






# Analytics Authoring - Creating and Editing Dashboards

Last Modified on 05/10/2024 9:50 am CDT

Those designated as Analytics Authors have the ability to create and edit dashboards in SKY Analytics.

SKY Admins have the ability to see who is set up as an Analytics Author by editing the User in [Admin](#). The setting cannot be edited in SKY. To enable or disable this setting, reach out to an SSI Sales representative.

-  **Grower360 Admin**  
Grower360 Admins can manage Grower360 users and settings
-  **Order Admin**  
Order admins can manage settings related to entering orders in SKY
-  **Company Admin**  
Company Admins can manage SKY users and their access to SKY features
-  **Task Center Admin**  
Task Center Admins can manage and assign tasks in the Task Center
-  **Analytics Author**  
Analytics Authors can create, edit, and save custom dashboards within the Company Content folder. If you would like to have Authoring enabled or disabled for this user, please reach out to your SSI Sales representative.

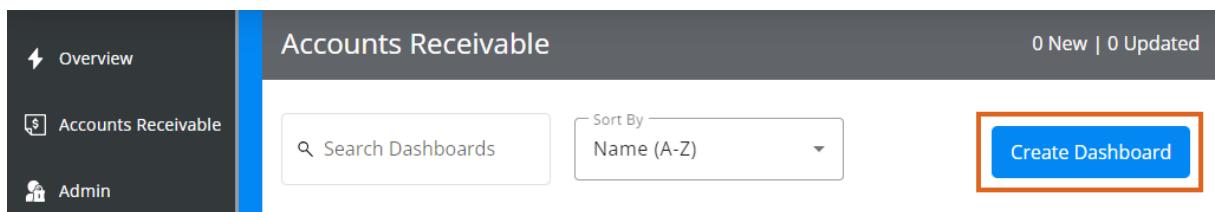
Terminology and menu options can be found at:

- [Web Authoring Terminology - SKY Analytics](#)
- [Web Authoring Toolbar Reference - SKY Analytics](#)

## Create a Dashboard

If there is a need for a dashboard that is not currently available, one can be created.

1. In the upper right, choose **Create Dashboard**.



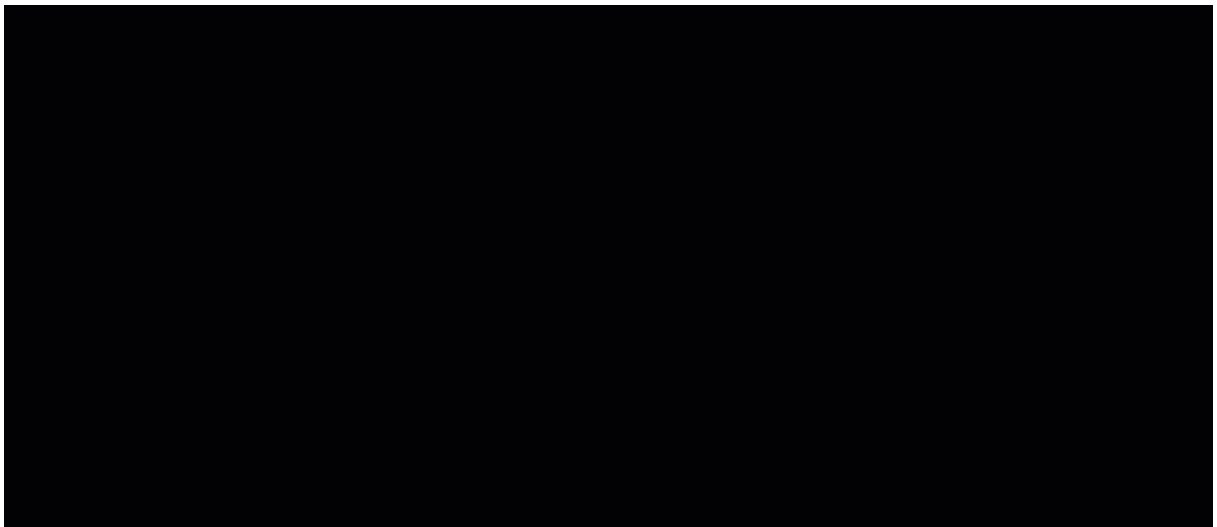
2. The *Connect to Data* window displays. The data source determines which data fields are available to select when building the dashboard. Highlight the appropriate row then choose **Connect**.

## Connect to Data

Type	Name	Workbooks	Live/Last Extract	Connects To	Location	Owner
	RLS_Login_Location	48	May 1, 2023, 11:14 AM	awsdata.agvance.net,50149	Admin	API Admin User
	RLS_Customer_Location	30	Mar 3, 2023, 1:55 PM	awsdata.agvance.net,50149	Admin	API Admin User
	Sales Invoice	19	Nov 17, 2023, 11:51 AM	awsdata.agvance.net,50149	Accounts Receivable	API Admin User
	RLS_Products_Location	15	May 2, 2023, 3:27 PM	awsdata.agvance.net,50149	Admin	API Admin User
	Customer Classification	12	Feb 16, 2023, 1:02 AM	awsdata.agvance.net,50149	Customer	API Admin User
	Product Classification	8	Feb 16, 2023, 12:06 AM	awsdata.agvance.net,50149	Customer	API Admin User
	RLS_Profit_Centers_Location	6	May 11, 2023, 2:50 PM	awsdata.agvance.net,50149	Admin	API Admin User
	RLS_GL Category_Location	5	May 3, 2023, 10:24 AM	awsdata.agvance.net,50149	Admin	API Admin User
	Product Bookings	4	Feb 16, 2023, 12:04 AM	awsdata.agvance.net,50149	Customer	API Admin User

Connect

- The dashboard is built by dragging data elements to the *Columns* and *Rows* shelves. It is highly recommended to walk through this [eLearning](#) for more information on this process. Additionally, see the video at [Web Authoring - SKY Analytics](#).



- Select **Publish As** when the dashboard is set up as desired.
- On the *Publish Workbook* window, enter a *Name* then make sure *Company Content* is selected. This makes the dashboard available to those with access to the *Company Content* area in Analytics.

Publish Workbook

×

Name

Workbook Name

Location

▼ Projects

Accounts Receivable

Admin

Agromony

Company Content

Customer

Energy

Grain

Ledger

Logistics

☒ Show sheets as tabs

☐ Embed password for data source

Workbook Optimizer

Cancel

Publish

6. Optionally check *Show sheets as tabs* and/or *Embed password for data source*.

7. Choose **Publish**.

## Edit a Dashboard

To make edits to a dashboard, navigate to that dashboard and select **Edit Dashboard** in the lower right.

Aged Balances

Grower Balances

What are the aged invoices by grower?

Dashboard honors user restrictions based on customer location

ID	Grower Name and ID	Over 90	61-90
2Johto	Tom Johnson (2Johto)	\$12,313	
999999	Tommy Tester (999999)	\$3,020	\$750
Cryst	Crystal Creek Farms, Inc. (Cryst)	\$1,690	
CowBo	Bob Cowgill (CowBo)	\$1,350	
HamHe	Helen Hammond (HamHe)	\$1,000	
TripA	Triple A Farms (TripA)	\$900	
WilJa	Jake William (WilJa)	\$870	
SmiJo	Joe Smith (SmiJo)	\$800	
KRBeef	K & R Beef (KRBeef)	\$700	
DunRob	Robert Dunphy (DunRob)	\$600	
ThoFr	Frank Thompson (ThoFr)	\$500	
AllIam	All American Farms (AllIam)	\$400	
ZuzSa	Samuel Zuzzle (ZuzSa)	\$300	
SmiRy	Ryan Smith (SmiRy)	\$200	

View: Original

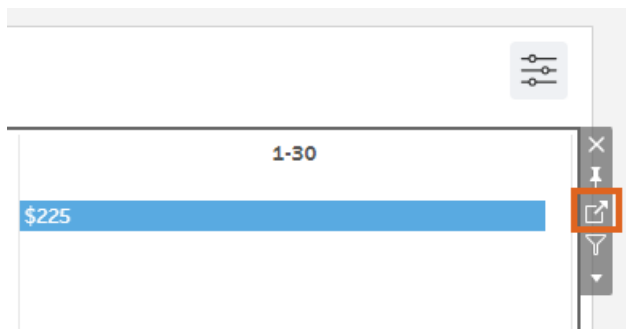
Watch

Share

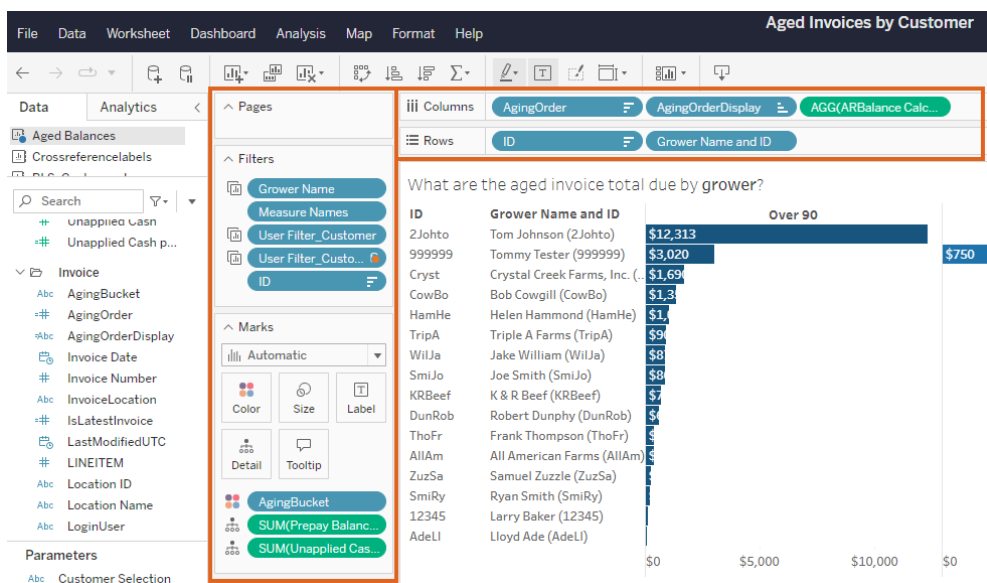
Exit

Edit Dashboard

1. Select the worksheet needing edited then choose the **Go to Sheet** icon.



- The dashboard is built by dragging data elements to the *Columns* and *Rows* shelves. It is highly recommended to walk through this [eLearning](#) for more information on this process. Additionally, see the video at [Web Authoring - SKY Analytics](#).



- Once all edits have been completed, select **Publish As**.
- On the *Publish Workbook* window, enter a *Name* then choose *Company Content*. This makes the dashboard available to those with access to the *Company Content* area in Analytics.

**Publish Workbook** ✕

**Name**


**Location**

▼ Projects

- Accounts Receivable
- Admin
- Agronomy
- Company Content**
- Customer
- Energy
- Grain
- Ledger
- Logistics

☒ Show sheets as tabs

☐ Embed password for data source

 Workbook Optimizer

5. Optionally check *Show sheets as tabs* and/or *Embed password for data source*.
6. Choose **Publish**.