Yellowfin Stories Basic

- Getting access to the Story module
- Understanding your Story Builder

Getting access to the Story module

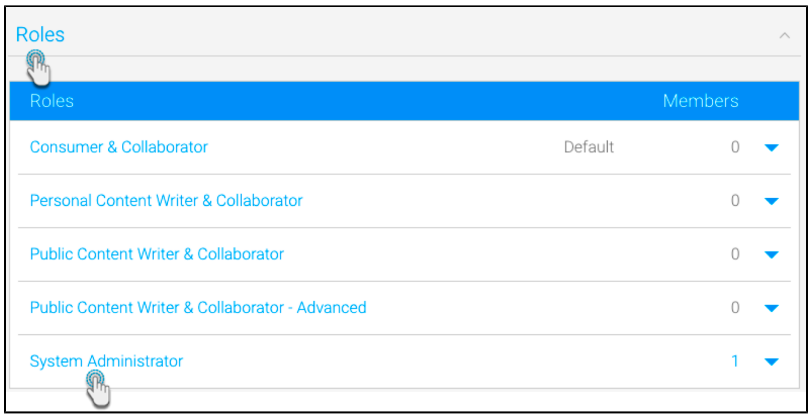
Ensure that users have access to the Story module by enabling the correct role functions.

Role Function	Description
Story CRUD	Allows users to view, create, edit or delete Stories.
Distribute Story	Allows users to share a published Story.
Story Admin	Allows users to edit and delete any private or public Stories.
External Content*	Allows you to embed content from external reporting tools.

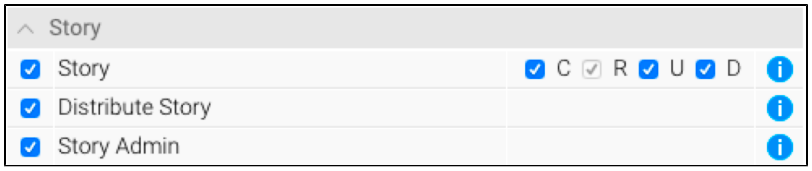
*Found under the 'General' section on the role functions page.

Administrators can enable/disable these role functions:

1. Access the **Admin Console** module, and on expanding the **Roles** tab, select the user role for which this functionality is to be enabled.



2. From the list of role functions, expand the **Story** tab, and select the checkbox for the Story role functions that you want to enable. See the list above for description of each.



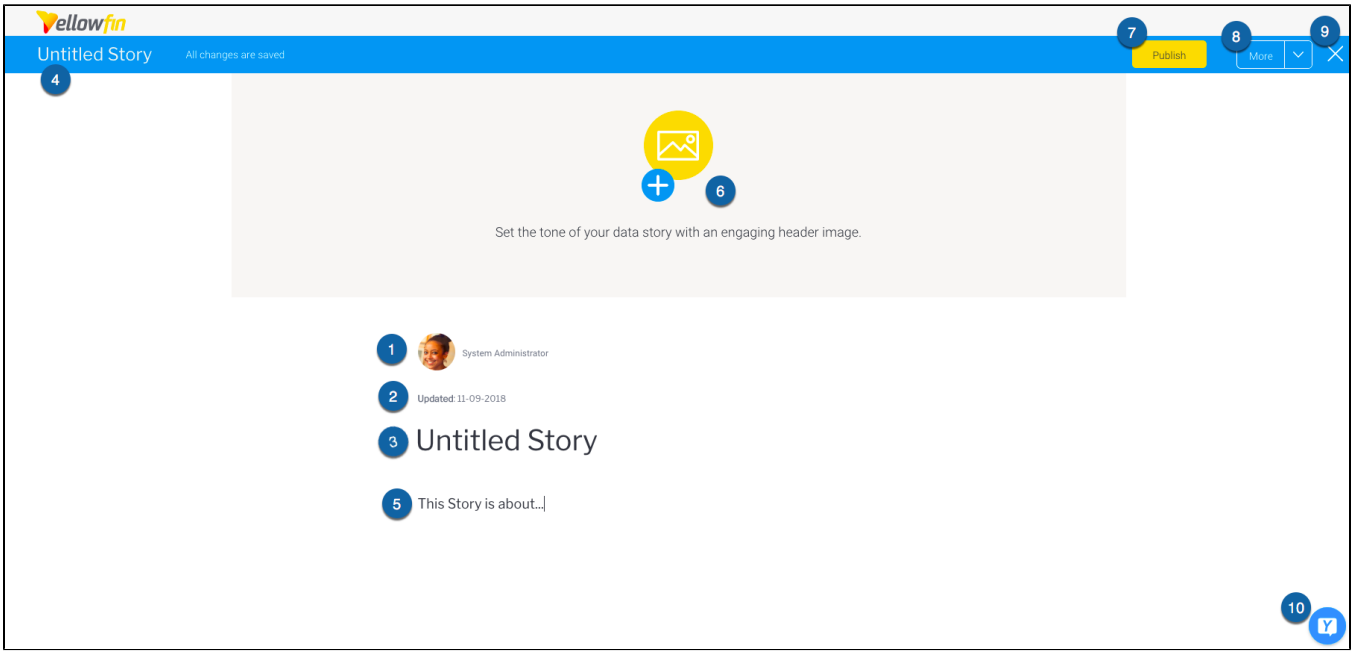
3. (Optional step) If you wish to embed reports from Tableau, PowerBI or other external reporting tools, then expand the **General** tab, and select the **External Content** role function.



4. Then click **Save** to ensure that this setting is saved.
5. All users assigned these roles will then be able to perform Story related functionality. However, currently active users will first need to log out of the system and then back in again for this to take effect.

Understanding your Story Builder

This section covers the different components and options that you will encounter in the Story module when in draft mode.



Note: Your Story Builder will not have some of these options visible when you first open it, until you start your story by entering text or a title.

No.	Component	Description
1.	User details	Details of the story author, that is the user who creates the story.
2.	Date*	Shows when the story was last modified.
3.	Story title	Used to enter or edit a story title.
4.	Story title display	The entered title of the Story is displayed here.
5.	Content line	Build your story by adding text and other story artifacts, including reports, snapshots, bookmarks, images, or videos.
6.	Header image	Adds/displays a header image at the top of your story.
7.	Publish button*	Use this Publish button to save and activate a story. Unless published, the story will remain in draft mode. Published stories can be viewed by all or specific users.
8.	More button*	Provides additional options to manage the story: • **Explore Linked Signal:** Leads to the related Signal of this Story. This option will appear if you have Yellowfin Signals as well. • **Preview:** Places the Story in preview mode. Click the Edit Story button to move back to draft mode. • **Collaborators:** To manage story editors and collaborators. • **Browse Stories:** To browse other Stories. • **Delete version:** Deletes only the draft version of the story. If a published version exists, it will not be deleted.
9.	Exit button	Exits the Story Builder and returns to the previous page.
10.	Activity Panel*	Brings up the Activity Panel to add comments and tasks to a Story.

*Option will become visible when your start creating your Story.