

# Adding Reports and Other Content

- Overview
- Story Narrative
  - Text formatting
    - Numbered list
    - Bullet point list
  - Copying text into your Story
- Embedding Reports
  - Add a report
  - Create New Report
  - Report display options
  - Replacing Reports
  - Chart Selection
  - Sharing Hidden Content
- External BI Content
- Other Story Content
  - Adding an image to a Story
    - Image resizing options
  - Embedding a video to a Story
  - Adding a divider
  - Reconstructing Story Content
- Deleting Content

## Overview

Yellowfin Stories gives you the power to include multiple types of content to your Story. This includes text narratives, reports, images and videos. You can add, edit, or delete content in this builder much like any other word processing tool.

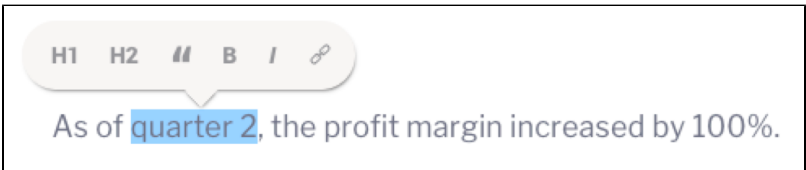
## Story Narrative

Add text to provide context to your story:

1. Simply click on a new line in the Story.
2. Start typing to enter your text, or you can also paste from your clipboard.
3. The text will be automatically saved to your Story.
4. To move on to the next line, press the Enter key.

## Text formatting

You can format your text by using a formatting menu, as well as with a combination of your keyboard keys.



Icon	Type	Description	Key combination
H1	Heading 1	Converts the entire line of text into a heading. Note: This heading format will take precedence over bold or italic formatting.	
H2	Heading 2	Converts the entire line of text into the sub-heading. Note: This heading format will take precedence over bold or italic formatting.	
“ ”	Quote	Converts the entire line of text into a quote.	
B	Bold	Makes only the selected text bold.	
I	Italic	Makes only the selected text italicized.	
🔗	Link	Converts the selected text into a link. When this icon is clicked, you will be asked to provide the URL to where the link should redirect to.	
	Numbered list	Creates a numbered/ordered list. See below for more details.	1.<space>
	Bullet point list	Creates a bullet list. See below for more details.	-<space> or *<space>

## Numbered list

To initiate a numbered list, follow the steps below:

1. Type 1. in either an empty line, or at the start of existing text, and then press the space key. Note that this will not work if the above key combination is added in the middle of a text.
2. The text line will be transformed to a numbered list.

Follow these rules to ensure maximum profit increase:

1. |

3. After providing text, press Enter to move to the next numbered item in the list. You can repeat this to add multiple items to this list.

Follow these rules to ensure maximum profit increase:

1. Figure out your gross profit margin.
2. Review all prices.

4. To end the list, simply press the Enter key once again *without* providing any text.

## Bullet point list

The steps to create or edit a bullet point list are the same as above. However, the keyword combination to activate an unordered list could either be the hyphen key and then the space key, or the asterisk key and space.

## Copying text into your Story

You can copy text from your Story, into another section of the same Story. In doing so, any formatting applied to the copied text will be retained when it is pasted. However, text copied from an external source, will not keep any of its original formatting.

---

## Embedding Reports

You can add analytical reports to your Story. When adding a report, there are 3 types of content that you can add:

- Live reports
- [Bookmarks](#) (a live report with pre-set filters)
- [Snapshots](#) (a saved copy of report data)

Choosing which report artifact to add, depends on what your Story is about. Consider the following to help you choose:

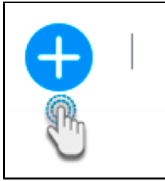
- Add a live report when you want to showcase the latest trends. Your report will display the most current data, as it is refreshed each time the Story is viewed.
- Include a bookmarked report to display results of pre-selected filters. For instance, instead of showing the sales of all the regions, you could limit the report to display only sales of the Asian region.
- Add a snapshot when you want to include static report data that does not change when the Story is refreshed. Ideal for when you want to point out results of a particular time period.

When you add a report artifact, you can choose which item to display for that report:

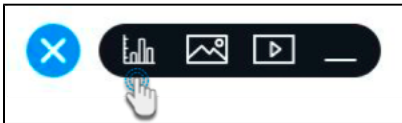
- chart or table
- the entire report canvas
- or in case of multiple charts, you can choose which of the charts to display (the first one is displayed by default)

## Add a report

1. Click on the **plus** button at the start of a new line. (Note if you do not see this button, simply click on a new line. The button will appear if no text gets entered.)



2. Then select the report icon from the reanimated menu.



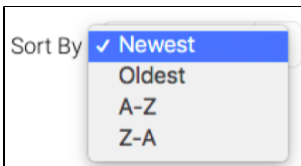
3. A popup will appear displaying all the reports that you have access to.

[blocked URL](#)

4. You can filter out relevant reports, snapshots or bookmarks in this popup by typing the name in the Search bar. Then click on the search icon at the end of the search bar.



5. You also have the option of sorting the reports. Click on the **Sort By** button and select how you want the items to be sorted in this popup.



6. You can choose to view the reports as thumbnails or in a list.



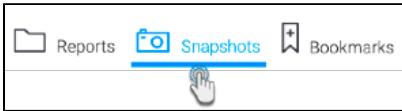
7. Click on the expand icon over a report's thumbnail, to maximize its image.



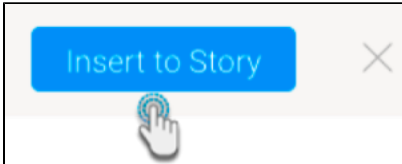
8. Click on a report thumbnail to select it. (You can select multiple reports to include them to the Story.)
9. Note that each report will display summarized information, such as the total number of its existing charts, bookmarks and/or snapshots. (You can click on the snapshot or bookmark icons to view those items for the specific report.)



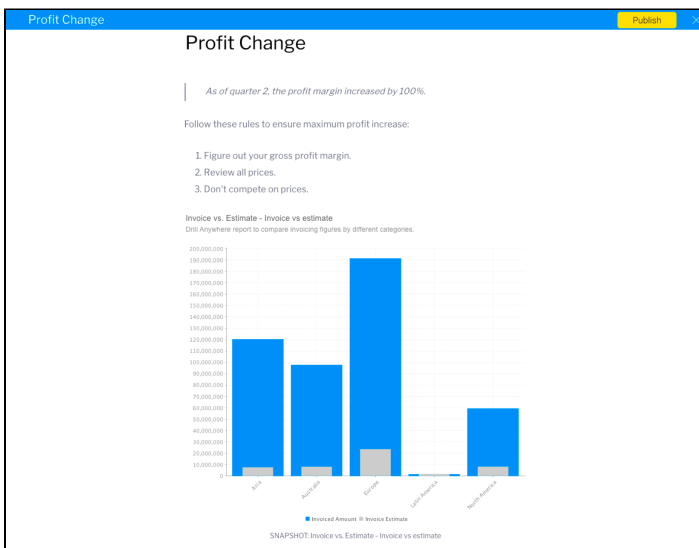
10. To include a snapshot to the story, click on the Snapshot tab at the top-left and then on the thumbnail of a snapshot.



11. Similarly, follow the same steps to include one or more bookmark(s).
12. Note: You can select multiple items to include them into the story at the same time. The order in which they are added to the story will depend on their order of selection.
13. Once you've made all the selections, click on the **Insert to Story** button. The selected items will be included to your story.



14. Each item will include a caption that can also be edited.



15. Simultaneously, you can click on the **Create new report** button if you want to create a report from scratch. On doing so, you will be asked to select your view and navigated to the Report Builder. See the note below.

[blocked URL](#)

16. The default formatting of the snapshot and bookmark captions indicate the artifact type, followed by the report name and ending with the name of the snapshot/bookmark.
17. You can use the edit menu to change the display of the report artifact. Refer to the section below to learn more.
18. Note that live reports and bookmarks will be automatically refreshed every time you access the story as their data may be changed. This may affect your story. (Snapshots will not be updated even if the data has changed, since they always remain static.)
19. You can interact with report artifacts embedded in Stories. Interactions that are supported, include tooltips, drilling, keep/exclude filtering, brushing, annotation.

## Create New Report

The Story module lets you create a new report from scratch via the **Create new report** button, discussed above. If you opt to do this, the live report will be automatically added to the story when you publish it. You can then navigate back to you Story by clicking on the Report to Story button at the bottom right corner of the Report page.

[blocked URL](#)

Note: while this report is being created, and until it is activated, story author and collaborators would see a placeholder in place of this report. Using the 'maximum' button on this placeholder, they can always navigate to the report.

[blocked URL](#)

## Report display options

Hover over a report to bring up the report menu. This includes options to let you resize the report's displayed size, choose the report view to display in the story, that is the chart, table, or canvas, or let you view the report in the Report Builder.



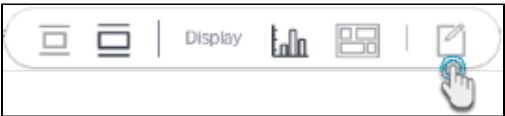
Note: If an icon is dark, then that means it is enabled. Whereas, grey means that the functionality is not applied. Click on a greyed out icon to apply that functionality. For example, clicking on the grey 'table' icon will display the report's table.

Icon	Description
	This resizes the report to a smaller size. You can switch between the small or big size of the report. Size limit: 400 pixels in width.
	Increases the displayed size of the report. (Enabled by default.) Size limit: 700 pixels in width.
	Displays only the report chart. In case of multiple charts, a popup will appear indicating the user to select one of the charts to be included. Click <a href="#">here</a> for more details.
	Displays the report table. Fits the size, but can be scrolled horizontally and vertically.
	Displays the report canvas. (Disabled by default, and only available if the added report has a canvas.) Note that a canvas cannot be resized in a story. The maximum size that can be displayed in the story is a default fit of 700 x 600 pixels. Bigger canvases will be cropped out. (When resizing the canvas in the Report Builder, pointers will indicate the maximum size that can fit a story.)
	Redirects you to the report output page, where you can edit the report and re-publish it. The changes will be reflected in a live report added to the Story. You can also use this to replace the report with a snapshot or bookmark, or add another artifact of the same report to your Story. Learn more <a href="#">here</a> .

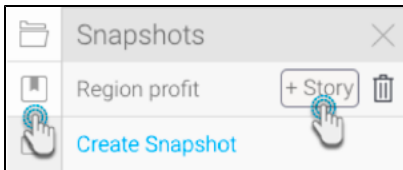
## Replacing Reports

Report artifacts, such as live reports, snapshots and bookmarks, that have been added to a story, can be replaced.

1. Place your cursor over the report artifact to be replaced. Then click on the *maximise* button. You will be taken to the report's output page.



2. There you can replace the artifact with a snapshot, bookmark or report by choosing an existing artifact or creating a new one.
3. For example, we want to replace the artifact with an existing snapshot. Click on the **+Story** button in the snapshot panel.



- On doing so, a message will appear that provides you with two options.



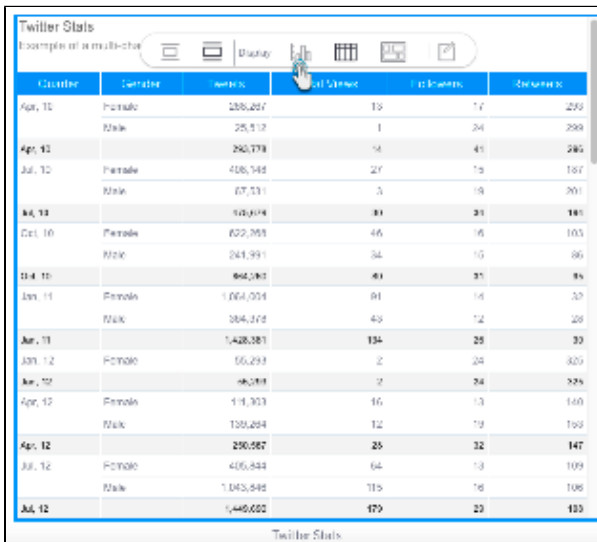
- Click on the **Replace item in Story** button to replace the artifact in the Story with the new one selected here (that is the snapshot).
- Or click **Add to the end of Story** to include this new artifact at the bottom of the Story (without replacing the old one).
- You can add multiple artifacts of the same report as well.
- Once done, click on the **Return to Story** button to get back to your draft Story. Note the artifact that you select here can only be included to the same Story.



## Chart Selection

If your report includes more than one chart, then you have the option of selecting which chart to include.

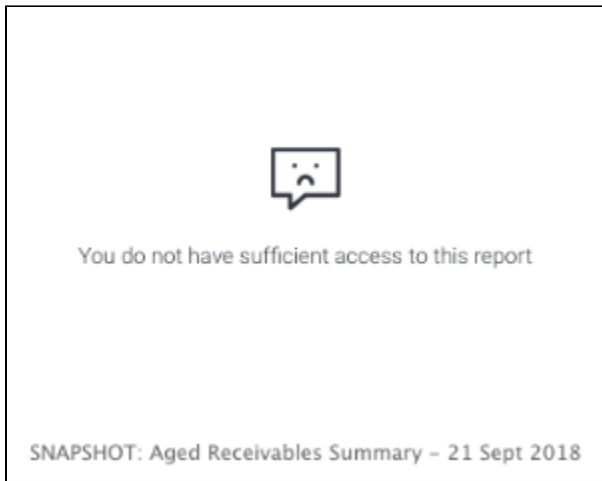
- Hover over a report, and when the menu appears, click on the **chart** icon.



- In case of multiple charts, a popup will appear. Choose one of the charts that you want to include. Then click **Insert to Story**.

## Sharing Hidden Content

If you add a secure report that is inaccessible to all your readers, then that report will be hidden for them in the story, with a message notifying them of the reason they can't view the report content. See the example below:



---

## External BI Content

You can incorporate reports from other reporting tools, such as Tableau, PowerBI, or Qlik, into your Yellowfin Story. This is done by providing a report link that embeds the report.



### Important

Before you begin, ensure that you have a proper Yellowfin license that supports Stories and the external content add-on. Users who want to embed external reports, will also require an additional user role function, called [External Content](#), enabled.

Follow the steps below to add a report from external BI tools.

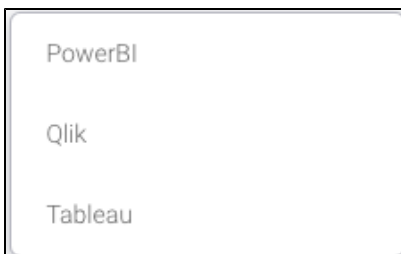
1. Click on the plus button at the start of a new line. (Note if you do not see this button, simply click on a new line. The button will only appear if no text gets entered.)

[blocked URL](#)

2. Select the 'reporting tools' icon from the menu.

[blocked URL](#)

3. This provides you with a selection of available reporting tool choices. Select one whose content you would like to embed into your Story.



4. A popup menu will appear. Provide the link to your external report here.

[blocked URL](#)

5. Then click Insert. Ensure that you have provide the correct link for this to work. If you accidentally provide a link to a PowerBI report while choosing the Tableau option, an error will occur.
6. Once the report appears on the screen, you can even resize it. To do so, hover over the report, and when the resize option appears at the bottom right of the report, click and drag it to change the size of the embedded report.

[blocked URL](#)

7. You can also provide a caption for this report, by clicking directly under the report.

[blocked URL](#)

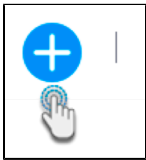
---

## Other Story Content

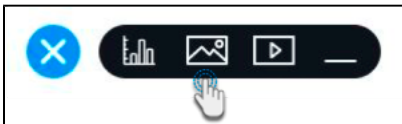
Besides text and reports, you can include additional content such as images, videos and even dividers into a Story.

### Adding an image to a Story

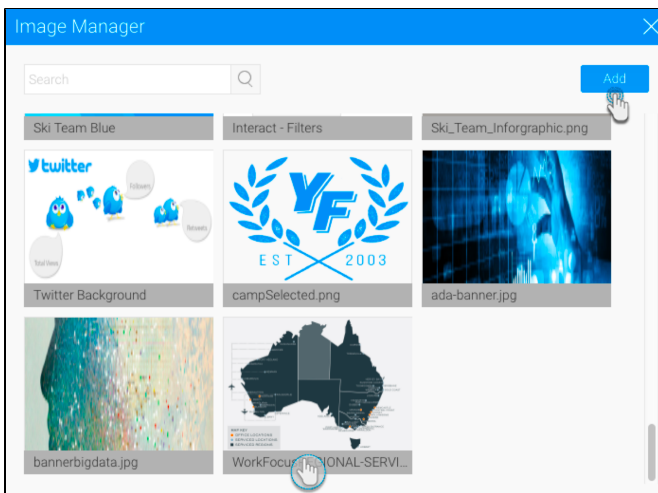
1. Click on the **plus** button at the start of a new line. (Note if you do not see this button, simply click on a new line. The button will only appear if no text gets entered.)



2. Select the **image** icon from the menu.



3. The image manager popup will appear. Use it to choose an existing image by selecting its thumbnail, or add a new image by using the **Add** button.



4. Once added, you can resize the image. See the chart below for the options.
5. The image will be captioned with its name, which can also be edited or removed.

### Image resizing options



Icon	Size option	Description
	Original	Displays the image in its actual size. This option is only available if the original image width is less than 700 pixels.
	Fit	Displays the image to fit the Story size, which is 700 pixels (that is, the image width will be stretched to 700 px while maintaining the aspect ratio). The image is displayed in this size by default.
	Wide	The maximum size an image can be displayed in. (This option will stretch the width to 900 pixels, while maintaining the aspect ratio.)

## Embedding a video to a Story

You can embed Youtube or Vimeo videos into your story. Here's a simple procedure that explains how to do this:

1. Click on the **plus** button at the start of a new line. (Note if you do not see this button, simply click on a new line. The button will only appear if no text gets entered.)
2. Select the **video** icon.



3. Copy the link from either video platform, and paste it in the area specified. Press the Enter key.
4. The video will be displayed, and captioned with the link. You can edit or remove the caption.



5. To delete the video, simply select it and press the Delete key.

**Note:** Although the video image will be displayed in a Story while in draft mode, it can only be played when the Story is published.

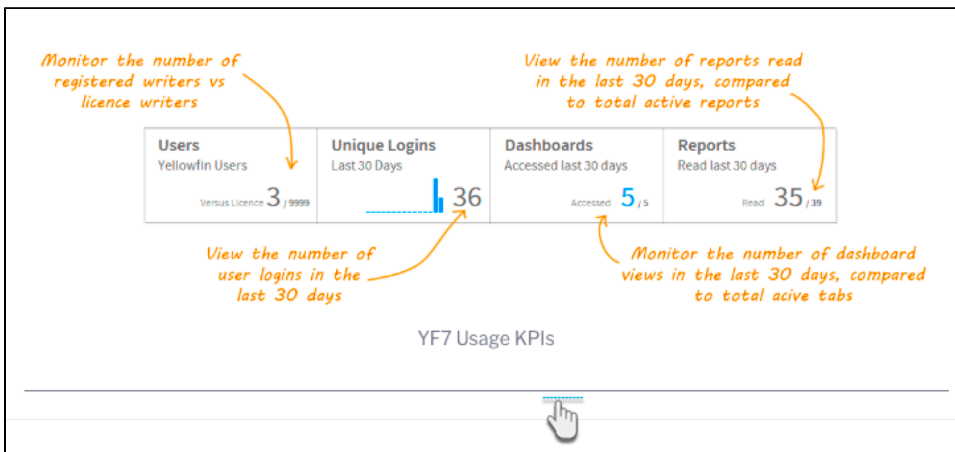
## Adding a divider

Include a divider in your story to display a horizontal line that's used to divide your story content.

1. Click on the **plus** button at the start of a new line. (Note if you do not see this button, simply click on a new line. The button will only appear if no text gets entered.)
2. Then select the **divider** icon.



3. A horizontal line will appear.



## Reconstructing Story Content

Once you have added content, such as text, reports, images, or videos, you can drag it to another part of the Story. This gives you freedom to restructure your story content after adding it (even highlighted text), saving you the trouble of redoing your Story.

A drop indicator will show you the exact location you're dropping the content to.

[blocked URL](#)

## Deleting Content

You can delete an attached content, such as a report, image, video, etc, by selecting the item and pressing the backspace or delete key.