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## Sheets

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# CLOUDERA

<https://docs.cloudera.com/>

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## Creating a new sheet

CDP Data Visualization enables you to create new sheets within a dashboard.

### Procedure

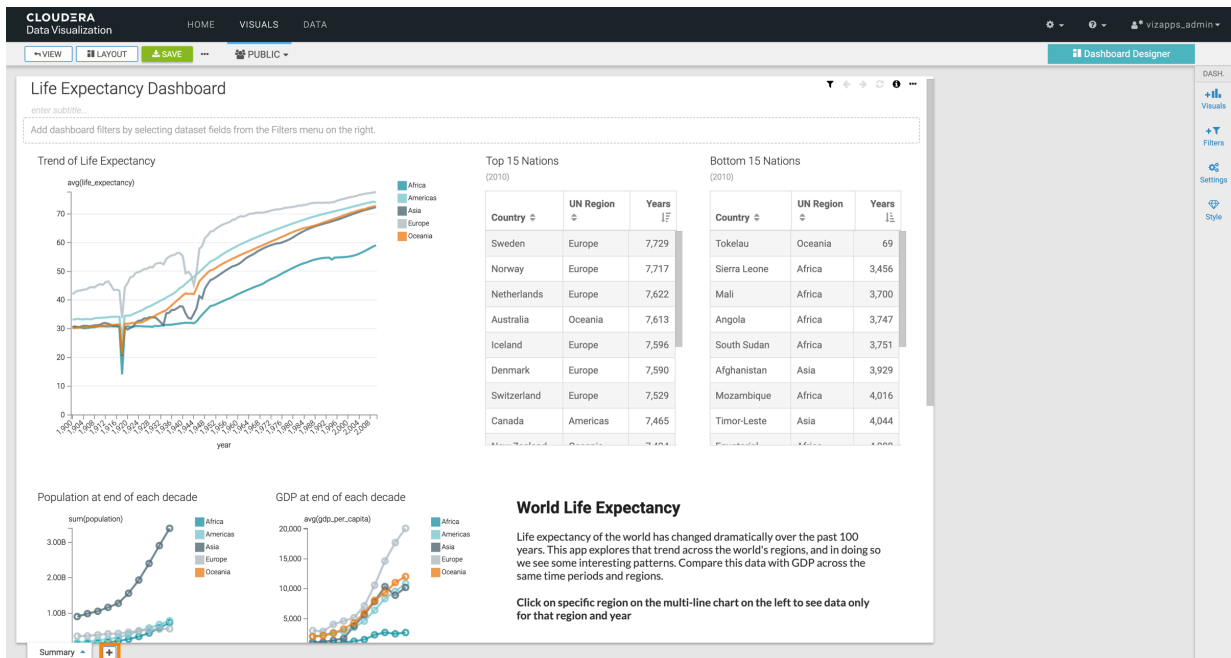
1. Open a dashboard of your choice in Edit mode.

By default, each dashboard contains a single sheet. If you create a new dashboard for this exercise, its single sheet already contains a default table visual based on the initial dataset.



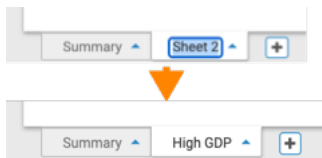
**Note:** You must save the dashboard before adding a new sheet.

2. At the bottom left corner of the interface, click the (plus) icon next to the existing sheet title.



Data Visualization creates a new blank sheet, titled Sheet 2. The sheet title is highlighted, so you can immediately change its name to something more descriptive.

3. Change the name of the sheet. In this example, Sheet 2 is renamed to High GDP.



4. Click SAVE to save the all changes to the dashboard.

### What to do next

Start building out the new sheet by adding filters and visuals.

## Adding visuals to a sheet

CDP Data Visualization enables you to add visuals to a sheet.

## Procedure

1. Open a dashboard of your choice in Edit mode.
2. Choose a sheet in the dashboard where you plan to add visuals.



**Note:** By default, each new dashboard contains a single sheet.

This examples works with a sheet called High GDP.

3. In the Visual Builder side menu bar on the right, select Visuals.

The screenshot displays the Cloudera Data Visualization interface. At the top, the navigation bar includes 'CLOUDERA Data Visualization', 'HOME', 'VISUALS', and 'DATA'. The user is logged in as 'vizapps\_admin'. The main area shows a 'Life Expectancy Dashboard' with instructions: 'Add dashboard filters by selecting dataset fields from the Filters menu on the right.', 'Add visuals by selecting them from the Visuals menu on the right.', 'To resize a visual, drag the icon in its lower right corner to desired height and width.', and 'To rearrange the visuals, click on the Layout button in the menu bar at the top to open the Layout popup.' The right-hand side menu bar, titled 'Dashboard Designer', contains 'Visuals' (highlighted with a red box), 'Filters', 'Settings', and 'Style'. The bottom of the interface shows a 'Summary' tab and a 'High GDP' sheet selector.

4. In the Visuals menu, make configuration changes as you need.

You can set the following:

The screenshot shows the 'VISUALS' pane in Power BI. On the left, there are six annotations labeled 'a' through 'f' in orange circles, each with an arrow pointing to a specific feature in the Visuals pane:

- a:** Points to the 'Recently Viewed Visuals' section, which lists 'Total GDP', 'Compare GDP', and 'GDP > 25K, North Europe'.
- b:** Points to the 'Connection' dropdown menu, which is currently set to 'samples'.
- c:** Points to the 'Dataset' dropdown menu, which is currently set to 'World Life Expectancy'.
- d:** Points to the 'NEW VISUAL' button, which is green and has a bar chart icon.
- e:** Points to a 'Compare GDP' visual card, which is a donut chart.
- f:** Points to a 'World Population - Highlight Marks on Dual Bar and Area' visual card, which is a bar and area chart.

**a.** *Recently Viewed Visuals*

You can see here the new visuals added recently. Click one of the options in the top menu to add a visual to the dashboard sheet.

**b.** *Connection*

Data Visualization supports access to multiple data sources in the same dashboard, so you can change the connection to access visuals based on different connections and dataset. The Connection drop-down list lets you select an alternate connection. It is available in both the Visuals and Filters menus.



**Note:** A dashboard can contain visuals from several connections.

Click the name of the current connection, and select a different connection from the menu. When you change the connection, it changes the dataset to the first one that is available on that connection. This also updates the list of visuals that appear in the lower portion of the menu.

**c. Dataset**

The Dataset drop-down list lets you select an alternate dataset. It is available in both Visuals and Filters menus.



**Note:** A dashboard can contain visuals from multiple datasets that share the same connection or from different datasets across different connections.

Click the name of the current dataset, and select a different dataset from the menu. When you change the dataset, a new set of existing visuals appears in the menu. You can change the source dataset of the visuals that you plan to add to your dashboard sheet. The new dataset may be on the same connection, or on a different connection.

**d. New Visual**

The NEW VISUAL button enables you to start a new visual from within the dashboard. This creates a new table visual based on the chosen dataset. You can open this visual in edit mode and make changes by selecting another option from the Visual Catalog, populating the shelves of the visual, customizing settings, colors, and so on.

**e. Linked Visual**

This option allows you to reuse an existing visual that has been previously marked as linked.

1. Click to select a visual that is marked with the (linked) symbol.

Data Visualization opens an Add Linked Visual modal window.

2. Choose one of the following options:

- Clone visual option, the default, makes a copy of the linked visual. This new visual can be subsequently changed without affecting the original visual.
- Maintain link option keeps the association; any changes made to the visual in one dashboard appear in all dashboards that feature this same visual.

3. After making your choice, click ADD VISUAL.

**f. Existing Visual**

Existing visuals that belong to the specified dataset are displayed lower on the menu. Changing the dataset gives access to other visuals. You can click the visuals to add them to the dashboard. To add a visual that already exists in this dashboard and appears on another sheet, click the icon that represents this visual.

5. Click SAVE to save all changes to the sheet.

6. To further enhance the dashboard sheet, add filters. For instructions, see *Adding filters to a sheet*.

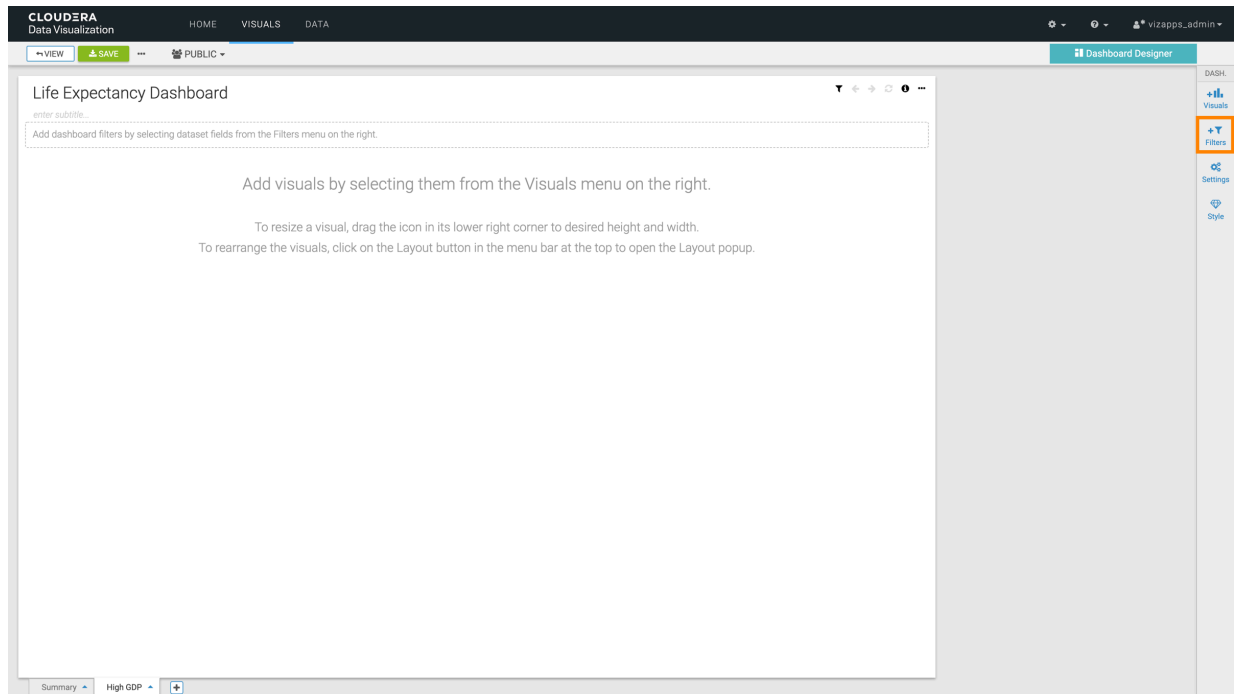
## Adding filters to a sheet

CDP Data Visualization enables you to add filters to a sheet.

### Procedure

1. Open a dashboard of your choice in Edit mode.

2. Choose a sheet in the dashboard where you plan to add visuals.  
In this example, a sheet called High GDP is used.
3. In the Visual Builder side menu bar on the right, select Filters.





4. In the Filters menu, make configuration changes as you need.

You can set the following options:



**a. Custom Filter**

Click CREATE CUSTOM FILTER at the top of the Filters menu.

Data Visualization adds a new filter, aptly named New Filter, to the filter area of the sheet. It then opens the Settings window modal where you can name the new filter and specify its value options, data handling, display, scope, and custom styling.

For information on new dashboard-specific filter scope options, see *Configuring scope of dashboard filters*.

**b. Connection**

Data Visualization supports access to multiple data sources in the same dashboard, so you can change the connection to access visuals based on different connections and dataset.

Click the name of the current connection, and select a different connection from the menu. When you change the connection, note that it changes the dataset to the first one that is available on that connection. This also updates the list of visuals that appear on the lower portion of the menu.

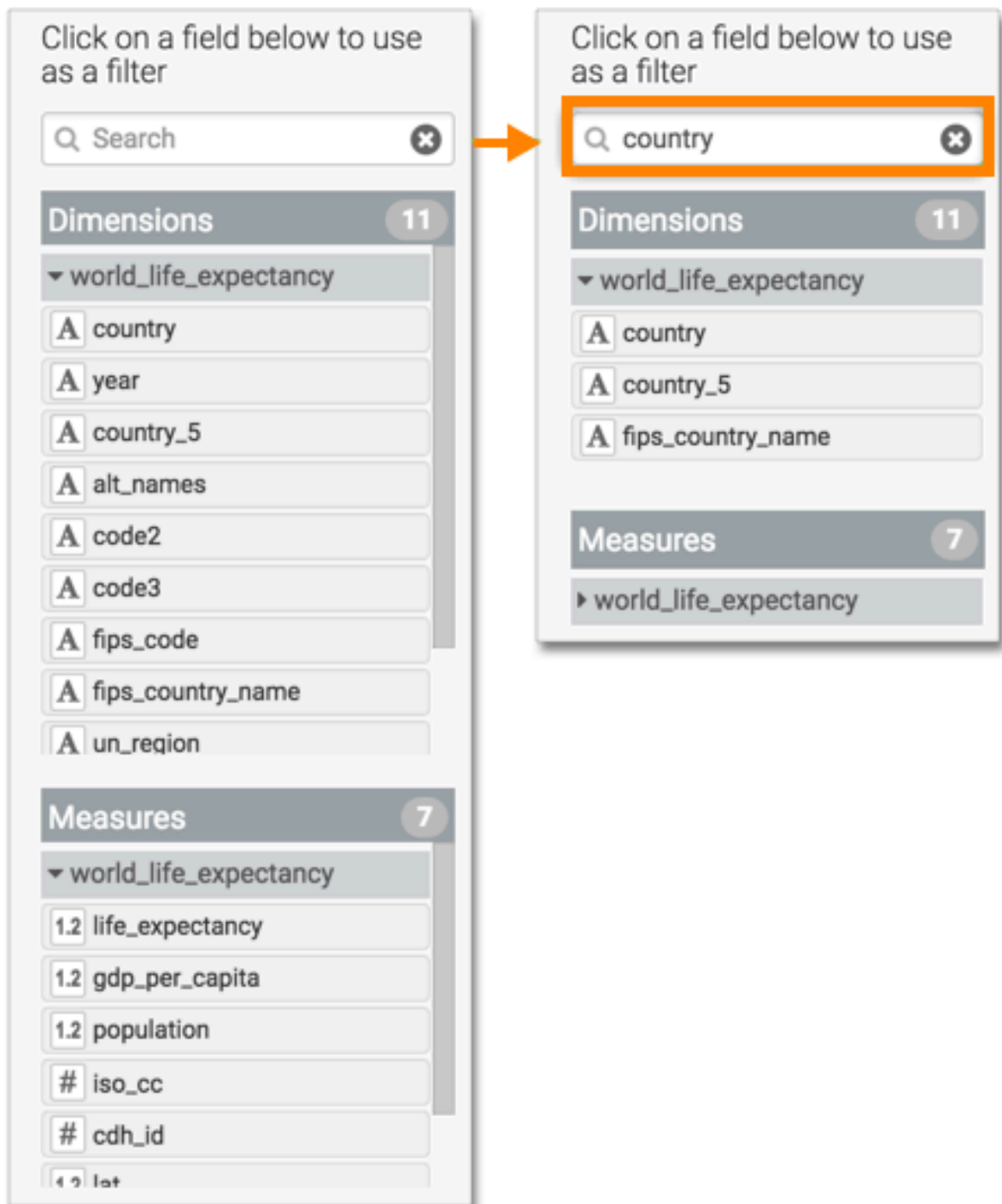
**c. Dataset**

You can change the source dataset of the visuals that you plan to add to your dashboard sheet. The new dataset may be on the same connection, or on a different connection.

Click the name of the current dataset, and select a different dataset from the menu. This also updates the list of visuals that appear on the lower portion of the menu.

**d. Search for Field**

For datasets built on very wide tables, this option helps you find the base field for your filter.



**e. Field Filter**

Clicking one of the fields in either Dimensions or Measures adds a basic filter based on that field into the filter area of the interface.

In this example, the filter country has been added. You can use it directly, or open the Settings menu, where you can rename the filter and specify its value options, data handling, display, scope, and custom styling.

**f. Field Groups**

For ease of viewing, you can collapse or expand the list of fields in either Dimensions, Measures, or both.

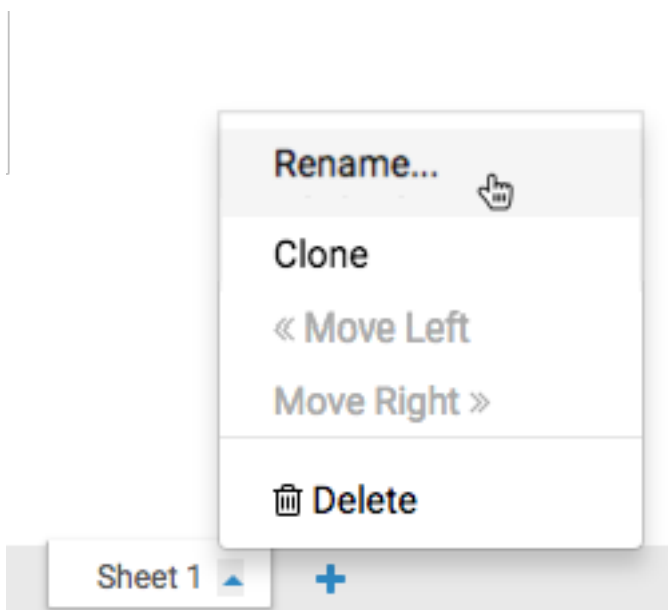
Additionally, datasets that represent two or more joined tables group the fields of each table separately. Clicking the name of the table under Dimensions or Measures toggles between expanding the list of these fields.

## Renaming a sheet

CDP Data Visualization enables you to rename sheets.

### Procedure

1. Open a dashboard of your choice in Edit mode.  
By default, each dashboard contains a single sheet, titled Sheet 1.
2. At the bottom left corner of the interface, click the (up arrow) icon next to the title of the sheet.
3. In the sheet management menu, click Rename.



The sheet title becomes editable.

4. Type the new name and either enter/return on the keyboard, or click outside the sheet title space.

In this example, the name of the sheet has changed from Sheet 1 to High GDP.



5. Click SAVE to save the all changes to the dashboard.

Alternatively, you can double-click on the title of the sheet to change it in Edit mode.

You can click VIEW to preview the changes to the dashboard at runtime.

## Moving and reordering sheets

CDP Data Visualization enables you to move and reorder sheets in a dashboard.

### Procedure

1. Open the dashboard in Edit mode.
2. Select the sheet you want to move by clicking on its tab, at the bottom left corner of the interface.

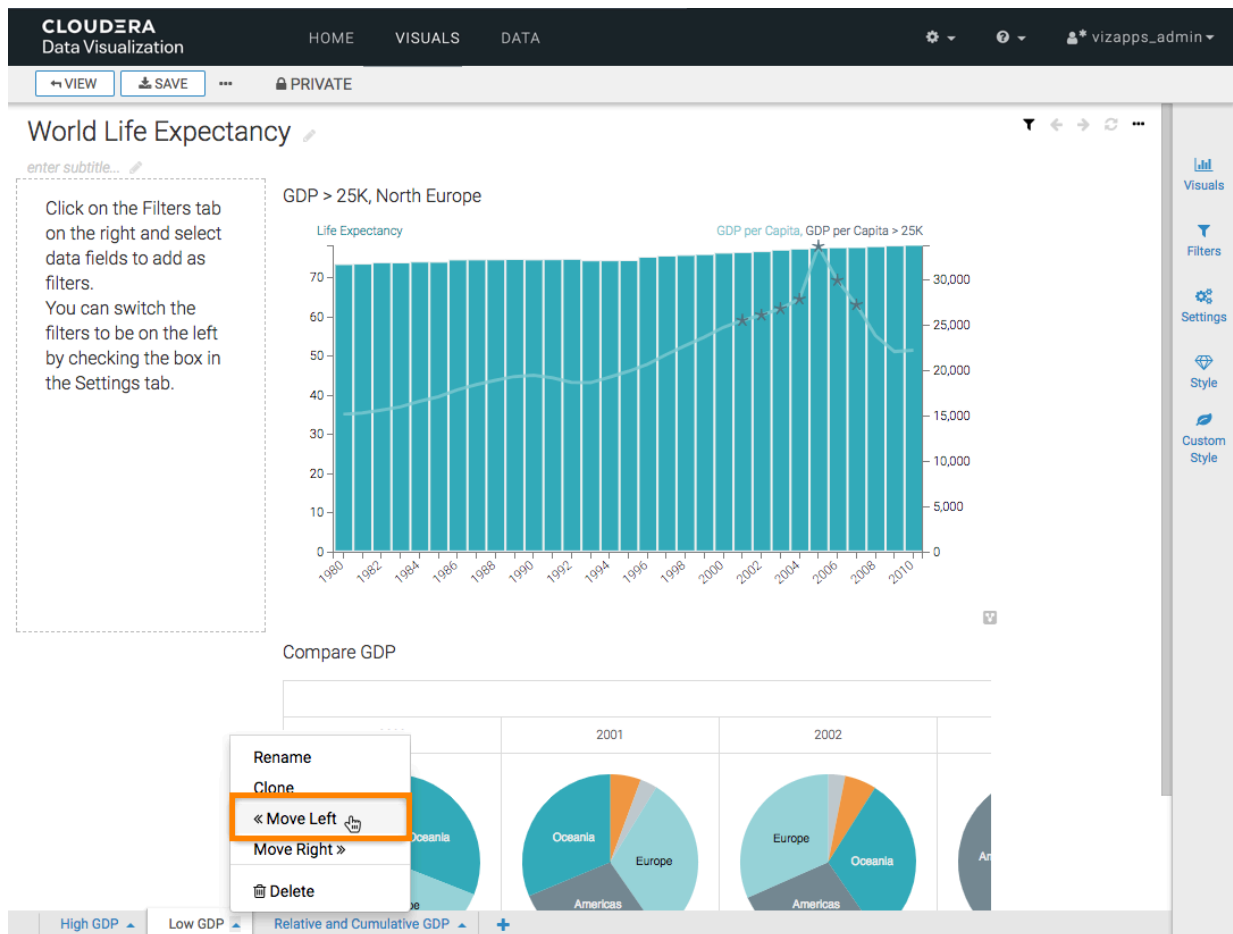
In this example, the sheet Low GDP is chosen, the second of three sheets of the dashboard.

The screenshot shows the Cloudera Data Visualization interface. At the top, there are navigation tabs for HOME, VISUALS, and DATA. Below these are buttons for VIEW, SAVE, and PRIVATE. The main dashboard area contains three sheets:

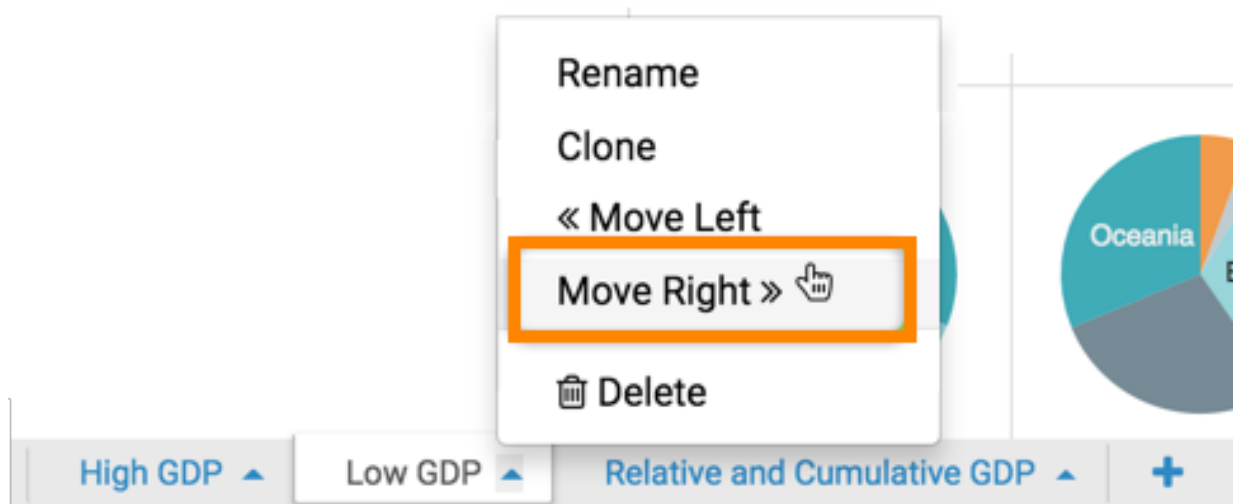
- World Life Expectancy**: A line chart showing life expectancy from 1980 to 2010. A tooltip box on the left contains instructions: "Click on the Filters tab on the right and select data fields to add as filters. You can switch the filters to be on the left by checking the box in the Settings tab."
- GDP > 25K, North Europe**: A combined bar and line chart showing Life Expectancy (bars) and GDP per Capita (line) from 1980 to 2010. The GDP per Capita line is labeled "GDP per Capita, GDP per Capita > 25K".
- Compare GDP**: A series of pie charts for the years 2000, 2001, and 2002, showing the relative GDP of Americas, Oceania, and Europe.

At the bottom left, there are three tabs: "High GDP", "Low GDP", and "Relative and Cumulative GDP". The "Low GDP" tab is highlighted with an orange box.

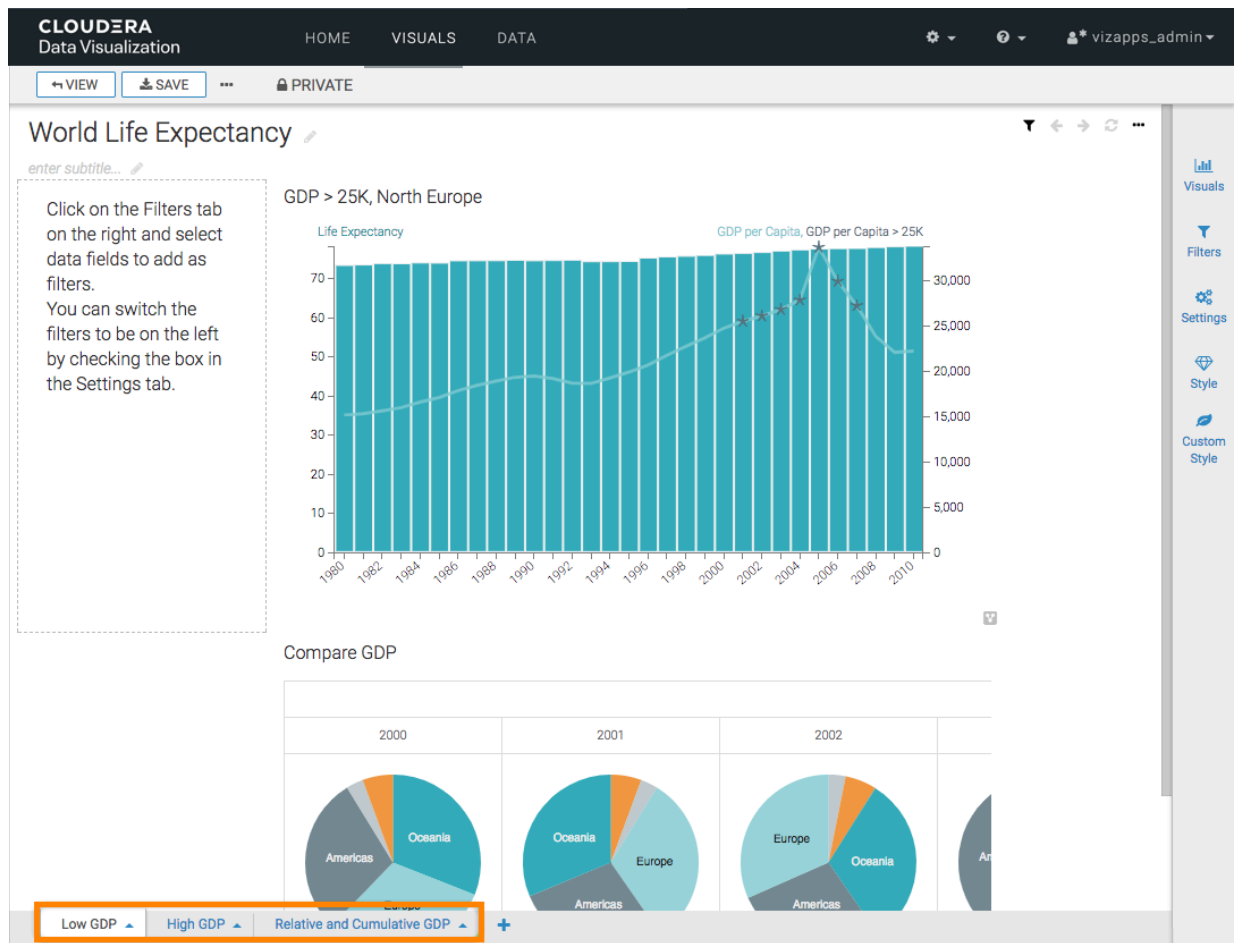
- To move a sheet to the left, click the (up arrow) icon next to the title of the sheet, and choose the Move Left option.



Similarly, if you wanted to move the sheet to the right instead, choose the Move Right option.

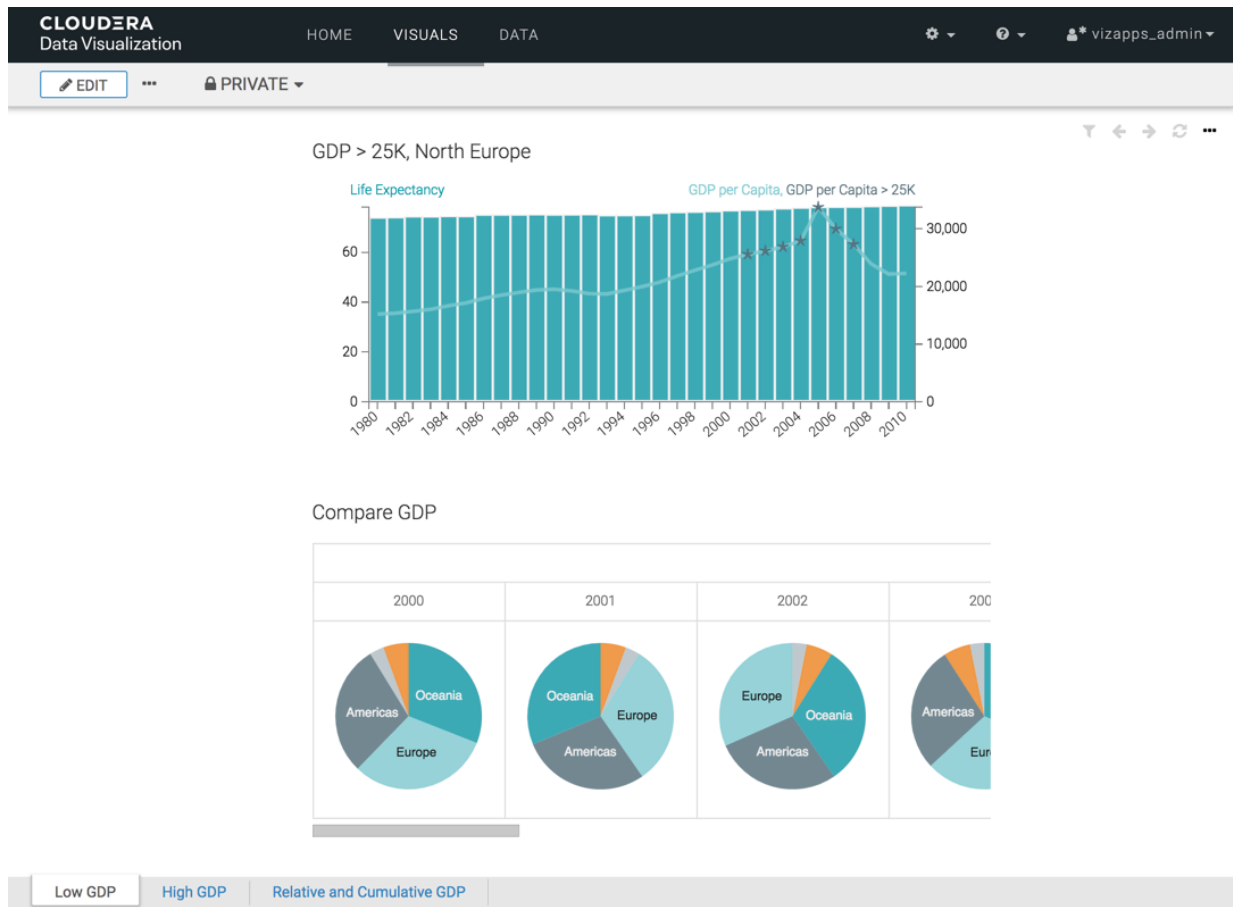


The dashboard moves to the extreme left, or the first sheet in the dashboard.



4. Click SAVE to save the all changes to the dashboard.

5. To see how the dashboard appears at runtime and to confirm that the order of sheets is correct, click VIEW. In this example, the order of sheets in the dashboard is just like intended.



## Cloning a sheet

CDP Data Visualization enables you to clone a sheet in a dashboard.

You can clone internal and external sheets.

### Cloning an internal sheet in a dashboard

In CDP Data Visualization, you can clone sheets within a dashboard.

#### Procedure

1. Open the dashboard in Edit mode.
2. Select the sheet you want to clone by clicking on its tab, at the bottom left corner of the interface. In this example, the sheet Low GDP is chosen.

- Click the (up arrow) icon next to the title of the sheet, and choose the Clone option.

Data Visualization creates a clone of the sheet, and places it on the extreme right.

- Rename the sheet, and click SAVE to save the all changes to the dashboard.



## Cloning an external sheet in a dashboard

In CDP Data Visualization, you can clone a sheet from another dashboard, and import it into your current dashboard.

### Procedure

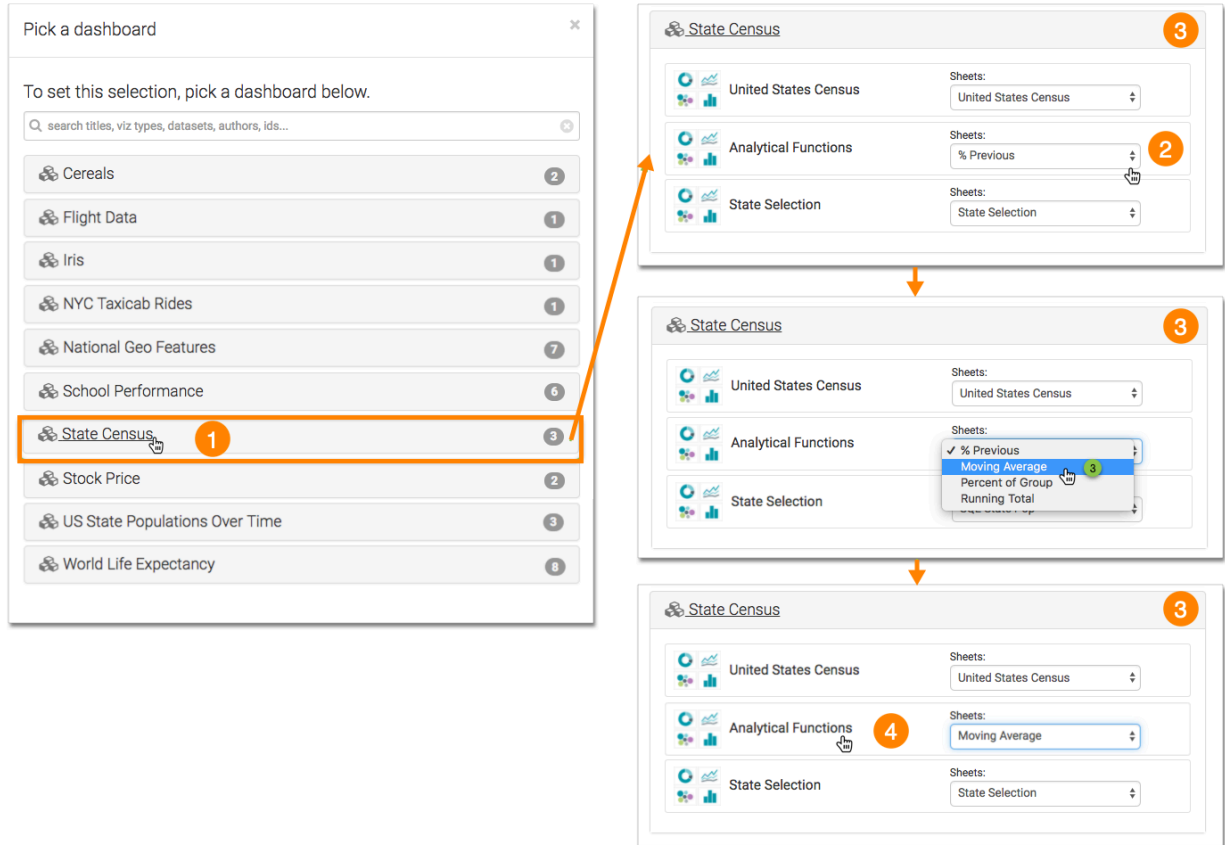
1. Open the dashboard in Edit mode.
2. At the bottom of the interface, hover over the (plus) icon next to the right-most sheet title. A new widget, the (up) icon, appears to the right of the (plus) icon.
3. Click the (up) icon.

The screenshot shows the Cloudera Data Visualization interface. The dashboard is titled "World Life Expectancy" and contains two charts. The first chart, "GDP > 25K, North Europe", is a bar chart showing Life Expectancy (left y-axis, 0 to 50) and GDP per Capita (right y-axis, 0 to 20,000) from 1980 to 2010. The second chart, "Compare GDP", consists of three pie charts. A tooltip on the left side of the dashboard provides instructions on how to use filters. At the bottom of the dashboard, there are three tabs: "Low GDP", "High GDP", and "Relative and Cumulative GDP". A red box highlights a plus icon and an up arrow icon next to the "Relative and Cumulative GDP" tab.

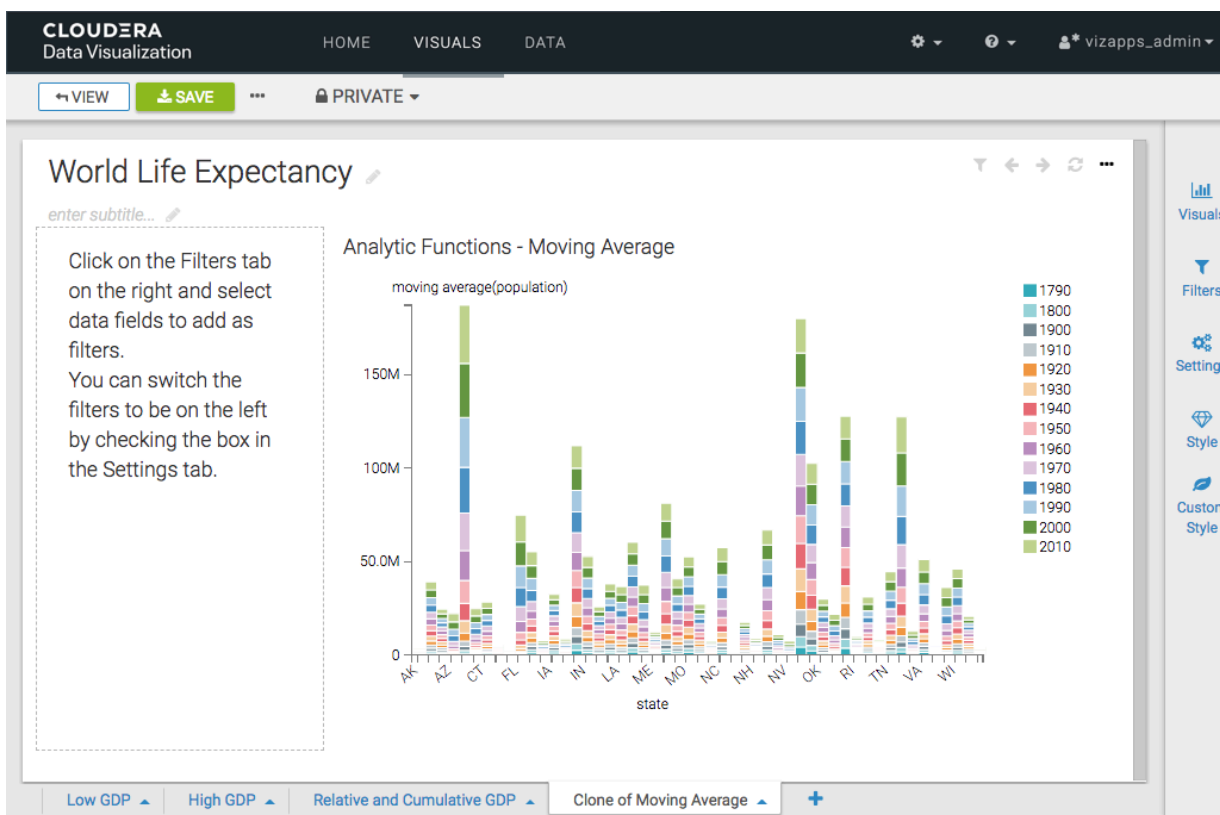
4. In the menu, select Import Sheet.

The screenshot shows the Cloudera Data Visualization interface. At the top, there's a navigation bar with 'HOME', 'VISUALS', and 'DATA'. Below that, there are buttons for 'VIEW', 'SAVE', and 'PRIVATE'. The main content area is titled 'World Life Expectancy' and contains a subtitle 'enter subtitle...'. A text box on the left provides instructions: '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.' The dashboard features two charts: 'GDP > 25K, North Europe' (a combined bar and line chart showing Life Expectancy and GDP per Capita from 1980 to 2010) and 'Compare GDP' (three pie charts). A right-hand sidebar contains tabs for 'Visuals', 'Filters', 'Settings', 'Style', and 'Custom Style'. At the bottom, there are filter buttons for 'Low GDP', 'High GDP', and 'Relative and Cumulative GDP'. A context menu is open over the 'Import Sheet' button, which is highlighted with an orange border. The menu also includes 'Add New Sheet'.

5. In the Pick a dashboard modal window, make the selection in the following manner:
  - a. Select the dataset.
  - b. Select the dashboard.
  - c. Select the particular sheet that you plan to import.
  - d. Click the dashboard.



Data Visualization creates a clone of the external sheet, and imports it into the dashboard, placing it on the extreme right.



6. Rename the sheet and click SAVE to save the all changes to the dashboard.

## Downloading a sheet

CDP Data Visualization enables you save the current sheet of a dashboard as a .png file and to download the entire dashboard as a PDF file with each sheet on a separate page.

## Downloading dashboard sheets as PNG files

CDP Data Visualization (CDV) 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.



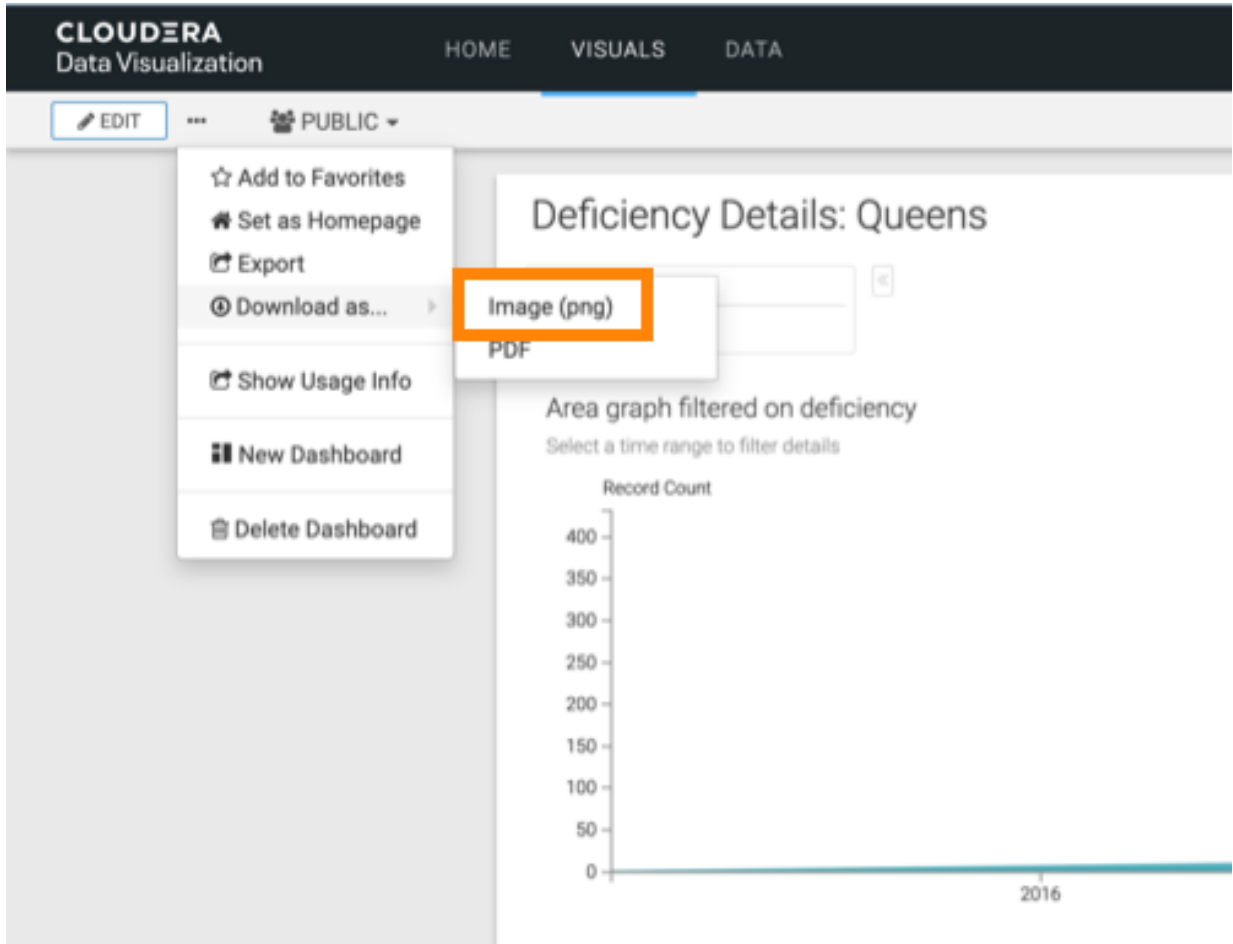
**Note:**

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

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

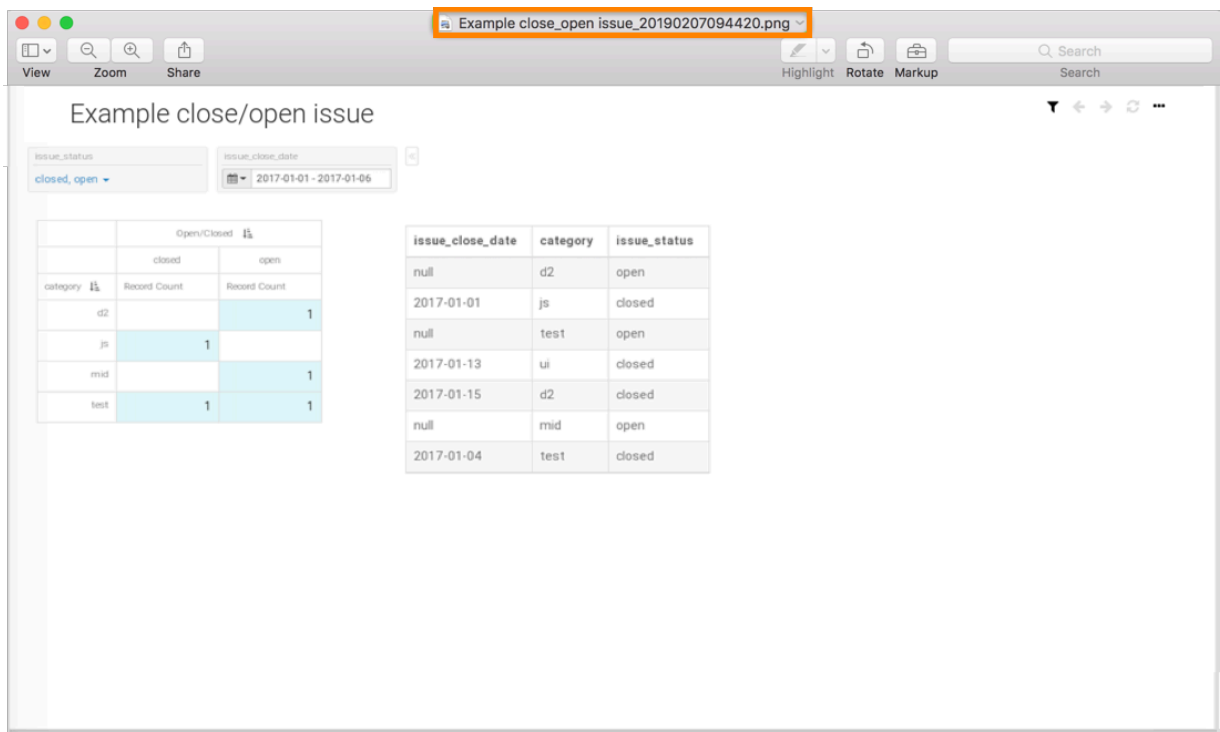
Data Visualization saves the current sheet to a PNG file.

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 h:mm:ss format



**Note:** 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\_XXXXXXXXXXXX.pdf, replacing the forward-slash (ASCII #47) character with a space.



## Downloading all sheets as a PDF File

CDP Data Visualization (CDV) 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.

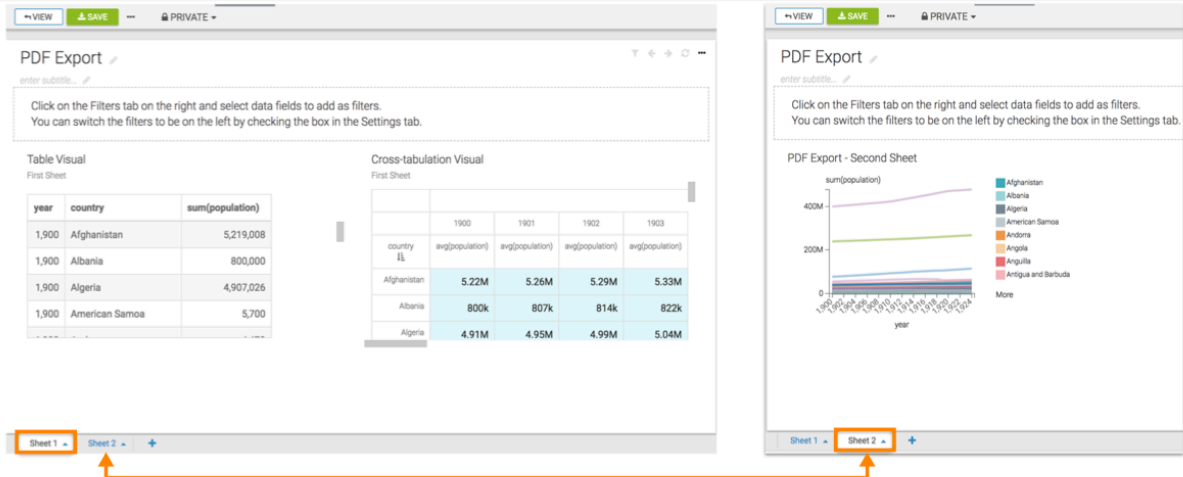
In the following example, you can see how to download Sheet 1 and Sheet 2 of the dashboard on separate pages.

### 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 .

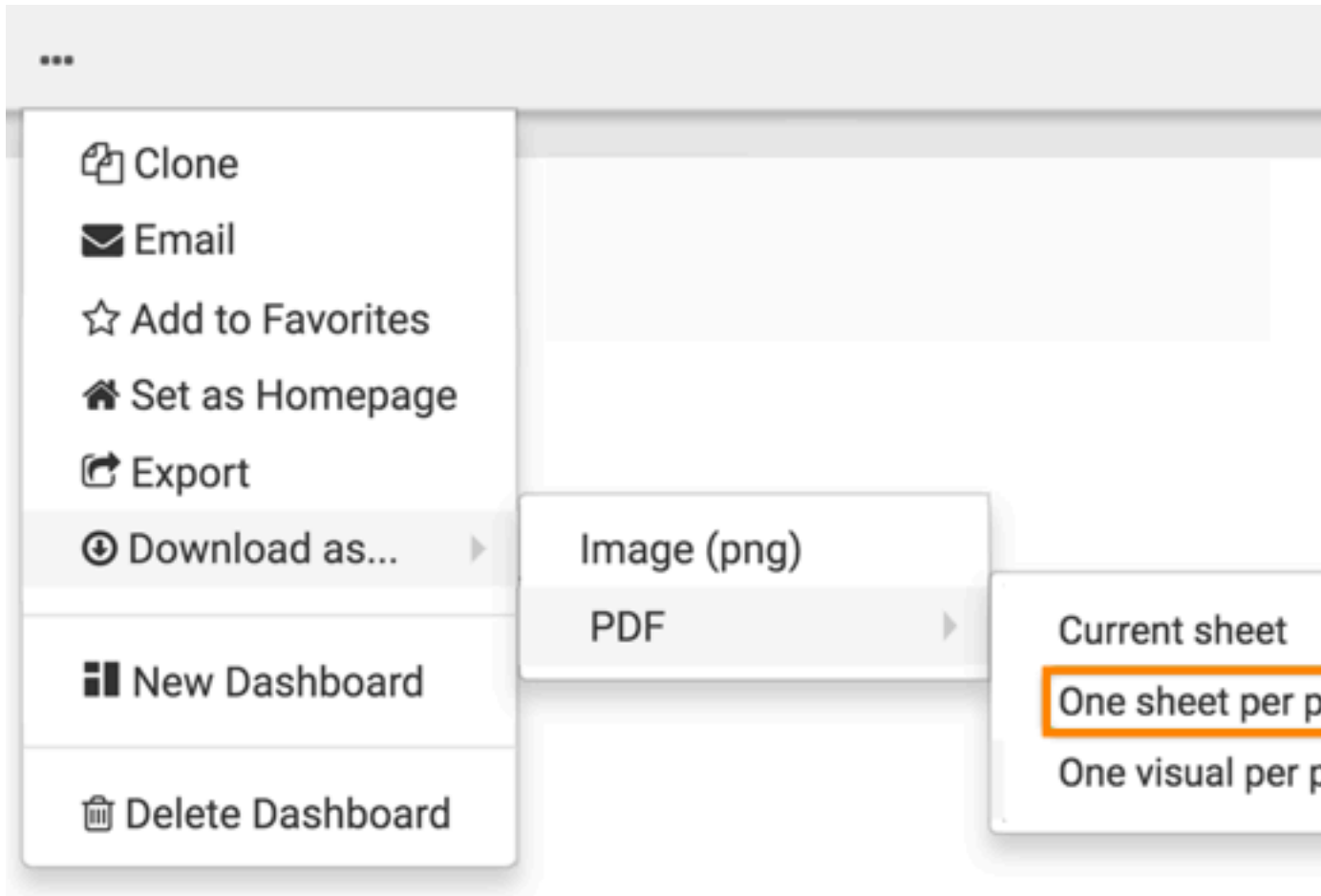
### Procedure

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. CDP 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:** 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\_XXXXXXXXXXXXX.pdf, replacing the forward-slash (ASCII #47) character with a space.

The screenshot displays a PDF viewer interface. At the top, the title bar shows the filename "PDF Export\_20190205142719.pdf (page 1 of 2)" highlighted in orange. Below the title bar is a toolbar with icons for View, Zoom, Share, Highlight, Rotate, Markup, and Search. The main content area is divided into two pages. The top page, labeled "PDF Export", contains two tables: "Table Visual" and "Cross-tabulation-Visual". Both tables have the same data:

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

The bottom page, also labeled "PDF Export", shows a line chart titled "Table Visual" with "sum(population)" on the y-axis and "year" on the x-axis. The chart displays population trends for various countries, with a legend on the right listing: Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, Antigua and Barbuda, and More. The "Sheet 1" tab at the bottom of the top page and the "Sheet 2" tab at the bottom of the bottom page are both highlighted in orange.

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 as a PDF file

CDP Data Visualization (CDV) 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:**

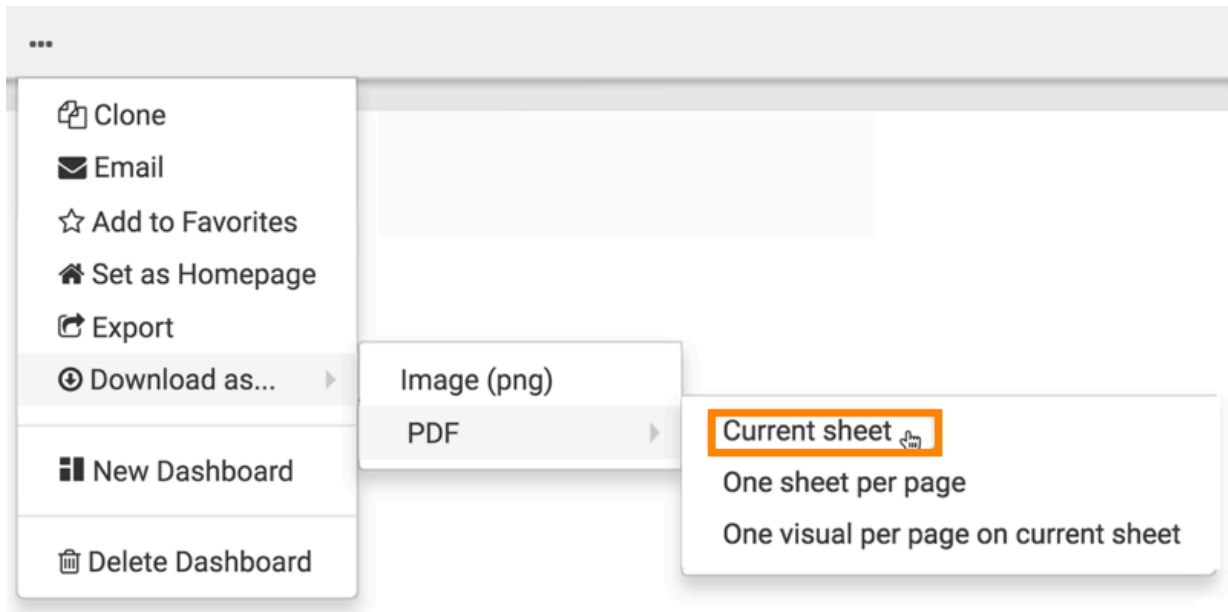
- This feature is available only when thumbnails are enabled .
- For snapshots of custom JS visuals, we support only ECMA Script 5 for Javascript.
- For filtered visuals, the filter must have app scope.

### 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.

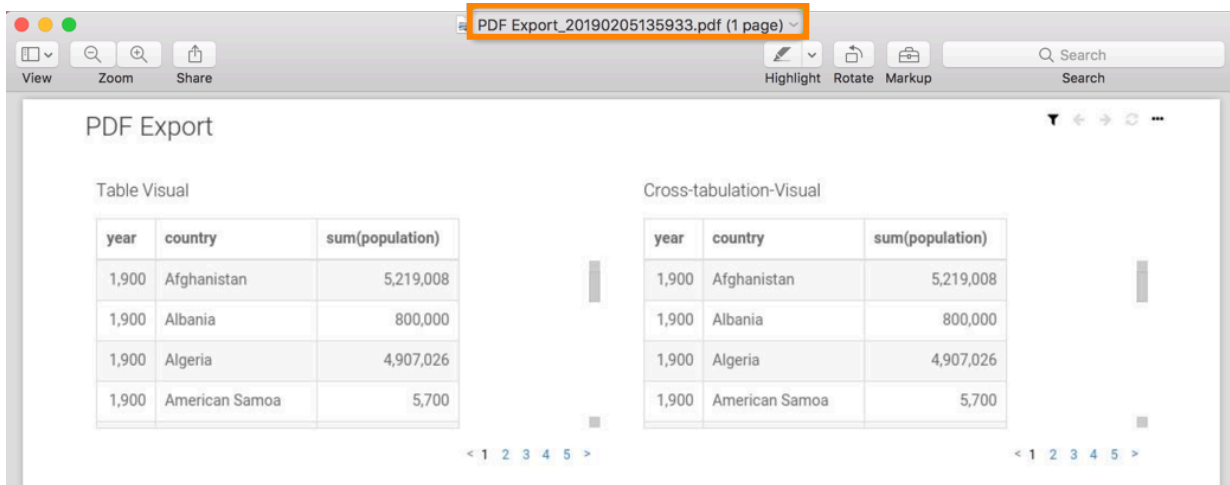
- After the download is complete, open the default download folder on your computer. Data Visualization saves the current sheet to a PDF file.

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:** CDP 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\_XXXXXXXXXXXXX x.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.

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

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

CDP Data Visualization (CDV) 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.

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-tab**  
First Sheet

country

Afghanis

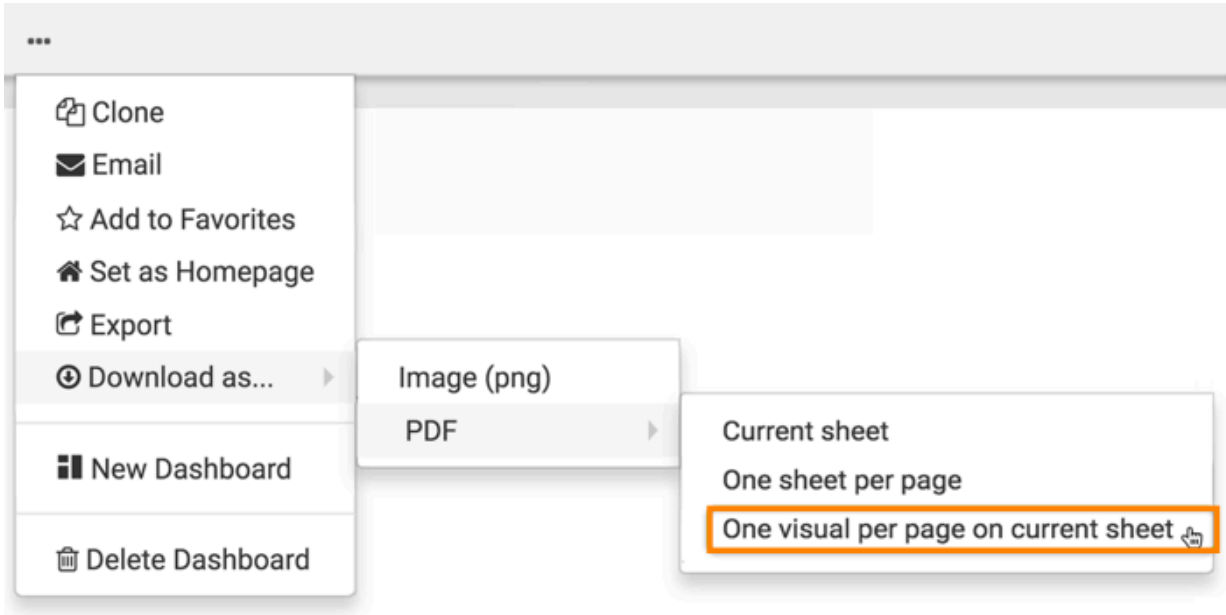
Alba

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.

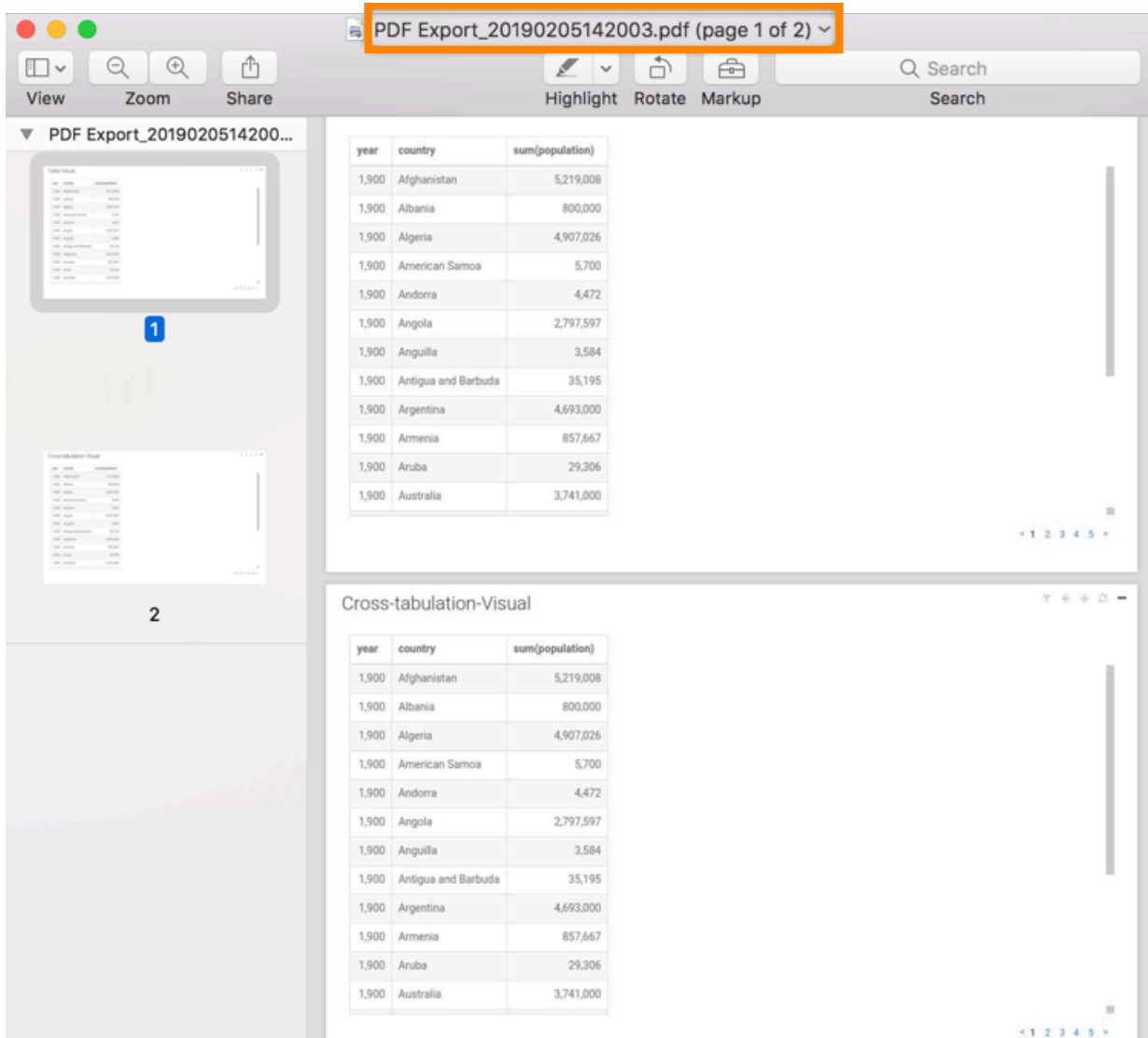
- After the download is complete, open the default download folder on your computer. CDP Data Visualization saves the current sheet to a PDF file.

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:** 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\_XXXXXXXXXXXXX.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. Each visual in the current sheet is on a separate page.

## Emailing sheets

CDP Data Visualization enables you to share sheets through emails. 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

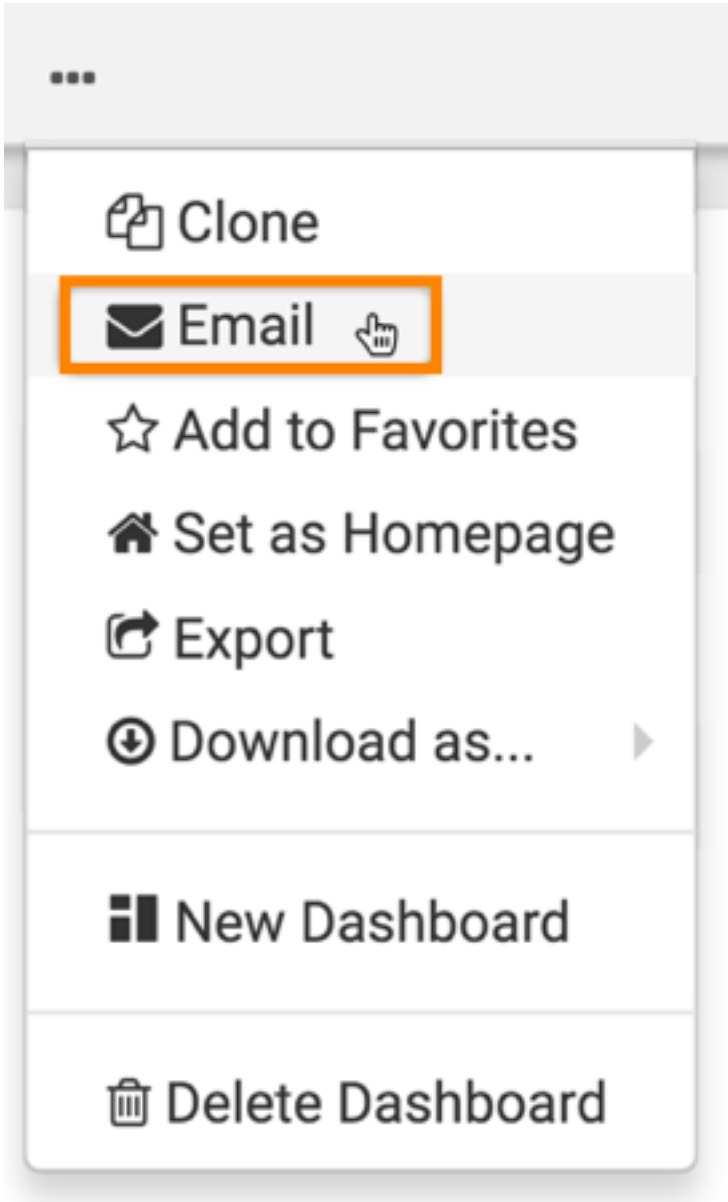
Review the necessary prerequisites in [Emailing dashboards, sheets, and visuals](#).

To email a sheet, its parent dashboard can be in either View or Edit mode.

### Procedure

1. Select the sheet you want to move by clicking on its tab, at the bottom left corner of the interface. Here, we choose the second sheet of the dashboard.

2. At the top right corner of the dashboard, click the (supplemental) menu, and select the Email option.



The Email Current Sheet window modal appears.



3. Choose one of the options for sending an e-mail.

The Email Current Sheet modal has three primary options:

- a. Email now
- b. Schedule Email
- c. Email based on threshold

### Email Current Sheet

1  
 Email now

2  
 Schedule Email

3  
 Email based on threshold

**Email Detail**

**To\***

**CC**

**From** arcadia\_admin@arcadiadata.com

**Subject\***

**Email Template**

Preview Email Template

**Message**

Show Job Parameters

**Attach**  Embedded Image  PNG  PDF  CSV

**Page Parameters**  Include page parameters  Do not include page parameters

---

[Go to Jobs page to view status](#)

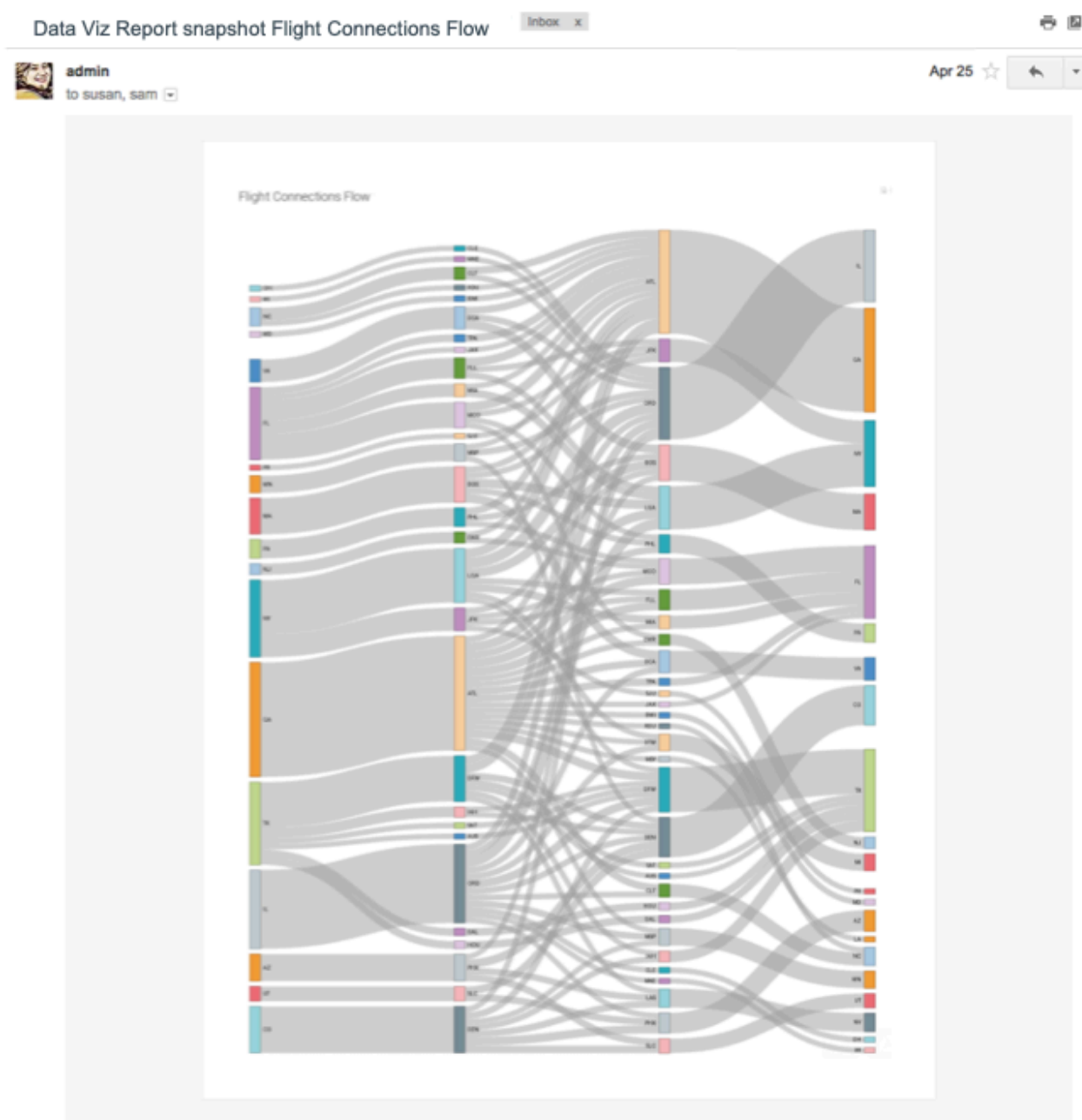
CANCEL

SEND

### What to do next

After creating emails, you can monitor them in the Jobs interface, review their details, rerun, cancel, and so on. See [Managing Jobs](#).

A sample email may appear something like this:



## Deleting a sheet

CDP Data Visualization enables you to delete sheets from a dashboard.

### Procedure

1. Open a dashboard in Edit mode.
2. Click the sheet you plan to remove.

3. In the sheet management menu, select the Delete option.

CLouDERA  
Data Visualization

HOME VISUALS DATA

VIEW SAVE PRIVATE

### World Life Expectancy

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.

#### Total GDP

GDP per UN Region

Year	Region 1	Region 2	Region 3
2000	12.0T	15.0T	18.0T
2001	13.0T	16.0T	19.0T
2002	14.0T	17.0T	20.0T
2003	15.0T	18.0T	21.0T
2004	16.0T	19.0T	22.0T
2005	17.0T	20.0T	23.0T
2006	18.0T	21.0T	24.0T
2007	19.0T	22.0T	25.0T
2008	20.0T	23.0T	26.0T

#### Relative GDP over the years

Oceania

- Rename
- Clone
- << Move Left
- Move Right >>
- Delete**

Low GDP High GDP Relative and Cumulative GDP

## Results

After saving the dashboard, you can see that the deleted sheet is no longer visible at runtime.