Content Management

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Welcome back! In the previous lessons, we reviewed how to create, customize, and share Looks and dashboards.

In this module, we'll discuss how to manage and organize Looker content using folders and boards, so that your content is easy for the rest of your organization to find.

Agenda

We'll begin by discussing how you can use folders to organize your content in Looker, so that it is easily discoverable and accessible by others in your organization.
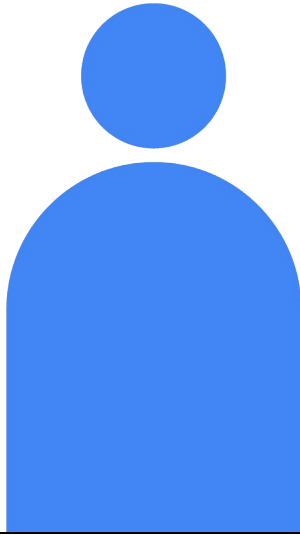
Agenda

01	Organizing Content with Folders
02	Creating and Browsing Boards

We'll conclude this module by focusing on how you can create boards to centralized content that lives in different folders in your organization's Looker instance.

We'll also review how you can browse existing boards within a Looker instance.

Let's get started!

Content management

| 01	Organizing Content with Folders
02	Creating and Browsing Boards

A common challenge that organizations face is that people struggle to find relevant content that already exists, so they make their own, causing duplicates and confusion.

To help you address this challenge, Looker provides many ways to organize content to make it more discoverable to others at your organization, including the ability to create and share folders within your Looker instance.

Folder navigation
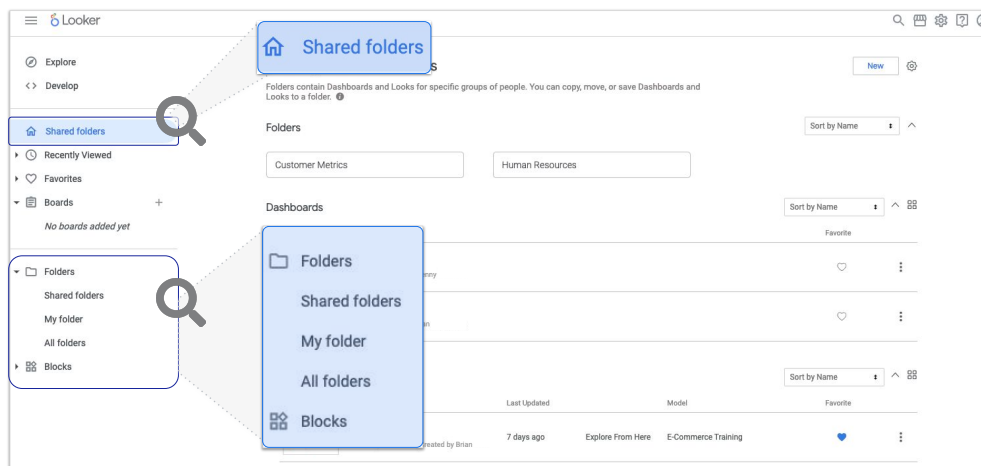
Examples are based on fictional data.

Google Cloud

To see the organizational structure of folders in your Looker instance, you can expand the **Folders** menu on the left-side navigation panel of the Looker UI.

Under **Folders**, you will typically see **Shared folders** (which contains all folders shared across an organization), **My folder** (which is your personal folder), and **All folders** (which shows all folders that you have access to in your Looker instance).
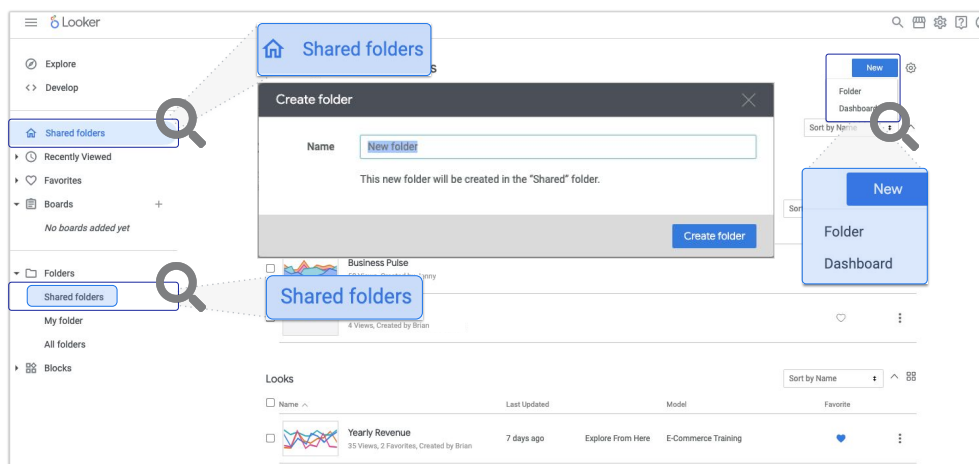
Shared folders
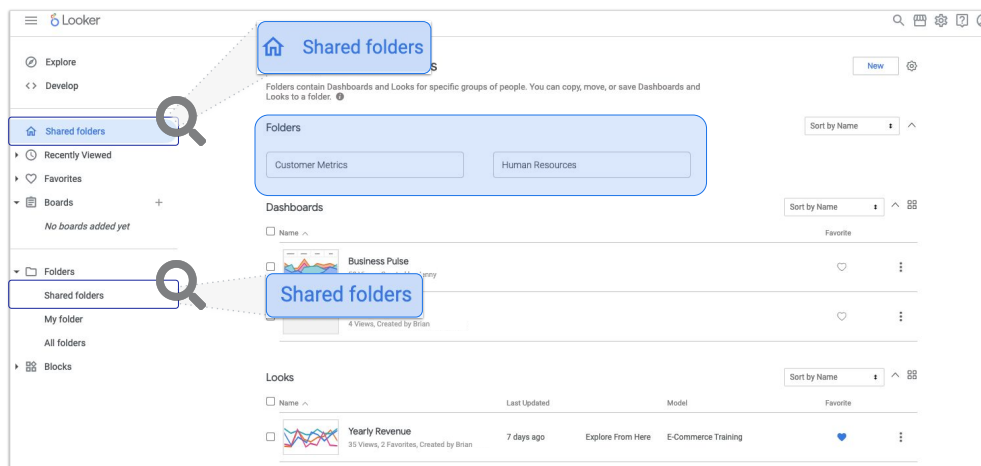
Examples are based on fictional data.

Now, depending on the settings configured by your Looker admin, it is common for the **Shared** folders page to be set as the home page for users (as shown in this example).

All shared folders that are accessible to you will appear at the top of the **Shared** folders page under the header called **Folders**.

Shared folders

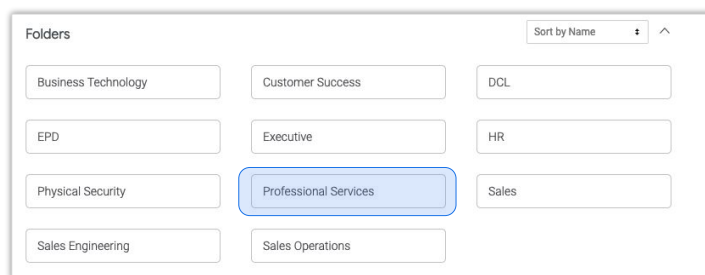Examples are based on fictional data.

Google Cloud

Of course, if you have been granted the permission to create new folders in your Looker instance, you can create a new shared folder by clicking on **New** button in the top right-hand corner next to the gear menu icon. A new window will open for you to name the new folder.

The new shared folder will be visible to all users within your Looker instance that can access items within **Shared folders**.

Shared folders

Store dashboards and Looks in a clear, intuitive folder structure for others to browse.

| Folders		Sort by Name ⌄
Business Technology	Customer Success	DCL
EPD	Executive	HR
Physical Security	Professional Services	Sales
Sales Engineering	Sales Operations	

Examples are based on fictional data.

Google Cloud

A best practice when creating a new shared folder is try to ensure the overall folder structure remains clear and intuitive.

In this example, there is a folder for each business team or unit, so if you need to know more about Professional Services' current projects, it is clear where you need to go.

Of course, the appropriate folder names and structure will differ by organization, but the objective of promoting discoverability and ease of use is key for all organizations.

Remember, the goal of the shared folder is to make the content stored there as easy to find and use as possible. Be sure to take a moment to review the existing Shared Folders structure as you decide when and where to create new folders and their appropriate names.
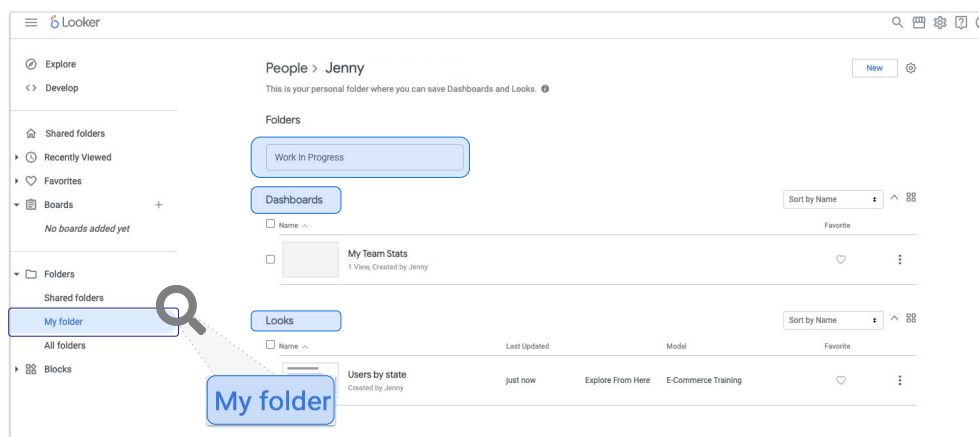
Your personal folder
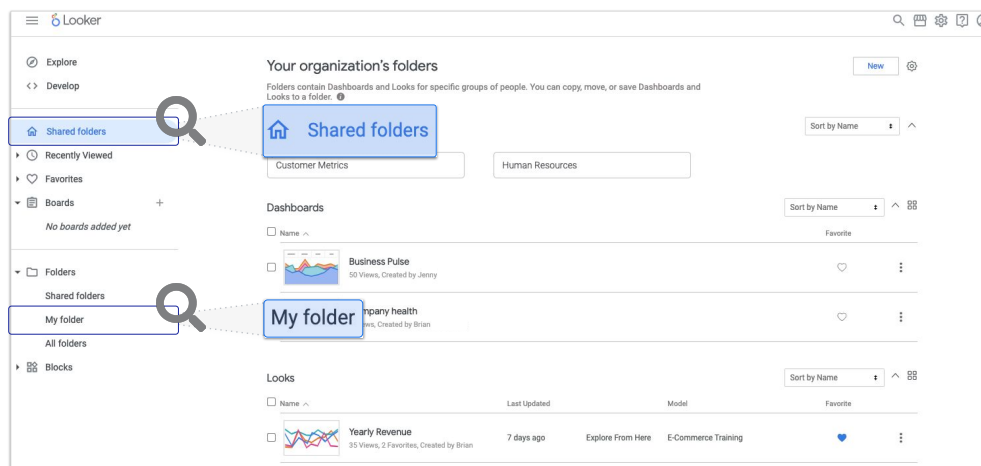
Examples are based on fictional data.

The next folder type under **Folders** is labeled **My folder**.

In Looker, all users are provided with their own personal folder as a scratch location to work with content.

Your personal folder

Google Cloud

Within **My folder**, you will see items that you have created and stored in your personal folder, including Looks and dashboards, as well as subfolders that you may have created.

While your personal folder is intended to be your own space for works in progress, and other items that you may not need to share, other users within a Looker instance can be granted access to your personal folder, if needed, by Looker administrators.
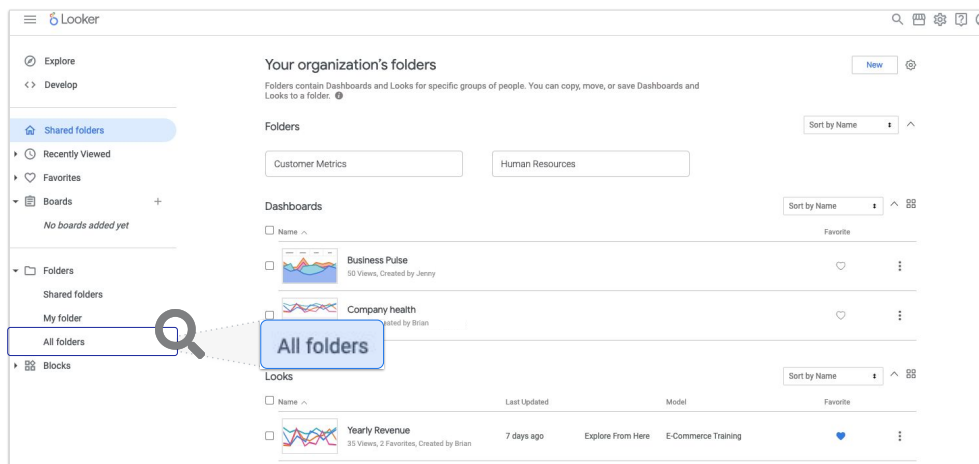
Your personal folder
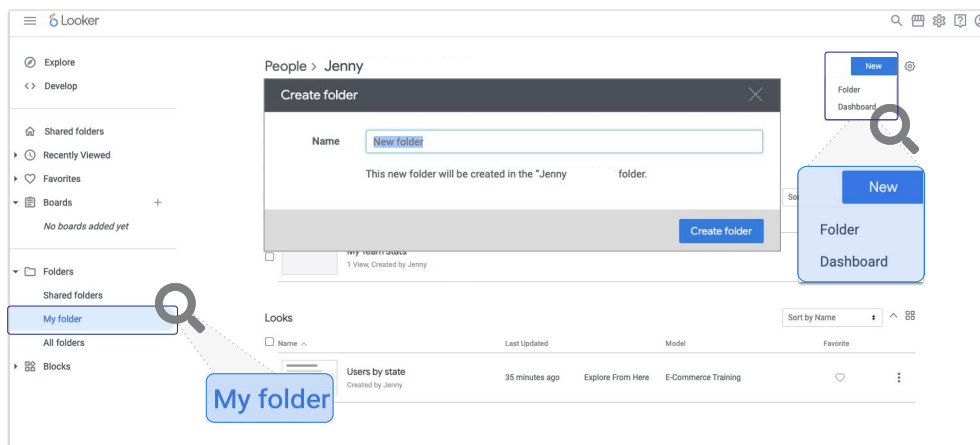
Examples are based on fictional data.

Google Cloud

Just like in the shared folders, you can click on **New** within **My folder** to create a new folder, if you have the permission to do so. Again, a new window will open for you to name the new folder.
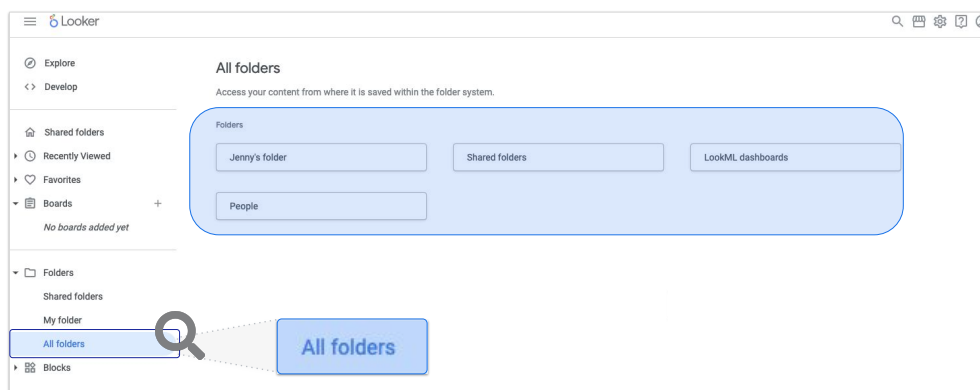
All folders

Examples are based on fictional data.

Google Cloud

Last, the option for **All folders** is useful to easily and quickly see all of the folders that you have access to within your Looker instance.
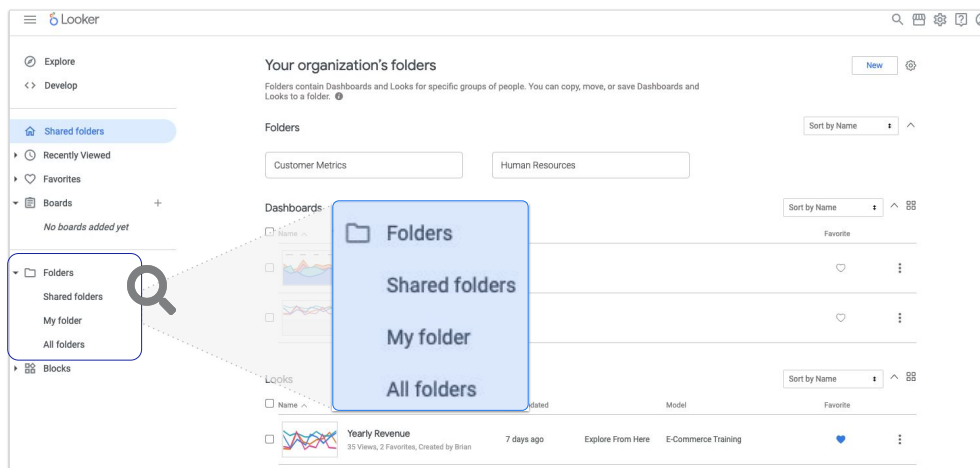
All folders

Examples are based on fictional data.

Google Cloud

The **All folders** page provides links to **Shared** folders as well as other users' personal folders within the **People** folder.

From here, you can navigate to any of these folders within your Looker organization, as long as you have been granted access to them.

Folders in Looker

Examples are based on fictional data.

Google Cloud

So, in summary, with these various folder options, Looker makes it easy for you to manage your content, so that it is readily discoverable and usable by others at your organization.

Have fun exploring the folders in your Looker instance!

Content management

| 01	Organizing Content with Folders
02	**Creating and Browsing Boards**

Google Cloud

Boards are a great way to centralize relevant content that lives in different folders within your organization's Looker instance.

The great thing about boards is that they simply link to a content item such as a Look or dashboard, which remains in its original location. So boards do not store the actual content, and the original content remains unaffected.

With boards, you also don't have to worry about permissions or data privacy because users still need access to the folder containing the item, in order to access that content from a board.

Boards

Use boards to centralize relevant content that lives in different folders, such as your favorite items.
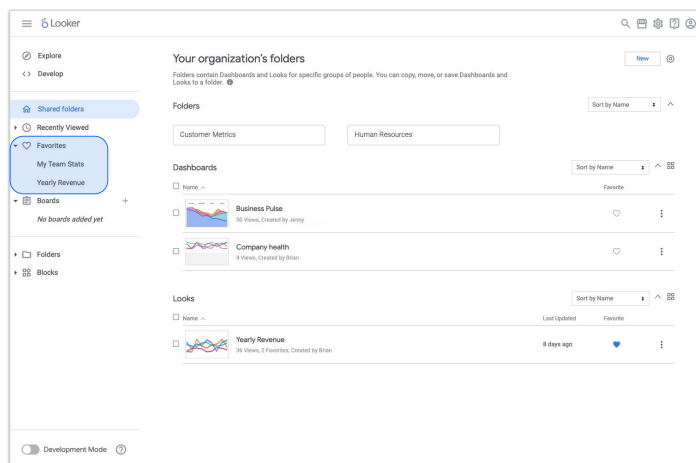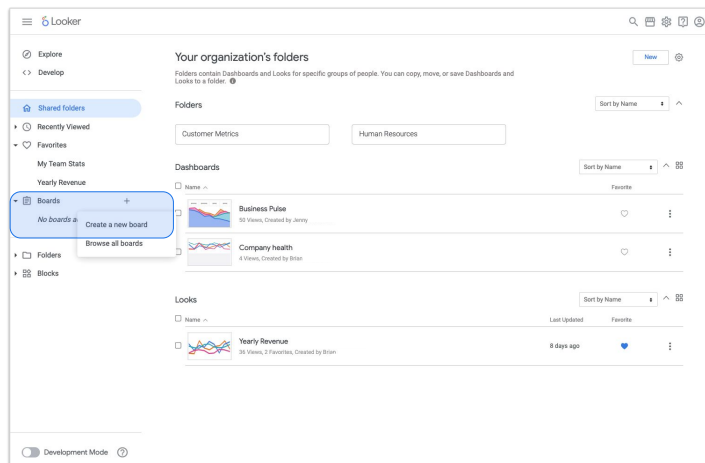

Examples are based on fictional data.

For example, the **Favorites** menu shows all your *own* bookmarks, but creating a board allows you to share those bookmarks with other users and teams.

Any Looks and dashboards added to the board will still live in their original folders; the board merely links to them and serves as a centralized page to easily find the content.

Create a new board

1

Click on the plus sign (+) next to boards in the left-side navigation panel, and select create a new board.

Examples are based on fictional data.

Google Cloud

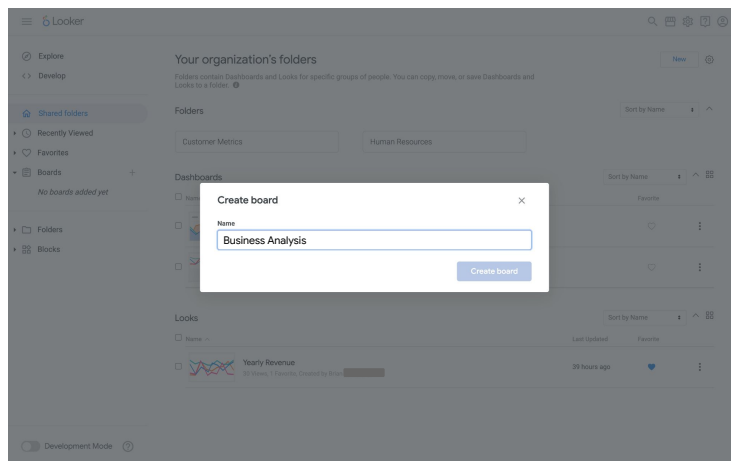In Looker, creating your own boards is very easy.

First, on the Looker home page, click on the plus sign (+) icon next to **Boards** in the left-side navigation panel, and select **Create a new board**.

Notice that you also see an option to browse all boards, which we will discuss later in this section.

Create a new board

2

Name your new board.

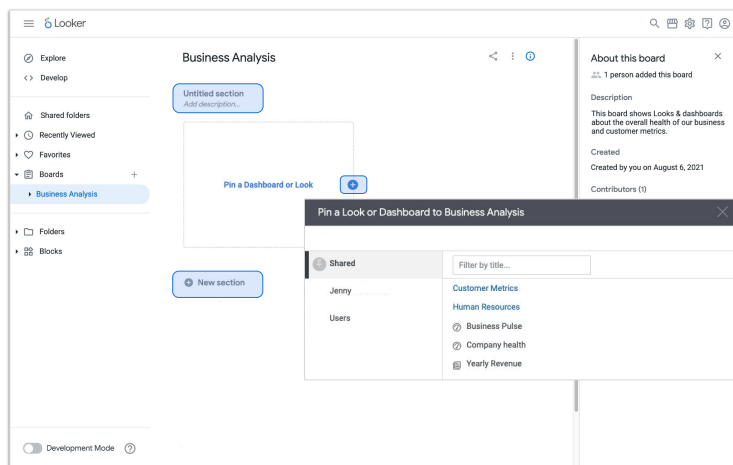Examples are based on fictional data.

Google Cloud

Next, give your new board a clear, descriptive name. For example, if you are creating a board to contain several business analysis related items, then an appropriate name could be Business Analysis.

Add content to your new board

3

Add new content by clicking on the blue plus (+) sign next to pin a dashboard or Look.

Examples are based on fictional data.

Google Cloud

Now, once you have created your new board, you can configure it as little or as much as you like.

You can add Looks and dashboards by clicking on the blue plus sign (+) next to Pin a dashboard or Look. A window will open for you to navigate and select the content that you want to add.

Looker also provides the ability to group content by adding new sections, and you can write a description for the entire board itself, as well as for each individual section, to aid others in using the board efficiently.

Customize your new board

4

Organize and curate your content any way you like: by team, by project, by data question, etc.
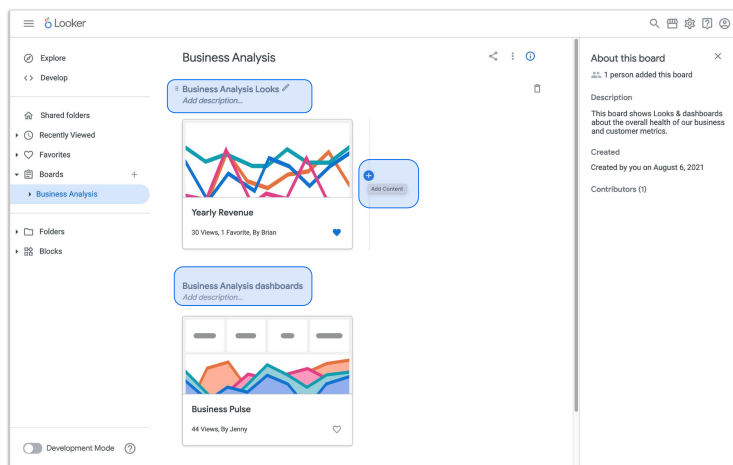
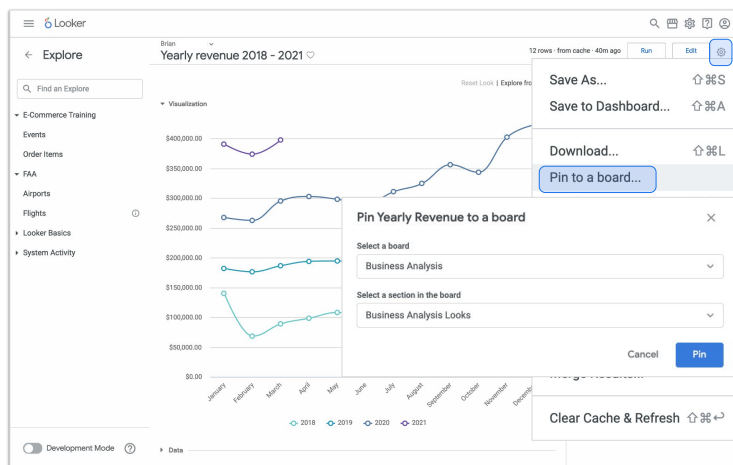Examples are based on fictional data.

Google Cloud

How you choose to group your content is entirely up to you: by team, by customer, by project, by product, by data question, and more.

Once you have created new sections, you can continue adding content to a section by hovering over the section and clicking on the blue plus sign (+) for **Add Content**.

Pin a Look to a board

Choose pin to a board from the gear menu at the top right corner.

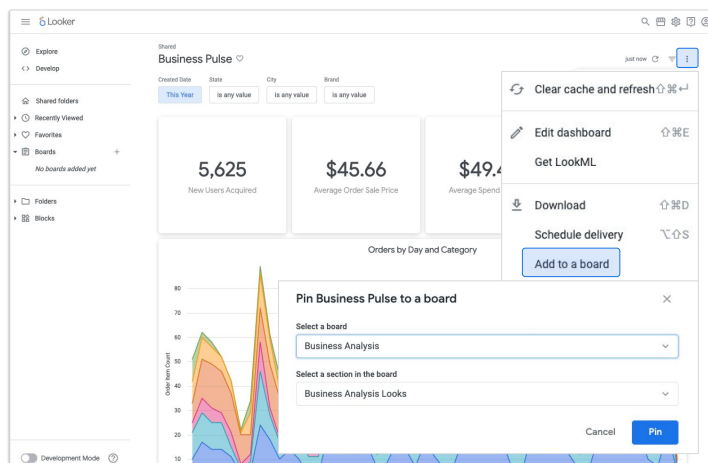Examples are based on fictional data.

Google Cloud

Looker also makes it easy to pin a Look or dashboard to a board when you are viewing the content in its original location.

For example, from a Look, click on the gear menu at the top right of the screen, and choose **Pin to a board**.

A window will open for you to choose on which board (and section) this new Look should be pinned for easier discovery and sharing.

Pin a dashboard to a board

Choose add to a board from the dashboard actions menu at the top right corner.

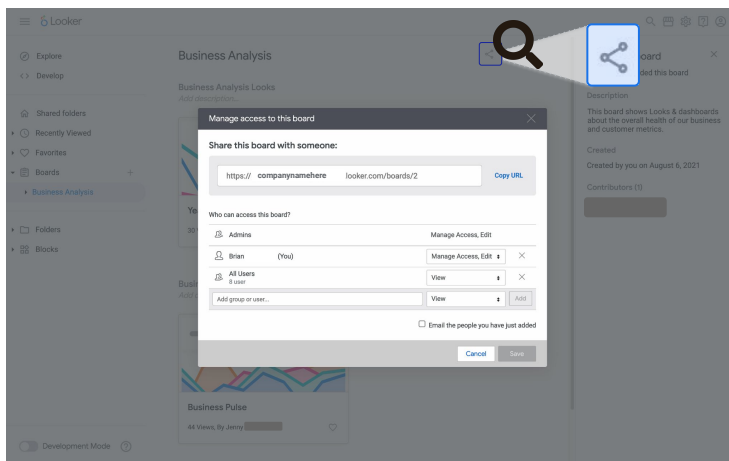
Examples are based on fictional data.

Google Cloud

You can follow a similar process to pin a dashboard when viewing it in its original location.

From a dashboard, click on the three vertical dots icon for **Dashboard Actions** at the top right of the page, and select **Add to a board**.

Manage access to your new board

Click on the share icon at the top right of the page.

Examples are based on fictional data.
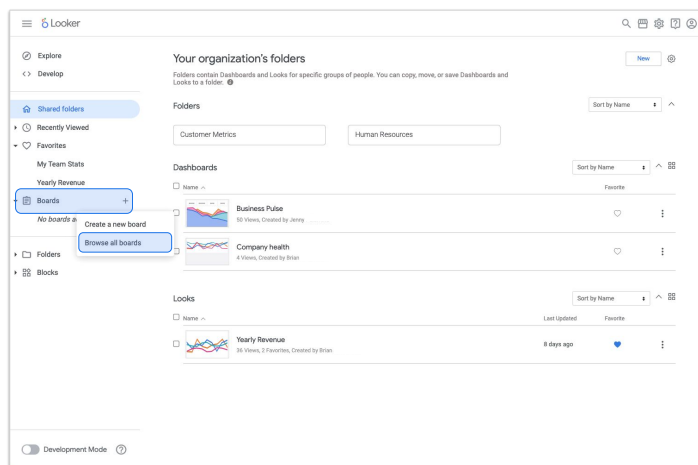
Google Cloud

Looker also makes it easy to explicitly share access to your board with others. Simply click on the share icon at the top right of the page, and select the users that you want to access the board as well as their level of access such as view or edit.

Remember, boards can be for your own benefit, for people you invite, or even for your entire team or organization.

Don't worry, though. Even if a user is given access to the board, they cannot view a particular content item on a board if they don't already have access to see it.

Browse all boards

Click on the plus sign (+) next to boards in the left-side navigation panel, and select browse all boards.

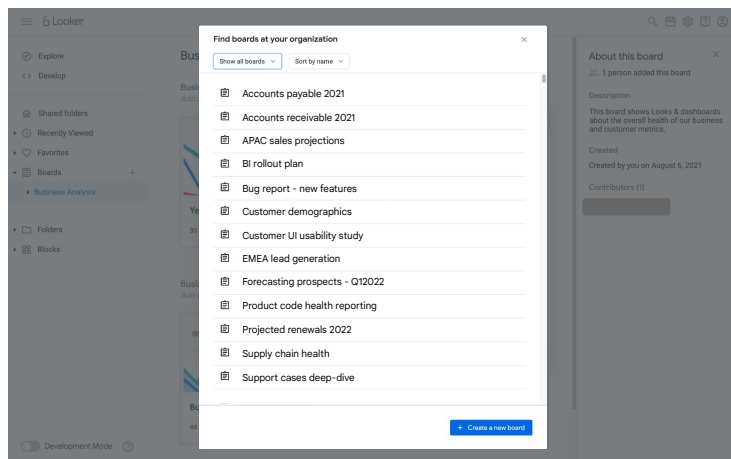Examples are based on fictional data.

Google Cloud

In addition to creating your own boards, you can also browse all boards that you have access to within your organization.

On the Looker home page, click on the plus sign (+) icon next to **Boards** in the left-side navigation panel, and select **Browse all boards**.

Browse all boards

You can search and peruse any board to which you've been granted access.

Examples are based on fictional data.

Google Cloud

In the browse window, you will be shown every board to which you have access within your organization's Looker instance.

Remember, though, while you may have access to a board, you may not have access to all or any of the content curated on that board.   To get access to the underlying content, you can reach out to your Looker administrator.

Boards in Looker
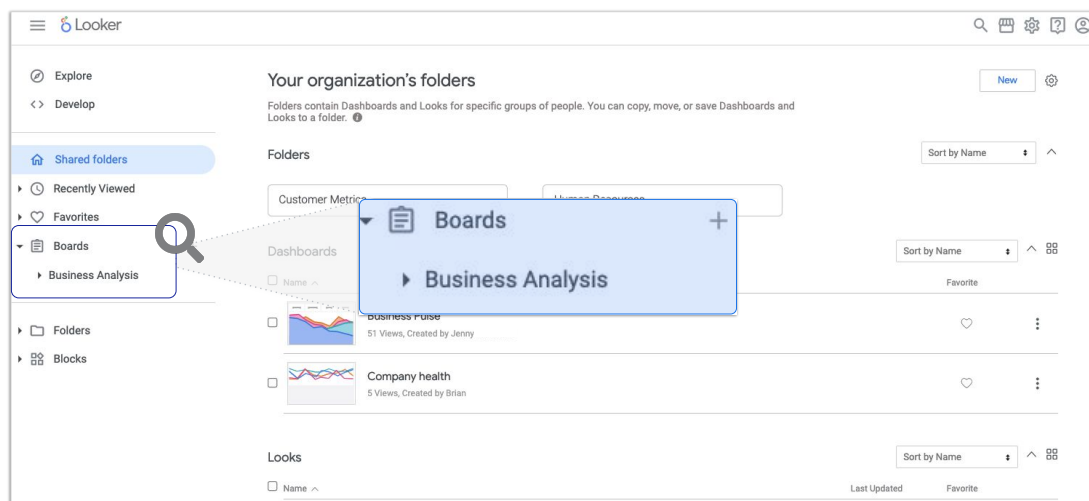
Examples are based on fictional data.

In summary, boards are a great way to centralize and share content that lives in different folders within your organization's Looker instance.

Boards link to content such as Looks and dashboards in their original location, so the pinned content is not affected by being added to a board or by user actions on a board. Any previously assigned access to a content item is also maintained, so you never have to worry about users accessing content that they have not been previously given access to.

Given these great benefits, we hope that you take full advantage of boards in your organization's Looker instance!

Summary

Organizing content with folders

Creating and browsing boards

In this module, we began by reviewing how you can use folders to organize your content in Looker and make it easily discoverable and accessible by others in your organization.

Summary

Organizing content with folders

Creating and browsing boards

We concluded this module with an exploration of boards, which you can use to centralize content that lives in different folders in your organization's Looker instance.
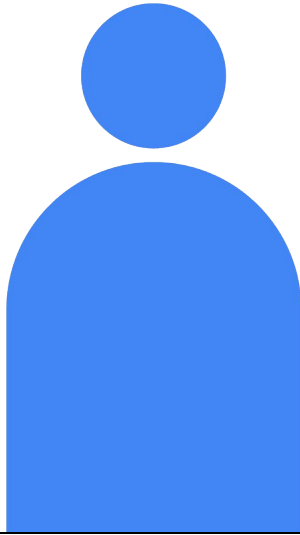
Hope you found this module useful in your Looker journey thus far!