Bookmarks

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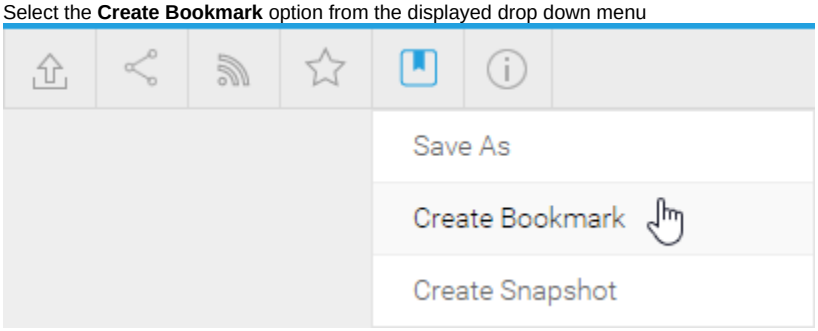
Overview

top
This allows 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.

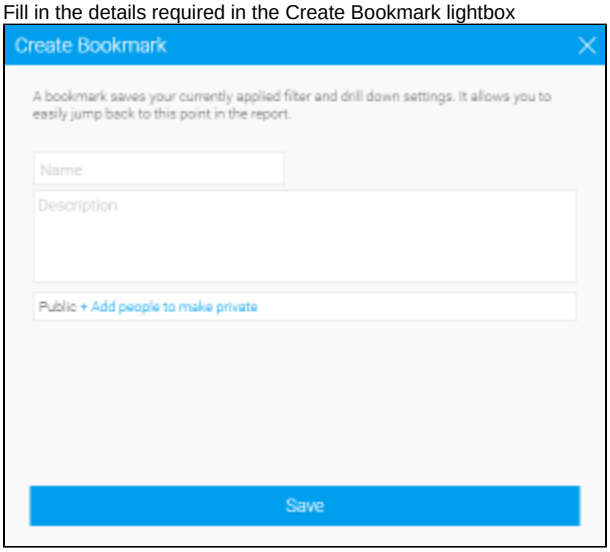
Creating a Bookmark

top
In order to save a Bookmark of your report, in its current filtered and drilled state:

1. Click on the **Bookmarks** menu in the Report Builder
2. Select the **Create Bookmark** option from the displayed drop down menu



3. Fill in the details required in the Create Bookmark lightbox

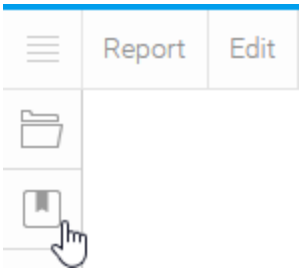


   a. **Name:** provide a name for your bookmark
   b. **Description:** provide a description of your bookmark
      Note: We recommend you describe the report so users understand what filters have been applied.
   c. **Security:** initially the bookmark will be Public (open to anyone that has access to the category and sub category the report is stored in), to secure the bookmark simply select users or groups that should have access.
4. Click **Ok** to save the bookmark

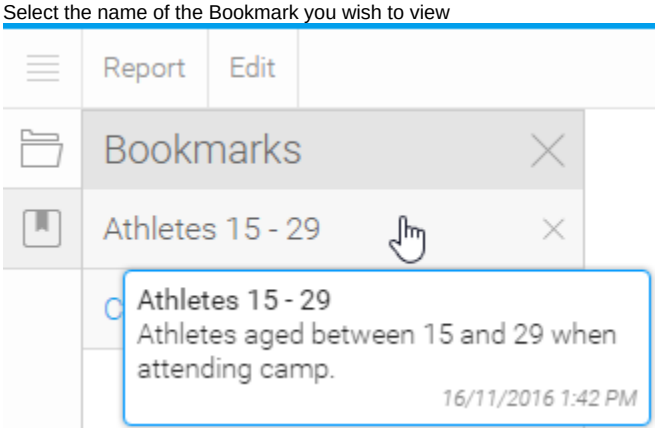
Viewing a Bookmark

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In order to view a bookmark you will need to:

1. Locate and open the report it is based on
2. Click on the Bookmark button on the left navigation panel



3. Select the name of the Bookmark you wish to view

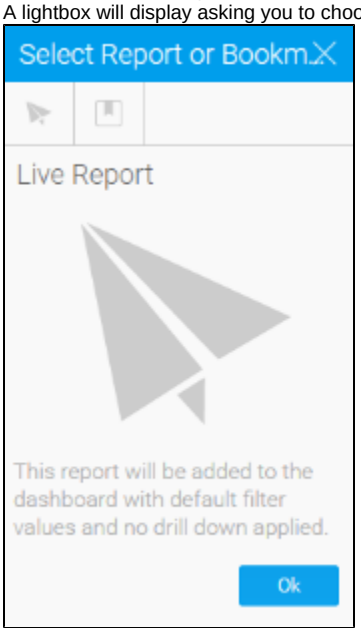


Using a Bookmark

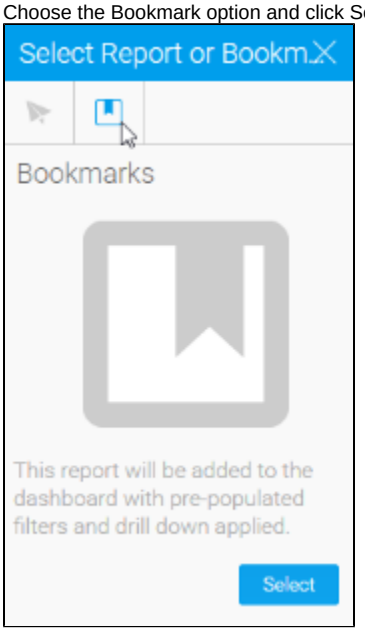
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Bookmarks can be used on the Dashboard and within Storyboards in Yellowfin. In order to use them:

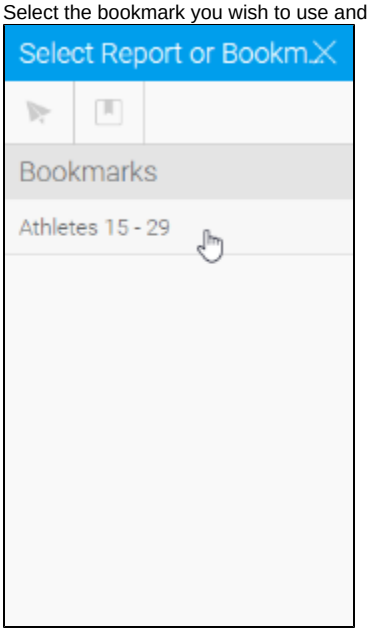
1. Locate and add the report the bookmark is based on to the tab or slide
2. A lightbox will display asking you to choose to add either the original report or a bookmark to your content



3. Choose the Bookmark option and click Select



4. Select the bookmark you wish to use and click Ok

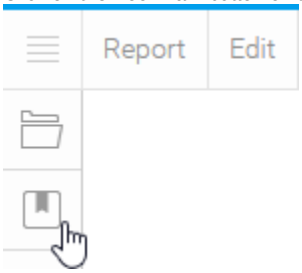


Deleting a Bookmark

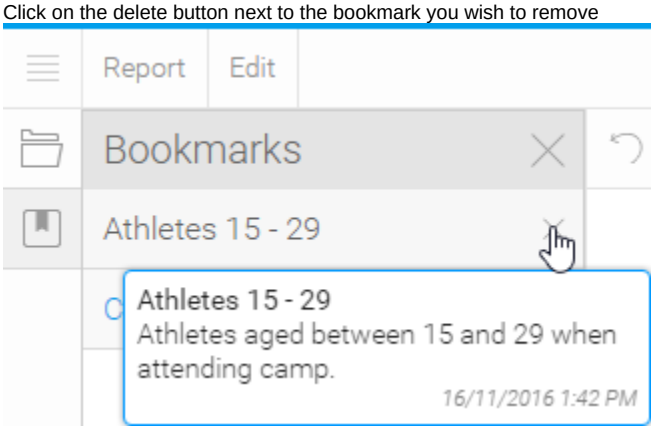
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In order to delete a bookmark you will need to:

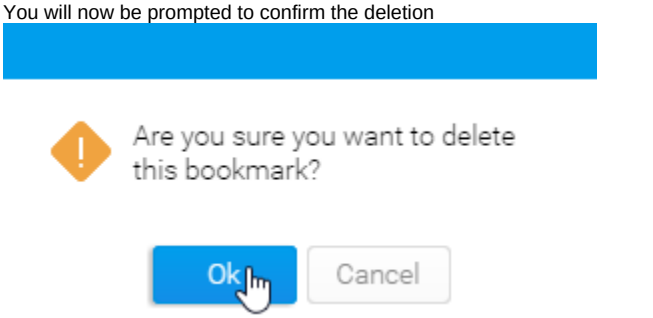
1. Locate and open the report it is based on
2. Click on the Bookmark button on the left navigation panel



3. Click on the delete button next to the bookmark you wish to remove



4. You will now be prompted to confirm the deletion



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