

Comments, Tasks, and Decisions

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Overview

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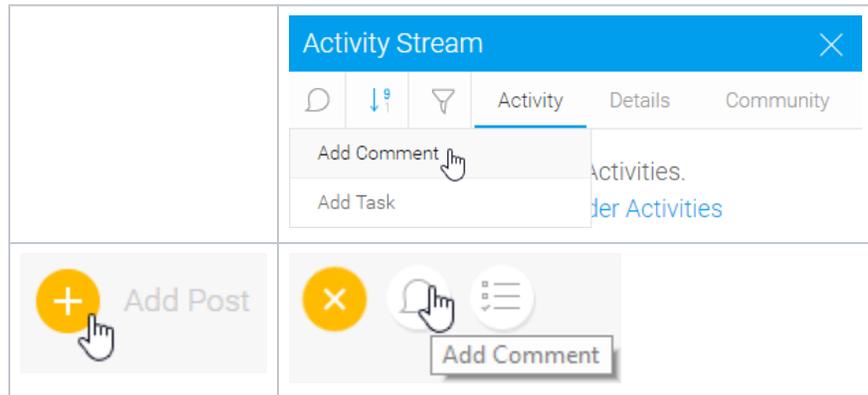
Yellowfin collaboration functions allow users to work together in a variety of ways, encouraging decision making and discussions related to content and business data. Comments, Decisions, and Tasks are available on content pages (Reports, Dashboard Tabs, and Storyboards), Discussion Streams, and Timelines.

Comments

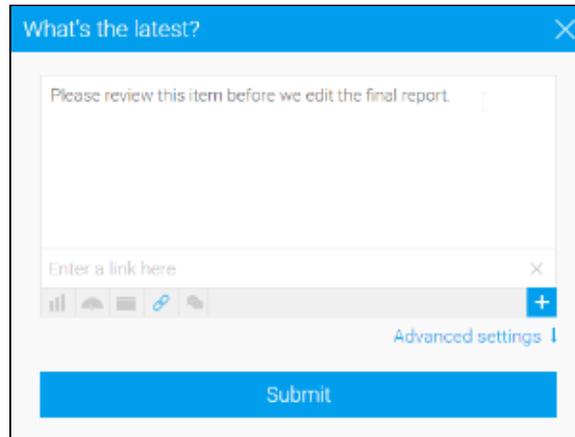
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Comments can be added on a variety of pages, including content pages (report, dashboard, storyboard), discussion streams, and user timelines. In order to create a comment, follow these steps:

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

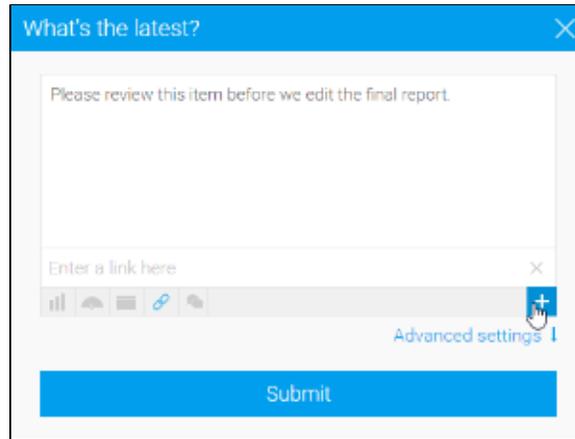


2. Enter the body text of your comment.



3. Add any attachments that may be required.

See [Attachments](#)
for more
information



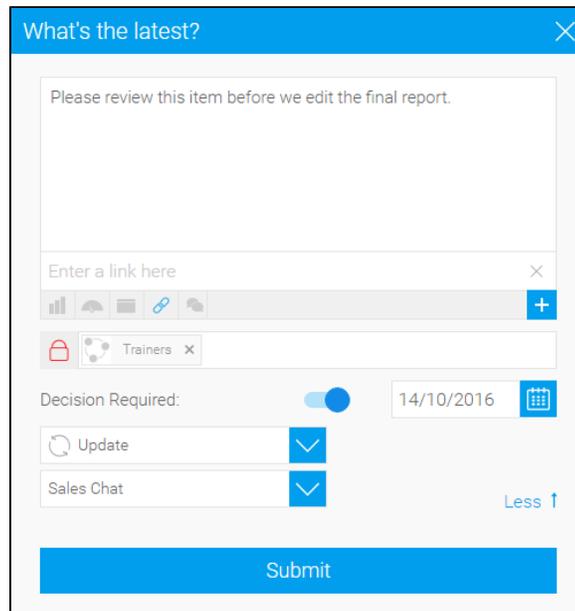
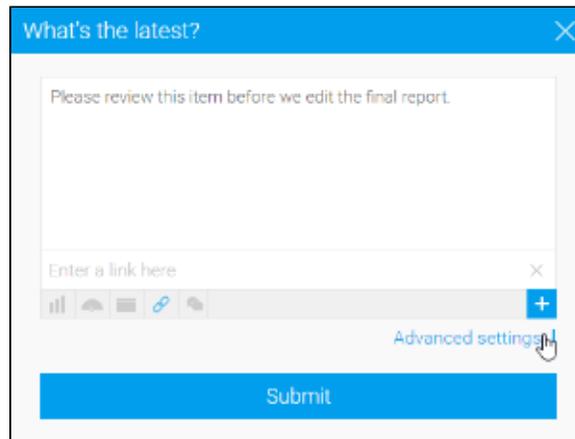
4. Open the **Advanced Settings** if they are required.

From here you can adjust:

- **Security** - this allows you to adjust if it's a **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:

-  Update
-  Opportunity
-  Issue

- **Stream** - allows you to specify which stream the post it attached to.



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

What's the latest? ✕

Please review this item before we edit the final report.

Enter a link here ✕

📷 📺 📄 🔗 📄 +

[Advanced settings](#) ↓

Submit

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

Discussion Stream ✕

↓ ↑ +0 🚩 🔗 ⋮

Teresa Pringle 7/10/2016 1:38 PM
Posted on [Training Planning](#)

Do we need to split up the current course into smaller modules?

🏠 Discussion Stream Propose Resolution ∨

2. Enter the body text of your task request.

3. Add any attachments that may be required.

[See Attachments](#)
for more
information

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: 👍 ⋮

Poll Question

Submit

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.

The screenshot shows a 'Propose Resolution' dialog box. At the top, there is a blue header with the title 'Propose Resolution' and a close button. Below the header is a text area containing the proposal: 'I think we should split up the advanced section further. Perhaps we could vote on how many?'. Underneath the text area is a link input field with the placeholder 'Enter a link here'. Below the link field is a toolbar with icons for bar chart, pie chart, document, link, and speech bubble, along with a plus sign. The 'Decision Style' is set to a thumbs-up icon and a list icon. Below this is a text field labeled 'We should split into:'. Underneath are two list items: '1 (don't split)' and '3 parts', each with a menu icon on the left and a close button on the right. Below the list items is a button labeled 'Click to add option'. At the bottom of the dialog is a large blue 'Submit' button.

5. **Submit** your proposal.

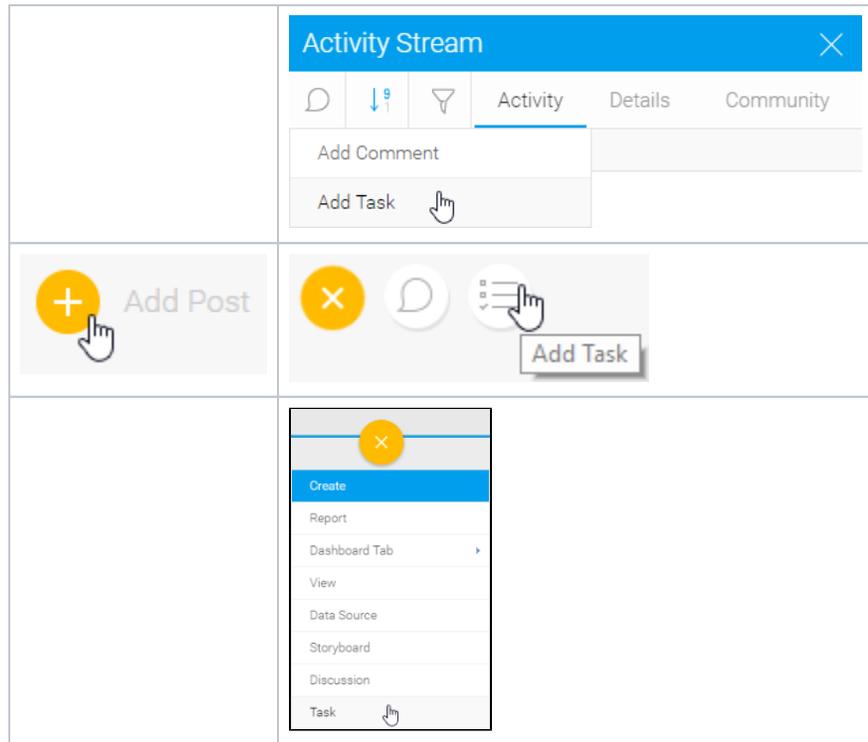
This screenshot shows the same 'Propose Resolution' dialog box as the previous one, but with an additional option added to the list. The list now contains three items: '1 (don't split)', '3 parts', and '5 parts'. The '5 parts' option is currently selected, indicated by a blue border around its input field. The 'Click to add option' button is still visible below the list. The 'Submit' button at the bottom is now being clicked by a mouse cursor.

Tasks

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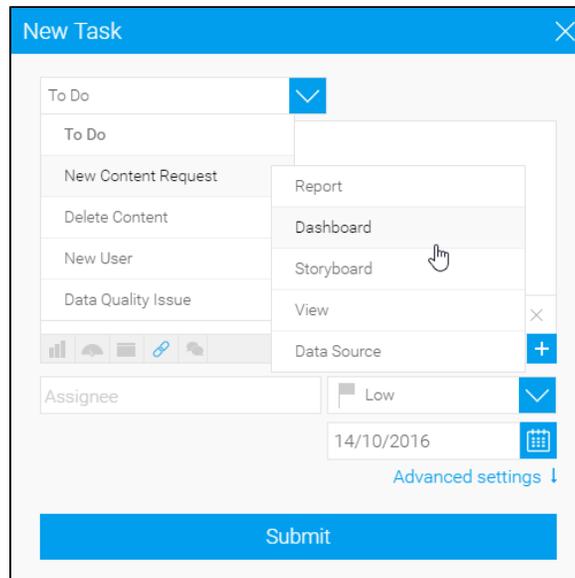
Tasks can be created and assigned to users for a variety of functions, covering simple 'to do' notes all the way through to data quality checks and content change requests. In order to create a task, follow these steps:

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

New Task [X]

Data Quality Issue [v]

Review the ETL job for the Ski Team Location warehouse.

Enter a link here [X]

Assignee [] [v]

Low [v]

14/10/2016 [v]

Advanced settings [v]

Submit

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.

New Task [X]

Data Quality Issue [v]

Review the ETL job for the Ski Team Location warehouse.

Enter a link here [X]

Jessica Flower [X] [v]

Medium [v]

14/10/2016 [v]

Advanced settings [v]

Submit

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