Series Selection Setup

Overview

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Standard Tabs can be used if you wish to create relationships between multiple reports on a single tab. In a Series Selection Standard Tab you can link reports so that you are viewing the same selectable metric across all linked reports.
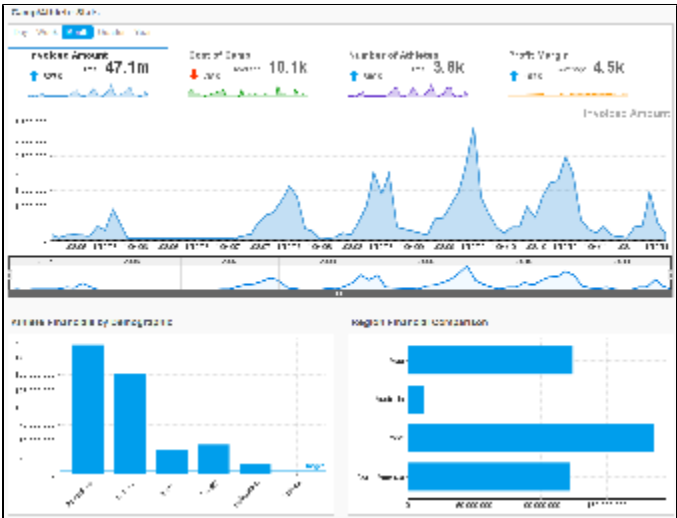
See also: *Standard Tab with Series Selection*

Linking Reports

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First set up a new Standard Tab by following these steps: Creating a Standard Tab. The reports used on the tab must:
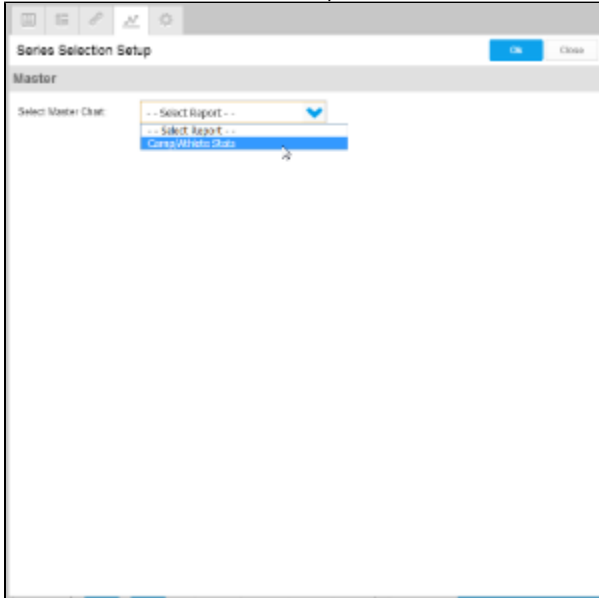
- Have Series Selection charts
- At least one of the charts **must** be restricted to a single metric view of Series Selection. For example, a pie chart, or time series panel selection.

Series Selection Setup

1. Click on the Series Selection Setup menu item

2. From here you will need to define the Master Chart. This is the chart that controls the Series Selection on the tab, all other charts will lose their Visible Series Selection display. The only charts available in this lists are charts that are restricted to displaying one series at a time.
Select the Master Chart from the drop down list.

3. You will now have the option to select the Default Field. This is the metric that is displayed across all your Series Selection charts when the tab initially loads.
Select the field you wish to display by default.
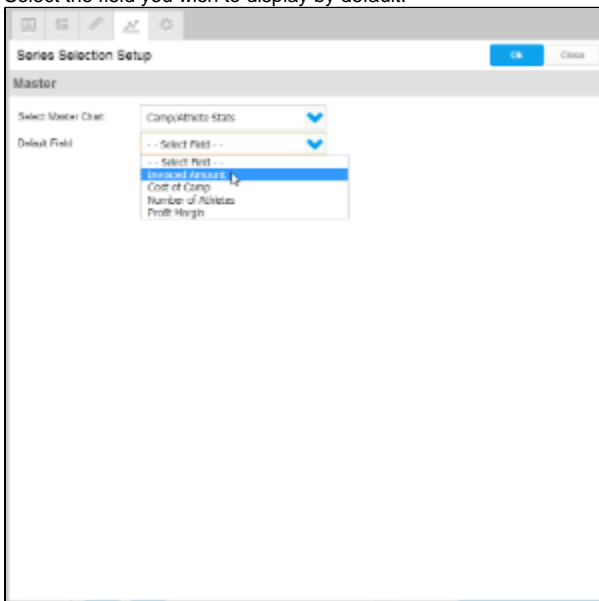
4. Once the Master report options have been defined, you will need to link your other reports to the Master Chart's series. You will see a list of reports displayed on the left side of the setup menu, the first selected.
Click on the report you wish to link.

5. You will have a list of series available in the Master Report displayed, with a drop down list next to each that allows you to set up links. You need to select equivalent series. For example, if your Master Chart is displaying 'Invoiced' you should link this to an Invoicing series in your other report.
Select the equivalent series from the drop down lists.

6. Click **Save** to keep the links you've created for this chart

7. You will now need to repeat steps 4 to 6 for the other reports you wish to link. Click **OK** to complete the process.