Comments and Tasks

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Overview

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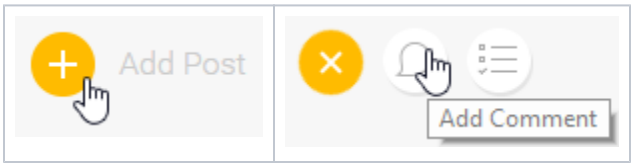
Yellowfin collaboration functions allow users to work together in a variety of ways, encouraging decision making and discussions related to content and business data. Comments and Tasks are available on content pages (Reports, Dashboard Tabs, and Storyboards), Discussion Streams, and Timelines. This section covers collaboration functions available on Discussion Streams and Timelines. For the collaborative functions on content pages, refer to the Activity Stream page.

Comments

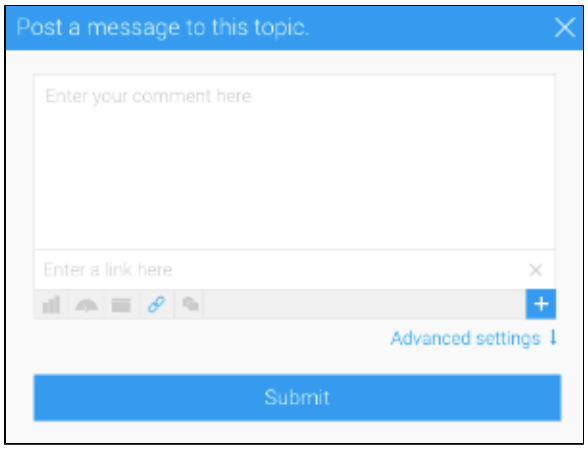
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In order to create a comment in discussion streams, and user timelines, follow these steps:

1. Click on the **Add Comment** option.

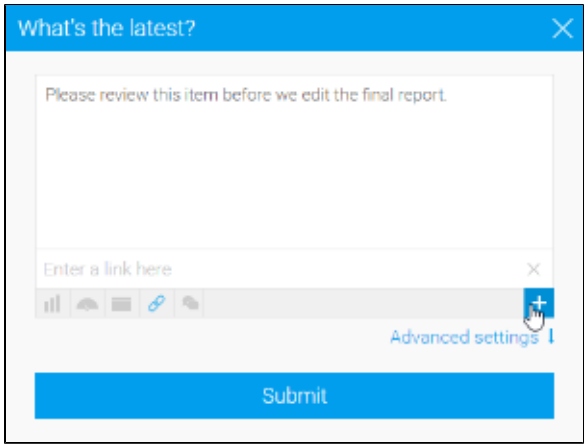


2. Enter the body text of your comment.



3. Add any attachments that may be required.

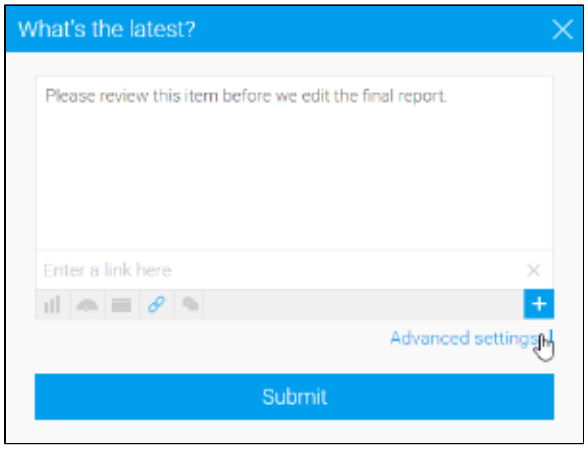
> *See **Attachments** for more information*

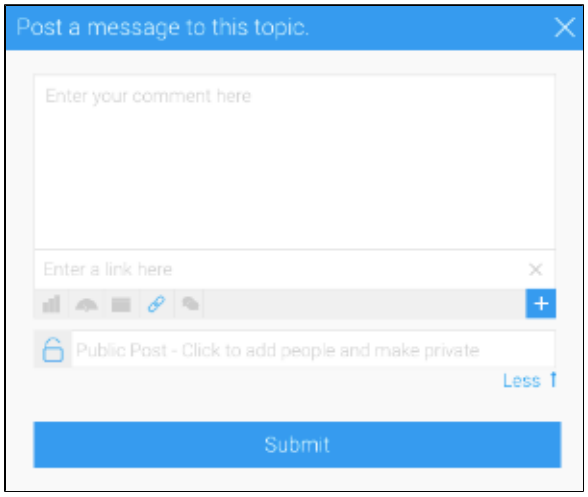


4. Open the **Advanced Settings** if they are required.

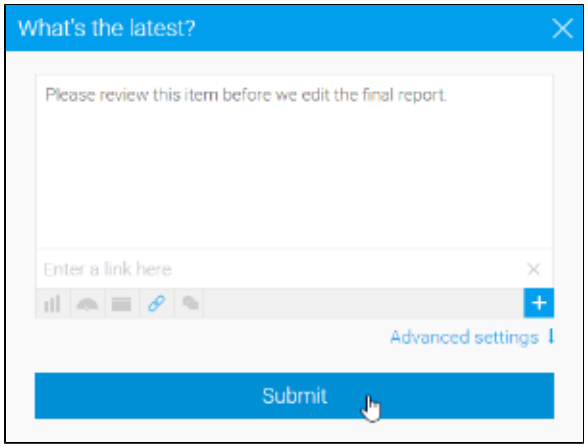
From here you can adjust:

- **Security** - this allows you to adjust if it's a **P ublic** post (meaning that it will rely on the content or stream security it belongs to), or **Private** post (allowing you to secure to specific users and/or groups).





5. Click **Submit** to save your comment.

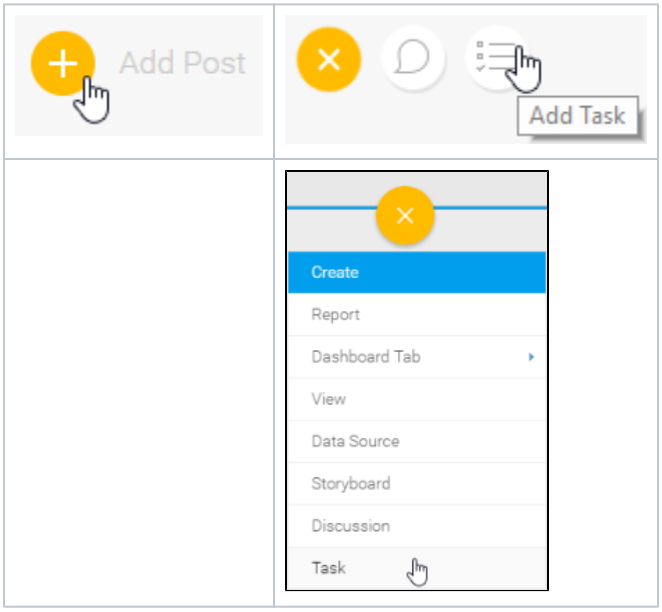


Tasks

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Tasks can be created and assigned to users for a variety of functions, covering simple 'to do' notes all the way through to data quality checks and content change requests. In order to create a task, follow these steps:

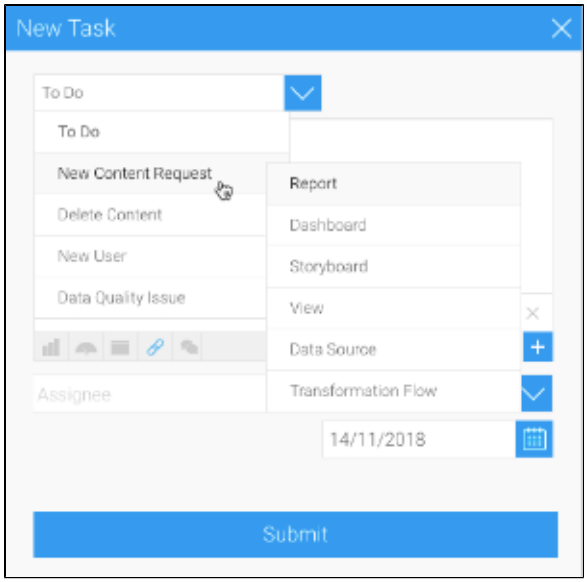
1. Click on the **Add Task** option.



2. Select the type of Task from the following:

- To Do
- New Content Request
  - Report
  - Dashboard
  - Storyboard
  - View
  - Data Source
  - Data Transformation
- Delete Content
- New User

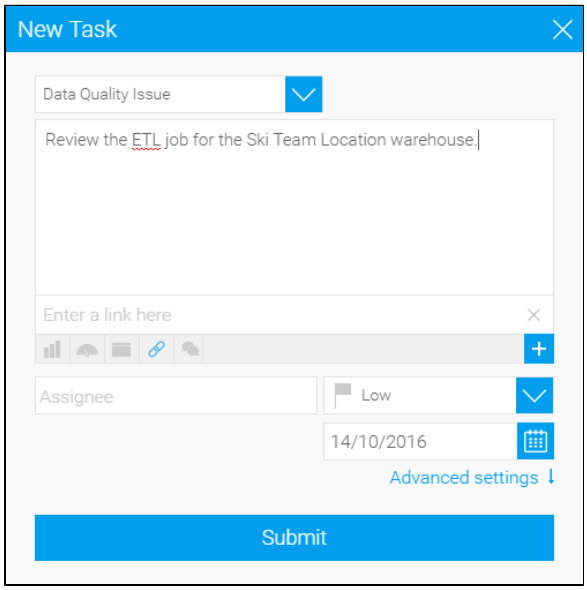
- Data Quality Issue



3. Enter the body text of your task request.

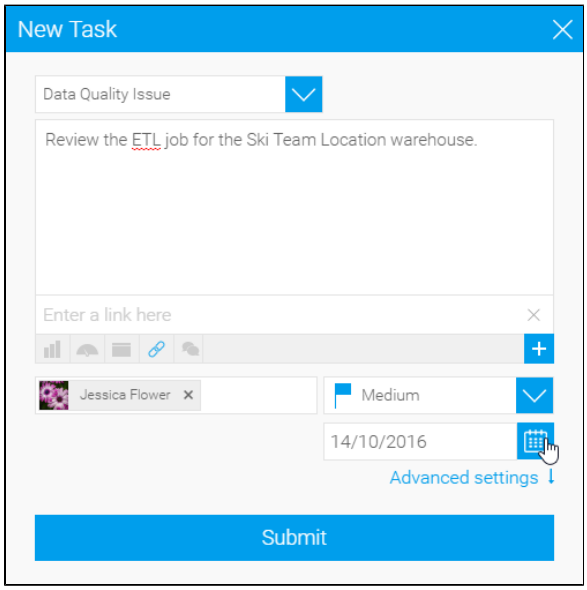
4. Add any attachments that may be required.

> *See Attachments for more information*



5. **Assign** the task. This involves:

- **Assignee** - which user should complete the task.
- **Priority** - how urgent the task is:
  - Low
  - Medium
  - High
- **Due Date** - when the deadline for completion of the task is.



6. Open the **Advanced Settings** if they are required.

From here you can adjust:

- **Security** - this allows you to adjust if it's a **P ublic** task(meaning that it will rely on the content or stream security it belongs to), or **Private** task (allowing you to secure to specific users and/or groups).

7. Click **Submit** to save your task.

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