

Managing Bookmarks

An upcoming modification to the SAC backend will have an impact on how Bookmarks are managed. At present, Bookmarks can be saved for personal, global or shared use. As of April 14, it will no longer be possible to use the global option when saving.

That may sound like a reason for concern to some users. In this document, we hope to both alleviate any concerns and highlight the advantages this change presents.

Questions and answers regarding this change

I intentionally created my Bookmark with the global attribute so anyone in my department (or any collection of users) can use it. Will that capability be eliminated?

No. You can share a Bookmark with anyone you wish, with the understanding that only employees who have SAP permissions sufficient to run the underlying report will be able to use the Bookmark.

Are there any benefits to me (and my Bookmarks) because of this change?

Absolutely, but it might be easier to understand the benefits by reframing your question and instead consider the primary disadvantage of a global Bookmark: it can be deleted, overwritten or renamed by another user. By contrast, a shared Bookmark offers several advantages:

- You have complete control over who can see or run a Bookmark.
- A shared Bookmark can only be edited or deleted by the person who created it.

How do I share a Bookmark?

The required steps are described [below](#).

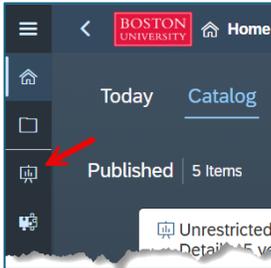
I have already saved several Bookmarks as global. Do I need to modify those Bookmarks?

No. Existing global Bookmarks will not be affected. However, considering the potential advantages of shared versus global Bookmarks outlined previously, you might want to consider changing the settings on those Bookmarks from global to shared. The steps for making that change are outlined in [How to change a Bookmark setting from global to personal or shared](#).

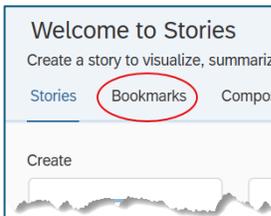
How to share a Bookmark

This example assumes you have already saved the Bookmark you want to share.¹

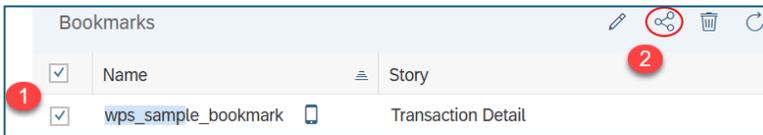
Go to Stories.



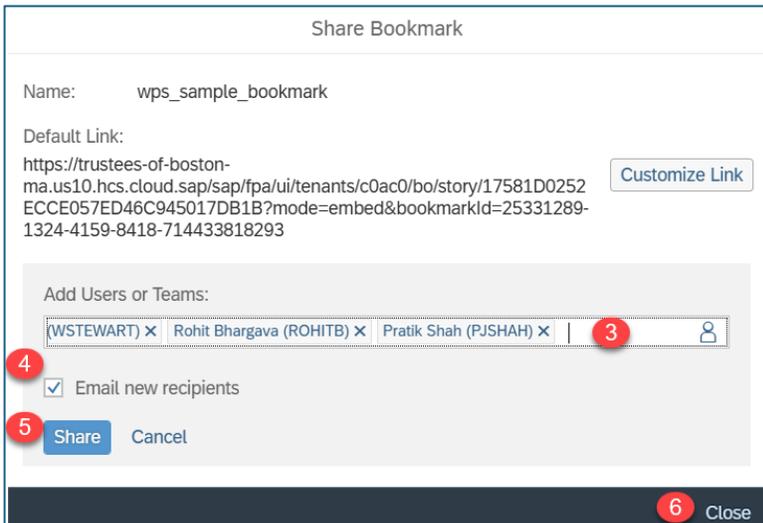
Select the Bookmarks tab.



1. Use the checkbox to select the Bookmark you will share.
2. Click the *Share* icon.



3. Enter the name or email address (“@bu.edu” is not required) of everyone with whom the Bookmark will be shared. Hit Enter after each entry.
4. Choose whether to notify recipients via email.
5. Click **Share**.
6. Click **Close** when done.

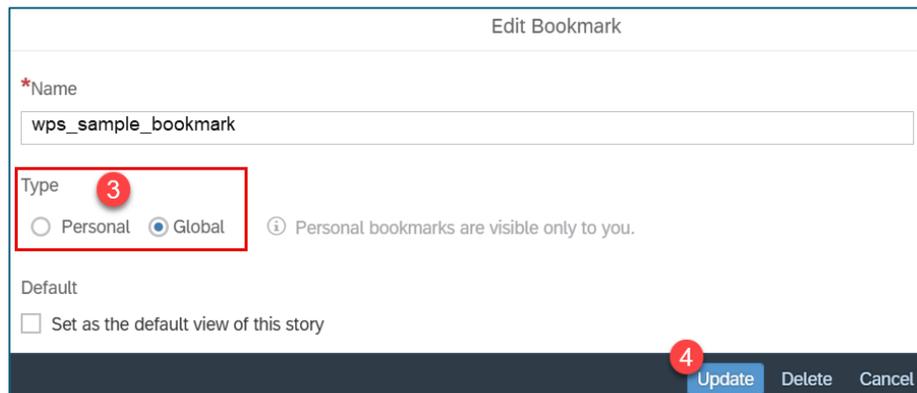
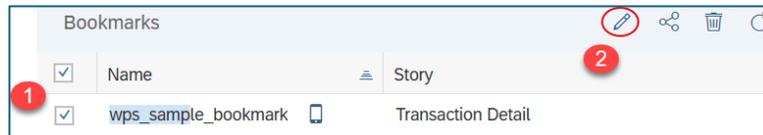


¹ A detailed description of how to save and access/run a Bookmark is provided in this Help Guide: [SAC how to – create, use and manage bookmarks](#).

How to change a Bookmark setting from global to personal or shared

Go to Stories/Bookmarks as described previously.

1. Use the checkbox to select the Bookmark you will share.
2. Click the *Edit* icon.
3. Click the Personal radio button to switch from *Global* to *Personal*.
4. Click **Update**.



If you want to maintain the view as personal, you're done. To share the Bookmark with colleagues, follow the instructions [above](#).