

Common actions

From registered files to workbooks, most objects in Kyvos share a set of common actions. These common actions include:

- adding
- renaming
- copying in the same or a different location
- editing
- saving or using save as
- deleting
- sharing
- working with folders
- adding a note to an object
- adding a notification to an object (for example, send an email when this object changes)
- previewing
- refreshing data
- validating
- showing related entities
- setting properties
- scheduling builds
- viewing build results and build histories
- creating a profile



Kyvos uses roles to control access to product features. Depending on your role, you may not have access to all of the features shown in this guide.

If you don't have read access to an object such as a cube or workbook, you will see a message that it is read-only when you open the object. If you make changes, you need to use **Save As** or your changes will be lost.

The steps to do these actions are the same regardless of the type of object you are using. For some of these object types, you can select multiple items using Control+shift. Depending on the object type, you may be able to copy, move, or delete multiple items at a time.

Objects types include:

- Files
- Datasets
- Relationships
- Cubes
- Workbooks

You can also access additional object types that are part of workbooks. Select a workbook, then you can select:

- Worksheets
- Dashboards



TIP

Not sure if something is an object or what you can do with any particular object? Right-click it to display a menu of available options.

Here are the common actions:

- [Working with objects](#)
- [Adding an object](#)
- [Duplicating an object](#)
- [Editing code](#)
- [Filtering data](#)
- [Opening an object](#)
- [Deleting an object](#)
- [Moving an object](#)
- [Previewing an object](#)
- [Refreshing data](#)
- [Renaming an object](#)
- [Subscribing to object notifications](#)
- [Adding a note to an object](#)
- [Sharing an object](#)
- [Validating an object](#)
- [Working with folders](#)
- [Changing workspace settings](#)
- [Scheduling builds and viewing build histories](#)
- [Setting properties](#)

- [Viewing email histories](#)
- [Set as Landing Page](#)