

Content Folders

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Overview

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Content is stored within a two tier folder structure of Folders and Sub Folders.

- **Folders** are used to hold and split Sub Folders into groups. They do not contain content directly.
- **Sub Folders** are located within a defined Folder and are used to store content with specified function and access permissions.

The content types that are stored in this structure are Reports, Dashboard tabs, Storyboards, and Data transformation flows.



Ensure that you create both a folder, and a sub folder before you save your content.

Content Folders are managed through the [Admin Console](#).

Content Folders			
Search Folders			
Training		✓	×
	Training Examples	🔒 ✓	×
Tutorial		✓	×
	Athletes	🔒 ✓	×
	Camp	🔒 ✓	×
	Draft	📁 ✓	×
	KPIs	🔒 ✓	×
	Marketing & Booking	🔒 ✓	×
			Add

Folder Creation

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To create a Content Folder, click the **Add** button under the Content Folders list in the Admin Console. You will now be taken to the Folder setup page, where you will need to define the following:

1. **Folder Name:** this will be the name of the folder displayed in various parts of the system when saving and viewing content.
2. **Description:** this will be the description of the folder, used to define its intended purpose and audience.
3. **Level:** leave this with **Folder** selected. The Folder level needs to be created before any Sub Folders can be defined.
4. **Sort Order:** defaults to zero, provide a numeric sort order if you do not wish the folders to be sorted alphabetically.
5. **Status:** when the Folder is ready to be seen by users set the status to **Active**. When **Draft** only administrators will be able to view and edit it, and it can't be used for storage.

Click **Save** to complete the Folder. Next, you will need to create a Sub Folder.

Content Folder

Provide a name and description for the folder

Folder name:	Athletes
Description:	Reports exploring athlete information
Level:	Sub Folder
Parent Folder:	Tutorial
Draft Content Storage:	☐
Sort Order:	0
Status:	☐ Draft ☒ Active

Sub Folder Creation

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Once at least one Folder has been created, click the **Add** button under the Content Folders list in the Admin Console to start defining Sub Folders. You will now be taken to the same Folder setup page, where you will need to define the following:

1. **Folder Name:** this will be the name of the folder displayed in various parts of the system when saving and viewing content.
2. **Description:** this will be the description of the folder, used to define its intended purpose and audience.
3. **Level:** select the **Sub Folder** option. Once changed, a range of different options will become available.
4. **Parent Folder:** select the **Folder** this Sub Folder will be stored within.
5. **Draft Content Storage:** there can be one default Draft sub folder in the system, which will contain all draft content until a different sub folder has been selected by the content writer. This is used to keep all draft content in one place, making it easier to keep the system organised.
Note: enabling this option means that any content that is not activated is automatically stored in this Sub Folder. There can only be **one** Draft Storage folder.
6. **Sort Order:** defaults to zero, provide a numeric sort order if you do not wish the folders to be sorted alphabetically.
7. **Status:** when the Sub Folder is ready to be seen by users set the status to **Active**. When **Draft** only administrators will be able to view and edit it, and it can't be used for storage.

Content Folder

Provide a name and description for the folder

Folder name:

Description:

Level:

Parent Folder:

Draft Content Storage: ☐

Sort Order:

Status: ☐ Draft ☒ Active

Now that the **Level** has been set to **Sub Folder** the following sections will need to be defined. These relate to content settings and as such only correspond to the sub folder level, as the folder level can't directly contain content.

Publish Access & Approvals

This section allows you to determine which users can publish public reports to the folder.

- If you select **Users with Functional Access** then all users with the public report function can write to this folder
- If you select **Experts only or with Expert Approval** then only specified users can publish reports into that folder. If a user does not have access to publish to that folder the report will be routed to an Expert for approval. This allows administrators and advanced users to approve all reports stored into the folder before they are activated for public consumption, ensuring they are correct and the data can be trusted.

Publish Access and Approvals

Who should be able to publish public Reports to this folder?

Publish Rights: ☐ Users with Functional Access
☒ Experts only or with Expert approval

Expert:

Report Version History

The system has the ability to maintain historical result sets for reports. When a user selects this option not only is the report definition saved but the data as well. This allows users to view previous versions of the report and compare result sets.

All versions of the report data are stored in the Yellowfin Database. As the administrator you can determine how much history and the maximum size of reports you wish to save. This is an application management process that permits you to control the use of your infrastructure.

Version History	The version history allows you to store the data returned in a report. If version history is set to Only keep the latest result set then no historical results will be kept. If the Keep archived report result sets option is selected then all historical versions of the reports will be kept. Note: It's important to remember that this option can quickly build up quite a large amount of data, so use this option sparingly.
Max Size	The maximum size for data to be saved in cache or in the database where version history is required.
Max Items Displayed	The maximum number of items to be displayed on the history drop down list for management information reports.
Delete Period	After what period of time should archived reports be deleted.

Report Version History

How should archived report result sets be handled?

Version History: ☐ Only keep the latest result set
☒ Keep archived report result sets

Max Size for cached data: KB

Items Displayed: (Max)

Delete Period: (Archived results will be deleted)

Content Security Access

Sub Folders can be secured to restrict access to the content they contain based on specified permissions. The options for setting the security are as follows:

1. **Unsecure Content:** people can access this without logging on.
2. **Secure:** users will have to logon before being able to view the content, but all users of the system will be able to view it.
3. **Access Security Level Required:** only selected users will be able to access this content.

If you choose to secure the sub folder then you must select a person or group and then the level of access that they are permitted. Three types of access exist:

Read	Users will only be able to read the content but not create new items of this type of content.
Edit & Update	If a content item exists a user will be able to edit and update an existing piece of content but not create new or delete items in this folder. They will also be able to read all content in this folder.
Delete	Users with delete access will be able to read, edit, create and delete content of this type. You must have at least one person with delete access.

Note: if you want all your users to be able to read the item make sure you have a group created with all your users. Use this group for read access.

When you have selected a person and/or a group click add to append them to the access list. You can have as many groups and people in the list as you wish. You cannot finish the process if you do not have at least one person or group with delete access. Select a person with delete access to finish.

Content Security and Access

Who should have rights to access Content in this folder?

Security Type:

Access Security Level Required ▾

Only users with the right level of Access Security can access this content.

Member Selection		
Add:	Search	
Access List:		
Administrators	Delete ▾	×
Users	Read ▾	×

Primary Org Content Security

When using [Client Org](#) functionality you are able to secure Content Sub Folders at the Primary Org by assigning access to User Groups created at the Client Org level. This will allow Administrators to restrict Primary Org content to specified users in each Client Org, rather than all Primary Content being available to all Client Org users.

Edit Folder/Sub Folder

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To make changes to a Folder or Sub Folder simply locate it on the Admin Console page and click on its name.

Search Folders		
Training	✓	×
Training Examples	✓	×
Tutorial	✓	×
Athletes	✓	×
Camp	✓	×
Draft	✓	×
KPIs	✓	×
Marketing & Booking	✓	×

Delete Folder/Sub Folder

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To delete a Folder or Sub Folder simply locate it on the Admin Console page and click on the x next to it in the list.

Search Folders		
Training	✓	×
Training Examples	🔒 ✓	×
Tutorial	✓	×
Athletes	🔒 ✓	×
Camp	🔒 ✓	×
Draft	📁 ✓	×
KPIs	🔒 ✓	×
Marketing & Booking	🔒 ✓	×

From here you will be required to confirm the deletion. If, however, the folder contains content you will be informed that this content must be moved or deleted before the folder can be.

 This folder is being used by:

- 39 Reports
- 5 Dashboards
- 1 Storyboards

You must delete or move this content before deleting the folder.

Ok

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