

Data Platform 5.5.36

Folders Management for User Console Reports

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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.

	DNSOLE Q Searc	h
Report Ma	nagement	
Browse, view and sha	New Top Folder	
CREATE -	금 All Reports 중 Favorite Reports 중 Home Reports	Shared
	Folder_1	
II. Test 4	Folder_1_1_1 Folder_2	

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

FLEXERA USER CONSOLE	Q Search Create Folder	×
Report Ma Browse, view and sha	New Top Fold All Reports Favorite Rep Home Report Folder_1 Folder_1_1 Folder_1_1 Folder_1_1	Cancel Confirm

Creating a New Subfolder

To create a new subfolder, perform the following tasks.



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

	Q Search
Report Ma	nagement ~
Browse, view and sha	New Top Folder
CREATE -	Call Reports TarFavorite Reports Shared Folder 1 Shared
	■ Folder_1_1 ■ Folder_1_1
II. Test 3	Eolder 2 2 Add

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.

То	To rename an existing user-created folder:				
1.	. Hover over the folder to be renamed and click on the Edit (the middle) button.				
		Q Search			

Report Management 🗸

Browse, view and sha	New Top Folder	
CREATE -	☐ All Reports - ⓓ Favorite Reports - ⓓ Home Reports ■ ➡ Folder_1	ed
	■ = Folder_1_1 = = Folder_1_1	
I, Test 3	Folder_2	

- 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.

FLEXEFA USER CONSOLE	Q Search
Report Ma	nagement ~
Browse, view and sha	New Top Folder
CREATE -	All Reports Favorite Reports Home Reports Folder_1 Folder_1 Folder_1 Folder_2 remove

- 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.

.E Q Search				Browse 🗸 Reports 🗸
	Pin Report To			
port Management	🔿 Favorites 🔿 Home 💿 Folder			
vse, view and share reports	Folder Name:			Home
CREATE - All Private	Select Folder		er Name	0
_		Cancel Pin		Sort > Save Sorts
Test 3 Analyzer & NBIAdministrator & Priv	vate 0 2021-01-26T15:10:52.313			Image: Constraint of the second secon

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.

OLE	Q Search	localhost says Do you want to unpin this report'Test 3'?	3		Browse 🗸 Reports *
Folder_2 ~			OK Cancel		
browse, view and share	e reports				Home
CREATE -	All Private Public	Shared		Filter Name	٥
					Sort > Save Sorts
Analyzer Test 3	dministrator 👌 Private 🔇	2021-01-26T15:10:52.313		🗍 Delete Share	Image: Signal of the second secon

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)

Folder_1 ~

wse, view and share reports			Home
CREATE - All Private Public Shared	Filter Name		0
_		Sor	rt) Save Sorts
I Test 1 Analyzer ▲ NBIAdministrator ④ Private ③ 2021-01-26T14:07:33.67	Delete Shar		 Report Name Create Date User
Analyzer & NBIAdministrator 🔂 Private O 2021-01-26T14:07:33.67			

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.

Folder_1 ~

rowse, view and share reports	•	Home
CREATE - All Private Public Shared	Filter Name	0
_	Sort • Sa	ve Sort
Analyzer Test 2 ▲ NBIAdministrator 合 Private ③ 2021-01-26T14:08:10.543	☐ < ☆ ☆ ☆ Delete Share Pin unpin	→ Move
Analyzer ▲ NBIAdministrator ♠ Private ♥ 2021-01-26T15:10:52.313	☐ <ੳ ☆ ☆ Delete Share Pin unpin	→] Move
Test 1 Analyzer ▲ NBIAdministrator ▲ Private ③ 2021-01-26T14:07:33.67	🛅 < 🖍 💸 Delete Share Pin unpin	→] Move

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.

Pin Report To		Browse	
Home Repor Browse, view and share rep CREATE -		•) Home
L III. Ansivzer ▲ NBIAdministrator	Sort >	Sav Sav	re Sorts <table-cell> Pin</table-cell>
Image: Image	Delete	% Share	S Pin

- 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.

USER CONSOLE									Browse	
	Ed	it Fol	der_2							
Report Mana	Ei	dt Folder	Share Reports							
Browse, view and share rep									Ð) Home
CREATE +		rivate C s and Gro	Public Share							0
		Туре	Name	Execute	Modify	Delete	Share	Sort	Sa	
		User	NBIAdministrator							
ال Test 4 Analyzer & NBIAdmi								Delete	% Share	☆ Pin
Test 3 Analyzer & NBIAdmi	A	dd	Remove					Delete	Share	☆ Pin
					Ca	ncel	Share	-	p	^

- 4. Choose the options:
 - Keep the folder **Private**; or
 - Share the folder to **Public**, or
 - Share the folder to specific users only

Sharing 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.

USER CONSOLE	USER CONSOLE						
Report Mana	Select User or Group						
Browse, view and share rep	Please Select Option btest01 btest02			9) Home		
CREATE -	cactest1 jyangtest Itest001 Itest002		Sort •	Sav	C e Sorts		
	Group	•					
ال، Test 4 Analyzer & NBIAdmi	Please Select Option	A	Delete	Share	☆ Pin		
III Test 3 Analyzer & NBIAdmi			Delete	لام Share	S Pin		
		Cancel Add					

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

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Flexera

300 Park Blvd., Suite 500 Itasca, IL 60143

USA

Itasca (Global Headquarters):

+1 800-374-4353

United Kingdom (Europe, Middle East Headquarters)

+44 370-871-1111

+44 870-873-6300

Japan (Asia, Pacific Headquarters)

+81 3-4360-8291

Australia

+61 3 9895 2000

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