

Report Annotation

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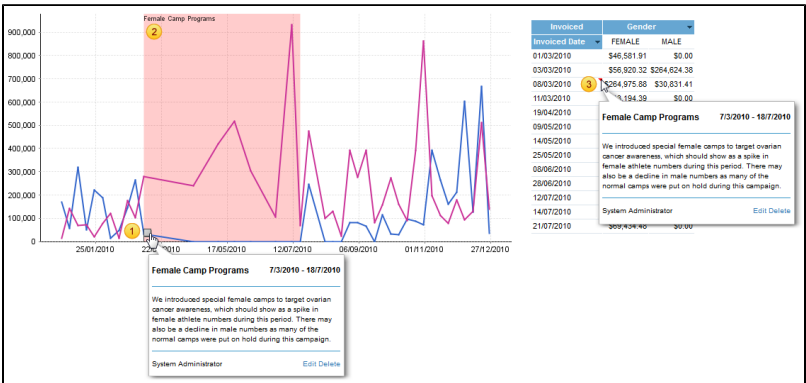
Overview

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With Yellowfin you can add specific comments to your reports in the form of annotations. There are three types of annotations to assist users of a report:

- Report Level Annotations
- View Level Annotations
- Organisation Level Annotations

Annotations assist your reports readers to understand the reports and data that they are viewing. They can only be added when a report is ACTIVE and the annotate drop down menu is visible.



The figure above shows the three places annotations are displayed.

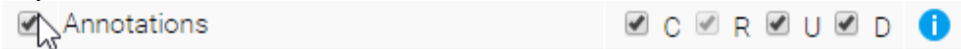
1. Annotation Flag highlighting the date, or start of date range, on the time series x axis, with a descriptive roll over that is editable from the report page.
Note: if the Annotation is set to Private the flag will be coloured red.
2. Highlighting on a time series chart when the annotation has been applied to a date range rather than a single date.
3. A descriptive roll over on the table displayed on the date, or start of the date range, that is editable from the report page.

Enabling Annotations

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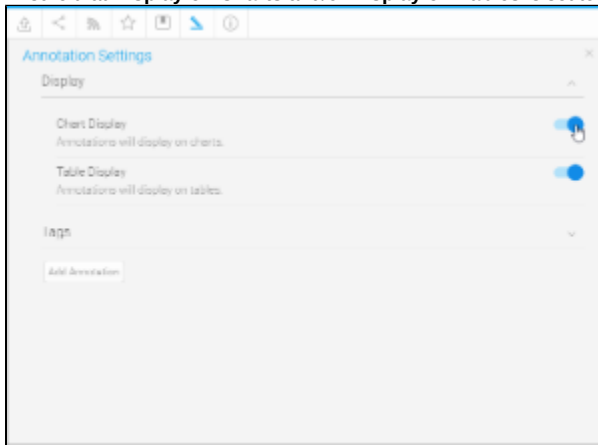
There are two things you must do in order to use annotations in Yellowfin;

1. You must get an administrator to enable annotation permissions for our role. There are *C*reate, *R*ead, *U*pdate, and *D*elete options available.
 - a. The administrator should go to **Administration > Role Management** and edit your role
 - b. They will need to ensure the **Annotations** role is enabled



2. The report you wish to view annotations on must be correctly enabled
 - a. While the report is in draft mode, open the Display menu

- b. Ensure that **Display on Charts** and/or **Display on Tables** is set to **Yes**



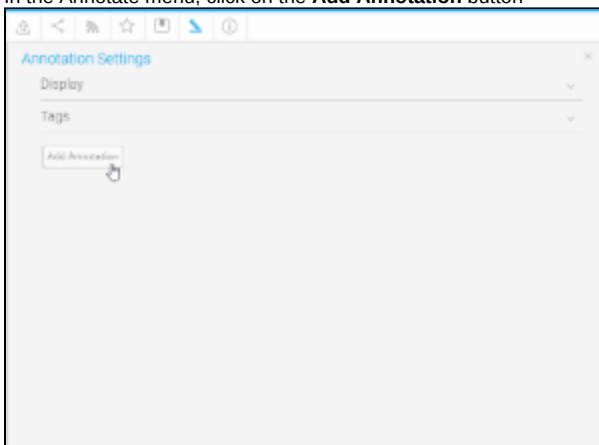
- c. Activate the report

Creating Annotations

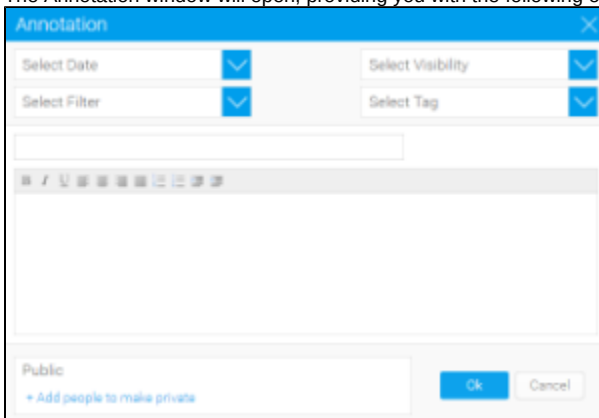
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In order to create annotations you will need to complete the following:

1. Ensure your report is Active (not in Draft mode)
2. In the Annotate menu, click on the **Add Annotation** button

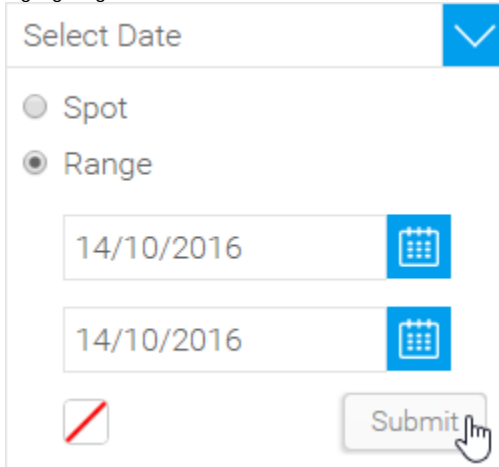


3. The Annotation window will open, providing you with the following options:



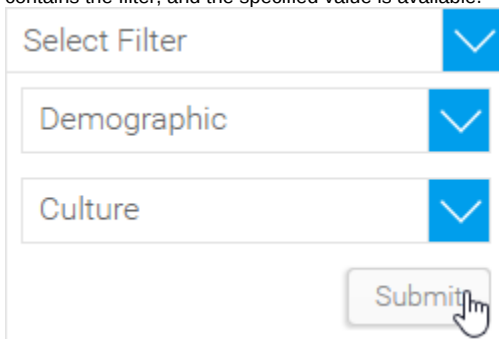
Date

Nominate the date, or date range that your annotation should be displayed for. If a date range is selected, you will also be able to choose a colour for chart highlighting.



Filter

The optional Filter setting allows you to associate the Annotation with a filter value. This results in the Annotation only being available if the report viewed contains the filter, and the specified value is available.



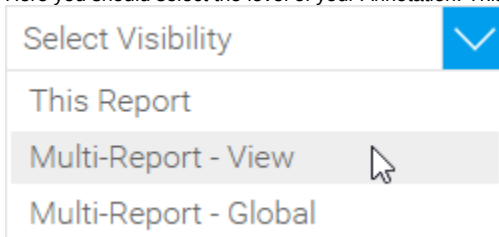
In order to link your Annotation to a filter value, you will need to complete the following:

1. Add the required filter to your report, ensuring that it is:
 - a. User Prompt
 - b. Cached
2. Select the Filter from the first drop down list in the Annotation window
3. Select the desired value from the second drop down list in the Annotation window

Note: if you apply a Filter link to your Annotation, the Visibility options will be reduced to Report and View. This is because the filter is linked to a view field and as such cannot be applied to reports based on other views.

Visibility

Here you should select the level of your Annotation. This will restrict what content it can appear on. There are three levels available:



1. **This Report (Report Level):** These annotations are only attached to a single report. Any date that falls on the specified date, or within the range, will be annotated.

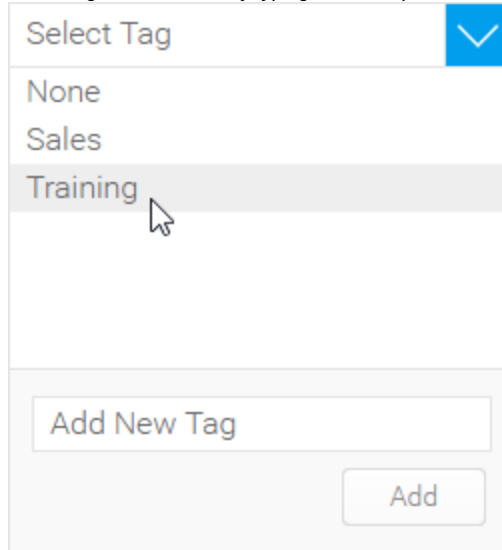
2. **Multi-Report - View (View Level):** Any annotation applied to the view level will be displayed on all reports written off the selected view. This is where tags become more important. For example, if you add an annotation about an invoicing system you should apply a tag, such as 'Invoicing'. This will allow you to hide the annotation when you are viewing a report about Date of Births, where invoicing is irrelevant.
3. **Multi-Report – Global (Organisation Level):** 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. Again, tagging is important here, as you are dealing with a wide range of reports.

Note: If the Annotation is linked to a filter, the Global (Organisation) level will not be available, as the filter is linked to a view field and as such cannot be applied to reports based on other views.

Tag

Specify a tag to categorise your Annotation. This can be left blank, but it's suggested that tags are used where possible in order to make it easier for the users to view content relevant to them.

A new tag can be added by typing the description of the tag in the text box at the bottom of the list and clicking Add.



Select Tag

None

Sales

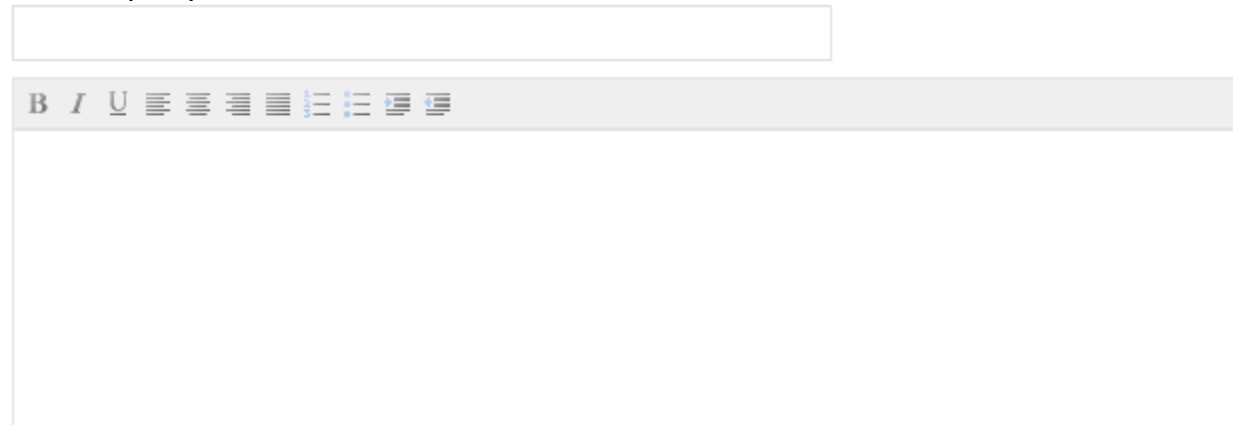
Training

Add New Tag

Add

Title & Description

Enter the Subject of your Annotation and details about the event or data.



B I U [List Icons]

Security

Annotations are set to Public by default. In order to restrict visibility of the annotation, complete the following:

1. Click on the + Add people to make private link

2. From here you are able to search through Yellowfin users & groups. Enter a search term in order to locate a user or group allowed to view the annotation. You will notice that groups have this symbol next to them.

Public

+ Add people to make private

te

Teresa Pringle

Did you mean:

Bill David

All

People Only

Groups Only

+ Add users to the Access List

3. Click the user/group you wish to add and continue until you have all the users required. Note: the creator of the annotation will always have permission to view it, and will be added by the system automatically.

Note: Annotations will always be secured by Client Org (if implemented), so even if set to Public, only users and groups within the Org it was created in will have access. If your Annotation is Private the flag on a chart will be red, rather than grey.

Viewing Annotations

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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

Annotation Settings

Display

Chart Display
Annotations will display on charts.

Table Display
Annotations will display on tables.

Tags

Add Annotation

3. The Filters used in the Report match those used in the Annotation (if specified)

Global Annotations

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When using the Client Organisations feature in Yellowfin, Administrators of the Primary Org will have the option enable Global Annotations. Enabling this feature means that all Annotations created at the Primary Org (Default Level) will be passed through and visible in all Client Orgs.

To enable this, the Administrator will have to:

1. Navigate to **Administration > Configuration > Authentication**

2. Under the Client Organisation Functionality, set **Global Annotations** to **Yes**.
3. Save the settings.

Users logged in at the Client Org level will not be able to Edit or Delete the Global Annotations. They will, however, be able to display or hide them through the same display settings as their own Client Annotations.

Note: when Global Annotations are enabled, the Annotations at the Primary Org will be set to Public.

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