

Comments and Tasks

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Overview

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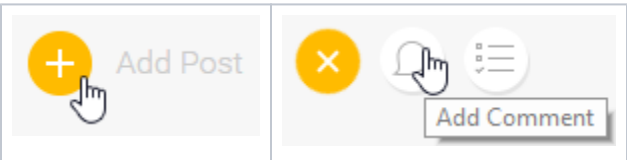
Yellowfin collaboration functions allow users to work together in a variety of ways, encouraging decision making and discussions related to content and business data. Comments and Tasks are available on content pages (Reports, Dashboard Tabs, and Storyboards), Discussion Streams, and Timelines. This section covers collaboration functions available on Discussion Streams and Timelines. For the collaborative functions on content pages, refer to the [Activity Stream](#) page.

Comments

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In order to create a comment in discussion streams, and user timelines, follow these steps:

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



2. Enter the body text of your comment.

A screenshot of a dialog box titled 'Post a message to this topic.' with a close button (X) in the top right corner. Inside the dialog, there is a large text area with the placeholder text 'Enter your comment here'. Below the text area is a smaller input field with the placeholder text 'Enter a link here' and a close button (X) on the right. At the bottom of the dialog, there is a row of icons: a bar chart, a pie chart, a document, a link, and a speech bubble. To the right of these icons is a blue button with a white plus sign. Below the icons and button is a link that says 'Advanced settings' with a downward arrow. At the very bottom of the dialog is a large blue button labeled 'Submit'.

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 **P**ublic post (meaning that it will rely on the content or stream security it belongs to), or **P**rivate post (allowing you to secure to specific users and/or groups).

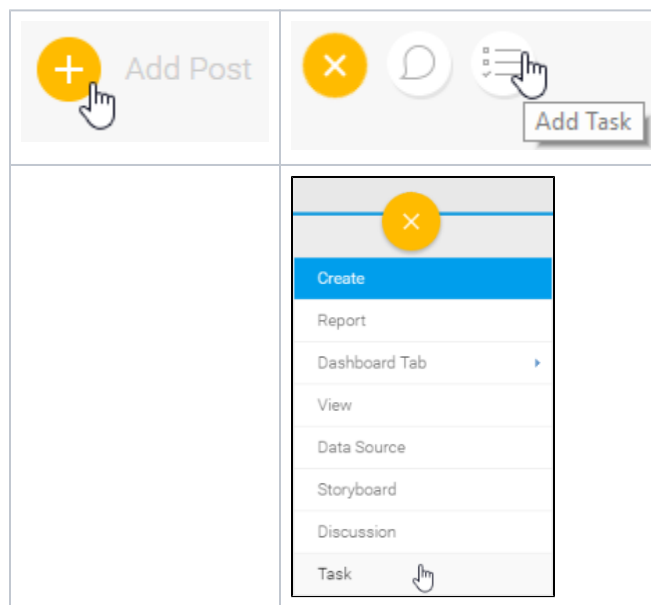
5. Click **Submit** to save your comment.

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
 - Data Transformation
- Delete Content
- New User

- Data Quality Issue

The 'New Task' form has a blue header with a close button. Below the header, there's a 'To Do' dropdown menu that is open, showing options: 'To Do', 'New Content Request', 'Delete Content', 'New User', 'Data Quality Issue', 'Report', 'Dashboard', 'Storyboard', 'View', 'Data Source', and 'Transformation Flow'. The 'Data Quality Issue' option is highlighted. Below the dropdown, there are icons for adding attachments (document, image, video, link, etc.). There's an 'Assignee' field, a date field set to '14/11/2018', and a 'Submit' button at the bottom.

3. Enter the body text of your task request.
4. Add any attachments that may be required.

See [Attachments](#) for more information

The 'New Task' form now has 'Data Quality Issue' selected in the dropdown. The task body text 'Review the ETL job for the Ski Team Location warehouse.' is entered. Below the text area, there's a link input field 'Enter a link here' with a plus icon. The 'Assignee' field is empty, the priority is set to 'Low', and the date is '14/10/2016'. There's a link to 'Advanced settings' and a 'Submit' button at the bottom.

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:

The 'New Task' form now has 'Data Quality Issue' selected. The task body text 'Review the ETL job for the Ski Team Location warehouse.' is entered. Below the text area, there's a link input field 'Enter a link here' with a plus icon. The 'Assignee' field now shows 'Jessica Flower' with a close button. The priority is set to 'Medium', and the date is '14/10/2016'. There's a link to 'Advanced settings' and a 'Submit' button at the bottom.

- **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 task.

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