

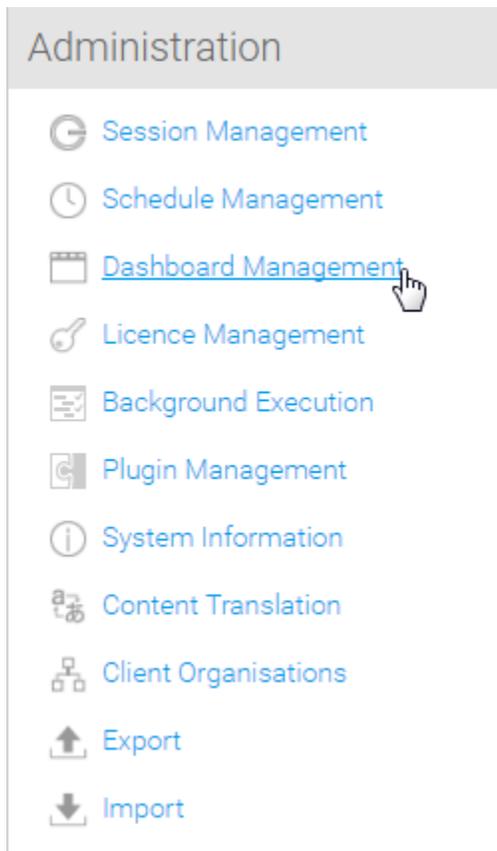
# Dashboard Management

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## Overview

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Yellowfin allows users to create dashboard tabs. Administrators may need to manage the tabs contained in a system, viewing usage information, editing, and deleting them.

To access the Dashboard Management list go to **Administration > Admin Console > Dashboard Management**.



## Dashboard List

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The list of dashboard tabs available in the system can be searched and sorted using functionality at the top. Once you've located the tab you wish to manage you can click on it to explore its components.

Search Dashboards		All Types	All Status	
Dashboards	Reports	Personal Broadcasts	Status	Secure
<input type="checkbox"/>  Analysis	11	3	✓	
<input type="checkbox"/>  Campaign Analysis	7	6	✓	
<input type="checkbox"/>  Drill	6	1	✓	
<input type="checkbox"/>  GIS Maps	4	0	✓	
<input type="checkbox"/>  Google Analytics	10	1	✓	
<input type="checkbox"/>  Monitor	6	0	✓	
<input type="checkbox"/>  Sales Performance	6	6	✓	
<input type="checkbox"/>  Series Selection	3	1	✓	

Select All / Deselect All Delete

## Dashboard Components

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### Dashboard Metadata

When managing individual tabs, you can adjust the standard metadata provided when the tab was built. This includes:

- Name
- Description
- Help Text
- Folder & Sub Folder

<input type="checkbox"/>		Analysis	11	3	✓	
		<input type="text" value="Analysis"/> <span style="float: right;">Open </span>	<p>This is an analytic tab that is used to understand examine metrics split by various demographics and filters.</p> <p>Athlete - explore the different demographics and splits of athletes attending Ski Team camps.</p> <p>Agency - explore the top N agencies and compare benchmarks and their customer information.</p> <p>Marketing - explore the Media Category and Booking Process.</p>			
		<input type="text" value="Tutorial"/> <span style="float: right;">▼</span>	<input type="text" value="Athletes"/> <span style="float: right;">▼</span>			

## Dashboard Access & Subscribers

The security of a tab, and the subscribers associated with it, can be adjusted from this page.

The screenshot shows the 'Dashboard Security' settings. At the top, it indicates the dashboard is currently set to 'Private' (indicated by a blue circle next to the 'Private' label). Below this, there are three summary boxes: 'Last Modified By' showing Teresa Pringle on 21/4/2016 at 1:50 PM; '3 Subscribers' with three user icons; and 'Activity Last 30 Days' showing a bar chart with a value of 7. The main section is titled 'Subscribers' and includes a search bar. It lists three subscribers: Emma Hannig (Yellowfin Consultant) with 'Read' permissions, Mr Administrator (System Admin) with 'Read' permissions, and Teresa Pringle (Product Specialist) with 'Read' permissions. Each subscriber has a small activity bar chart and a dropdown menu for permissions. At the bottom, there is a '+ Add Subscriber' link.

## Access

The security can be toggled between **Public** and **Private**, and when **Private** the permissions of each subscriber can be adjusted between **Read**, **Update**, and **Delete**.

## Subscribers

New subscribers can be added using the [+ Add Subscriber](#) link. Once subscribed, users can be **Deleted** or **Unsubscribed** from this list, where the **Unsubscribe** option is only available if the tab is set to **Private**.

This image shows a close-up of the actions menu for the subscriber 'Teresa Pringle'. The menu is a vertical list with three items: 'Delete' (in a light grey box), 'Unsubscribe' (in a light grey box), and a mouse cursor pointing at the 'Unsubscribe' option.

- **Delete** - this will remove the user from the subscribers list, resulting in the tab being removed from their personal Dashboard. If the tab is **Private**, this will also mean they've been removed from the access list, ensuring they can no longer **Read**, **Update**, or **Delete** the tab.
- **Unsubscribe** - this will remove the users' subscription to the tab, resulting in the tab being removed from their personal Dashboard. They will, however, retain their access to **Read**, **Update**, or **Delete** the tab as defined in the security.  
**Note:** this option is only available when the tab is set to **Private**.

## Dashboard Reports

The reports contained on the tab are available through the Report List.

**Report List**

- Sales Forecast**
- Athlete Spending**  
View athlete invoicing figures by year and demographic.
- Athlete Demographic Spread**  
A bubble scatter that displays the spread of athletes by age, invoiced amount, and demographic.
- Athlete Demographic Breakdown**
- Agency Benchmark**  
Top N Agencies compared to all other Agencies by demographic

From here, individual reports can be deleted from the tab.

**Athlete Spending**

**Delete**

### Delete Dashboard

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One or more dashboard tabs can be deleted at a time from the dashboard list. Selecting a tab using the checkbox next to its name and clicking the Delete button at the bottom of the list will remove it from all users and the system entirely.

Search Dashboards  All Types  All Status

	Dashboards	Reports	Personal Broadcasts	Status	Secure
<input checked="" type="checkbox"/>	Analysis	11	3	✓	
<input type="checkbox"/>	Campaign Analysis	7	6	✓	
<input type="checkbox"/>	Drill	6	1	✓	
<input type="checkbox"/>	GIS Maps	4	0	✓	
<input type="checkbox"/>	Google Analytics	10	1	✓	
<input type="checkbox"/>	Monitor	6	0	✓	
<input type="checkbox"/>	Sales Performance	6	6	✓	
<input type="checkbox"/>	Series Selection	3	1	✓	

Select All / Deselect All **Delete**

You will be asked to confirm the deletion, while shown a list of users currently subscribed to the tab(s).

### Delete Analysis Dashboard

This Dashboard is currently being used by 3 people

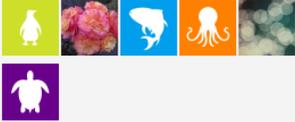


Click Delete to continue.

### Delete multiple dashboard tabs

Campaign Analysis 

This Dashboard is currently being used by 6 people



Analysis

Deleted tabs will be removed from all users dashboards

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