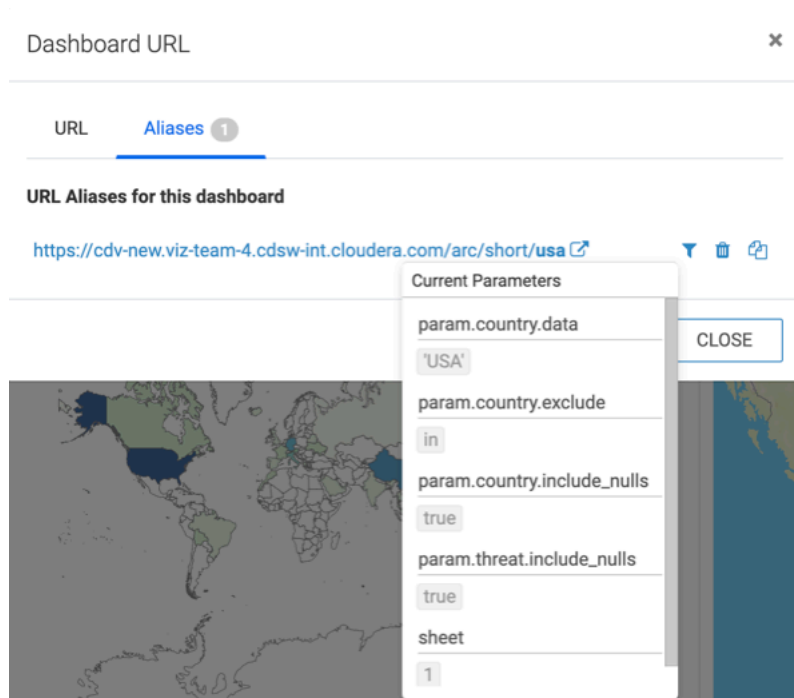
It lists all short URLs created for the dashboard.

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

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

- e. 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*.

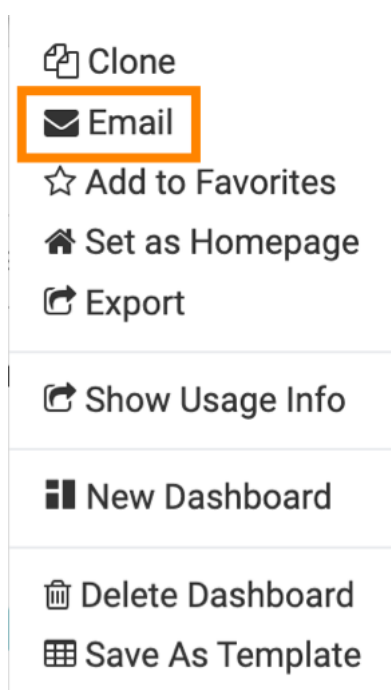


Note: You can only email one dashboard sheet at a time, but if you have more sheets on your dashboard, you can repeat this procedure for each sheet.

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  to open the supplemental menu and select Email.



The Send sheet modal 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 versions of the 'Send sheet' dialog box. The left version has the 'Email now' tab selected, showing fields for 'To', 'CC', 'From' (with a dropdown showing 'vizapps_admin<viztest00@gmail.com>'), 'Subject' (with a dropdown showing '[Cloudera Data Visualization]'), 'Email Template' (with a dropdown showing 'Default Email Template'), 'Message' (with a text area), and 'Attach' (with checkboxes for 'Embedded Image', 'PNG', 'PDF', 'XLSX', and 'CSV'). The right version has the 'Schedule email' tab selected, showing fields for 'Name' and 'Schedule' (with a dropdown showing 'No Scheduling'), and buttons for 'Cancel' and 'Save'.

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 allows you to save a dashboard in different file formats.

Downloading a dashboard sheet as a PNG file

Cloudera Data Visualization allows you to download the current sheet of a dashboard as a PNG image for sharing or offline viewing. The name of the exported file reflects the name of the dashboard and includes a timestamp indicating when the file was created.

About this task

Cloudera recommends this built-in download rather than using desktop screenshot tools because this method properly captures visuals that are very wide, very long, or extend beyond the visible screen area.



Note:

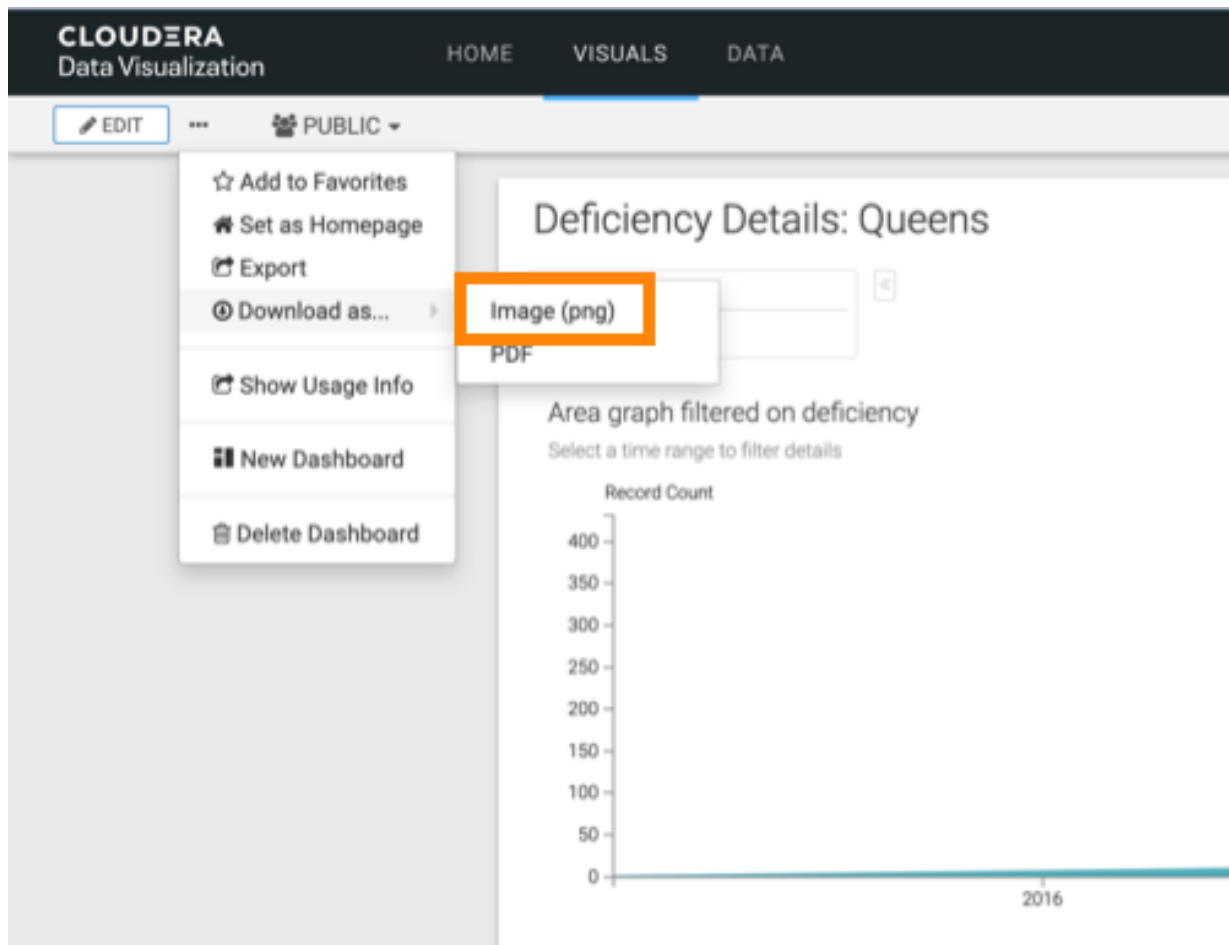
- Custom JavaScript visual snapshots are supported only if written in ECMAScript 5.
- PNG download is not supported on Windows platforms.

Before you begin

Before you download the dashboard as a PNG file, make sure the download feature is enabled in site settings. For instructions, see [Snapshots in Managing dashboard site settings](#).

Procedure

1. In the Dashboard Designer top menu bar, click **...** to open the supplemental menu.
2. Click **Download as... Image (png)**.



A message appears: Generating the requested file and Cloudera Data Visualization saves the sheet as a PNG file.

You can reach the same action using the **...** icon in the top-right corner of the dashboard.

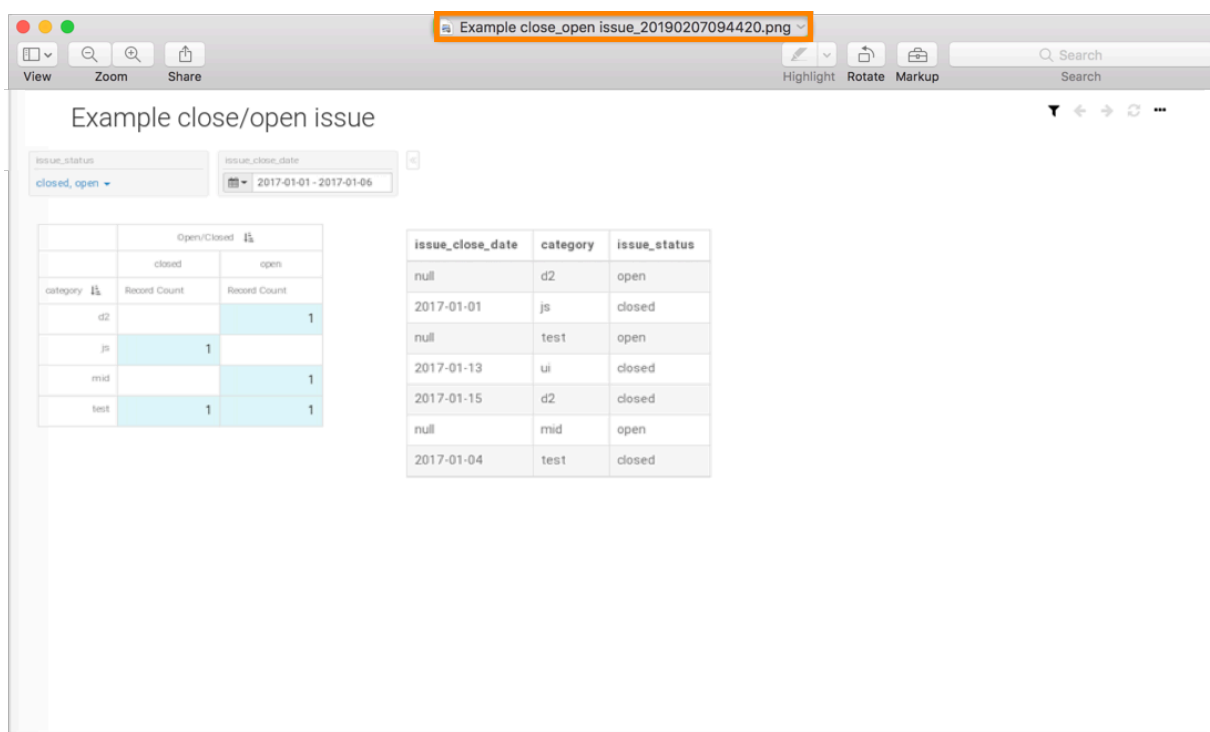
3. When the download is complete, open your browser's default download folder.

For example, the generated filename, Example close_open issue_20250707094420.png, has the following components:

- Example close_open issue: Same name as the dashboard
- 20250707: Date of download in YYYYMMDD format
- 094420: Time of download in hhmmss format

If the dashboard name contains characters not supported by your file system (for example slashes), Cloudera Data Visualization replaces them automatically. For example:

- Original visual name: Example close/open issue
- Generated file name: Example close open issue_xxxxxxxxxxxxx.png (Forward slash / is replaced with a space.)



Downloading dashboards and sheets as PDF files

Cloudera Data Visualization allows you to save your dashboards and individuals sheets as PDF files. The name of the exported file reflects the name of the dashboard and includes a timestamp indicating when the file was created.

About this task



Note:

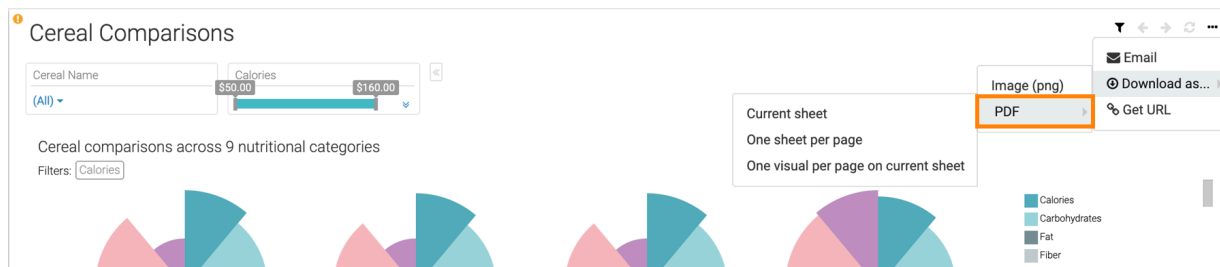
- Custom JavaScript visual snapshots are supported only if written in ECMAScript 5.
- PDF download is not supported on Windows platforms.

Before you begin

Before you download the dashboard as a PDF file, make sure the download feature is enabled in site settings. For instructions, see [Snapshots in Managing dashboard site settings](#).

Procedure

1. Open the dashboard and click **...** in the top-right corner of the dashboard to open the supplemental menu.
2. Click **Download as... PDF**.



You can also reach the download action from the top-left corner of the Dashboard Designer interface.

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

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

Downloading current sheet as a PDF file

Cloudera Data Visualization allows you to download the current sheet of a dashboard as a PDF file, with all visuals in the current sheet included on a single page. This is useful for sharing or archiving snapshots of individual sheets.

About this task



Note:

- Custom JavaScript visual snapshots are supported only if written in ECMAScript 5.
- For filtered visuals, the filter must have application (app) scope.
- PDF download is not supported on Windows platforms.

In the following example, you can see how to download the current sheet (sheet 1) of the dashboard.

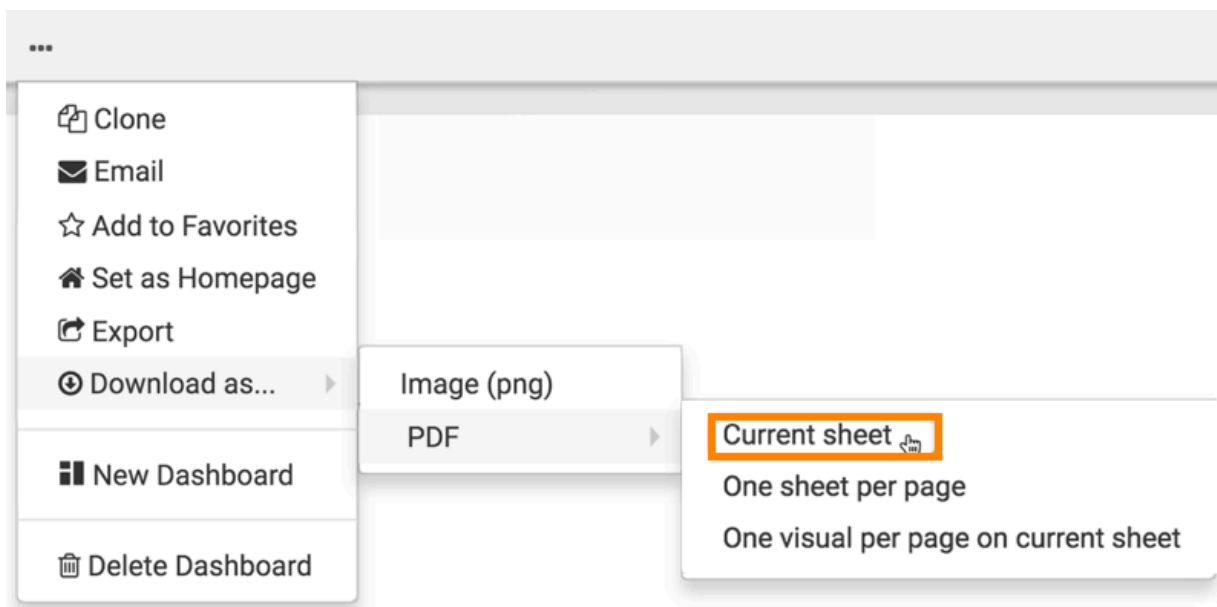
Before you begin

Before you download the sheet as a PDF file, make sure the download feature is enabled in site settings. For instructions, see [Snapshots in Managing dashboard site settings](#).

Procedure

1. Open the dashboard and click **...** in the top-right corner of the dashboard to open the supplemental menu.

2. Click Download as... PDF Current Sheet .



This action initiates the download of the active sheet and a message appears: Generating the requested file. Cloudera Data Visualization saves the current sheet of the dashboard as a PDF file.

You can reach the same action using the **...** icon in the Dashboard Designer top menu bar.

3. When the download is complete, open your browser's default download folder.

In this example, the generated filename, PDF Export_20250205135933.pdf, has the following components:

- PDF Export: Same as the visual name
- 20250205: Date of download in YYYYMMDD format
- 135933: Time of download in hhmmss format

If the sheet name contains characters not supported by your file system (for example slashes), Cloudera Data Visualization replaces them automatically. For example:

- Original sheet name: PDF/Export
- Generated file name: PDF Export_20250205135933.pdf (Forward slash / is replaced with a space.)

Downloading all sheets as one PDF file

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

About this task



Note:

- Custom JavaScript visual snapshots are supported only if written in ECMAScript 5.
- PDF download is not supported on Windows platforms.

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

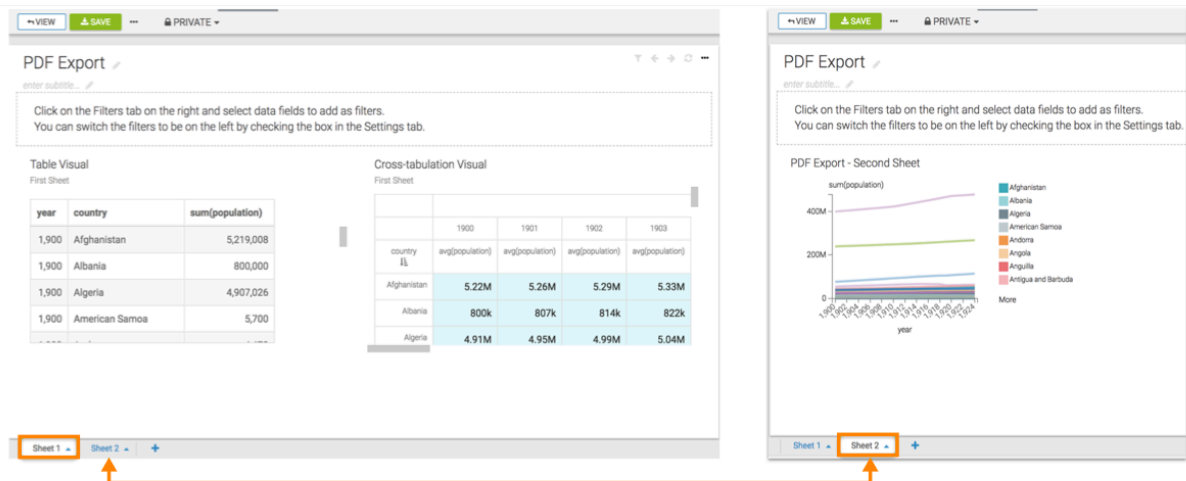
Before you begin

Before you download the dashboard as a PDF file, make sure the download feature is enabled in site settings. For instructions, see [Snapshots in Managing dashboard site settings](#).

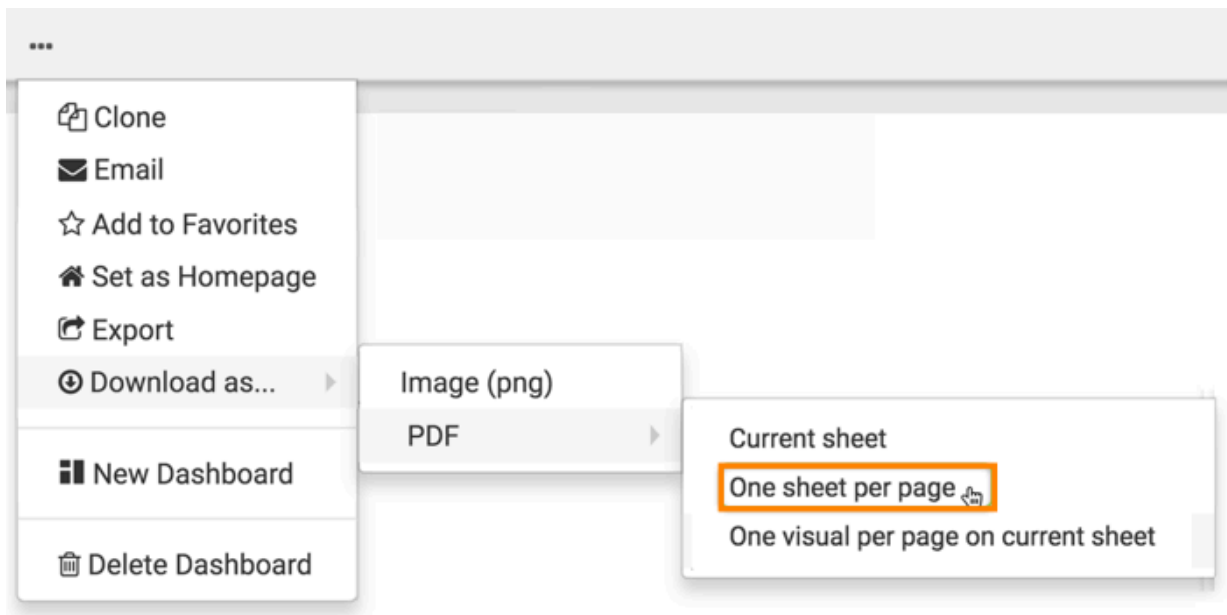
Procedure

1. Open the dashboard.

In this example, the PDF Export dashboard has two sheets.



2. Click **...** in the top-right corner of the dashboard to open the supplemental menu and select **Download as... PDF** One sheet per page .



This action initiates the download of the dashboard and a message appears: Generating the requested file. Cloudera Data Visualization saves the dashboard sheets to a multi-page PDF file, with each sheet on a separate page in the output.

3. When the download is complete, open your browser's default download folder.

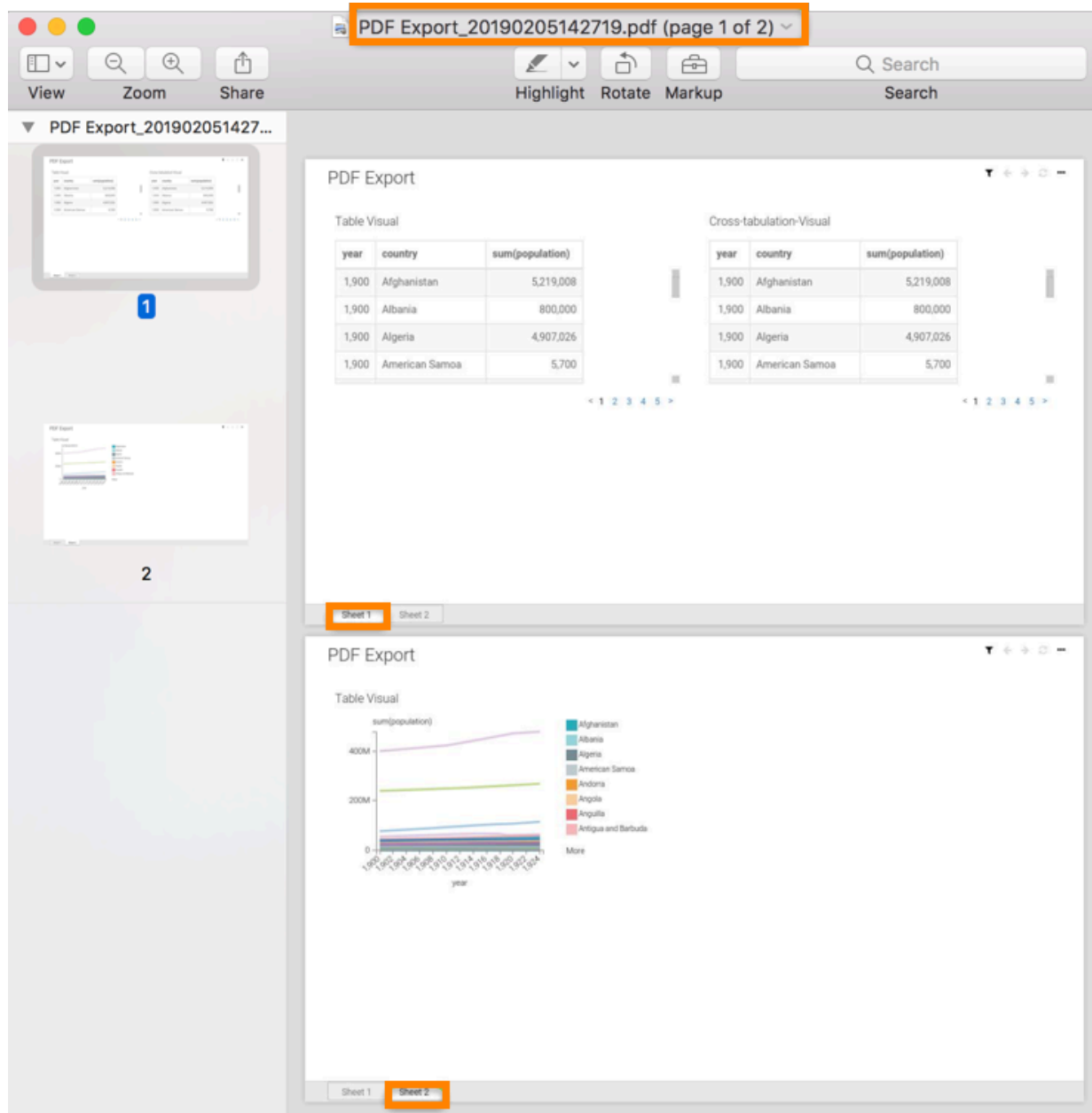
The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created. Each sheet of the dashboard is on a separate page.

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

- PDF Export: Same as the dashboard name
- 20190205: Date of download in YYYYMMDD format
- 142719: Time of download in hhmmss format

If the dashboard name contains characters not supported by your file system (for example slashes), Cloudera Data Visualization replaces them automatically. For example:

- Original dashboard name: PDF/Export
- Generated file name: PDF Export_20190205142719.pdf (Forward slash / is replaced with a space.)



Downloading current sheet as a PDF file with each visual on a separate page

Cloudera Data Visualization allows you to download the current sheet of a dashboard as a PDF file, with each visual from the sheet placed on a separate page. This is useful when you want to present visuals individually while preserving the context of the sheet.

About this task



Note:

- Custom JavaScript visual snapshots are supported only if written in ECMAScript 5.
- PDF download is not supported on Windows platforms.

Before you begin

Before you download the dashboard as a PDF file, make sure the download feature is enabled in site settings. For instructions, see [Snapshots in Managing dashboard site settings](#).

Procedure

1. Open the dashboard.

In this example, Sheet 1 of the PDF Export dashboard has two visuals.

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 tab.

Table Visual
First Sheet

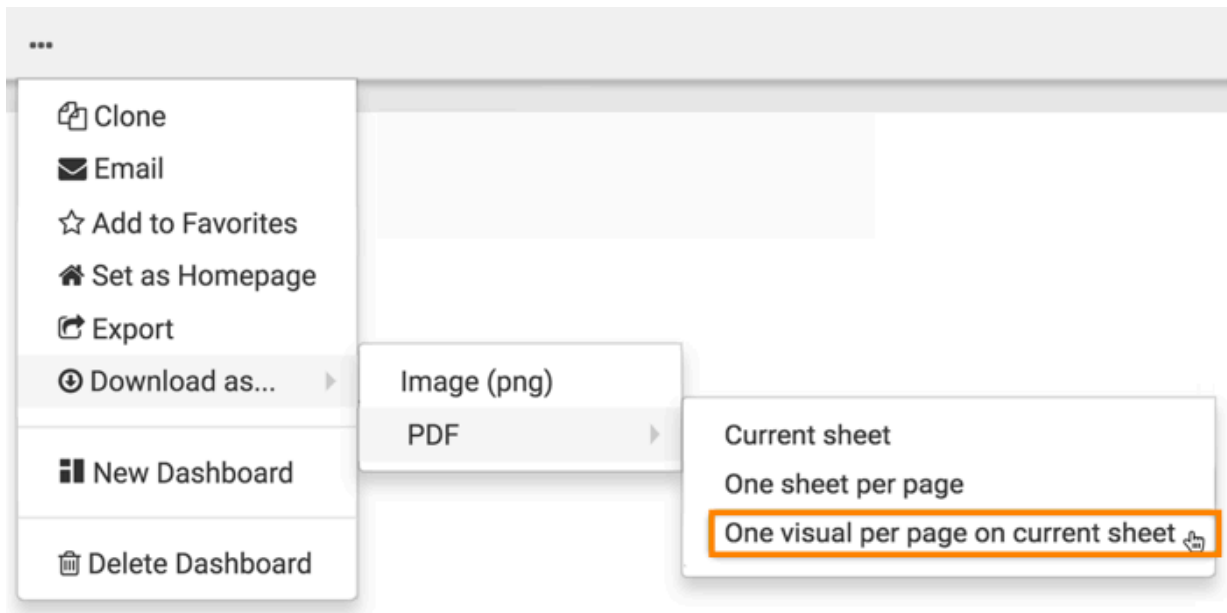
year	country	sum(population)
1,900	Afghanistan	5,219,008
1,900	Albania	800,000
1,900	Algeria	4,907,026
1,900	American Samoa	5,700

Cross-tabulation Visual
First Sheet

	1900	1901	1902	1903
country	avg(population)	avg(population)	avg(population)	avg(population)
Afghanistan	5.22M	5.26M	5.29M	5.33M
Albania	800k	807k	814k	822k
Algeria	4.91M	4.95M	4.99M	5.04M

Sheet 1 Sheet 2 +

2. Click **...** in the top-right corner of the dashboard to open the supplemental menu and select **Download as... PDF** **One visual per page on current sheet**.



This action initiates the download of the current sheet and a message appears: Generating the requested file. Cloudera Data Visualization saves the sheet as a multi-page PDF file, including each visual on a separate page in the output.

3. When the download is complete, open your browser's default download folder.

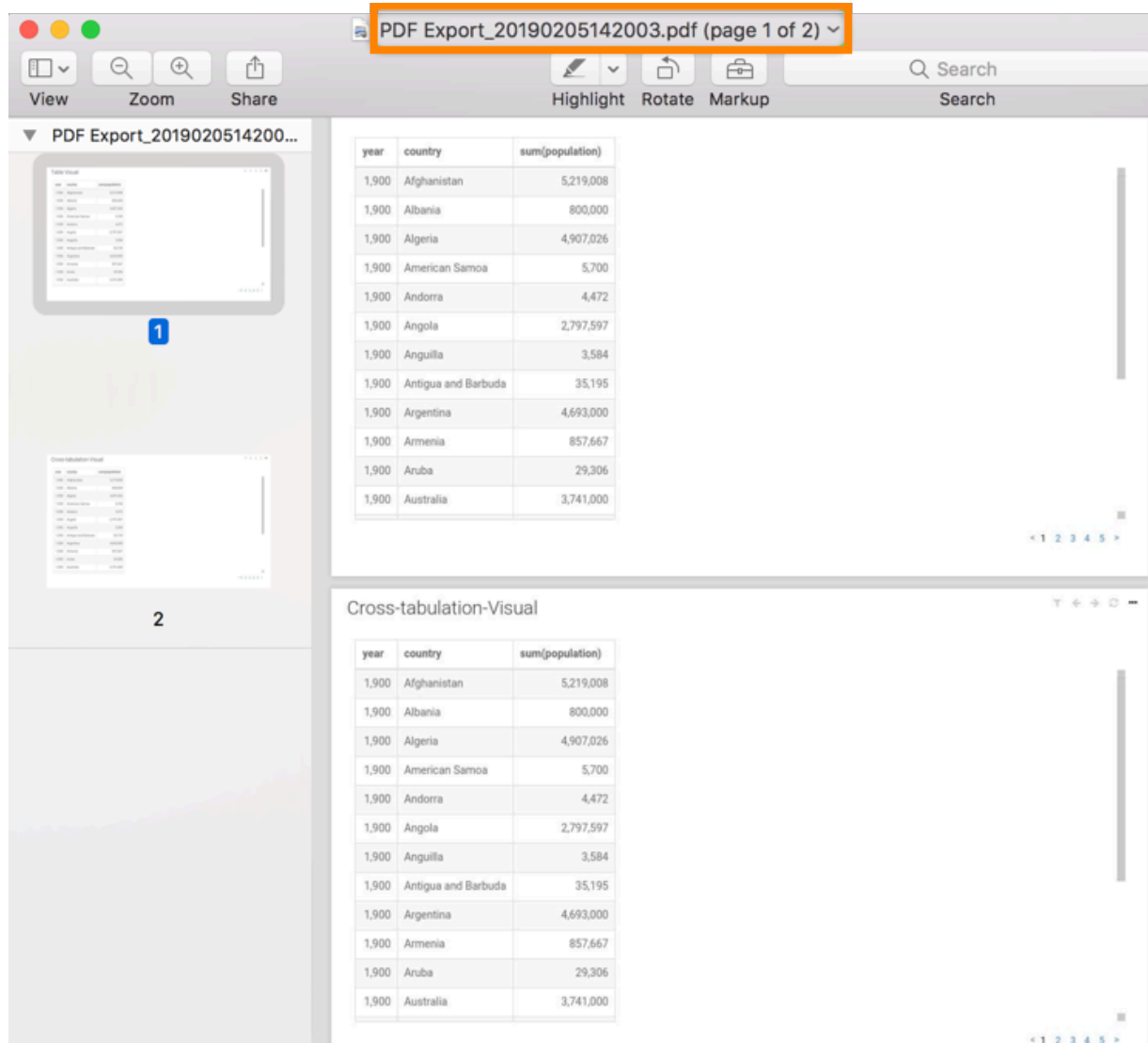
The filename is the same as the name of the dashboard, and it has a timestamp specifying the date and time when the file is created. Each visual of the dashboard sheet is on a separate page.

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

- PDF Export: Same as the dashboard name
- 20190205: Date of download in YYYYMMDD format
- 142003: Time of download in hhmmss format

If the dashboard name contains characters not supported by your file system (for example slashes), Cloudera Data Visualization replaces them automatically. For example:

- Original sheet name: PDF/Export
- Generated file name: PDF Export_20190205142003.pdf (Forward slash / is replaced with a space.)



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.

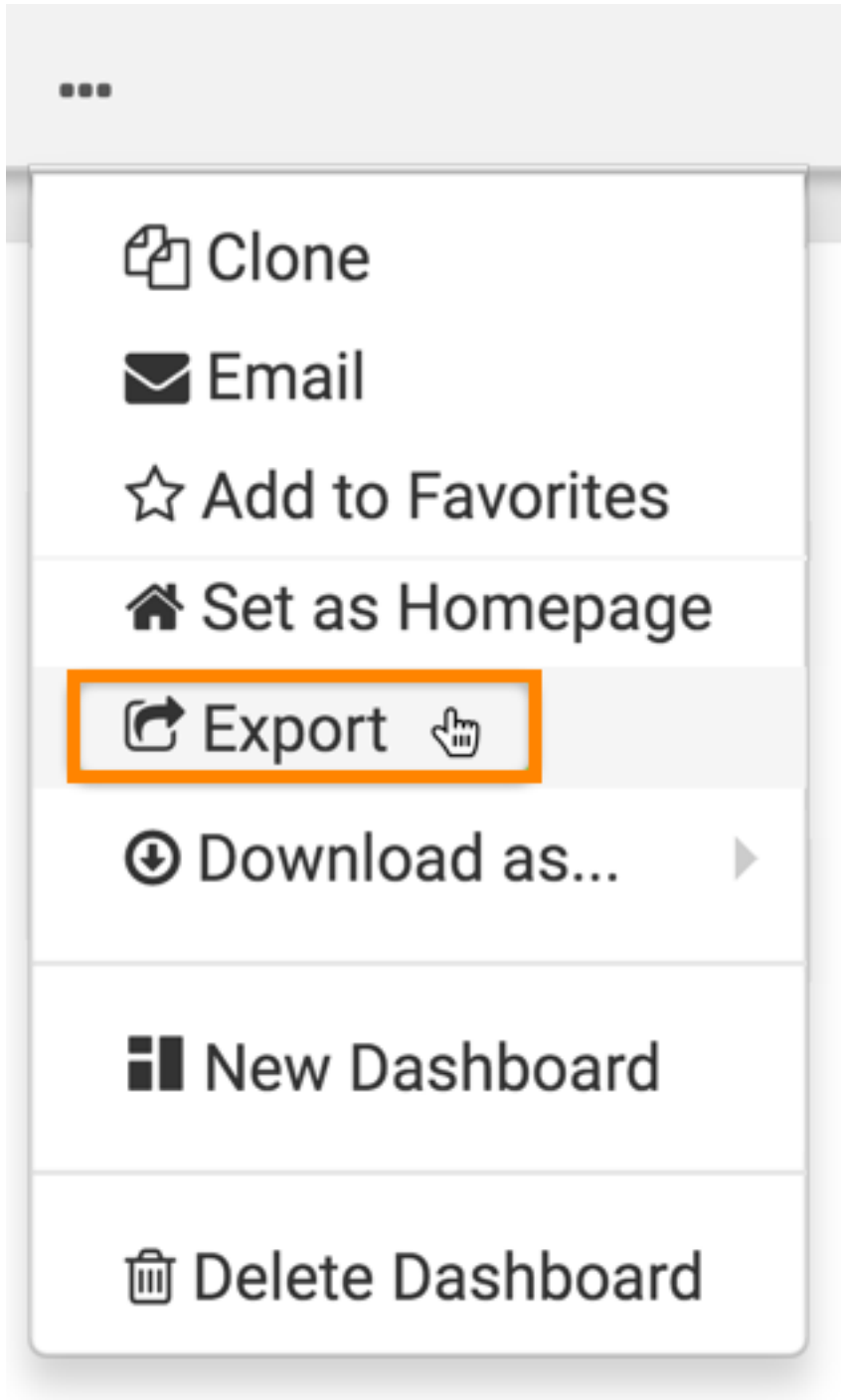


Note: You need the Manage visuals and dashboards privilege to export visual artifacts.

Procedure

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

2. Click  from the top menu bar to open the supplemental menu and click Export.



The Export Visual Artifacts modal 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

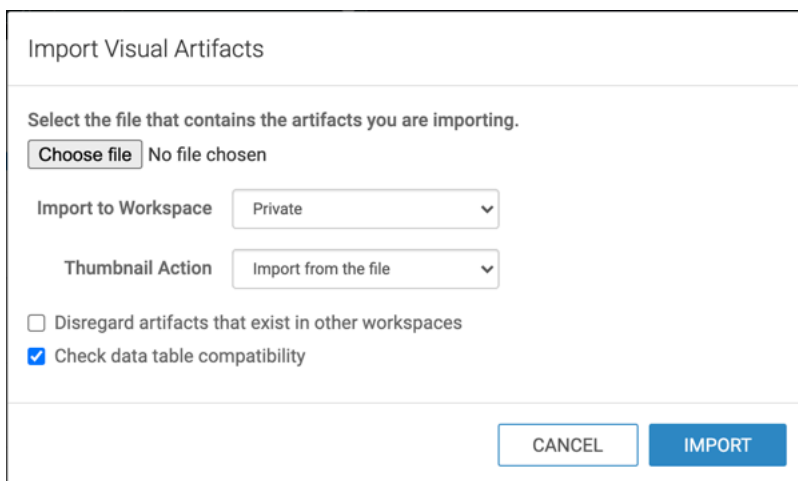
In Cloudera Data Visualization, you can import visuals, dashboards and other visual artifacts exported from another system. You can use the migration utility to port these artifacts from development/testing environments to production deployments or for creating back-ups. All you need is the appropriate 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. Click **...** from the top menu bar to open the supplemental menu and click Export.
3. Select the connection where you want to import the artifacts.

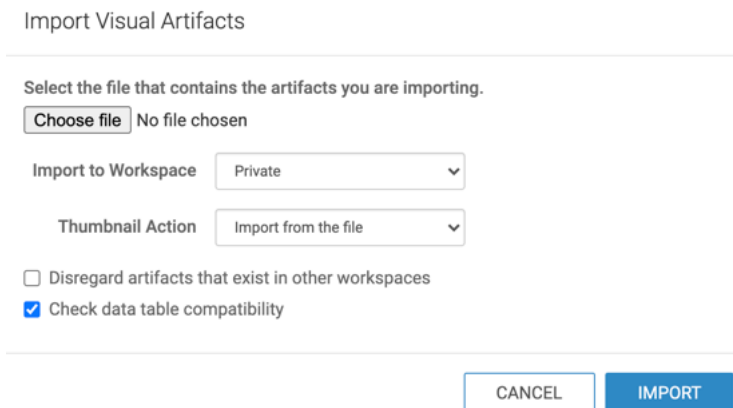
In this example, the Samples connection has been selected showing connecting to the same data source for both systems.

4. At the top of the screen, click **...** to open the supplemental menu and select Import Visual Artifacts.



The screenshot shows a modal dialog titled "Import Visual Artifacts". Inside, there is a section "Select the file that contains the artifacts you are importing." with a "Choose file" button and the text "No file chosen". Below this are two dropdown menus: "Import to Workspace" set to "Private" and "Thumbnail Action" set to "Import from the file". There are two checkboxes: "Disregard artifacts that exist in other workspaces" (unchecked) and "Check data table compatibility" (checked). At the bottom right are "CANCEL" and "IMPORT" buttons.

The Import Visual Artifacts modal appears.

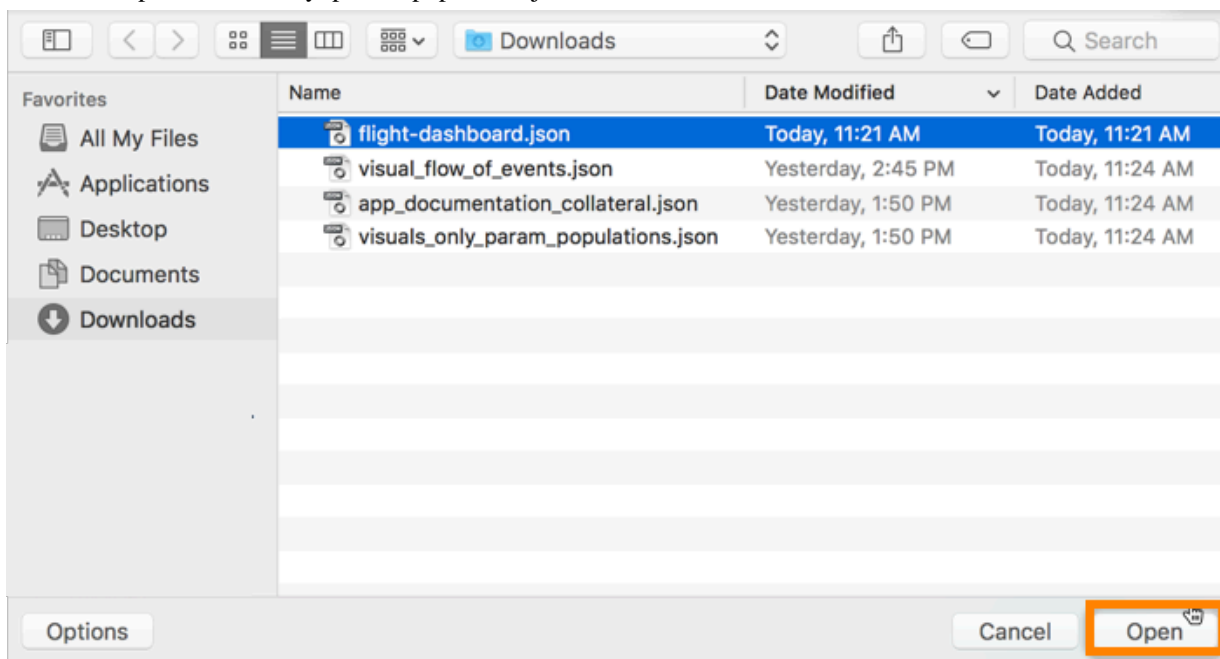


This is another screenshot of the same "Import Visual Artifacts" modal dialog, showing the same fields and options as the previous one: "Choose file" button, "No file chosen" text, "Import to Workspace" dropdown (Private), "Thumbnail Action" dropdown (Import from the file), "Disregard artifacts that exist in other workspaces" (unchecked), "Check data table compatibility" (checked), and "CANCEL" and "IMPORT" buttons.

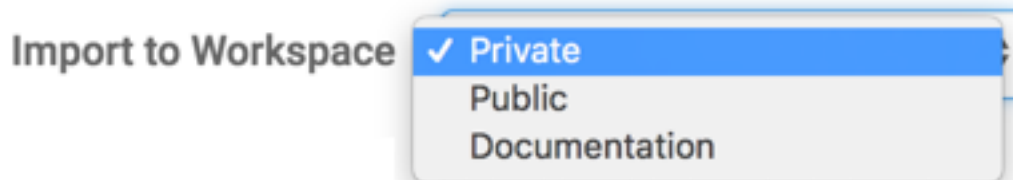
5. Click Choose File.

6. Select the file you want to import.

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



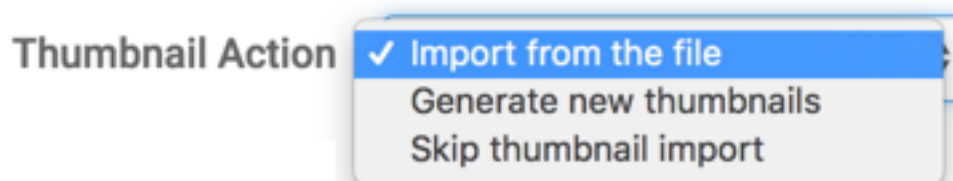
7. Specify the destination workspace in the Import to Workspace drop-down menu.



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

8. 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.

9. 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.

10. 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.

11. 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.

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	-

12. 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.

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](#)

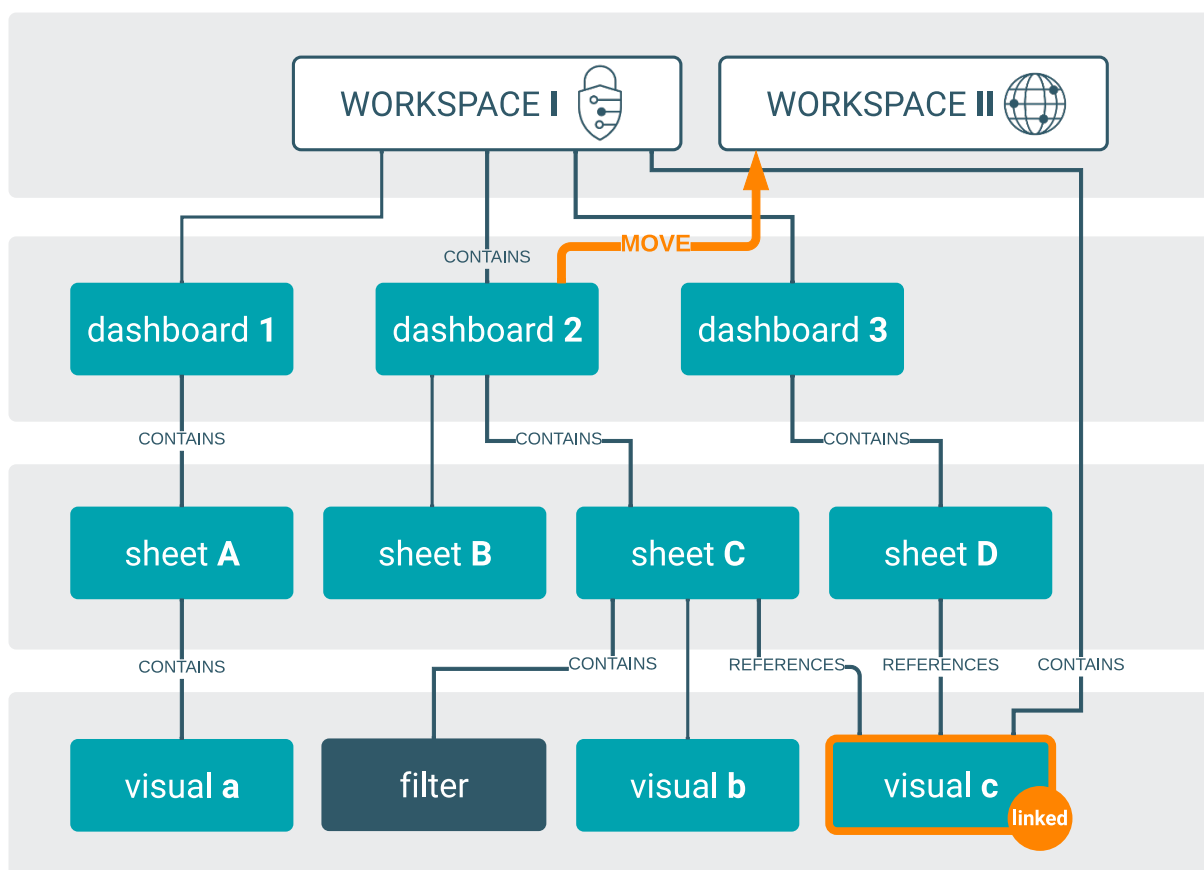
[Exporting and importing visual artifacts](#)

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.

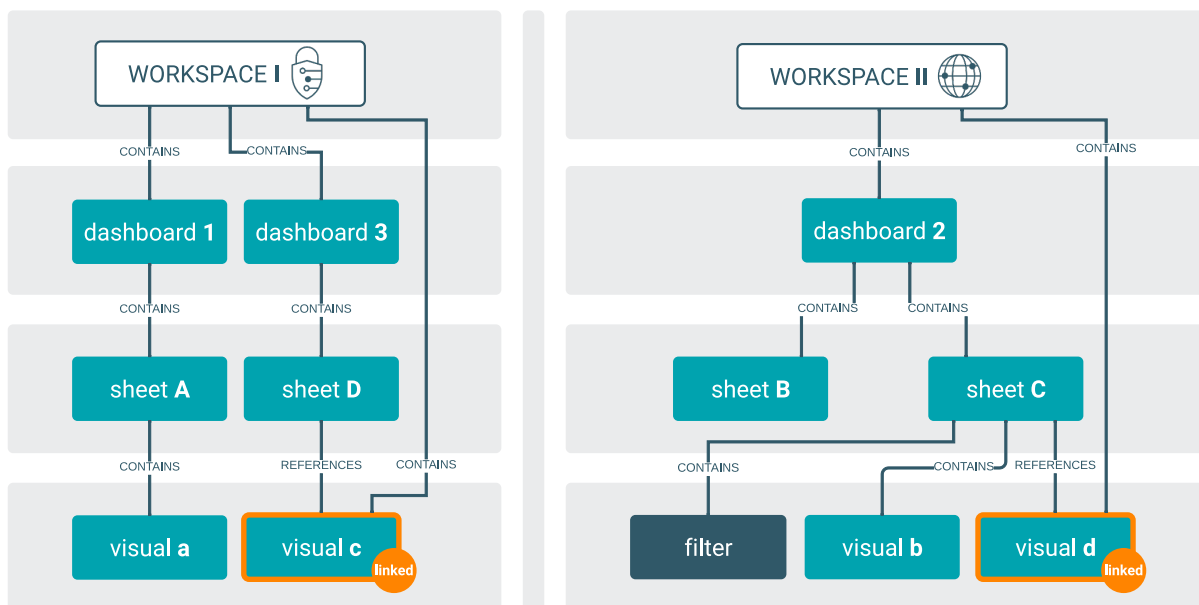
When the dashboard you are moving contains a linked visual that is used by another dashboard in the workspace, you have two options: to clone it or to move it. For more information on what happens in each case, see the following diagram. In this example, dashboard 2 is moved from WORKSPACE I (private)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

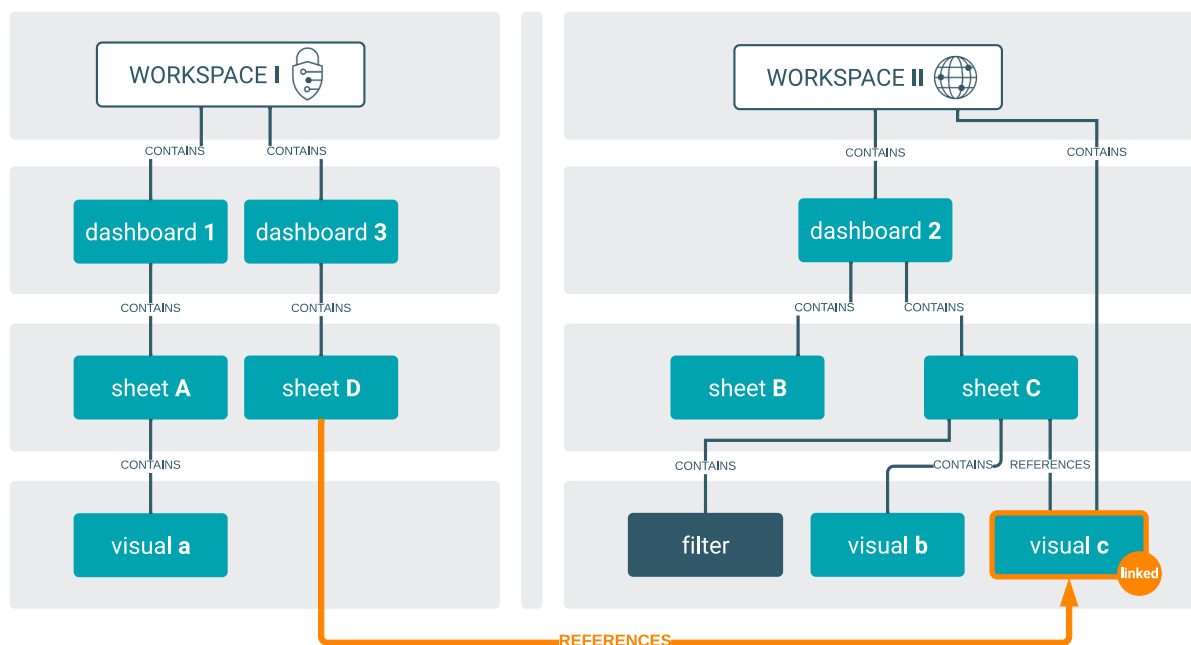
Visual c is a linked visual artifact on dashboard 3 of WORKSPACE I. If you clone visual c, you create a new visual (visual d) in WORKSPACE II. The new visual d is also linked. Dashboard 3 in WORKSPACE I remains unchanged: visual c is still there, and it is still a linked visual.



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.

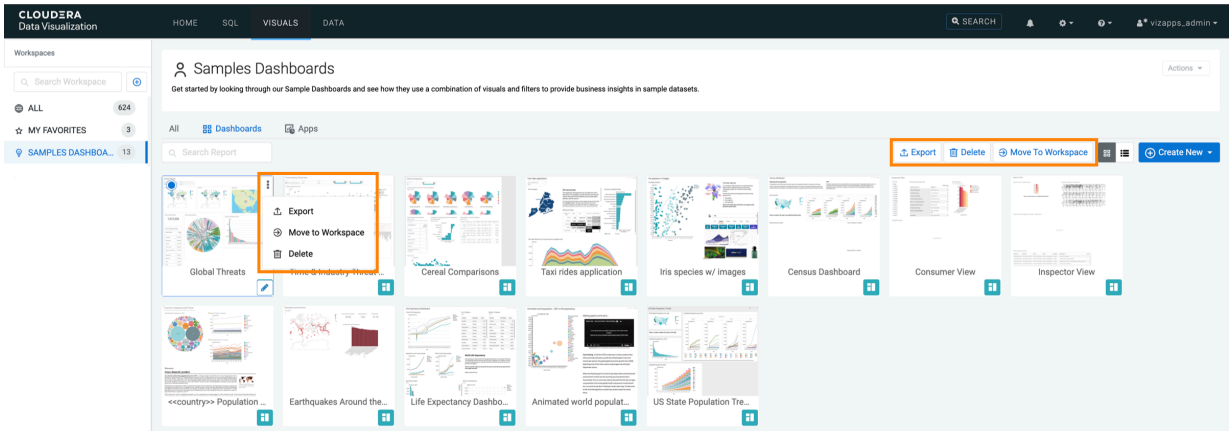
On the VISUALS interface

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: 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

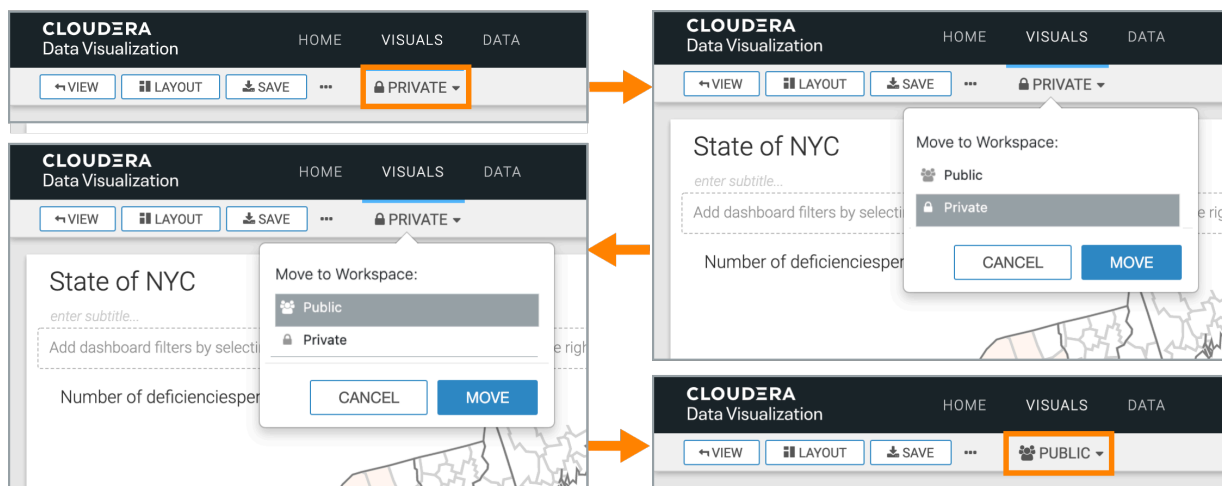
2. Set the new workspace from the drop-down list and click Move.

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.

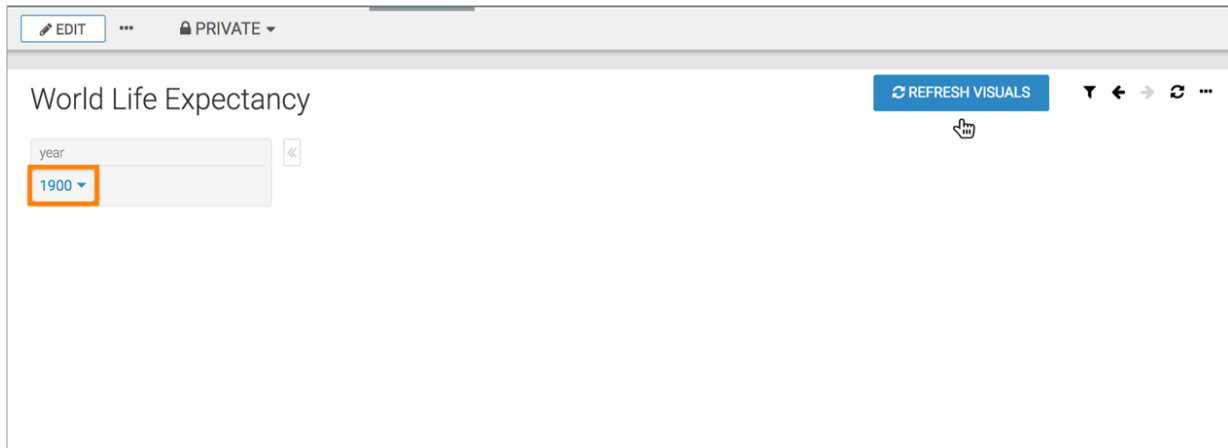


This adds a REFRESH VISUALS button to the dashboard.

- 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.

country	year	life_expectancy	gdp_per_capita
Afghanistan	1,900	27.2000007629	61
Albania	1,900	35.4000015259	1,048.3000488
Algeria	1,900	28.8999996185	1,787.4000244
American Samoa	1,900		874.20001220
Andorra	1,900		3,313.6000976

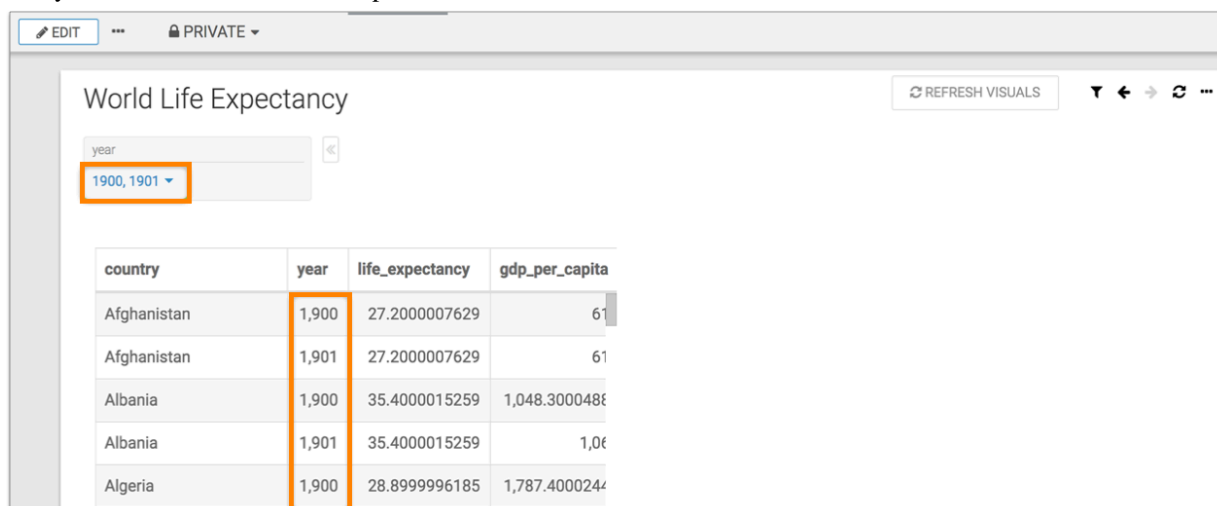
9. Add the year 1901 to the filter.

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.

country	year	life_expectancy	gdp_per_capita	popi
Afghanistan	1,900	27.2000007629	612	
Albania	1,900	35.4000015259	1,048.30004883	
Algeria	1,900	28.8999996185	1,787.40002441	
American Samoa	1,900		874.200012207	
Andorra	1,900		3,313.60009766	

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

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

Creating annotation for dashboards [Technical Preview]

Annotations are brief summaries or description that you can associate with a visual or dashboard. You can use them to clarify data details, highlight outlier values, or provide additional context for visual consumers. The annotations feature (currently in Technical Preview) supports both manually written descriptions and AI-generated summaries based on the data displayed in a visual.

How annotations appear

If a dashboard has no annotation:

- In View mode, the Annotation icon (📄) is hidden.
- In Edit mode, the Annotation icon is visible. Clicking it displays a message indicating that no annotations have been added yet, and provides the Edit option for adding an annotation.

If a dashboard has an annotation:

- In View mode, the Annotation icon is visible. Clicking it displays the annotation.
- In Edit mode, the Annotation icon is visible. Clicking it displays the annotation, and provides the Edit option for editing the annotation.


Before you begin

- You can create or edit annotations only in Edit mode.
- To use AI-powered summarization, enable AI features and AI summary in Site Settings. If these are not enabled, only manual annotations can be created. For more information on these settings, see [Managing AI settings](#).

Creating an AI-powered annotation

With AI-powered summarization, the system analyzes the visual and automatically generates a concise summary for you. The AI annotation leverages generative AI to simplify the interpretation of complex dashboards.

1. Open a dashboard in Edit mode.

2. Click  in the top-right corner of the dashboard and click Edit.

The Annotations modal is displayed.

3. Enable the Generate with AI toggle.


Information about the AI prompt is displayed.


4. Click View Prompt to review or edit the default AI prompt text.

You can also restore the default prompt if needed.


Annotations (Technical Preview)


Superstore Sales Analysis


 Generate with AI ☒

 **AI Prompt**

The AI will generate the summary based on this prompt, together with the report data and associated metadata (visual and dataset names).

[More Details](#) 

View Prompt 

 Generate with AI

Annotation

Annotation message...

Cancel

Save

5. Click Generate with AI.

The annotation is automatically generated and a Generated with AI label is added.




Important: If the dataset contains sensitive fields, a warning appears to inform you that sensitive fields are not sent to the AI, which may affect the annotation's accuracy.

Annotations (Technical Preview)

Superstore Sales Analysis

Generate with AI ☒

 **AI Prompt**

The AI will generate the summary based on this prompt, together with the report data and associated metadata (visual and dataset names).

[More Details](#) ▾

[View Prompt](#) ▾

Generate with AI

Annotation Generated with AI

The "Superstore Sales Analysis" dashboard provides a comprehensive view of the company's sales performance and shipping duration. A table consolidates total sales, total profit, and average time taken to ship. Packed-bubbles and trellis-grouped bars visuals offer insights into regional sales and profit distribution. The Northwest Territories appears to be an exceptional

Cancel

Save

6. Review the generated annotation for accuracy.

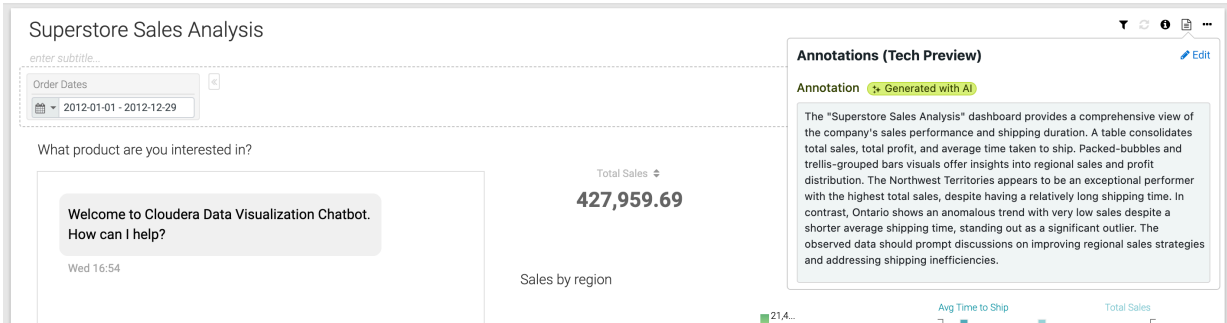


Note: AI-generated content may be inaccurate or misleading. Always verify the content.


7. [Optional] Edit the annotation text.

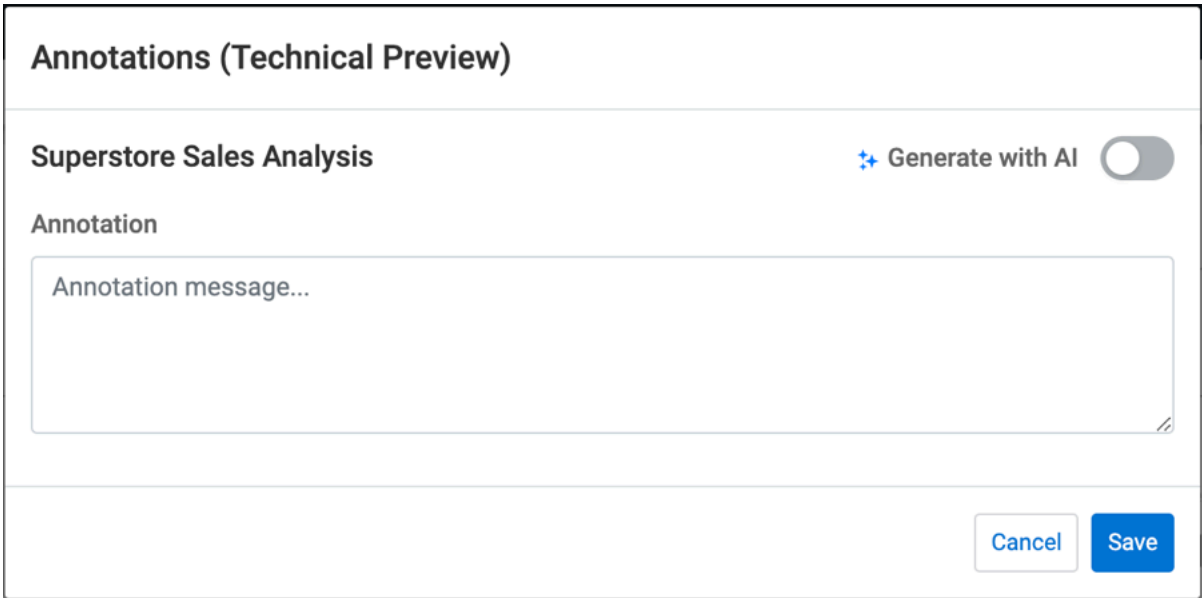
If you edit the text, the Generated with AI label is removed.

8. Click Save.

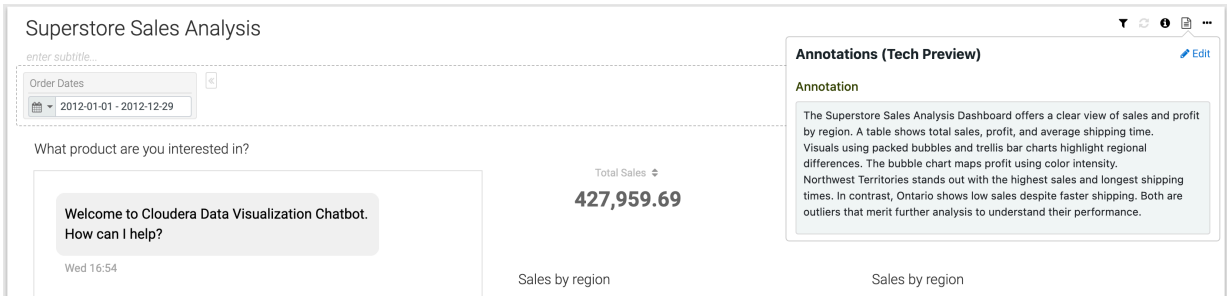


Creating a manual annotation

- 1. Open a dashboard in Edit mode.
- 2. Click  in the top-right corner of the dashboard and click Edit. The Annotations modal is displayed.



- 3. Enter your annotation text in the text box.
- 4. Click Save.



Commenting on visuals and dashboards [Technical Preview]

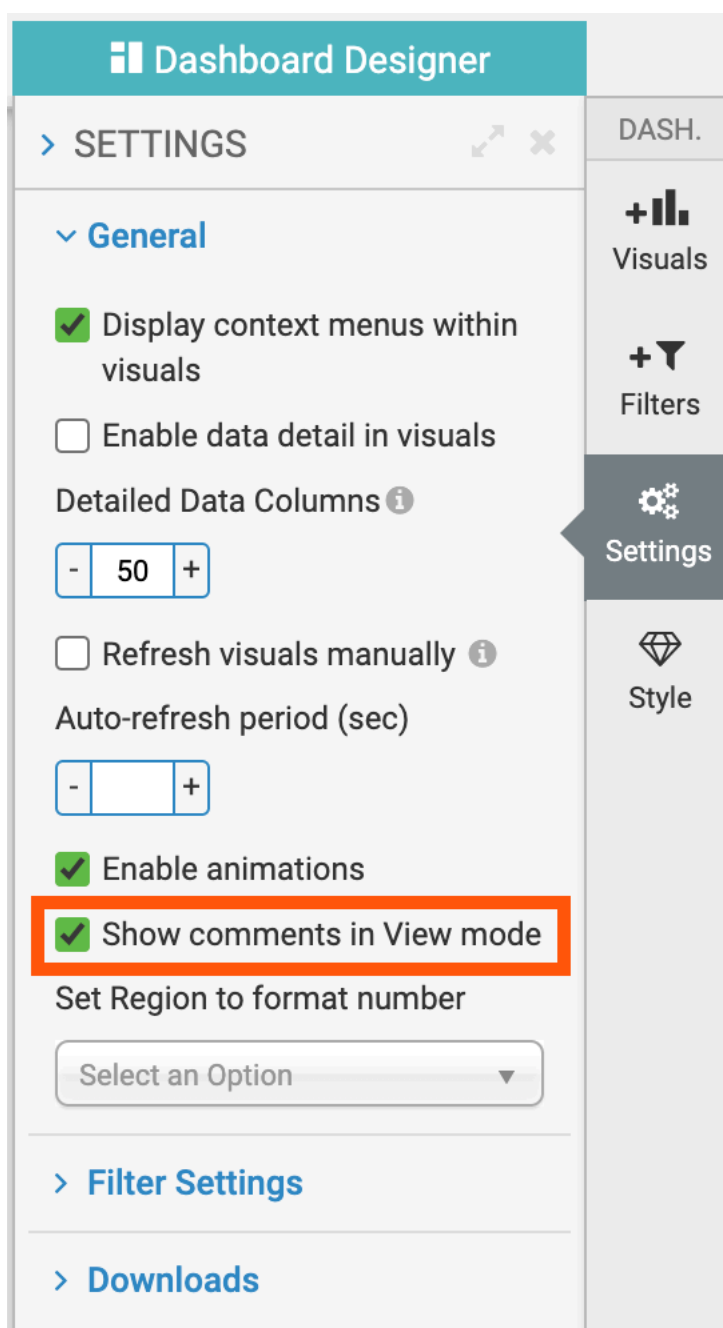
The Comments panel in Cloudera Data Visualization allows you to add feedback or insights and ask questions directly within dashboards and visuals. Comments can be added at either the dashboard level or the visual level, making it easier to share context-specific insights.

About this task




Commenting makes collaboration with other users easier by keeping discussions in context, without switching to external tools. Each comment includes the author and a timestamp, ensuring traceability and accountability. You can reply to the comments added by other users, so discussion threads keep conversations organized and easy to follow.

By default, commenting on visuals and dashboards is disabled. To use this feature, an administrator must first enable it in Site Settings. For details, see [Enable commenting](#).

When commenting is enabled, you can see and add comments in View mode or Edit mode. You can turn off showing comments in View mode in the general settings for dashboards. When comments are hidden, you cannot see existing comments or add new ones in View mode.

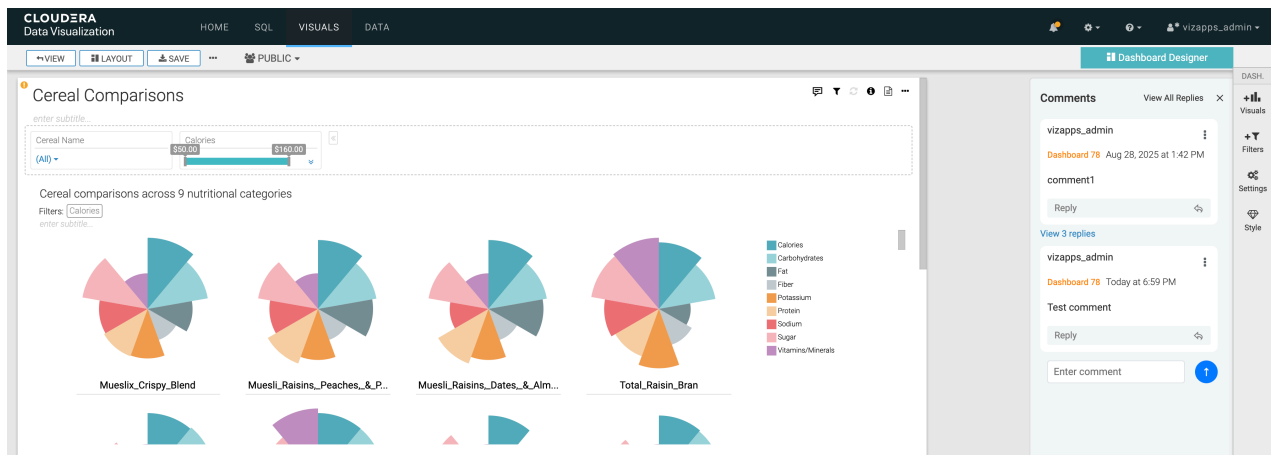


Opening the Comments panel

1. Open a dashboard in View or Edit mode.
2. Click  to open the Comments panel.
 - a. To comment on the dashboard, click  located at the top-right corner of the dashboard.
 - b. To comment on a specific visual, hover over the visual's top-right corner and click .

The Comments panel displays all comments associated with the selected dashboard or visual. If no comments exist, the panel shows No Comments Yet.


The Comments panel remains open until you manually close it.



Adding a comment to a dashboard or a visual

1. Open the Comments panel from the dashboard or the visual.
2. Type your message in the Enter comment field.
- 3.




Click  to submit the comment.

Each added comment shows:

- Author's username
- Related context (dashboard or visual id)
- Timestamp

Replying to comments

- Enter your response in the Reply field and click .
- Use View to expand a thread and Hide to collapse it.

Managing comments

From the More options (#) menu next to a comment, you can:

- Edit – Update the content of your own comment.
 - Comments and replies show an Edited badge and updated timestamp when modified, making it clear when feedback has changed.
- Mark as resolved – Mark the selected comment as resolved.
 - Only that specific comment is marked as resolved. Replies remain open and can be resolved individually.
 - Resolved comments cannot be edited or deleted, but they can be reopened.
 - Resolved comments are automatically moved to the bottom of the thread, keeping active discussions visible. If a resolved comment is reopened, it returns to its original position.
- Delete – Permanently remove a comment.
 - When you delete a comment, all replies are deleted as well.



Important: Only the comment owner or administrators can edit or delete comments.

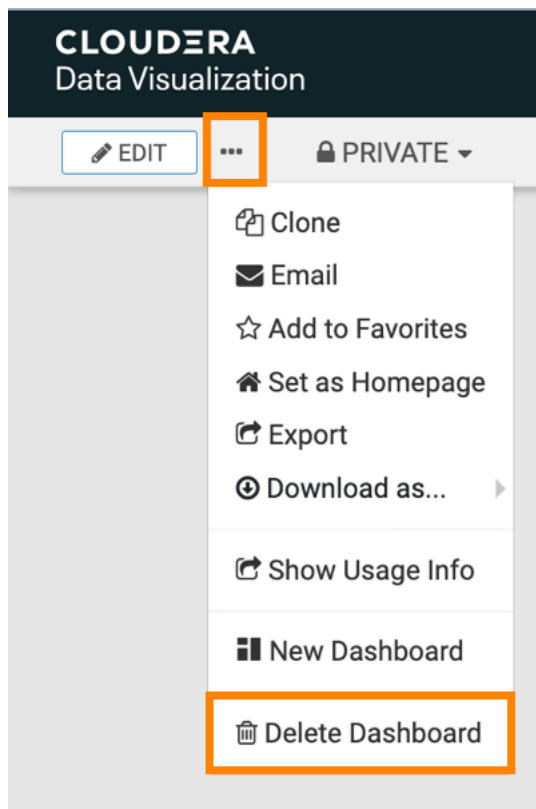
Deleting a dashboard

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

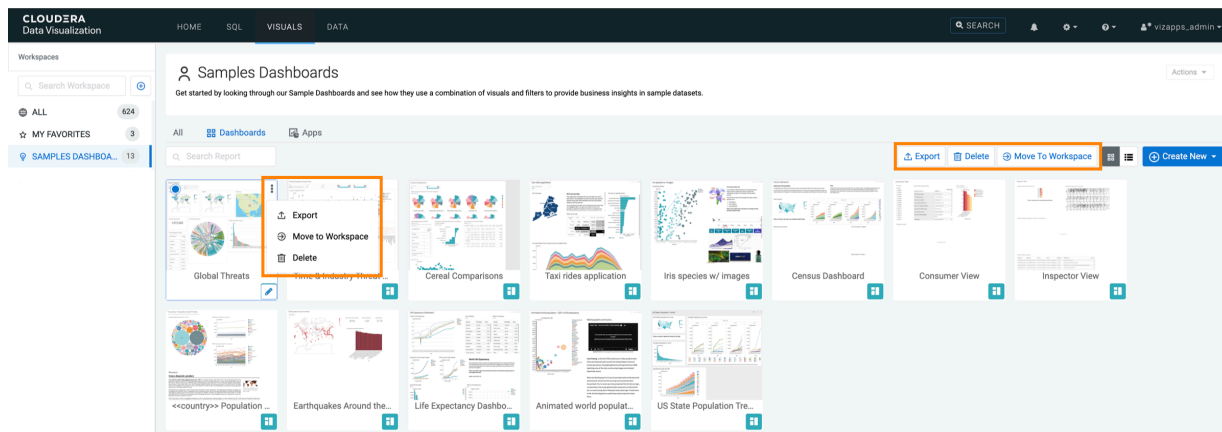
Procedure

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

2. Click **...** from the top menu bar to open the supplemental menu 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.