



Visualizer Setup

Preparing to create visualizations and dashboards

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Prepare a dashboard

Once the initial metadata scan has begun, the index pattern can be set up and default visualizations and dashboards imported to the Visualizer. The index pattern is what the Visualizer draws from to display results in visualizations. These visualizations, in turn, can be grouped together in a dashboard. Dashboards can help team members and project stakeholders connect results to business objectives.

Set up the index pattern

The Visualizer leverages an index pattern to determine the results to display in visualizations and dashboards. An index pattern need only be created once. It can be created once an initial metadata scan has successfully begun.

To set up the index pattern:

1. Access your organization's Visualizer
2. Click **Management**
3. Click **Index Patterns**
4. Click **Create Index Pattern**
5. In the **Index Pattern** text field, type the name of the index
 - a. Note: The index will display in the results if a metadata scan completes successfully.
6. Click **Next step**
7. Click "**I don't want to use the Time Filter**" under the **Time Filter field name** drop down menu
8. Click Create index pattern

Import default visualizations and dashboards

Visualizations are widgets that explore or explain items in the index using charts or graphs. Dashboards are used to group multiple visualizations together to present a specific explanatory or exploratory theme to stakeholders. While it is possible to create visualizations and dashboards net new in the Visualizer, default visualizations and dashboards are available to import as part of the Cognitive Toolkit.

To import default visualizations and dashboards into the Visualizer:

1. Click **Management**
2. Click **Saved Objects**

3. Click **Import**
4. Navigate to *Visualizations.json*.
 - a. Note: This file is usually found within the folder structure
\\shinydocs-cognitive-toolkit-resources-X.X.X.X-YYYY-MM-DD\External
Resources\Sample Visualizations
5. Click **Open**
6. Click **Import**
7. From the dropdown within the Visualizer, select the index pattern created in the preceding step
8. Click **Confirm all changes**
9. Click **Done**
10. From the side panel in the Visualizer, click **Dashboard**
11. Click **Base-Metadata** (the name itself and not the checkbox)
12. Review the results from the initial metadata scan