

Comments, Tasks, and Decisions

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Overview

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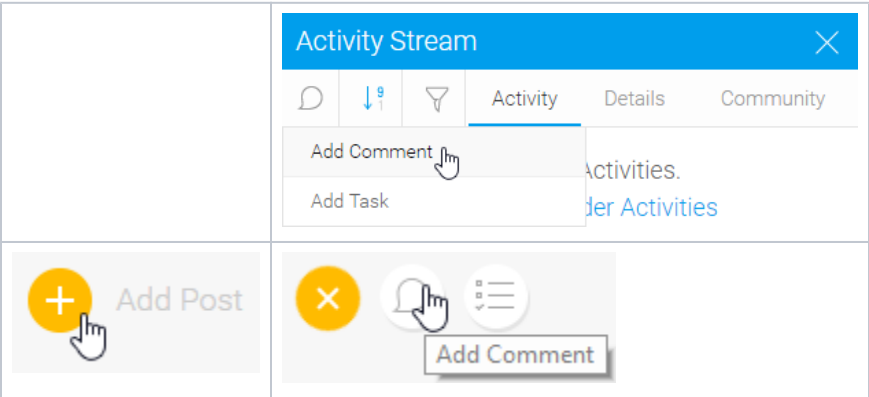
Yellowfin collaboration functions allow users to work together in a variety of ways, encouraging decision making and discussions related to content and business data. Comments, Decisions, and Tasks are available on content pages (Reports, Dashboard Tabs, and Storyboards), Discussion Streams, and Timelines.

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.

A screenshot of the 'What's the latest?' form. The form has a blue header with the title 'What's the latest?' and a close button. Below the header, there's a text area for entering the comment body. Below the text area, there's a link input field with the placeholder text 'Enter a link here'. Below the link input field, there are icons for adding attachments (image, document, link, etc.) and a plus button. At the bottom, there's a blue 'Submit' button. The text 'Advanced settings' with a downward arrow is also visible.

3. Add any attachments that may be required.

See [Attachments](#)
for more
information

What's the latest? [X]

Please review this item before we edit the final report.

Enter a link here [X]

[Icons: Bar chart, Cloud, Document, Link, Speech bubble]

Advanced settings [down arrow]

Submit

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

From here you can adjust:

- **Security** - this allows you to adjust if it's a **Public** 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:
 - [Refresh icon] Update
 - [Dice icon] Opportunity
 - [Warning triangle icon] Issue
- **Stream** - allows you to specify which stream the post it attached to.

What's the latest? [X]

Please review this item before we edit the final report.

Enter a link here [X]

[Icons: Bar chart, Cloud, Document, Link, Speech bubble]

Advanced settings [down arrow]

Submit

What's the latest? [X]

Please review this item before we edit the final report.

Enter a link here [X]

[Icons: Bar chart, Cloud, Document, Link, Speech bubble]

[Lock icon] Trainers [X]

Decision Required: [Toggle: ON] 14/10/2016 [Calendar icon]

[Refresh icon] Update [Down arrow]

Sales Chat [Down arrow]

Less [up arrow]

Submit

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

Propose Resolution

I think we should split up the advanced section further. Perhaps we could vote on how many?

Enter a link here

Decision Style:

We should split into:

1 (don't split)

3 parts

Click to add option

Submit

Propose Resolution

I think we should split up the advanced section further. Perhaps we could vote on how many?

Enter a link here

Decision Style:

We should split into:

3 parts

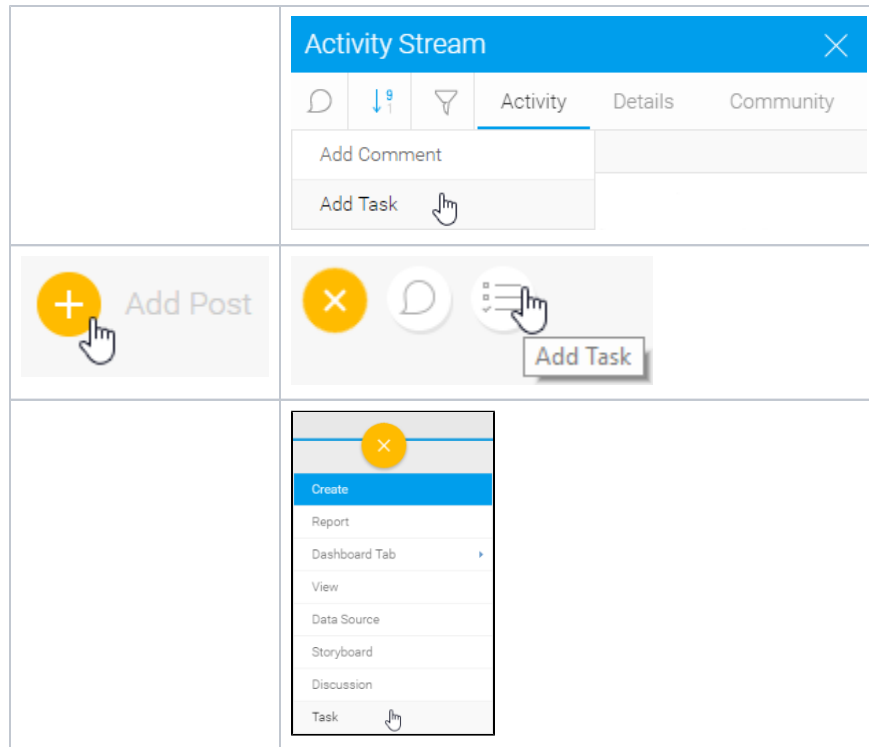
5 parts

Click to add option

Submit

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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 **Public** 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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