Bookmarks & Snapshots

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Overview

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				Save As
				Create Bookmark
				Create Snapshot

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

Types

The three options available are:

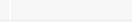
Sav e As	Allows you to essentially save a copy of your current report, with the drill paths and filter values you have currently applied as pre-defined (not user prompt) filters.
Boo kma rks	Allow you to save the drill paths and filter values you have currently applied to the report in order to reapply them to fresh data at a later date.
Sna psh ots	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

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

Bookmarks and Snapshots



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4. Save your changes

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

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