Comments, Tasks, and Decisions

Overview

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Yellowfin collaboration functions allow users to work together in a variety of ways, encouraging decision making and discussions related to content and business data. Comments, Decisions, and Tasks are available on content pages (Reports, Dashboard Tabs, and Storyboars), Discussion Streams, and Timelines.

Comments

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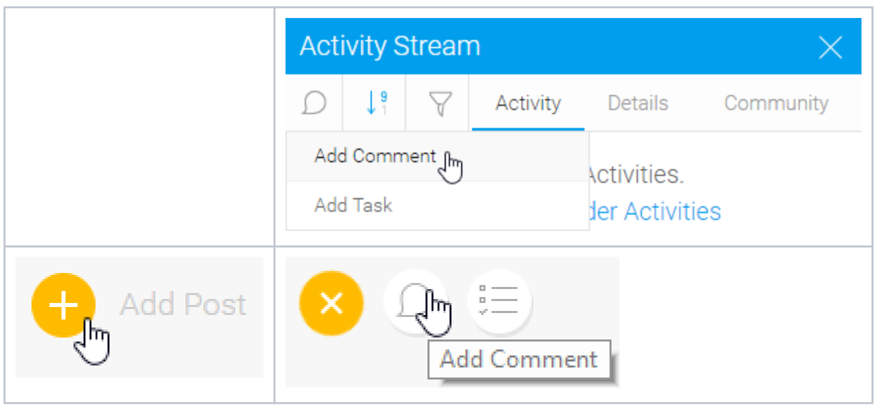
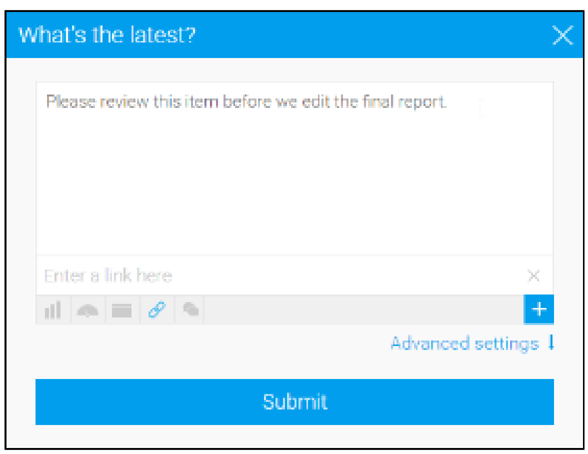
Comments can be added on a variety of pages, including content pages (report, dashboard, storyboard), discussion streams, and user timelines. In order to create a comment, follow these steps:

1. Click on the **Add Comment** option.

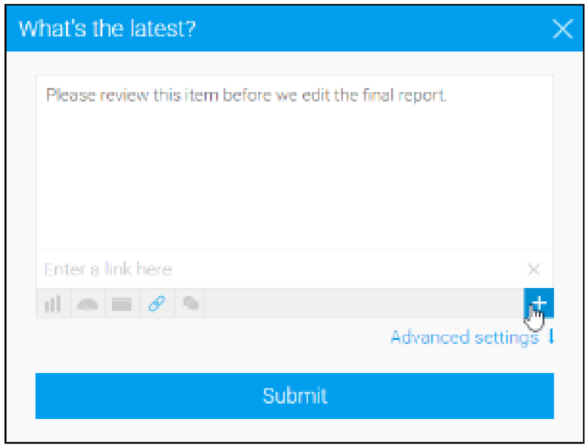


2. Enter the body text of your comment.



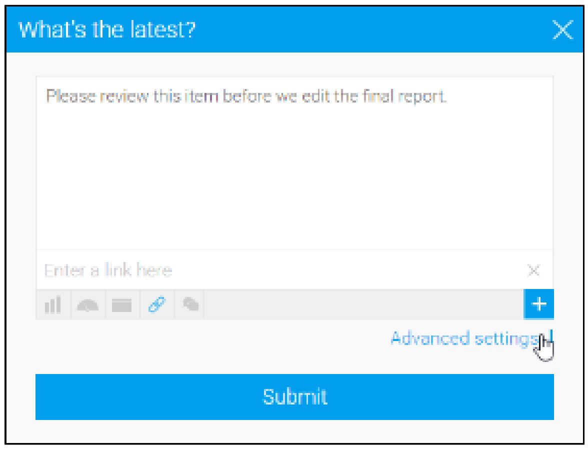
3. Add any attachments that may be required.

> *See Attachments for more information*

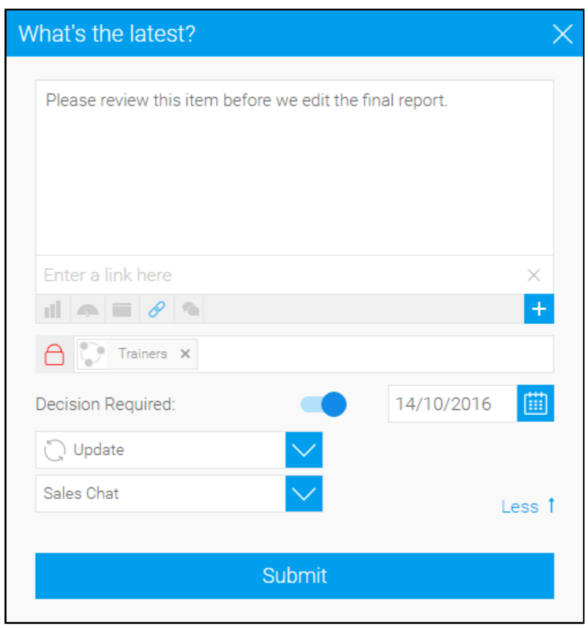


4. Open the **Advanced Settings** if they are required.

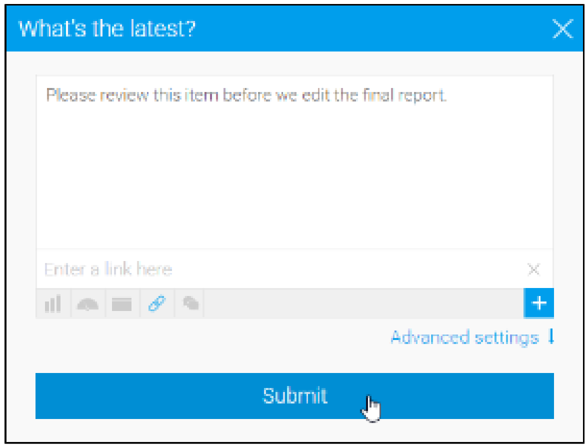
From here you can adjust:



- **Security** - this allows you to adjust if it's a **P ublic** post (meaning that it will rely on the content or stream security it belongs to), or **Private** post (allowing you to secure to specific users and/or groups).
- **Decision Required** - is allows you to define if a proposals and a decision are required within the thread. See Decisions for more information.
- **Type** - this allows you to flag the thread as one of the following:
  - Update
  - Opportunity
  - Issue
- **Stream** - allows you to specify which stream the post it attached to.



5. Click **Submit** to save your comment.



Decisions

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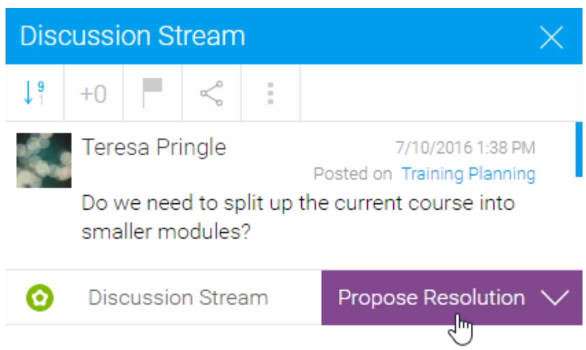
When a decision is required as part of the first post in a thread, responders will have the opportunity to propose solutions related to the decision, which can then be voted on and either accepted or rejected. In order to propose a solution, follow these steps:

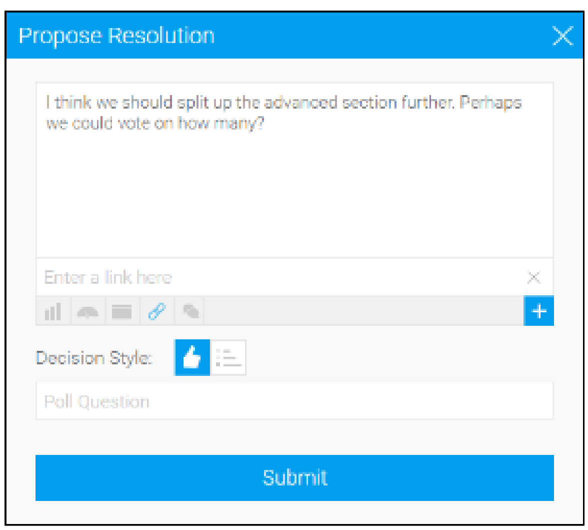
1. Click the **Propose Resolution** option



2. Enter the body text of your task request.

3. Add any attachments that may be required.

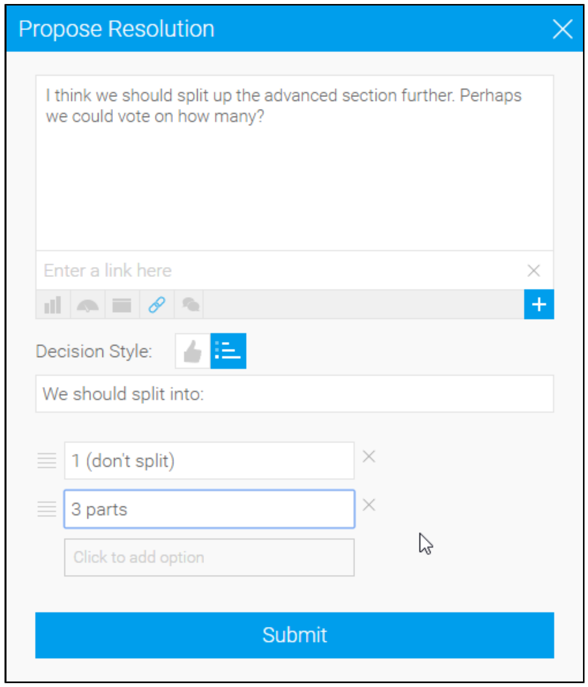
> *See Attachments for more information*



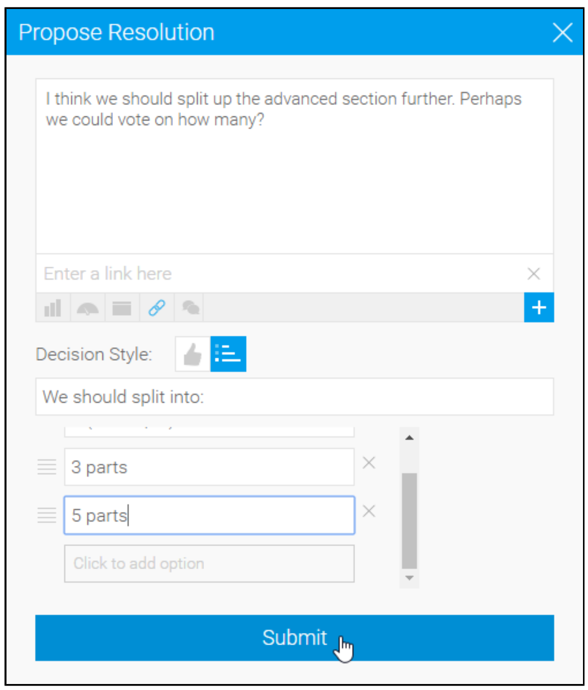
4. Select the **Decision Style** to be used:

- **Up/Down** - this is a thumbs up or thumbs down vote on a statement.
- **List** - this allows you to provide a question

or statement and a list of options users can vote on.



5. **Submit** your proposal.



Tasks

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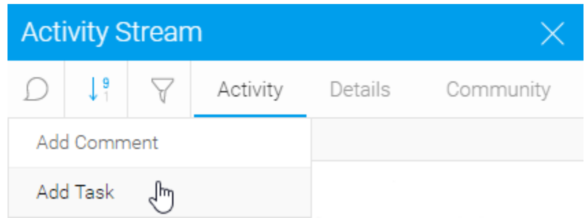
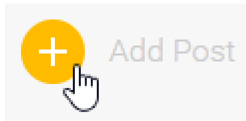
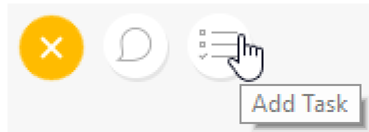
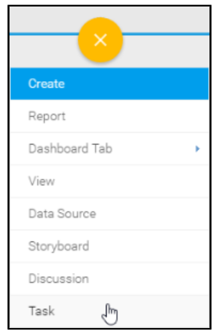
Tasks can be created and assigned to users for a variety of functions, covering simple 'to do' notes all the way through to data quality checks and content change requests. In order to create a task, follow these steps:

1. Click on the **Add Task** option.



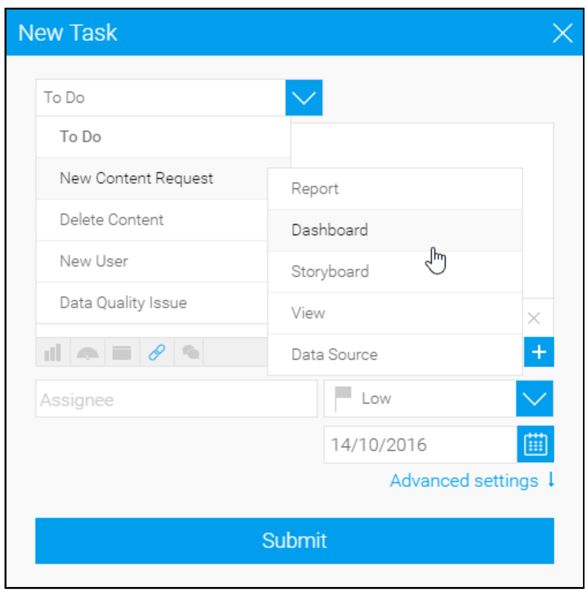






2. Select the type of Task from the following:

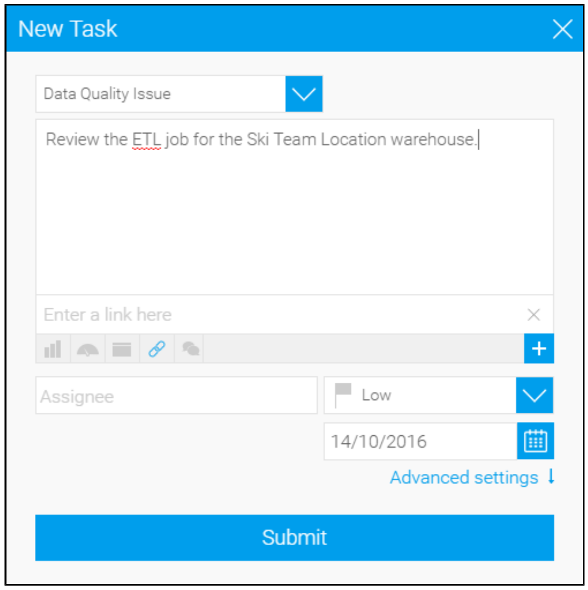
- To Do
- New Content Request
  - Report
  - Dashboard
  - Storyboard
  - View
  - Data Source
- Delete Content
- New User
- Data Quality Issue



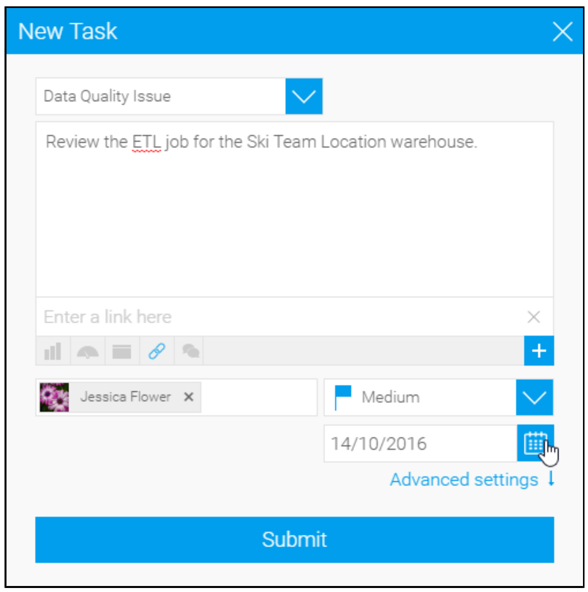
3. Enter the body text of your task request.

4. Add any attachments that may be required.

> *See Attachments for more information*



5. **Assign** the task. This involves:



- **Assignee** - which user should complete the task.
- **Priority** - how urgent the task is:
    - Low
    - Medium
    - High
- **Due Date** - when the deadline for completion of the task is.

6. Open the **Advanced Settings** if they are required.

From here you can adjust:

- **Security** - this allows you to adjust if it's a **P ublic** task(meaning that it will rely on the content or stream security it belongs to), or **Private** task (allowing you to secure to specific users and/or groups).

7. Click **Submit** to save your comment.

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