



ANALYTICS FOLDER SHARING

Summary

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

Report and Dashboard Folders

Use report and dashboard folders to organize your reports and dashboards. To share reports and dashboards, you share the folder, not the report or dashboard itself.

By default, all orgs created after the Summer '13 Salesforce release use enhanced folder sharing. If your org is using Salesforce Classic and doesn't have Enhanced Analytics Folder Sharing enabled, see *Turn On Enhanced Sharing for Reports and Dashboards* in the Salesforce Help.

Enhanced folder sharing offers these advantages in comparison to legacy folder sharing.

- Sharing at the user, group, or role level, or a combination of these
- Sharing with individual users
- Fine-grained access levels for each folder share
- Same permission structure used for both reports and dashboards

Enhanced folder sharing supports these access levels.

- Viewer—View folders and their content, run reports, and refresh dashboards.
- Editor—All viewer access, plus the ability to add content to a folder, edit all the content in a folder, and delete content from a folder.
- Manager—All viewer and editor access, plus the ability to rename and delete folders and edit, delete, or remove shares.

If you have orgs created before the Summer '13 release and don't want to reassign permissions for the legacy reports and dashboards, you can continue to use legacy folder sharing in Salesforce Classic. With legacy folder sharing:

- Salesforce determines a folder's accessibility and visibility to a user as read only or read write.
- Read only—When a folder is visible to a user, the user can see and run the reports stored in that folder.
- Read and write—Users with read-write permission on folder can save reports to the folder. When saving, the users see only the report folders for which they have write permission.

Notes about folder sharing:

- To open a report or dashboard, you need:
 - Access to the folder in which the report or dashboard is saved
 - The necessary user permission

For example, to run a report you need access to the folder in which it's saved and the "Run Reports" user permission.


- The concept of shared/not shared folders is different from the concept of public and private folders:
 - The reports or dashboards in a private folder are always invisible to everyone except the person who created the folder.
 - The reports or dashboards in any folder that is not private are visible to everyone who has permission to view the reports or dashboards.

- The following folder names are different in Salesforce Classic and Lightning Experience, but the folders are the same.

Salesforce Classic	Lightning Experience
Unfiled Public Reports	Public Reports
Unfiled Public Dashboards	Public Dashboards
My Personal Custom Reports	Private Reports
My Personal Dashboards	Private Dashboards


Turn On Enhanced Folder Sharing for Reports and Dashboards

When you enable folder 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 enhanced folder sharing. If your organization existed before the Summer '13 release, follow these steps to make folder sharing available to your users.


When enhanced 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 **Save**.

-  **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 enhanced folder sharing was enabled, its properties and sharing settings are rolled back to their previous state.
 - If a folder was created while enhanced 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 in Salesforce Classic

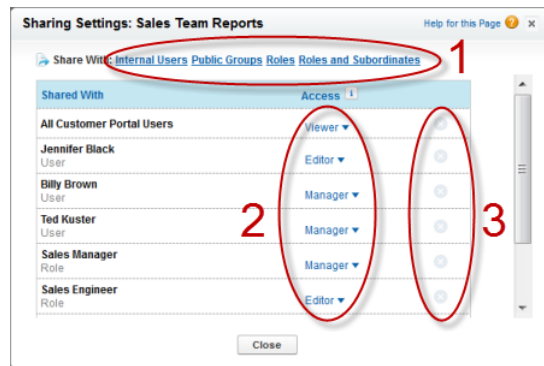
Enhanced folder sharing is the default option for all orgs created after the Summer '13 Salesforce release. If you have orgs created before Summer '13 and don't want to reassign permissions for the legacy reports and dashboards, you can use legacy folder sharing in Salesforce Classic.

 **Note:** To give 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's 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.


You can share a report or dashboard folder with up to 25 users, groups, or roles at one time. You can share a folder with up to 100 users, groups, or roles using the folder sharing REST API.



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

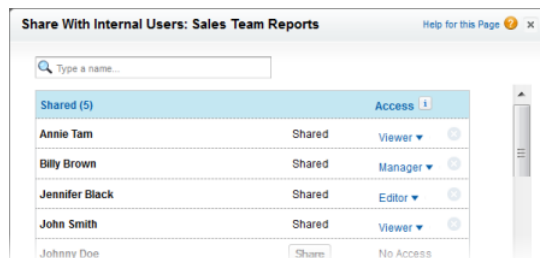
Share a Report or Dashboard Folder with an Individual User in Salesforce Classic

Enhanced folder sharing is the default option for all orgs created after the Summer '13 Salesforce release. If you have orgs created before Summer '13 and don't want to reassign permissions for the legacy reports and dashboards, you can use legacy folder sharing in Salesforce Classic.

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 doesn't include customer portal or partner portal users.


3. Find the user you want, click **Share**, and choose an access level.
To search, start typing a name.

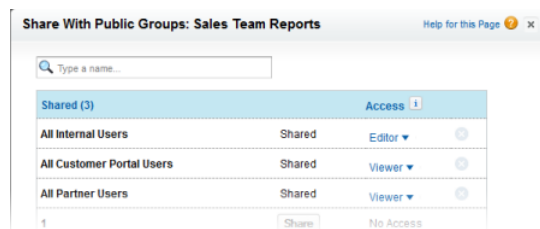


4. Click **Done**, review your changes, and click **Close**.


Share a Report or Dashboard with a Group in Salesforce Classic

Enhanced folder sharing is the default option for all orgs created after the Summer '13 Salesforce release. If you have orgs created before Summer '13 and don't want to reassign permissions for the legacy reports and dashboards, you can use legacy folder sharing in Salesforce Classic.

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 in Salesforce Classic

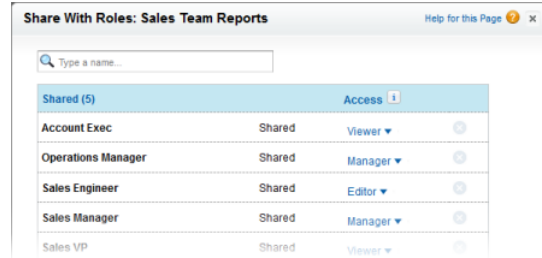
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You can give report or dashboard folder access to users in a role, or to those users plus users in roles subordinate to that role.

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. In this case, 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 can 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**.
 - To give access to all users who have the role, select **Roles**.
 - To give access to those users plus everyone with a role below them in the role hierarchy, select **Roles and Subordinates**.
3. Find the role you want, click **Share**, and choose a level of access.


To search, start typing 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. 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 folders if you need them. When you create a folder, it is accessible only to you and to 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 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 the My Personal Dashboards folder. Create dashboards and save to any shared folder if sharing rights allow.
Create and Customize Reports	Create, edit, and delete reports in the My Personal Custom Reports folder. Create reports and save to 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 that you created in shared folders.

Edit My Reports	Edit, move, save, and delete reports that you created in shared folders.
Manage Dashboards in Public Folders	<p>Create, edit, and delete dashboards,¹ and manage their sharing in all public dashboard folders. This permission does not extend to others' personal folders. This permission allows users to edit and share dashboards in all folders, including hidden folders. They also get these permissions:</p> <ul style="list-style-type: none"> • Create and Customize Dashboards • Create Dashboard Folders • Edit My Dashboards • View Dashboards in Public Folders <p>(¹ To edit a dynamic dashboard, users also need Manage Dynamic Dashboards and View My Team's Dashboards permissions.)</p>
Manage Reports in Public Folders	<p>Create, edit, and delete reports, and manage their sharing in all public report folders. This permission does not extend to others' personal folders. This permission allows users to edit and share reports in all folders, including hidden folders. They also get these permissions:</p> <ul style="list-style-type: none"> • 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. This permission does not extend to others' personal folders.
View Reports in Public Folders	View reports in public report folders. This permission does not extend to others' personal folders.