

Attachments

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Overview






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Comments, Decisions, and Tasks can all have attachments added to them to enrich the collaboration between users. Attachments come in several forms, and the next sections will explore those and how to use them.

Content

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Yellowfin content can be attached in order to allow users to directly reference them. This means that anyone involved in the collaboration can quickly and easily access a relevant piece of content directly from the post or task.






The following steps can be applied to adding a Report, Dashboard Tab, Story, Storyboard, or Discussion Stream:

1. Click on the type of content you want to attach. You can select from the following:

-  Report
-  Dashboard Tab
-  Story
-  Storyboard
-  Discussion Stream

New Comment

I think we need to review the recent changes made to our sales process as we've seen a dip in our figures lately. Please view the Athlete Invoice Summary report to see details.

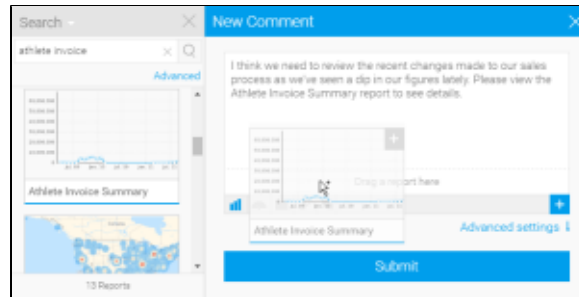


Report

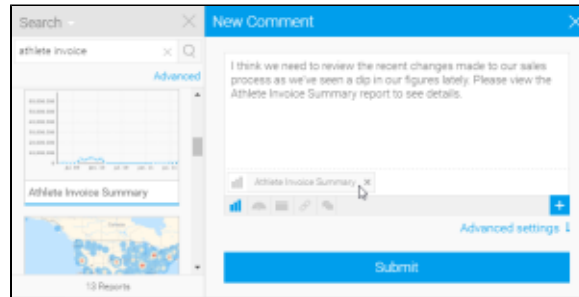
Advanced settings

Submit

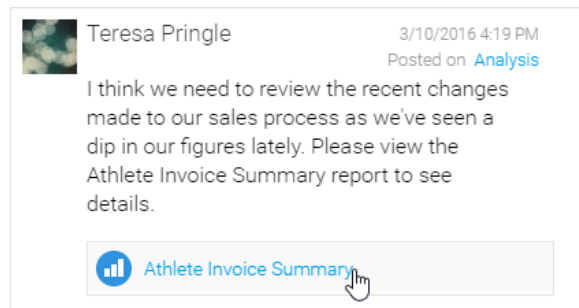
2. Locate the item you want to attach, and drag it into the attachment area.



3. You will now see your content listed. You can only attach one item per comment/task.



4. When your comment/task has been saved, you will see your content listed and linked.

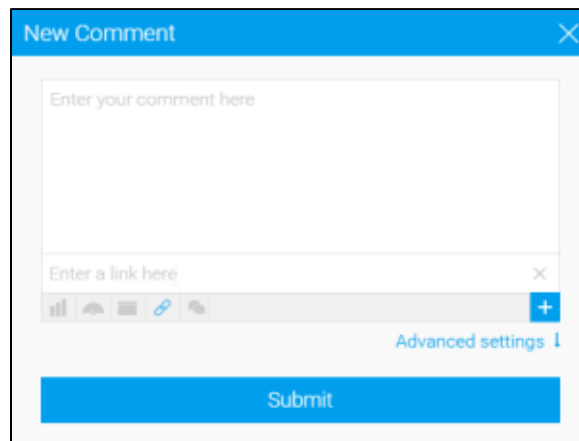


Link

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URLS can be added to a comment/task in order to provide a link to external pages or content. The following steps can be used to add a link:

1. By default, the link is already selected, but if you have picked some other options ensure that the link is selected.



2. Type or paste the URL you want to use into the link box and submit your comment/task.

New Comment

Check out this blog post - it has some great data vis!

<http://www.yellowfinbi.com/YFCommunityNews-Data-vi>

Advanced settings

Submit

3. Your link will now appear at the end of your text.

Teresa Pringle 3/10/2016 4:43 PM
Posted on [Analysis](#)

Check out this blog post - it has some great data vis!

[Data visualization: Have the world...](#)

Reply

File

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Files can be added to a comment/task in order to provide access to content from outside the system. The following steps can be used to add a file:

1. Click on the  icon.

New Comment

Please review this dashboard, referencing the attached guidelines document.

Enter a link here

Advanced settings

Submit

2. Select the  File option.

3. Either drag and drop your file onto the file area, or click to browse the file system to locate it.



4. Submit your comment/task.

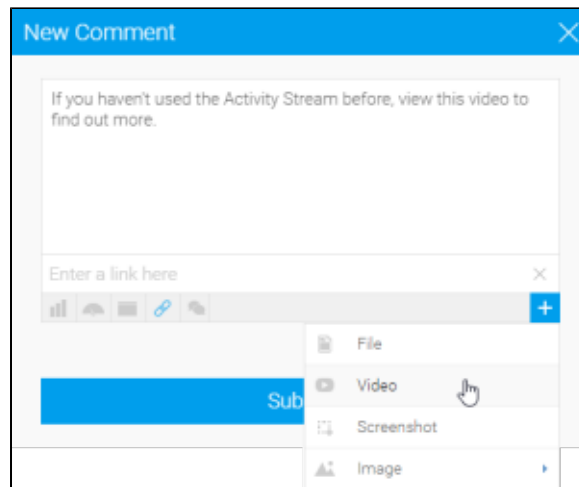
5. Your file will now appear at the end of your text.

Video

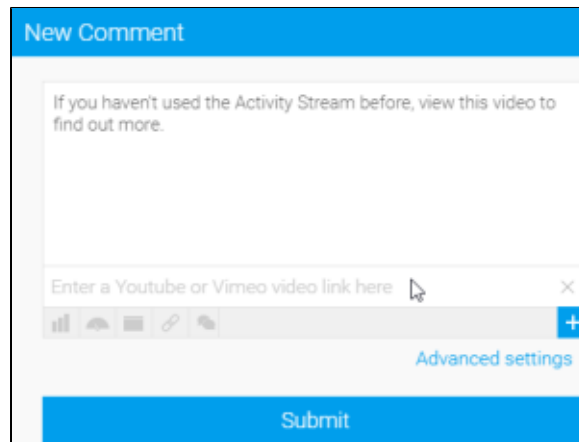
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Videos can be added to a comment/task in order to provide context to a discussion or request. The following steps can be used to add a video:

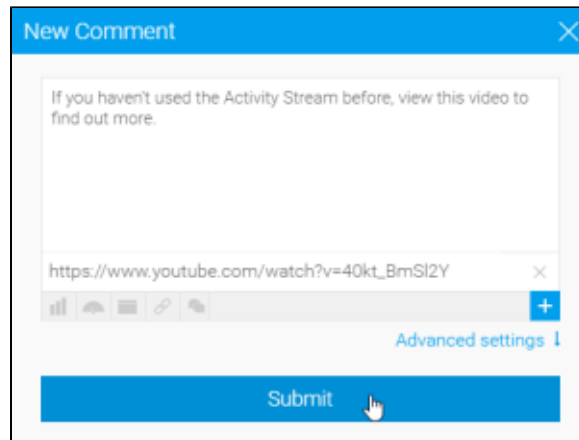
1. Click on the  icon and select the  Video option.



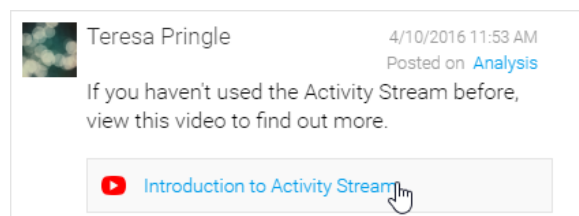
2. Type or paste the URL of your video into the video box.



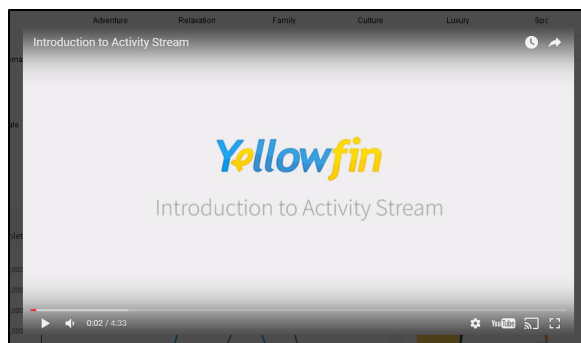
3. Submit your comment/task.



4. You will now see a link to the video at the bottom of your text.





5. When someone clicks on the video link it will be opened in a lightbox for them to view.

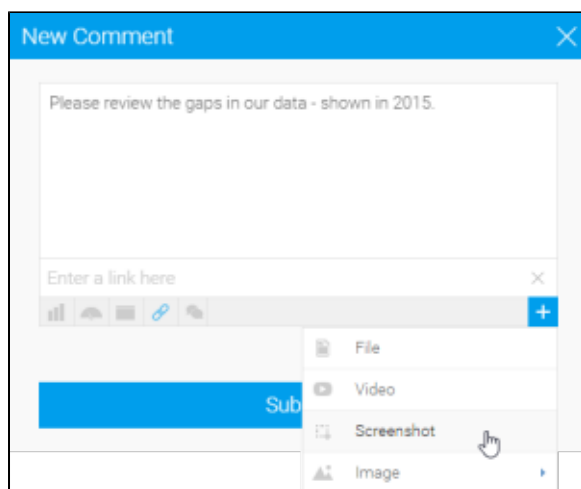


Screenshot

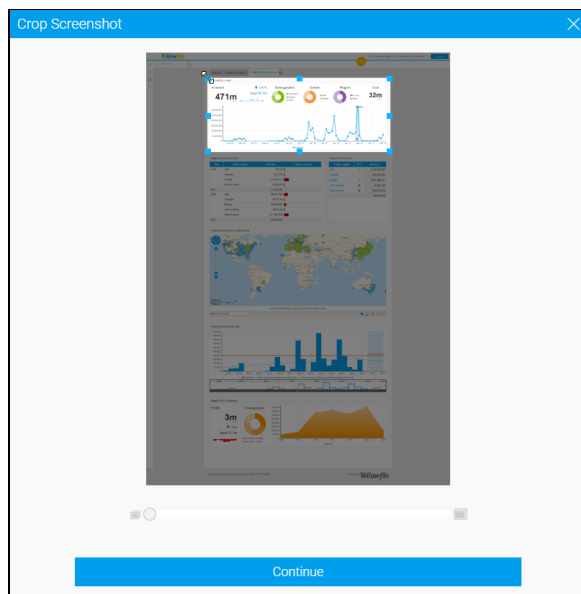
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Screenshots of Yellowfin content can be taken within, and added to a comment/task in order to provide context to a discussion or request. The following steps can be used to take and attach a screenshot:

1. Click on the  icon and select the  Screenshot option.



2. Yellowfin will now take a screenshot of the whole current page, minus any open menus such as the Activity Stream panel. From here you can crop your image down to the relevant section.



3. Now you can annotate your screenshot - the following options are available:



Drawing - draw on the screenshot like a whiteboard.



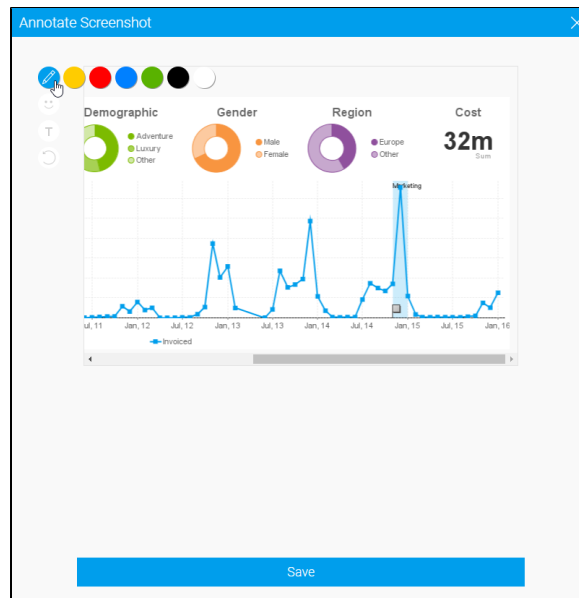
Icons - add preset icons to the screenshot.



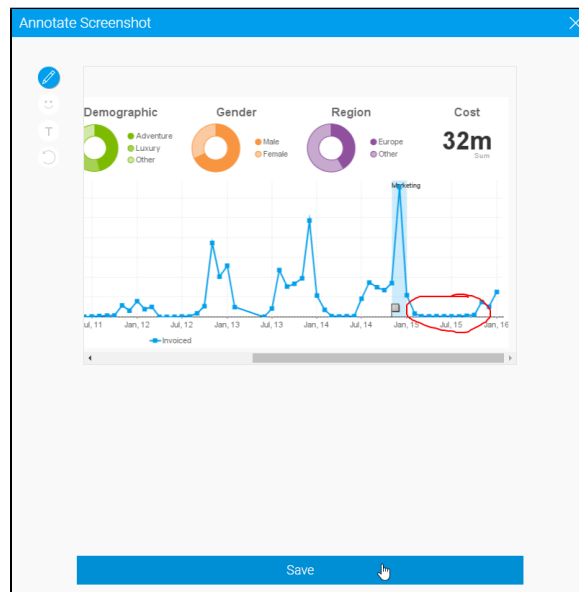
Text - include custom text on the screenshot.



Undo - clear all annotations made on the screenshot.

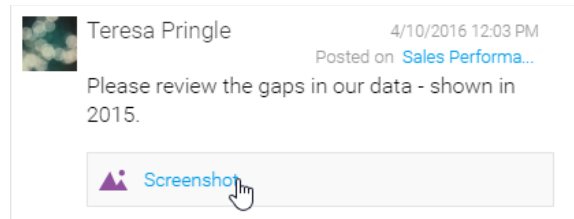


4. Save your screenshot.

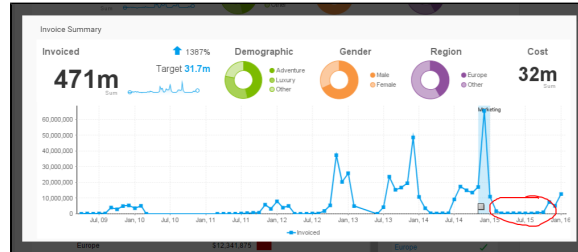


5. You will now see that the screenshot has been included in your comment /task.

6. A link to your screenshot will now appear at the end of your text.




7. When someone clicks on the screenshot link it will be opened in a lightbox for them to view.



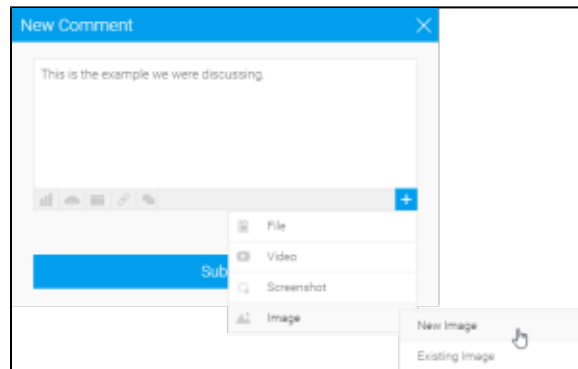
Image

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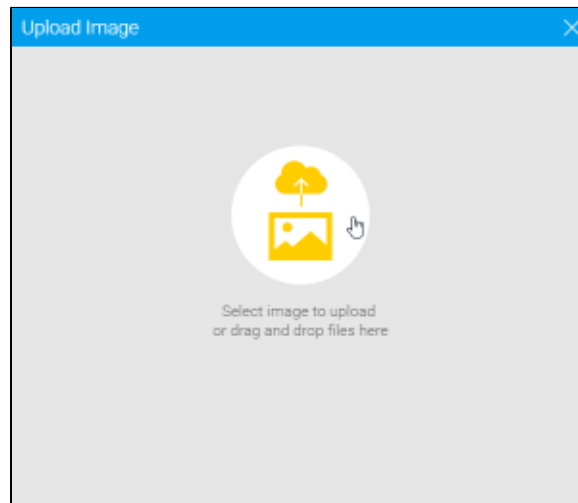
Images can be added to a comment/task in order to provide visual aids. The following steps can be used to add an image:

1. Click on the  icon and then select the  Image icon, choosing one of:

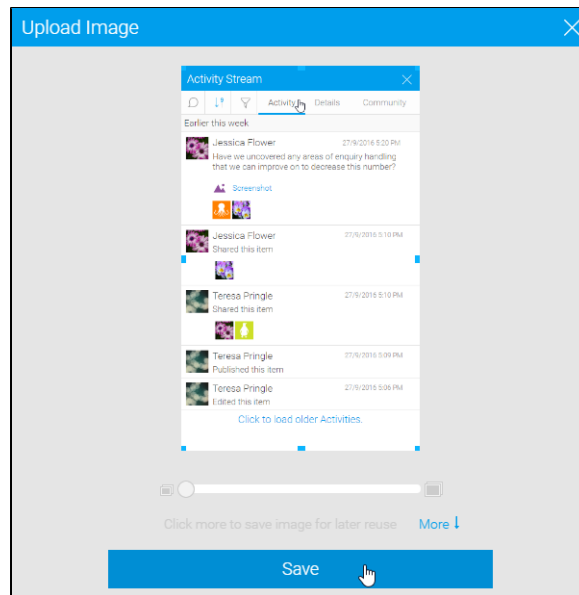
- a. New Image (see step 2)
- b. Existing Image (see step 4)



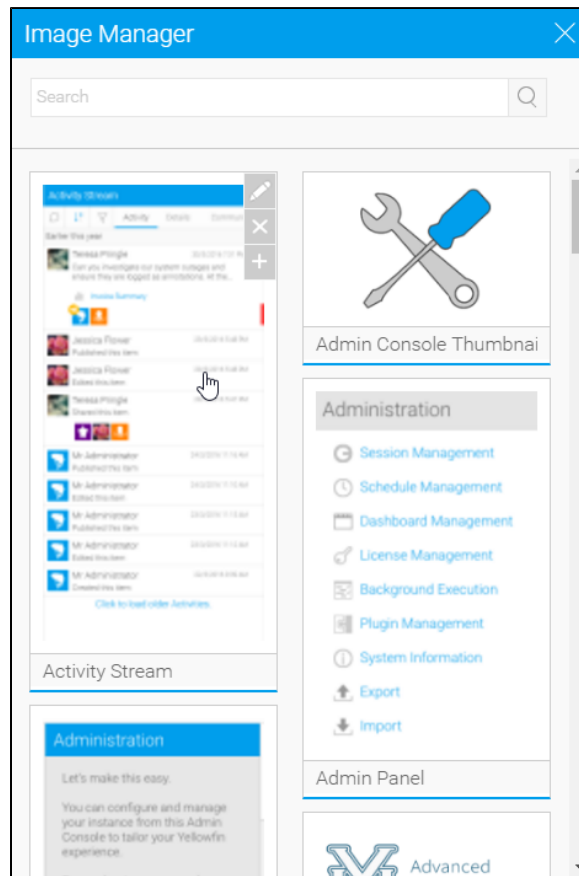
2. If you have selected New Image, drag and drop your image file or click to browse the file system and locate it.



3. Crop the image if required, and Save. Proceed to step 5.



4. If you have selected Existing Image, browse and locate the image you wish to attach. Proceed to step 5.



5. You will now see that your image has been attached to your comment /task. Submit your post.

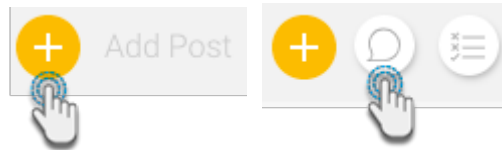
6. A link to your image will appear below the end of your text.

Polls

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You can create a poll to get feedback or when a decision is required. This must be part of the first post in a thread. Responders will then have the opportunity to vote on it. In order to create a poll, follow these steps:

1. Click on the **add post** button, and choose the add comment or task option.



2. Enter the body text of your comment /task.

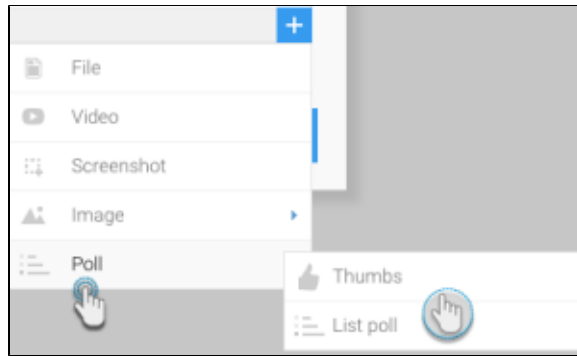
3. Click on the **attachment** icon and select **Poll**.



4. Then select a poll style to choose.

- **Thumbs:** use this for a thumbs up or thumbs down vote on a statement.

- **List poll:** this allows you to provide a question or statement and a list of options users can vote on.



5. Enter the poll question.

A screenshot of a mobile application's 'Post a message to this topic' form. The form has a blue header with a close button (X). Below the header is a text input field containing the text 'Work commute poll'. Below the text field is a 'Poll Question' label with a close button (X). Underneath the label are two input fields for 'Option 1' and 'Option 2', each with a close button (X). A plus icon is located below the options. At the bottom of the form is a blue 'Submit' button. A toolbar at the bottom of the form contains icons for a bar chart, a sun, a document, a link, and a speech bubble, followed by a blue plus icon and the text 'Advanced settings ↓'.

6. If you selected a *list poll*, provide the options (at least 2). To add more, click on the add button.

A screenshot of a mobile application's 'How do you commute to work?' poll form. The form has a blue header with a close button (X). Below the header is a text input field containing the text 'How do you commute to work?'. Below the text field are two input fields for 'Car' and 'Bike', each with a close button (X). A plus icon is located below the options. A hand cursor icon is pointing at the plus icon.

7. Once done, click on the **Submit** button. The poll will be created.

Note: once voting commences, a poll comment cannot be edited.

Post a message to this topic. ✕







Work commute poll

How do you commute to work? ✕

Car ✕

Bike ✕

Walk ✕




+


Advanced settings ↓

Submit

Voting on a poll

To answer the poll, a user must click on the **reply** button of the comment, make their selection, and click **Vote**.

✕  System Administrator
Posted on

Work commute poll 

How do you commute to work?

☐ Car

☐ Bike

☒ Walk

☐ Public Transport

Vote

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