# Navigation

## Overview

## Navigation Styles

There are two styles of system navigation available in Yellowfin; Left-side Navigation — for options available via a navigation pane on the left, and Toolbar Navigation — for options available on a horizontal toolbar . The option used within your system is defined by an administrator on the Configuration page.

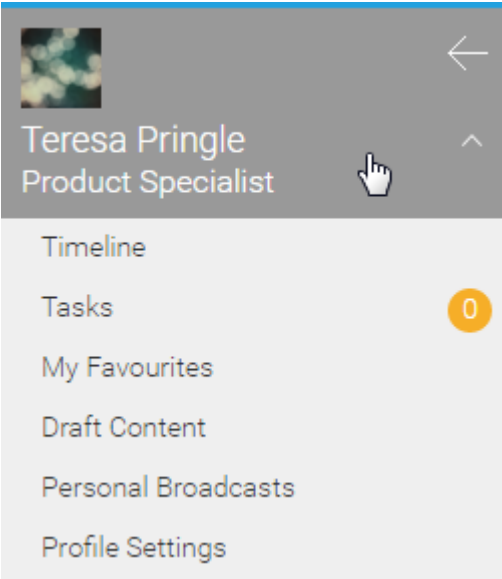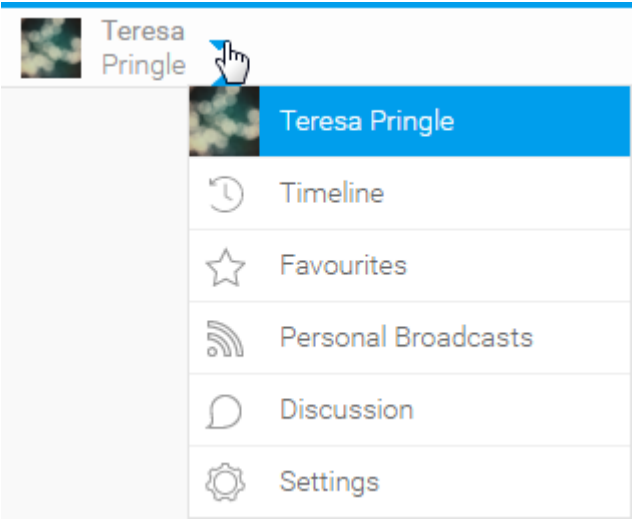| Navigation | Image & Description | |
|---|---|---|
| Left Side Navigation |  | This is the default navigation style.<br><br>Main system areas are able to be accessed via the collapsible navigation pane on the left of the page, outside of Yellowfin builders such as Report, Stories, Views and Present |

| Toolbar Navigation | |
|---|---|
| | Dashboard Create Browse Administration Discussion Logout |
| | This navigation was the default prior to Yellowfin 7.2, and it can still be set to default by your administrator.<br><br> 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. |

## Navigation Components

What you see when navigating Yellowfin is defined by your level of access. The following sections will explore all possible options; if something isn't available to you, a system administrator may need to adjust your role permissions to grant you 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.

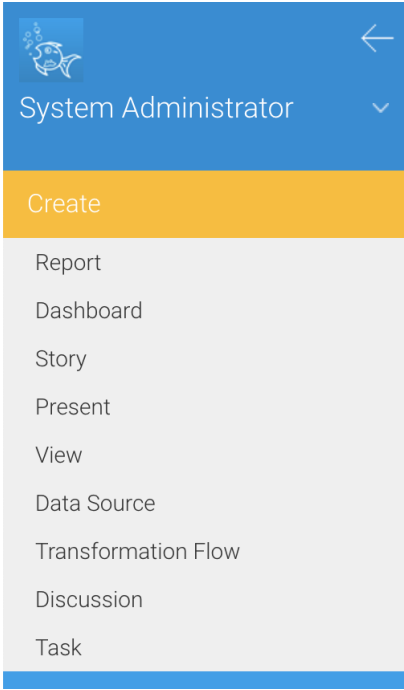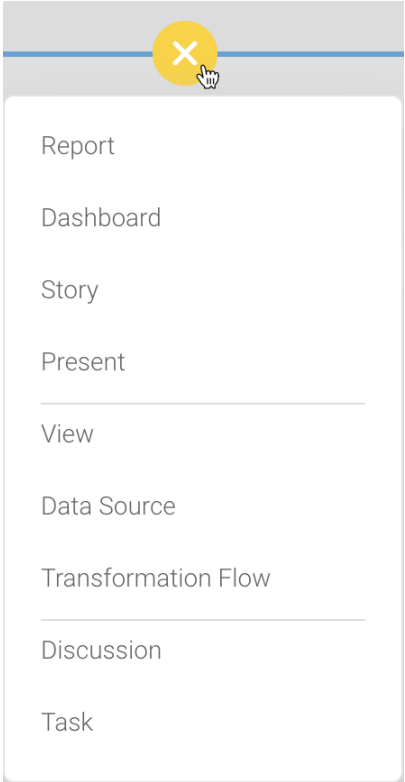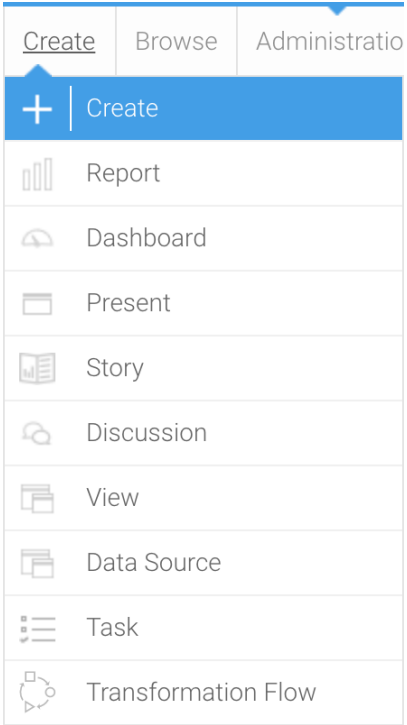| Left Side Navigation | Toolbar Navigation |
|---|---|
| Teresa Pringle<br>Product Specialist<br><br>Timeline<br>Tasks   0<br>My Favourites<br>Draft Content<br>Personal Broadcasts<br>Profile Settings | Teresa Pringle<br><br>Teresa Pringle<br>Timeline<br>Favourites<br>Personal Broadcasts<br>Discussion<br>Settings |
| This navigation is accessed by clicking on the burger button ☰ in the top left corner of the screen.<br><br>From there, click on your name to open the timeline settings.<br><br>This option requires the following settings:<br><br>• Configuration > System > Navigation Style = Left Side Navigation | This navigation is accessed by clicking on the arrow next to your name in the main navigation bar.<br><br>From there, the drop-down list shown above is displayed.<br><br>This option requires the following settings:<br><br>• Configuration > System > Navigation Style = Toolbar Navigation |

### Available Functions

| Option | Left Side | Toolbar | Description |
|---|---|---|---|
| Timeline | ✓ | ✓ | This is a user-specific event timeline which displays information based on a particular user's Yellowfin activity. Events include content activity around reports, dashboard tabs and stories,  plus loading of content such as views, CSV files, images, and collaborative events such as comments and discussion posts. |
| Tasks | ✓ | ✗ | Access your timeline, viewing the Task Management list layout. |
| Favourites | ✓ | ✓ | See a list of content you have nominated as your favorite content. It also includes a list of new content from which you could select new favorites. |
| Draft Content | ✓ | ✗ | View, via the Browse page, any draft content you have access to. Nothing else is displayed but drafts. |

| | | | |
|---|---|---|---|
| Personal Broadcast | ✓ | ✓ | This contains a list of content you are subscribed to, including reports, report comments, and story comment subscriptions. |
| Profile Settings | ✓ | ✓ | Define settings that effect how you see and use Yellowfin. These settings are only applied to your account. |

## 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.

| Left Side Navigation | Top Right (with Left Side Nav enabled) | Toolbar Navigation |
|---|---|---|
| System Administrator ⌄<br><br>**Create**<br><br>Report<br>Dashboard<br>Story<br>Present<br>View<br>Data Source<br>Transformation Flow<br>Discussion<br>Task | ✕<br><br>Report<br><br>Dashboard<br><br>Story<br><br>Present<br><br>View<br><br>Data Source<br><br>Transformation Flow<br><br>Discussion<br><br>Task | Create  Browse  Administratio<br><br>＋ Create<br>Report<br>Dashboard<br>Present<br>Story<br>Discussion<br>View<br>Data Source<br>Task<br>Transformation Flow |
| This option requires the following settings:<br><br>• Configuration > System > Navigation Style = Left Side Navigation<br>• Configuration > System > Content Creation Location = Left Side Navigation | This option requires the following settings:<br><br>• Configuration > System > Navigation Style = Left Side Navigation<br>• Configuration > System > Content Creation Location = Top Right | This option requires the following settings:<br><br>• 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

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

| Left Side Navigation | Toolbar Navigation |
|---|---|
| My Dashboards +<br>Sales Performance<br>Campaign Analysis<br>GIS Maps<br>Drill<br>People | Dashboard   Create   Browse |

**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

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

| Left Side Navigation |
|---|
| People +<br>Teresa Pringle<br>Wiki User<br>Browse > |

**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

The Browse option provides access to a list of all available content. It can be refined using one of the options if you're using the left navigation panel.

| Left Side Navigation | Toolbar Navigation |
| --- | --- |
|  |  |

**Available Functions**

| Option | Left Side | Toolbar | Description |
| --- | --- | --- | --- |
| Browse | ✗ | ✓ | Access the Browse page, where you can explore and locate reports, dashboards, stories, presentations, discussion streams and more. |
| Browse All | ✓ | ✗ | Access the Browse page, where you will see an unfiltered list of reports, dashboards, stories, presentations, discussion streams and more. |
| Dashboards | ✓ | ✗ | Filter the contents of the Browse page to display dashboards only. |
| Presentations | ✓ | ✗ | Filter the contents of the Browse page to display presentations only. |
| Themes | ✓ | ✗ | Filter the contents of the Browse page to display themes only. |
| Reports | ✓ | ✗ | Filter the contents of the Browse page to display reports only. |
| Stories | ✓ | ✗ | Filter the contents of the Browse page to display stories only. |
| Storyboards | ✓ | ✗ | Filter the contents of the Browse page to display old-style storyboards only. |
| Discussion Streams | ✓ | ✗ | Filter the contents of the Browse page to display discussions only. |
| Views | ✓ | ✗ | Filter the contents of the Browse page to display views only. |
| Transformation Flows | ✓ | ✗ | Filter the contents of the Browse page to display transformation flows only. |

## Signals option

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

| Left Side Navigation |
| --- |
|  |

**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

The Streams option provides access to discussion streams.

| Left Side Navigation | Toolbar Navigation |
|---|---|
|  |  |

**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

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

| Left Side Navigation | Toolbar Navigation |
|---|---|
|  |  |

**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. |