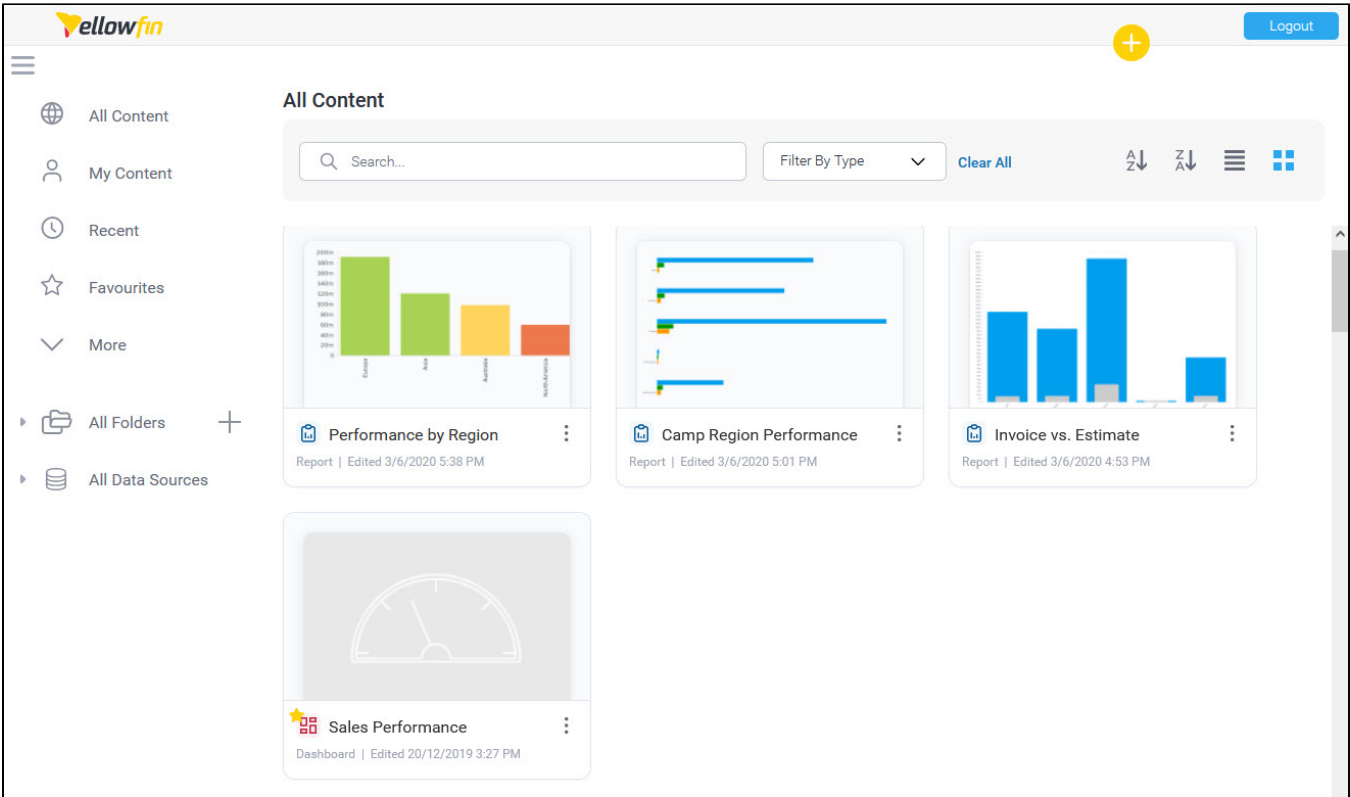


Browse Page

- Overview
- Display
 - Thumbnails
 - List
 - Columns
 - Available Columns
- Actions
 - Mouse Actions
 - Menu
 - Open in new tab
 - Edit Details
 - Deleting Content
- Search
 - Filter By Type
- Filtering Options
- Folders/Data Source
 - Browsing by Folder
 - Browsing by Data Sources
 - New Folders
 - Edit Folders
- Content Approval

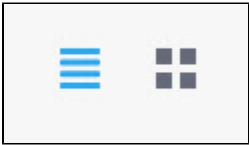
Overview

The browse page allows you to explore all the available content in the system. You can locate individual views, reports, dashboards, stories, and more depending on your security access level.

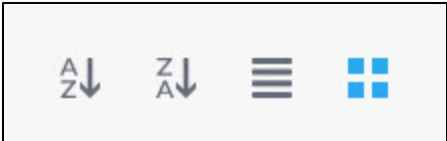


Display

There are two display layouts available: a List and a Thumbnail View.

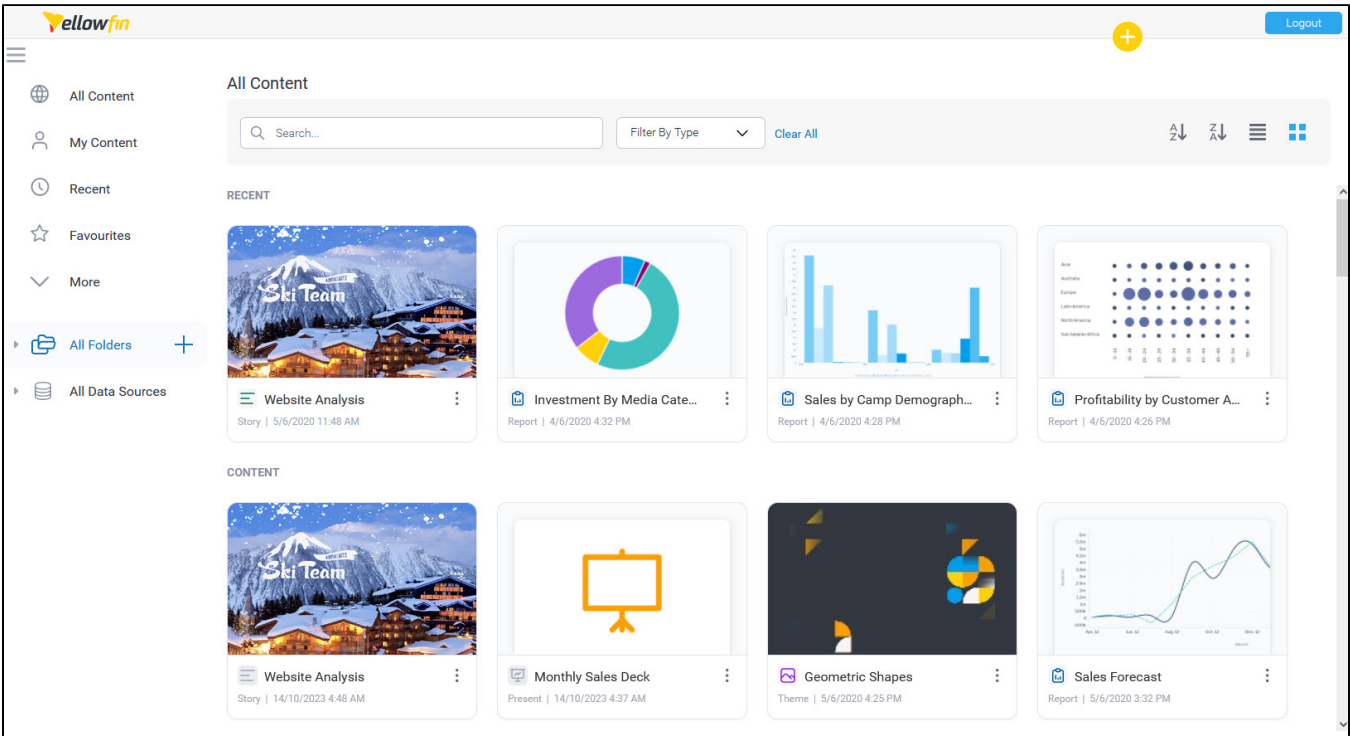


In the thumbnail layout, users can sort the content in ascending or descending order.

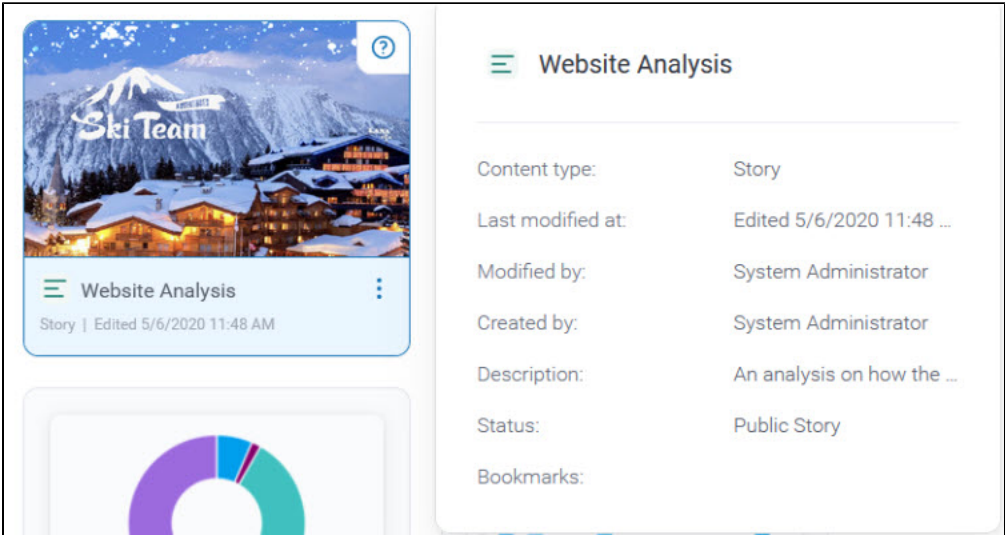


Thumbnails

Each content item will be represented by a thumbnail. The thumbnail will display an image relevant to the content type, or a default image if the content has not been initialized.



To see more information about an item, you can hover over a thumbnail and click on the  icon on the top right corner.



List

This layout allows users to search for their content using a list. Information about each content item is displayed in columns. Users can also perform bulk actions when in list view.

yellowfin

Logout

All Content

My Content

Recent

Favourites

More

All Folders

All Data Sources

All Content

Search...

Filter By Type

Clear All

Name	Description	Last Modified By	Linked
nosfg		System Administrator	
Untitled Story		System Administrator	
Series Selection	Explore a single metric at a time, across multiple reports, each u...	System Administrator	
Geometric Shapes		System Administrator	
Sales Forecast		System Administrator	
Campaign Analysis	An analysis of our marketing campaigns	System Administrator	
Welcome to Yellowfin	Yellowfin Introductory Presentation.	System Administrator	
Monthly Sales Deck		System Administrator	
Website Analysis	An analysis on how the new website has impacted sales.	System Administrator	
Colour Presentation Theme		System Administrator	
Administration Tour	Learn about the different areas and functions available in the Ad...	System Administrator	
Yearly Invoiced	Yearly Invoiced KPI	System Administrator	
Investment By Media Category	Ski Team, 7/4/2020 2:54 AM	System Administrator	

Columns

The List view allows each user to select what information they want to have displayed on the page through the Columns popup. As each user interacts and acts on content differently, organizing Columns lets you be more efficient.

To customize your view, click the 'Edit Columns' icon  on the top right side of the page and select your preferences.

You have several options within the Columns popup:

- 1. Filter columns by typing in the search box.
- 2. Toggle columns on or off using the checkbox next to each column name.
- 3. Rearrange columns by dragging them.

Logout

All Content

My Content

Recent

Favourites

More

All Folders

All Data Sources

All Content

Search...

Filter By Type

Clear All

Name	Status	Run Type	Description
Investment By Media Category	Public Report	Drag and Dr...	Ski Team, 7/4/2020 2:54 AM
Ski Team	Public View		This is a tutorial view for training and demc
Ski Team (Clone)	Draft View		This is a tutorial view for training and demc
Analysis	Public Dashboard		This is an analytic tab that is used to under
Campaign Summary	Public Report	Drag and Dr...	This report provides a high level summary
Camp Country Performance Flags	Public Report	Drag and Dr...	This report uses the flag formatter to displ
Profit Trends & Forecast	Public Report	Drag and Dr...	This shows profit over time...
Drill	Public Dashboard		This tab is used to demonstrate different d
Agency Benchmark	Public Report	Drag and Dr...	Top N Agencies compared to all other Ager
Athlete Cost Summary	Public Report	Drag and Dr...	View athlete cost summaries by gender, de
Athlete Spending	Public Report	Drag and Dr...	View athlete invoicing figures by year and c
Athlete Invoice Summary	Public Report	Drag and Dr...	View athlete invoicing summaries by gende
Invoice Summary	Public Report	Drag and Dr...	View athlete invoicing summaries by gende
Athlete Profit Summary	Public Report	Drag and Dr...	View athlete profit summaries by gender d

You can also:

1. Resize columns to accommodate different information.
2. Sort the table by clicking on column headings to toggle between ascending (ASC) and descending (DESC) order.
3. Scroll horizontally to view all available data.

Logout

All Content

My Content

Recent

Favourites

More

All Folders

Tutorial (5)

Athletes

Camp

KPIs

Marketing &...

Training

All Data Sources

All Content

Filter By Type

Clear All

Name	Description	Last Modified	S
Administration Tour	Learn about the different areas and functions available in t...	4/6/2020 5:00 PM	P
Agency Benchmark	Top N Agencies compared to all other Agencies by demog...	3/6/2020 5:26 PM	P
Agency Sales by Profitability	An analysis of the agency sales and their ranked profitability	28/2/2020 3:38 ...	P
Analysis	This is an analytic tab that is used to understand examine ...	3/6/2020 5:51 PM	P
Athlete	An athlete KPI report used to highlight KPI dashboard tab f...	23/1/2020 1:16 ...	P
Athlete Cost Summary	View athlete cost summaries by gender, demographic, and...	26/6/2017 1:15 ...	P
Athlete Demographic Breakdown		3/6/2020 5:53 PM	P
Athlete Demographic Spread	A bubble scatter that displays the spread of athletes by ag...	3/6/2020 4:17 PM	P
Athlete GIS Google Map		26/6/2017 1:15 ...	P
Athlete GIS Map	View invoicing and camp rating figures by athlete location ...	26/6/2017 1:15 ...	P
Athlete Invoice Summary	View athlete invoicing summaries by gender, demographic,...	26/6/2017 1:15 ...	P
Athlete Invoiced GIS Heat Map		26/6/2017 1:15 ...	P
Athlete Location	Athlete Location points on a GIS map for layering.	4/6/2020 4:05 PM	P
Athlete Profit Summary	View athlete profit summaries by gender, demographic, an	26/6/2017 1:15	P

Available Columns

Title	Description
Name	Name of content.
Description	A summary of what the content is about.
Last Modified	Last time it was modified.
Status	Displays whether it's a Public or Draft content item.
Last Modified By	Name of the user who last modified this item.
Linked	Displays a Link icon next to each report that has related content or drill through reports linked to them. Only parent reports show links.
Run Time	Provides an indication of how long the content item takes to run.
Folder	Name of the Folder where this item is stored.
Sub Folder	Name of the Sub Folder where this item is stored.
Broadcasts	Indicates if this content item is included in any Broadcast schedules.
Run Type	Indicates if a View was created using the Drag and Drop Builder or an SQL statement.
Tags	Lists any content tags that have been associated with this item.

Actions

[top](#)

Once you have located the content you require, you can perform various actions—either on a single item or multiple items.

Mouse Actions

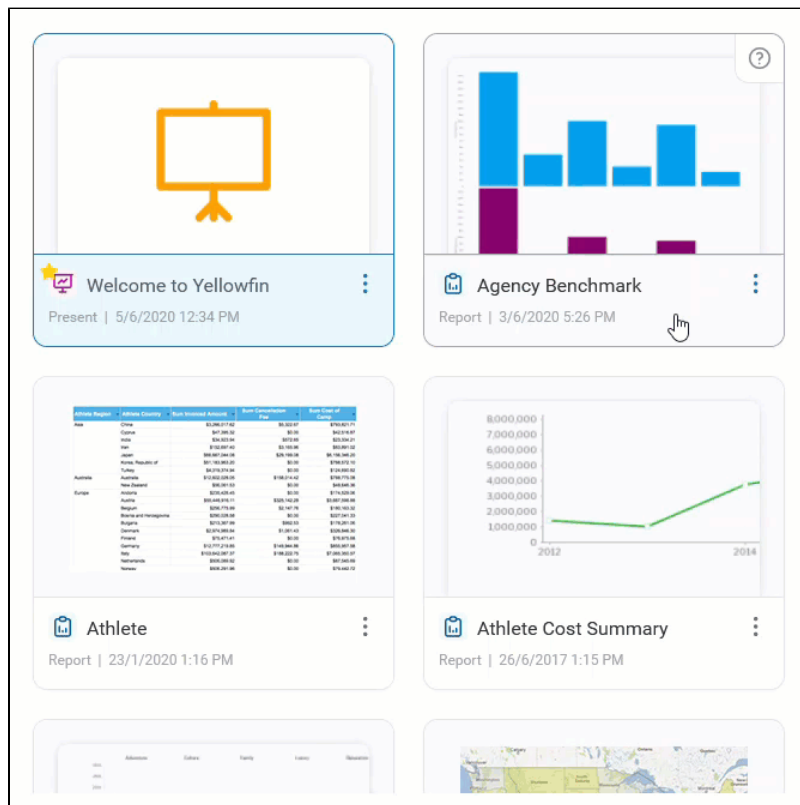
There are three different mouse actions that can be performed on the browse page in order to interact with content.

Click	Description
Single Click	This will allow you to select an item. If you hold down shift or control/command on your keyboard you will be able to select multiple items.
Double Click	This will allow you to open a single piece of content from the browse page. Simply double click on the item you wish to open.
Right Click	This will allow you to open a menu for the selected content item or items. Simply right click on the item you wish to see the menu for. As an alternative you can select the item and open the menu by clicking on the three dot icon 

Menu

There are different menus, depending on the content item selected. Users may see different menu options on a content item based on the security functions they have for that particular content type and whether it's a "Published" or "Draft" item.

To access the menu for Thumbnail content, right-click anywhere in the tile or click on the three dot icon  on the bottom right side of a thumbnail tile.



To access the menu when in list view, right-click on the content item row.

Name		Status ↓
	Drill	Public Dashboard
	GIS Maps	Public Dashboard
 	Sales Performance	Public Dashboard
	Series Selection	Public Dashboard
 	Administration Tour	Public Presentation
 	Monthly Sales Deck	Public Presentation
 	Welcome to Yellowfin	Public Presentation
	Agency Benchmark	Public Report
	Agency Sales by Profitability	Public Report
	Athlete	Public Report
	Athlete Cost Summary	Public Report
	Athlete Demographic Breakdown	Public Report

Published Content Menus

Dashboards - Presentations - Reports	Stories	Themes	Views
Open Open in New Tab Edit in Page Edit in New Tab Share Add to Favourites Edit Details Make a Copy Delete	Open Open in New Tab Edit Edit in New Tab Share Add to Favourites Make a Copy Delete	Open Open in New Tab Edit Edit in New Tab Add to Favourites Edit Details Make a Copy Delete	View Summary Edit Edit in New Tab Add to Favourites Edit Details Make a Copy Create Report Delete Check the following links to learn more about Model, Field Properties, Security Settings, and Automation Settings.

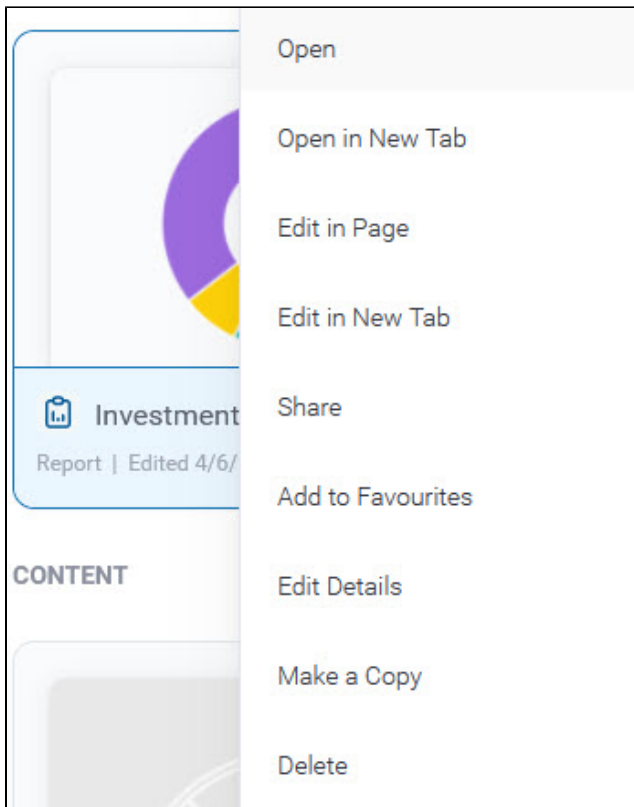
Drafts Content Menus

Dashboards - Presentations - Reports	Stories	Views	
Open Open in New Tab Edit Details Make a Copy Delete	Open Open in New Tab Make a Copy Delete	View Summary Edit > Edit in New Tab Edit Details Make a Copy Delete Model Field Properties Security Settings Performance Settings Automation Settings	
Check the following links to learn more about: Model , Field Properties , Security Settings , Performance Settings , and Automation Settings .			

Action	Description
Open	Allows you to open an individual content item. Alternatively, you can double click on the item to open it.
Open in new tab	Allows you to open the content in a new tab. Note that you must have the multi tab support enabled for this.
Edit in Page	This will allow you to edit an individual content item in the current page.
Edit in New Tab	This will allow you to edit the content in a new tab. Note that you must have the multi tab support enabled for this.
Share	This will allow you to share an individual piece of content from the browse page. See Sharing Reports for more information.
Add to Favourites	This will allow you to add individual or multiple items to your favourites list. If this includes Dashboards, they will be added from your personal dashboards list.
Edit Details	This will allow you to edit the details of a content item.
Make a copy	This will allow you to make a copy of a content item.
Delete	This will allow you to delete one or more content items.

Open in new tab

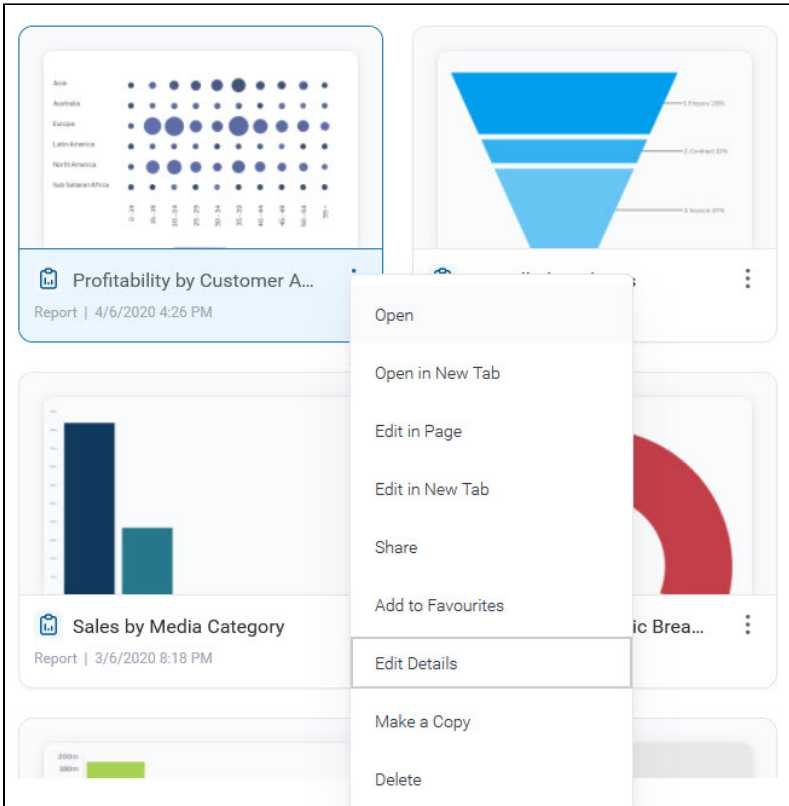
If you have the [Multi-Tab Support configuration](#) enabled, click on the menu of any content in the Browse page, and you will have additional options to *open* or *edit* that content in a new tab. You can also bring up the menu by right-clicking on the content thumbnail.



Edit Details

The Edit Details option allows you to change general information about a content.

To Edit Details from a Thumbnail view, right-click anywhere in the tile or click on the three dot icon  on the bottom right side of a thumbnail tile.



To Edit Details from a list view, right-click on the content item row.

Name		Description
	Campaign Analysis	An analysis of our marketing campaigns
	Ski Team (Clo	s is a tutorial view for training and demo purposes.
	Website Analy	analysis on how the new website has impacted sales.
	Monthly Sales	
	Sales Perform	
	Series Selecti	lore a single metric at a time, across multiple reports, e...
	Geometric Sh	
	Sales Forecas	
	Welcome to Y	owfin Introductory Presentation.
	Monthly Sales	
	Website Analy	analysis on how the new website has impacted sales.
	Colour Preser	

In the popup dialog, users can edit the Title, Description, Folder and Subfolder of a content.

Details

Title

Investment By Media Category

Description

Ski Team, 7/4/2020 2:54 AM

Folder

Tutorial

Subfolder

Athletes

Save

Cancel

Users can also reset the thumbnail image and set it to a default picture.

Details

Title

Investment By Media Category

Description

Ski Team, 7/4/2020 2:54 AM

Folder

Tutorial

Subfolder

Athletes

Save

Cancel

Deleting Content

When you delete content from the system, a number of different warning messages can be displayed, these are described below.

1. If the content item or items being deleted does not have dependencies, the user will simply be asked to confirm the delete.

Delete Content



Click **Delete** to continue.

Delete

Cancel

2. If the content item is a View, and that View has been used by other content (most commonly a Report), those Reports will be automatically deleted when the View is deleted. The user is shown the following warning including a list of the impacted Reports.

Delete Content



Delete Confirmation - Report as View report is used by other objects. Are you sure you want to delete Delete Confirmation - Report as View?

If deleted, the following items will also be deleted:



Delete Confirmation - Report using Report as View and an advanced subquery

Delete

Cancel

Further, if those Reports are themselves used by other content, a variation of the above warning will be displayed.

Delete Content



Delete Confirmation - VPN Ski Team View view is used by other objects. Are you sure you want to delete Delete Confirmation - VPN Ski Team View?

If deleted, the following items will also be deleted:



Delete Confirmation - Report



Delete Confirmation - Report as View

If deleted, content will be removed from the following items:

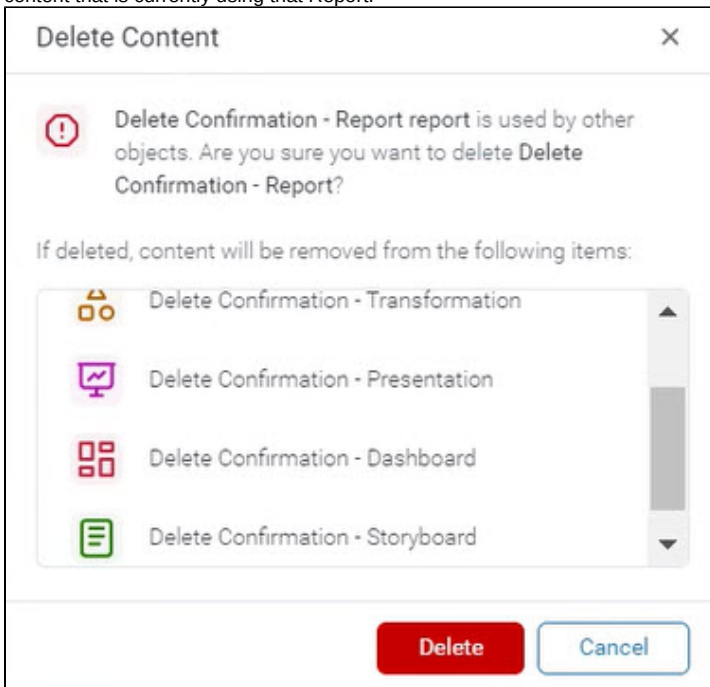


Delete Confirmation - Report using Report as View and an advanced subquery

Delete

Cancel

3. When a user attempts to delete a Report that is used by other content (such as included on a Dashboard or in a Story), the warning will list the content that is currently using that Report.

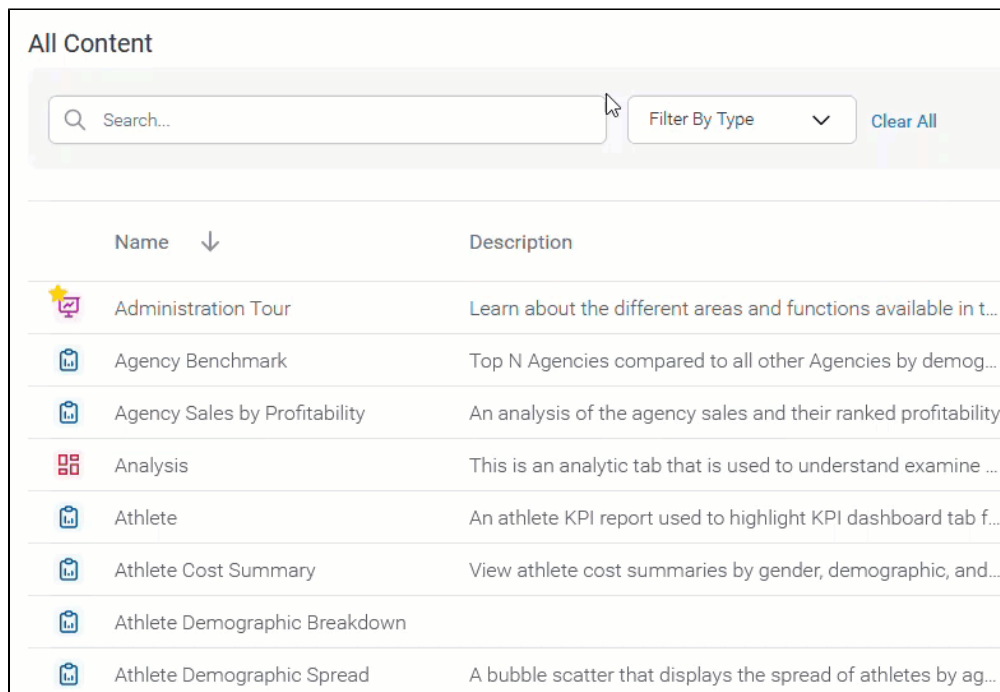


Search

[top](#)

When searching for content on the browse page, the search can be refined by entering text in the Search box and pressing enter or clicking the

magnifying glass to start the search. To clear the text in the Search box, simply click the  icon on the right side of the bar or click on Clear All.



Filter By Type

The drop down menu allows you to restrict the types of content on the page.

There are different options to filter your view:

- To select all or no content types, toggle all categories on or off.
- To select one or more content items, toggle all categories to off, then select the content types you need.
- The view will update automatically 3 seconds after you make your selection, or when you close the drop down by clicking on the arrow or clicking anywhere outside the drop-down.
- Clear all will default back to All Categories, clear the search bar and refresh the view, including resetting any sorting applied.

All Content

Q Search...

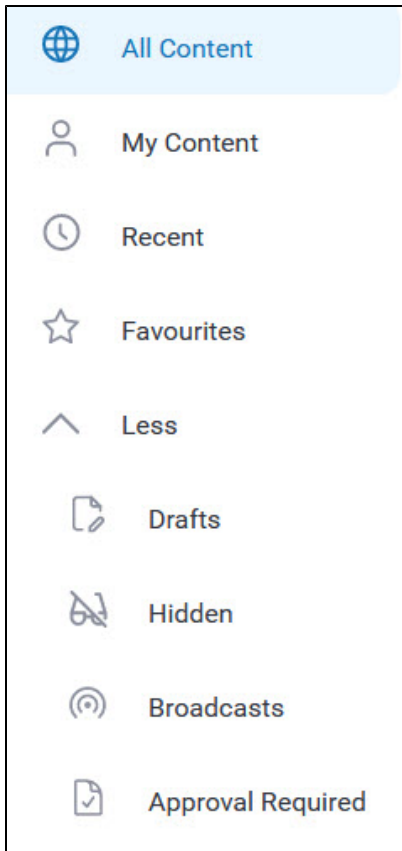
Filter By Type

Clear All

Name	Description
 Administration Tour	Learn about the different areas and functions available in t...
 Agency Benchmark	Top N Agencies compared to all other Agencies by demog...
 Agency Sales by Profitability	An analysis of the agency sales and their ranked profitability
 Analysis	This is an analytic tab that is used to understand examine ...
 Athlete	An athlete KPI report used to highlight KPI dashboard tab f...
 Athlete Cost Summary	View athlete cost summaries by gender, demographic, and...
 Athlete Demographic Breakdown	
 Athlete Demographic Spread	A bubble scatter that displays the spread of athletes by ag...
 Athlete GIS Google Map	
 Athlete GIS Map	View invoicing and camp rating figures by athlete location ...
 Athlete Invoice Summary	View athlete invoicing summaries by gender, demographic,...

Filtering Options

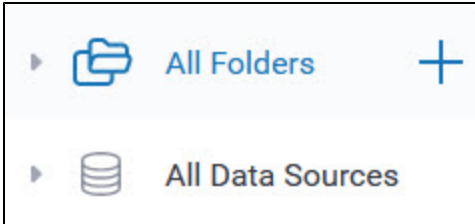
The Filtering Options on the left side, allows you to define the content view on the browse page, restricting the items you can view. The different options work in combination with the Search bar and Content Type Filter.



Sort Icon	Sort Type	Description
	All Content	Allows all content that is available to you to be displayed, only restricted by your search and content type.
	My Content	Allows users to filter the view to content they created or last modified.
	Recent	Arranges the content based on the latest date it was viewed.
	Favourites	Arrange the content by displaying only items you have selected as your favourites.
	Drafts	Allows you to restrict the content that is displayed to only draft items, hiding all active content.
	Hidden	Allows you to restrict the content that is displayed to only items that have nominated as hidden from the browse page. Note: Requires a specific role permission in order to see and use this function.
	Broadcasts	Allows you to restrict the content that is displayed to only reports you have set up with a personal broadcast, hiding all other content.
	Approval Required	Shows you only content that requires approval.

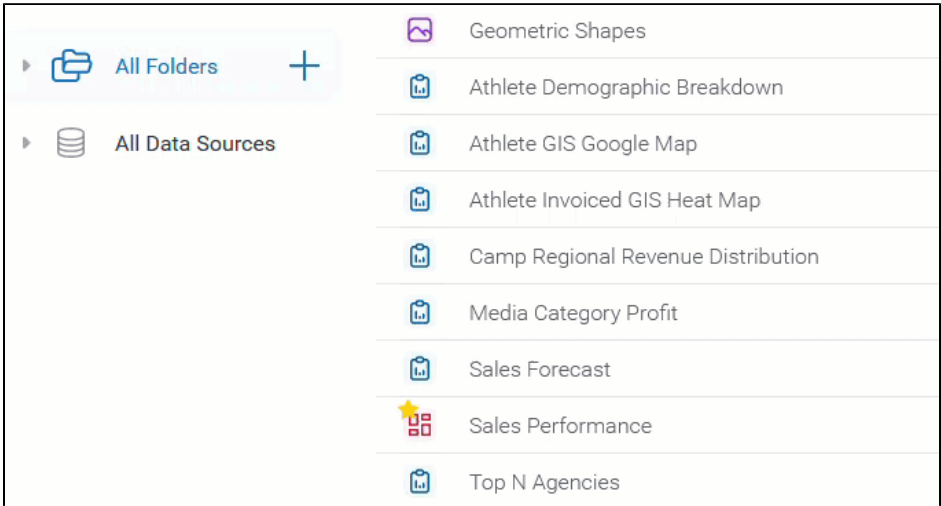
Folders/Data Source

Users have the option to view either the 'Folders' or 'Data Sources' sections.



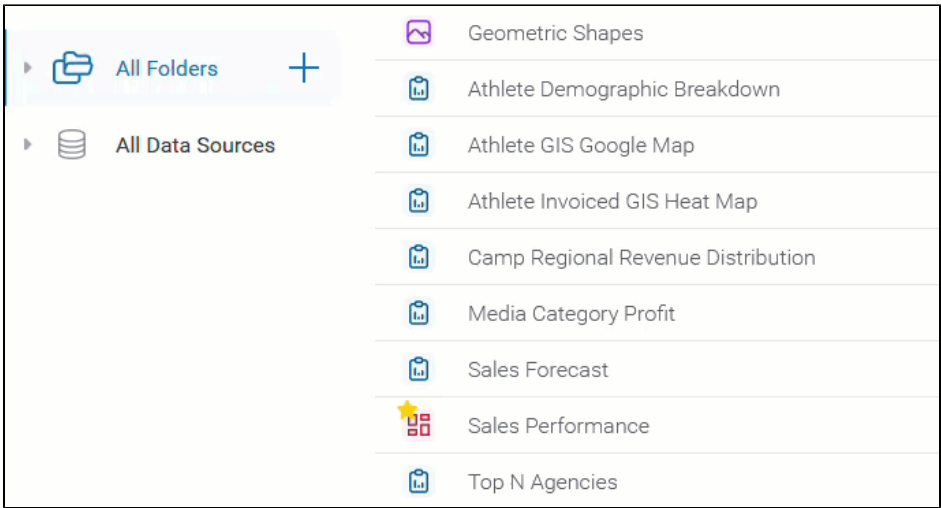
Browsing by Folder

To filter the current view, users can expand the folder hierarchy and select a folder or sub-folder.



Browsing by Data Sources

To filter the current view, users can expand the Data Sources hierarchy and select a view.



New Folders

This feature is available for users with the permission to create or edit folders.

You can add new folders From the "All Folders" section on the left side.

- Click on the  icon.
- Define the Folder Hierarchy, select Top Level (Folder).

Note that Folders are used as a container for Sub folders, and will never directly hold content. Leave the **Folder Hierarchy** option set to **Top Level** (which it is the default).

New Folder

Folder name

Folder name

Description

Provide a description to help identify the purpose of this folder and the content within it. (Optional)

Folder Hierarchy

This folder will be used to contain sub folders which will, in turn, contain content.

Top Level

Sort Order

Define a specific sort order value if you don't wish the folder to be sorted alphabetically. 0 will result in standard sorting.

Save

Cancel

Sub Folder: This is used as a container for content, and as such can have security and other content-related settings applied. Select a **Parent Folder** to place the **Sub folder**.

New Subfolder

Description

Settings

Approvals

User Access

Folder name

Folder name

Description

Provide a description to help identify the purpose of this folder and the content within it. (Optional)

Folder Hierarchy

This sub folder will be stored within the selected folder, and will contain content.

Tutorial

Sort Order

Define a specific sort order value if you don't wish the folder to be sorted alphabetically. 0 will result in standard sorting.

Save

Cancel

Complete the **Sub folder** window with the required fields.

Description Tab

Folder name - Enter a Folder name.

Description - Enter a description to identify the purpose of the folder.

Folder Hierarchy - Select either Top Level folder (to leave this as a parent folder) or choose a top level folder to be the parent folder (to make the new folder a sub-folder).

Sort Order - Define a specific sort order value if you don't wish the folder to be sorted alphabetically. 0 will result in standard sorting.

New Subfolder

Description

Settings

Approvals

User Access

Folder name

Folder name

Description

Provide a description to help identify the purpose of this folder and the content within it. (Optional)

Folder Hierarchy

This sub folder will be stored within the selected folder, and will contain content.

Tutorial

Sort Order

Define a specific sort order value if you don't wish the folder to be sorted alphabetically. 0 will result in standard sorting.

Save

Cancel

Settings

Draft Content Default Folder - Define if this folder will be used as the default folder for storing draft content until it is activated. There can only be one default folder to save draft content in the system. Turning this on will deactivate that setting for any other folder.

Default View Folder - Define if this folder will be used to store views that are automatically created. There can only be one folder to save draft views in a system.

Version History - Choose whether to save historical result sets for the contents of this folder (in which case the following settings can also be defined), or save only the current version.

Max Size - Define the amount of storage available for caching content in this folder (in KB).

Max Versions - Define the number of historical result sets that will be accessible, per report.

Max Age - Define how long the historical result sets should be stored before they are deleted.

New Subfolder

Description

Settings

Approvals

User Access

Draft Content Default Folder

This folder will be used to store all draft content until it is saved initially. There can only be one of these folders in a system.

Default View Folder

This folder will be used to store views that are automatically created. There can only be one of these folders in a system.

Version History

Keep Historical Versions

Historical result sets can be stored for the contents of this folder, restricted by the following size and period settings.

Max Size

Define the amount of storage available for caching content in this folder (in KB).

1,000

Max Versions

Define the number of historical result sets that will be accessible, per report.

20

Max Age

Define how long the historical result sets should be stored before they are deleted.

5

Year

Save

Cancel

Approvals

Request for Expert Approval - Define if publishing into this folder requires approval by an expert.

If this is enabled, you need to define who can approve content for this folder. To select an expert approver, you can enter the name of a user or a user group in the box or you can click on the drop-down list.

New Subfolder

Description

Settings

Approvals

User Access

Folder name

Folder name

Description

Provide a description to help identify the purpose of this folder and the content within it. (Optional)

Folder Hierarchy

This sub folder will be stored within the selected folder, and will contain content.

Tutorial

Sort Order

Define a specific sort order value if you don't wish the folder to be sorted alphabetically. 0 will result in standard sorting.

Save

Cancel

User Access

Folder Security:

Unsecure - This option is used in conjunction with a multicast license and guest login to provide access to content in this folder without logging in. This behaves like a Public folder for users that are logged in.

Public - All users will be able to see the content stored in this folder.

New Subfolder

Description

Settings

Approvals

User Access

Folder Security

Unsecure

This option is used in conjunction with a multicast license and guest login to provide access to content in this folder without logging in.

Save

Cancel

Private - Only the users selected here will be able to see and interact with the content stored in this folder, based on the level of access specified.

Users can have access to Edit, Read, and Delete.

New Subfolder

Description

Settings

Approvals

User Access

Folder Security

Unsecure

This option is used in conjunction with a multicast license and guest login to provide access to content in this folder without logging in.

Save

Cancel

- Click **Save** to create your folder.

Edit Folders

To Edit a Folder or Sub Folder, users can click on the triple dots menu icon  next to the Folder or Sub Folder name and click on Edit Settings.

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Logout

All Content

My Content

Recent

Favourites

More

All Folders

Tutorial (5)

Athletes

Camp

KPIs

Marketing &...

Training

All Data Sources

All Content

Search...

Filter By Type

Clear All

Name	Description	Last Modified	Status
Administration Tour	Learn about the different areas and functions available in t...	4/6/2020 5:00 PM	Pub
Agency Benchmark	Top N Agencies compared to all other Agencies by demog...	3/6/2020 5:26 PM	Pub
Agency Sales by Profitability	An analysis of the agency sales and their ranked profitability	28/2/2020 3:38 ...	Pub
Analysis	This is an analytic tab that is used to understand examine ...	3/6/2020 5:51 PM	Pub
Athlete	An athlete KPI report used to highlight KPI dashboard tab f...	23/1/2020 1:16 ...	Pub
Athlete Cost Summary	View athlete cost summaries by gender, demographic, and...	26/6/2017 1:15 ...	Pub
Athlete Demographic Breakdown		3/6/2020 5:53 PM	Pub
Athlete Demographic Spread	A bubble scatter that displays the spread of athletes by ag...	3/6/2020 4:17 PM	Pub
Athlete GIS Google Map		26/6/2017 1:15 ...	Pub
Athlete GIS Map	View invoicing and camp rating figures by athlete location ...	26/6/2017 1:15 ...	Pub
Athlete Invoice Summary	View athlete invoicing summaries by gender, demographic,...	26/6/2017 1:15 ...	Pub
Athlete Invoiced GIS Heat Map		26/6/2017 1:15 ...	Pub
Athlete Location	Athlete Location points on a GIS map for layering.	4/6/2020 4:05 PM	Pub
Athlete Profit Summary	View athlete profit summaries by gender, demographic, an...	26/6/2017 1:15 ...	Pub

yellowfin

+

Logout

All Content

My Content

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Tutorial (5)

Athletes

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Filter By Type

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Name	Description	Last Modified	Status
Administration Tour	Learn about the different areas and functions available in t...	4/6/2020 5:00 PM	Pub
Agency Benchmark	Top N Agencies compared to all other Agencies by demog...	3/6/2020 5:26 PM	Pub
Agency Sales by Profitability	An analysis of the agency sales and their ranked profitability	28/2/2020 3:38 ...	Pub
Analysis	This is an analytic tab that is used to understand examine ...	3/6/2020 5:51 PM	Pub
Athlete	An athlete KPI report used to highlight KPI dashboard tab f...	23/1/2020 1:16 ...	Pub
Athlete Cost Summary	View athlete cost summaries by gender, demographic, and...	26/6/2017 1:15 ...	Pub
Athlete Demographic Breakdown		3/6/2020 5:53 PM	Pub
Athlete Demographic Spread	A bubble scatter that displays the spread of athletes by ag...	3/6/2020 4:17 PM	Pub
Athlete GIS Google Map		26/6/2017 1:15 ...	Pub
Athlete GIS Map	View invoicing and camp rating figures by athlete location ...	26/6/2017 1:15 ...	Pub
Athlete Invoice Summary	View athlete invoicing summaries by gender, demographic,...	26/6/2017 1:15 ...	Pub
Athlete Invoiced GIS Heat Map		26/6/2017 1:15 ...	Pub
Athlete Location	Athlete Location points on a GIS map for layering.	4/6/2020 4:05 PM	Pub

Content Approval

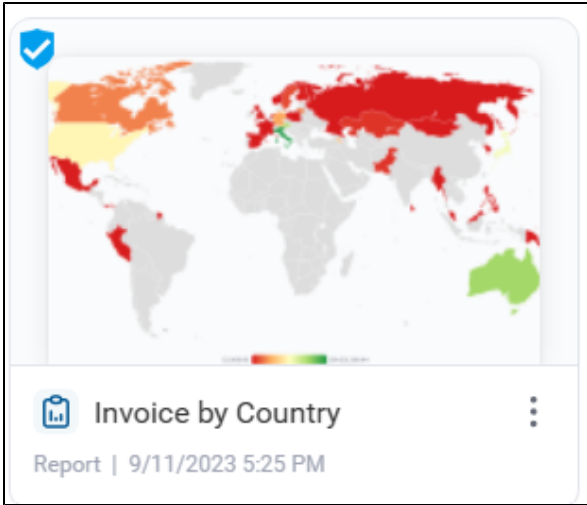
Content, such as Views or Stories, that require approval, will appear with a 'Approval Required' tag on them in the Browse page.

Approval Required

Invoice by Country

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Content that gets approved will display an approval icon on them to signify their authorization.



To learn more about the View Approval process, click [here](#).

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