

Workbooks and Sheets - SKY Analytics

Last Modified on 03/02/2022 10:47 am CST

A workbook contains sheets which can be a worksheet, a dashboard, or a story. A Dashboard is a collection of views from multiple worksheets.

Creating Worksheets, Dashboards, or Stories

There are multiple options when setting up new Worksheets, Dashboards, and Stories:

- Select **New Worksheet**, **New Dashboard**, or **New Story** at the bottom of the workbook.
- Go to *Worksheet / New Worksheet* or *Dashboard / New Dashboard* at the top of the menu.
- Right-click any open workbook tab and select **New Worksheet**, **New Dashboard**, or **New Story**.
- On the toolbar, select the drop-down arrow on **New Worksheet** and select **New Worksheet**, **New Dashboard**, or **New Story**.

Renaming Worksheets, Dashboards, Stories, or Sheets

- To rename a Worksheet, Dashboard, or Story, right-click the tab then select **Rename**.
- To rename an active sheet, right-click, the sheet in the *Sheet* tab at the bottom of the workbook and select **Rename Sheet**. Another option is to double-click the sheet name in a *Sheet* tab, enter the new name, and select **Enter**.

Undo, Redo, or Clear Sheets

- To move backward, select **Undo** on the toolbar. Selecting **Redo** moves forward.
 - To remove all fields, formatting, sizing, axis ranges, filters, sorts, and context filters in the sheet, select **Clear Sheet** on the toolbar. To clear specific aspects, use the *Clear Sheet* drop-down menu.
- Note:** Clear commands on the toolbar do not clear history. Select **Undo** to revert a clear command.

Duplicate Worksheets, Dashboards, Stories, Sheets, and Crosstabs

- Right-click the sheet tab and select **Duplicate** to create a new version of a Worksheet, Dashboard, or Story with the same fields and settings. Changes to the duplicate do not affect the original. New versions of Dashboards reference original Worksheets used to create the Dashboard.
- A Crosstab or Pivot Table summarizes data in rows and columns of text. To create a new Crosstab sheet, right-click the sheet tab and select **Duplicate as Crosstab** or go to *Worksheet / Duplicate as Crosstab*. A new worksheet added into the workbook is populated with a crosstab view of the data from the original Worksheet. Dashboards and Stories cannot be duplicated as Crosstabs.

View Underlying Data in a Sheet

- Hover over or select a *Mark* to display the associated data in a tooltip. With the tooltip open, select **View Data**.
- Right-click the view with no Marks selected and choose **View Data**.
- Copy and paste the data into Excel or another application. To export underlying data, select **Download all rows as a text file**.

Delete Sheets

- Delete a sheet to remove it from the Workbook. One Worksheet per Workbook must remain. Worksheets used in a Dashboard or Story cannot be deleted but can be hidden.
- To delete the active sheet, right-click the *Sheet* tab and select **Delete**.

