

Storyboard Settings

- Overview
 - Save
 - Copy
 - Delete
- Settings Menu
- Style
 - Settings
 - Theme
- Data
 - Global Filters
 - Refresh Data
- Sharing
 - Access

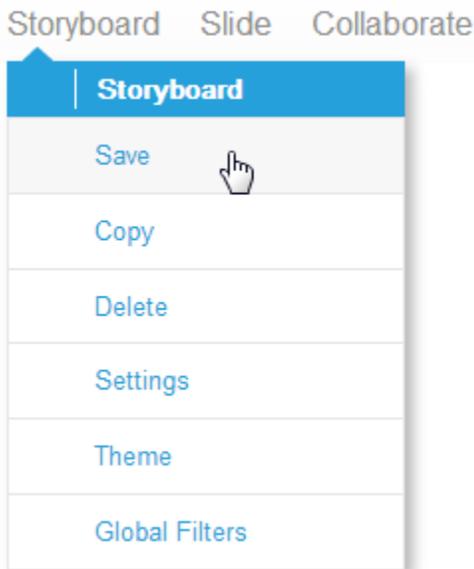
Overview

[top](#)

Save

Once you have built up your Storyboard you will need to Save it so that it can be used.

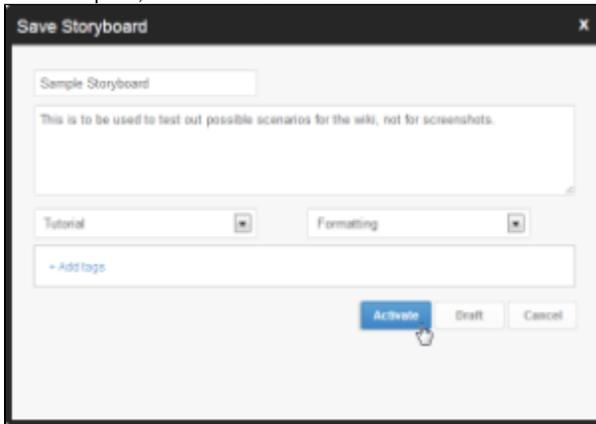
1. While in the Storyboard Builder click on the **Storyboard** menu and select **Save**



2. You will now see the **Save Storyboard** lightbox, where you will have to provide the following:
 - a. **Title** - This is the name of the Storyboard.
Note: changing the Title will change the Title text on the Storyboard's Title slide.
 - b. **Description** - This is the description displayed when viewing the Storyboard on the Browse page.
 - c. **Category & Sub Category** - Storyboards are saved in the same location as reports, and you will need to select where you what your Storyboard saved.

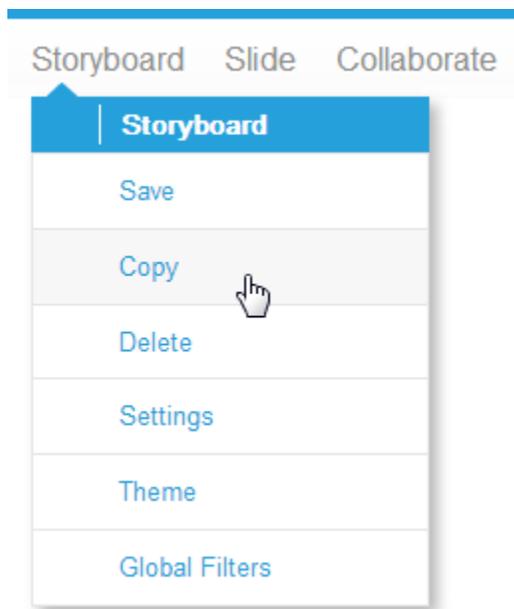
See [Content Folders](#) for more information.

3. Once complete, click **Activate**



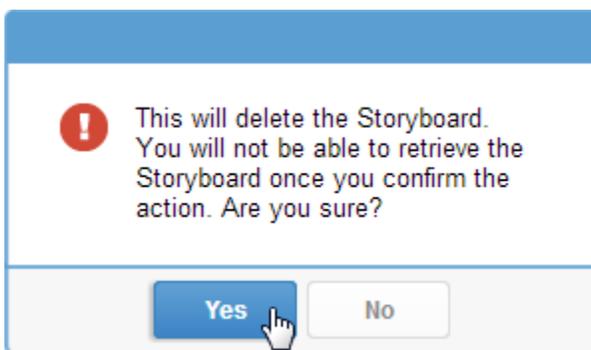
Copy

Clicking **Copy** in the Storyboard Menu will create a completely separate copy of your current Storyboard, much the same as the Report Copy function.



Delete

Clicking **Delete** in the Storyboard Menu will allow you to remove the Storyboard from your instance, prompting a confirmation message:

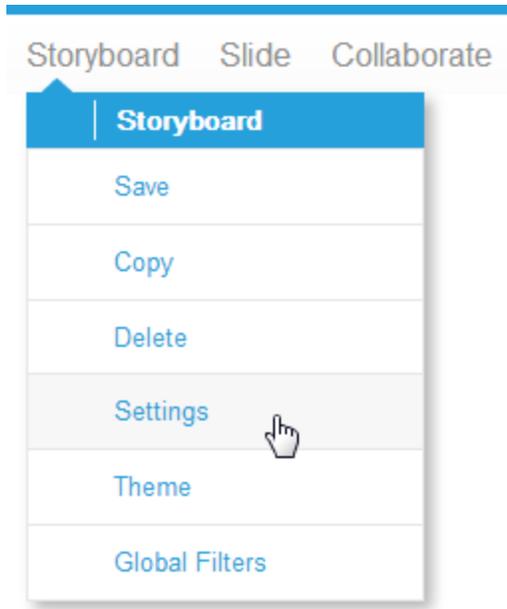


Click **Yes** to delete or **No** to cancel.

Settings Menu

[top](#)

The Storyboard Settings Menu allows you to access all the configurable options in one place. Click on Storyboard in the top right menu bar and click on Settings.

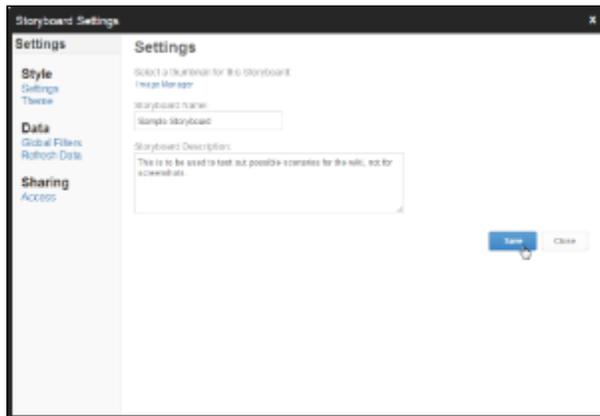


The options available through this menu are detailed below.

Style

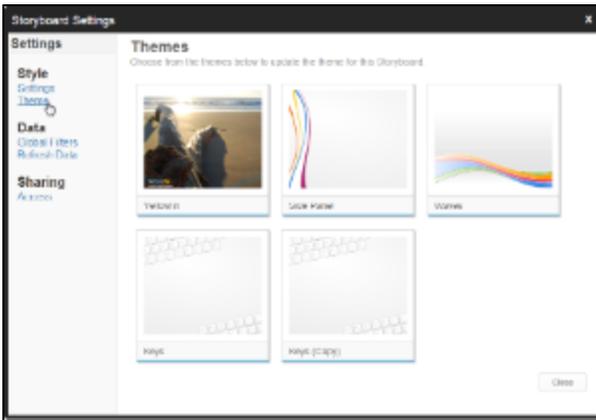
[top](#)

Settings



1. **Thumbnail** - Select or upload an image file to be used as a Thumbnail for the Storyboard. This will be displayed when viewing content on the Browse page. It is recommended that you select an image that will allow users to easily identify it from other Storyboards.
2. **Storyboard Name** - This is the Name of your Storyboard, used in the Browse page. It's also used as the Title text on the Storyboard's Title slide.
3. **Storyboard Description** - This is used on the Browse page when exploring content.

Theme



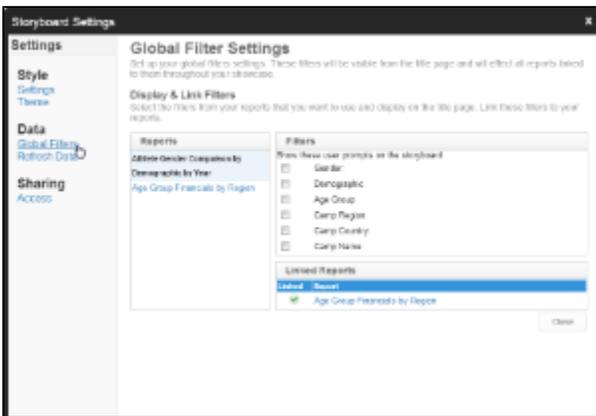
This section allows you to change the theme currently being used by the Storyboard. **Note:** If you change a theme used in a Storyboard you will need to select a new Theme Section for each Section Slide through the Slide Settings menu.

Data

[top](#)

Global Filters

Storyboard has the ability to use filters globally, across all reports contained in the presentation. This works in a similar manner to [Dashboard filters](#) that are shared across all reports on a Tab.

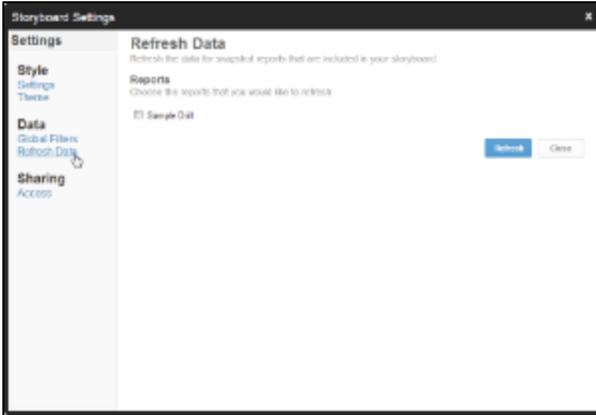


See [Storyboard Filters](#) for more information.

Refresh Data

When you choose to add a [Snapshot](#) report to your Storyboard, rather than the live data version, you will be able to refresh the data in the snapshot through the Settings menu.

1. Navigate to the Storyboard Settings Menu
2. Click on the **Refresh Data** option on the left navigation list
3. Select the snapshots you wish to refresh
4. Click the **Refresh** button



See [Snapshots](#) for more information on adding Snapshots to Storyboards.

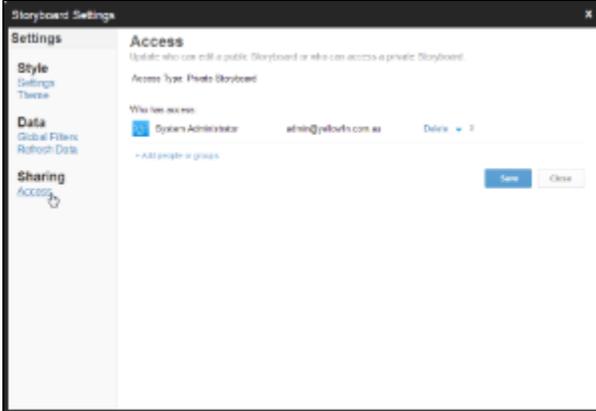
Sharing

[top](#)

Access

Like other content types in Yellowfin (Reports, Dashboard Tabs, etc) you have the option to restrict access to designated users of the system. By default, whichever user created the Storyboard will be set up with Delete access. Any further restrictions will have to be applied by the user.

1. Navigate to the Storyboard Settings Menu
2. Click on the **Access** option on the left navigation list
3. Select the User or Group you wish to provide access
4. Select the Access Level from **Read, Update, Delete**
5. Complete by clicking the **Save** button



[top](#)