Bookmarks

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Overview

top

This allows you to save the drill paths and filter values you have currently applied to the report in order to reapply them to fresh data at a later date.

Creating a Bookmark

top

In order to save a Bookmark of your report, in its current filtered and drilled state:

Click on the **Bookmarks** menu in the Report Builder
 Select the **Create Bookmark** option from the display.

•	Select the	Create Bo	okmark o	ption from	the display	yed drop d	down menu	
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					Save	e As		
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					Crea	ate Sna	pshot	

3. Fill in the details required in the Create Bookmark lightbox

Create Bookmark	
A bookmark saves your currently applied filter and drill down settings. It allows you to easily jump back to this point in the report.	
Name	
Description	
a the obligation of the state	
Public + Add people to make private	
form	
Save	

- a. Name: provide a name for your bookmark
- b. **Description:** provide a description of your bookmark
- Note: We recommend you describe the report so users understand what filters have been applied.
- c. Security: initially the bookmark will be Public (open to anyone that has access to the category and sub category the report is stored in), to secure the bookmark simply select users or groups that should have access.
- 4. Click Ok to save the bookmark

Viewing a Bookmark

- Locate and open the report it is based on
 Click on the Bookmark button on the left navigation panel

		Report	Edit				
		1					
3.	Select th) e name of the	Bookmark	you wisł	n to viev	W	
		Report	Edit				
		Bookn	narks	;		\times	
		Athletes	Athletes 15 - 29 👆 🛛 👋				
		C Athletes 15 - 29 Athletes aged between 15 and 29 when attending camp.					
						16/11/2016 1:4	2 PM

Using a Bookmark

top Bookmarks can be used on the Dashboard and within Storyboards in Yellowfin. In order to use them:

- Locate and add the report the bookmark is based on to the tab or slide
 A lightbox will display asking you to choose to add either the original report or a bookmark to your content

Select Report or Bookm. $\!$				
þ;				
Live	Repor	t		
This report will be added to the dashboard with default filter values and no drill down applied.				
		Ok		

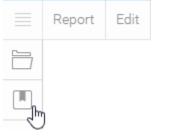
3. Choose the Bookmark option and click Select

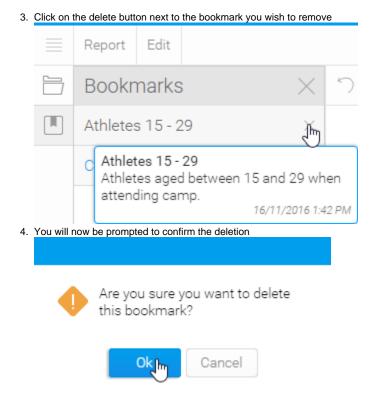
	Select Report or Bookm. $\!$	
	Bookmarks	
	This report will be added to the dashboard with pre-populated filters and drill down applied.	
	Select	
4.	Select the bookmark you wish to use an	d click Ok
	Select Report or Bookm.X	
	Bookmarks	
	Athletes 15 - 29	

Deleting a Bookmark

top In order to delete a bookmark you will need to:

- Locate and open the report it is based on
 Click on the Bookmark button on the left navigation panel





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