Clarity Data Intelligence: Bookmarks Guide

Bookmarks Overview

In the March 8, 2024 Clarity release, Bookmarks were introduced for all CRT Clarity dashboards. Bookmarks allow a user to save filters and most dropdown selections so that they can be quickly and easily reloaded later, such as saving a specific portfolio of deals or any repeated analysis.

This guide provides a tutorial of using Bookmarks. Please direct any questions to clarity@freddiemac.com

Please note that Bookmarks are dashboard specific. To have the same Bookmark available on more than one dashboard requires you to save it on each dashboard. Once a Bookmark is loaded, the filters will carry as you navigate to other dashboards.

Bookmarks Tutorial

1. Bookmarks can be found in the top left corner of all CRT and Historical dashboards

2. To create your first Bookmark, click on Add New

3. On the resulting screen, enter the name for your Bookmark and click save.

If you already had filters selected, those will be saved as part of the Bookmark. If nothing was selected before creating the Bookmark, you can go ahead and make the filter and dropdown selections that you would like included in the Bookmark and then save changes as shown in the next step. In this example, I create a Bookmark before making filter selections, called 'My Portfolio'.

4. To update the Bookmark, change filters or dropdown selections and then click on the Bookmark ribbon. From there click on the 'Save' icon next to the Bookmark we created. In this example I have filtered for five STACR deals.

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Bookmarks ✏ ✕

MY BOOKMARKS ⊕

My Portfolio
03/06/2024 ✏ 🗑

FILTER ... A3, +3)

Origi... CRT ▾   HISTORICAL ▾

Ch...

View

Monthly ▾

Deal	Issuance UPB	Current UPB	Factor	Loan Count	Rate	OLTV	CLTV	ELTV	FICO	DTI	Inv %
Total	$127,059M	$118,043M	92.9%	383,662	4.40	78	78	69	749	37	7.8%
2024-DNA1	$18,280M	$18,280M	100.0%	59,003	6.41	76	76	72	752	39	11.6%
2023-HQA3	$22,362M	$22,040M	98.6%	62,266	5.38	92	92	86	754	38	0.3%
2023-DNA2	$17,891M	$16,839M	94.1%	52,728	5.43	76	76	71	751	37	15.5%
2022-DNA5	$33,156M	$29,568M	89.2%	101,334	3.20	74	74	62	746	36	8.2%
2022-DNA4	$35,369M	$31,316M	88.5%	108,331	3.12	74	74	62	747	35	6.3%

5. Now we will switch to the Single Variable Stratification ("SVS") dashboard. Notice that, as usual, the filters we had selected will still be applied when moving to a new dashboard. However, when clicking on the Bookmarks icon at the top of the page, there are no saved Bookmarks on this dashboard. That is because Bookmarks are specific to each dashboard.

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Bookmarks ✕

FILTER ... A3, +3)

Origi... CRT ▾   HISTORICAL ▾

Sir...

No Bookmarks

Create bookmarks to save the current view of your entire dossier for easy access any time.

Add New

Colu...   View

FIC...   Monthly ▾

De...		620-639	640-659	660-679	680-699	700-719	720-739
To...		1.01%	2.06%	3.87%	7.09%	9.84%	12.63%
20...		0.85%	1.75%	3.17%	6.63%	9.08%	12.08%
2023-HQA3	0.01%	0.21%	0.65%	1.80%	5.69%	9.47%	14.41%
2023-DNA2	0.08%	1.11%	2.03%	3.70%	6.65%	9.08%	12.04%
2022-DNA5	0.06%	1.34%	2.72%	4.99%	7.89%	10.41%	12.41%
2022-DNA4	0.04%	1.29%	2.64%	4.75%	7.82%	10.42%	12.23%

6. To replicate the same Bookmark on the new dashboard, you could click 'Add New' and then save a new Bookmark. The name could be the same or different. In this example, I name the Bookmark as 'My Portfolio (SVS)'.

7. Now we will create a 2nd Bookmark on the SVS dashboard that looks at the MI Cancellation percentage for high LTV deals. This time we will set the filters first and then create the Bookmark. After filtering for High LTV and then selecting MI Cancel in the 'Columns' dropdown you would then click on the Bookmarks icon and then click on the plus symbol. I named this Bookmark 'MI Cancel'.

8. Now we will adjust this Bookmark to look at only 2018 and 2019 deals. First, we will filter Series Year accordingly and then click the 'Save' icon on the Bookmarks menu. This works because the 'MI Cancel' Bookmark was active.

Notice that the 'My Portfolio (SVS)' Bookmark does not have a 'Save' icon available. To update a Bookmark, you will first want to load it, then make adjustments, and save it. Alternatively, you could always save your selections as a new Bookmark and then delete the old one.

9. One final nuance of using Bookmarks is that if you have an active Bookmark, make changes to filters or selections and then choose to load a different Bookmark without saving the active Bookmark first, you will get a message prompting you to confirm that you want to continue without saving. Clicking continue will load the selected Bookmark. The only changes lost will be those changes made after loading the prior Bookmark (which you probably didn't want to save anyways). If this seems annoying, feel free to check the box next to 'Do not show this again'.

For the example shown, I first loaded the 'My Portfolio (SVS)' Bookmark. Then I changed the 'Columns' dropdown to 'ACE'. Afterwards, when I click on the 'MI Cancel' Bookmark to load it, I get the message asking if I want to continue.

FAQs

Can Bookmarks be viewed by other users? Can I share Bookmarks?

Currently Bookmarks can only be seen and used by the user who creates them. We are looking into enhancements that may allow users to share Bookmarks with others in the future.

I created a Bookmark and now it has disappeared. What happened to it?

The most likely answer is that you created your Bookmark on one dashboard and then navigated to a different dashboard. Bookmarks are dashboard specific and will only appear on the dashboards they are saved on.

Can Bookmarks save dropdown selections in addition to filters?

Yes. In addition to filters, most of the dropdown selections can also be saved.

How long do Bookmarks last? Can they be deleted?

Bookmarks will continue to exist until you decide to delete them. There is a 'Trash' icon to the right of each Bookmark in the menu that can be used to delete Bookmarks.