Creating a Tab

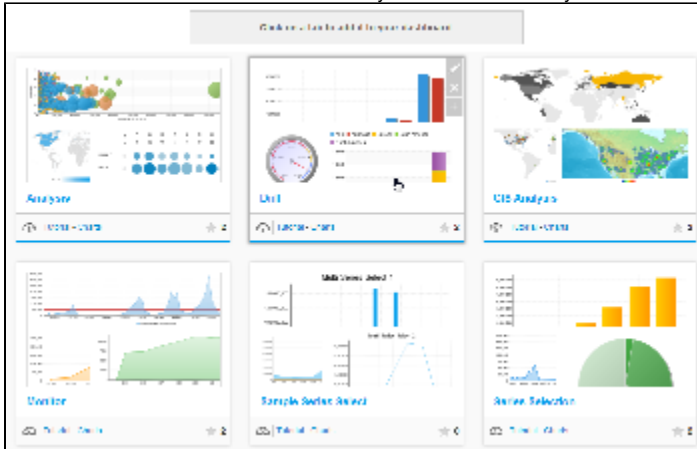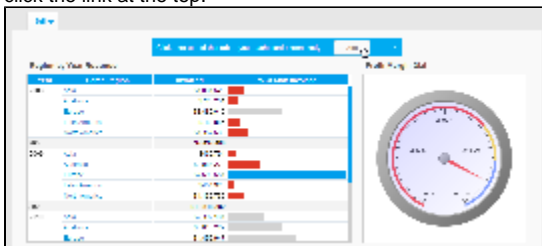## Adding a Pre-Built Tab

top

1. To add a pre-built public tab, click **Create** in the main navigation bar, select **Dashboard Tab** and choose the **Pre-built Tab** option.
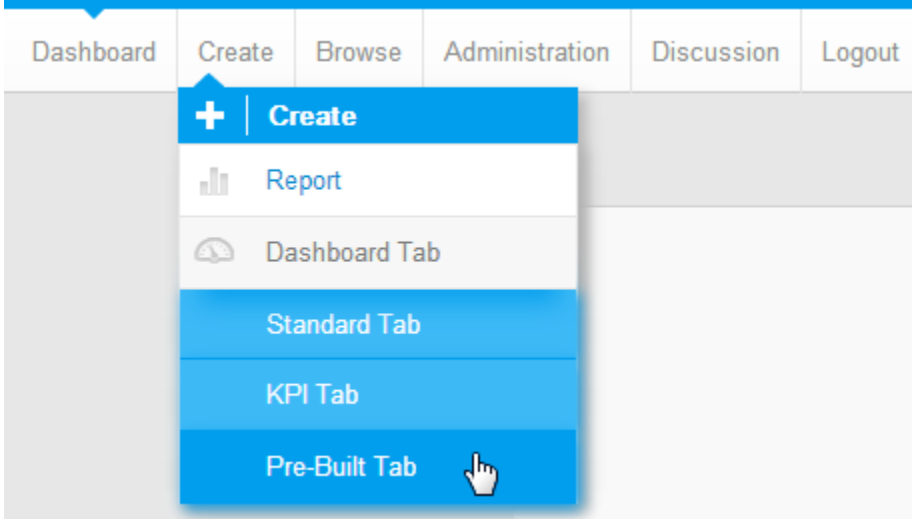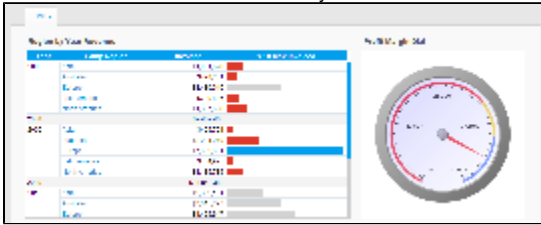

2. You will now see a list of tabs available to you. Click on the tab you wish to add.

3. On selecting a tab you will be returned to the Dashboard and shown a preview of the tab. To confirm you wish to add the tab to your dashboard, click the link at the top.

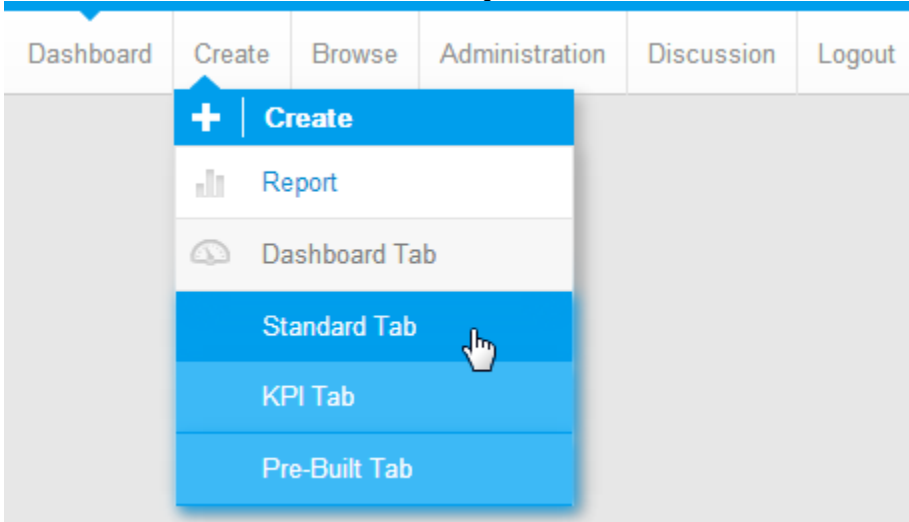4. You will now have added the tab to your Dashboard.

Note: you can only have one instance of a public tab on your dashboard.
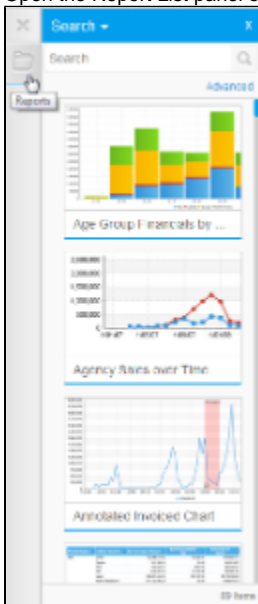
Creating a Standard Tab

1. To build a Standard Tab, click **Create** in the main navigation bar, select **Dashboard Tab** and choose the **Standard Tab** option.
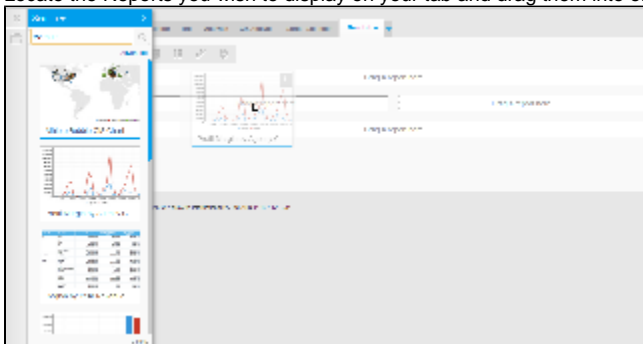

2. You will now see an empty Tab Layout display. From here you will need to locate the reports you wish to display on the tab and drag them onto the template.

Open the Report List panel on the left of the screen.

3. Locate the Reports you wish to display on your tab and drag them into one of the 'Drag a report here' place holders.

4. Add all the reports you wish to display, then close the Report List panel by clicking on the **X** in the top right corner. You will now see your reports displayed in the layout template.

Associated Reports

Dashboard Tabs can also contain links to relevant reports, rather than displaying them fully on the Dashboard Tab, much like Storyboard Slides can contain Associated Content. These reports are generally detailed reports that are too granular or complex for use on a Dashboard, rather providing additional, supporting information related to the Tab content.

In order to add Associated Reports:

1. Locate the report you wish to add through the Report List panel on the left of the screen.

2. Drag the report into the Associated Reports panel on the right of the screen.

Once added, you can view Associated Reports through the default location defined in **Administration** > **Content Settings** > **Dashboard** > **Display Settings** > **Associated Reports Location**

Right	

Left	
Left Side Nav	
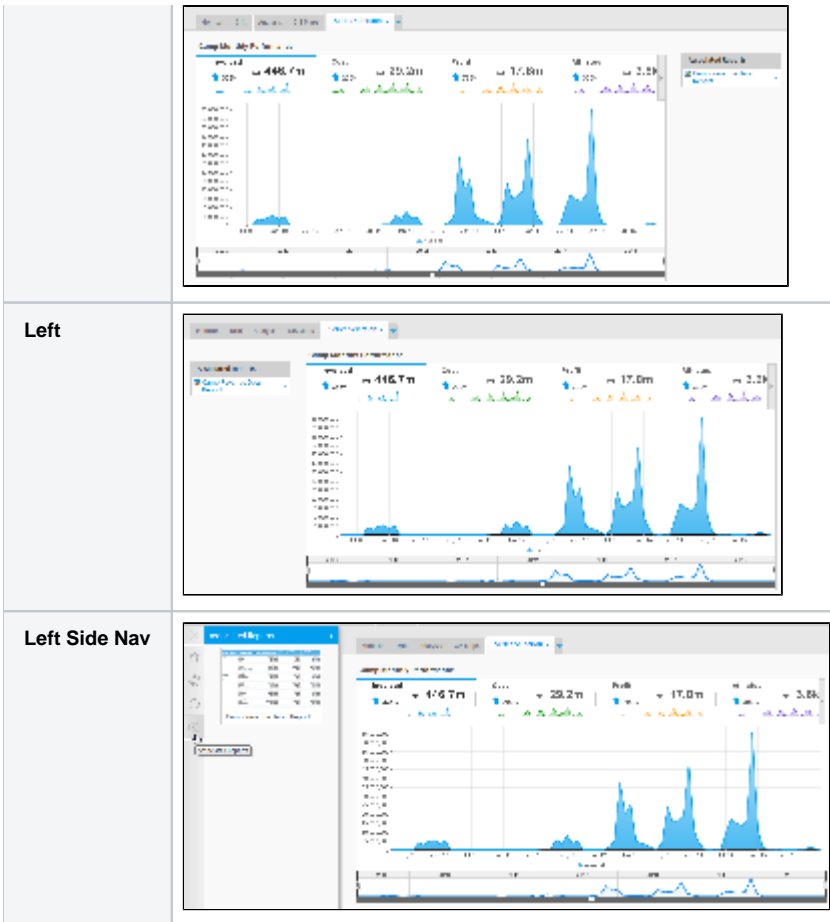
Tab Customisation

From here you are able do several things:

1. Adjust the size and display of your reports.

   See *Report Portlet* for more information.

2. Adjust the layout template of the tab.

   See *Dashboard Layout* for more information.

3. Create Sub Tabs as part of the tab.

   See *Creating Sub Tabs* for more information.

4. Create Analytic Links on the tab.

   See *Analytic Setup* for more information.
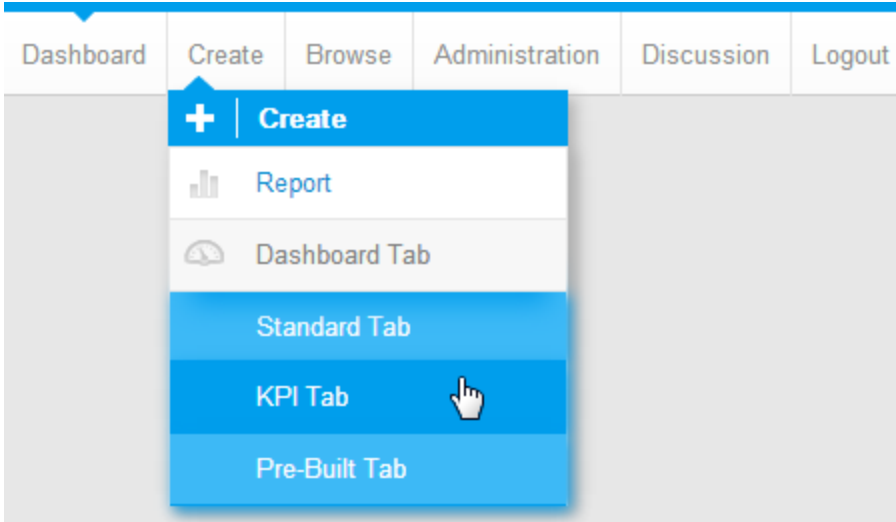
5. Link Series Selection on the tab.

   See *Series Selection Setup* for more information.

Creating a KPI Tab
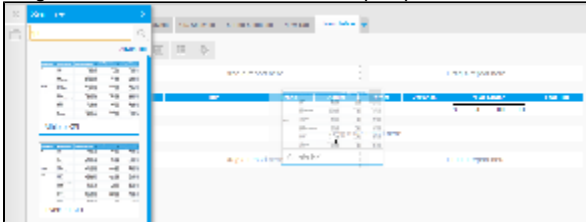
This requires the same process as creating a Standard Tab, with two differences:

1. Select **KPI Tab** from the Create Dashboard Tab menu

2. Drag KPI Formatted tabs into the KPI Report panel in the tab. Standard reports can still be added to all the **Drag a report here** panels.

Creating Sub Tabs

Sub Tabs allow you to split the content of a tab across multiple layouts, while still sharing the same filter sets.

1. Open the **Dashboard Layout** menu and enable **Sub Tabs**

2. Click the **+ Add Subtab** link to create new sub tabs

3. Provide a name and layout option for the sub tab

4. Reorder the sub tabs if required by dragging them in the list on the left