

Navigation

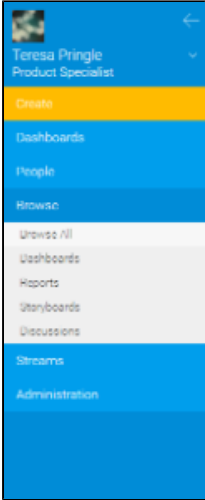
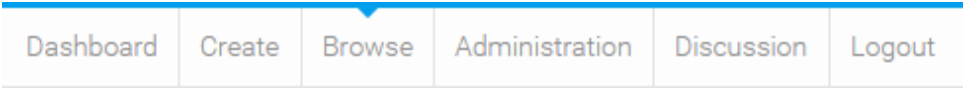
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Overview

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Navigation Styles

There are two styles of system navigation available in Yellowfin; Left Side Navigation, and Toolbar Navigation. The option used within your system is defined by an Administrator on the [Configuration](#) page.

Navigation	Description
Left Side Navigation	A vertical sidebar navigation menu. At the top is a user profile for Teresa Pringle, Product Specialist, with a back arrow and a checkmark. Below are buttons for 'Create' (orange), 'Dashboards', 'People', 'Browse', 'Unlink All', 'Dashboards', 'Reports', 'Storyboards', 'Discussions', 'Streams', and 'Administration'. This navigation style was introduced in Yellowfin 7.2 as an alternative to the traditional toolbar. Main system areas are able to be accessed via the collapsible panel on the left of the page, outside of Yellowfin builders such as Report, Storyboard, and View Builders.
Toolbar Navigation	A horizontal toolbar with six buttons: 'Dashboard', 'Create', 'Browse', 'Administration', 'Discussion', and 'Logout'. The 'Browse' button is highlighted with a blue underline and a downward arrow. This navigation was standard prior to Yellowfin 7.2. Main system areas are able to be accessed via the toolbar at the top of the page, outside of Yellowfin builders such as Report, Storyboard, and View Builders.

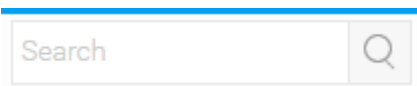
Navigation Components

Depending on the access you've been given by your role you will see different things in the system navigation. The following sections will explore all possible options - if something isn't available to you a system administrator may have to adjust your role permissions to grant you access.

Search

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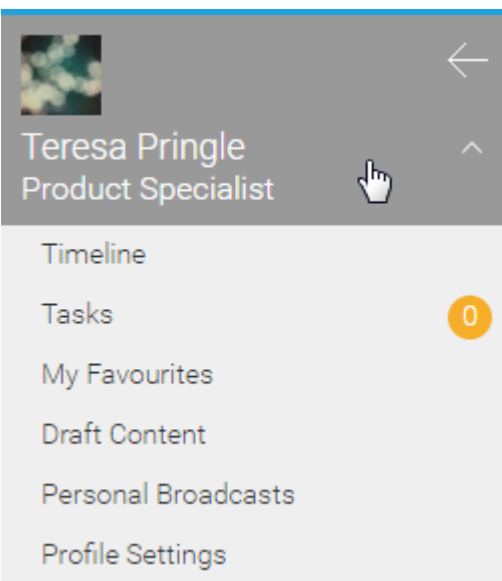
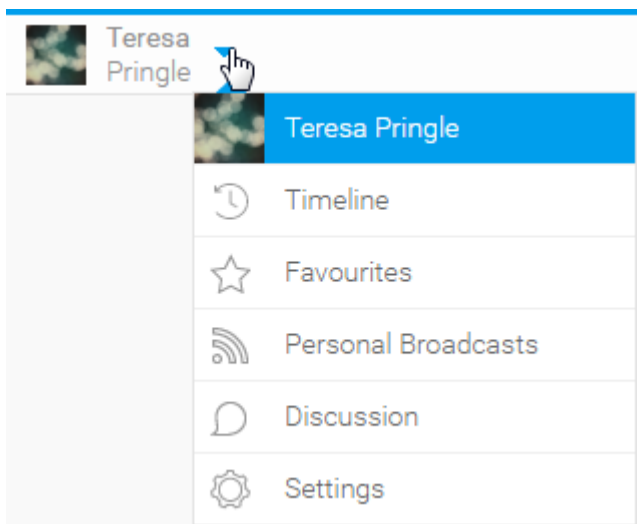
The Search allows you to locate content, such as Reports, Dashboards, Storyboards, displaying results on the [Browse Page](#). This option is configured through the Dashboard Display Settings in the [Content Settings](#) area of Administration.

Dashboard Top	Dashboard Right
	
This option is displayed in the main navigation bar at the top of the dashboard page. This option requires the following settings: Content Settings > Dashboard > Display Settings > Search Location = Top	This option is displayed to the right of the active dashboard tab, on the dashboard page. This option requires the following settings: Content Settings > Dashboard > Display Settings > Search Location = Right

User Timeline

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The Timeline area allows the user to view activity that has occurred in Yellowfin relevant to them. It also allows the user to define preferences that just apply to their Yellowfin account, customising the way they interact with Yellowfin.

Left Side Navigation	Toolbar Navigation
	

This navigation is accessed by clicking on the  button in the top left corner of the screen. From there the you should click on your name to open the timeline settings. This option requires the following settings: • 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. From there the pictured drop down list is displayed. This option requires the following settings: • Configuration > System > Navigation Style = Toolbar Navigation
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Available Functions

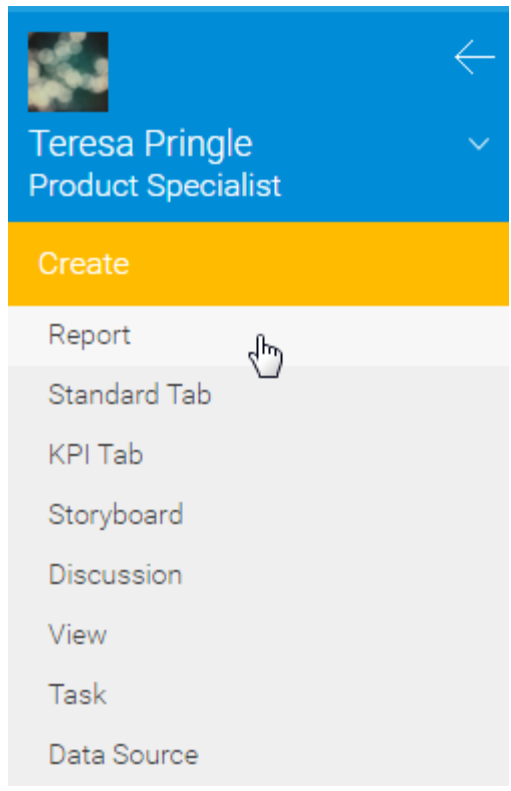
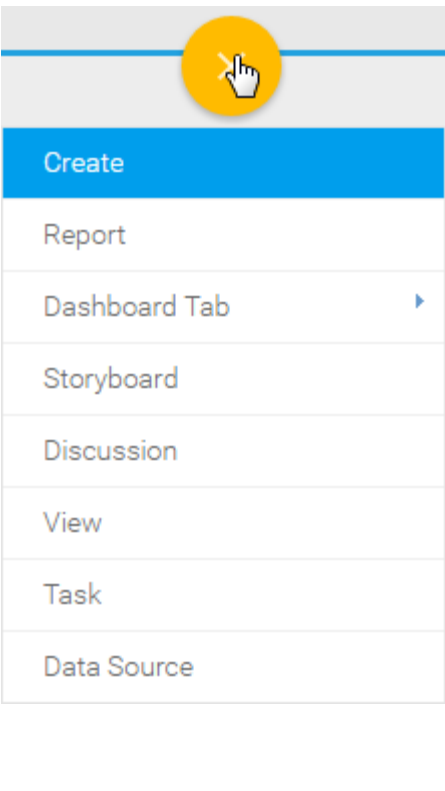
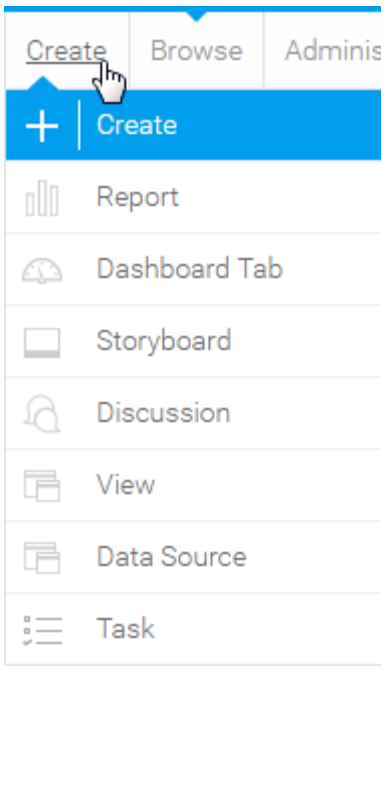
Option	Left Side	Toolbar	Description
Timeline	✓	✓	This is a user specific event timeline which displays information based on a particular users Yellowfin activity. Events include content activity around reports, dashboard tabs, and storyboards, loading of content such as views, csv files, and images, and collaborative events such as comments and discussion posts.
Tasks	✓	✗	This allows you to access your timeline, viewing the Task Management list layout.
Favourites	✓	✓	This allows the user to see a list of content they have nominated as their favourite. It also includes a list of new content from which they could select new favourites.
Draft Content	✓	✗	This allows you to view the browse page, filtered down to only show draft content you have access to.
Personal Broadcast	✓	✓	This contains a list of content the user is subscribed to including report, report comment, and storyboard comment subscriptions.
Profile Settings	✓	✓	This page allows the user to define settings that effect how they see and use the system. These settings are only applied to their account.

Create

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This menu gives you access to the various content builders used in the system. The options available to you through this menu will be restricted by your role permissions assigned by an Administrator. The create menu is dependant on the navigation style settings defined in Configuration > System settings. If you use Left Side Navigation you will be able to 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
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This option requires the following settings: • Configuration > System > Navigation Style = Left Side Navigation • Configuration > System > Content Creation Location = Left Side Navigation	This option requires the following settings: • Configuration > System > Navigation Style = Left Side Navigation • Configuration > System > Content Creation Location = Top Right	This option requires the following settings: • Configuration > System > Navigation : Toolbar Navigation

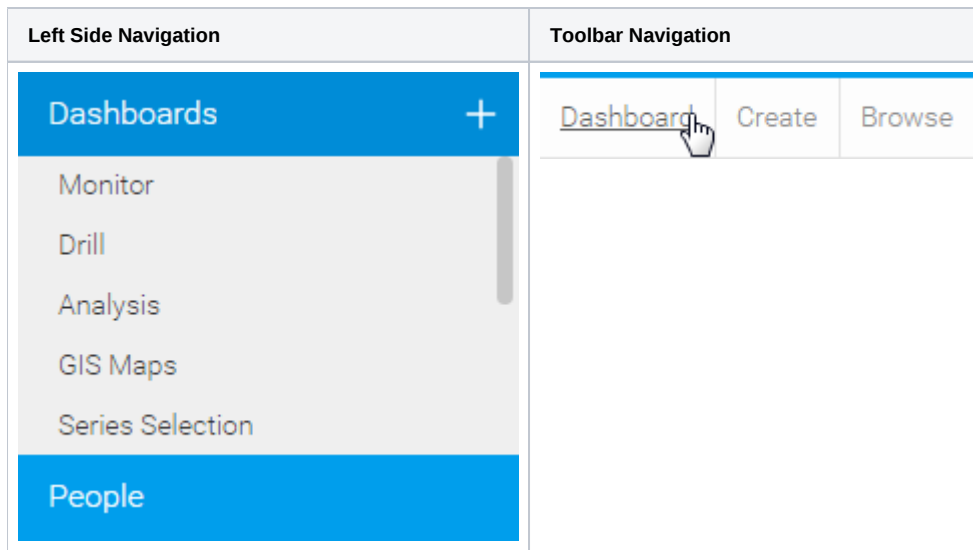
Available Functions

Option	Left Side	Top Right	Toolbar	Description
Report	✓	✓	✓	This link open the New Report window where you can define how you want to build your report.
Standard Dashboard	✓	✓	✓	This link allows you to create a new Standard Dashboard Tab.
KPI Dashboard	✓	✓	✓	This link allows you to create a new KPI Dashboard Tab.
View	✓	✓	✓	This link will open the Create New View window where you can build a view using several different builder types.
Data Source	✓	✓	✓	This link will open the New Connection window where you can set up a new data source connection using several different methods.
Storyboard Overview	✓	✓	✓	This link allows you to create a new Storyboard Overview .
Discussion Streams	✓	✓	✓	This link will take you to the Create Discussion Stream window where you can set up a new stream.
Task	✓	✓	✓	This will open the New Task window where you can create and assign a task.

Dashboards

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This menu gives you access to all the dashboard tabs you have assigned to your Dashboard.



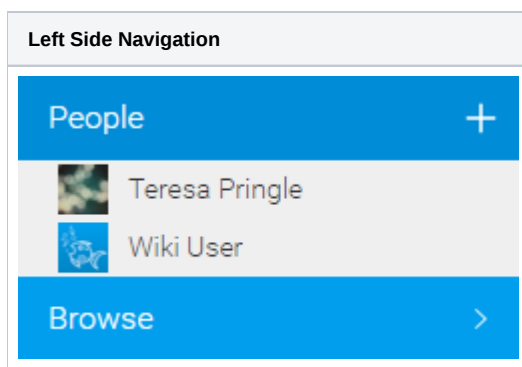
Available Functions

Option	Left Side	Toolbar	Description
Dashboard	✓	✓	This menu gives you access to all the dashboard tabs you have assigned to your Dashboard.
List of Tabs	✓	✗	This displays a list of each individual tab you have assigned to your Dashboard, allowing you to navigate straight to them directly.
Add Tab	✓	✗	This allows you to access the browse page, view a list of dashboard tabs, and add one to your dashboard.

People

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This menu gives you access to all the users you are connected to, and their timelines.



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

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These menus allow you access to a list of reports, dashboards, storyboards, and discussion streams.

Left Side Navigation	Toolbar Navigation
Browse Browse All Dashboards Reports Storyboards Discussion Streams Streams	Create <u>Browse</u> Administration

Available Functions

Option	Left Side	Toolbar	Description
Browse	✓	✓	This allows you to access the Browse page, where you can explore and locate reports, dashboards, storyboards, and discussion streams.
Browse All	✓	✗	This takes you to the Browse page, where you will see an unfiltered list of reports, dashboards, storyboards, and discussion streams.
Dashboards	✓	✗	This takes you to the Browse page, filtered down to just display dashboard tabs.
Reports	✓	✗	This takes you to the Browse page, filtered down to just display reports.
Storyboards	✓	✗	This takes you to the Browse page, filtered down to just display storyboards.
Discussion Streams	✓	✗	This takes you to the Browse page, filtered down to just display discussion streams.

Streams

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These menus allow you access to discussion streams.

Left Side Navigation	Toolbar Navigation
Streams + Training Wiki Information Administration >	Administration <u>Discussion</u> Logout

Available Functions

	Left Side	Toolbar	
Discussion Streams	✓	✓	This contains a list of all Discussion Groups you can access, and allows you to open them, viewing all activity within a group.
List of Streams	✓	✗	This displays a list of all the streams you have joined, providing access to each.
Add Stream	✓	✗	This allows you to access the browse page filtered down to just display streams, allowing you to locate and join new streams.

Administration

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

Left Side Navigation	Toolbar Navigation
Administration Admin Console Configuration Content Settings Export Import Images and Maps Email Template Session Management	Administration Discussion Lc Administration Admin Console Configuration Content Settings Export Import

Available Functions

Option	Left Side	Toolbar	Description
Understanding the Administration Console	✓	✓	This link will take you straight to the main Understanding the Administration Console page, rather than providing a short cut to one of the main admin components.
Configuration	✓	✓	This link will take you to the Configuration page, allowing you to customise Yellowfin settings, such as authentication, integration (headers, footers, and navigation), page formatting, email server and defaults, system parameters, and regional settings.
Content Settings	✓	✓	This link will take you to the Content Settings page, allowing you to manage the way Yellowfin displays each type of content.
Export	✓	✓	This link will take you to the Export page, allowing you to save an xml file defining selected pieces of content for use as backups or to transfer to different instances of Yellowfin.
Import	✓	✓	This link will take you to the Import page, allowing you to select and upload a file that defines pieces of content you wish to add to the system.
Images & Maps	✓	✗	This will take you to the Images & Maps page, allowing you to manage images, raster maps, and wms layers in the system.

Email Template	✓	✗	This will take you to the Email Template page, allowing you to customise the style of automated emails sent from the system.
Session Management	✓	✗	This will take you to the Session Management page, allowing you to view and manage the current sessions in the system.
Schedule Management	✓	✗	This will take you to the Schedule Management page, allowing you to view and manage all schedules in the system.
Dashboard Management	✓	✗	This will take you to the Dashboard Management page, allowing you to view and manage the dashboard tabs in the system.
Licence Management	✓	✗	This will take you to the Licence Management page, allowing you to view, update, and schedule reminders for the system licence.
Background Execution	✓	✗	This will take you to the Background Execution page, allowing you to manage current queued and running report queries.
Plugin Management	✓	✗	This will take you to the Plugin Management page, allowing you to manage all plugins in the system.
System Information	✓	✗	This will take you to the System Information page, which provides you with technical information required for maintenance and troubleshooting.
Content Translation	✓	✗	This will take you to the Content Translation page, which will allow you to manage all translations you've provided for content in the system.
Client Orgs	✓	✗	This will take you to the Client Orgs page, which will allow you to manage all Client Organisations in the system.

Inbox

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The [Inbox](#) is a depreciated feature, replaced by [Timeline](#) in Yellowfin 7.2. It used to include notifications related to Reports, Dashboards, Storyboards, Comments, Discussions, Broadcasts, Approvals.

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