

# Attachments

- [Overview](#)
- [Content](#)
- [Link](#)
- [File](#)
- [Video](#)
- [Screenshot](#)
- [Image](#)

## Overview

[top](#)

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

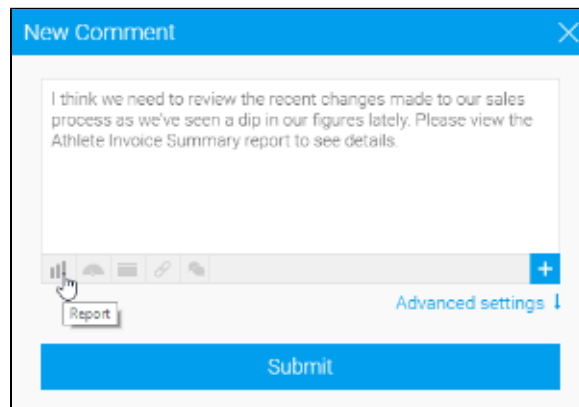
[top](#)

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.

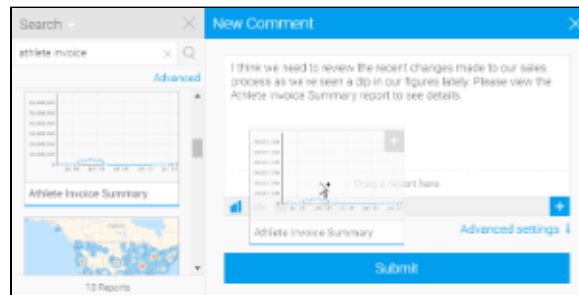
The following steps can be applied to adding a Report, Dashboard Tab, Storyboard, or Discussion Stream:

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

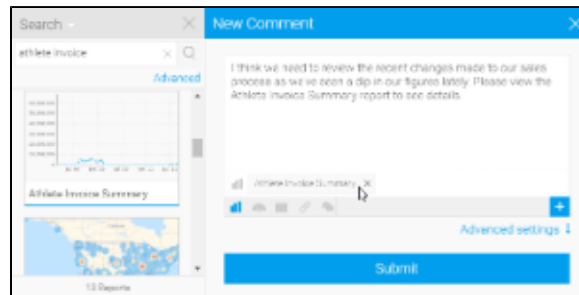
-  Report
-  Dashboard Tab
-  Storyboard
-  Discussion Stream



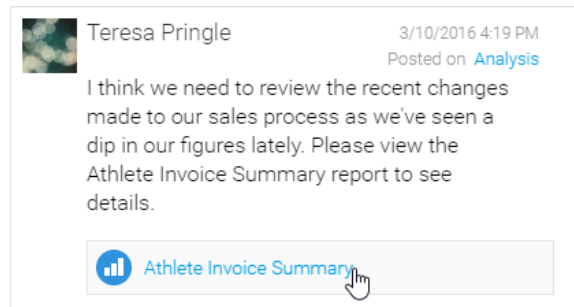
2. Locate the item you want to attach, and drag it into the attachment area.



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.



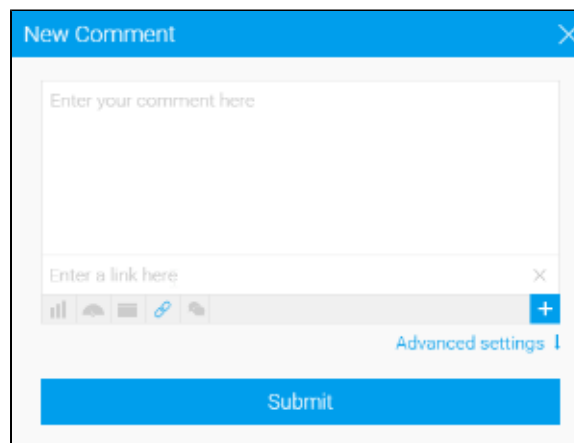
A screenshot of a comment interface. At the top left is a small profile picture of Teresa Pringle. To its right is the name 'Teresa Pringle' and the timestamp '3/10/2016 4:19 PM'. Below the name is the text 'Posted on [Analysis](#)'. The main body of the comment reads: 'I think we need to review the 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.' At the bottom of the comment is a link with a bar chart icon and the text 'Athlete Invoice Summary'. A mouse cursor is pointing at this link.

## Link

[top](#)

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.



A screenshot of a 'New Comment' form. It has a blue header with the title 'New Comment' and a close button. The form contains two text input fields: 'Enter your comment here' and 'Enter a link here'. Below the link field is a row of icons: a bar chart, a pie chart, a document, a link, and a speech bubble. A blue plus icon is to the right of these icons. Below the icons is a link to 'Advanced settings'. At the bottom is a large blue 'Submit' button.

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



A screenshot of the 'New Comment' form, similar to the previous one. The 'Enter your comment here' field now contains the text 'Check out this blog post - it has some great data vis!'. The 'Enter a link here' field contains the URL 'http://www.yellowfinbi.com/YFCommunityNews-Data-vi'. The rest of the form, including the icons and the 'Submit' button, remains the same.

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



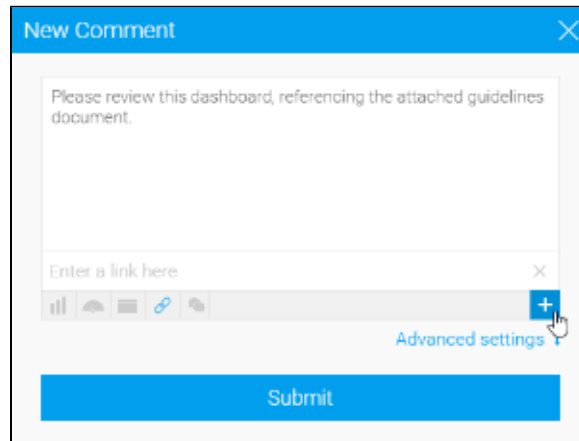
A screenshot of the published comment. It shows the profile picture, name 'Teresa Pringle', and timestamp '3/10/2016 4:43 PM'. The text 'Posted on [Analysis](#)' is present. The comment body now reads: 'Check out this blog post - it has some great data vis!' followed by a new line and the link '[Data visualization: Have the world'...](#)'. A mouse cursor is pointing at the link. At the bottom right of the comment box is a 'Reply' button.

## File

[top](#)

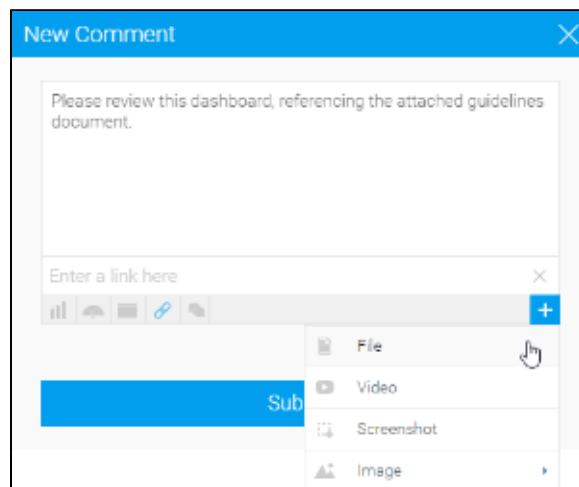
Files can be added to a comment/task in order to provide access to content from outside the system. The following steps can be used to add a file:

1. Click on the  icon.



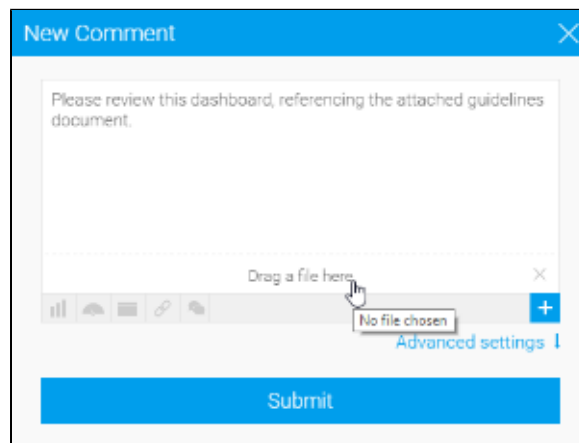
The 'New Comment' form has a blue header with a close button. The main text area contains the placeholder text 'Please review this dashboard, referencing the attached guidelines document.' Below this is a link input field with the placeholder 'Enter a link here'. A toolbar contains icons for adding content: a plus sign, a document, a video, a screenshot, and an image. The plus icon is highlighted with a mouse cursor. To the right of the toolbar is a link to 'Advanced settings'. At the bottom is a large blue 'Submit' button.

2. Select the  File option.



The 'New Comment' form is shown with the dropdown menu open from the plus icon. The menu options are 'File', 'Video', 'Screenshot', and 'Image'. The 'File' option is highlighted with a mouse cursor. The 'Submit' button is partially visible on the left.

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



The 'New Comment' form is shown with the file area highlighted. The file area has a dashed border and the text 'Drag a file here'. A mouse cursor is hovering over the file area. Below the file area is a toolbar with icons for adding content. A tooltip 'No file chosen' is visible over the plus icon. To the right of the toolbar is a link to 'Advanced settings'. At the bottom is a large blue 'Submit' button.



4. Submit your comment/task.

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

## Video

[top](#)

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:

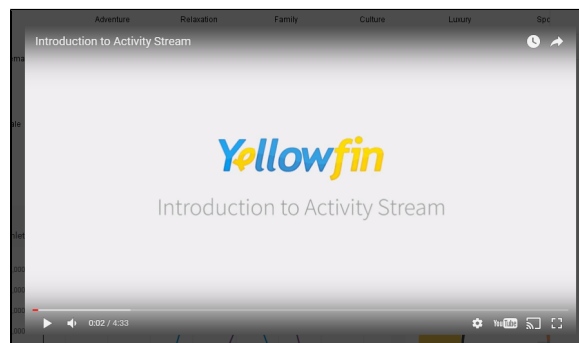
1. Click on the  icon and select the  Video option.

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.

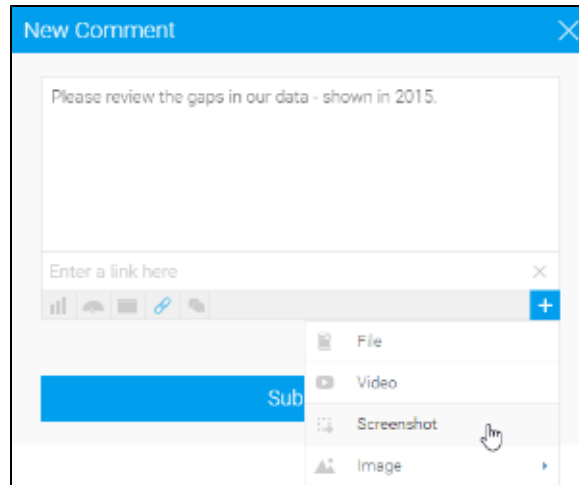


## Screenshot

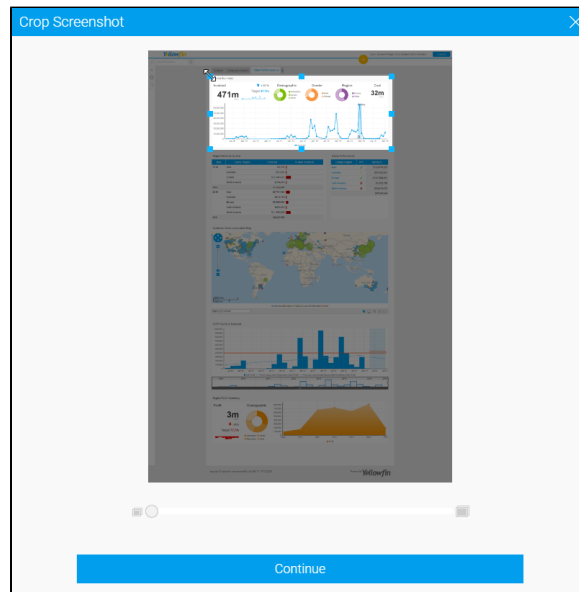
[top](#)

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.



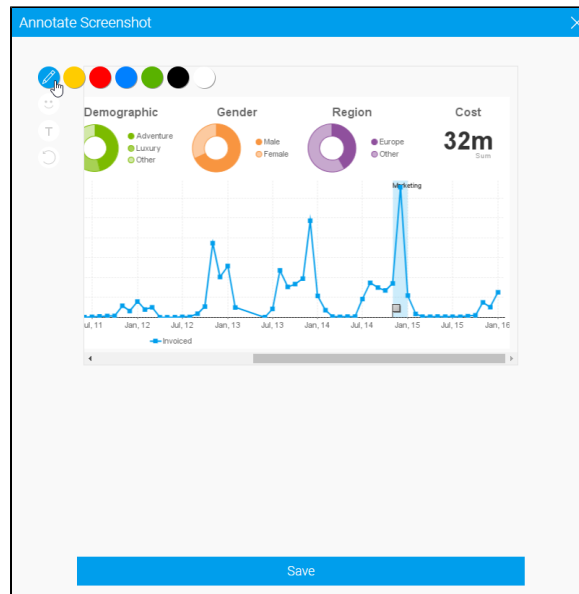
**Icons** - add preset icons to the screenshot.



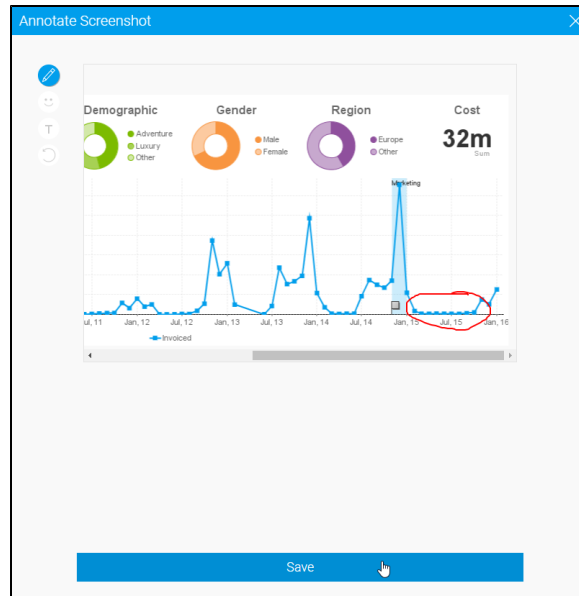
**Text** - include custom text on the screenshot.



**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.

New Comment

Please review the gaps in our data - shown in 2015.

Screenshot

Advanced settings

Submit

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

Teresa Pringle

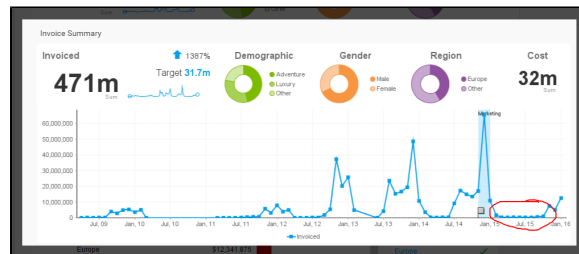
4/10/2016 12:03 PM

Posted on Sales Performa...

Please review the gaps in our data - shown in 2015.

Screenshot

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



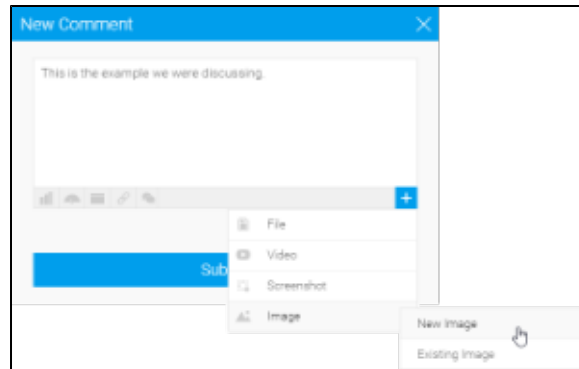
## Image

[top](#)

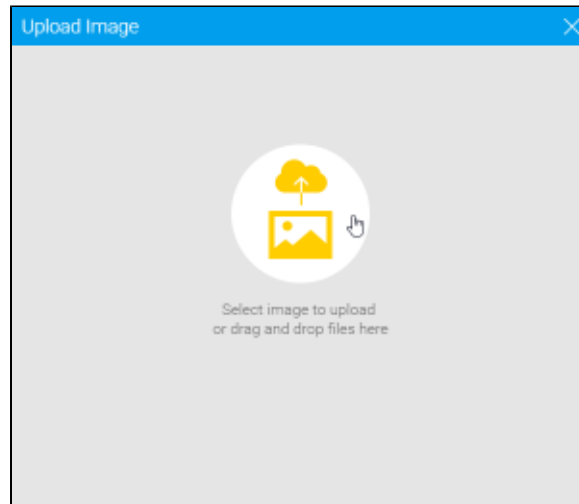
Images can be added to a comment/task in order to provide visual aids. The following steps can be used to add an image:

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

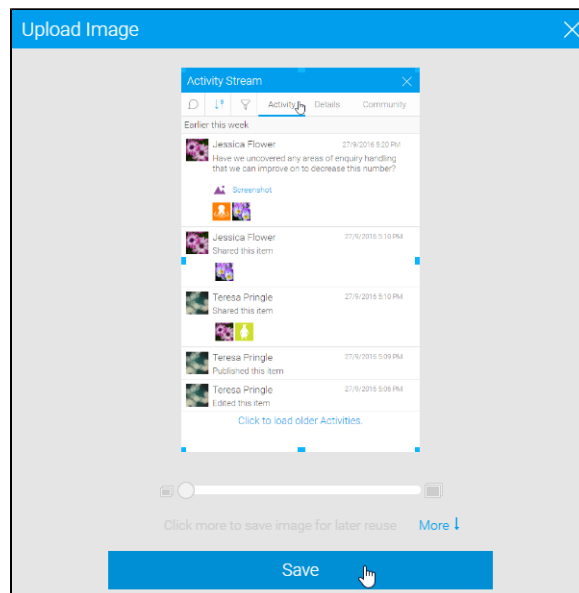
- a. New Image (see step 2)
- b. Existing Image (see step 4)



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

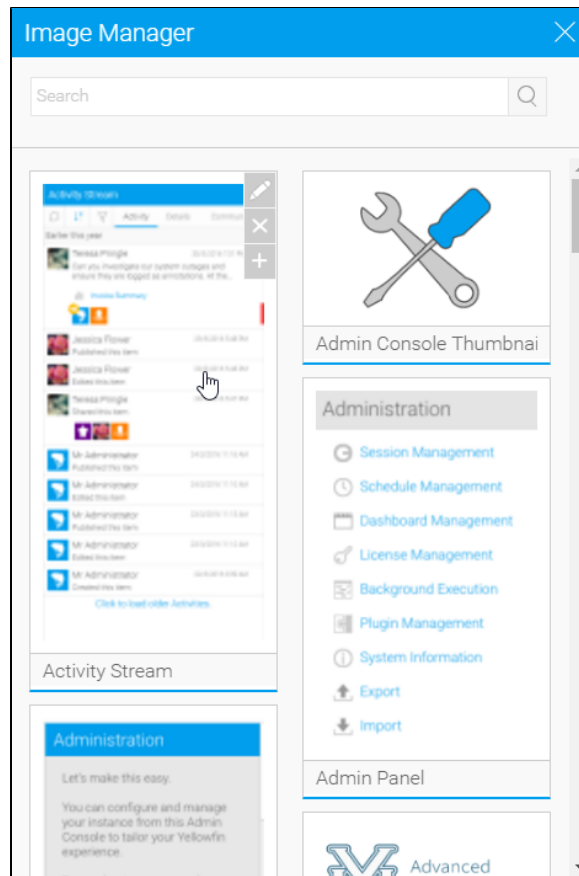


3. Crop the image if required, and Save. Proceed to step 5.

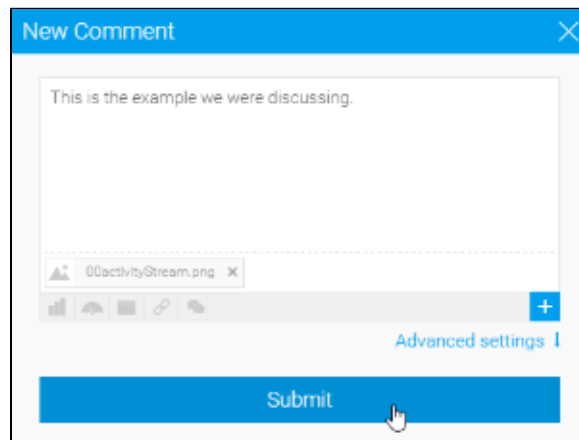


4. If you have selected Existing Image, browse and locate the image you wish to attach. Proceed to step 5.

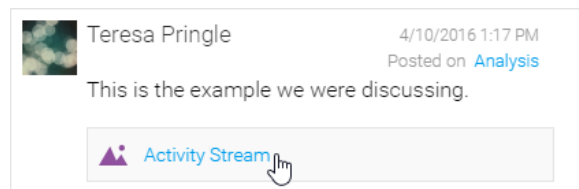




5. You will now see that your image has been attached to your comment /task. Submit your post.



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



[top](#)