Report Annotation

Overview

Yellowfin allows you to annotate time series charts by highlighting and commenting on key points of interest, providing further detail for the report reader. Annotations are only available on reports with manually-selected time series chart visualizations.

Annotations are displayed in multiple places on a report, as seen in the example below.
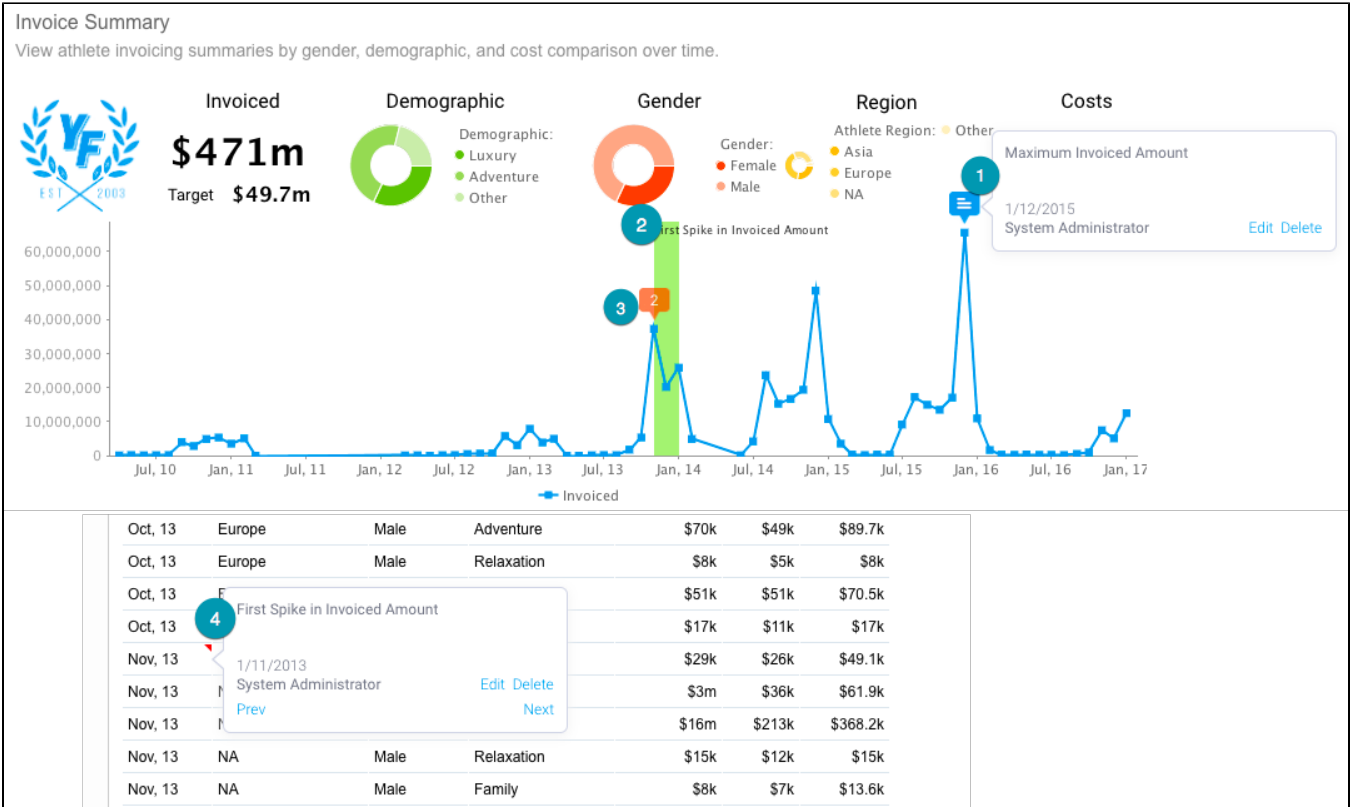
Number	Feature	Description
1	Annotation flag	Shows the details of an annotation via a tooltip on the chart visualization. If an annotation is private, it appears **orange** on the chart visualization.
2	Highlighted area	Shows that the annotation is applied to a date range as opposed to a single date.
3	Multiple annotations flag	Shows how many annotations are applied to a given point.
4	Annotation flag	Shows the details of an annotation via a tooltip on the report table.

Enabling annotations

To use annotations in Yellowfin, an administrator must enable annotation **permissions** for a user's role, and annotations must be enabled correctly for a given **report**.

Annotation permissions

Administrators must enable annotations for a user's role via the Admin Console. There are *C*reate, *R*ead, *U*pdate, and *D*elete role permission options available.

✓ Only administrators can change role permissions. For more information on how to create and edit roles, visit Roles.

Report annotation settings

To display annotations on a given report, the report annotation settings must be enabled via the annotations toolbar on the draft or published report page.

1. From the report page, click the **Annotation tool** on the toolbar to open **Annotation Settings** window
2. Click on the **Display** section

3. Toggle on the **Chart Display** and **Table Display** toggles to enable annotations for this report
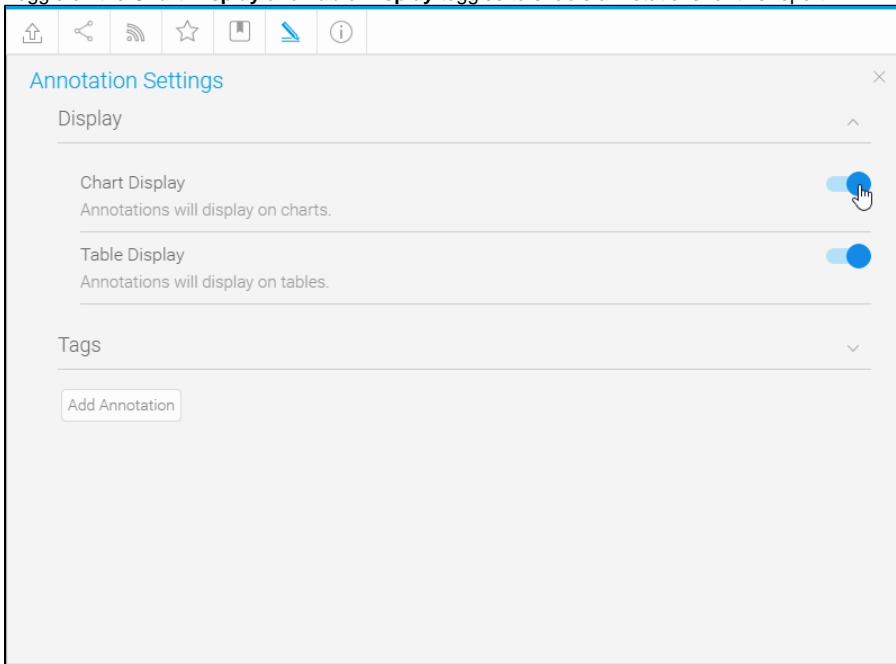
Creating annotations

Follow the steps below to create an annotation.

1. From the report page, click the **Annotation tool** on the toolbar to open **Annotation Settings** window
2. Click on the **Add Annotation** button

The **Annotation** dialog box will display, providing you with the following options

Annotation ✕

Select Date ⌄   Select Visibility ⌄

B I U ≡ ≡ ≡ ≡ ≣ ≣ ⇥ ⇤

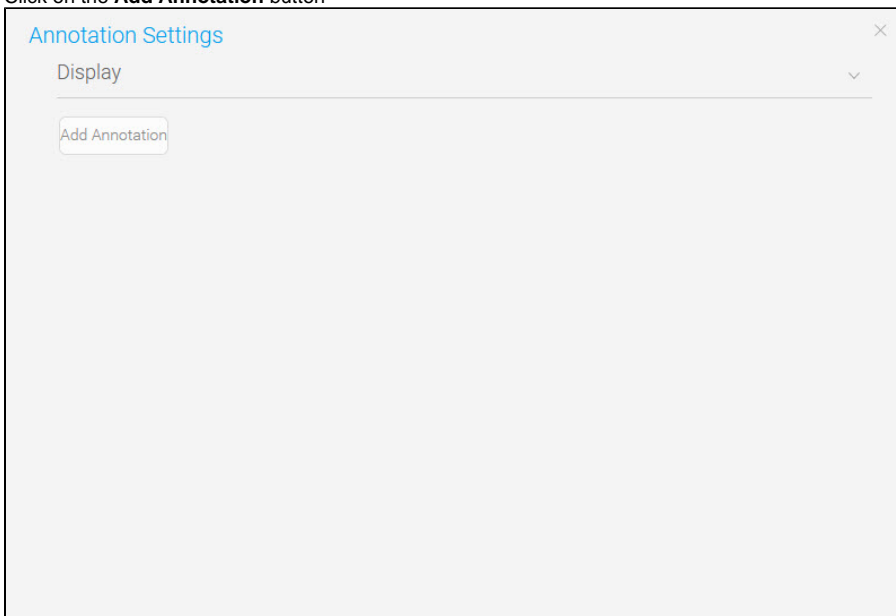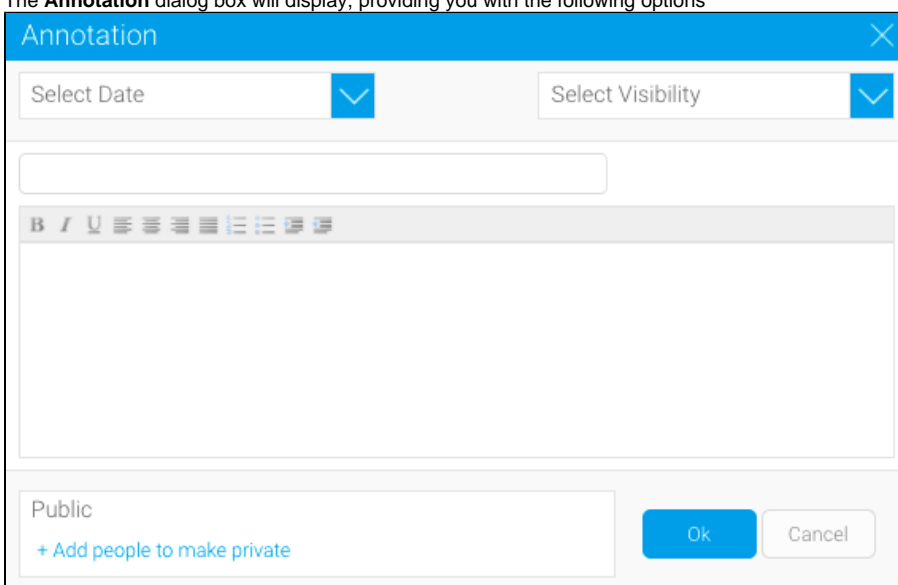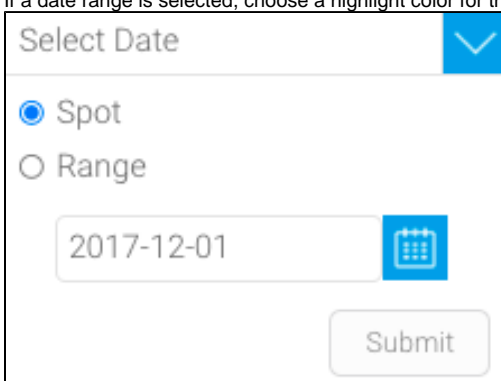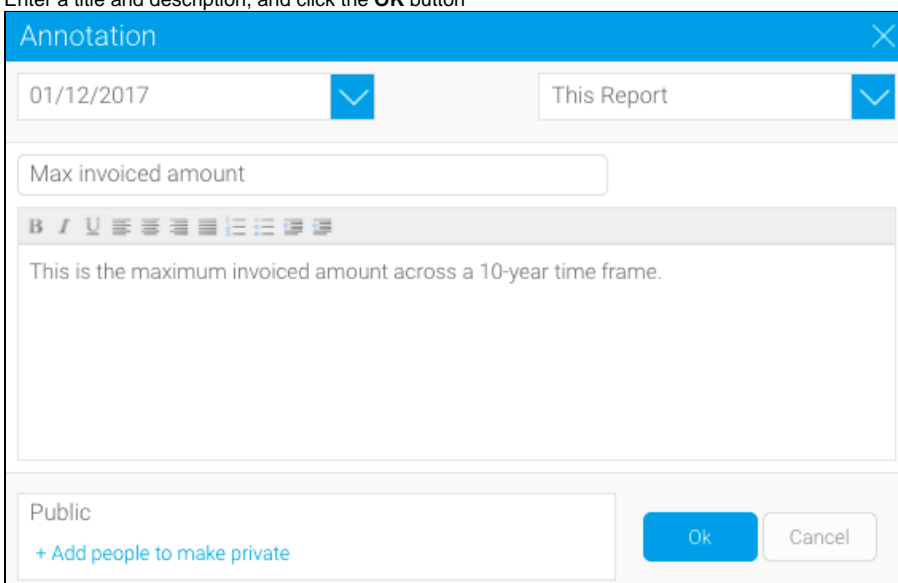Public
+ Add people to make private   Ok   Cancel

3. Nominate the date, or date range for your annotation and click the **Submit** button
   If a date range is selected, choose a highlight color for the chart annotation

Select Date ⌄

⦿ Spot
○ Range

2017-12-01 📅

Submit

4. Click the **Select Visibility** dropdown and click **This Report**
5. Enter a title and description, and click the **OK** button

Annotation ✕

01/12/2017 ⌄   This Report ⌄

Max invoiced amount

B I U ≡ ≡ ≡ ≡ ≣ ≣ ⇥ ⇤

This is the maximum invoiced amount across a 10-year time frame.

Public
+ Add people to make private   Ok   Cancel

The report page will be displayed with the annotation flag visible at the selected date
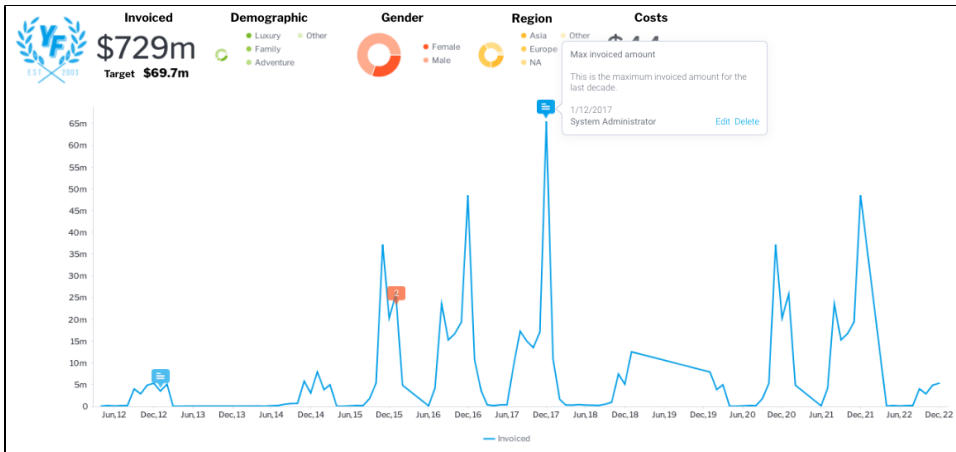
When using multi-chart reports, annotations may not display immediately. Click **Preview** from the report page toolbar to preview the live report along with your annotations.

Annotation settings

Date

Nominate the date or date range for your annotation. If a date range is selected, you can choose a highlight color for the chart annotation.

Filter

The optional filter setting allows you to associate an annotation with a filter value. This means an annotation is only available if the report contains the selected filter, and the specified value is available.

To link your annotation to a filter value, complete the following steps:

1. Add the required filter to your report, ensuring that it is a cached user prompt filter
2. Click the Select Filter dropdown in the **Annotation** window, and choose your filter from the first dropdown list

3. Select the desired value from the second dropdown list in the **Annotation** window and click the **Submit** button

If you apply a filter link to your annotation, the visibility options will be reduced to This Report and Multi-Report -View, as the filter is linked to a view field and cannot be applied to reports based on other views.
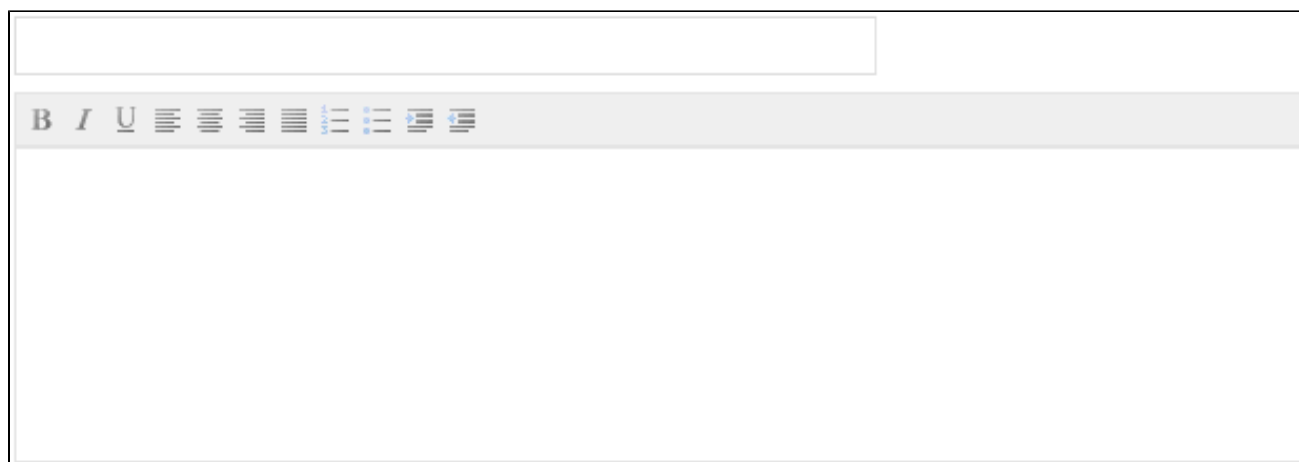
Visibility

You can select a visibility level for an annotation to restrict the content it can appear on. There are three levels available.

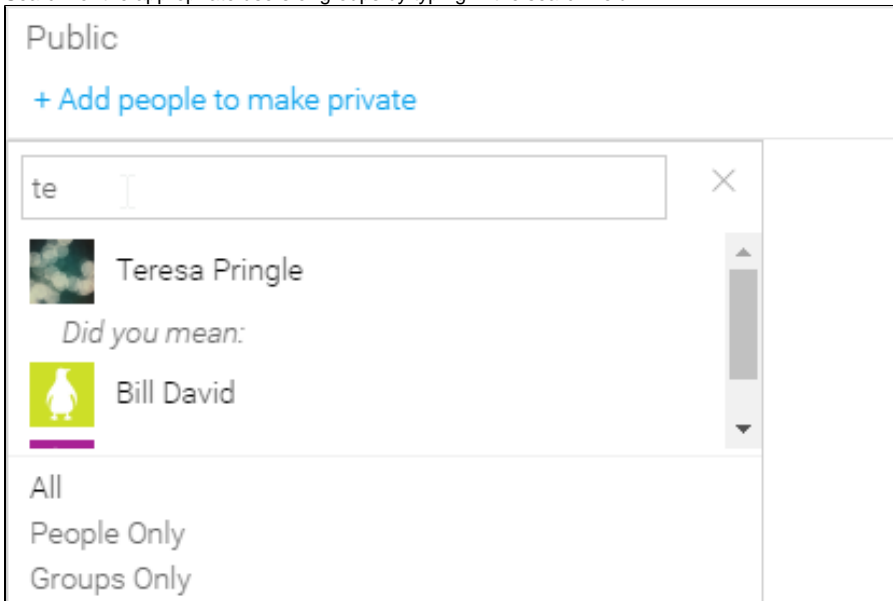| Option	Level	Description
This Report	Report level	If selected, annotations are attached to a single report. Any date that falls on the specified date, or within the range, will be annotated.
Multi-Report - View	View level	If selected, annotations will be applied to all reports at the view level with the same data.
Multi-Report - Global	Organization level	If selected, anyone who belongs to the same organisation as the annotation creator will be able to see these annotations on any reports with the matching date data.

Title & description

The following fields allow you to enter a subject title and description for an annotation.
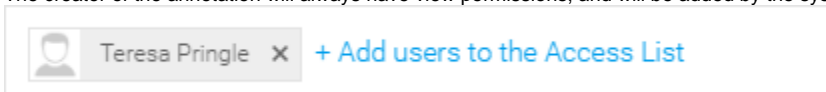

Security

Annotations are set to public by default. To restrict visibility of the annotation, complete the following steps:

1. Click on **+ Add people to make private**
2. Search for the appropriate users or groups by typing in the search field

3. Click on the users/groups you wish to add
   The creator of the annotation will always have view permissions, and will be added by the system automatically

4. Once all other fields are complete, click the OK button to create the annotation
   The private annotation flag will appear **orange** on the chart visualization

> ✅ Annotations will always be secured by Client Org (if configured). If a public annotation is created within a given org, only users and groups within that org will see it.
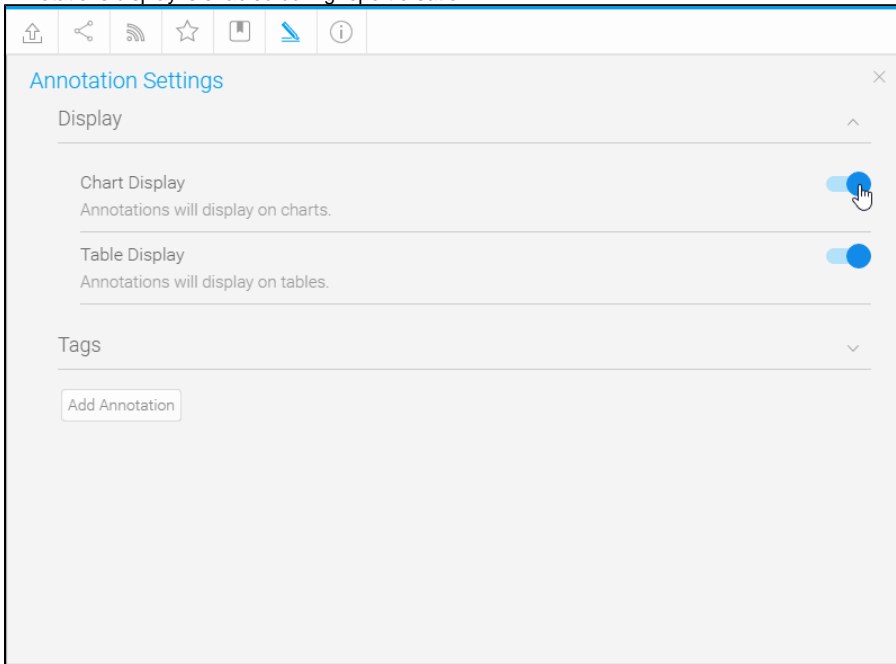
Viewing annotations

By default, a report will display an annotation if the following criteria are met:

1. The report and/or time series chart contains the matching date or range specified in the annotation

2. Annotations display is enabled during report creation

Global annotations

When using the Client Orgs feature in Yellowfin, administrators of the Primary Org can enable **Global Annotations**. When enabled, all annotations created at the Primary Org (default level) will be passed through and visible in all Client Orgs.
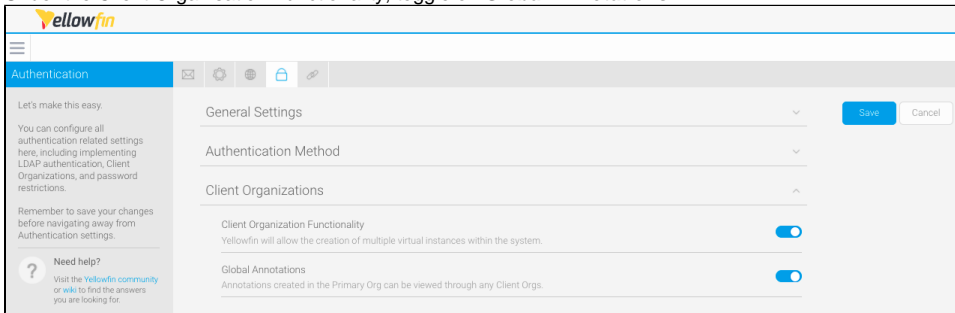
> ✓ Users logged in at the Client Org level will not be able to edit or delete the Global Annotations. However, they will be able to display or hide them through the same display settings as their own client annotations.

Anyone with Yellowfin administrator rights can enable Global Annotations for Client Orgs. Follow the steps below.

1. On the left-side navigation pane, click on **Administration**, then **Configuration**

2. Click on the **Authentication** [🔒] tool along the top of the screen, then click on the **Client Organizations** section to display the following options
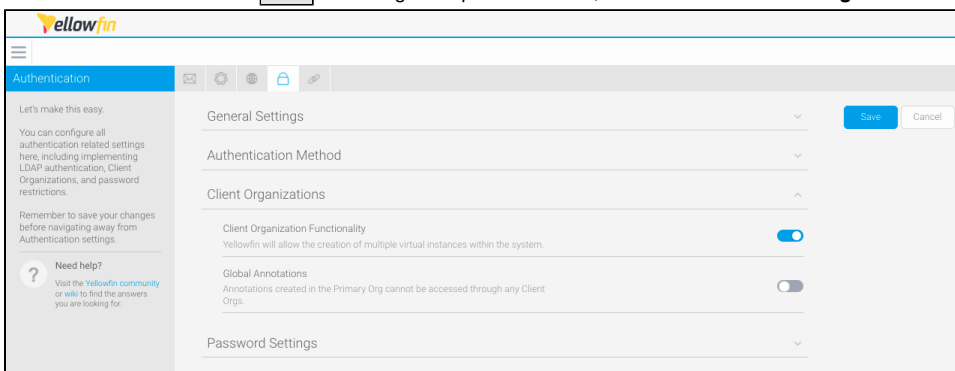
3. Under the Client Organisation Functionality, toggle on **Global Annotations**

4. Click the **Save** button to save the settings

✓ When Global Annotations are enabled, the annotations at the Primary Org level will be set to public.

top