

Creating a Tab

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Overview

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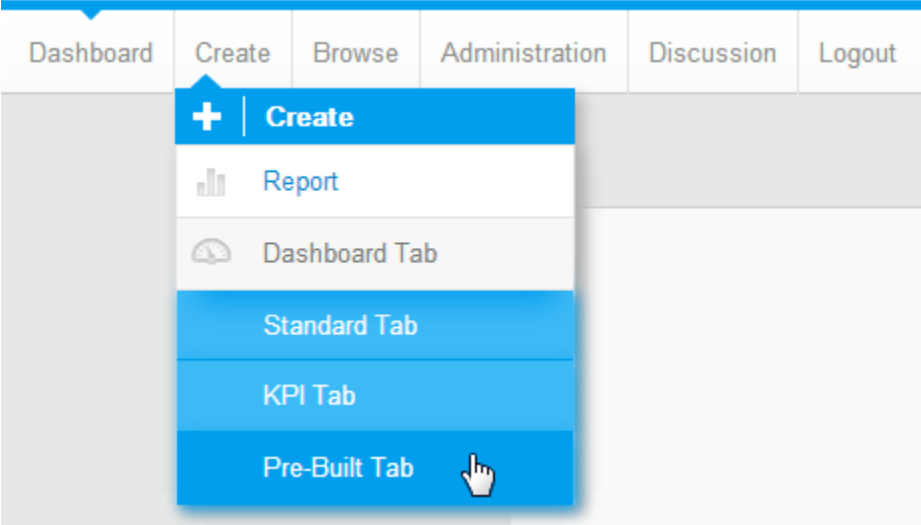
There are three types of tab available in Yellowfin; Standard, KPI, and Pre-Built.

Tab Type	Description
Standard	These tabs have the broadest range of functionality available to them, including linked filters and series. The only reason you would not use a Standard Tab when creating a new tab is if you wanted to include a KPI Report on the tab.
KPI	This tab type is only used if you want to include KPI Reports on your tab. The reason this is a separate type is that some functionality is incompatible with KPI Reports, so the tab disables things like filters and linked series.
Pre-Built	This is a tab that has been created by a user and is not currently displayed on your dashboard. This does not involve creating a new tab, just selecting an existing one to display.

Adding a Pre-Built Tab

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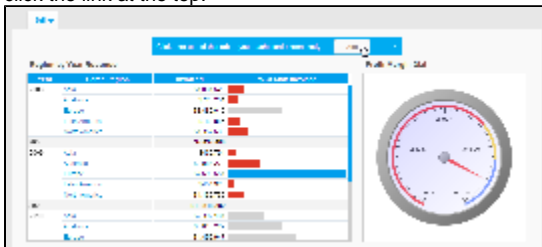
1. To add a pre-built public tab, click **Create** in the main navigation bar, select **Dashboard Tab** and choose the **Pre-built Tab** option.



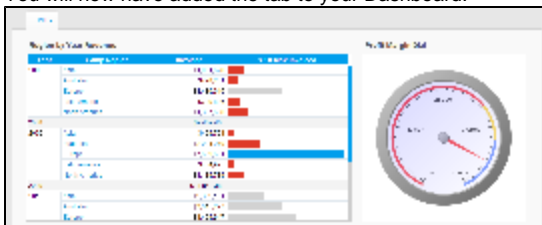
- You will now see a list of tabs available to you. Click on the tab you wish to add.



- On selecting a tab you will be returned to the Dashboard and shown a preview of the tab. To confirm you wish to add the tab to your dashboard, click the link at the top.



- You will now have added the tab to your Dashboard.

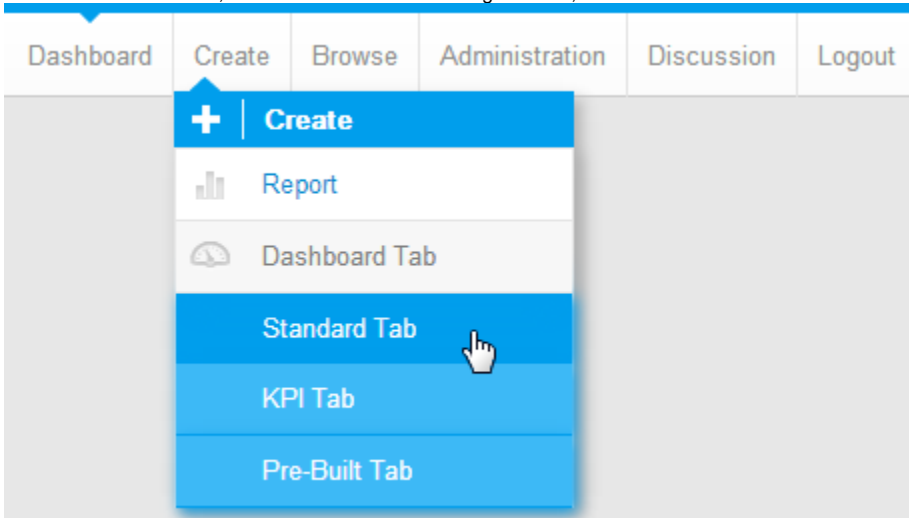


Note: you can only have one instance of a public tab on your dashboard.

Creating a Standard Tab

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- To build a Standard Tab, click **Create** in the main navigation bar, select **Dashboard Tab** and choose the **Standard Tab** option.



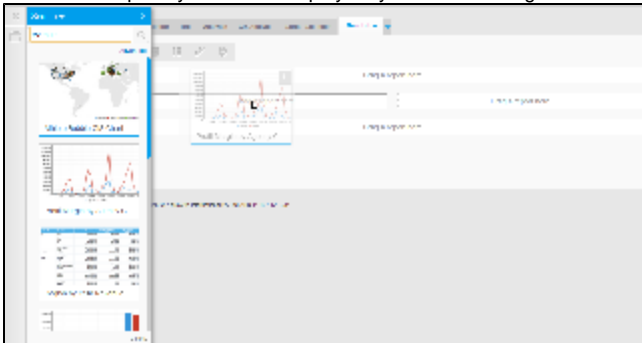
2. You will now see an empty Tab Layout display. From here you will need to locate the reports you wish to display on the tab and drag them onto the template.



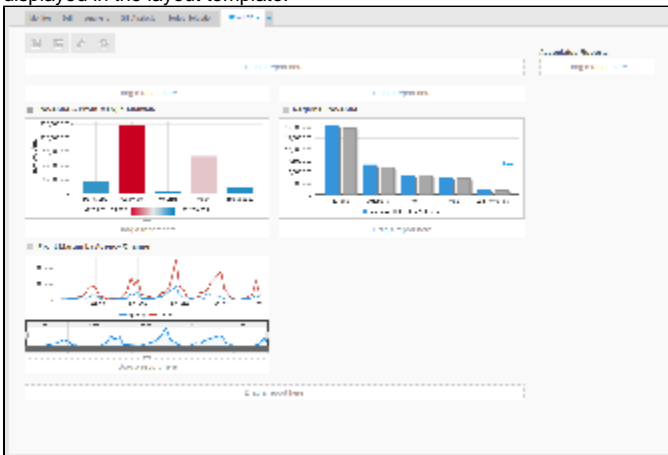
Open the Report List panel on the left of the screen.



3. Locate the Reports you wish to display on your tab and drag them into one of the 'Drag a report here' place holders.



4. Add all the reports you wish to display, then close the Report List panel by clicking on the X in the top right corner. You will now see your reports displayed in the layout template.



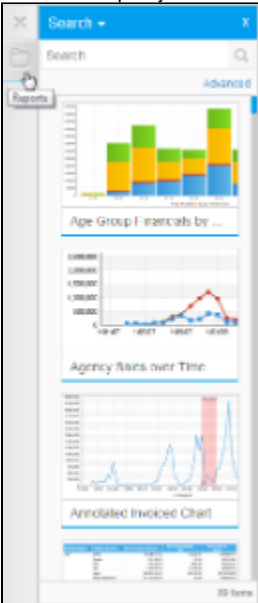
Associated Reports

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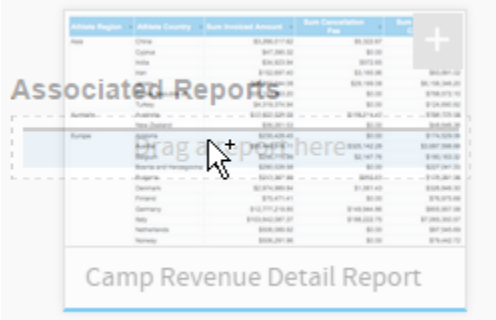
Dashboard Tabs can also contain links to relevant reports, rather than displaying them fully on the Dashboard Tab, much like Storyboard Slides can contain [Associated Content](#). These reports are generally detailed reports that are too granular or complex for use on a Dashboard, rather providing additional, supporting information related to the Tab content.

In order to add Associated Reports:

- 1. Locate the report you wish to add through the Report List panel on the left of the screen.



- 2. Drag the report into the Associated Reports panel on the right of the screen.



Once added, you can view Associated Reports through the default location defined in **Administration > Content Settings > Dashboard > Display Settings > Associated Reports Location**

Display Settings

Default dashboard width

Define the default width of the dashboard in pixels or % of the current window.

1000px

px

%

Alignment

Specify the default alignment of the dashboard.

Left

Center

Tab Buttons

Specify the location of the dashboard tab buttons, or disable them completely. These are the Add, Edit, and Remove buttons.

Right

Left

Off

My Content Location

Specify the location of the My Content panel, or disable it completely. This contains Favourites, Draft, and Recently Accessed content lists.

Right

Left

Left Side Nav

Off

Associated Reports Location

Specify the location of the Associated Reports panel, or disable it completely.

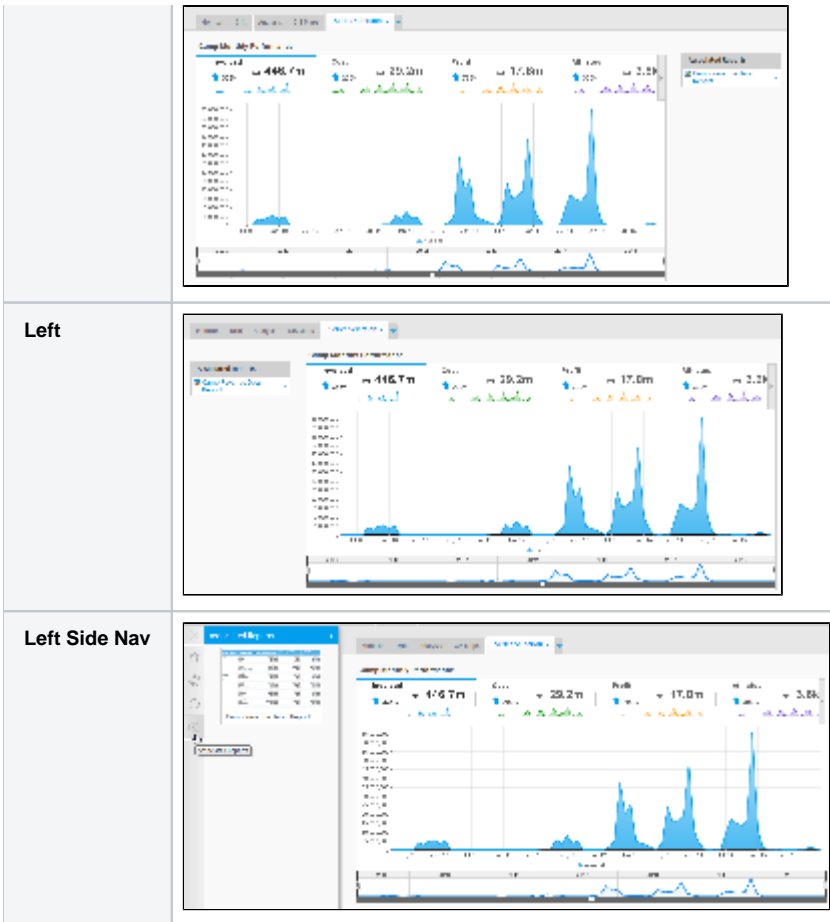
Right

Left

Left Side Nav

Off

Right	
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Tab Customisation

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From here you are able to do several things:

1. Adjust the size and display of your reports.

See [Report Portlet](#) for more information.

2. Adjust the layout template of the tab.

See [Dashboard Layout](#) for more information.

3. Create Sub Tabs as part of the tab.

See [Creating Sub Tabs](#) for more information.

4. Create Analytic Links on the tab.

See [Analytic Setup](#) for more information.

5. Link Series Selection on the tab.

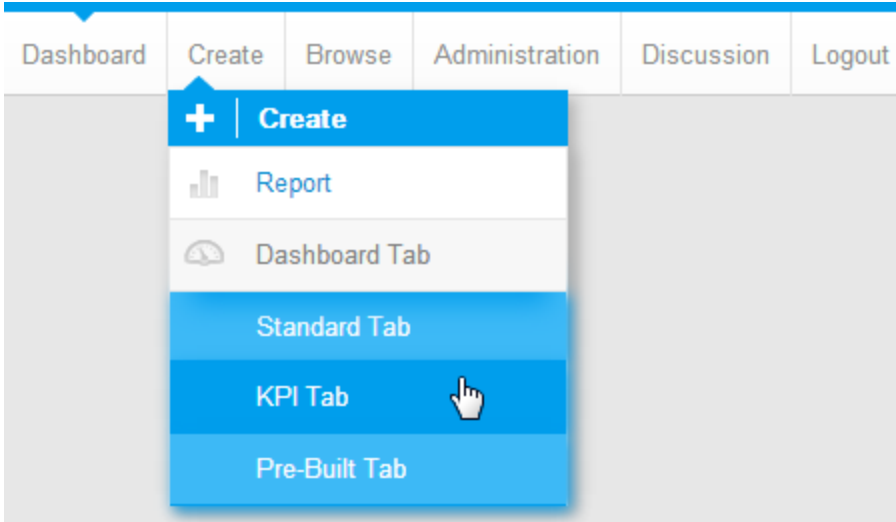
See [Series Selection Setup](#) for more information.

Creating a KPI Tab

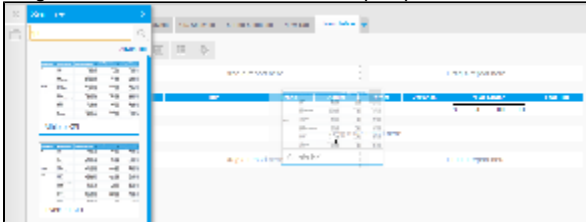
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This requires the same process as creating a Standard Tab, with two differences:

1. Select **KPI Tab** from the Create Dashboard Tab menu



2. Drag KPI Formatted tabs into the KPI Report panel in the tab. Standard reports can still be added to all the **Drag a report here** panels.



Creating Sub Tabs

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Sub Tabs allow you to split the content of a tab across multiple layouts, while still sharing the same filter sets.

1. Open the **Dashboard Layout** menu and enable **Sub Tabs**



2. Click the **+ Add Subtab** link to create new sub tabs



3. Provide a name and layout option for the sub tab



4. Reorder the sub tabs if required by dragging them in the list on the left



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