

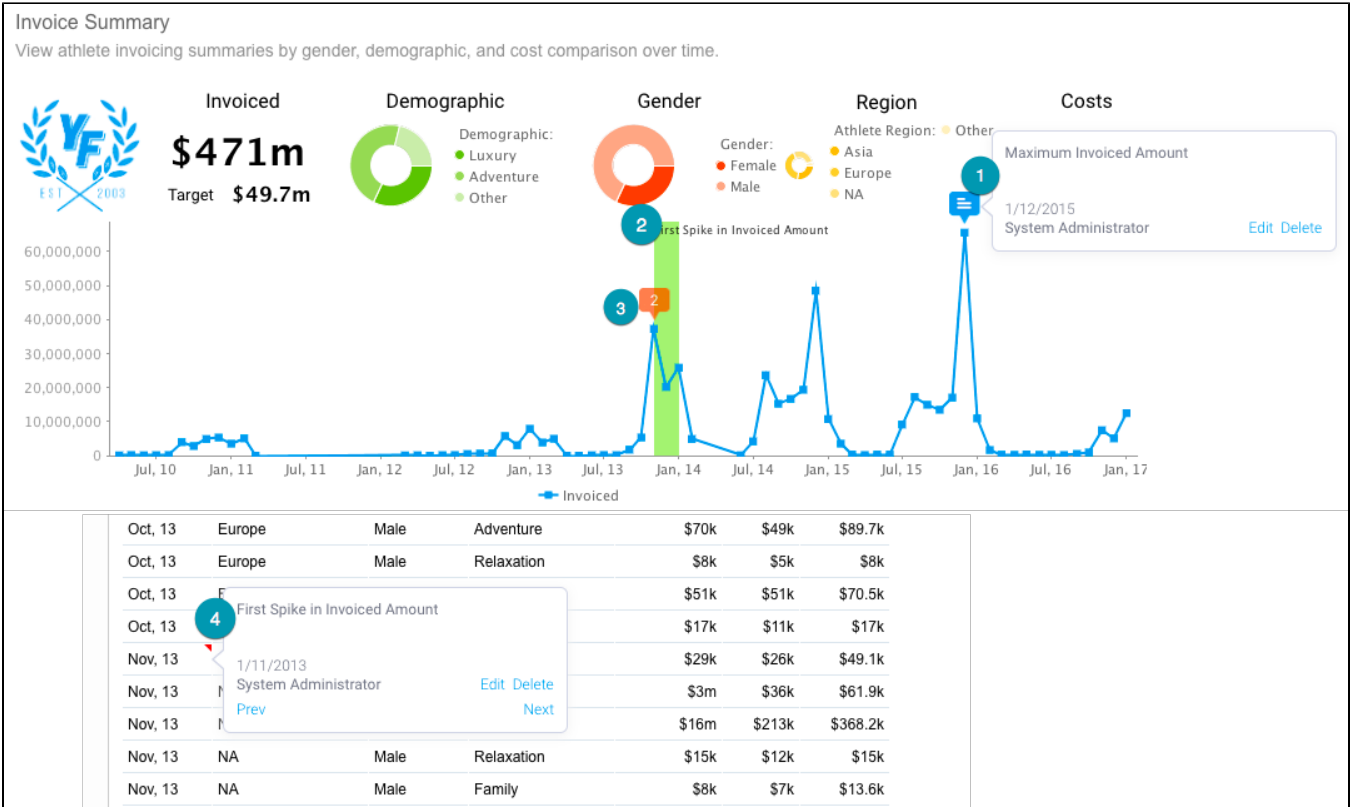
Report Annotation





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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 	<p>Shows the details of an annotation via a tooltip on the chart visualization.</p> <p>If an annotation is private, it appears orange  on the chart visualization.</p>
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.

Collaboration			
<input checked="" type="checkbox"/>	Allow Attachments on Comments		
<input type="checkbox"/>	Hide Comments		
<input checked="" type="checkbox"/>	Annotations	<input checked="" type="checkbox"/> C <input checked="" type="checkbox"/> R <input checked="" type="checkbox"/> U <input type="checkbox"/> D	
<input checked="" type="checkbox"/>	Timeline		
<input checked="" type="checkbox"/>	Connections		
<input checked="" type="checkbox"/>	Discussion Topics	<input checked="" type="checkbox"/> C <input checked="" type="checkbox"/> R <input checked="" type="checkbox"/> U <input checked="" type="checkbox"/> D	
<input type="checkbox"/>	Collaboration Admin		
<input checked="" type="checkbox"/>	Activity Stream		
<input checked="" type="checkbox"/>	Enable Tasks		
<input checked="" type="checkbox"/>	Personal Tasks		
<input checked="" type="checkbox"/>	Public Tasks		
<input type="checkbox"/>	System Task Admin		



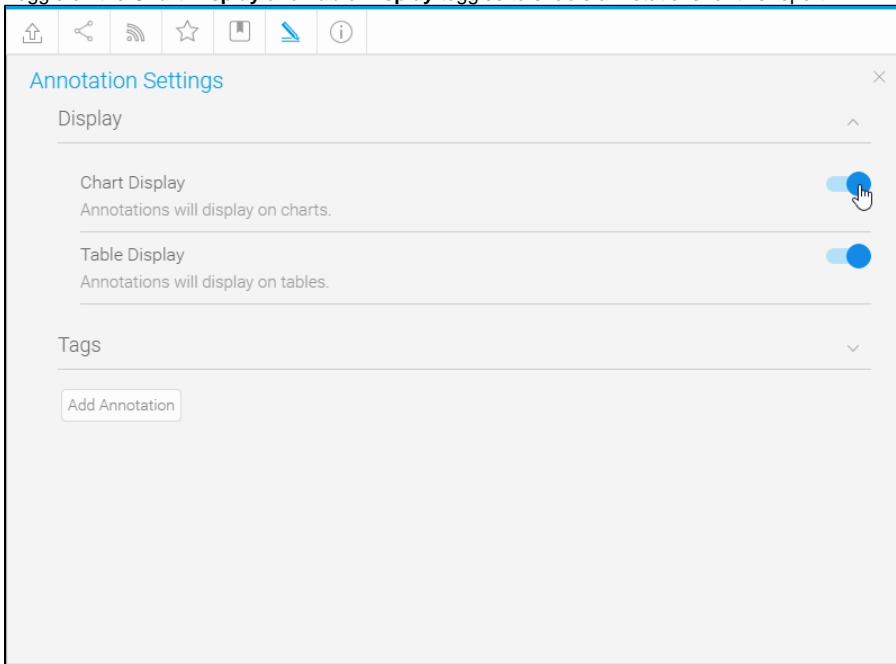
Only administrators can change role permissions. For more information on how to create and edit roles, visit [Roles](#).

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

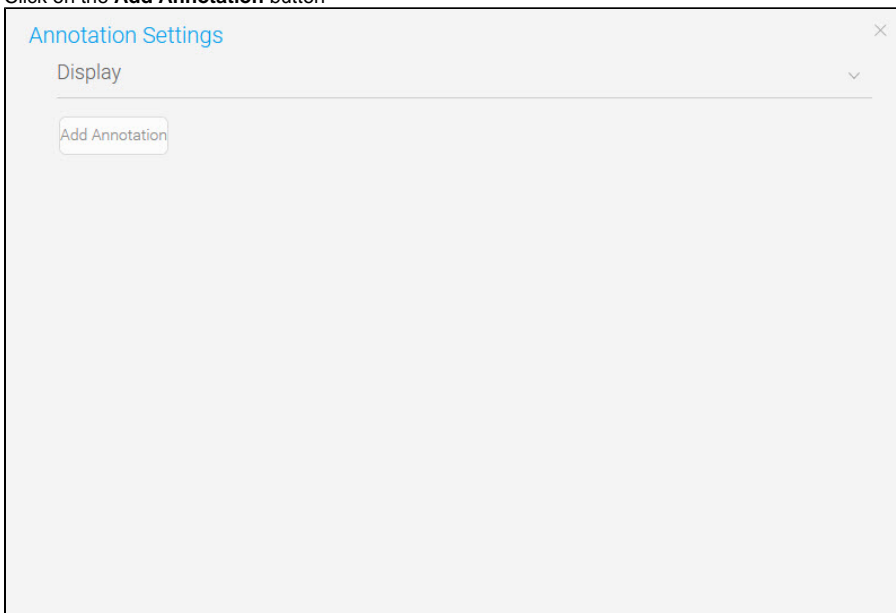


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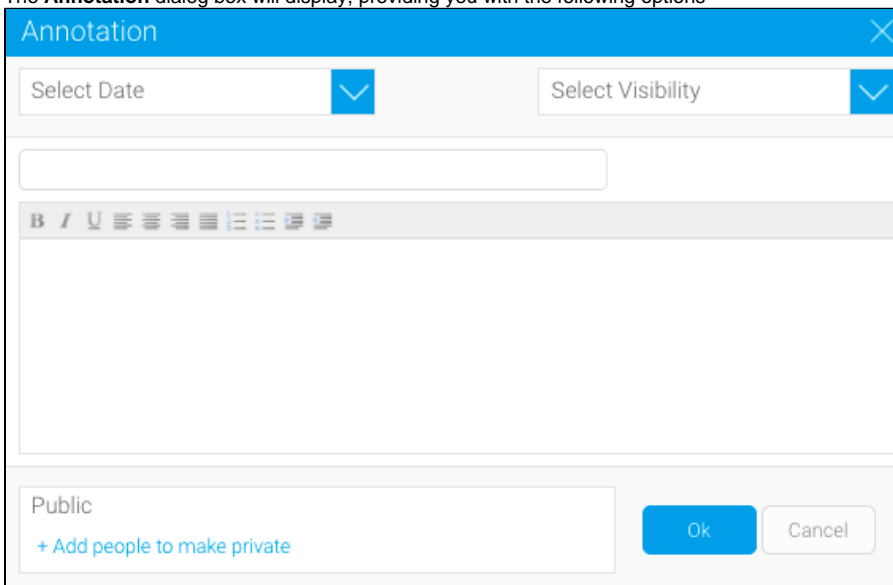
Creating annotations

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

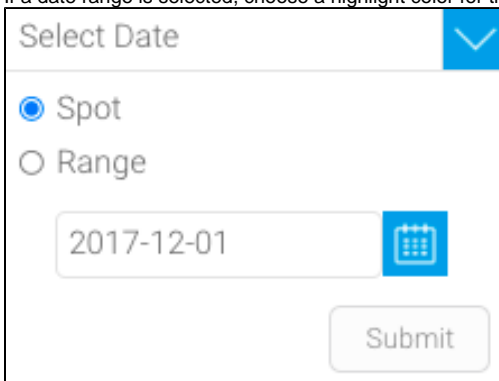


The **Annotation** dialog box will display, providing you with the following options



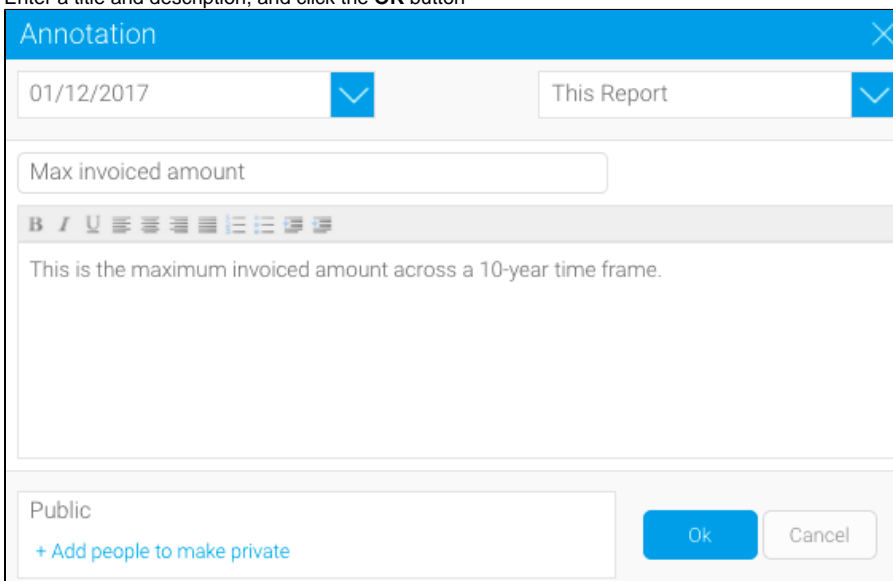
The Annotation dialog box features a blue title bar with a close button. It contains two dropdown menus at the top: 'Select Date' and 'Select Visibility'. Below these is a text input field. A rich text editor toolbar is visible, followed by a large text area. At the bottom, there is a 'Public' label, a link '+ Add people to make private', and 'Ok' and 'Cancel' buttons.

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



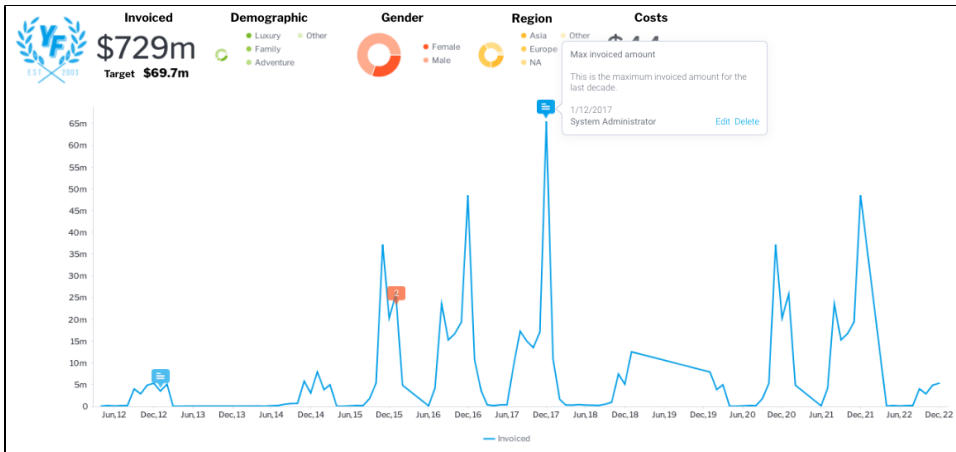
The Select Date dialog box has a blue title bar with a close button. It contains a 'Select Date' dropdown menu. Below it are radio buttons for 'Spot' (selected) and 'Range'. A date input field shows '2017-12-01' with a calendar icon. A 'Submit' button is at the bottom.

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



The Annotation dialog box is shown with content. The 'Select Date' dropdown is set to '01/12/2017' and the 'Select Visibility' dropdown is set to 'This Report'. The text input field contains 'Max invoiced amount'. The rich text editor toolbar is visible, and the text area contains the description 'This is the maximum invoiced amount across a 10-year time frame.' The bottom section shows 'Public', '+ Add people to make private', and 'Ok' and 'Cancel' buttons.

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.

Select Date

Spot

Range

14/10/2016

14/10/2016

Submit

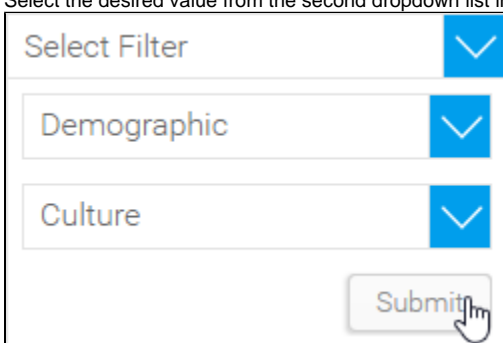
Filter

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

A screenshot of the 'Annotation' window. It features a 'Select Filter' dropdown menu at the top with a blue chevron icon. Below it are two more dropdown menus, one showing 'Demographic' and the other 'Culture', both with blue chevron icons. At the bottom right is a 'Submit' button with a hand cursor icon pointing to it.

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

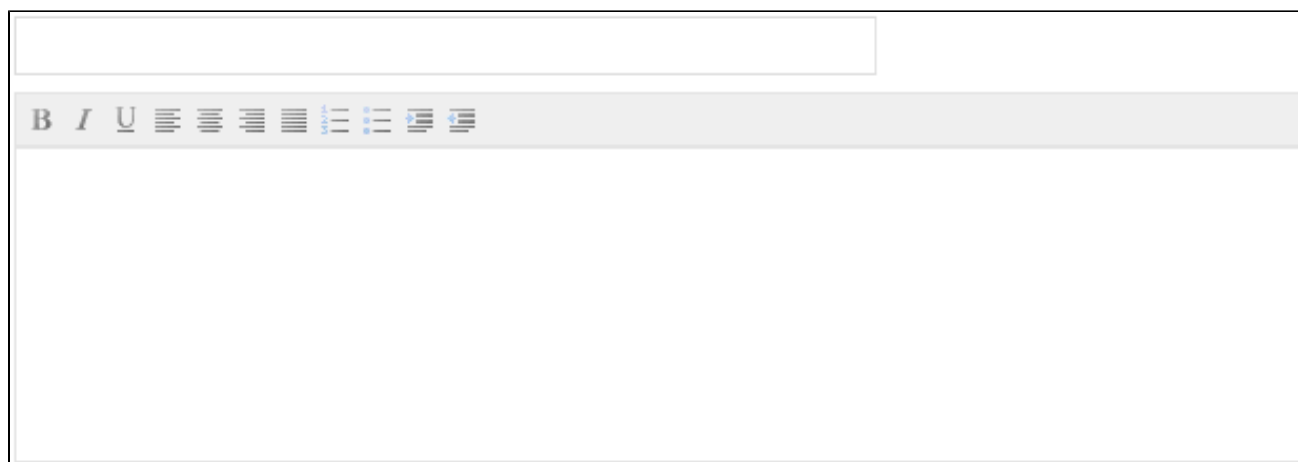
You can select a visibility level for an annotation to restrict the content it can appear on. There are three levels available.

A screenshot of the 'Select Visibility' dropdown menu. It has a blue chevron icon at the top right. The menu is open, showing three options: 'This Report', 'Multi-Report - View' (which is highlighted with a grey background and a mouse cursor), and 'Multi-Report - Global'.

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

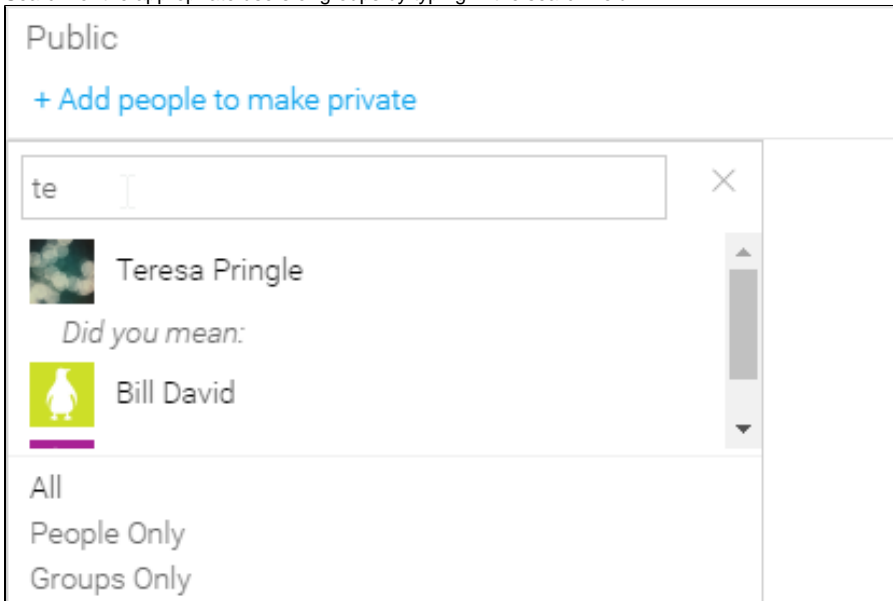
The following fields allow you to enter a subject title and description for an annotation.

A screenshot of the 'Title & description' form. It has a large text input field at the top. Below it is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), bulleted list, numbered list, decrease indent, increase indent, link, unlink, and source code. Below the toolbar is a large text area for the description.

Security

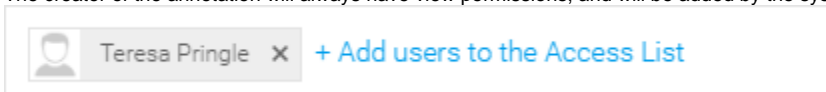
Annotations are set to public by default. To restrict visibility of the annotation, complete the following steps:

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



The screenshot shows a dialog box titled "Public". At the top, there is a blue link "+ Add people to make private". Below this is a search input field containing the text "te". To the right of the input field is a close button (X). Below the search field, a list of search results is displayed. The first result is "Teresa Pringle" with a profile picture. Below it, the text "Did you mean:" is shown. The second result is "Bill David" with a profile picture. At the bottom of the dialog box, there are three radio button options: "All", "People Only", and "Groups Only".

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



The screenshot shows a dialog box titled "Add users to the Access List". It contains a list of users with a profile picture and the name "Teresa Pringle". To the right of the user name is a close button (X). To the right of the list is a blue link "+ Add users to the Access List".

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.

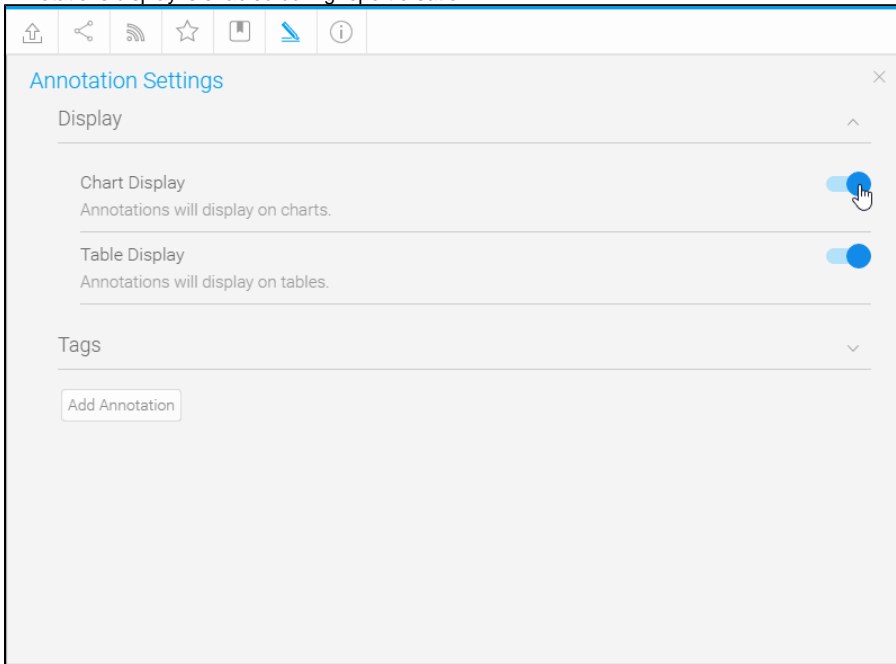
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Viewing annotations

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



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Global annotations

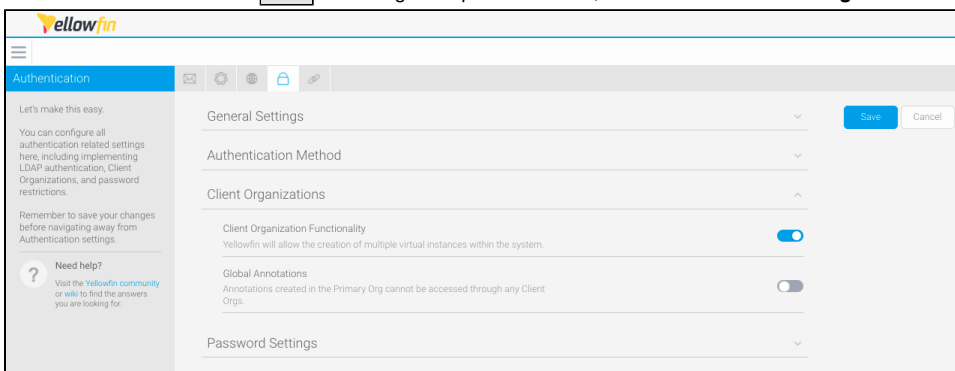
When using the [Client Orgs](#) feature in Yellowfin, administrators of the Primary Org can enable **Global Annotations**. When enabled, all annotations created at the Primary Org (default level) will be passed through and visible in all Client Orgs.



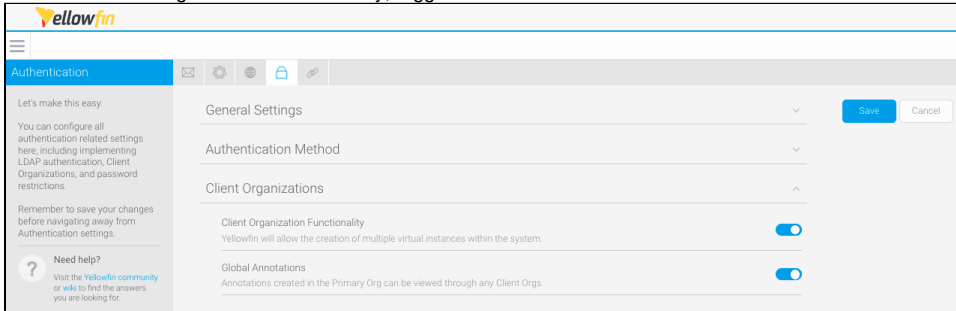
Users logged in at the Client Org level will not be able to edit or delete the Global Annotations. However, they will be able to display or hide them through the same display settings as their own client annotations.

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**



The screenshot shows the Yellowfin Authentication settings page. The left sidebar contains a 'Need help?' section with a link to the Yellowfin community or wiki. The main content area is divided into three sections: 'General Settings', 'Authentication Method', and 'Client Organizations'. The 'Client Organizations' section contains two toggle switches: 'Client Organization Functionality' and 'Global Annotations', both of which are currently turned on. A 'Save' button is located in the top right corner of the settings area.

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.

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