ANALYTICS FOLDER SHARING

Summary

Fine-tune what users can do with folders that contain reports or dashboards.

Share Reports and Dashboards

Reports and dashboards are shared through folders. You share the folder, not the report or dashboard itself. To let others work with your report or dashboard, give them Viewer, Editor or Manager access to the folder where the report or dashboard is stored.

Note:

- Users can't share report and dashboard folders in Lightning Experience. All sharing permissions set on folders in Salesforce Classic are obeyed in Lightning Experience.
- This set of sharing documentation is for orgs with Enhanced Analytics Folder Sharing enabled. Enhanced Analytics Folder Sharing grants report and dashboard folders detailed access levels. If your org was created after the Summer '13 Salesforce release, you already have Enhanced Analytics Folder Sharing. If your org doesn't have Enhanced Analytics Folder Sharing enabled, refer to *Turn On Enhanced Sharing for Reports and Dashboards* in the Salesforce help.

Turn On Enhanced Sharing for Reports and Dashboards

When you enable analytics sharing, Salesforce converts your users' existing folder access levels to use new, more detailed access levels.

Note: If your organization was created after the Summer '13 Salesforce release, you already have analytics folder sharing. If your organization existed before the Summer '13 release, follow these steps to make folder sharing available to your users.

When analytics sharing is in effect, all users in the organization get Viewer access by default to report and dashboard folders that are shared with them. Users might have more access if they are Managers or Editors on a given folder, or if they have more administrative user permissions. Each user's access to folders under the new capability is based on the combination of folder access and user permissions they had before enhanced folder sharing was enabled.

1. From Setup, enter *`Folder Sharing`* in the `Quick Find` box, then select **Folder Sharing**.
2. Select **Enable access levels for sharing report and dashboard folders**.
3. Click **Report and Dashboard Folder Sharing**.

Important: If you go back to the old folder sharing model, existing report and dashboard folders go back to the state they were in before.

- If a folder existed before analytics folder sharing was enabled, its properties and sharing settings are rolled back to their previous state.
- If a folder was created while enhanced analytics folder sharing was in effect, it is hidden from the folder list and all its sharing settings are removed. Administrative user permissions are still in effect.

Share a Report or Dashboard Folder

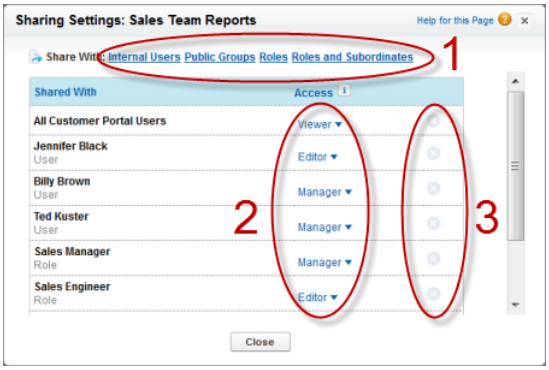
To enable others to use a report or a dashboard, share the folder it is in. Give each user, public group, or role the degree of access to the folder that makes sense for them.

Note: To give someone access to a folder, you must have either Manager access to that folder, the "Manage Reports in Public Folders" permission (for report folders), or the "Manage Dashboards in Public Folders" permission (for dashboard folders).

When you create a folder, you're its manager. Only you, and others with administrative permissions, can see it.

If a folder does not have Manager access, it is public, and users with the "View Reports in Public Folders" permission can view it. Depending on their object access, these users can also run the report.

(1) Share your folder by user, by user group, or by role. (2) Choose the access level you want each user, group, or role to have. (3) Stop sharing the folder with the user, group, or role.



Share a Report or Dashboard with an Individual User

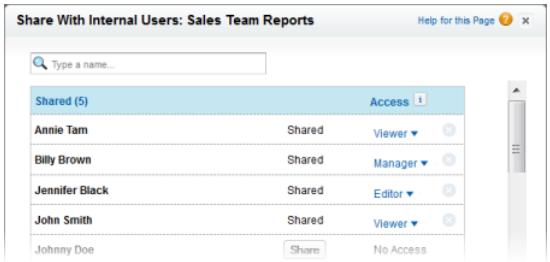
If you only have one or two people to share a report or dashboard folder with, give them access individually.

1. On the Reports tab, hover over a report folder in the left pane, click , and then select **Share**.
2. Select **Internal Users**.

   Note: Internal users don't include customer portal or partner portal users.

3. Find the user you want, click **Share**, and choose an access level.

   To search, just start entering a name.



4. Click **Done**, review your changes, and click **Close**.

Share a Report or Dashboard with a Group

If more than one or two people need access to an analytics folder, share the folder with a public group. That way you don't have to keep track of which individuals you've shared it with.

1. On the Reports tab, hover over a report folder in the left pane, click , and then select **Share**.
2. Select **Public Groups**.
3. Find the group you want, and click **Share**.

   To search, start typing a name.

4. Choose the sharing level you want to give this group.

   Note: Portal users can only have Viewer access to reports, and they can't use dashboards.

5. Click **Done**, review your changes, and click **Close**.

Share a Report or Dashboard by Role

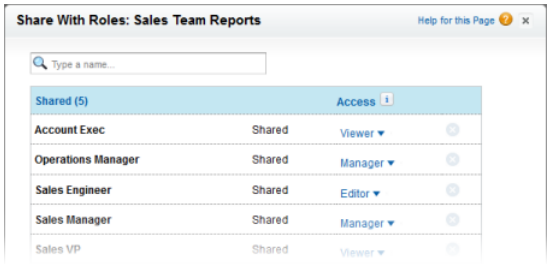
When you give people access to a report or dashboard folder based on their role, you can control who has access without having to keep track of users or groups.

You can give report or dashboard folder access to users in a role, or to those users plus users in roles subordinate to that role.

For example, suppose the *VP of Sales* role and its subordinates have Viewer access to a dashboard folder, while the role itself (VP of Sales) has Manager access to the folder. This means a user in the VP of Sales role has greater control than someone with a role that's lower in the role hierarchy. If the VP of Sales leaves the company, whoever next assumes that role will be able to manage dashboards in the folder.

1. On the Reports tab, hover over a report folder in the left pane, click , and then select **Share**.
2. Select **Roles** or **Roles and Subordinates**.
   - Select **Roles** if you want to give access to all users who have that role.
   - Select **Roles and Subordinates** if you want to give access to those users plus everyone with a role below them in the role hierarchy.
3. Find the role you want, click **Share**, and choose a level of access.

   To search, enter a name.



4. Click **Done**, review your changes, and click **Close**.

Access Levels for Report and Dashboard Folders

Each user, group, or role can have its own level of access to a report and dashboard folder. Viewers can see the data; Editors can determine what data is shown; and Managers can control access.

Tip: If you're not ready to share a report or dashboard, keep it in a personal folder that only you can access. The "My Personal Custom Reports" folder and the "My Personal Dashboards" folder are already set up for you. Create more if you need them. When you create a folder, it is accessible only to you and users with administrative permissions until you share it.

User Permissions for Sharing Reports and Dashboards

Each level of access to a report or dashboard folder consists of a combination of specific user permissions. As an administrator, you can further fine-tune users' access to dashboards and reports by assigning or removing one or more permissions.

When analytics folder sharing is enabled, all users get Viewer access to report and dashboard folders except users with higher administrative permissions. To give users broader privileges, assign Editor or Manager folder access and give report and dashboard user permissions as needed.

User Permission	Description
`Create and Customize Dashboards`	Create, edit, and delete dashboards in **My Personal Dashboards** folder. Create dashboards and save into any shared folder if sharing rights allow.
`Create and Customize Reports`	Create, edit, and delete reports in **My Personal Custom Reports** folder. Create reports and save into any shared folder if sharing rights allow.
`Create Dashboard Folders`	Create dashboard folders and manage them if sharing rights allow.
`Create Report Folders`	Create report folders and manage them if sharing rights allow.
`Edit My Dashboards`	Edit, move, save, and delete dashboards you created in shared folders.
`Edit My Reports`	Edit, move, save, and delete reports you created in shared folders.

`Manage Dashboards in Public Folders`	Create, edit, delete dashboards[1], and manage their sharing in all public dashboard folders, which does not include others' personal folders. This permission allows users to edit and share dashboards in all folders, including hidden folders. They also get these permissions: • `Create and Customize Dashboards` • `Create Dashboard Folders` • `Edit My Dashboards` • `View Dashboards in Public Folders` ([1] To edit a dynamic dashboard, users also need `Manage Dynamic Dashboards` and `View My Team's Dashboards`.)
`Manage Reports in Public Folders`	Create, edit, delete reports, and manage their sharing in all public report folders, which does not include others' personal folders. This permission allows users to edit and share reports in all folders, including hidden folders. They also get these permissions: • `Create and Customize Reports` • `Create Report Folders` • `Edit My Reports` • `View Reports in Public Folders`
`View Dashboards in Public Folders`	View dashboards in public dashboard folders, which does not include others' personal folders.
`View Reports in Public Folders`	View reports in public report folders, which does not include others' personal folders.