



Data Platform

Folders Management for User Console Reports

Legal Information

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Managing Folders for User Console Reports

Reports in Data Platform's User Console can be organized in folders. To get to the folders management dialog, either click on the **Report Management** link on the upper-right hand corner of the home page, or use the drop-down menu associated with the **Reports** link on the top navigation bar to bring up **Report Management** page.

This document provides the guidelines to all operations that are possible as part of folders management in the User Console.

Opening the Folder Management Interface

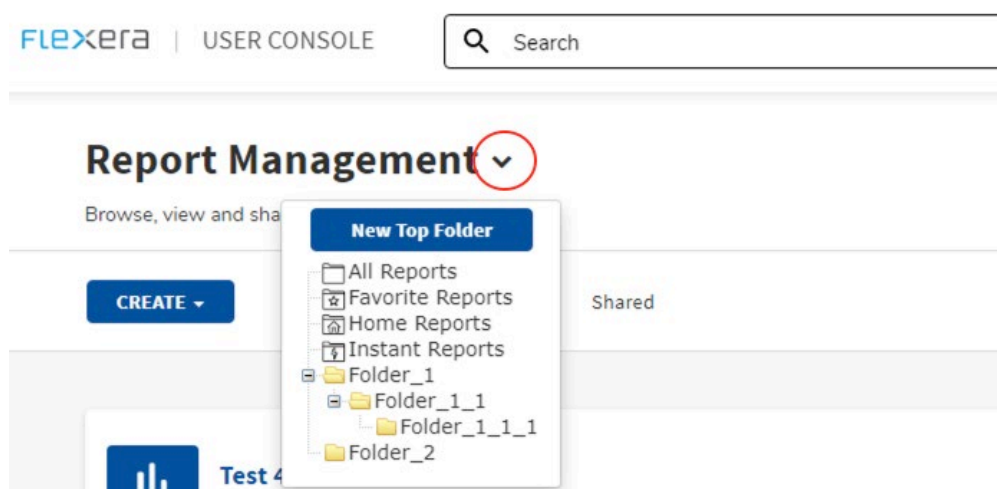
To open the folder management interface, perform the following steps.

To open the folder management interface:

1. On the **Report Management** page, click on the drop-down menu associated with the **Report Management** header to bring up the interface for folder management.

The drop-down menu shows all folders available in the User Console:

- Built-in folders:
 - All Reports
 - Favorite Reports
 - Home Reports
 - Instant Reports
 - User-created folders
2. Click on any of the folders to bring up the page showing all the reports stored in that folder.



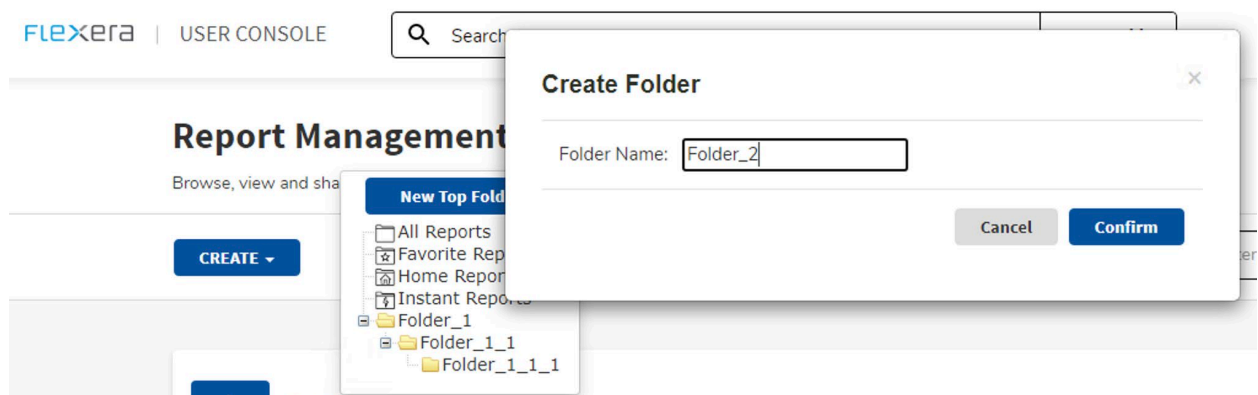
Creating a New Folder

To create a new folder, perform the following steps.

To create a new folder:

1. Click on the **New Top Folder** button
2. Type in the folder name
3. Click on **Confirm**

The newly-created folder will show up next time the folder management interface is brought up

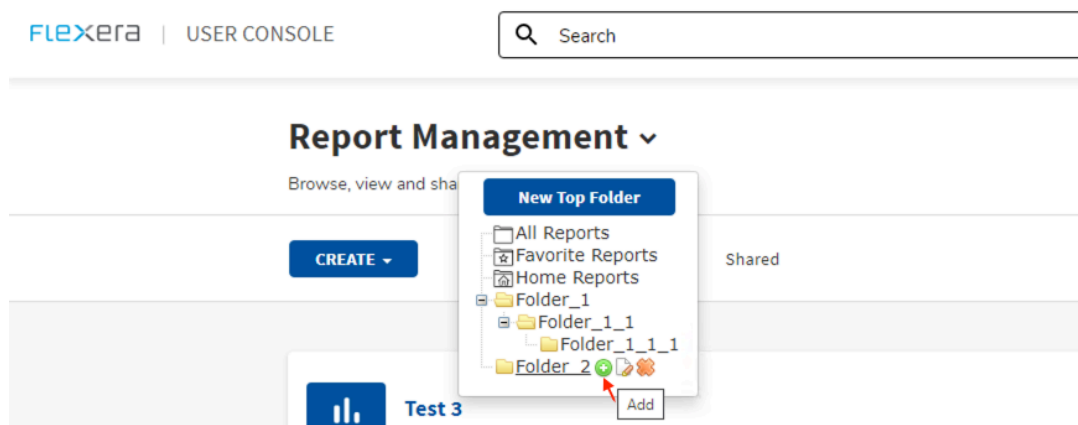


Creating a New Subfolder

To create a new subfolder, perform the following tasks.

To create a new sub-folder:

1. Hover over the folder within which the sub-folder to be created. Three menu buttons will show up.



2. Click on the + (**Add**, the leftmost) button.

3. Follow the same steps as the creation of a new folder.

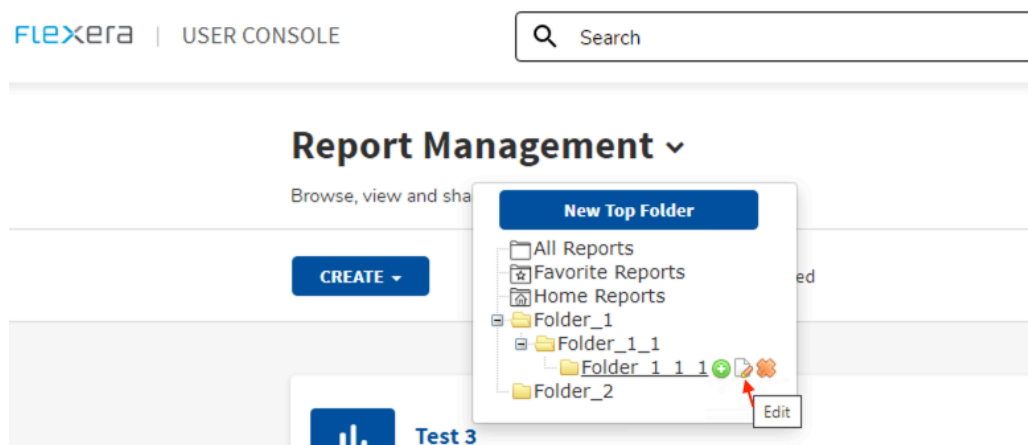
More sub-folders can be created at the same level or at the lower level of hierarchy (i.e., sub-sub-folder) by the same method.

Renaming an Existing User-Created Folder

To rename an existing user-created folder, perform the following steps.

To rename an existing user-created folder:

1. Hover over the folder to be renamed and click on the **Edit** (the middle) button.



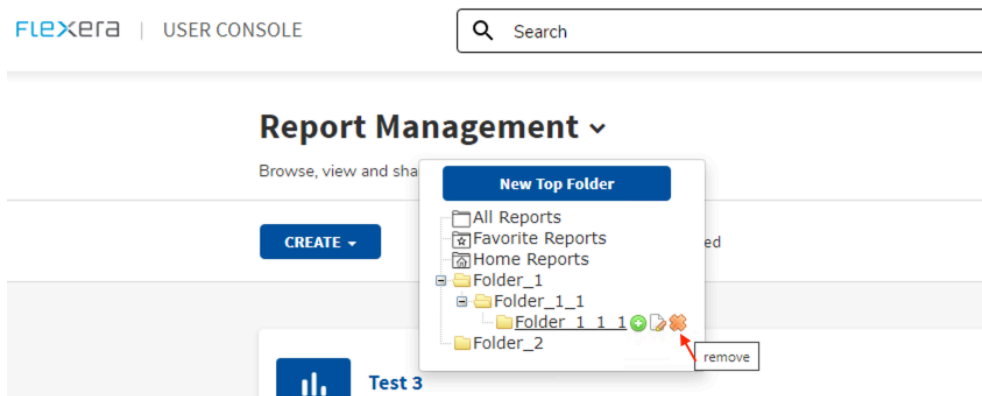
2. Edit the folder name.
3. Click on **Confirm**.

Deleting a User-Created Folder

To delete a user-created folder, perform the following steps.

To delete a user-created folder:

1. Hover over the folder to be deleted and click on the **X (Remove, the rightmost)** button.



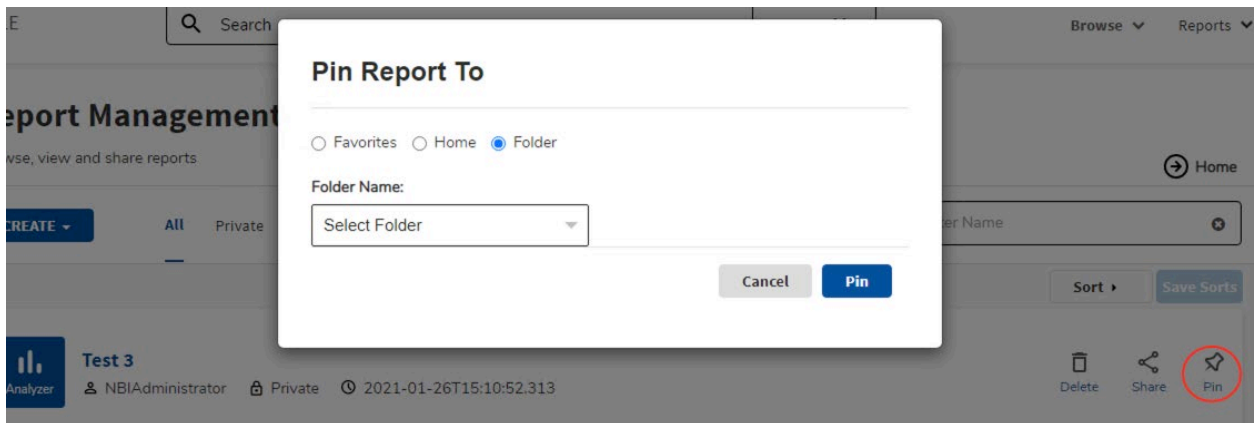
2. In the next dialog, check the box to delete reports inside the folder as well. Otherwise, leave the box unchecked to leave to preserve the reports (accessible in **All Reports** folder or any other folders already containing them).
3. Click on **Confirm**.

Adding Reports to a Folder

To add reports to a folder, perform the following steps.

To 'pin' (i.e., add) reports into a folder:

1. Find the report. Use the search box to filter to find the report quickly.
2. Click on the **Pin** button on the right-hand side of the report name. The **Pin Report To** dialog box opens.



The report can be pinned to **Favorites**, **Home**, or one of the user-created folders.

3. Click on **Pin** to confirm.

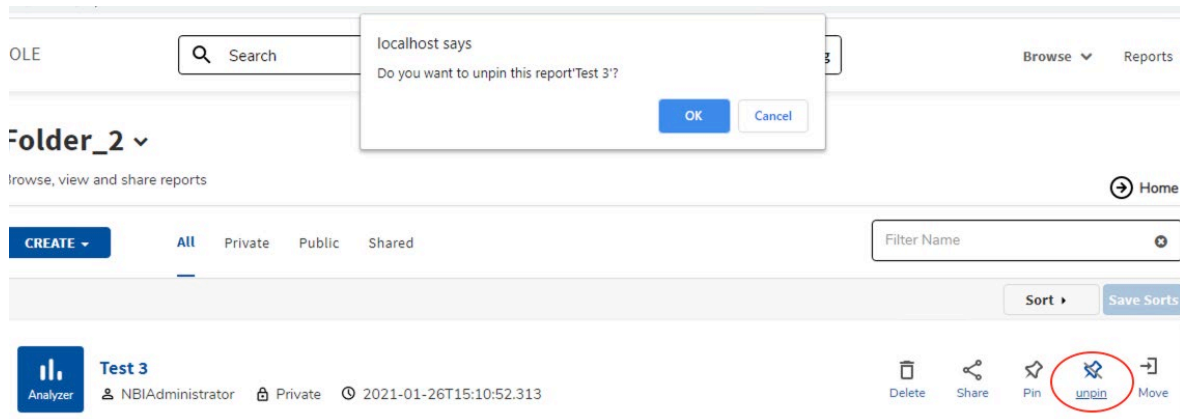
NOTE: A report can be pinned into multiple folders

Removing a Report from a Folder

To remove a report from a folder, perform the following steps.

To 'unpin' (i.e., remove) a report from a folder:

1. Go to the folder and find the report to be unpinned.
2. Click on the **Unpin** button on the right-hand side of the report name.



3. Click **OK** to confirm, or **Cancel** otherwise

The report will be removed from the folder, but it can still be found in **All Reports** folder or any other folder(s) already containing it.

4. To move the report to a different folder, use the **Move** button instead.
5. To remove the report permanently everywhere, use the **Delete** button instead.

Sorting Reports

You can sort reports using standard sorting options or manually.

- [Sorting Reports Using Standard Sorting Options](#)
- [Sorting Reports Manually and Saving the Sort](#)

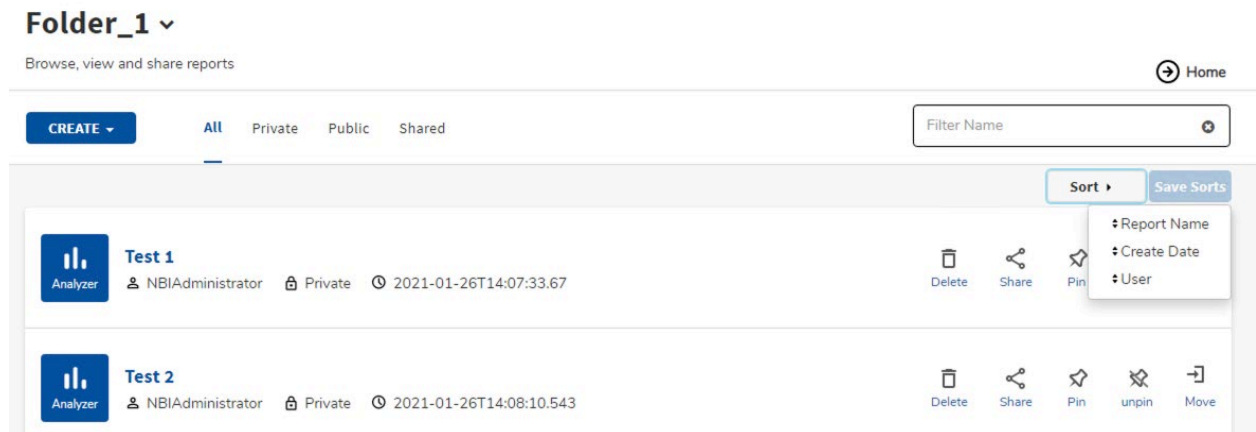
Sorting Reports Using Standard Sorting Options

To sort reports using standard sorting options, perform the following steps.

To sort reports in one of the 3 (three) standard sorting options:

1. Go to the folder which contains the reports to be sorted.
2. Click on the **Sort** button to bring down the options to sort by:
 - **Report Name**
 - **Create Date**
 - **User**

The first click sorts the report in the ascending order (A-Z, lower-higher), the second click sorts the report in the descending order (Z-A, higher-lower)

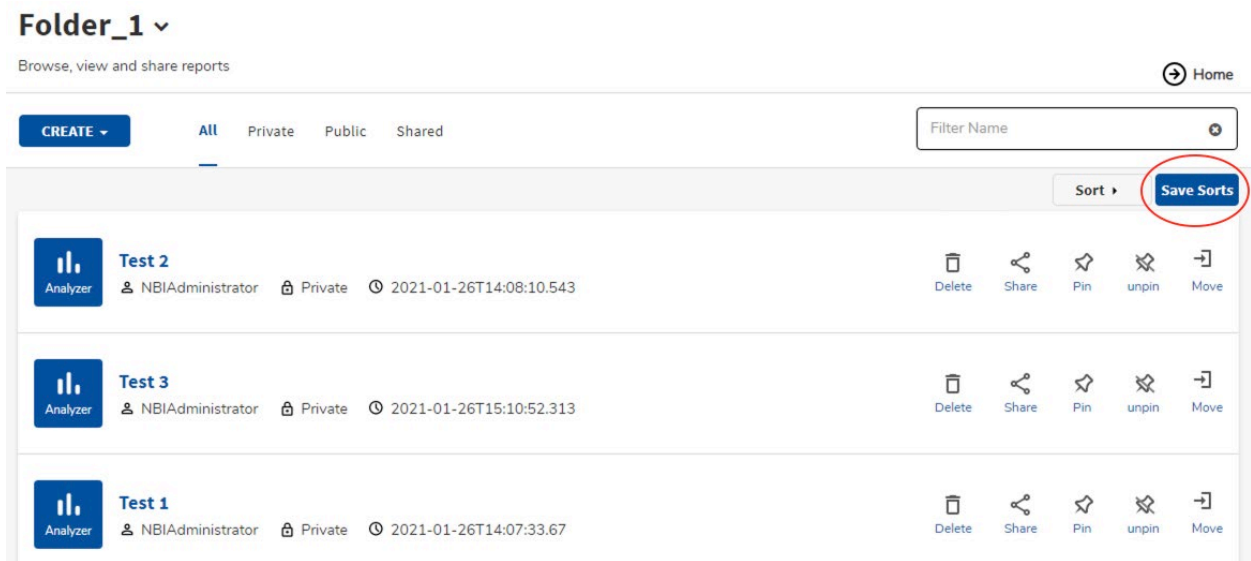


Sorting Reports Manually and Saving the Sort

To sort reports manually and save the sort, perform the following steps.

To sort reports manually (and save the resulting sort):

1. Go to the folder which contains the reports to be sorted.
2. Drag and drop any reports in the preferred order.
3. Click on **Save Sorts** button to save the order.



The order will be preserved next time the folder is shown.

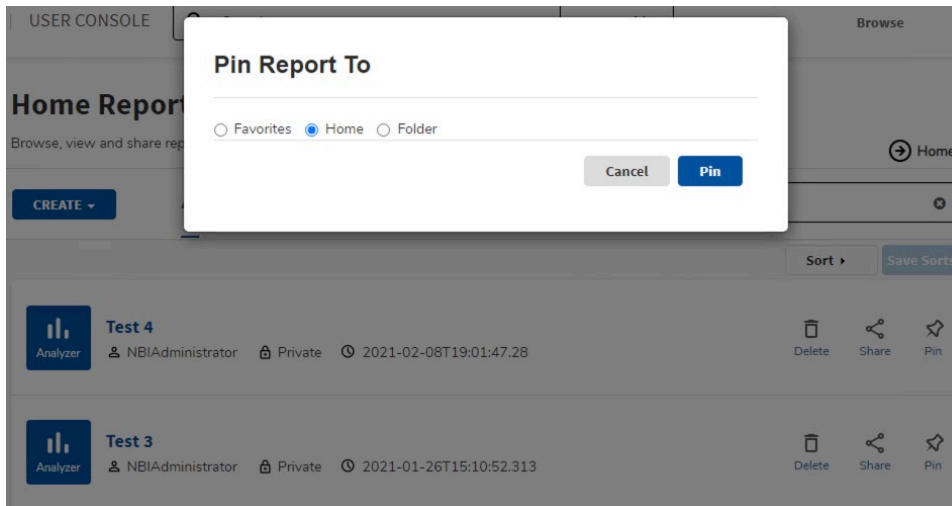
NOTE: Doing additional sorting by any of the three standard sorting options will temporarily change the sorting accordingly. The saved (manual) sorting will be preserved anytime the folder is shown.

Pinning Reports to the Home Page

To pin reports to the **Home** page, perform the following steps.

To 'pin' reports into the Home page:

1. Pinning reports into the **Home** page (the landing page when users logged into User Console) is essentially as simple as pinning them to the **Home** folder.



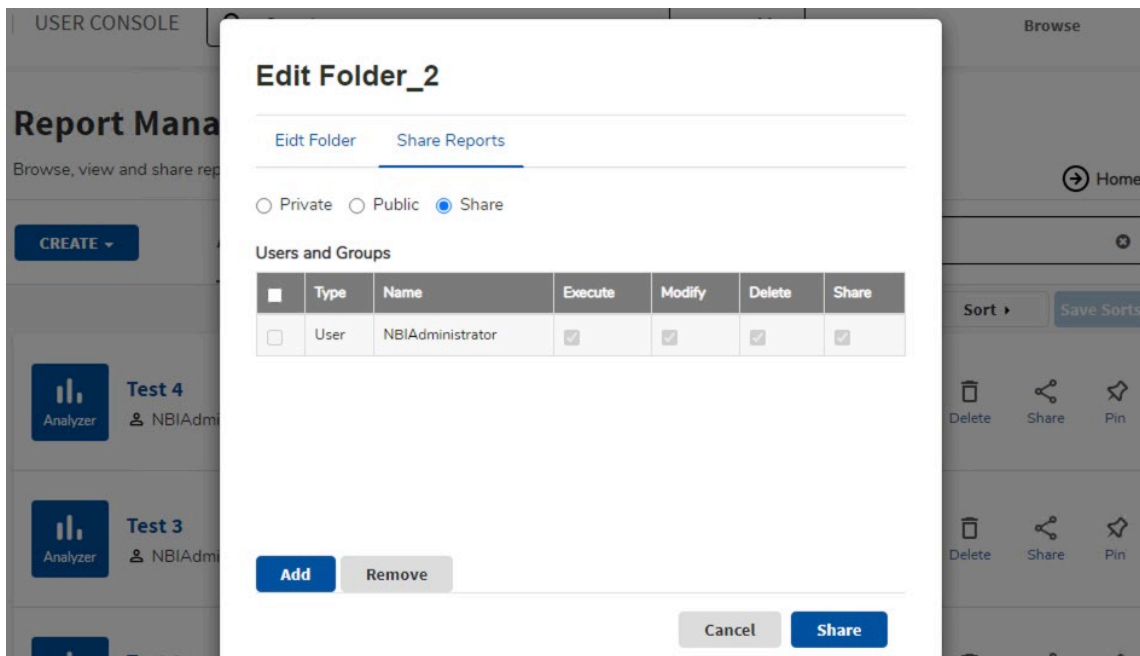
2. Up to 4 (four) reports can be pinned to the **Home** page.
3. The order by which the reports show up can be changed using either one of the standard sorting options (by **Report Name**, by **Create Date**, by **User**) or manual sorting.

Sharing a Folder of Reports

To share a folder of reports, perform the following steps.

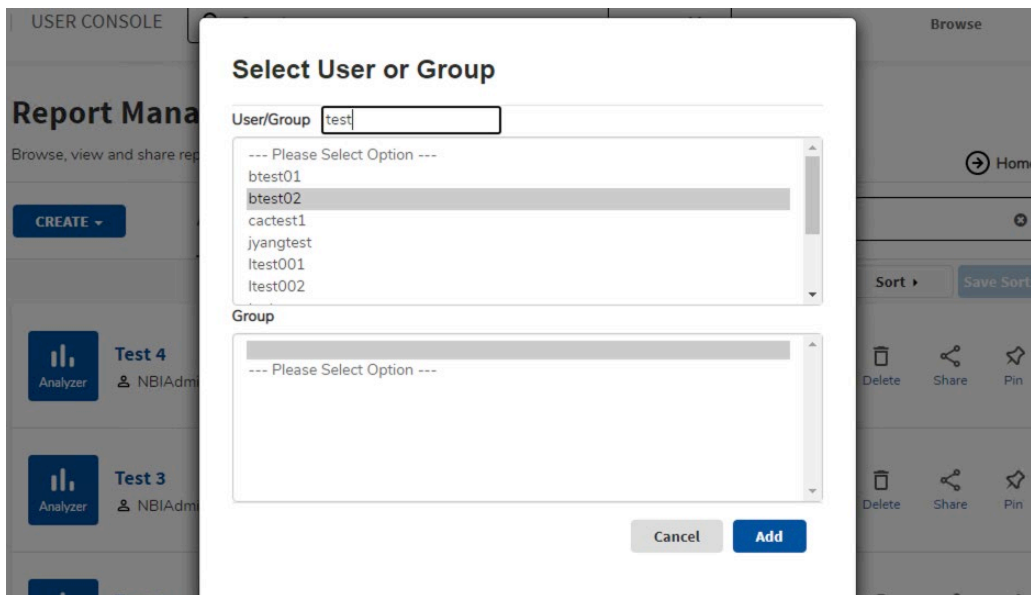
To share a folder (and all the reports in it):

1. Bring up the folder management interface.
2. Hover over the folder to be shared, click on the **Edit** (the middle) button.
3. Navigate to the **Share Reports** tab.



4. Choose the options:
 - Keep the folder **Private**; or
 - Share the folder to **Public**, or
 - **Share** the folder to specific users onlySharing the folder to specific users will bring up the **Users and Groups** dialog
5. Check the box next to the user entry, specify the privilege whether the user can further **Execute**, **Modify**, **Delete** or **Share** the folder.

6. Click on the **Add** button to find more users in the organization. Use the search box to find the users quickly.



7. Click in the **Remove** button to remove sharing with the checked users
8. Click on the **Share** button to share the folder