Cloudera Data Visualization 7.2.9

Managing Jobs

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Creating new email jobs

Cloudera Data Visualization supports two types of email jobs:

Immediate email

You can share existing visuals with other users on an ad-hoc basis using email.

About this task

Follow these steps to email a visual, a sheet, or a dashboard of your choice. You can accomplish this task either from Edit mode or from View mode.

Before you begin

You have the option to use an email template for this task, but it is not required. You can send the email as-is, without a message, or include your own custom message. If you decide to use a template, you can choose the default template or create a custom one. For guidance, see Creating new email templates.



Note: Only users with administrative privileges can create and manage email templates. For more information, see *Creating new email templates*.

Procedure

- 1. Open the dashboard that you want to share through email or navigate to the visual that you want to include in the email.
- 2. Access the supplemental menu.

For visuals:

Click ••• in the upper-right corner of the visual.

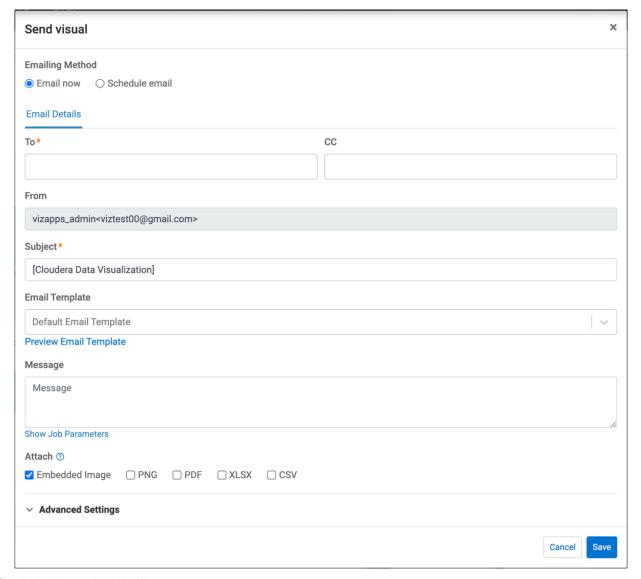
For dashboards:

Click the same icon (***) but in the upper-right corner of the dashboard.

3. Select Email from the drop-down menu.

The Send visual or Send sheet modal appears.

4. Select Email now.



5. Fill in the required details.

Fields marked with an asterisk are mandatory.

- To* Enter the primary recipients' email addresses.
- CC Enter the email addresses of additional recipients.
- From You can set the value of this field in Site Settings.
- Subject* You can modify the default title of the email.



Note:

The subject includes a default prefix you specified when enabling email and the title of the visual. The default prefix is [Cloudera Data Visualization].

6. You can set the Email Template that you want to use.

If you want to see how the template looks, click Preview Email Template.

- **7.** Enter the body text of the email in the Message field.
- 8. Click Show Job Parameters to view the list of parameters you can add to the message.

9. Choose how the visual is included in the email.

You can either embed the visual directly into the email body (default option) or attach it in one of the following formats:

- PNG
- PDF
- XLSX
- CSV



Important: The attachment type cannot be changed after the job is configured and saved.



Note: Email larger than 25 MB might not be sent, depending on the limits of the email server.

10. Configure Advanced Settings.

- Error Notification Emails To Specify an email address to receive error messages.
- Reply To Specify a different reply-to address if needed.
- Use Alias Create a new or use an existing alias for easier access.
- Page Parameters For visuals that have parameterized fields on their shelves, you can choose:
 - Include page parameters (default)
 - Do not include page parameters

You can also show or hide the page parameters.

11. Click Save.

A notification appears while the email is prepared. Once completed, a success message confirms the operation.

What to do next

You can choose to review the list of pending emails, cancel any running email jobs, or resend previously sent emails. For more information, see *Managing jobs*.

Related Information

Creating new email templates

Managing jobs

Schedule-based email

You can schedule regular emails to share visuals, sheets, and dashboards. These jobs run automatically based on a defined schedule or or are triggered when specific dataset measures meet predefined thresholds.

About this task

Follow these steps to schedule sending emails of visual, sheet, or dashboard. You can accomplish this either in Edit or in View mode.

Before you begin

You have the option to use an email template for this task, but it is not required. You can send the email as-is, without a message, or include your own custom message. If you decide to use a template, you can choose the default template or create a custom one. For guidance, see Creating new email templates.



Note: Only users with administrative privileges can create and manage email templates. For more information, see *Creating new email templates*.

• Before you schedule an email, check the Enable scheduled jobs option in Site Settings Jobs . For more information, see Enabling scheduled jobs in the Site Settings documentation.

Procedure

- 1. Open the dashboard that you want to share through email or navigate to the visual that you want to include in the email.
- 2. Access the supplemental menu.

For visuals:

Click ••• in the upper-right corner of the visual.

For dashboards:

Click the same icon ($^{\bullet\bullet\bullet}$) but in the upper-right corner of the dashboard.

3. Select Email from the drop-down menu.

The Send visual or the Send sheet modal appears.

4. Select the Schedule email option.

- **5.** Fill in the fields on the available tabs.
 - If Threshold is not enabled, you will see the Email Details and Schedule Details tabs.
 - If Threshold is enabled, the Threshold Details will also appear.

With threshold, you can schedule an email job that is triggered by measures on the dataset reaching a defined threshold. It means that email notifications are sent when the specified triggering condition occurs.

For Email Details

Fields marked with an asterisk are mandatory.

- To* Enter the primary recipients' email addresses.
- CC Enter the email addresses of additional recipients.
- From You can set the value of this field in Site Settings.
- Subject* You can modify the default title of the email.



Note:

The subject includes a default prefix you specified when enabling email and the title of the visual. The default prefix is [Cloudera Data Visualization].

• You can set the Email Template that you want to use.

If you want to see how the template looks, click Preview Email Template.

- Enter the body text of the email in the Message field.
- [Optional] Click Show Job Parameters to view the list of parameters you can add to the message.
- Choose how the visual is included in the email.

You can either embed the visual directly into the email body (default option) or attach it in one of the following formats:

- PNG
- PDF
- XLSX
- CSV



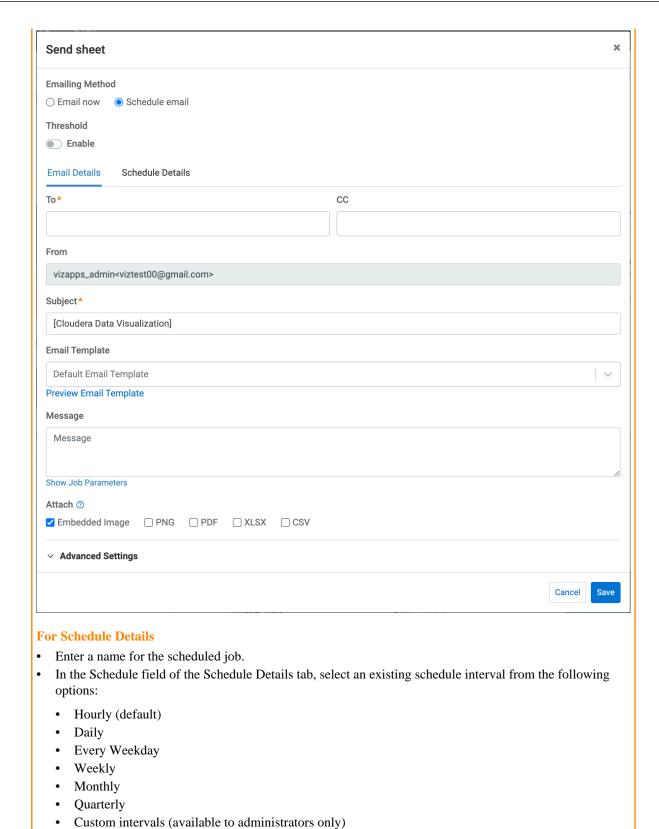
Important: The attachment type cannot be changed after the job is configured and saved.

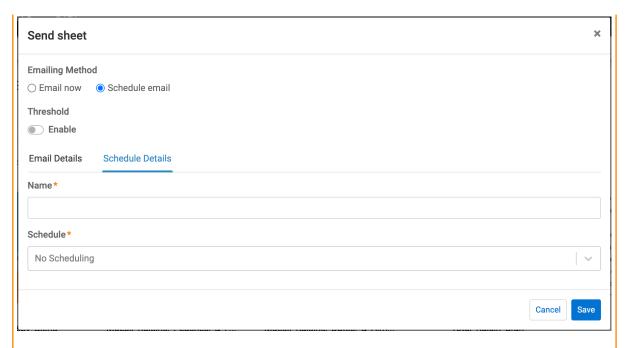


Note: Email larger than 25 MB might not be sent, depending on the limits of the email server.

- · Configure Advanced Settings.
 - Error Notification Emails To Specify an email address to receive error messages.
 - Reply To Specify a different reply-to address if needed.
 - Use Alias Create a new or use an existing alias for easier access.
 - Page Parameters For visuals that have parameterized fields on their shelves, you can choose:
 - Include page parameters (default)
 - Do not include page parameters

You can also show or hide the page parameters.





For Threshold Details

You can define a threshold-based trigger to send email notifications when specific conditions are met.

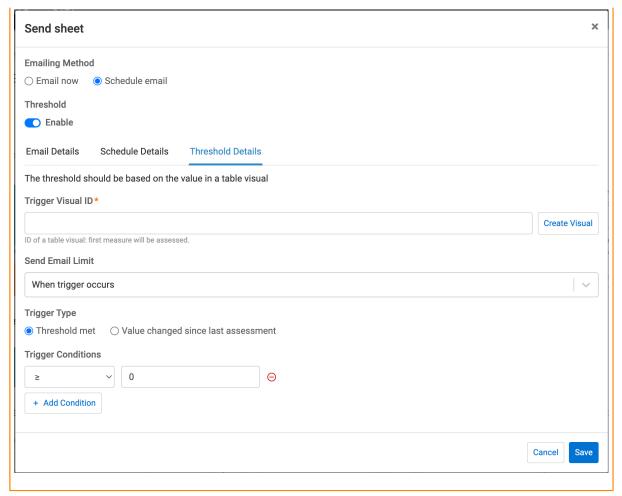
- Trigger Visual ID Define a new trigger visual or add the ID of an existing table visual.
- Send Email Limit Specify how often emails should be sent when the condition is met:
 - · Only on first trigger
 - · When trigger occurs
 - Once a half hour (default)
 - · Once an hour
 - · Once a day
 - · Once a week
 - Once in 2 weeks
 - Once a month
- Trigger Type Select one of the following options:
 - Threshold met: Triggers an email when the first measure of the first row in the trigger visual meets the conditional expression.
 - Value changed since last assessment: Triggers an email when the change in the first measure of the first row after the last assessment meets the conditional expression.
- Trigger Conditions Set logical operators (one of <, >, #, #, or =) and values.

You can add multiple trigger conditions with + Add Condition.



Note: If you set multiple conditions, All conditions must be true to trigger the job.

Cloudera Data Visualization Rerunning jobs



6. Click Save.

A notification appears while the email is prepared. Once completed, a success message confirms the operation.

What to do next

You can choose to review the list of pending emails, cancel any running email jobs, or resend previously sent emails. For more information, see *Managing jobs*.

Related Information

Creating new email templates

Rerunning jobs

Cloudera Data Visualization allows you to rerun previously defined and performed jobs.

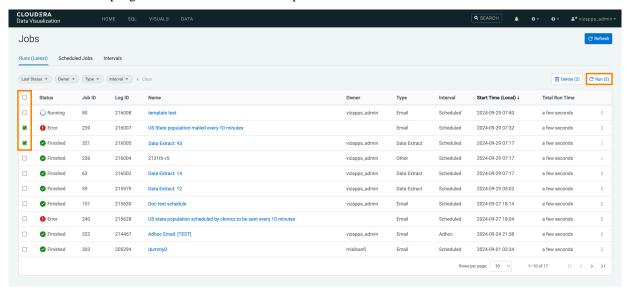
Procedure

- 1. Navigate to Runs (Latest) or Scheduled Jobs on the Jobs interface.
- 2. To rerun multiple jobs simultaneously, select them using the checkbox at the beginning of each row.

 Alternatively, you can use the checkbox located on the left side of the list header to select all jobs at once.

Cloudera Data Visualization Deleting job logs

3. Click Run in the top-right corner to initiate the rerun process.



If you wish to rerun a single job, you can click located at the end of the job row to open the supplemental menu and select Run Now.

You can also start a rerun from the Actions dropdown on the Job Details page.

4. Click Run jobs in the confirmation modal to proceed with the action.

The modal lists the IDs and names of the jobs you selected for rerunning.

As the rerun process progresses, the job log list refreshes automatically to show the status information for the new instances of the selected jobs. These statuses may appear as Running or Pending. Pending jobs do not display Start Time or Total Run Time until they commence operation.

Deleting job logs

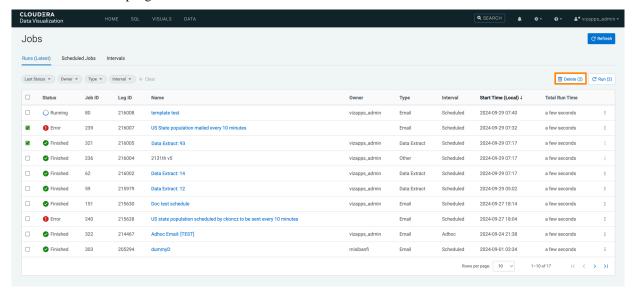
Cloudera Data Visualization allows you to remove unnecessary job run logs from your log list.

Procedure

- 1. Navigate to the Runs (Latest) tab within the Jobs interface.
- 2. Select the job runs you wish to delete. To select all logs, click the checkbox on the left side of the list header.

Cloudera Data Visualization Pausing and resuming jobs

3. Click Delete in the top-right corner.



4. Click Delete Runs in the confirmation modal to proceed with the action. The modal lists the IDs and names of the run logs you selected for deletion.

Pausing and resuming jobs

Cloudera Data Visualization allows you to suspend and resume scheduled jobs providing flexibility in running your tasks.

Pausing running jobs

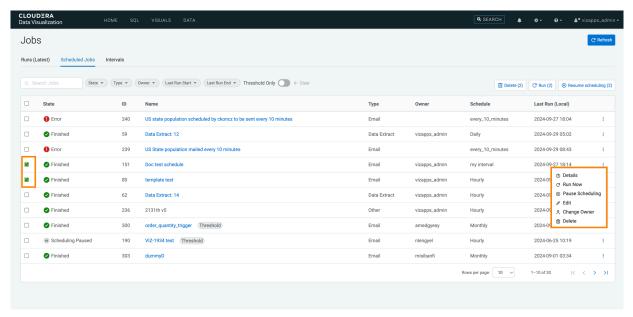
Procedure

- 1. Navigate to Scheduled Jobs on the Jobs interface.
- Locate the job you wish to pause and click located at the end of the job row to open the supplemental menu.

Cloudera Data Visualization Pausing and resuming jobs

3. To pause a single job, locate the job you wish to pause and click supplemental menu.

To pause multiple jobs simultaneously, select them using the checkbox at the beginning of each row. If you want to pause all jobs, click the checkbox on the left side of the list header.



- 4. Click Pause Scheduling
- 5. Click Pause in the confirmation modal to proceed with the action.

The modal lists the IDs and names of the jobs selected for pausing.

A notification that the job is paused appears briefly, the status of the job changes to Scheduling Paused, and the Pause Scheduling option is replaced with Resume Scheduling in the supplemental menu.

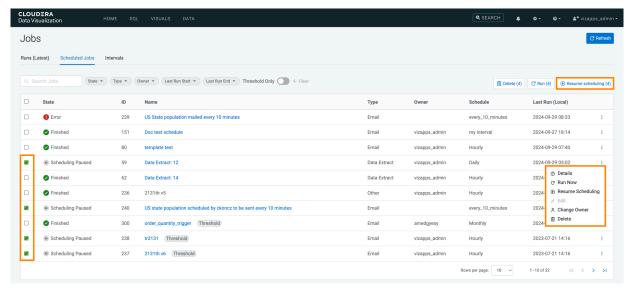
Resuming paused jobs

Procedure

1. Navigate to Scheduled Jobs on the Jobs interface.

2. To rerun a single job, locate the job you wish to resume and click supplemental menu.

To resume multiple paused jobs simultaneously, select them using the checkbox at the beginning of each row. If you want to resume all jobs, click the checkbox on the left side of the list header.



- 3. Click Resume Scheduling
- 4. Click Resume in the confirmation modal to proceed with the action.

The modal lists the IDs and names of the jobs selected for resuming.

A notification that the job is resumed appears briefly, the status of the job changes, and the Resume Scheduling option is replaced with Pause Scheduling in the supplemental menu.

Changing the owner of a job

Cloudera Data Visualization enables job owners and system administrators to change the owner of an existing job. This functionality is particularly useful when reassigning jobs from deleted users, as these jobs cannot run until the owner is updated.

About this task

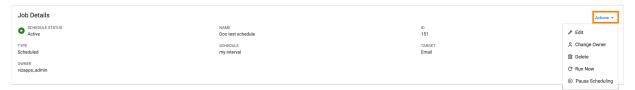
You can perfom this task from two locations:

- On the Job Details page, which provides detailed insights into the selected job, helping you understand and manage job operations more effectively, while also offering access to various job-related actions.
- On the Scheduled Jobs page, using the supplemental menu of a job listed on this page.

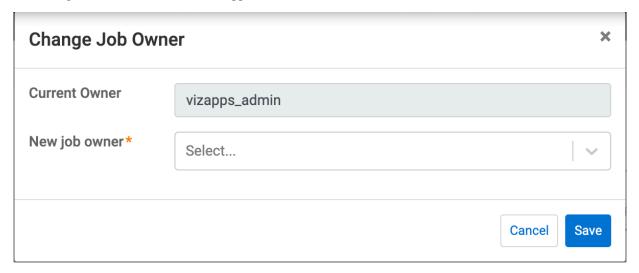
Procedure

Click the name of the job on either the Runs (Latest) or the Scheduled Jobs tab.
 The Job Details page opens.

2. On the Job Details page, click Actions Change Owner in the top-right corner.

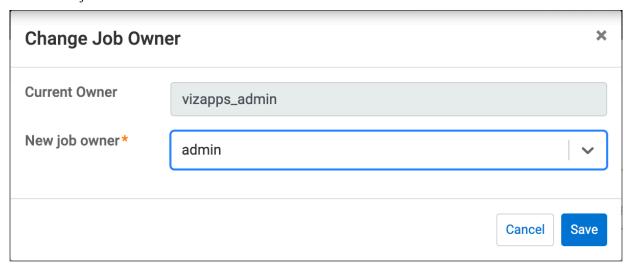


The Change Job Owner modal window appears.



Alternatively, you can open this Change Job Owner modal from the supplemental menu of the job on the Scheduled Jobs page.

3. Select a new job owner from the list of available users.



4. Click Save to confirm the change.



Note: When the job owner is changed, the ownership of the related logs is also updated accordingly.

Editing jobs

Cloudera Data Visualization allows you to modify the details of existing jobs.

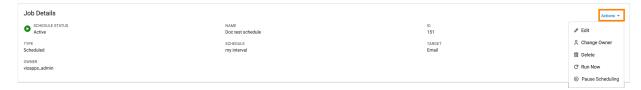
About this task

You can perfom this task on the Job Details page, which provides detailed insights into the selected job. This page helps you understand and manage job operations more effectively, while also offering access to job-related actions.

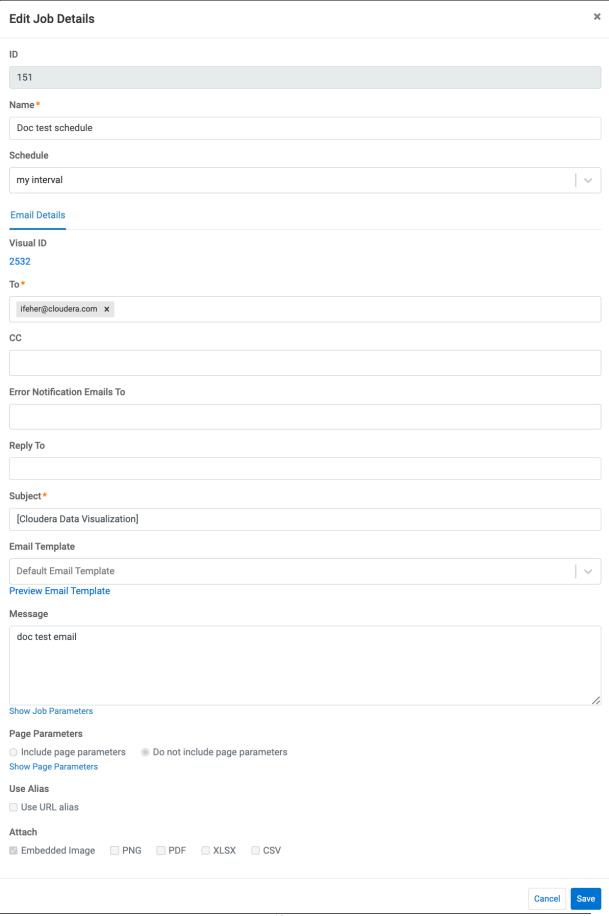
Procedure

1. Click the name of the job on either the Runs (Latest) or Scheduled Jobs tab. The Job Details page opens.

2. Click Actions Edit in the top-right corner.



The Edit Job Details modal window appears.



Cloudera Data Visualization Deleting scheduled jobs



Note:

The Edit action is not available for data extract jobs. Editing data extracts is only possible on the Data Extracts page. For more information on changing data extract details, see *Editing a data extract*.

- 3. Modify the fields according to your needs.
- **4.** Once you have finalized the updates, click Save to apply the modifications.

Related Information

Editing a data extract

Deleting scheduled jobs

Cloudera Data Visualization allows you to delete existing scheduled jobs that you do not need any more.

About this task

You can perfom this task from two locations:

- · On the Scheduled Jobs page
- On the Job Details page.



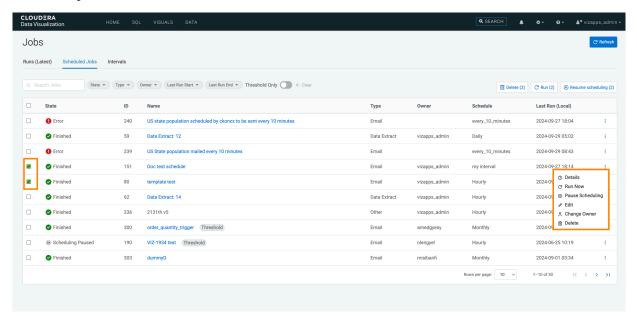
Important:

Deleting a scheduled job will delete the job itself along with all associated job run logs.

Procedure

- 1. Navigate to the Scheduled Jobs tab within the Jobs interface.
- To delete a single job, locate the job you wish to delete and click at the end of the job row to open the supplemental menu.

To delete multiple jobs simultaneously, select them using the checkbox at the beginning of each row. If you want to delete all jobs, click the checkbox on the left side of the list header.



Alternatively, you can open the Job Details page by clicking the name of a job on either the Runs (Latest) or the Scheduled Jobs tab, and on the Job Details page, click Actions Delete in the top-right corner.

3. Click Delete.

A confirmation modal appears, listing the IDs and names of the scheduled jobs you selected for deletion.

4. Click Delete again to proceed with the action.

Creating new schedule intervals

Cloudera Data Visualization allows you to create custom schedules for your scheduled jobs.

About this task



Note: This feature is only available to users with administrative privileges.

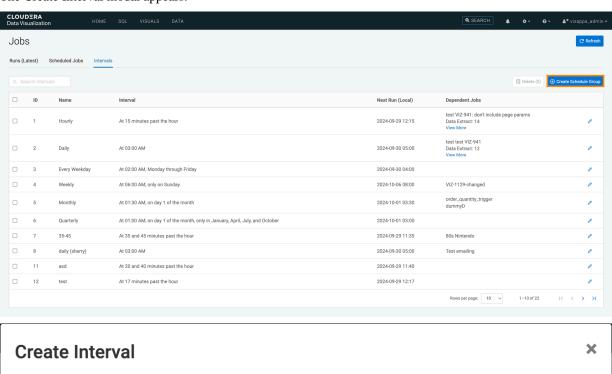
To create a new schedule that can be used by one or more scheduled jobs, follow the below steps.

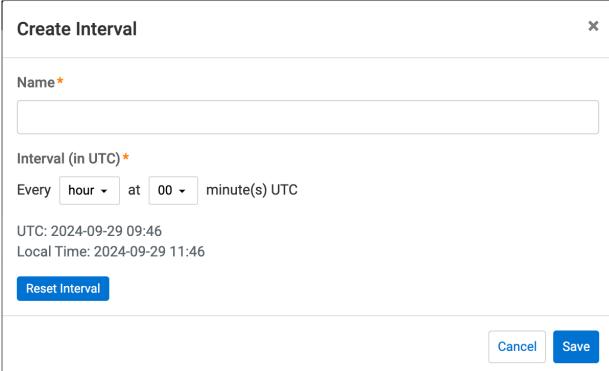
You can also create custom schedule intervals when configuring a new scheduled email. These intervals are accessible on the Intervals page, and can be reused for other jobs as well.

Procedure

1. Navigate to the Intervals tab within the Jobs interface.

Click Create Schedule Group.The Create Interval modal appears.





Cloudera Data Visualization Editing schedule intervals

- **3.** Specify the parameters of the schedule:
 - In the Name field, provide a descriptive name for the new schedule interval.
 - When selecting the date/time of the run, remember that the time format is in UTC. Local time format
 designation is provided for reference.
 - Choose the largest time component in the first selectable field (defaulted to year).
 - · For the day of the month, select one or multiple days as needed.
 - Set the hour and minute components of the schedule in the third field, with multiple selections possible based on previous choices.



Note: The number of selections depends on the granularity of the time interval specified by the first choice.

4. Click Save to create the new schedule.

A brief success message appears on your screen, confirming the creation of the new interval. The newly created interval is now visible in the Intervals interface for future use.

Editing schedule intervals

Cloudera Data Visualization allows you to change the details of the schedule intervals that you previously defined for your scheduled jobs.

About this task



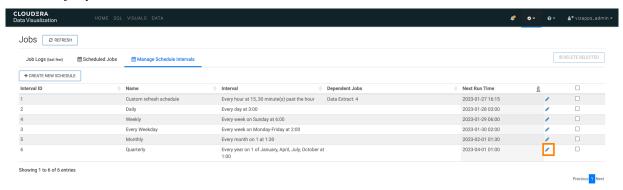
Note: This feature is only available to users with administrative privileges.

Procedure

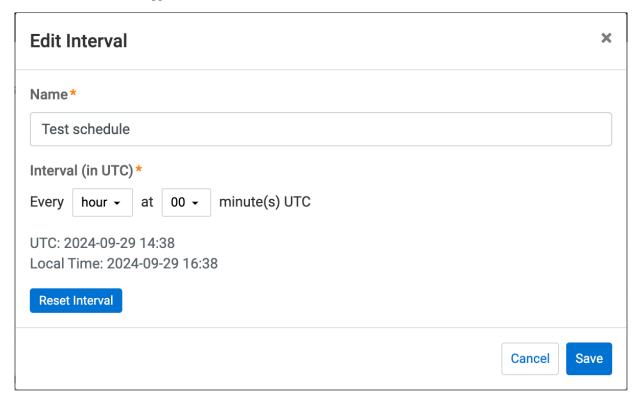
1. Navigate to the Intervals tab within the Jobs interface.

Cloudera Data Visualization Editing schedule intervals

2. Locate the job you wish to edit and click at the end of the schedule row.



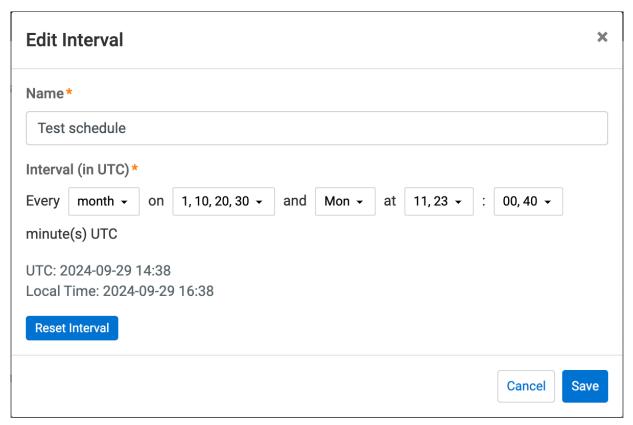
The Edit Interval modal appears.



Cloudera Data Visualization Deleting schedule intervals

3. Adjust the name or the time selection according to your needs.

In the below example, the time selection is adjusted to account for the 7-hour difference between UTC and local time (PDT). To achieve the intended notification times of 04:00 and 16:00 local time (PDT), adjust the hour parameter from 4 and 16 to 11 and 23, respectively.



4. Click Save to apply the modifications.

Deleting schedule intervals

Cloudera Data Visualization allows you to delete previously defined job schedule intervals that are no longer needed.

About this task



Note: This feature is only available to users with administrative privileges.

Procedure

1. Navigate to the Intervals tab within the Jobs interface.

Cloudera Data Visualization Deleting schedule intervals

2. Select the intervals you wish to delete by using the checkbox at the beginning of each row. To select all intervals, use the checkbox on the left side of the list header.

Data Visualization HOME SQL VISUALS DATA

| Q SEARCH |

2024-10-01 03:30

2024-10-01 03:00 2024-09-29 16:35

2024-09-30 05:00

Test emailing

3. Click Delete in the top-right corner.

daily (sherry)

At 01:30 AM, on day 1 of the month

At 03:00 AM

At 01:00 AM, on day 1 of the month, only in January, April, July, and October

The Delete Interval modal appears, listing the IDs and names of the intervals you selected for deletion.

4. Click Delete to proceed with the action.