Introducing Personal Folders for ESO Insights
This week, ESO has released a new feature into Insights for organizing Dashboards that you own in Insights. You can now flexibly organize your own Dashboards in hierarchical folder system. By combining the use of folders and search, it is quicker and more convenient to locate the Dashboards you own in Insights.

Getting Started
If you are an Insights Designer, there is nothing you need to do to make Personal Folders available. The button below will immediately be visible and usable to you the next time you login to Insights.


Note: Only users with a Designer license in Insights will see the "Personal" tab. Personal Folders can be used only for Dashboards that you own in Insights; and since only Designers can own Dashboards, this functionality is not available for Insights Viewers.

Tips
1. The first time you click on the Personal button, you will see all the Dashboards that you own at the "root" of the folder system, and there will be no folders (yet). If you look on the main Insights landing page, and filter the list to "Created By Me", you will see that this list is identical to what you see inside of the Personal tab.
2. When you create a folder no other users will see your folders.
3. There is no change in functionality for when other users want to find and open a Dashboard you have shared with them, even if you have moved that Dashboard into a folder. Those users will still be able to find the Dashboard you have shared by using the "Shared With Me" filter on their own Insights landing page.
4. To create your first folder, use the "Add Folder" button on the upper right of the screen while inside of the Personal tab:
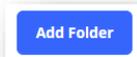

5. There are two ways you can place a Dashboard into a folder:
   a. Now, when you click "Add Dashboard", there is a new "Folder" dialog which allows you pick a folder into which your new Dashboard will be placed when you create it, or
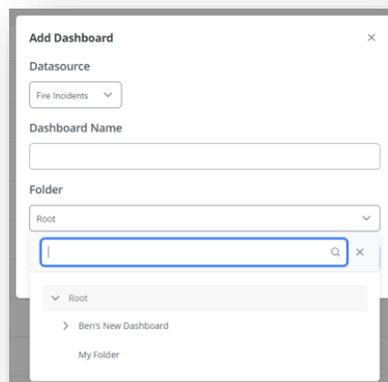
b. When browsing items on the Personal tab, the "Actions" menu contains a "Move" option. This option can be used for moving both Dashboards and Folders.
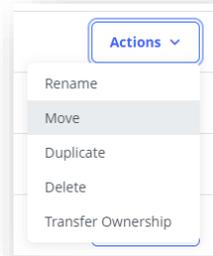

6. As you add folders and subfolders, you can use the "breadcrumb" feature on the top-left of your screen. This gives you a hierarchical display of your current location inside of the folders. You can click on the items in breadcrumbs to navigate back into a parent folder or into the root of your folders. In the example below, the user has navigated to a folder called "My Subfolder", which is a child folder of "My Folder". And "My Folder" is in the root of the user's Personal folders.
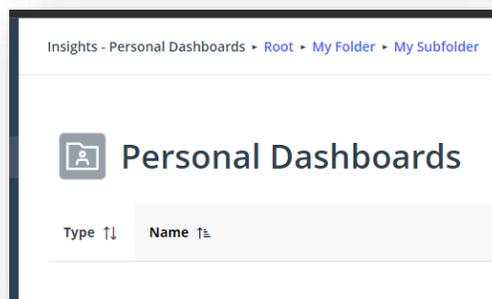
7. Use the "Search" bar on the upper right of the screen to find either Dashboards or Folders words contained in their title.
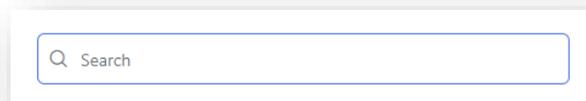
8. While in the Personal tab, Folders and Dashboards will be listed together, alphabetically. This means that by default, you will not see your subfolders at the top of your list of items. You can change this by clicking the "Type" column heading, and the list will now be sorted first with subfolders, and then Dashboards below.

9. You can easily differentiate items in your Personal tab by the icon associated with them. In the example below, you can see the folder icon next to the "My Folder" item. And you can see the Insights light bulb icon next to the Dashboard named "PatientTravel".
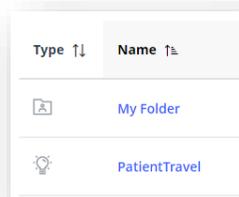
10. If you want to delete a folder, keep two important things in mind:
    a. When you delete a folder and it is not empty, the Dashboards and subfolders contained in the folder <u>will also be deleted</u>. Deleting will include warning and acknowledgement step (see below).
    b. Deletions of Folders and Dashboards are **permanent** and **cannot be undone**.

Delete Folder   ×

Are you sure you want to delete the folder?

All the contents of this folder will also be deleted. This action cannot be undone.

My Folder

× Cancel   ✓ Accept