Content Folders

Overview

All content is managed through a security and categorisation infrastructure which is managed through the Content Folders. Content is stored within a two tier folder structure of Folders and Sub Folders.

The security of your reports is managed at the folder and sub folder level, not at the individual item level. The purpose of this is to simplify the creation of reports in the system.

- **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, dashboards, views, data transformation flows, presentations and stories.

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

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Creating a folder

This process shows how to create a parent folder, which can be used to store sub folders.

1. Navigate to Administration > Administration Console from the left side navigation
2. Expand the Content Folders tab and click the **Add** button

You will be taken to the Folder setup page, where you will need to define the following settings

Parameter	Description
Folder Name	This will be the name of the folder displayed in various parts of the system when saving and viewing content.
Description	This will be the description of the folder, used to define its intended purpose and audience.
Folder Hierarchy	This defines the level of the folder. Select 'Top Level' to create a new parent folder.
Sort Order	(Advanced setting) Provide a numeric sort order to list the folders accordingly. For example, a sort order of 1 means the folder will be displayed first. Defaults to zero in which case the folders are sorted alphabetically.

3. Click **Submit** to create the folder

Creating a sub folder

Create a sub folder by following the steps below. Note that at least one folder should already be created.

1. Once a folder has been created, click the **Add** button under the Content Folders list in the Admin Console to start defining Sub Folders
You will be taken to the same folder setup page

2. In the Folder Hierarchy field, select a parent folder where the sub folder will be created
   A range of different options will become available
3. To create a 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

Parameter	Description
Folder Name	Name of the sub folder displayed in various parts of the system when saving and viewing content.
Description	Description of the folder, used to define its intended purpose and audience.
Folder Hierarchy	This is used to select the parent folder within which this sub folder should exist.
Advanced settings	Expand this link to access additional advanced settings. These are discussed below.
Sort Order	Provide a numeric sort order to list the sub folders accordingly. For example, a sort order of 1 means the sub folder will be displayed first. Defaults to zero in which case the folders are sorted alphabetically.
Draft Content Default Folder	Enabling this toggle means that any content that is not activated is automatically stored in this Sub Folder, such as draft reports, dashboards, etc. Note that 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 organized.
Default View Folder	Enable this toggle to define this sub folder to be used to store Views that are automatically created. Note that there can be only one of these folders in a system.
Version History	The version history allows you to store the data returned in a report, in order to maintain historical result sets for reports. • **Current Version Only:** If version history is set to *Current Version Only* set then no historical results will be kept. This means that the system runs a database query, and creates a result set every time the report is run. This setting is selected by default for all new content folders. • **Keep Historical Versions:** If the *Keep Historical Versions* option is selected then all historical versions of the reports will be kept. With this option not only will the report definition saved but the data as well. This allows users to view previous versions of the report and compare result sets. Note: It's important to remember that this option can quickly build up quite a large amount of data, so use this option sparingly. 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. Refer to the following parameters for more information.
Max Size	Define the amount of storage available for caching report content in this folder (in KB). This lets you set a limit to the amount of report data that will be stored. If this limit is exceeded, the system will delete older cached content to store new one.

| Max Versions | Define the number of historical result sets that will be accessible, per report. For example, you can limit each report to store 20 result sets. If this number is exceeded, the system will delete older cached sets to store new one.

Note: Content folder limitations related to versions and age, do not apply if the content in question is used in a Story. |
|---|---|
| Max Age | Define how long the historical result sets should be stored before they are deleted. For example, if you define this age limit to be 5 years, then content will be stored for 5 years; all older content will be deleted.

Note: This limitation will not apply if the content in question is used in a Story. |

Configuring content approval and security access

This section allows you to configure an expert approval process for the content stored in this folder, as well as define which users can access the content.

1. Provide the details for the sub folder, then click the **User Access** tab

2. Enable the **Expert Approval Required to Publish** toggle to define an approval process for content created in this folder
This allows administrators and advanced users to approve content in the folder before it is activated for public consumption, ensuring it is correct and the data can be trusted

3. Select a user or group in the Person/Group panel as the expert approver

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

Security setting	Description
Unsecure	People can access the content stored here without logging in.
Public	Users will have to log in before being able to view the content, but all users of the system will be able to view it.
Private	Only selected users will be able to access this content.

5. If you choose Private, then you must select a person or group and then the level of access that they are permitted
6. Click on the access level of the selected user (or approver) to update their level of access. Three types of access exist:

Access Level	Description
Read	Users will only be able to read the content but not create new items of this type of content.
Edit	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

7. Select a user with delete access to finish
   You cannot finish the process if you do not have at least one person or group with delete access. You can have as many groups and people in the list as you wish.
8. Once done, click Submit to save changes
   A blue approved icon will appear on the sub folder to indicate expert approval is required to store content in this folder

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.
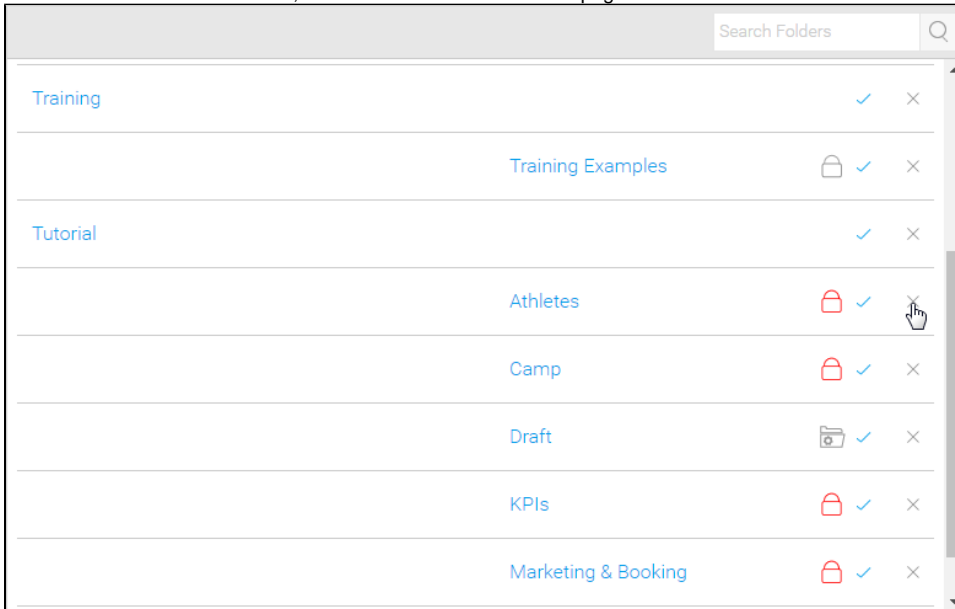
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Editing a folder or sub folder

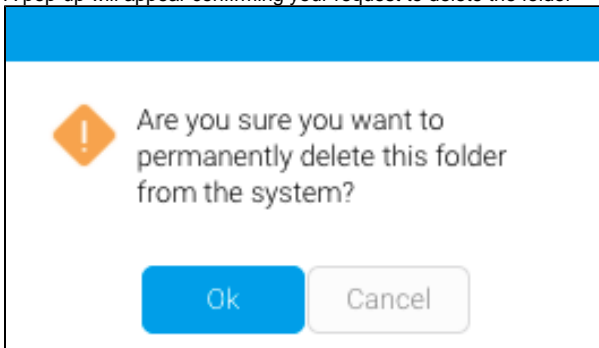1. To make changes to a Folder or Sub Folder, locate it on the Admin Console page and click on its name


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Deleting a folder or sub folder

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

A pop-up will appear confirming your request to delete the folder

2. Click **OK** to delete the folder
3. If the folder contains content, the following pop-up will appear
   You will need to delete or move the content before the folder can be deleted
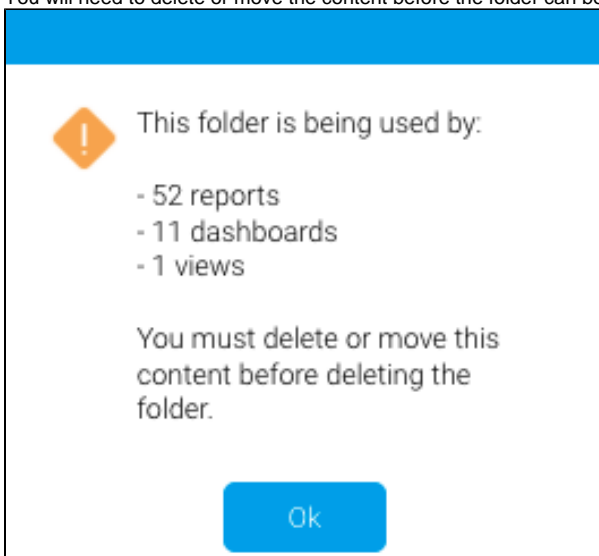
4. Click **OK** to return to the Admin Console page