

**flexera**

# 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

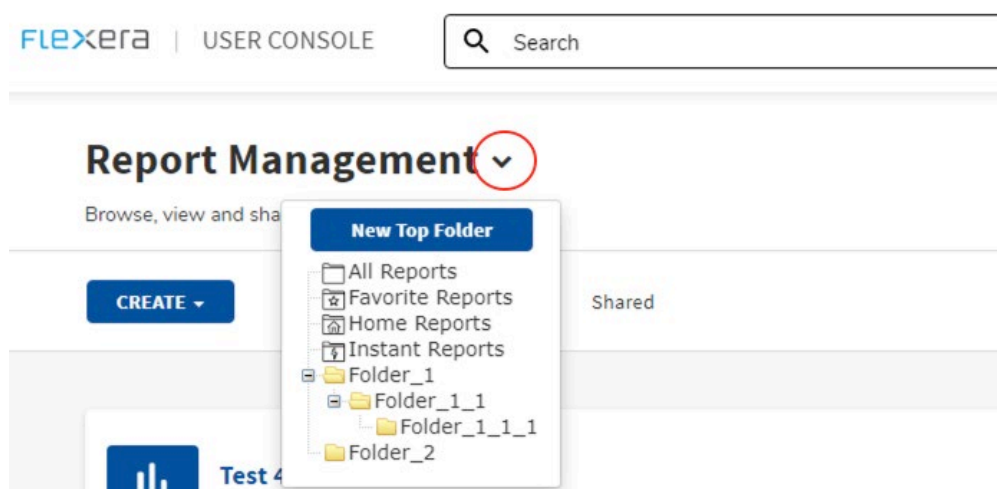
To open the folder management interface, perform the following steps.

*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.



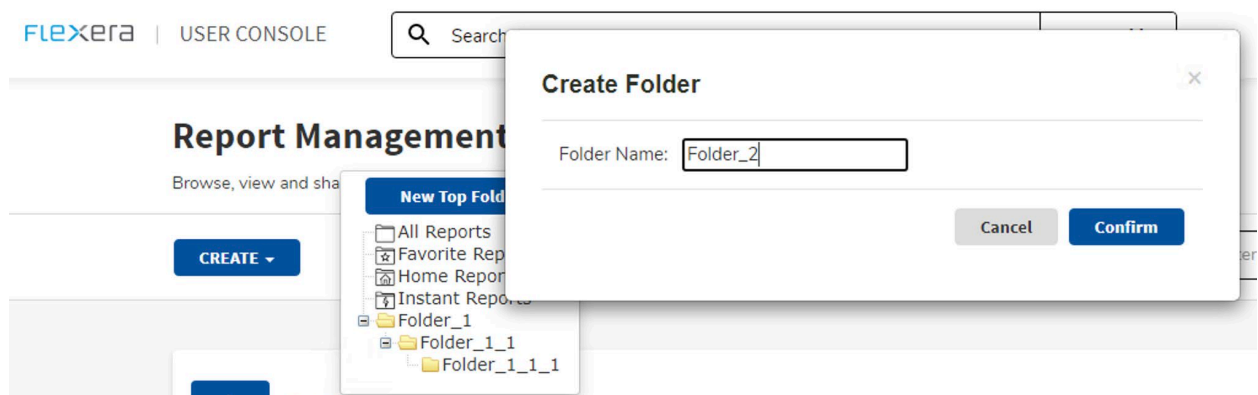
# Creating a New Folder

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

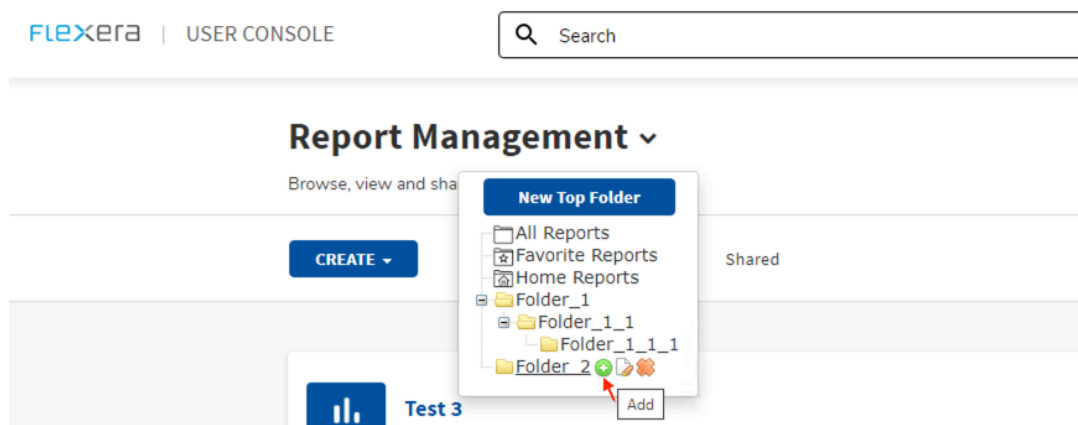


# Creating a New Subfolder

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.

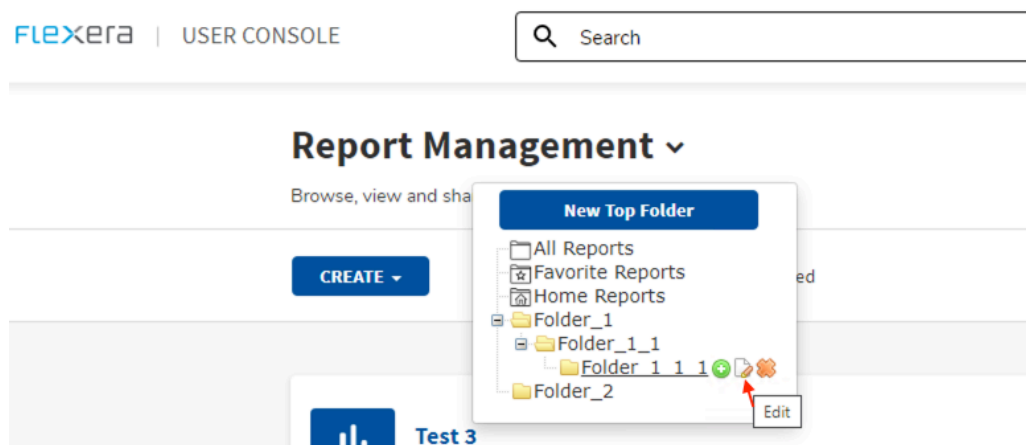
More sub-folders can be created at the same level or at the lower level of hierarchy (i.e., sub-sub-folder) by the same method.

## 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.



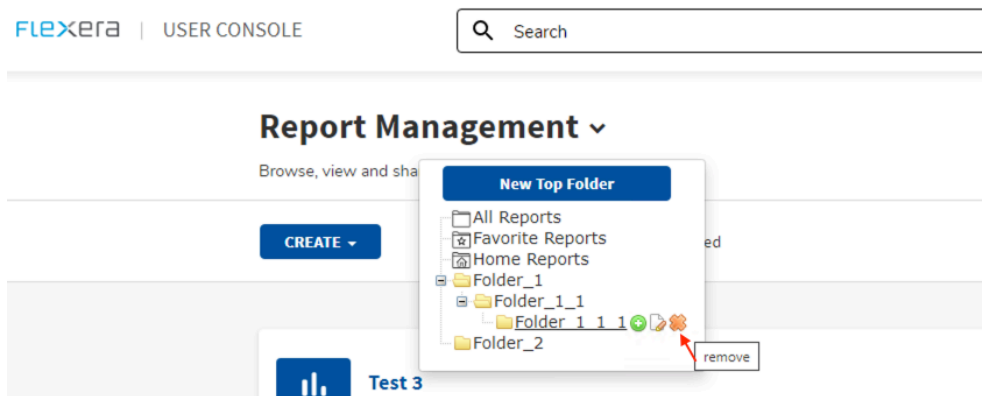
2. Edit the folder name.
3. Click on **Confirm**.

# 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.



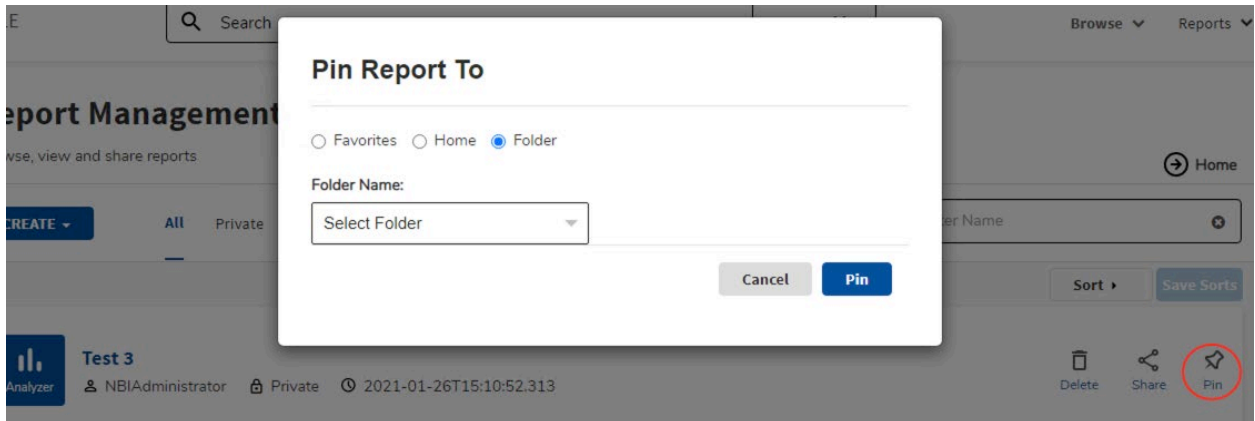
2. In the next dialog, check the box to delete reports inside the folder as well. Otherwise, leave the box unchecked to leave to preserve the reports (accessible in **All Reports** folder or any other folders already containing them).
3. Click on **Confirm**.

# 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

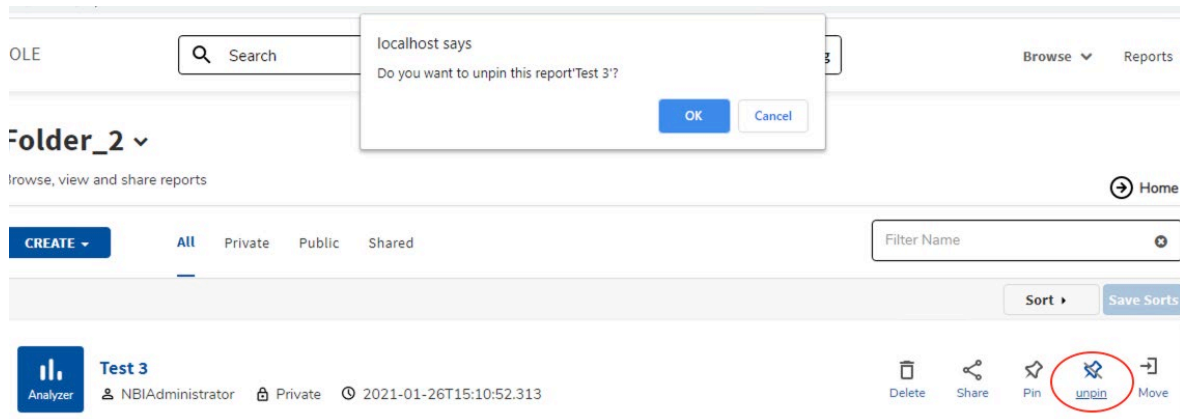


# Removing a Report from a Folder

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](#)



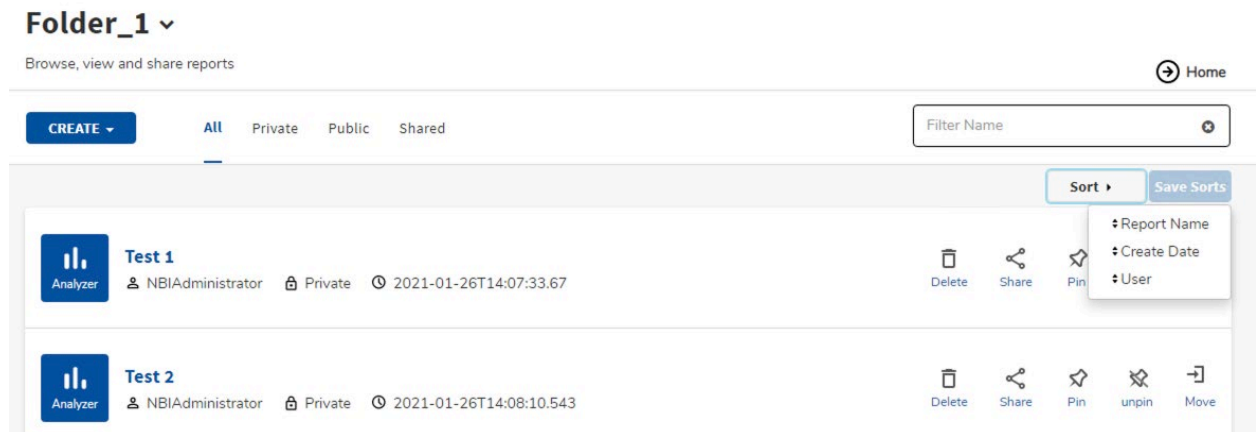
## Sorting Reports Using Standard Sorting Options

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)

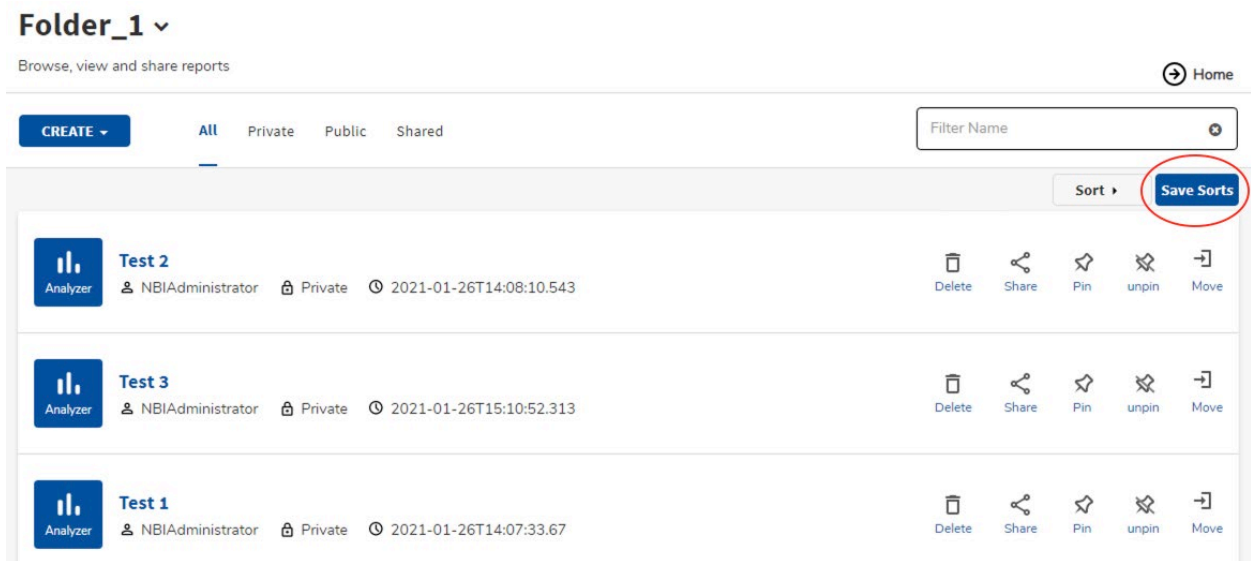


## Sorting Reports Manually and Saving the Sort

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.

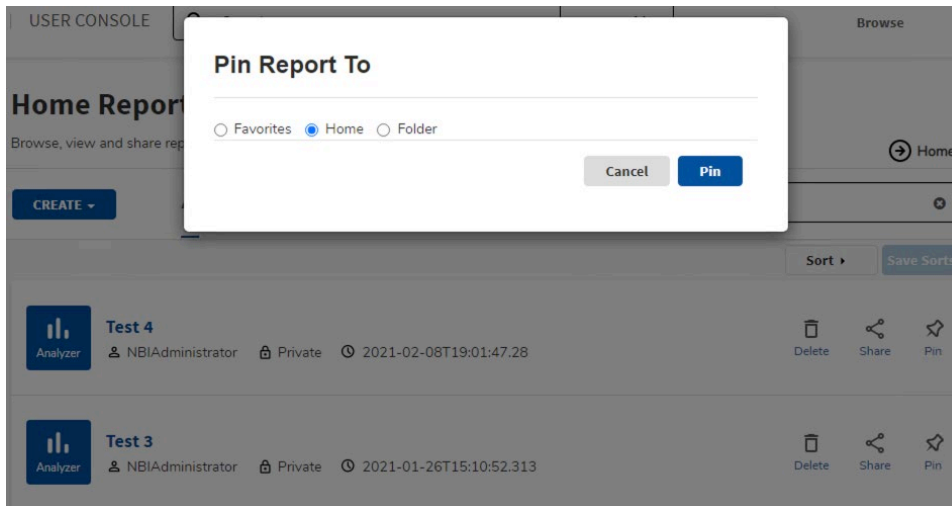
**NOTE:** Doing additional sorting by any of the three standard sorting options will temporarily change the sorting accordingly. The saved (manual) sorting will be preserved anytime the folder is shown.

# 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.



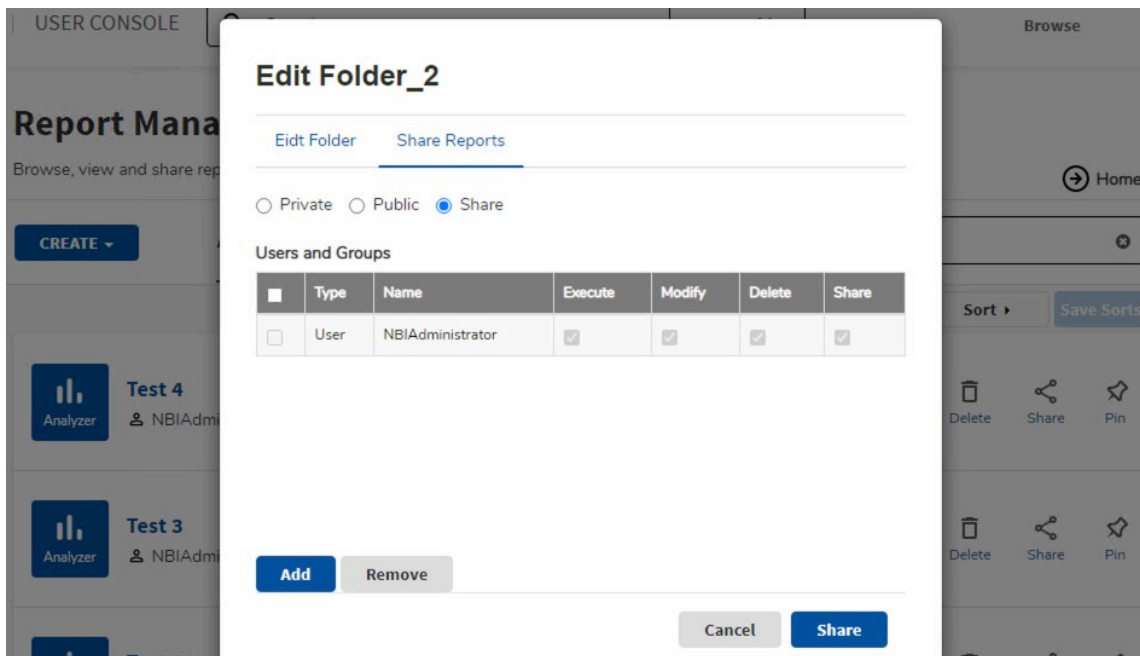
2. Up to 4 (four) reports can be pinned to the **Home** page.
3. The order by which the reports show up can be changed using either one of the standard sorting options (by **Report Name**, by **Create Date**, by **User**) or manual sorting.

# Sharing a Folder of Reports

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

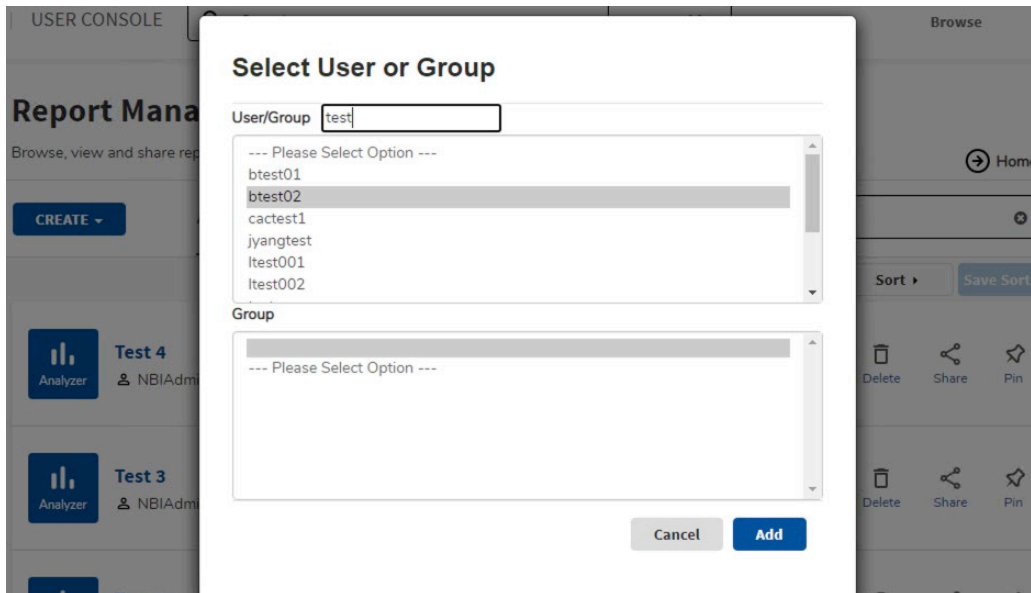
*To share a folder (and all the reports in it):*

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.

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



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

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