



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.

▶ Watch a video: [Manage Report and Dashboard Folders \(Lightning Experience\)](#)

For several releases we've been phasing out Legacy Folder Sharing in favor of Enhanced Folder Sharing, which has an improved UI and more fine-grained access control. Legacy Folder Sharing is currently available only for orgs created prior to Summer '13. It is due for retirement in Summer '20. For instructions on transitioning to Enhanced Folder Sharing, see [Transition Your Org to Enhanced Folder Sharing](#) on page 2.

Notes about folder sharing:

- When you save a report or dashboard, it goes by default into your private reports or dashboards folder. To save to a public/public/custom folder, select the folder in the Save dialog box.
- 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.
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Salesforce Classic	Lightning Experience
Unfiled Public Reports	Public Reports
My Personal Custom Reports	Private Reports
My Personal Dashboards	Private Dashboards

Transition Your Org to Enhanced Folder Sharing for 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.

What's Different in Enhanced Folder Sharing?

Enhanced folder sharing is different from legacy folder sharing in the way you define folders and how access to reports and dashboards is determined. And some of the permissions for report and dashboard folders change in enhanced folder sharing.

Creating a Folder

It's simpler to create a folder in enhanced folder sharing.

Legacy Folder Sharing	Enhanced Folder Sharing
<p>Enhanced folder sharing</p> <p>When creating a folder, you specify:</p> <ul style="list-style-type: none"> • Folder label: name • Public folder access: read-only or read-write • Folder visibility: accessible by all users, hidden from all users, or accessible to specified groups and roles. 	<p>When creating a folder, you specify only the name. The folder doesn't carry any special properties for visibility or type of access.</p>

Accessing the Reports and Dashboards in a Folder

Three access levels in enhanced folder sharing determine how you can interact with the reports and dashboards in a shared folder.

Legacy Folder Sharing	Enhanced Folder Sharing
<p>When creating a folder, you specify the folder as read-only or read-write and assign it one of these access types:</p> <ul style="list-style-type: none"> • Accessible by all users • Hidden from all users • Accessible only to specified public groups, roles, and roles and subordinates 	<p>When sharing a folder, you specify View, Edit, or Manage access for the selected users, groups, or roles, or a combination.</p> <p>Depending on user permissions, some users can do more than is indicated by the access level that they're granted when a folder is shared. See Permissions for Reports and Dashboards on page 3.</p> <p>The following table lists the capabilities for each access level.</p>

Folder Access Capabilities in Enhanced Folder Sharing

	View	Edit	Manage
View reports or dashboards in the folder	✓	✓	✓
See who has what level of access to the folder	✓	✓	✓
Save a report or dashboard in the folder		✓	✓
Rename a report or dashboard in the folder		✓	✓
Delete a report or dashboard from the folder		✓	✓
Share a folder			✓
Change the folder's name			✓
Change the folder's sharing settings			✓
Delete a folder			✓

Permissions for Reports and Dashboards

Some user permissions are different in enhanced folder sharing. When enhanced folder sharing is enabled, Salesforce updates the permissions as the following table shows. For a full list of permissions for reports and dashboards, see [User Permissions for Sharing Reports and Dashboards](#) on page 9.

Legacy Folder Sharing	Enhanced Folder Sharing	What you can do with this permission in enhanced folder sharing
Manage Public Reports AND View All Data	Manage Reports In Public Folders	<p>Perform all Manage actions in Folder Access Capabilities in Enhanced Folder Sharing on page 2 for all folders except others' private folders.</p> <p>Manage Reports in Public Folders also includes these permissions:</p> <ul style="list-style-type: none"> • Create and Customize Reports • Create Report Folders • Edit My Reports • View Reports in Public Folders
Manage Public Reports	Create Report Folder AND Edit My Reports	<p>Create report folders. Perform all Manage actions in Folder Access Capabilities in Enhanced Folder Sharing on page 2 for all folders that you create.</p> <p>Edit, move, save, and delete reports that you create. Save your</p>

reports to a shared folder, even if you only have View access to the folder.

Manage Dashboards AND View All Data	Manage Dashboards In Public Folders	<p>Perform all Manage actions in Folder Access Capabilities in Enhanced Folder Sharing on page 2 for all folders except others' private folders.</p> <p>Manage Dashboards in Public Folders also includes these permissions:</p> <ul style="list-style-type: none"> • Create and Customize Dashboards • Create Dashboards Folders • Edit My Dashboards • View Dashboards in Public Folders
Manage Dashboards	Edit My Dashboards AND Create and Customize Dashboard	Edit, move, save, and delete dashboards that you create. Save your dashboards to a shared folder, even if you only have View access to the folder.
View All Data	View Reports In Public Folders AND View Dashboards In Public Folders	View the reports and dashboards in all folders except the private folders of other users.

Special Folders

The following folders are equivalent in legacy folder sharing and enhanced folder sharing. Only the names are different. Users who have access to the legacy folders continue to have the same access after the upgrade to enhanced folder sharing.

Folder Name in Legacy Folder Sharing	Folder Name in Enhanced Folder Sharing
Unified Public Reports	Public Reports
My Personal Custom Reports	Private Reports
My Personal Dashboards	Private Dashboards
Company Dashboards	Company Dashboards

What Happens with Enhanced Folder Sharing Enabled?

When enhanced folder sharing is enabled,

- All users get View access to the report and dashboard folders that are shared with them.

- Users with Manage Reports in Public Folders or Manage Dashboards in Public Folders can manage all dashboard or report folders (except for others' private folders) even if no folder is explicitly shared with them or they have only View access.
- Users who don't get Edit My Reports or Edit My Dashboards permission as part of the upgrade can no longer edit the reports and dashboards in folders that are shared with them. To restore edit access, a company admin who has Manage Reports in Public Folders or Manage Dashboards in Public Folders permission can assign Manage access to users for particular folders. Those users can then assign View, Edit, or Manage access to those folders to other users.

Changes in Folder Access

The following table summarizes the changes in folder access when enhanced folder sharing is enabled.

For a legacy folder that has read-only or read-write public access and is...	The following occurs after upgrading to enhanced folder sharing
Accessible by all users	The folder is shared with the public group All Internal Users. The group has View access to the folder. If the Customer Portal is enabled in your org, then All Customer Portal Users and All Partner Portal Users also get View access to the folder.
Hidden from all users	The folder isn't shared with anyone. Users with View Reports in Public Folders or View Dashboards in Public Folders permission can view the folder contents. Users with Manage Reports in Public Folders or Manage Dashboards in Public Folders permission can edit and manage the folder.
Accessible only to specified Public Groups, Roles, and Roles and Subordinates	The folder is shared with each group and role. The groups and roles receive View access.

Examples

These examples show how transitioning to enhanced folder sharing works.

Restoring Edit Access to a Report or Dashboard

In legacy folder sharing, Sally has the user permissions Manage Dashboards and View All Data, but Tim has only View All Data. Sally and Tim build a dashboard that's saved in a Read-Write folder. After turning on enhanced folder sharing, Sally automatically receives the user permissions Manage Dashboards in Public Folders and Create Dashboard Folders. Tim only receives the user permission View Dashboards in Public Folders. Sally can view and edit the dashboard that she and Tim created, but Tim can only view it. Tim asks Sally for help. Because she has Manage access to the folder, she's able to grant Edit access to him. The two can now continue to collaborate on the dashboard.

Smoothing the Transition to Enhanced Folder Sharing

In legacy folder sharing, members of the Business Development group have read-write access to the team's shared New Business folders. Kala, the company admin, knows that access will change to View when enhanced folder sharing is enabled. She asks Lee, the tech lead for the Business Development group, to identify the shared folders that could be affected. When enhanced folder sharing is enabled, she assigns Manage access to those folders to Lee. Lee is now able to assign Edit access to the folders to the full group or to individual users.

Uninterrupted Edit Access

Tara has the user permission Manage Dashboards in legacy folder sharing. She creates and saves a dashboard in a read-write folder. As part of the upgrade to enhanced folder sharing, Tara gets the user permission Edit My Dashboards. She's still able to edit her dashboard in the folder even though she has only View access. She can also save any new dashboards that she creates in the folder. But she can't edit anyone else's dashboards that are saved in the folder.

Enable Enhanced Folder Sharing

Here's how to turn on enhanced folder sharing.

Important: You can't revert to legacy folder sharing after making the change. So start by turning enhanced folder sharing on in a sandbox or developer edition. To ensure that report and dashboard folders have the appropriate sharing settings, review your org's permissions in the sandbox before converting to enhanced folder sharing in your production orgs.

1. From Setup, enter **Folder Sharing** in the Quick Find box.
2. Select **Folder Sharing**.
3. Select **Enable access levels for sharing report and dashboard folders**.
4. Click **Save**.

Share a Report or Dashboard Folder in Salesforce Classic

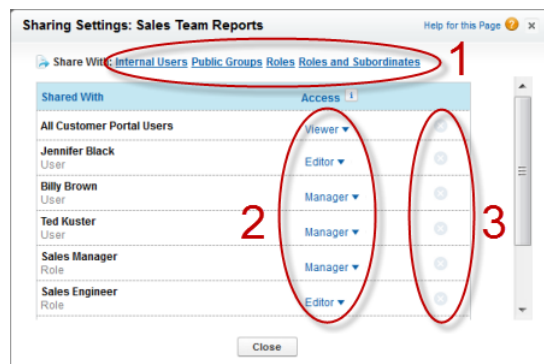
Enhanced folder sharing is the default option for all orgs created after the Summer '13 Salesforce release. If you have orgs created before Summer '13 and don't want to reassign permissions for the legacy reports and dashboards, you can use legacy folder sharing in Salesforce Classic.

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

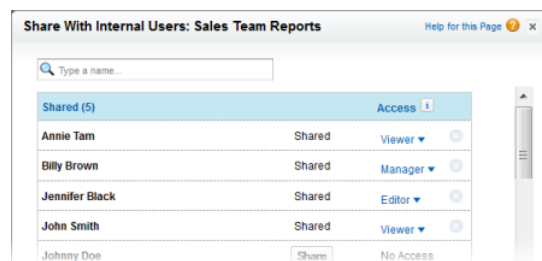


Share your folder by user, by user group, role, or by territory (1). Choose the access level you want each user, group, role, or territory to have (2). Stop sharing the folder with the user, group, role, or territory (3).

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

Enhanced folder sharing is the default option for all orgs created beginning with the Summer '13 Salesforce release. Legacy folder sharing, as described in this topic, is currently supported only for orgs created prior to the Summer '13 release. It is due for retirement in Summer '20. At that time all orgs will be converted to Enhanced Folder Sharing.


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 beginning with the Summer '13 Salesforce release. Legacy folder sharing, as described in this topic, is currently supported only for orgs created prior to the Summer '13 release. It is due for retirement in Summer '20. At that time all orgs will be converted to Enhanced Folder Sharing.

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.



- 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.


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

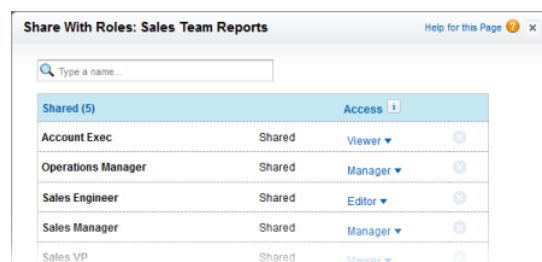
Share a Report or Dashboard by Role in Salesforce Classic

Enhanced folder sharing is the default option for all orgs created beginning with the Summer '13 Salesforce release. Legacy folder sharing, as described in this topic, is currently supported only for orgs created prior to the Summer '13 release. It is due for retirement in Summer '20. At that time all orgs will be converted to Enhanced Folder Sharing.

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.

- On the Reports tab, hover over a report folder in the left pane, click , and then select **Share**.
- 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**.
- Find the role you want, click **Share**, and choose a level of access. To search, start typing a name.



- 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 enhanced 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	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: <ul style="list-style-type: none"> • 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 permissions.)

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	<p>View dashboards in public dashboard folders. This permission does not extend to others' personal folders.</p>
View Reports in Public Folders	<p>View reports in public report folders. This permission does not extend to others' personal folders.</p>
