Bookmarks & Snapshots

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Overview

Report Edit

Invoice colours
Ski Team, 25/10/2018 11:13 PM

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Bookmarks and Snapshots provide a means to return to a report's current state at a later date.

Types

The three options available are:

Allow 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.

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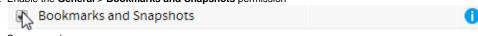
Allow you to save the result set of your current report with the drill paths and filters you've currently applied. A snapshot becomes a static report, meaning that you can no longer interact with it, it has been designed to preserve a result set at a point in time to use for comparison later.

Enabling Bookmarks & Snapshots

Bookmarks & Snapshots#top

In order to use the Bookmark and/or Snapshot functionality in Yellowfin, you will need to ensure the required permission is enabled by completing the following:

- 1. Navigate to Administration > Admin Console > Role Management
- 2. Edit the Role(s) you wish to give Bookmark and Snapshot access to
- 3. Enable the General > Bookmarks and Snapshots permission



4. Save your changes

Note: in order to access the newly enabled functionality, users will have to log out and then log in.