

Dashboard Management

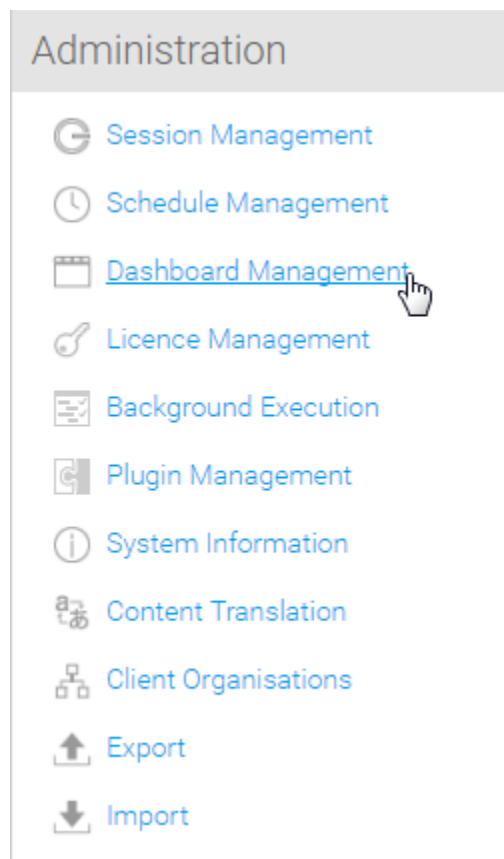
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Overview

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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

Q

All Types

▼

All Status

▼

Dashboards		Reports	Personal Broadcasts	Status	Secure
☐	 Analysis	11	3	✓	
☐	 Campaign Analysis	7	6	✓	
☐	 Drill	6	1	✓	
☐	 GIS Maps	4	0	✓	
☐	 Google Analytics	10	1	✓	
☐	 Monitor	6	0	✓	
☐	 Sales Performance	6	6	✓	
☐	 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

☐		Analysis	11	3	✓	
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Analysis [Open](#) 

This is an analytic tab that is used to understand examine metrics split by various demographics and filters.

Athlete - explore the different demographics and splits of athletes attending Ski Team camps.

Agency - explore the top N agencies and compare benchmarks and their customer information.

Marketing - explore the Media Category and Booking Process.

Tutorial 

Athletes 



Dashboard Access & Subscribers

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

Dashboard Security

All users that have been specified here, and have matching Folder and Role permissions will be able to access this Dashboard Tab.

Public

Private

Last Modified By

Teresa Pringle
21/4/2016, 1:50 PM

3 Subscribers



Activity Last 30 Days

7

Subscribers

Search

Emma Hannig
Yellowfin Consultant



Read

▼

Mr Administrator
System Admin



Read

▼

Teresa Pringle
Product Specialist



Read

▼

+ Add Subscriber

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 subscribe, users can be **Deleted** or **Unsubscribed** from this list, where the **Unsubscribe** option is only available if the tab is set to **Private**.

Teresa Pringle

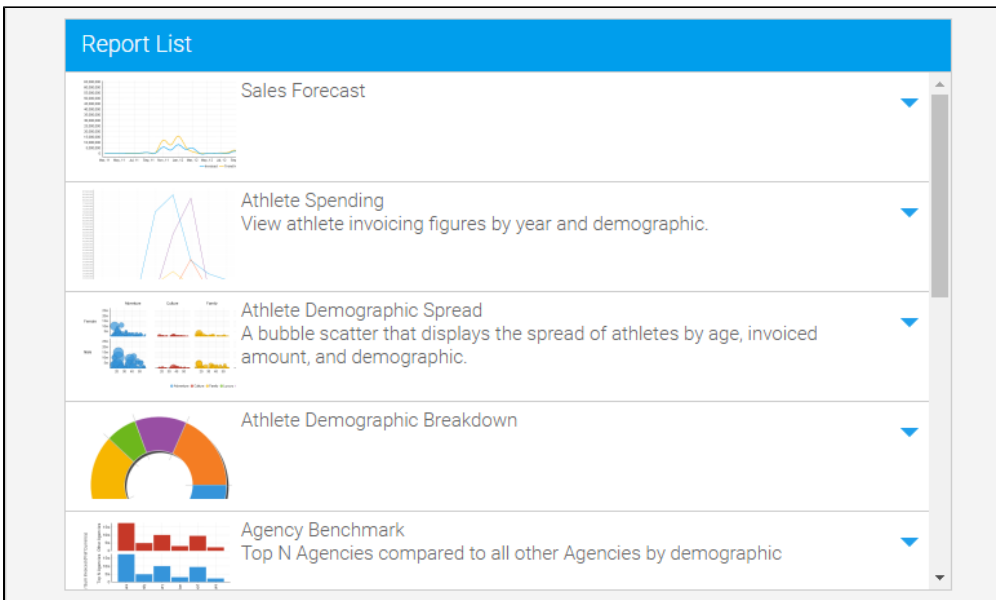
Delete

Unsubscribe 

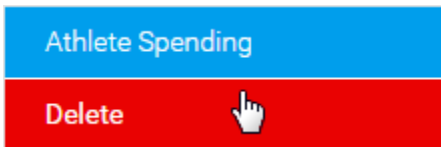
- **Delete** - this will remove the user from the subscribers list, resulting in the tab being removed from their personal Dashboard. If the tab is **Private**, this will also mean they've been removed from the access list, ensuring they can no longer **Read**, **Update**, or **Delete** the tab.
- **Unsubscribe** - 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.



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



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		Q	All Types	▼	All Status	▼
	Dashboards	Reports	Personal Broadcasts	Status	Secure	
☒	Analysis	11	3	✓		
☐	Campaign Analysis	7	6	✓		
☐	Drill	6	1	✓		
☐	GIS Maps	4	0	✓		
☐	Google Analytics	10	1	✓		
☐	Monitor	6	0	✓		
☐	Sales Performance	6	6	✓		
☐	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.

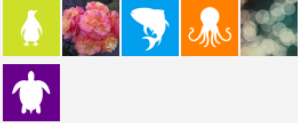
Delete

Cancel

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

Delete

Cancel