

# Create and Share Report Center Bookmarks/Views

This guide provides a step-by-step process for creating and sharing bookmarks/views in the Report Center.

By following these instructions, users can efficiently save and share customized views, promoting collaboration and data accessibility within their teams.

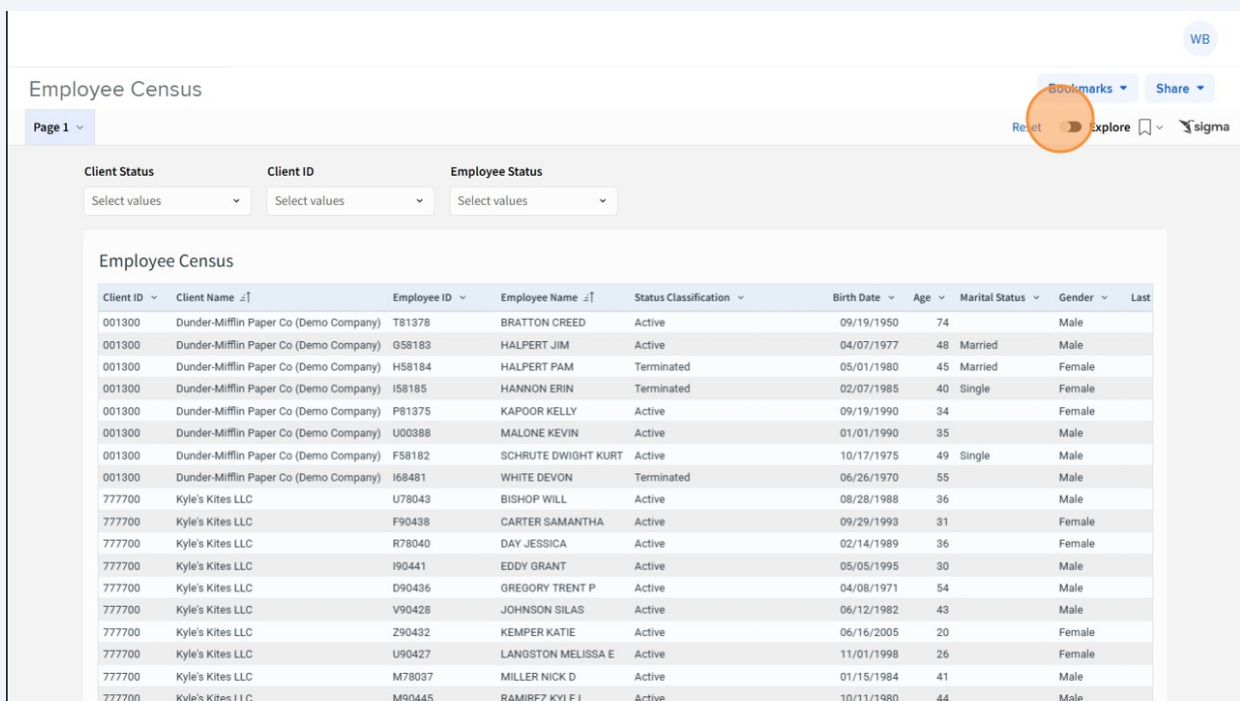
Note: Our reporting partners at PrismHR have made us aware that soon "Bookmarks" will instead be referred to as "Views". For the purposes of this guide, these terms may be used interchangeably.



**NOTE:** The Report Center functionality detailed in this guide requires "Explorer" level access in Report Center.

## Saving a Bookmark

- 1 From within any Report Center Workbook, toggle into "Explore" mode.



Client ID	Client Name	Employee ID	Employee Name	Status Classification	Birth Date	Age	Marital Status	Gender	Last
001300	Dunder-Mifflin Paper Co (Demo Company)	T81378	BRATTON CREED	Active	09/19/1950	74		Male	
001300	Dunder-Mifflin Paper Co (Demo Company)	G58183	HALPERT JIM	Active	04/07/1977	48	Married	Male	
001300	Dunder-Mifflin Paper Co (Demo Company)	H58184	HALPERT PAM	Terminated	05/01/1980	45	Married	Female	
001300	Dunder-Mifflin Paper Co (Demo Company)	I58185	HANNON ERIN	Terminated	02/07/1985	40	Single	Female	
001300	Dunder-Mifflin Paper Co (Demo Company)	P81375	KAPOOR KELLY	Active	09/19/1990	34		Female	
001300	Dunder-Mifflin Paper Co (Demo Company)	U00388	MALONE KEVIN	Active	01/01/1990	35		Male	
001300	Dunder-Mifflin Paper Co (Demo Company)	F58182	SCHRUTE DWIGHT KURT	Active	10/17/1975	49	Single	Male	
001300	Dunder-Mifflin Paper Co (Demo Company)	I68481	WHITE DEVON	Terminated	06/26/1970	55		Male	
777700	Kyle's Kites LLC	U78043	BISHOP WILL	Active	08/28/1988	36		Male	
777700	Kyle's Kites LLC	F90438	CARTER SAMANTHA	Active	09/29/1993	31		Female	
777700	Kyle's Kites LLC	R78040	DAY JESSICA	Active	02/14/1989	36		Female	
777700	Kyle's Kites LLC	I90441	EDDY GRANT	Active	05/05/1995	30		Male	
777700	Kyle's Kites LLC	D90436	GREGORY TRENT P	Active	04/08/1971	54		Male	
777700	Kyle's Kites LLC	V90428	JOHNSON SILAS	Active	06/12/1982	43		Male	
777700	Kyle's Kites LLC	Z90432	KEMPER KATIE	Active	06/16/2005	20		Female	
777700	Kyle's Kites LLC	U90427	LANGSTON MELISSA E	Active	11/01/1998	26		Female	
777700	Kyle's Kites LLC	M78037	MILLER NICK D	Active	01/15/1984	41		Male	
777700	Kyle's Kites LLC	M90445	RAMIREZ KYLE L	Active	10/11/1980	44		Male	

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Make as many changes as desired in the Workbook. In this case, we have added a "Pay Group" column.

The screenshot shows the Tableau interface for a workbook named 'Employee Census'. The main view displays a table with columns: Age, Marital Status, Gender, Last Hire Date, Original Hire Date, Termination Date, and Annual Pay Rate. A 'Source columns' dialog box is open, listing various columns from the data source. The 'Pay Group' column is highlighted with an orange circle, indicating it is being added to the visualization. The right sidebar shows the 'Columns' and 'Metrics' tabs, with 'Columns' selected. The 'Columns' tab lists various fields like Client ID, Client Name, Employee ID, etc.

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Once all desired changes have been made, click "Bookmarks".

The screenshot shows the Tableau interface for the 'Employee Census' workbook. The main view displays a table with columns: Age, Marital Status, Gender, Last Hire Date, Original Hire Date, Termination Date, Annual Pay Rate, Location Home, and Pay Group. The 'Pay Group' column is now visible in the table. The 'Bookmarks' button in the top right corner is highlighted with an orange circle, indicating it is the next step in the process. The right sidebar shows the 'Columns' and 'Metrics' tabs, with 'Columns' selected. The 'Columns' tab lists various fields like Client ID, Client Name, Employee ID, etc.

#### 4 Click "Save as New Bookmark"

The screenshot shows the 'Employee Census' dashboard. A 'Bookmarks' dropdown menu is open, and the option 'Save as New Bookmark' is highlighted with an orange circle. The dashboard displays a table with columns: Age, Marital Status, Gender, Last Hire Date, Original Hire Date, Termination Date, Annual Pay Rate, Location Home, and Pay Group. The table contains 20 rows of employee data.

Age	Marital Status	Gender	Last Hire Date	Original Hire Date	Termination Date	Annual Pay Rate	Location Home	Pay Group
74		Male	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
48	Married	Male	04/01/2004	04/01/2004	null	\$39,000.00	MAIN	Biweekly
45	Married	Female	01/01/2006	01/01/2006	04/05/2023	\$41,000.00	MAIN	Biweekly
40	Single	Female	02/23/2022	05/01/2009	09/12/2022	\$26,000.00	MAIN	Biweekly
34		Female	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
35		Male	01/01/2025	01/01/2025	null	\$36,000.00	MAIN	Biweekly
49	Single	Male	09/15/2002	09/15/2002	null	\$41,600.00	MAIN	Biweekly
55		Male	08/01/2004	08/01/2004	10/18/2005	\$40,000.00	MAIN	Biweekly
36		Male	05/18/2023	05/18/2023	null	\$46,800.00	Van Buren, AR	WEEKLY
31		Female	04/03/2024	04/03/2024	null	\$37,440.00	Van Buren, AR	WEEKLY
36		Female	05/18/2023	05/18/2023	null	\$24,960.00	Van Buren, AR	WEEKLY
30		Male	01/08/2024	01/08/2024	null	\$28,080.00	Van Buren, AR	WEEKLY
54		Male	06/08/2023	06/08/2023	null	\$27,040.00	Van Buren, AR	WEEKLY
43		Male	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
20		Female	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
26		Female	06/17/2024	06/17/2024	null	\$39,520.00	Little Rock, AR	WEEKLY
41		Male	01/19/2024	05/18/2023	null	\$93,600.00	Van Buren, AR	WFFKLY

#### 5 In the "Name" field, type the desired name of your Bookmark.

The screenshot shows the 'Employee Census' dashboard with a 'Save New Bookmark' dialog box open. The 'Name' field is filled with 'Employee Census with Home Location & Pay Group'. The dialog box also has a 'Set as my default bookmark' checkbox and 'Cancel' and 'Save' buttons. The background dashboard is dimmed.

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Optional: If you prefer to view this new version of the workbook (i.e. "bookmark") every time you open the original workbook, check the "Set as my default bookmark" checkbox.

Save New Bookmark

Name  
Employee Census with Home Location & Pay Group

Set as my default bookmark

Cancel Save

Age	Marital Status	Gender	Last Hire Date	Original Hire Date	Termination Date	Annual Pay Rate	Location Home	Pay Group
74		Male	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
48	Married	Male	04/01/2004	04/01/2004	null	\$39,000.00	MAIN	Biweekly
45	Married	Female	01/01/2006	01/01/2006	04/05/2023	\$41,000.00	MAIN	Biweekly
40	Single	Female	02/23/2022	05/01/2009	09/12/2022	\$26,000.00	MAIN	Biweekly
34		Female	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
35		Male	01/01/2025	01/01/2025	null	\$36,000.00	MAIN	Biweekly
49	Single	Male	09/15/2002	09/15/2002	null	\$41,600.00	MAIN	Biweekly
55		Male	08/01/2004	08/01/2004	10/18/2005	\$40,000.00	MAIN	Biweekly
36		Male	05/18/2023	05/18/2023	null	\$46,800.00	Van Buren, AR	WEEKLY
31		Female	04/03/2024	04/03/2024	null	\$37,440.00	Van Buren, AR	WEEKLY
36		Female	05/18/2023	05/18/2023	null	\$24,960.00	Van Buren, AR	WEEKLY
30		Male	01/08/2024	01/08/2024	null	\$28,080.00	Van Buren, AR	WEEKLY
54		Male	06/08/2023	06/08/2023	null	\$27,040.00	Van Buren, AR	WEEKLY
43		Male	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
20		Female	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
26		Female	06/17/2024	06/17/2024	null	\$39,520.00	Little Rock, AR	WEEKLY
41		Male	01/19/2024	05/18/2023	null	\$83,600.00	Van Buren, AR	WEEKLY

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Click "Save"

Save New Bookmark

Name  
Employee Census with Home Location & Pay Group

Set as my default bookmark

Cancel Save

Age	Marital Status	Gender	Last Hire Date	Original Hire Date	Termination Date	Annual Pay Rate	Location Home	Pay Group
74		Male	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
48	Married	Male	04/01/2004	04/01/2004	null	\$39,000.00	MAIN	Biweekly
45	Married	Female	01/01/2006	01/01/2006	04/05/2023	\$41,000.00	MAIN	Biweekly
40	Single	Female	02/23/2022	05/01/2009	09/12/2022	\$26,000.00	MAIN	Biweekly
34		Female	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
35		Male	01/01/2025	01/01/2025	null	\$36,000.00	MAIN	Biweekly
49	Single	Male	09/15/2002	09/15/2002	null	\$41,600.00	MAIN	Biweekly
55		Male	08/01/2004	08/01/2004	10/18/2005	\$40,000.00	MAIN	Biweekly
36		Male	05/18/2023	05/18/2023	null	\$46,800.00	Van Buren, AR	WEEKLY
31		Female	04/03/2024	04/03/2024	null	\$37,440.00	Van Buren, AR	WEEKLY
36		Female	05/18/2023	05/18/2023	null	\$24,960.00	Van Buren, AR	WEEKLY
30		Male	01/08/2024	01/08/2024	null	\$28,080.00	Van Buren, AR	WEEKLY
54		Male	06/08/2023	06/08/2023	null	\$27,040.00	Van Buren, AR	WEEKLY
43		Male	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
20		Female	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
26		Female	06/17/2024	06/17/2024	null	\$39,520.00	Little Rock, AR	WEEKLY
41		Male	01/19/2024	05/18/2023	null	\$83,600.00	Van Buren, AR	WEEKLY

# Sharing a Bookmark with Teammates

8 Follow the steps below to share this bookmark with a teammate who has access to Report Center.

9 Within the Bookmark view, click "Share".

The screenshot displays the 'Employee Census' report interface. At the top right, there is a 'Bookmarks' dropdown menu with a 'Share' button highlighted in orange. The main content area shows a table with columns for Client Status, Client ID, Employee Status, Age, Marital Status, Gender, Last Hire Date, Original Hire Date, Termination Date, Annual Pay Rate, Location Home, and Pay Group. The table contains 20 rows of employee data. On the right side, there is a 'Properties' panel with 'GROUPINGS' and 'Columns' tabs, and a 'Metrics' section.

Age	Marital Status	Gender	Last Hire Date	Original Hire Date	Termination Date	Annual Pay Rate	Location Home	Pay Group
74		Male	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
48	Married	Male	04/01/2004	04/01/2004	null	\$39,000.00	MAIN	Biweekly
45	Married	Female	01/01/2006	01/01/2006	04/05/2023	\$41,000.00	MAIN	Biweekly
40	Single	Female	02/23/2022	05/01/2009	09/12/2022	\$26,000.00	MAIN	Biweekly
34		Female	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
35		Male	01/01/2025	01/01/2025	null	\$36,000.00	MAIN	Biweekly
49	Single	Male	09/15/2002	09/15/2002	null	\$41,600.00	MAIN	Biweekly
55		Male	08/01/2004	08/01/2004	10/18/2005	\$40,000.00	MAIN	Biweekly
36		Male	05/18/2023	05/18/2023	null	\$46,800.00	Van Buren, AR	WEEKLY
31		Female	04/03/2024	04/03/2024	null	\$37,440.00	Van Buren, AR	WEEKLY
36		Female	05/18/2023	05/18/2023	null	\$24,960.00	Van Buren, AR	WEEKLY
30		Male	01/08/2024	01/08/2024	null	\$28,080.00	Van Buren, AR	WEEKLY
54		Male	06/08/2023	06/08/2023	null	\$27,040.00	Van Buren, AR	WEEKLY
43		Male	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
20		Female	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
26		Female	06/17/2024	06/17/2024	null	\$39,520.00	Little Rock, AR	WEEKLY
41		Male	01/19/2024	05/18/2023	null	\$93,600.00	Van Buren, AR	WEEKLY

10 To share the bookmark you have open, click "Current Bookmark".

The screenshot shows a Power BI workspace titled "Employee Census / Employee Census with Home Location & Pay Group". The main area contains a table with the following columns: Age, Marital Status, Gender, Last Hire Date, Original Hire Date, Termination Date, Annual Pay Rate, Location Home, and Pay Group. The table contains 20 rows of employee data. In the top right corner, there is a "Bookmarks" dropdown menu with "Current Bookmark" highlighted. Other UI elements include "Page 1", a search bar with "[EMPLOYEE/Pay Group]", and a "Properties Format Actions" panel on the right.

Age	Marital Status	Gender	Last Hire Date	Original Hire Date	Termination Date	Annual Pay Rate	Location Home	Pay Group
74		Male	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
48	Married	Male	04/01/2004	04/01/2004	null	\$39,000.00	MAIN	Biweekly
45	Married	Female	01/01/2006	01/01/2006	04/05/2023	\$41,000.00	MAIN	Biweekly
40	Single	Female	02/23/2022	05/01/2009	09/12/2022	\$26,000.00	MAIN	Biweekly
34		Female	08/01/2023	08/01/2023	null	\$22,880.00	MAIN	Biweekly
35		Male	01/01/2025	01/01/2025	null	\$36,000.00	MAIN	Biweekly
49	Single	Male	09/15/2002	09/15/2002	null	\$41,600.00	MAIN	Biweekly
55		Male	08/01/2004	08/01/2004	10/18/2005	\$40,000.00	MAIN	Biweekly
36		Male	05/18/2023	05/18/2023	null	\$46,800.00	Van Buren, AR	WEEKLY
31		Female	04/03/2024	04/03/2024	null	\$37,440.00	Van Buren, AR	WEEKLY
36		Female	05/18/2023	05/18/2023	null	\$24,960.00	Van Buren, AR	WEEKLY
30		Male	01/08/2024	01/08/2024	null	\$28,080.00	Van Buren, AR	WEEKLY
54		Male	06/08/2023	06/08/2023	null	\$27,040.00	Van Buren, AR	WEEKLY
43		Male	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
20		Female	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY
26		Female	06/17/2024	06/17/2024	null	\$39,520.00	Little Rock, AR	WEEKLY
41		Male	01/19/2024	05/18/2023	null	\$93,600.00	Van Buren, AR	WEEKLY

11 Click in the "Select users to add" field.

The screenshot shows the same Power BI workspace as above, but with a "Share Bookmark Access" dialog box open. The dialog box has a title bar with a close button (X). Below the title bar, it says "A user must have access to this workbook in order to see any of its bookmarks." There is a "Select users to add" dropdown menu with a search icon and a "Share" button. Below this is a search bar with a magnifying glass icon. The main part of the dialog is a table with the following columns: Name, User or Role, Type, and License Type. The table contains one row: Winston Bishop (wbishop@kyleskites.com), User, Worksite Manager, Explorer. At the bottom of the dialog, there are "Cancel" and "Save" buttons.

Name	User or Role	Type	License Type
Winston Bishop (wbishop@kyleskites.com)	User	Worksite Manager	Explorer

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You may select your teammate from the list of available users or you may type your teammate's name in the search bar to find your teammate.

Share Bookmark Access

A user must have access to this workbook in order to see any of its bookmarks.

Select users to add

Search: Kyle Arnold

- Kyle Arnold (kyle@myhrpros.com)
- Test Account - Kyle Arnold (kyle+testaccount@myhrprofessionals.com)

User or Role	Type	License Type
Winston Bishop (wbishop@kyleskites.com)	User	Worksite Manager Explorer

1 of 1 pages (1 item)

Cancel Save



If your teammate's name is not found, that user may not have access to Report Center.

Your Client Advocate will assist you in granting Report Center access to additional users. Please keep in mind that additional monthly user fees will apply.

13 Click the checkbox next to the teammate's name, then click "Save".

A user must have access to this workbook in order to see any of its bookmarks.

Kyle Arnold (kyle@myhrpros.com) Share

Kyle Arnold  
 Test Account - Kyle Arnold (kyle+testaccount@myhrprofessionals.com)

	User or Role	Type	License Type
Winston Bishop (wbishop@kyleskites.com)	User	Worksite Manager	Explorer

1 of 1 pages (1 item)

Cancel Save

Emp	Age	Gender	Original Hire Date	Termination Date	Annual Pay Rate	Client-ID display	EE status class display	Client Status Class	Location Home	Pay Group
36	Male	05/18/2023	05/18/2023	null	\$46,800.00	Van Buren, AR	WEEKLY			
31	Female	04/03/2024	04/03/2024	null	\$37,440.00	Van Buren, AR	WEEKLY			
36	Female	05/18/2023	05/18/2023	null	\$24,960.00	Van Buren, AR	WEEKLY			
30	Male	01/08/2024	01/08/2024	null	\$28,080.00	Van Buren, AR	WEEKLY			
54	Male	06/08/2023	06/08/2023	null	\$27,040.00	Van Buren, AR	WEEKLY			
43	Male	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY			
20	Female	06/17/2024	06/17/2024	null	\$24,960.00	Little Rock, AR	WEEKLY			
26	Female	06/17/2024	06/17/2024	null	\$39,520.00	Little Rock, AR	WEEKLY			
41	Male	01/19/2024	05/18/2023	null	\$93,600.00	Van Buren, AR	WEEKLY			
44	Male	06/01/20			\$60,000.00	Van Buren, AR	WEEKLY			