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Navigation Styles

There are three styles of menu navigation available in Yellowfin:

Top Toolbar Navigation (Modern)

Left Side Navigation (Legacy)

Top Toolbar Navigation (Legacy)

New installations of Yellowfin will utilize the Modern-style Top Toolbar Navigation.

For compatibility with older versions of Yellowfin, the two Legacy Navigation options will be maintained. Upgrading existing installations of Yellowfin will not affect the previous setting of which style is used.

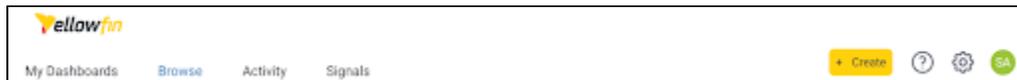
- Left-side Navigation displays all menu options in a collapsible, burger-bun style menu.
- Top Toolbar Navigation - displays the menu options across the top of the page - there are two styles - a modern style and a legacy style for backward compatibility with older installations of Yellowfin.

The navigation style can be altered by an Administrator - changes are reflected for the entire instance. To change the configured option, from the menu select Administration / Configuration / click the System icon / expand General Settings and choose the Navigation Style via the radio buttons.

Top Menu Navigation (Modern)

This new Menu style was introduced in Yellowfin 9.12. It offers a simpler, faster and more intuitive way for Users to navigate their way around Yellowfin.

Menu Components



- **My Dashboards** - Navigates the user to the [Dashboards](#) page where any Dashboards that have been added to "My Dashboards" will be displayed. If no Dashboards have been added, the user can search for and open Dashboards from the Browse Page.
- **Browse** - Navigates the user to the [Browse](#) Page where the user is able to browse all content that they have access to, including Views, Reports, Dashboards, Presentations, Stories, Transformation Flows and Discussions. Users with the appropriate access levels can access various functions for different content items, including modifying settings and deleting content.
- **Activity** - Navigates the User to the [Timeline](#), [Tasks](#) and [Discussions](#) Page.
- **Signals** - Navigates the User to the [Signals](#) Page if Signals is configured for this installation of Yellowfin.
- **+ Create** - When clicked, displays a dropdown menu displaying various content items that can be created depending on the access levels of the user. This includes Natural Language Queries, Data Sources, Views, Reports, Dashboards, Presentations, Stories, Discussion Streams, Tasks and Transformation Flows.
- **? (Help)** - By default, navigates the user to the Yellowfin wiki where they can access help on how to use Yellowfin.
- **Gear icon (Settings)** - When clicked, displays a dropdown menu displaying various [Administration](#) and Configuration options.
- **User Avatar** - The user avatar shows the users profile image or if one does not exist, the users' initials. Clicking on the avatar displays a dropdown menu that allows the user to access their [Profile](#) Settings or Logout.

Note that the user can select their default Entry Page (ie. that page where Yellowfin will navigate to by default after the user logs in) under the Profile Settings. Options include the My Dashboards page, Browse page, Favourites (Browse Page but with Favourited content selected) or Timeline.

Display Preferences ^

Entry Page
When you login you will be directed to this page

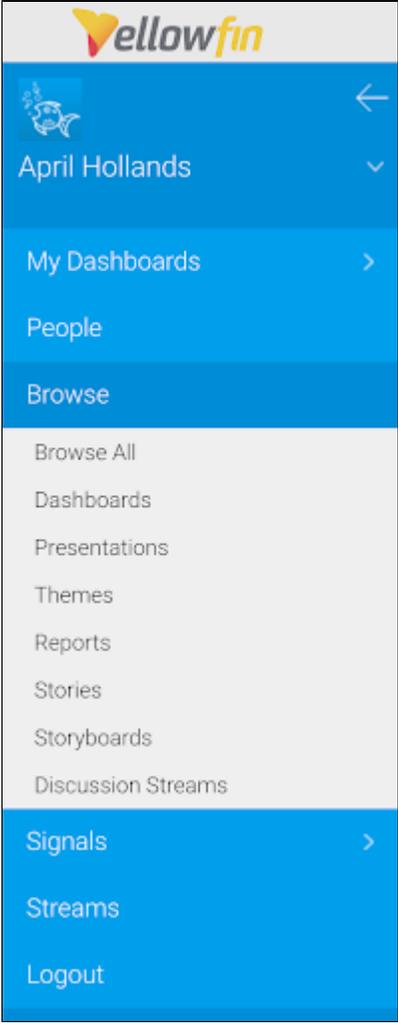
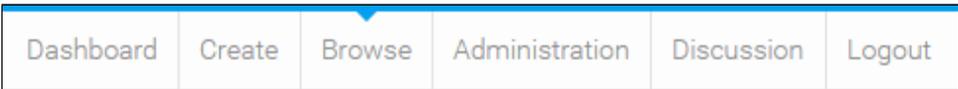
Dashboard

Browse Page

Favourites

Timeline

Legacy Navigation Modes

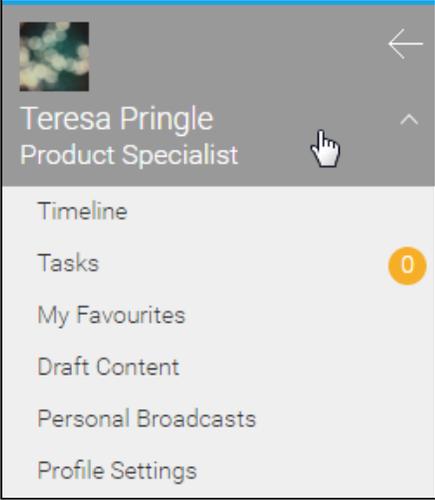
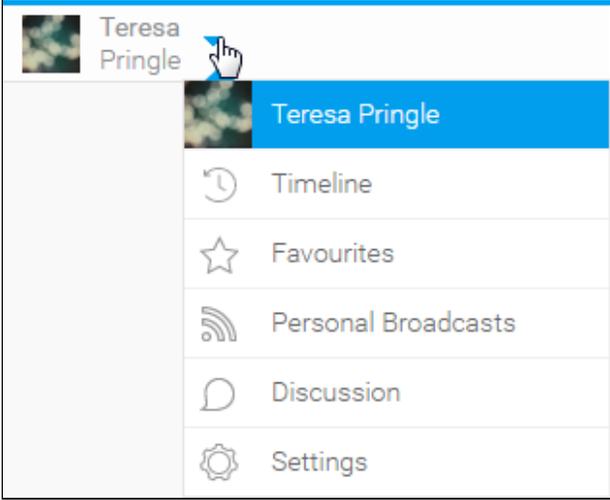
Navigation	Image & Description
Left Side Navigation	 <p>This is the default navigation style.</p> <p>Main system areas are able to be accessed via the collapsible navigation pane on the left of the page, outside of Yellowfin builders such as Report, Stories, Views and Present.</p>
Toolbar Navigation	 <p>This navigation was the default prior to Yellowfin 7.2, and it can still be set to default by your administrator.</p> <p>Main system areas are able to be accessed via the toolbar at the top of the page, outside of Yellowfin builders such as Report, Stories, and Views and Present.</p>

Navigation Components

The menu items available to a user in Yellowfin are defined by the users' level of access. The following sections define all possible menu options; if an option isn't available, the system administrator may need to adjust role permissions to grant the appropriate access.

Timeline option

The Timeline area lets you view Yellowfin activity that's relevant to you. You can adjust your preferences for this within your Yellowfin account, customizing the way they interact with Yellowfin.

Left Side Navigation	Toolbar Navigation
	
<p>This navigation is accessed by clicking on the burger button  in the top left corner of the screen.</p> <p>From there, click on your name to open the timeline settings.</p> <p>This option requires the following settings:</p> <ul style="list-style-type: none"> • Configuration > System > Navigation Style = Left Side Navigation 	<p>This navigation is accessed by clicking on the arrow next to your name in the main navigation bar.</p> <p>From there, the drop-down list shown above is displayed.</p> <p>This option requires the following settings:</p> <ul style="list-style-type: none"> • Configuration > System > Navigation Style = Toolbar Navigation

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Available Functions

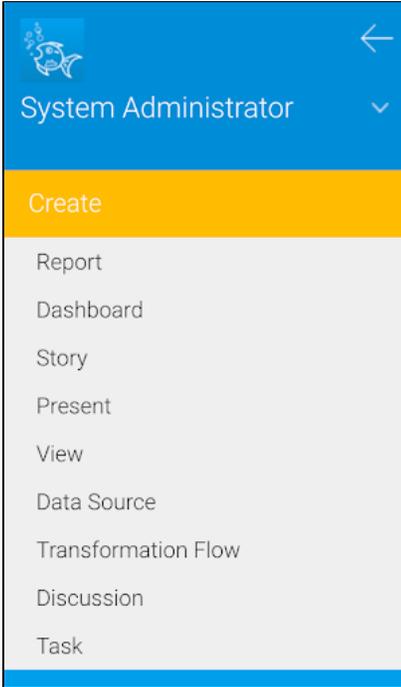
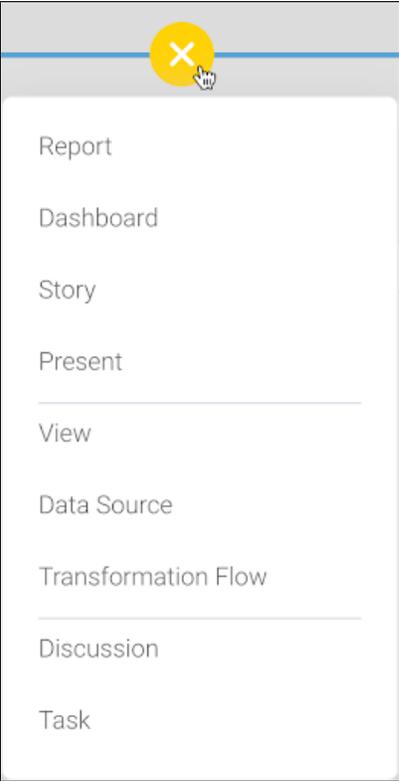
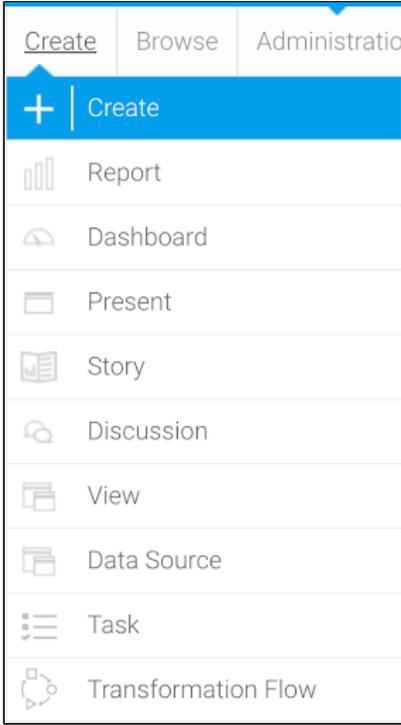
Option	Left Side	Toolbar	Description
Dashboard	✓	✓	Access all the dashboard tabs you have assigned to your dashboard.
List of Tabs	✓	✗	Display a list of each individual tab you have assigned to your dashboard, allowing you to navigate directly to them.
Add Tab	✓	✗	Access the Browse page, view a list of dashboard tabs, and add one to your dashboard.

Create option

The Create option provides access to the various content builders used in the system. The options available to you through this menu are restricted by your role permissions assigned by an administrator. The Create menu is dependent on the navigation style settings defined in Configuration > System. If you use Left Side Navigation, you can choose to position the Content Creation function within the left navigation panel, or as a button on the main navigation bar. If you use the toolbar, the Create link is one of the standard toolbar items.

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Left Side Navigation	Top Right (with Left Side Nav enabled)	Toolbar Navigation
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<p>This option requires the following settings:</p> <ul style="list-style-type: none"> • Configuration > System > Navigation Style = Left Side Navigation • Configuration > System > Content Creation Location = Left Side Navigation 	<p>This option requires the following settings:</p> <ul style="list-style-type: none"> • Configuration > System > Navigation Style = Left Side Navigation • Configuration > System > Content Creation Location = Top Right 	<p>This option requires the following settings:</p> <ul style="list-style-type: none"> • Configuration > System > Navigation Style = Toolbar Navigation

Available Functions

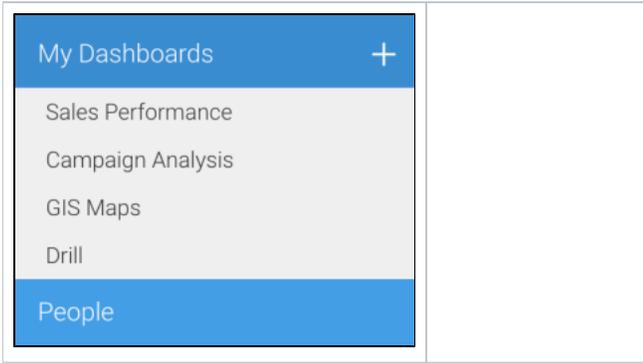
Option	Left Side	Top Right	Toolbar	Description
Report	✓		✓	Open the New Report window where you can define how you want to build your report .
Dashboard	✓	✓	✓	Create a new Dashboard .
Story		✓	✓	Create a new Story .
Present	✓	✓	✓	Create a new presentation using Present .
View	✓	✓	✓	Open the Create New View window where you can build a view using several different builder types.
Data Source	✓	✓	✓	Open the New Connection window where you can set up a new data source connection using several different methods.
Transformation Flow		✓	✓	Create a new data transformation flow to manipulate your data source to what you need.
Discussion	✓	✓	✓	This link will take you to the Create Discussion Stream window where you can set up a new discussion stream .
Task	✓	✓	✓	This will open the New Task window where you can create and assign a task .

Dashboards/My Dashboards option

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The Dashboards/My Dashboards option provides access to all the dashboard tabs you have assigned to your dashboard.

Left Side Navigation	Toolbar Navigation
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Available Functions

Option	Left Side	Toolbar	Description
Dashboard	✓	✓	Access all the dashboard tabs you have assigned to your dashboard.
List of Tabs	✓	✗	Display a list of each individual tab you have assigned to your dashboard, allowing you to navigate directly to them .
Add Tab	✓	✗	Access the Browse page, view a list of dashboard tabs, and add one to your dashboard.

People option

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The People option provides access to all the users you are connected to, as well as their timelines.

Left Side Navigation

Available Functions

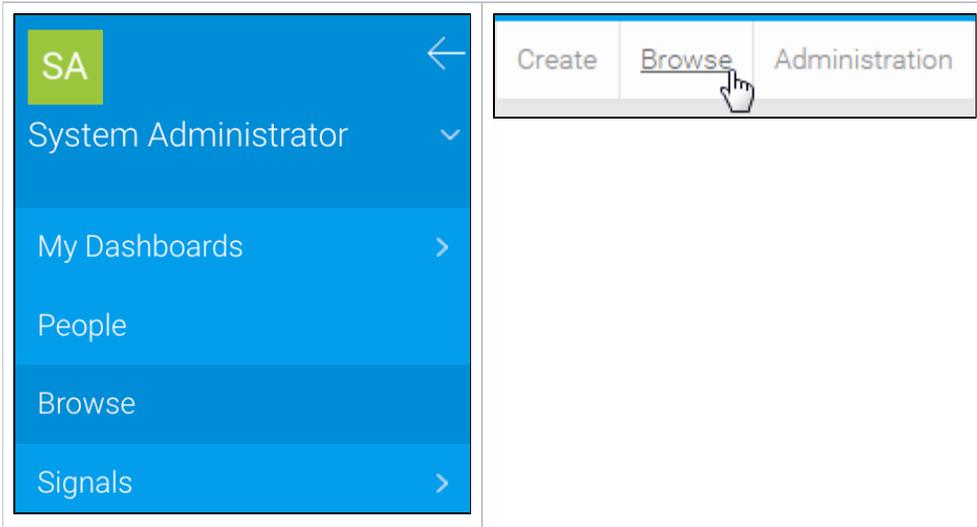
Option	Left Side	Toolbar	Description
List of Connections	✓	✗	This displays a list of all users you are connected to, and access to their timelines.
Add Connection		✗	This allows you to access your own timeline and open the Connections panel in order to locate and add new connections.

Browse option

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The Browse option opens the Browse Page where the user is able to browse all content that they have access to, including Views, Reports, Dashboards, Presentations, Stories, Transformation Flows and Discussions. Users with the appropriate access levels can access various functions for different content items, including modifying settings and deleting content.

Left Side Navigation	Toolbar Navigation



Signals option

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The Signals option provides access to Yellowfin Signals functionality, which can analyse time series data and deliver alerts in realtime.



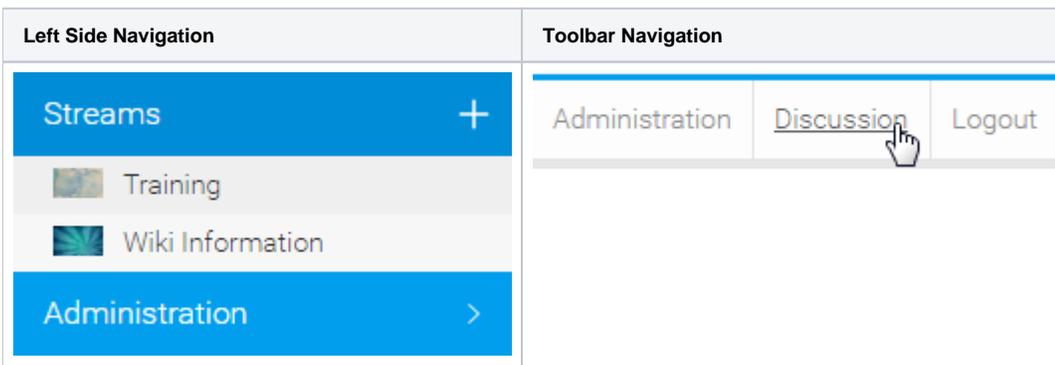
Available Functions

Option	Left Side	Toolbar	Description
Signals Interface	✓	✗	Display the Signals interface to find existing signals or create new analyses, and manage and monitor data.

Streams option

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The Streams option provides access to discussion streams.



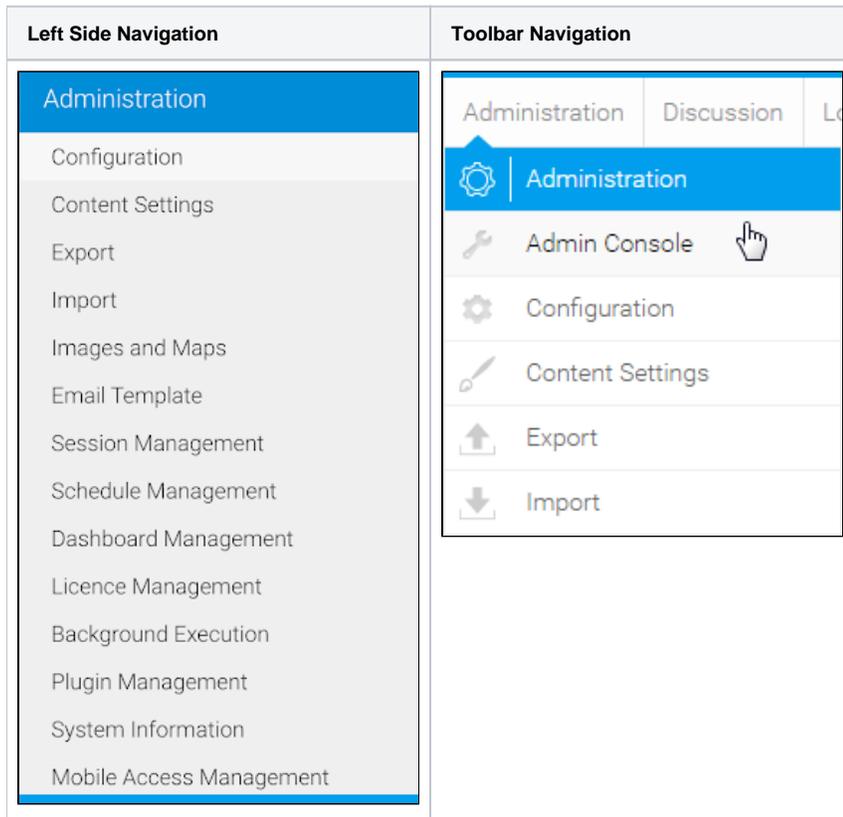
Available Functions

	Left Side	Toolbar	
Discussion Streams	✓	✓	Access all discussion streams that you have access to view.
List of Streams	✓	✗	Display a list of all the streams you have joined, and click on any stream to view its content.
Add Stream	✓	✗	Filter the contents of the Browse page to display discussions only.

Administration option

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The [Administration](#) option provides access to a list of the most commonly-used Administration features. This is only available if you have Administration access.



Available Functions

Option	Left Side	Toolbar	Description
Understanding the Administration Console	✓	✓	Access the main Understanding the Administration Console page, rather than providing a shortcut to one of the main admin components.
Configuration	✓	✓	Customize Yellowfin configuration settings such as authentication, integration (headers, footers, and navigation), page formatting, email server and defaults, system parameters, and regional settings.
Content Settings	✓	✓	Manage the way Yellowfin displays each type of content.
Export	✓	✓	Export selected content to XML file format to use as backups or to transfer to different instances of Yellowfin.
Import	✓	✓	Select an exported XML file to upload to Yellowfin.
Images & Maps	✓	✗	Manage images, raster maps, WMS layers and more stored in the system.
Email Template	✓		Customize the style of automated emails sent from the system.
Session Management	✓	✗	View and manage the system's current sessions.
Schedule Management	✓	✗	View and manage all schedules within the system.
Dashboard Management	✓	✗	View and manage the dashboards within the system.
License Management	✓	✗	View, update, and schedule reminders for your Yellowfin software licence.
Background Execution	✓	✗	Manage current, queued and running report queries.
Plugin Management	✓	✗	Manage all plugins within the system.
System Information	✓	✗	Display technical system information required for maintenance and troubleshooting.
Mobile Access Management	✓	✗	Manage access to the Yellowfin mobile app.
Client Organizations	✓	✗	Create and Manage Client Organizations in Multi Tenant deployments of Yellowfin.

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