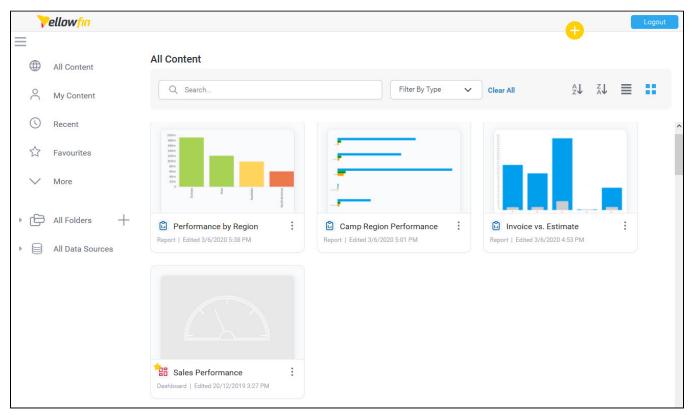
Browse Page

Overview Display

Thumbnails List Columns Available Columns Actions Mouse Actions o Menu Open in new tab Edit Details Deleting Content Search o 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.

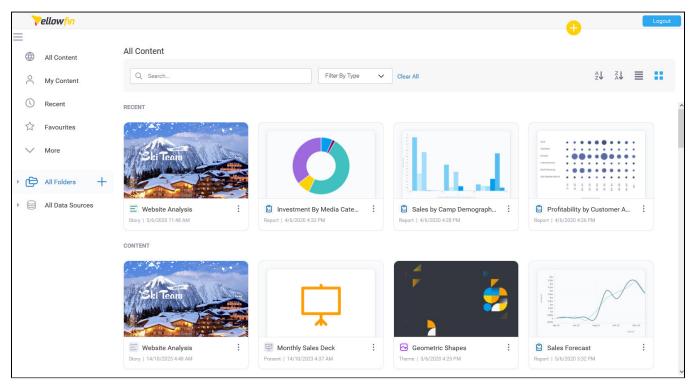


In the thumbnail layout, users can sort the content in ascending or descending order.

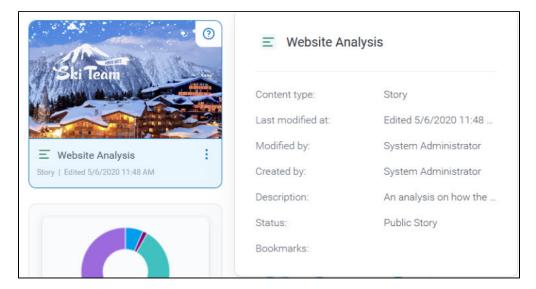


Thumbnails

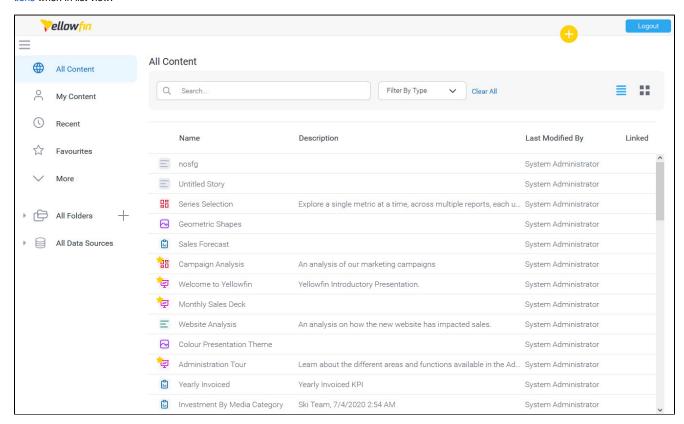
Each content item will be represented by a thumbnail. The thumbnail will display an image relevant to the content type, or a default image if the content has not been initialized.



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



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.



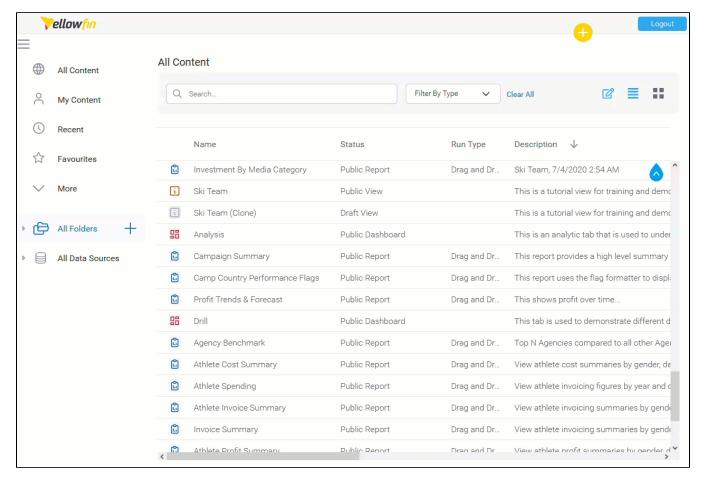
Columns

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.

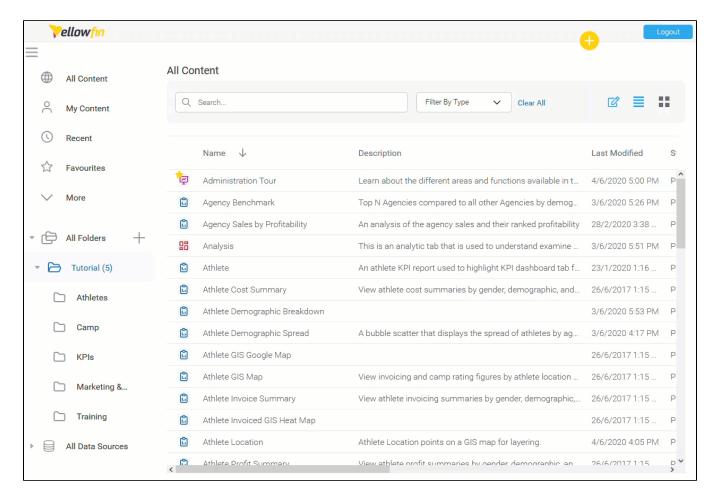
You have several options within the Columns popup:

- 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.



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.



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

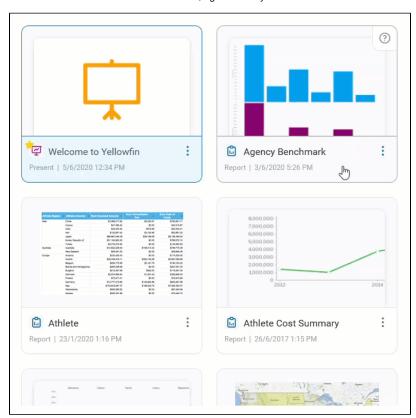
There are three different mouse actions that can be performed on the browse page in order to interact with content.

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		

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 ↓
88	Drill	Public Dashboard
88	GIS Maps	Public Dashboard
富	Sales Performance	Public Dashboard
88	Series Selection	Public Dashboard
ģ	Administration Tour	Public Presentation
卓	Monthly Sales Deck	Public Presentation
ۈ	Welcome to Yellowfin	Public Presentation
	Agency Benchmark	Public Report
C.	Agency Sales by Profitability	Public Report
Ci.	Athlete	Public Report
C.	Athlete Cost Summary	Public Report
(iii	Athlete Demographic Breakdown	Public Report

Published Content Menus

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

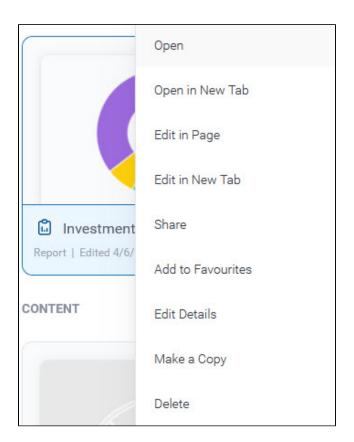
Drafts Content Menus

Dashboards - Presentations - Reports	Stories	Views
Open	Open	View Summary
Open in New Tab	Open in New Tab	Edit > Model
Edit Details	Make a Copy	Edit in New Tab Field Properties
Make a Copy	Delete	Edit Details Security Settings
Delete		Make a Copy Performance Settings
	<u> </u>	Delete 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

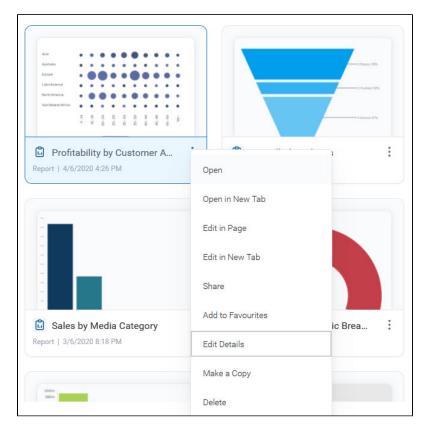
If you have the Multi-Tab Support configuration enabled, click on the menu of any content in the Browse page, and you will have additional options to open or edit that content in a new tab. You can also bring up the menu by right-clicking on the content thumbnail.



Edit Details

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

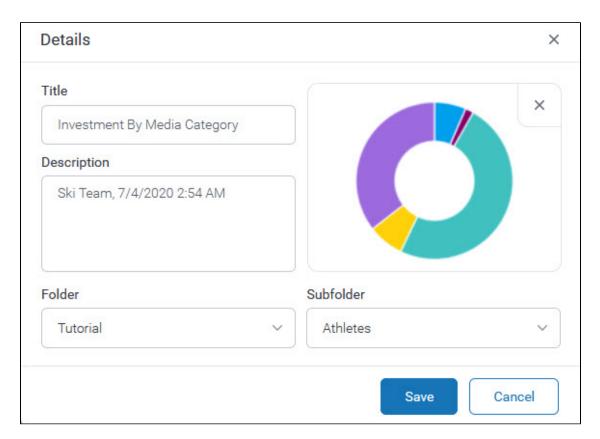
To Edit Details from a Thumbnail view, right-click anywhere in the tile or click on the three dot icon on the bottom right side of a thumbnail tile.



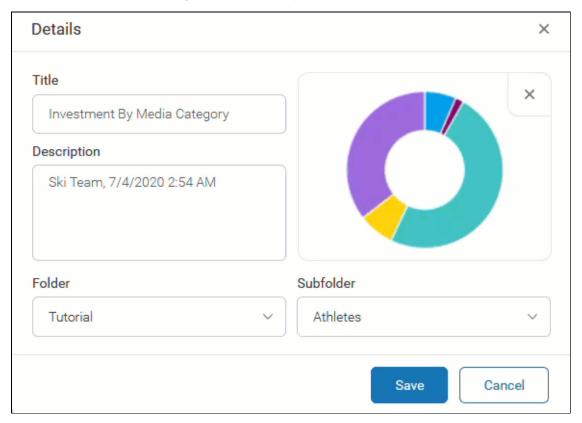
To Edit Details from a list view, right-click on the content item row.

	Name		Description
*sa	Campaign Ana	lvsis	An analysis of our marketing campaigns
i	Ski Team (Clc	Open	s is a tutorial view for training and demo purposes.
\equiv	Website Analy	Open in New Tab	analysis on how the new website has impacted sales.
~	Monthly Sales	Edit in Page	
88	Sales Perforn	Edit in New Tab	
88	Series Selecti	Edit in New Tab	lore a single metric at a time, across multiple reports, e
	Geometric Sh	Share	
	Sales Forecas	Remove from Dashboard	
† ₩	Welcome to Y	Edit Details	owfin Introductory Presentation.
恒	Monthly Sales	Make a Copy	
Ξ	Website Analy	Delete	analysis on how the new website has impacted sales.
R	Colour Preser	N-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1	

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



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



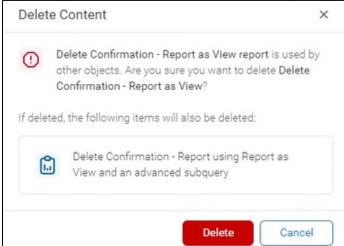
Deleting Content

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

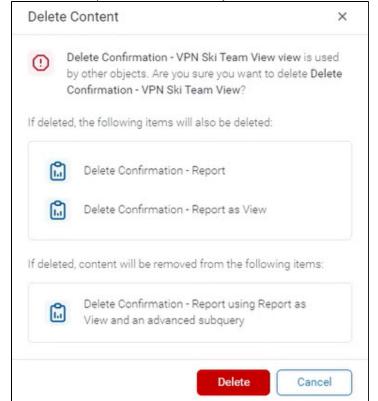
1. If the content item or items being deleted does not have dependencies, the user will simply be asked to confirm the delete.



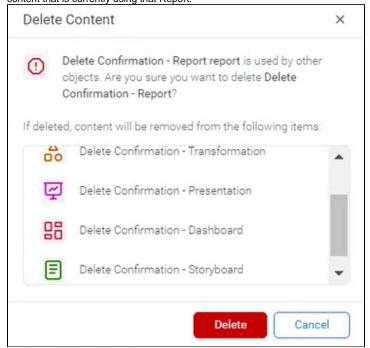
2. If the content item is a View, and that View has been used by other content (most commonly a Report), those Reports will be automatically deleted when the View is deleted. The user is shown the following warning including a list of the impacted Reports.



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



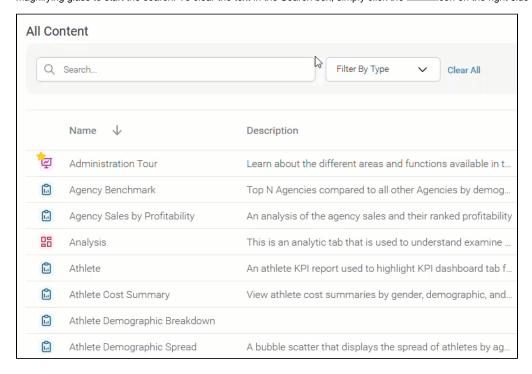
3. When a user attempts to delete a Report that is used by other content (such as included on a Dashboard or in a Story), the warning will list the content that is currently using that Report.



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.

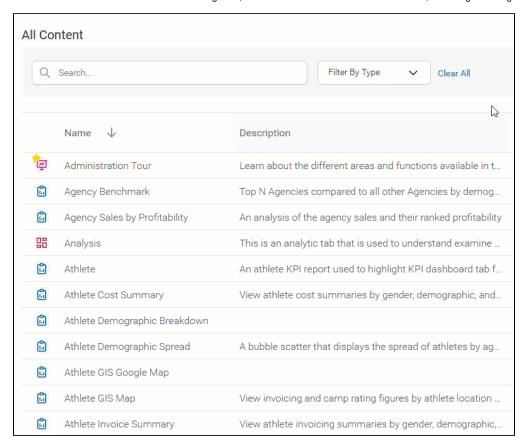


Filter By Type

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

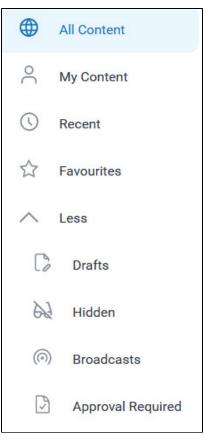
There are different options to filter your view:

- 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.



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
(1)	All Content	Allows all content that is available to you to be displayed, only restricted by your search and content type.
90	My Content	Allows users to filter the view to content they created or last modified.
(1)	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.
6	Drafts	Allows you to restrict the content that is displayed to only draft items, hiding all active content.
69	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.
(O)	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.

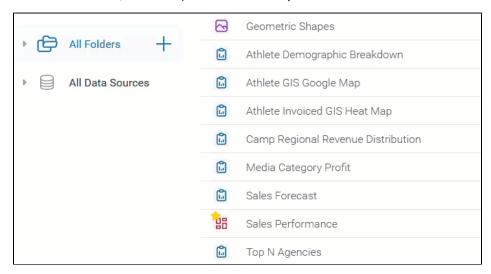
Folders/Data Source

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



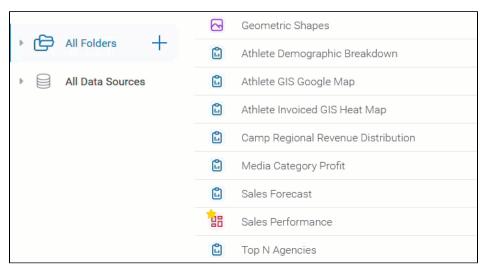
Browsing by Folder

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.



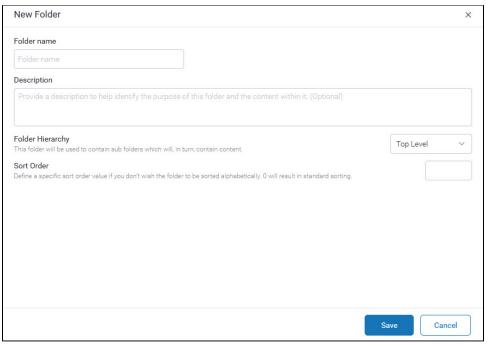
New Folders

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

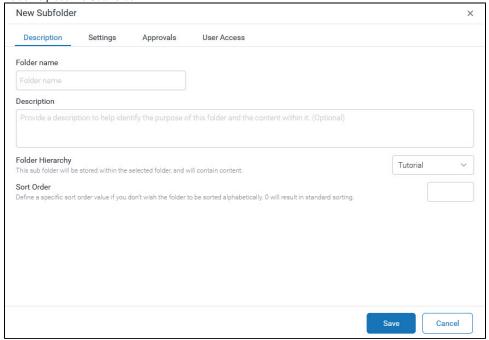
You can add new folders From the "All Folders" section on the left side.

- 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).



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**.



Complete the Sub folder window with the required fields.

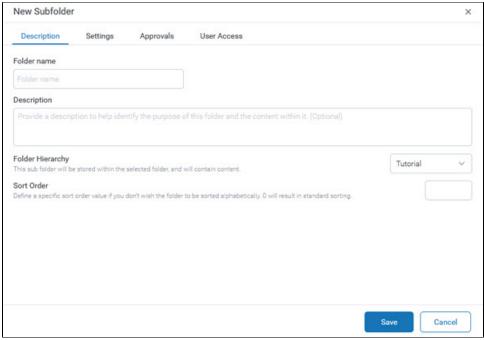
Description Tab

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.



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.

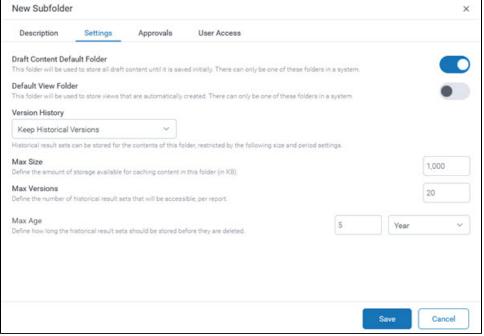
Default View Folder - Define if this folder will be used to store views that are automatically created. There can only be one folder to save draft views in a system.

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.

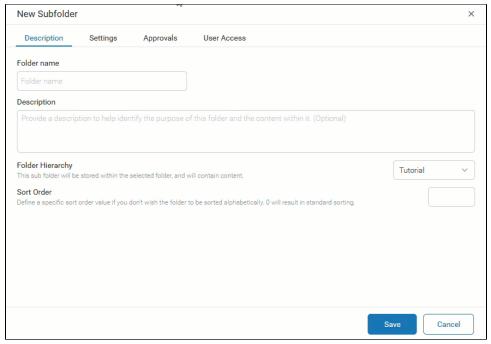
Max Age - Define how long the historical result sets should be stored before they are deleted.



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.

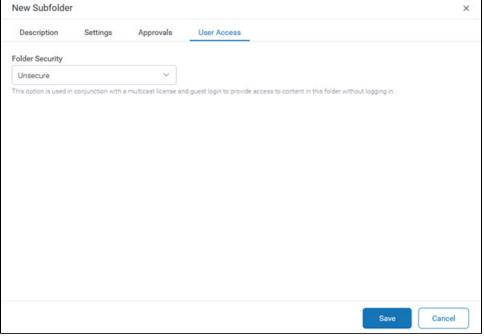


User Access

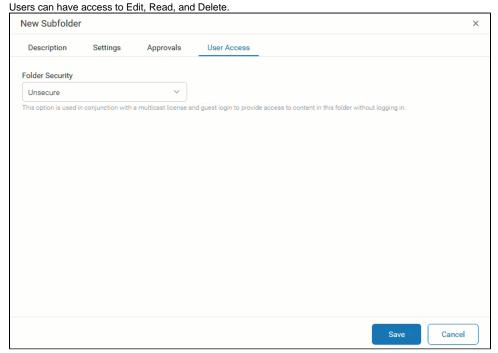
Folder Security:

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.



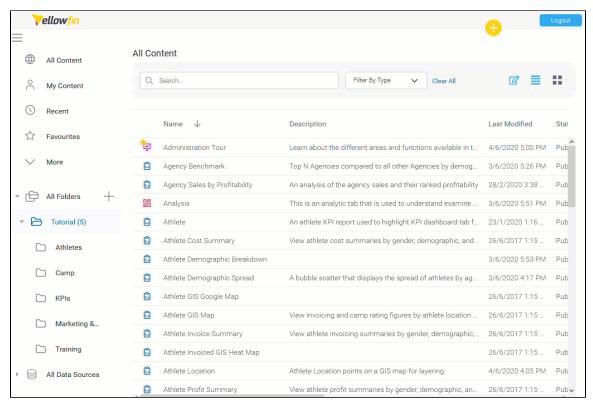
Private - Only the users selected here will be able to see and interact with the content stored in this folder, based on the level of access specified.

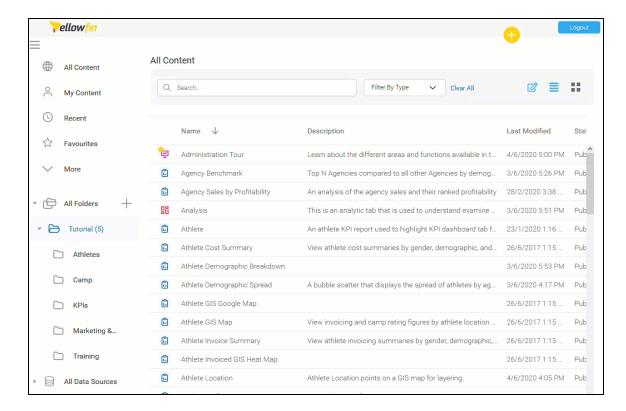


• Click Save to create your folder.

Edit Folders

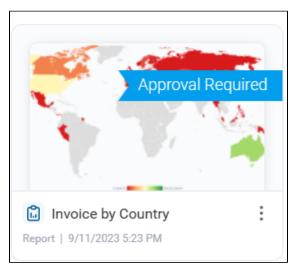
To Edit a Folder or Sub Folder, users can click on the triple dots menu icon next to the Folder or Sub Folder name and click on Edit Settings.





Content Approval

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



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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