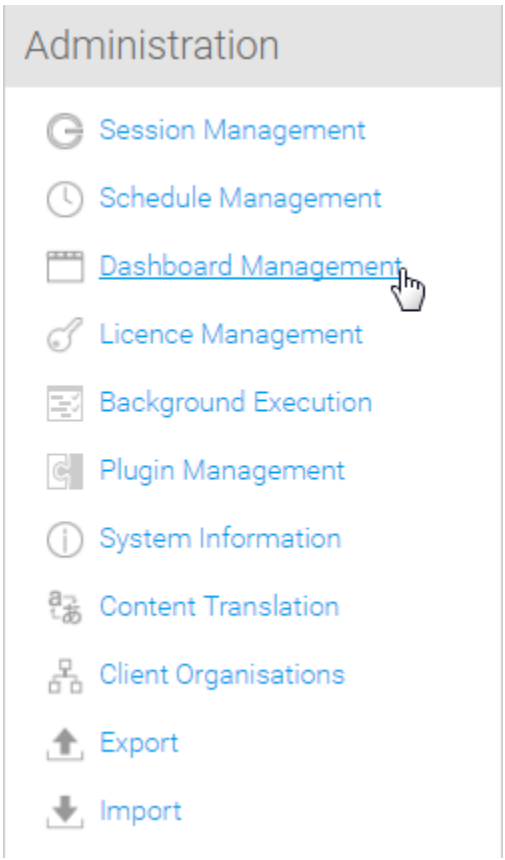
Dashboard Management

- Overview
- Dashboard List
- Dashboard Components
    - Dashboard Metadata
    - Dashboard Access & Subscribers
        - Access
        - Subscribers
    - Dashboard Reports
- Delete Dashboard

Overview

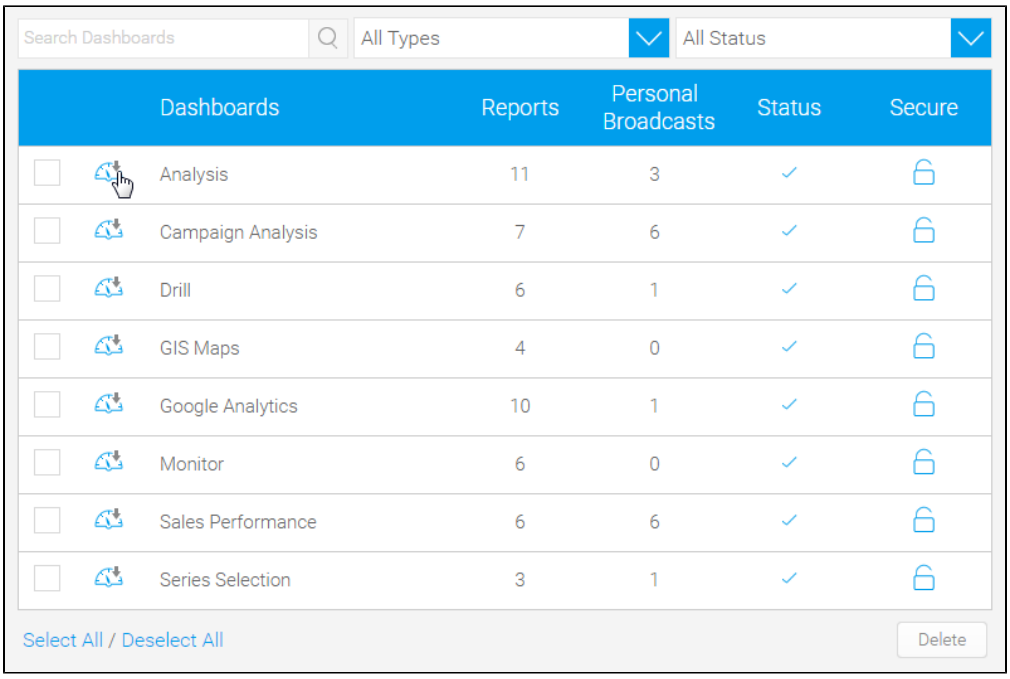
top
Yellowfin allows users to create dashboard tabs. Administrators may need to manage the tabs contained in a system, viewing usage information, editing, and deleting them.

To access the Dashboard Management list go to **Administration** > **Admin Console** > **Dashboard Management**.



Dashboard List

top
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.



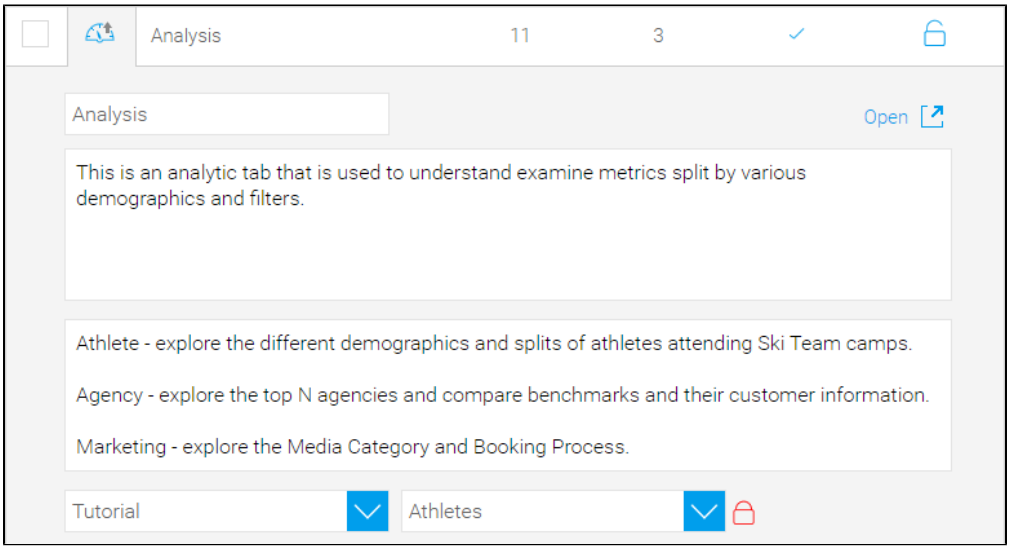
Dashboard Components

top

Dashboard Metadata

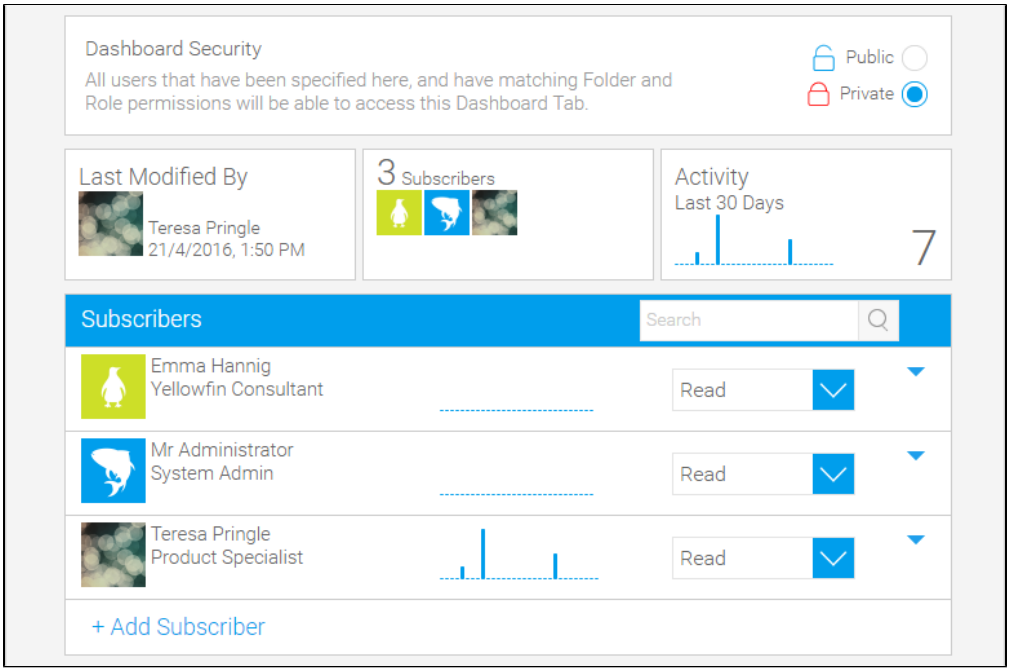
When managing individual tabs, you can adjust the standard metadata provided when the tab was built. This includes:

- Name
- Description
- Help Text
- Folder & Sub Folder



Dashboard Access & Subscribers

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

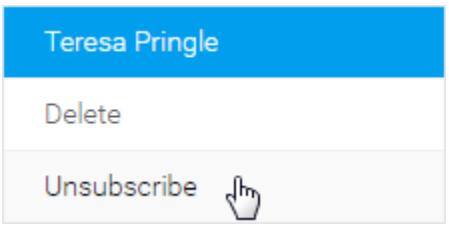


Access

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

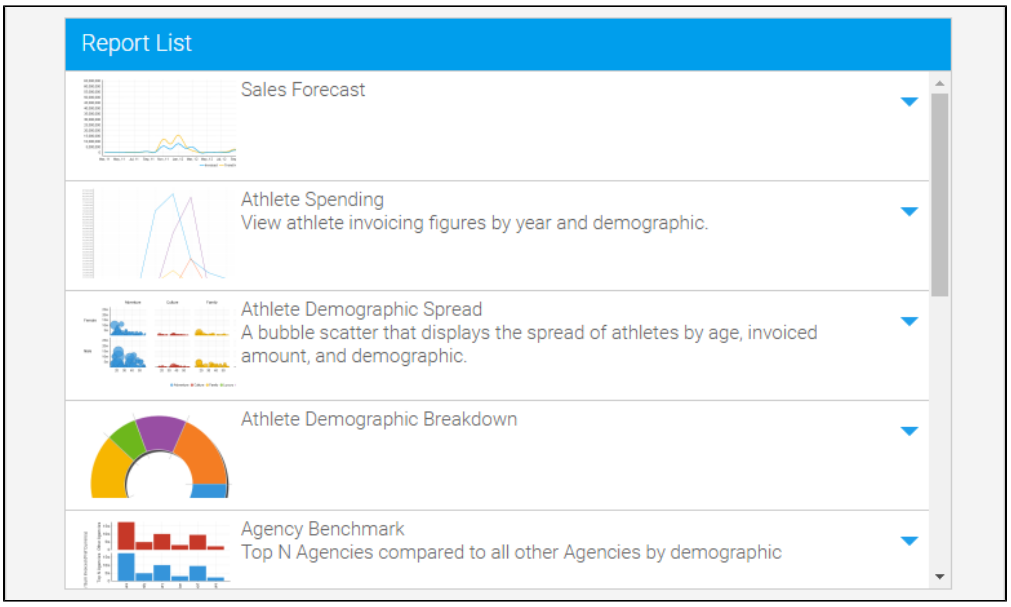
New subscribers can be added using the + Add Subscriber link. Once subscribe, users can be **Deleted** or **Unsubscribed** from this list, where the **Unsubscribe** option is only available if the tab is set to **Private**.



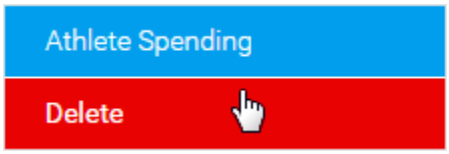
- **Delete** - this will remove the user from the subscribers list, resulting in the tab being removed from their personal Dashboard. If the tab is **Private**, this will also mean they've been removed from the access list, ensuring they can no longer **Read**, **Update**, or **Delete** the tab.
- **Unsubscribe**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



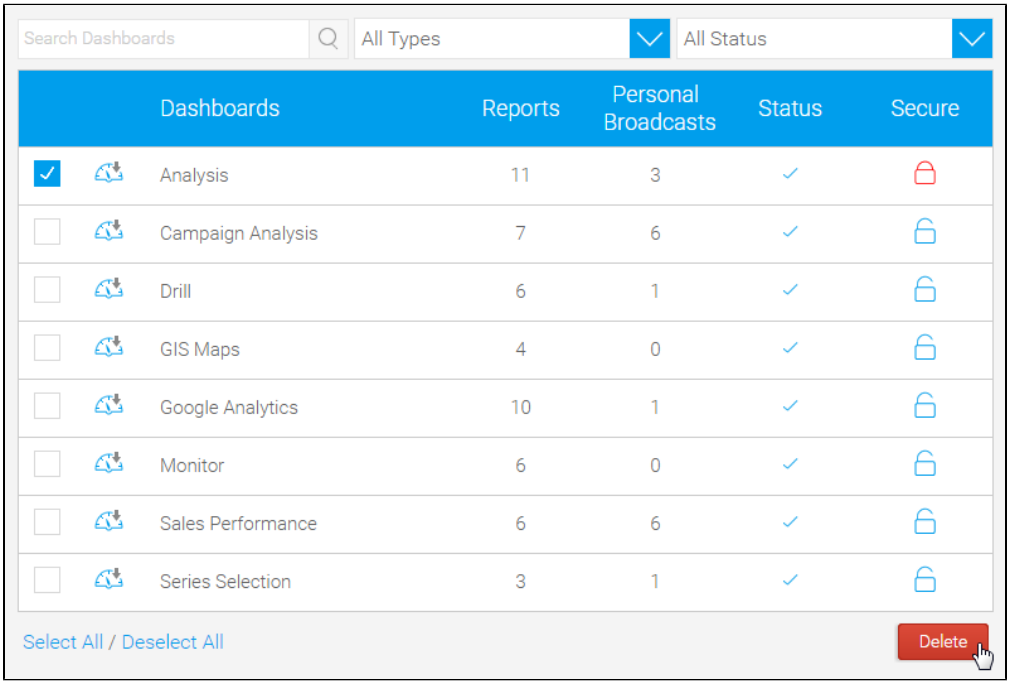
From here, individual reports can be deleted from the tab.



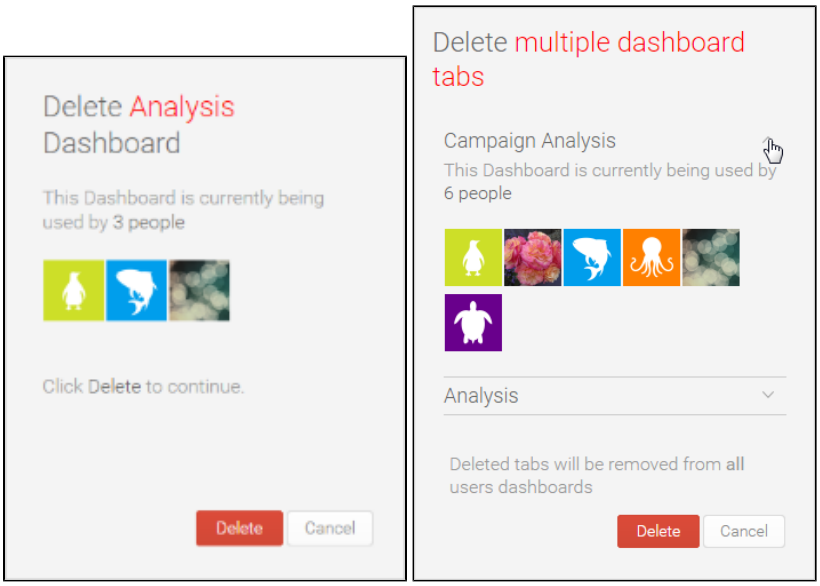
Delete Dashboard

top

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.



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

top