

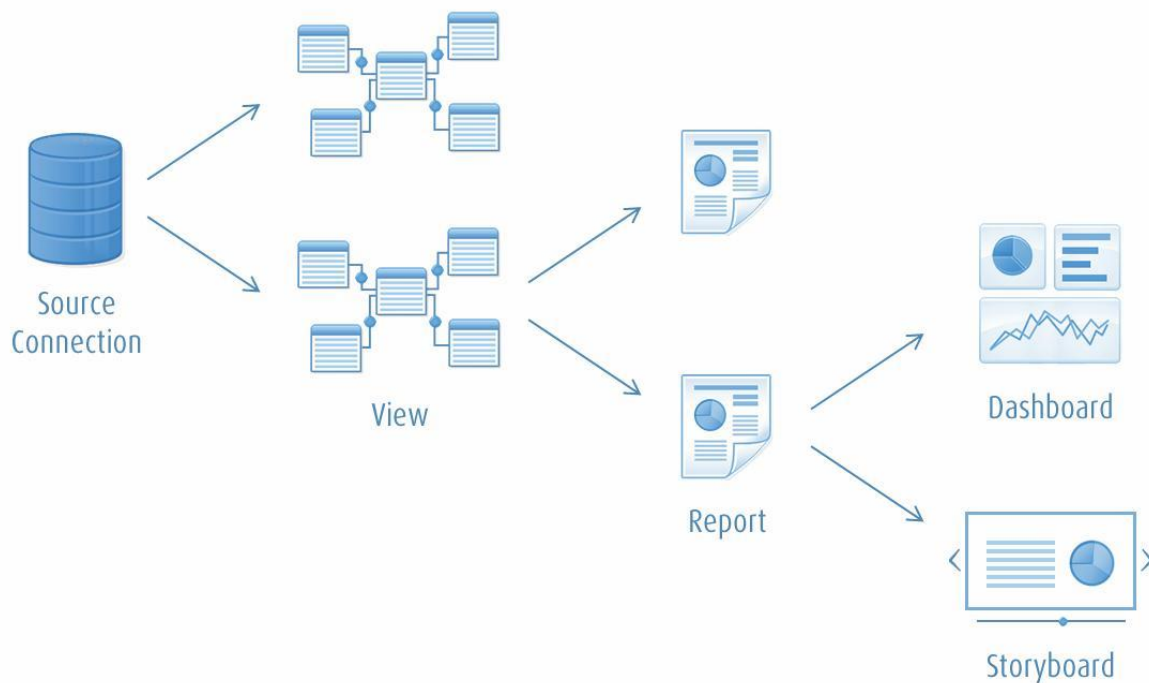
Overview

The purpose of this document is to assist you to undertake a guided tutorial of Yellowfin. The tutorial will make use of the demonstration database which is included as part of the installation process. As a result the tutorial will only concern itself with producing reports from this data source. If you wish to use Yellowfin against alternate data sources then you may wish to use this guide as a starting point.

During this guided tutorial you will explore data source connections, create a view, author and format reports and create a dashboard. If you wish to explore functionality in addition to what is covered in this guide please refer to either the administration or user guides.

Yellowfin Components

Yellowfin is designed to reuse components, such as Source Connections and Views, as much as possible. This model creates a hierarchy of objects within Yellowfin and understanding this hierarchy will assist you with this tutorial.



Source Connections	A source connection stores details of how Yellowfin will connect to an external database that you wish to report from. For every database that you wish to write reports for, you will have to create a single source connection record within Yellowfin. A source connection can have many views.
Views	Once you have defined a source connection you must create one or more view records that your users can report off. A view is a metadata layer that allows you to define which fields, from which tables in your source database can be made available for reporting. A view can have many reports written against it.
Reports	Once a view is defined you can write a report against it. A report record is a report definition which defines which columns in your database you want to display and how you want to display them. A report can be used on one or on any number of dashboard tabs.
Dashboard Tabs	Once you have written reports, you can begin to construct your dashboard. You can place as many reports onto a tab as you wish. You can also create as many tabs as you wish on your own personal dashboard.
Storyboards	Storyboard is a presentation layer in Yellowfin that allows users to create slide shows with fully functional reports as well as text, images, and videos.

Pre-Requisites

Prior to starting this tutorial process it is assumed that you have successfully installed Yellowfin database and that you have a valid license key from Yellowfin.

Skills Required

Parts of this guide contain advanced database concepts and assume that you have some understanding of how relational databases work. Although you will not need SQL skills, a basic understanding of SQL would also assist in understanding the concepts covered in this document - especially for the development of database views.

About the Guide

Steps	Description	Learn how to...
1	Login	<ul style="list-style-type: none"> • Login to Yellowfin
2	Source Connections	<ul style="list-style-type: none"> • Create a connection to external databases
3	Create a View	<ul style="list-style-type: none"> • Create a simple view by selecting and joining tables together
4	Define Meta Data	<ul style="list-style-type: none"> • Make columns available for reporting • Apply meta data to database columns • Create calculated fields
5	Create Reports	<ul style="list-style-type: none"> • Create table and chart reports • Schedule Reports for broadcasting • Apply conditional formatting through alerts
6	Create a Dashboard	<ul style="list-style-type: none"> • Create a new dashboard tab • Add reports to tabs

Logging In

An administrator user is created by default during the installation process. The username for this user is “**admin@yellowfin.com.au.**” This user has access to all the functions required for this evaluation including administration and reporting functions. The default password for this user is “**test**”.

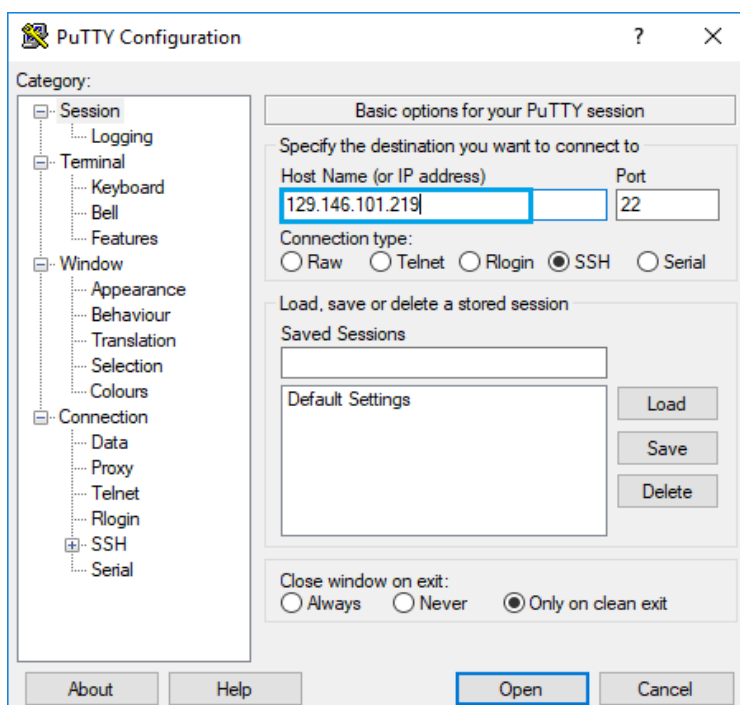
Before you log into the yellowfin you can startup the startup.sh in the yellowfin appserver

Before you open the link you can Log into your SSH session using client SSH URL provided in test drive launch page.

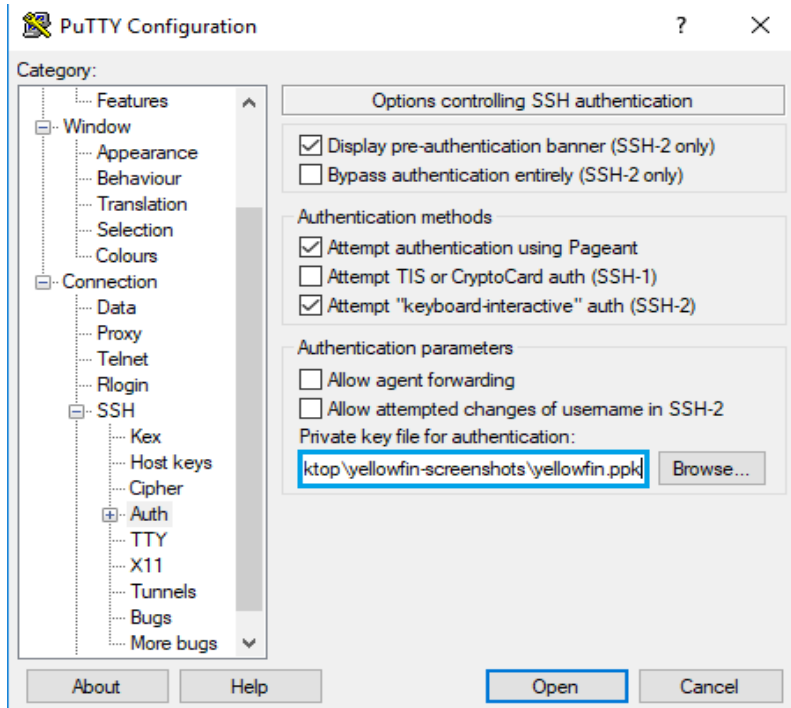
```
Outputs:

YellowfinVM_Instanceprivate_ip = [
    10.0.0.2
]
YellowfinVM_Instancepublic_ip = [
    129.146.101.219
]
PS E:\yellowfin> |
```

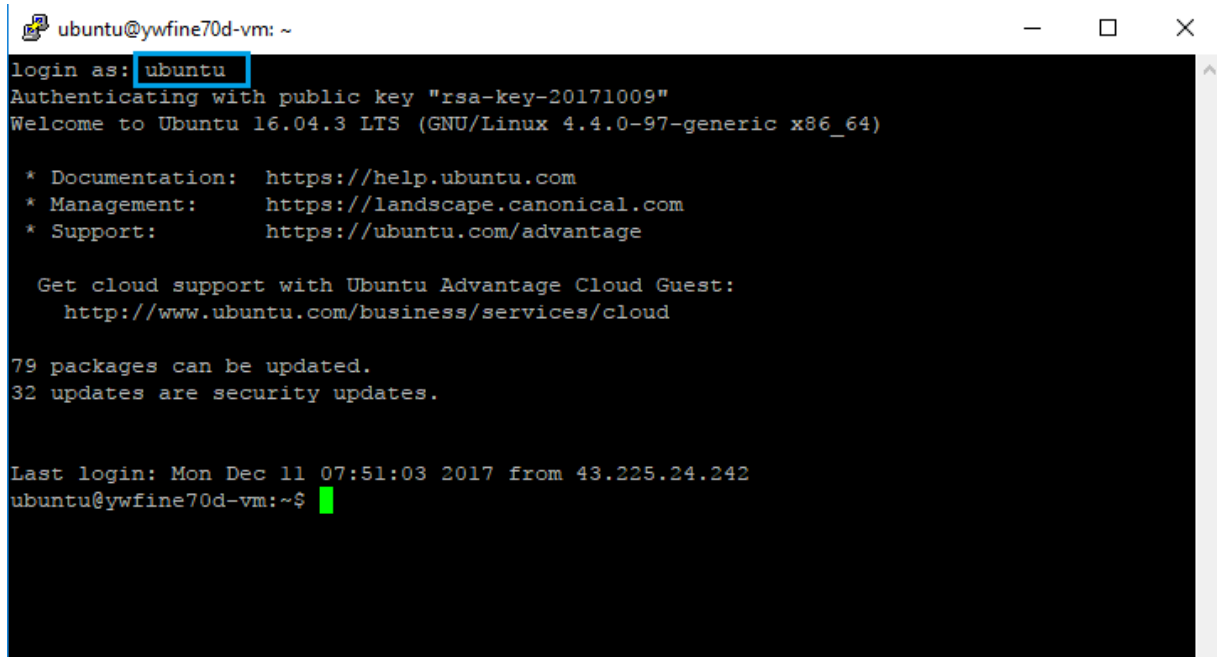
Open putty and SSH into the VM using the IP address



Click on browse and select the private key you have stored in your local system after then click on open button



Login as: ubuntu



Open the appserver from the yellowfin and run startup.sh, it will start the all services of the yellowfin VM.

sh startup.sh

```
root@ywfine70d-vm:/home/ubuntu/yellowfin-installer/appserver/bin# ls
bootstrap.jar          Mac OS X - Shutdown.command      tcnative-1.dll.x86
catalina.bat           Mac OS X - Startup (background).command  tomcat8.exe
catalina.sh            Mac OS X - Startup (terminal).command    tomcat8.exe.x64
catalina-tasks.xml     service.bat                        tomcat8.exe.x86
commons-daemon.jar     setclasspath.bat                  tomcat8w.exe
commons-daemon-native.tar.gz  setclasspath.sh                   tomcat-juli.jar
configtest.bat         shutdown.bat                       tomcat-native.tar.gz
configtest.sh          shutdown.sh                        tool-wrapper.bat
daemon.sh              startup.bat                        tool-wrapper.sh
derby.log              startup.sh                         version.bat
digest.bat             tcnative-1.dll                    version.sh
digest.sh              tcnative-1.dll.x64
root@ywfine70d-vm:/home/ubuntu/yellowfin-installer/appserver/bin# ./startup.sh
Using CATALINA_BASE:   /home/ubuntu/yellowfin-installer/appserver
Using CATALINA_HOME:   /home/ubuntu/yellowfin-installer/appserver
Using CATALINA_TMPDIR: /home/ubuntu/yellowfin-installer/appserver/temp
Using JRE_HOME:        /usr/lib/jvm/java-8-openjdk-amd64/jre
Using CLASSPATH:       /home/ubuntu/yellowfin-installer/appserver/bin/bootstrap.jar:/home/ubuntu/yellowfin-installer/appserver/bin/tomcat-juli.jar
Tomcat started.
root@ywfine70d-vm:/home/ubuntu/yellowfin-installer/appserver/bin#
```

Now stop the firewall services

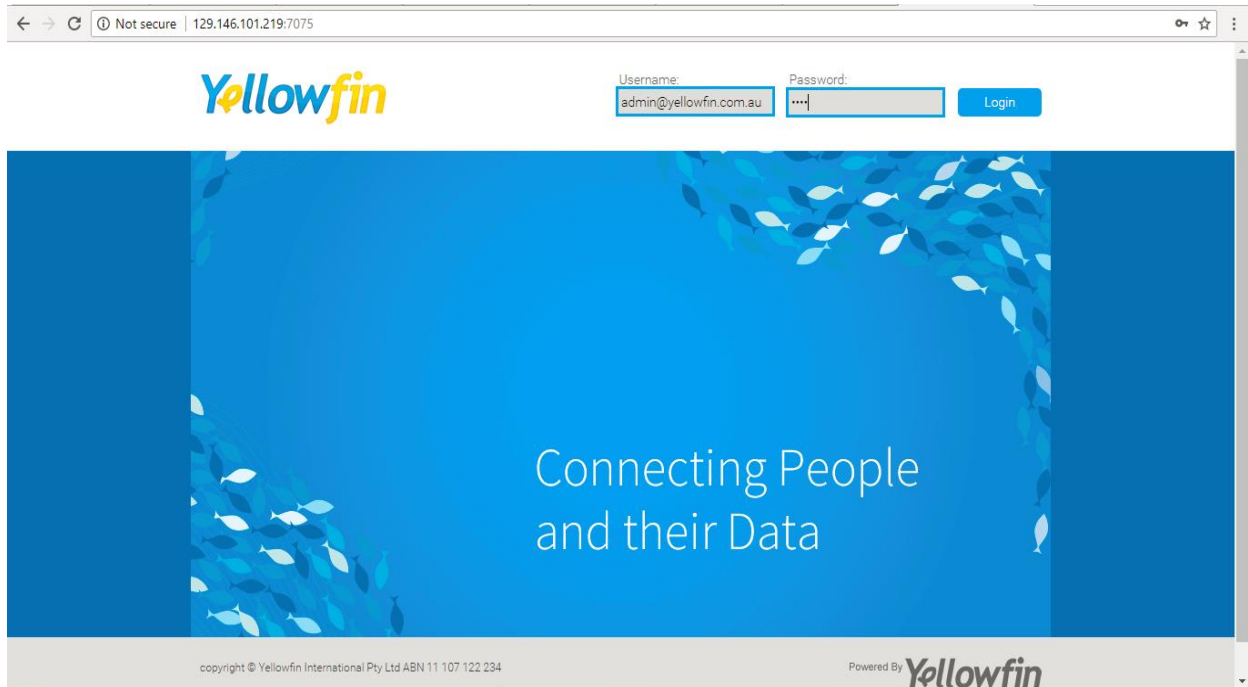
systemctl stop firewalld.service

```
root@ywfine70d-vm:/home/ubuntu/yellowfin-installer# systemctl stop firewalld.service
root@ywfine70d-vm:/home/ubuntu/yellowfin-installer#
```

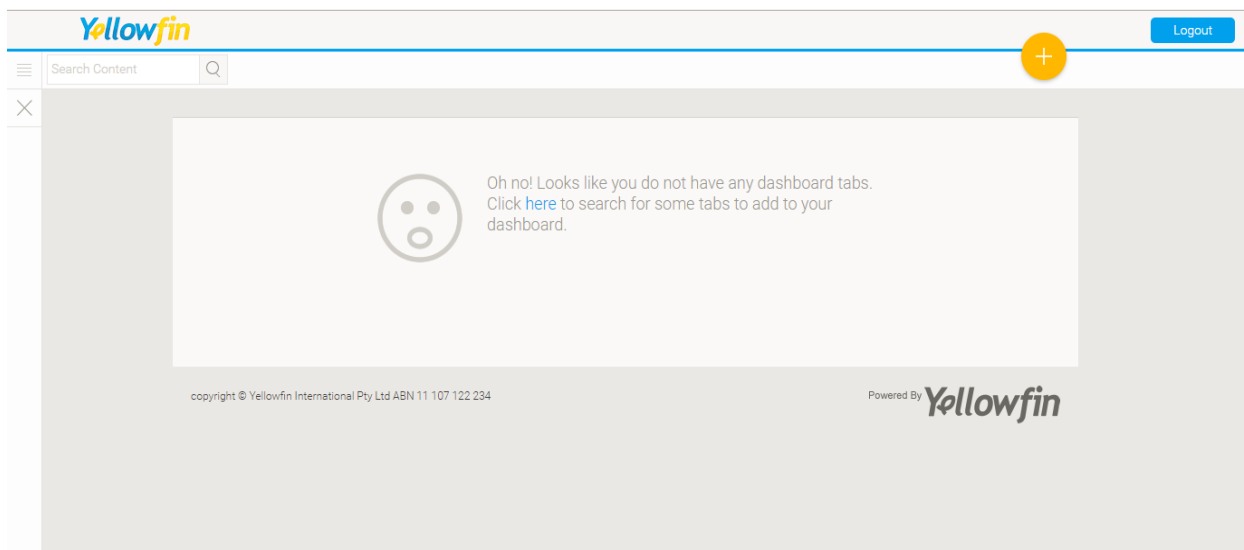
To Logon go to the entry page for your installation of Yellowfin within your web browser, this is usually at <http://YourYellowfinServer>.

Ex: **<http://129.146.101.219:7075>**

Type in the user name in the email address box (admin@yellowfin.com.au), followed by the password (test) in the lower box, and press the login button (we added Yellowfin web server IPAddress 7075).

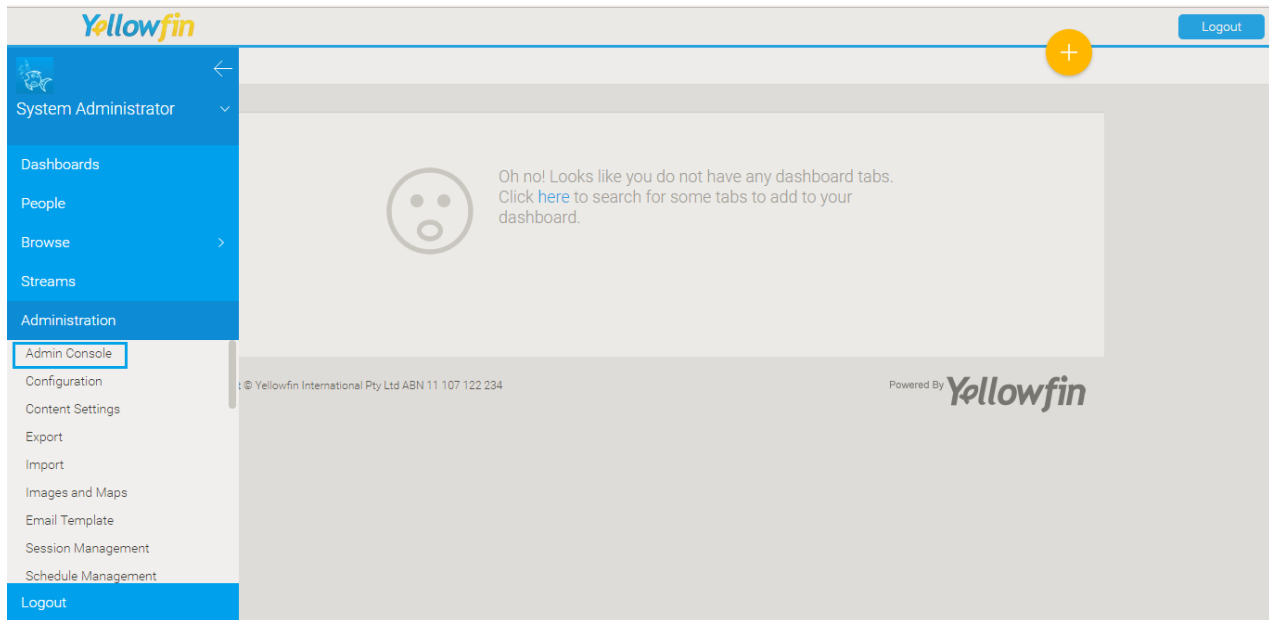


You should now be logged in to Yellowfin and the home page dashboard will load. It will open the empty dashboard as shown in the below screenshot.

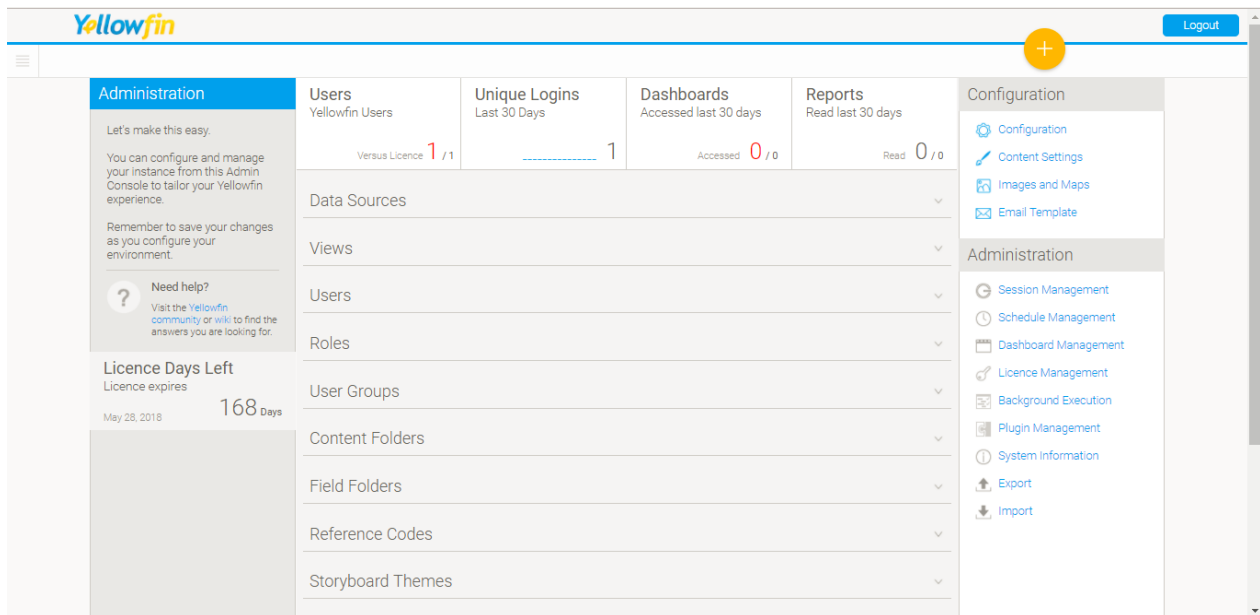


Administration

Click the Administration link on the navigation bar. This will open an administration shortcut menu. If you wish you to go to the main Administration page, click on the Admin Console link.



This will open the administration panel. On this panel you will see a number of administration.



Usage KPIs

KPI	Description
Users	This monitors the number of registered writers vs. the number of licenced writers, allowing the administrator to see how close they are to the licence limit. When there are less than 5% users left available on the licence, the number will be highlighted red .
Unique Logins	This monitors the number of unique user logins in the last 30 days, allowing the administrator to see how the system traffic is tracking.
Dashboards	This monitors the number of unique dashboard tabs accessed each day for the last 30 days vs. the total number of active tabs available, allowing the administrator to see what proportion of tabs are used. When less than 50% of dashboards are used, they're highlighted red . When more than 75% are used, they're highlighted blue
Reports	This monitors the number of unique reports accessed each day for the last 30 days vs. the total number of active reports available, allowing the administrator to see what proportion of reports are used.

Data Sources

A Data Source record in Yellowfin contains the connection details the system uses to access source data for reporting. Connections are then used by Views to provide tables and fields. Through the Admin Console you will be able to create new data sources and associated views. In addition you will be able to manage the security access to these connections.

Source Types

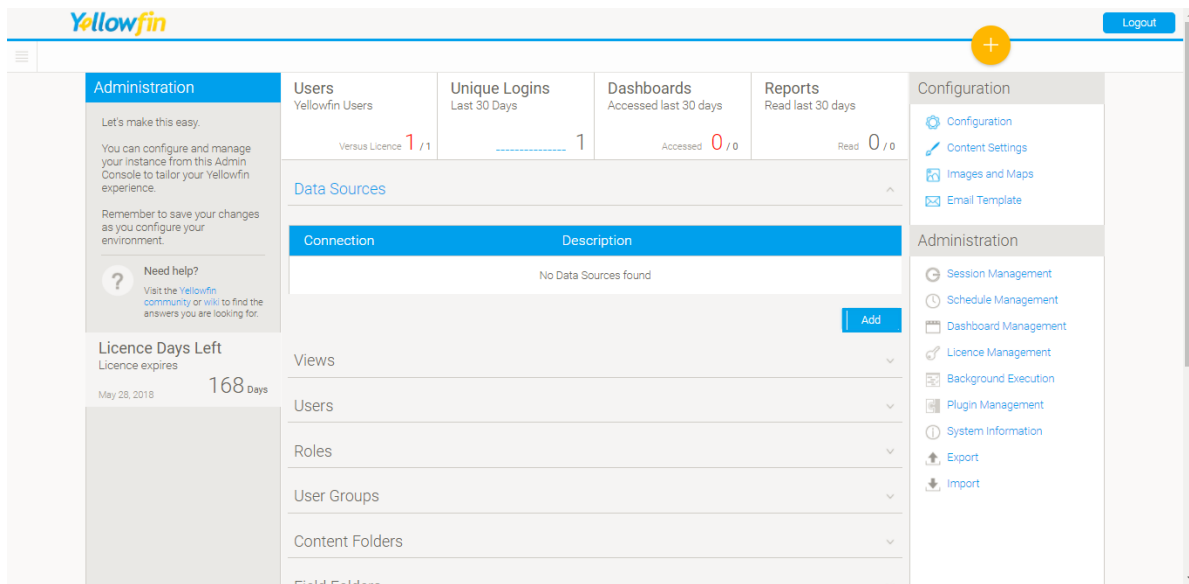
Yellowfin supports numerous data sources for you to report off. These include SQL databases such as DB2, Oracle and SQL Server, Lotus Notes Domino, and Yellowfin In-Memory. As of Yellowfin 7.3, you are also able to connect to a range of sources using third party connectors.

Data Source List

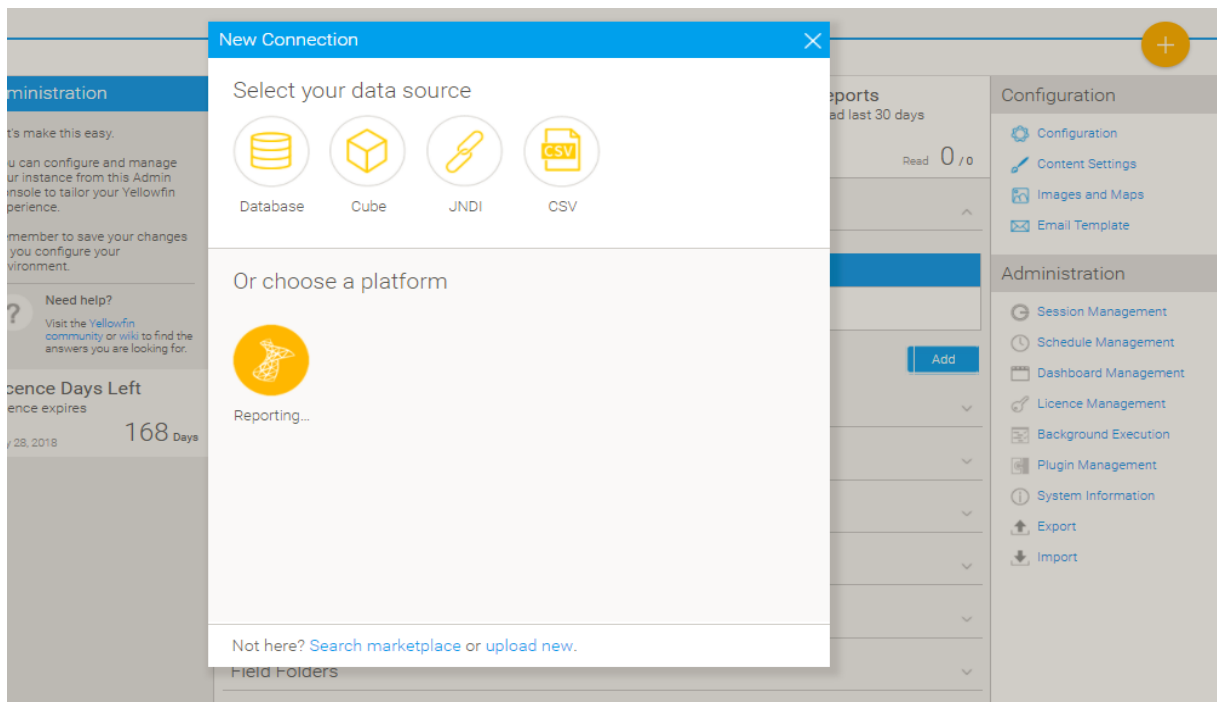
The Data Sources list shows you all the available connections that have been defined in the system. This list is accessed by clicking on **Administration** in the main navigation menu and selecting the **Admin Console** option from the drop down list.

Add Connection

In order to create a new Data Source Connection an administrator will have to click on the **Add** button at the bottom of the Data Sources list in the Admin Console.



When creating a new data source connection, you will need to first specify either the type of source you wish to connect to, or provide/select a third party connector to use.



When creating your new database connection, you will be presented with a basic list of details to complete.

The screenshot shows a 'New Connection' dialog box with the following fields and options:

- Name:** Text input field
- Description:** Text input field
- Database Type:** Dropdown menu with the option '-- Select --'
- Username:** Text input field
- Password:** Text input field
- Create View:** Blue button with a dropdown arrow

This will include;

1. Name
2. Description
3. Database Type (from the drivers you have available)
4. Username
5. Password

Once you have selected your database type, you will be prompted to complete options specific to your connection.

Next Step:

When the basic connection details are complete you will need to choose how you wish to proceed.

New Connection

Connection Settings | Create View | Analyse

Name: yellowfin-datasource

Description: The detail section contains metadata that assists users select the right source and...

Database Type: MySQL

Include Schema in SQL: ☒

Database Host: localhost

Database Port: 3306

Database Name: yellowfin

Use Custom Fetch Size: ☐

JDBC Driver: com.mysql

Username: yellowfin

Advanced Connection Editor

Test Connection

Create View

Save & Close

Cancel

Create View

Once you fill all the details click on **Save & Close**, this will allow you to save your connection and return to the page you were previously on.

After that **Test Connection**, this will allow Yellowfin to test the connection information provided to ensure that the database can be reached and create the data source.

Connection

Specify the user name for connecting to this database.

Password

Click here to change password.

Specify the password for connecting to this database.

Isolation Level

Read Uncommitted

▼

Specify which isolation level should be used when connecting to this database.

Test Connection

✓

Connection Succeeded

Database:

MySQL

Product Version:

5.7.20-0ubuntu0.16.04.1

Driver:

MySQL Connector Java

Driver Version:

mysql-connector-java-5.1.25 (Revision: \${bzm.revision-id})

Database Version:

5.7

Source Name:

MySQL

Database Schema:

AccessClassList

AccessGroup

AccessGroupFlat

AccessGroupMembers

AccessLevel

...

Connection Pool

▼

Security

🔒

▼

Access Filters

▼

Usage Parameters

▼

Views

Views within Yellowfin provide the link between users, their reports, and the database. The purpose of the view is to simplify the knowledge required by end users of the source database. This section describes some of the basic view management options available to you.

Multiple Table View

Yellowfin provides you with the capability to create Views of your database through a drag and drop builder or as a straight SQL statement.

This section describes how to use the view builder to create views of your database that end users can access for reporting purposes. These views are built by first creating an entity relationship diagram which joins all required tables together.

Click Add button of the Views section it will open the new window.

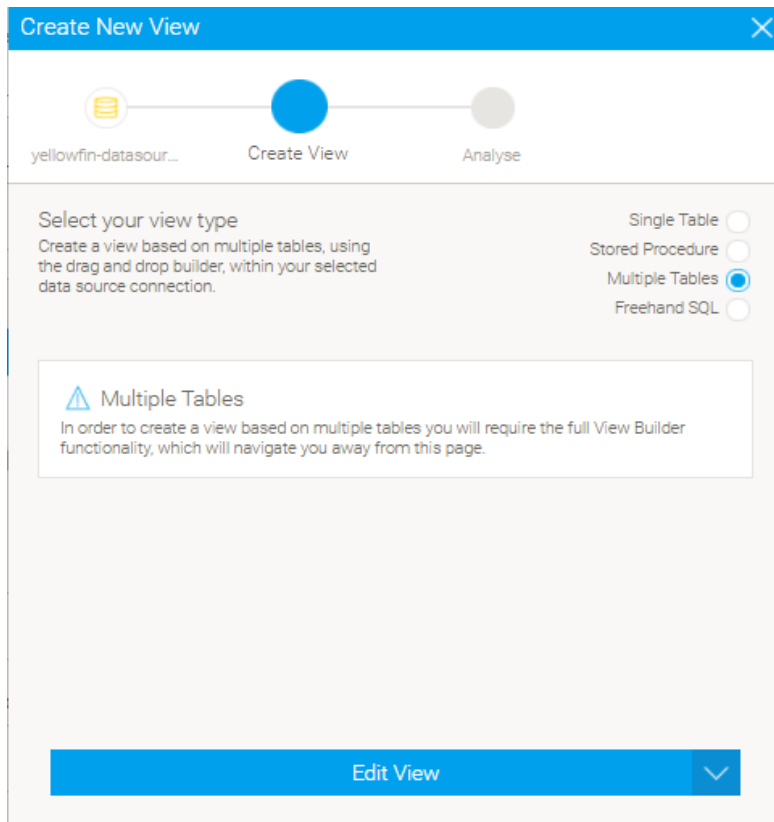
The screenshot shows the Yellowfin Admin Console interface. On the left is an 'Administration' sidebar with a 'Need help?' section and a 'Licence Days Left' indicator showing 168 days remaining. The main content area has a top navigation bar with 'Users', 'Unique Logins', 'Dashboards', and 'Reports'. Below this is a 'Data Sources' section, followed by the 'Views' section which is currently active. The 'Views' section displays a table with columns 'View' and 'Description', showing 'No Views Found'. An 'Add' button is located at the bottom right of the table. On the right side of the console, there is a 'Configuration' sidebar with links to 'Configuration', 'Content Settings', 'Images and Maps', and 'Email Template', and an 'Administration' sidebar with links to 'Session Management', 'Schedule Management', 'Dashboard Management', 'Licence Management', 'Background Execution', 'Plugin Management', 'System Information', 'Export', and 'Import'.

Click on whatever created the data source it as open the popup window.

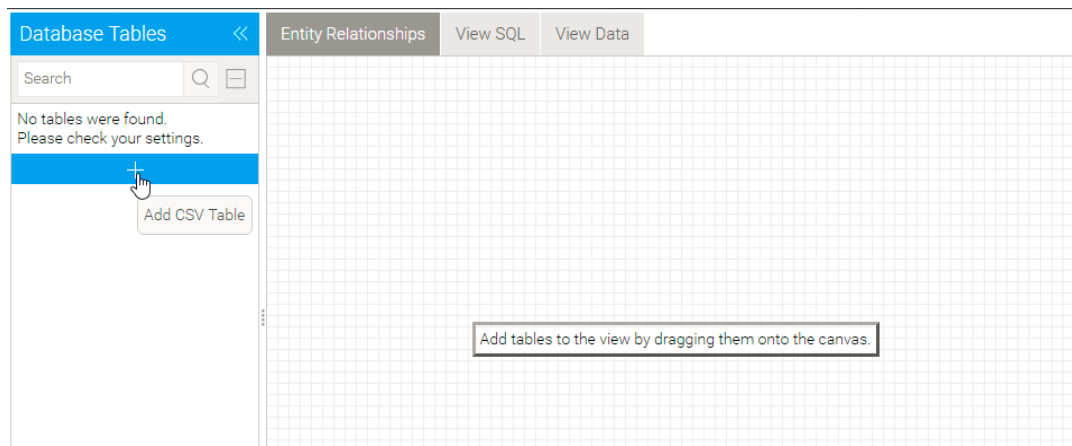
The screenshot shows a 'Create New View' popup window. At the top, there is a progress bar with three steps: 'Data Source' (selected), 'Create View', and 'Analyse'. Below the progress bar is a 'Select Data Source' section with a search bar and a filter icon. A list of data sources is displayed, with 'yellowfin-datasource' selected. At the bottom of the window, there is a link that says 'Not here? Create a new source.'

This option allows you to use Yellowfin to simply join multiple tables from a single selected database through a web interface.

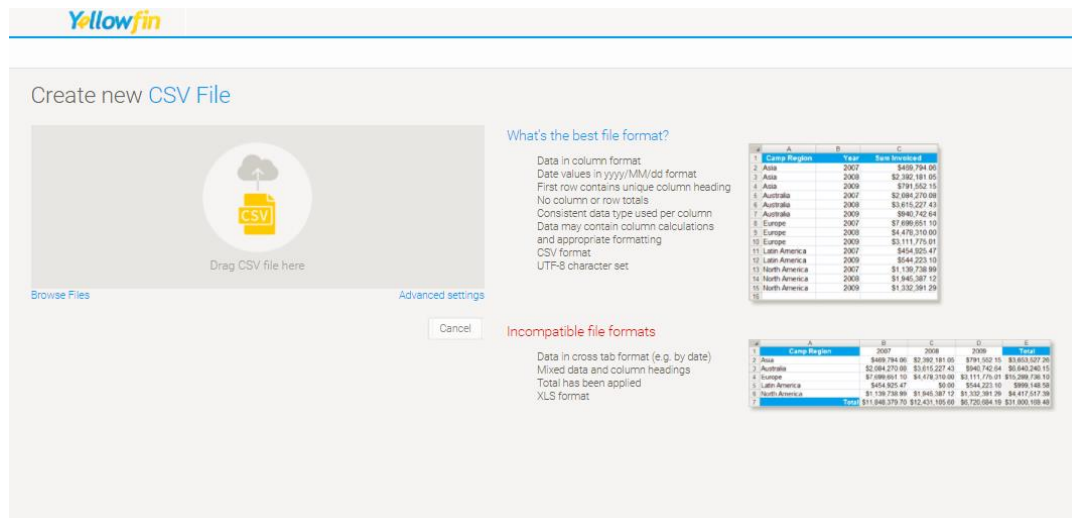
Click on multiple table radio button and Edit view



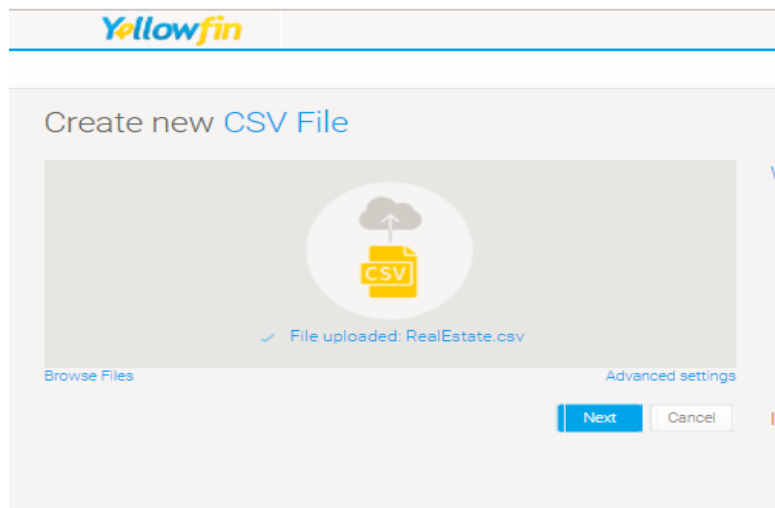
Click on the **Add CSV Table** button at the bottom of the Database Tables list on the left.



Either click on the **Browse Files** link, or the CSV image to locate your file, or drag your file from the file system onto the grey area.



Once selected, Yellowfin will confirm that the file has been uploaded.



Once you've selected your file, and defined any settings required, you will be taken to the CSV Data step of the process. This is where you will be able to define several things, including Column Titles, CSV Table Settings, and Converted Fields.

Yellowfin													
Data		Finish											
		S.NO	street	city	zip	state	beds	baths	type	sale_date	price	IoTlatitude	IoTLongitude
1		1.00	3526 HIGH ST	SACRAMENTO	95.638.00	CA	2.00	1.00	Residential	Wed May 21 00:00..	59,222.00	38.63	-121.43
2		1.00	51 OMAHA CT	SACRAMENTO	95.623.00	CA	3.00	1.00	Residential	Wed May 21 00:00..	68,212.00	38.48	-121.43
3		1.00	2796 BRANCH ST	SACRAMENTO	95.615.00	CA	2.00	1.00	Residential	Wed May 21 00:00..	68,880.00	38.62	-121.44
4		1.00	2805 JANETTE ..	SACRAMENTO	95.615.00	CA	2.00	1.00	Residential	Wed May 21 00:00..	69,307.00	38.62	-121.44
5		1.00	6001 MCMAHON..	SACRAMENTO	95.624.00	CA	2.00	1.00	Residential	Wed May 21 00:00..	81,900.00	38.52	-121.44
6		1.00	5828 PEPPERMI..	SACRAMENTO	95.641.00	CA	3.00	1.00	Condo	Wed May 21 00:00..	89,921.00	38.66	-121.33
7		1.00	6048 OGDEN NA..	SACRAMENTO	95.642.00	CA	3.00	2.00	Residential	Wed May 21 00:00..	90,895.00	38.68	-121.35
8		1.00	2561 19TH AVE	SACRAMENTO	95.620.00	CA	3.00	1.00	Residential	Wed May 21 00:00..	91,002.00	38.54	-121.48
9		1.00	11150 TRINITY R..	RANCHO CORDO..	95.670.00	CA	2.00	2.00	Condo	Wed May 21 00:00..	94,905.00	38.62	-121.27
10		1.00	7325 10TH ST	RIO LINDA	95.673.00	CA	3.00	2.00	Residential	Wed May 21 00:00..	98,937.00	38.70	-121.44
11		1.00	645 MORRISON ..	SACRAMENTO	95.638.00	CA	3.00	2.00	Residential	Wed May 21 00:00..	100,309.00	38.64	-121.45
12		1.00	4085 PAWIN CIR	SACRAMENTO	95.623.00	CA	3.00	2.00	Residential	Wed May 21 00:00..	106,250.00	38.47	-121.46
13		1.00	2930 LA ROSA RD	SACRAMENTO	95.615.00	CA	1.00	1.00	Residential	Wed May 21 00:00..	106,852.00	38.62	-121.44
14		1.00	2113 KIRK WAY	SACRAMENTO	95.622.00	CA	3.00	1.00	Residential	Wed May 21 00:00..	107,502.00	38.48	-121.49
15		1.00	4533 LOCH HAV..	SACRAMENTO	95.642.00	CA	2.00	2.00	Residential	Wed May 21 00:00..	108,750.00	38.67	-121.36
16		1.00	7340 HAMDEN PL	SACRAMENTO	95.642.00	CA	2.00	2.00	Condo	Wed May 21 00:00..	110,700.00	38.70	-121.35
17		1.00	6715 6TH ST	RIO LINDA	95.673.00	CA	2.00	1.00	Residential	Wed May 21 00:00..	113,263.00	38.69	-121.45
		Decimal	Varchar	Varchar	Decimal	Varchar	Decimal	Decimal	Varchar	Varchar	Decimal	Decimal	Decimal

First row contains unique titles ☒

Click on publish and Save.

Yellowfin

View

Model

Prepare

Test

Publish

Save

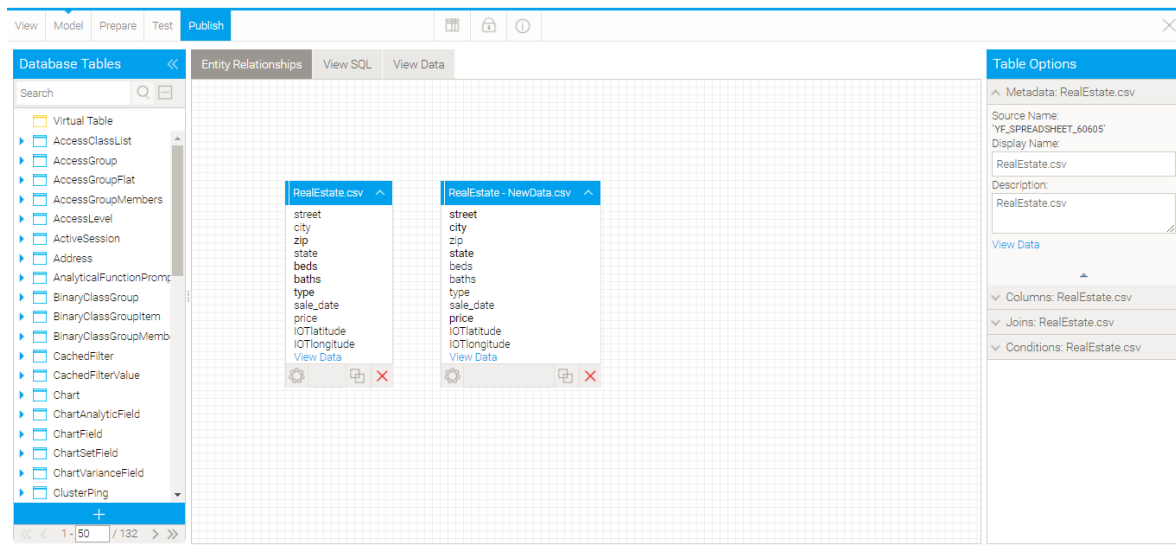
Delete

Metrics

Dimensions

	Metrics							Dimensions	
	baths	beds	zip	baths	beds	price	zip	type	type
1	1.00	2.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
2	2.00	3.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
3	2.00	4.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
4	2.00	3.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
5	1.00	2.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
6	2.00	3.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
7	2.00	4.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
8	2.00	3.00	95.638.00	1.00	1.00	59,222.00	95.638.00	Residential	Residential
9	1.00	3.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
10	2.00	3.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
11	2.00	4.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
12	2.00	3.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
13	2.00	4.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
14	2.00	4.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
15	1.00	4.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
16	2.00	3.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
17	2.00	3.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
18	2.00	3.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo
19	3.00	4.00	95.623.00	1.00	2.00	68,212.00	95.623.00	Residential	Condo

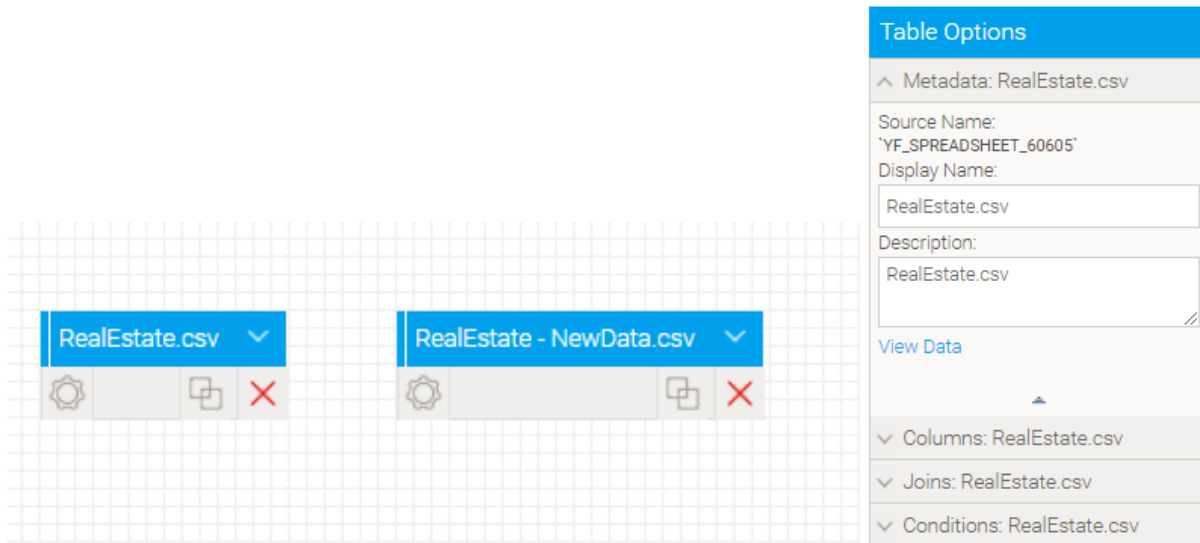
The drag and drop builder is used to build your relationship diagram by dragging tables onto your canvas.



Create Alias:

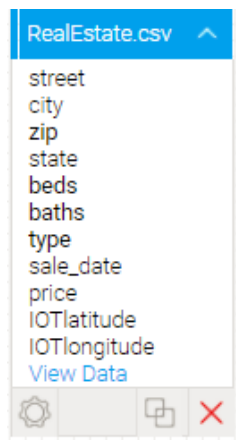
When adding more than one of the same table to a view Yellowfin automatically creates table aliases, since two tables cannot have the same name. An alias is created by updating the table name.

To change the table name you can update the display name in the options menu.



View Sample Data

If you wish to see example data from the table that is currently being updated you can click the view data link located in the main table properties section or on the table within the table on the entity builder.



Any conditions that have been applied to the table will be applied to the select statement for the example data. However, if the joins to the table have implied conditions these will not be included in the example select data.

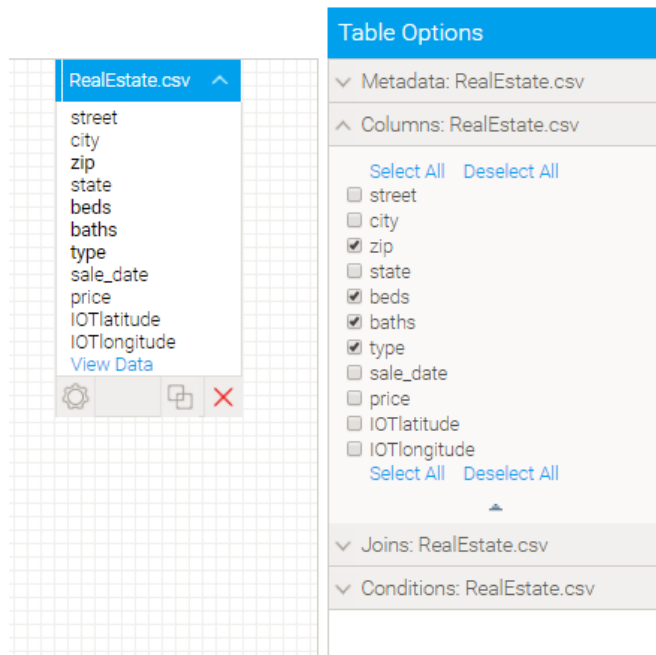
View Model Prepare Test Publish											
Database Tables											
<div> <div>Virtual Table</div> <div>AccessClassList</div> <div>AccessGroup</div> <div>AccessGroupFlat</div> <div>AccessGroupMembers</div> <div>AccessLevel</div> <div>ActiveSession</div> <div>Address</div> <div>AnalyticalFunctionPromp</div> <div>BinaryClassGroup</div> <div>BinaryClassGroupItem</div> <div>BinaryClassGroupMemb</div> <div>CachedFilter</div> <div>CachedFilterValue</div> <div>Chart</div> <div>ChartAnalyticField</div> <div>ChartField</div> <div>ChartSetField</div> <div>ChartVarianceField</div> <div>ClusterPing</div> </div>											
<div> <div>Rows: 20</div> <div>Refresh Data</div> <div>RealEstate.csv</div> </div>											
street	city	zip	state	beds	baths	type	sale_date	price	IOTlatitude	IOTlongitude	
3526 HIGH ST	SACRAMENTO	95838 CA	2	1	Residential	Wed May 21 00:00:00 EDT 2008	59222	38.6319130000000	-121.4348790000000		
51 OMAHA CT	SACRAMENTO	95823 CA	3	1	Residential	Wed May 21 00:00:00 EDT 2008	68212	38.4789020000000	-121.4310280000000		
2796 BRANCH ST	SACRAMENTO	95815 CA	2	1	Residential	Wed May 21 00:00:00 EDT 2008	68880	38.6183050000000	-121.4438390000000		
2805 JANETTE WAY	SACRAMENTO	95815 CA	2	1	Residential	Wed May 21 00:00:00 EDT 2008	69307	38.6168350000000	-121.4391460000000		
6001 MOMAHON DR	SACRAMENTO	95824 CA	2	1	Residential	Wed May 21 00:00:00 EDT 2008	81900	38.5194700000000	-121.4357680000000		
5828 PEPPERMILL CT	SACRAMENTO	95841 CA	3	1	Condo	Wed May 21 00:00:00 EDT 2008	89921	38.6625950000000	-121.3278130000000		
6048 OGDEN NASH WAY	SACRAMENTO	95842 CA	3	2	Residential	Wed May 21 00:00:00 EDT 2008	90895	38.6816590000000	-121.3517050000000		
2561 19TH AVE	SACRAMENTO	95820 CA	3	1	Residential	Wed May 21 00:00:00 EDT 2008	91002	38.5350920000000	-121.4813670000000		
11150 TRINITY RIVER DR UNIT 114	RANCHO CORDOVA	95670 CA	2	2	Condo	Wed May 21 00:00:00 EDT 2008	94905	38.6211880000000	-121.2705550000000		
7325 10TH ST	RIO LINDA	95673 CA	3	2	Residential	Wed May 21 00:00:00 EDT 2008	98937	38.7009090000000	-121.4429790000000		
645 MORRISON AVE	SACRAMENTO	95838 CA	3	2	Residential	Wed May 21 00:00:00 EDT 2008	100309	38.6376630000000	-121.4515200000000		
4085 PAWN CIR	SACRAMENTO	95823 CA	3	2	Residential	Wed May 21 00:00:00 EDT 2008	106250	38.4707460000000	-121.4589180000000		
2930 LA ROSA RD	SACRAMENTO	95815 CA	1	1	Residential	Wed May 21 00:00:00 EDT 2008	106852	38.6186980000000	-121.4358330000000		
2113 KIRK WAY	SACRAMENTO	95822 CA	3	1	Residential	Wed May 21 00:00:00 EDT 2008	107502	38.4822150000000	-121.4926030000000		
4533 LOCH HAVEN WAY	SACRAMENTO	95842 CA	2	2	Residential	Wed May 21 00:00:00 EDT 2008	108750	38.6729140000000	-121.3593400000000		
7340 HAMDEN PL	SACRAMENTO	95842 CA	2	2	Condo	Wed May 21 00:00:00 EDT 2008	110700	38.7000510000000	-121.3512780000000		

Table Options	
Metadata: RealEstate.csv	
Source Name:	YF_SPREADSHEET_60605
Display Name:	RealEstate.csv
Description:	RealEstate.csv
View Data	
Columns: RealEstate.csv	
Joins: RealEstate.csv	
Conditions: RealEstate.csv	

Select Table Columns

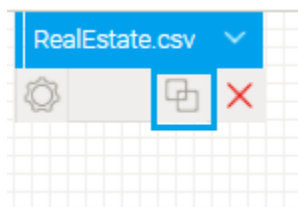
When tables are selected and joined together you have the option to add as many or as few of the columns from each of the tables into your view.

1. To add a field into your view click the table properties link to display the properties in the View Options pane.
2. Click the expand icon on the column section
3. Select the columns you wish to add (Use the Select All link to select all columns)
4. Columns selected will be displayed in bold within the table on the canvas – as depicted below.
5. You can also add columns from the table data view – see above. Simply click on the column to highlight the column – these will then be added to your column list.



Creating and editing a Join

To create a new join click on the Join icon on the table you wish to include in the join.



This will open the join popup, Select the join type and the table you wish to join to click Save and Close to save your join and return to the view canvas

New Join for RealEstate.csv - Google Chrome
129.146.100.110:7075/MIViewJoins.i4

Delete Join Save & Close

Join From
RealEstate.csv

Join Type
Inner Join
Cardinality
One to One

Join To
RealEstate - NewData.csv

Join Details

☐ type Equal to type

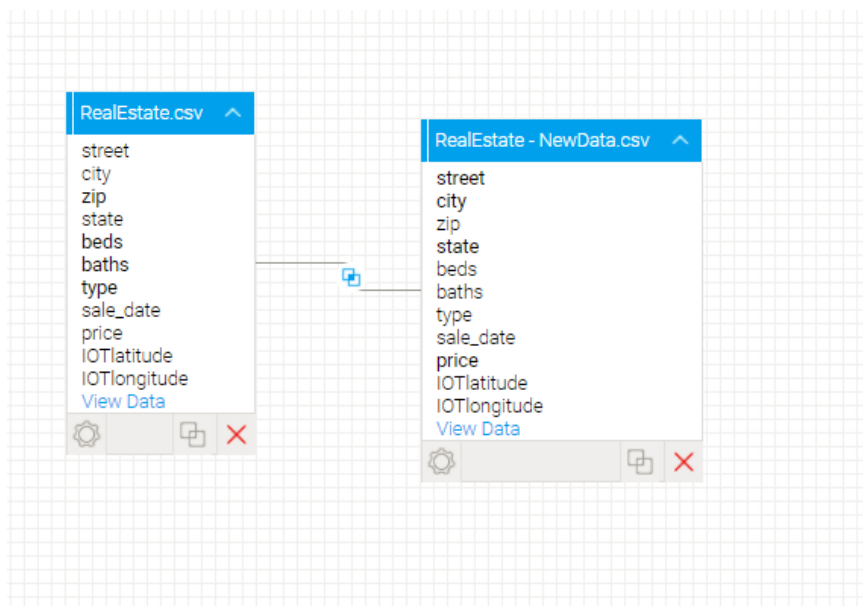
Delete Move Up Move Down

type Equal to -- Select Column -- Add

Join Logic

Joining RealEstate.csv to RealEstate - NewData.csv
where records in RealEstate - NewData.csv must match
and type is Equal to type

The tables will now have a join displayed as a line between them.



Click on prepare it will prepare the whatever joined data

test1									
	Metrics				Dimensions				
	baths	beds	zip	price	type	city	state	street	
1	1.00	2.00	95.838.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
2	1.00	3.00	95.823.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
3	1.00	2.00	95.815.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
4	1.00	2.00	95.815.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
5	1.00	2.00	95.824.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
6	2.00	3.00	95.842.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
7	1.00	3.00	95.820.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
8	2.00	3.00	95.673.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
9	2.00	3.00	95.838.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
10	2.00	3.00	95.823.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
11	1.00	1.00	95.815.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
12	1.00	3.00	95.822.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
13	2.00	2.00	95.842.00	59,222.00	Residential	SACRAMENTO	CA	3526 HIGH ST	
	Decimal	Decimal	Decimal	Decimal	Varchar	Varchar	Varchar	Varchar	

Once you can click on Test it will open create test report popup window click continue it was navigating to the new window.

View

Model

Prepare

Test

Publish

Database Tables

Virtual Table

AccessClassList

AccessGroup

AccessGroupFlat

AccessGroupMembers

AccessLevel

ActiveSession

Address

AnalyticalFunctionPromp

BinaryClassGroup

BinaryClassGroupItem

BinaryClassGroupMemb

CachedFilter

CachedFilterValue

Chart

ChartAnalyticField

ChartField

ChartSetField

ChartVarianceField

ClusterPing

Entity Relationships

View SQL

View Data

RealEstate.csv

street

city

zip

state

beds

baths

type

sale_date

price

IOTlatitude

IOTlongitude

RealEstate - NewData.csv

street

city

zip

state

beds

baths

type

sale_date

Create Test Report

You will leave the view builder to write your test report.

Navigate back to make more changes to this view or to publish it.

Got It!

Continue

Reports

Having created our view we are now ready to create reports using the Report Writer. When creating a new report you will have begin with an initialization step. The step is required for you to select the source system and the view you wish to access, as well as the type of builder you wish to use.

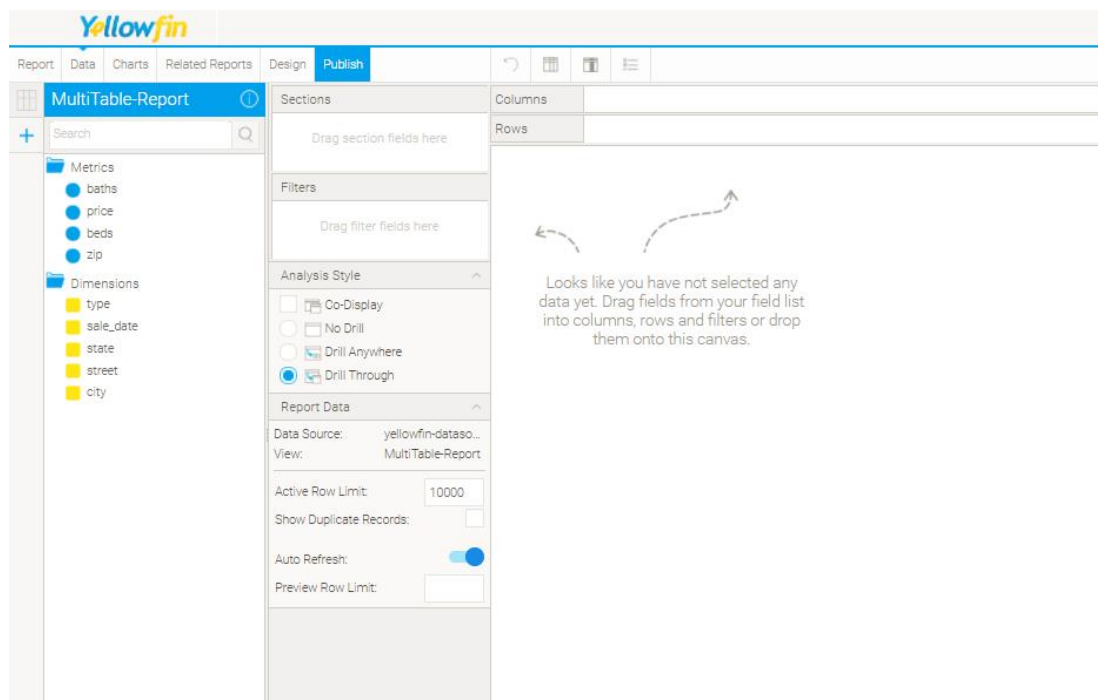
Create

This section walks you through starting the report building process, including selecting the type of builder, and the view.

Data

This will walk you through building a basic report.

On the left you will see a list of folders, expand the **Metrics** and **Dimensions** folder in order to access time related fields.



Drag and drop the **Year** field into the preview area, as pictured here.

You could also drag it directly into the **Column** or **Rows** list if you prefer. Dragging into the Columns list creates a Year column that goes down the page, where the Rows creates a Year row that goes across the page. And expand all the fields

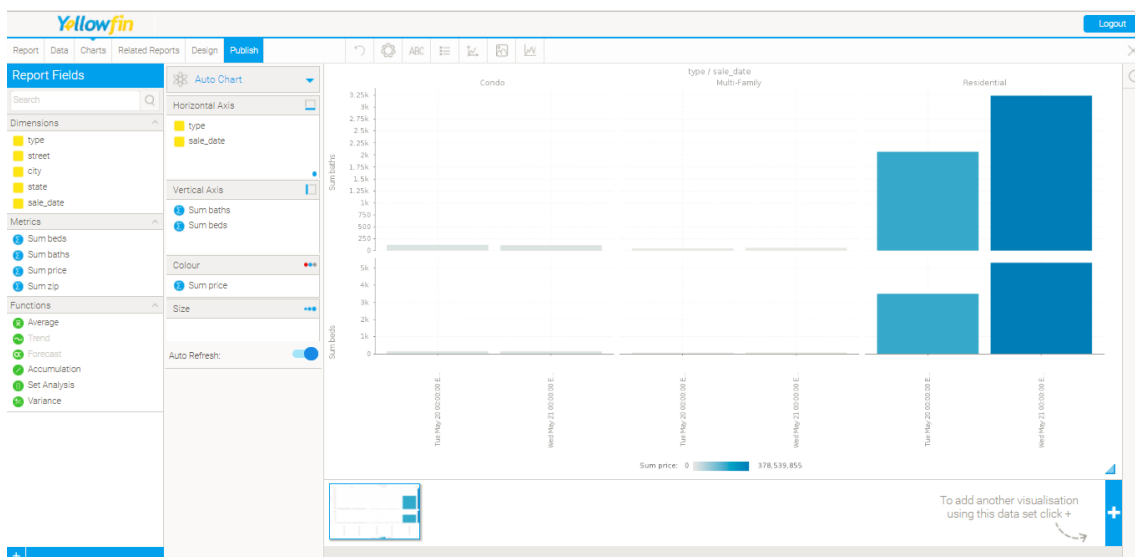
type	Sum price	Sum beds	Sum baths	street	city	state	sale_date	Sum zip
Condo	71,000.00	2.00	1.00	9512 EMERALD PARK DR Unit 3	ELK GROVE	CA	Tue May 20 00:00:00 EDT 2008	95.824.00
Condo	86,921.00	3.00	1.00	8828 PEPPERMILL CT	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	95.841.00
Condo	100,309.00	3.00	1.00	945 MORRISON AVE	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	95.841.00
Condo	110,700.00	2.00	2.00	7340 HANDEN PL	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	95.842.00
Condo	114,800.00	2.00	2.00	4033 MCCLOUD DR	SACRAMENTO	CA	Tue May 20 00:00:00 EDT 2008	95.842.00
Condo	124,100.00	3.00	2.00	9 PASTURE CT	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	95.834.00
Condo	138,000.00	4.00	2.00	6272 LONGFORD DR Unit 1	CITRUS HEIGHTS	CA	Tue May 20 00:00:00 EDT 2008	191.242.00
Condo	143,500.00	2.00	2.00	6333 PRIMROSE DR Unit 16A	FAIR OAKS	CA	Tue May 20 00:00:00 EDT 2008	95.828.00
Condo	143,500.00	3.00	2.00	1035 MILLET WAY	SACRAMENTO	CA	Tue May 20 00:00:00 EDT 2008	95.834.00
Condo	160,000.00	2.00	1.00	6349 AIZENBERG CIR	ELK GROVE	CA	Tue May 20 00:00:00 EDT 2008	95.824.00
Condo	166,896.00	2.00	1.00	8718 ELK WAY	ELK GROVE	CA	Wed May 21 00:00:00 EDT 2008	95.824.00
Condo	167,788.00	2.00	2.00	4524 LOCH HAVEN WAY	SACRAMENTO	CA	Tue May 20 00:00:00 EDT 2008	95.842.00
Condo	166,000.00	2.00	2.00	4500 TIPPWOOD WAY	SACRAMENTO	CA	Tue May 20 00:00:00 EDT 2008	95.842.00
Condo	170,000.00	2.00	1.00	6417 SARA ST	ELK GROVE	CA	Wed May 21 00:00:00 EDT 2008	95.824.00
Condo	176,593.00	2.00	2.00	4620 BOMARK WAY	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	95.842.00
Condo	181,972.00	2.00	2.00	6332 SANDSTONE ST	CARMICHAEL	CA	Wed May 21 00:00:00 EDT 2008	95.808.00
Condo	186,000.00	2.00	2.00	9626 MALEVILLE AVE	CARMICHAEL	CA	Tue May 20 00:00:00 EDT 2008	95.808.00
Condo	186,810.00	2.00	2.00	11150 TRINITY RIVER DR Unit 114	RANCHO CORDOVA	CA	Wed May 21 00:00:00 EDT 2008	191.340.00
Condo	196,500.00	2.00	1.00	8708 MESA BROOK WAY	ELK GROVE	CA	Wed May 21 00:00:00 EDT 2008	95.824.00
Condo	200,000.00	2.00	2.00	8907 ELLERSBLEE DR	CARMICHAEL	CA	Wed May 21 00:00:00 EDT 2008	95.808.00
Condo	206,000.00	3.00	2.00	17 SERASPI CT	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	95.834.00
Condo	217,500.00	2.00	2.00	4533 LOCH HAVEN WAY	SACRAMENTO	CA	Wed May 21 00:00:00 EDT 2008	191.340.00
Condo	223,088.00	2.00	1.00	8373 BLACKMAN WAY	ELK GROVE	CA	Wed May 21 00:00:00 EDT 2008	95.824.00
Condo	228,000.00	2.00	1.00	6387 GRANITE FALLS CT	ELK GROVE	CA	Tue May 20 00:00:00 EDT 2008	95.824.00
Condo	227,887.00	2.00	1.00	6837 CORTE DORADO CT	ELK GROVE	CA	Wed May 21 00:00:00 EDT 2008	95.824.00
Condo	230,000.00	2.00	2.00	8164 CHENIN BLANC LN	FAIR OAKS	CA	Tue May 20 00:00:00 EDT 2008	95.828.00
Condo	232,500.00	4.00	2.00	6238 LONGFORD DR Unit 1	CITRUS HEIGHTS	CA	Wed May 21 00:00:00 EDT 2008	191.242.00
Condo	234,000.00	2.00	2.00	6340 BIRK WAY	SACRAMENTO	CA	Tue May 20 00:00:00 EDT 2008	95.836.00
Condo	236,000.00	2.00	2.00	81 ANJOU CIR	SACRAMENTO	CA	Tue May 20 00:00:00 EDT 2008	95.836.00

Charts

Click on the **Charts** link in the main navigation bar in order to progress to the **Chart Builder** step.

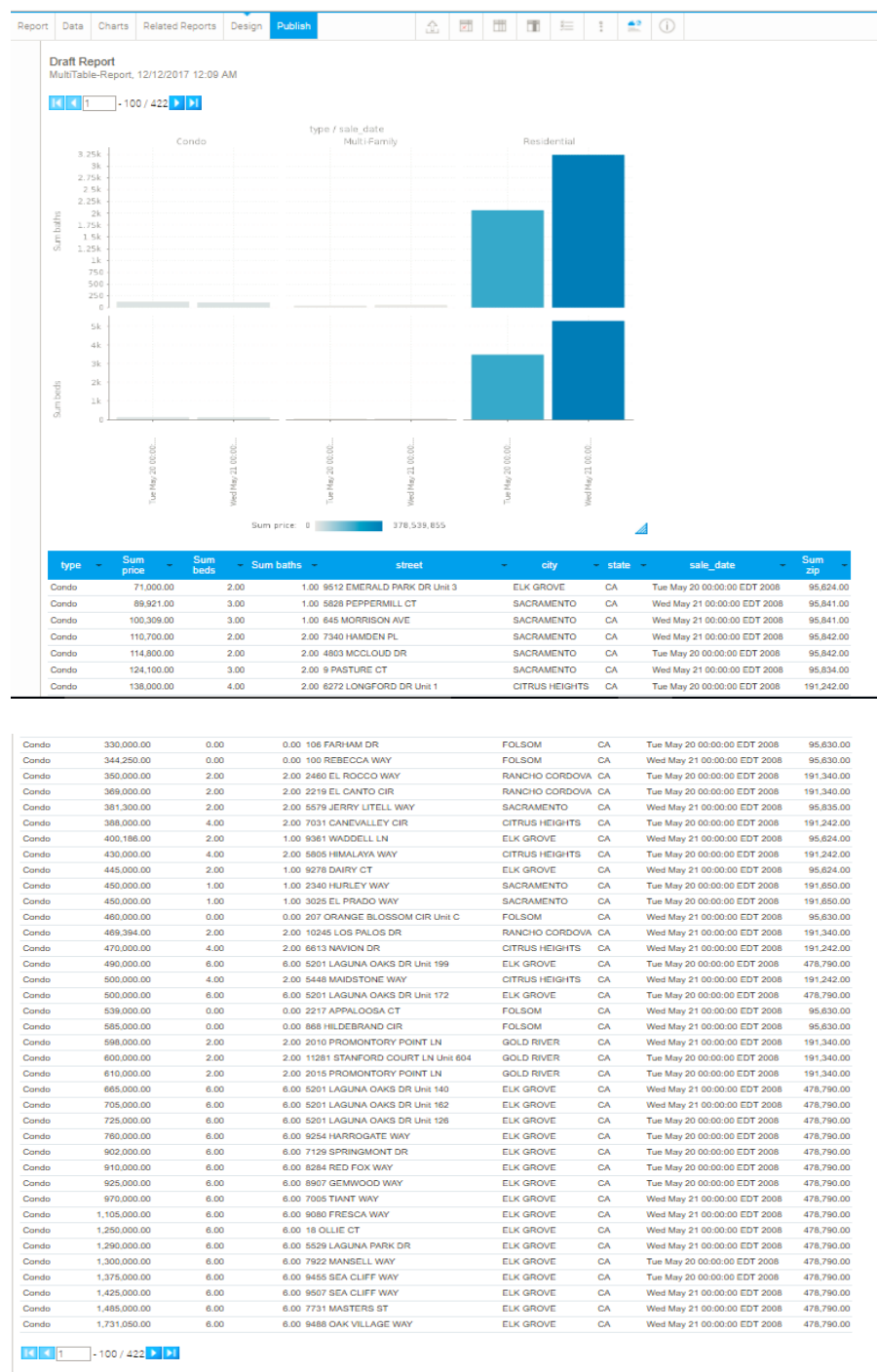
You will now have a list of fields on the left side of the builder that are available from the table you defined on the Data step.

Drag fields into the **Horizontal Axis** component and **Vertical Axis** component of the **Auto Chart** builder.



Design

The Design page allows you to format the report, set up a multi-chart canvas, and other functions.



Before you publish report, you can close report tab, and create Content folder in the Administrator admin console.

Content Folders

Content is stored within a two tier folder structure of Folders and Sub Folders.

- **Folders** are used to hold and split Sub Folders into groups. They do not contain content directly.
- **Sub Folders** are located within a defined Folder and are used to store content with specified function and access permissions.

The content types that are stored in this structure are Reports, Dashboard Tabs, and Storyboards.

Click the **Add** button under the Content Folders list in the Admin Console. You will now be taken to the Folder setup page, where you will need to define the following:

this easy.

Configure and manage
your Yellowfin
tailor your Yellowfin
.

to save your changes
figure your
nt.

eed help?

it the [Yellowfin](#)
community or [wiki](#) to find the
swers you are looking for.

Days Left
pires

168 Days

Yellowfin Users

Versus Licence 1 / 1

Last 30 Days

1

Accessed last 30 days

Accessed 0 / 0

Head last 30 days

Read 0 / 0

Data Sources

Views

Users

Roles

User Groups

Content Folders

Search Folders

Q

Content Folder

Content Sub Folder

No Content Folders found

Add

Field Folders

Reference Codes

Configuration

Content Settings

Images and Maps

Email Template

Administration

Session Management

Schedule Management

Dashboard Management

Licence Management

Background Execution

Plugin Management

System Information

Export

Import

Fill the name, description and select folder hierarchy click on drop down and select top level then Submit.

New Folder

Description

Yellowfin-folder

Yellowfin save pages

Folder Hierarchy

This folder will be used to contain sub folders which will, in turn, contain content.

Top Level

Advanced settings

Submit

Once at least one Folder has been created, click the **Add** button under the Content Folders list in the Admin Console to start defining Sub Folders. You will now be taken to the same Folder setup page, where you will need to define the following:

New Folder

Description

User Access

Yellowfin-SubFolder

Yellowfin-SubFolder

Folder Hierarchy

This sub folder will be stored within the selected folder, and will contain content.

Yellowfin-folder

Advanced settings

Submit

To make changes to a Folder or Sub Folder simply locate it on the Admin Console page and click on its name.

Content Folders	
Search Folders	
Content Folder	Content Sub Folder
Yellowfin-folder	✓
	Yellowfin-SubFolder ✓
Add	

Saving a Report

Each of the sections is described below

Save View

Details

MultiTable-Report

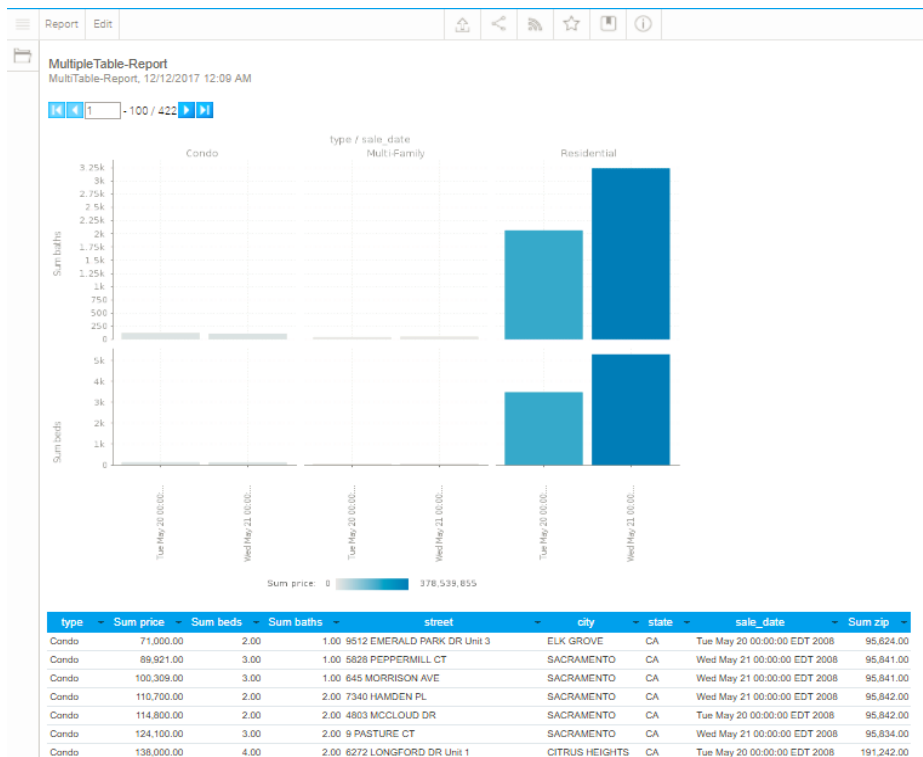
multiple table to report the data

Yellowfin-folderYellowfin-SubFolder

+ Add tags

Save and Publish

The Report Save menu has a range of settings that can be applied to the report.

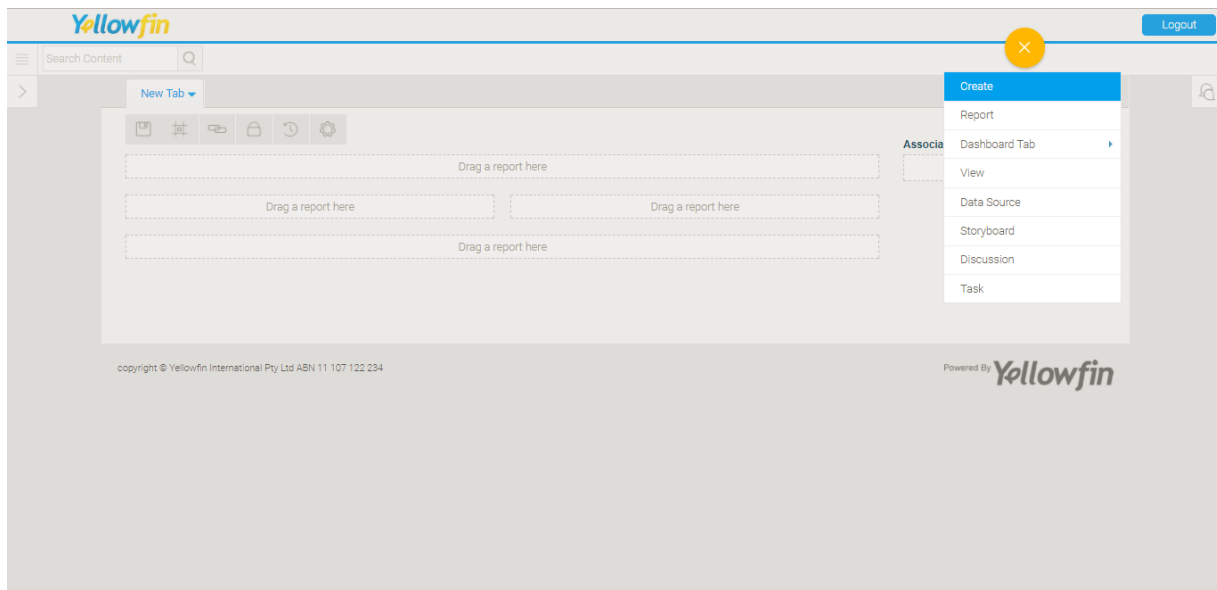


Dashboard

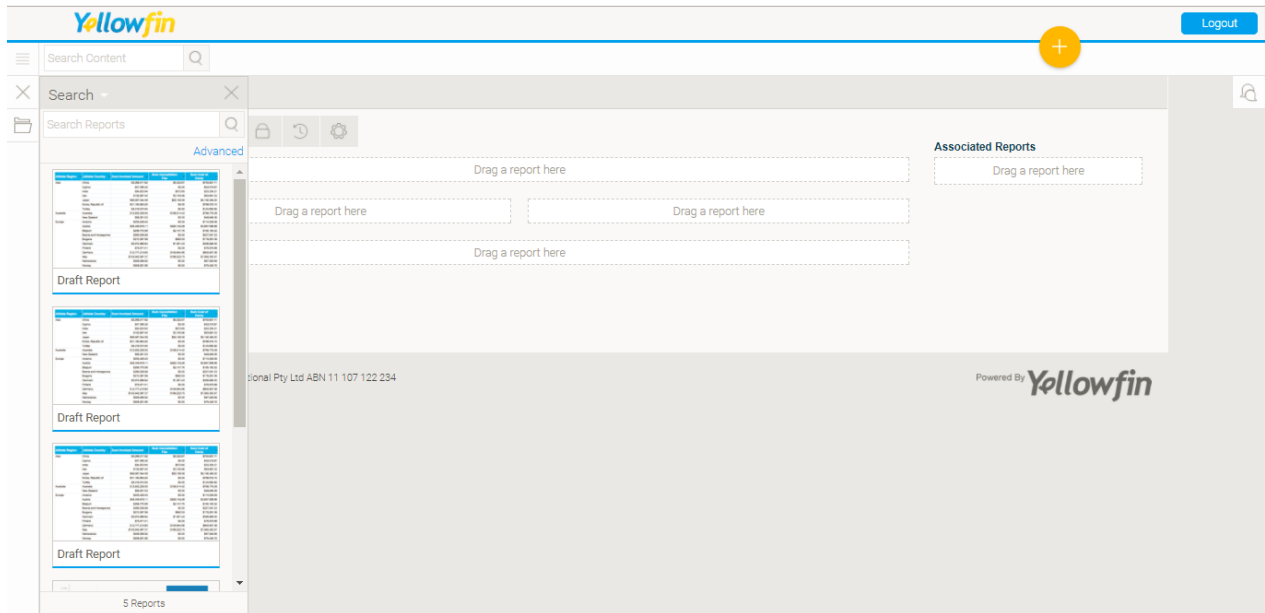
Once your reports have been built you will be able to create a new dashboard tab and add them to it. A dashboard is a way to present reports to users in a way that lets them quickly scan all their key metrics without having to open each report individually. As such when designing a dashboard deciding what gets displayed is critical to providing users with dashboards that help them in their jobs.

Create

1. To create a new dashboard tab click the Create item in the main navigation bar of the system, and select Dashboard Tab.
2. This will open a menu of tab types - from which you should choose a Standard Tab.

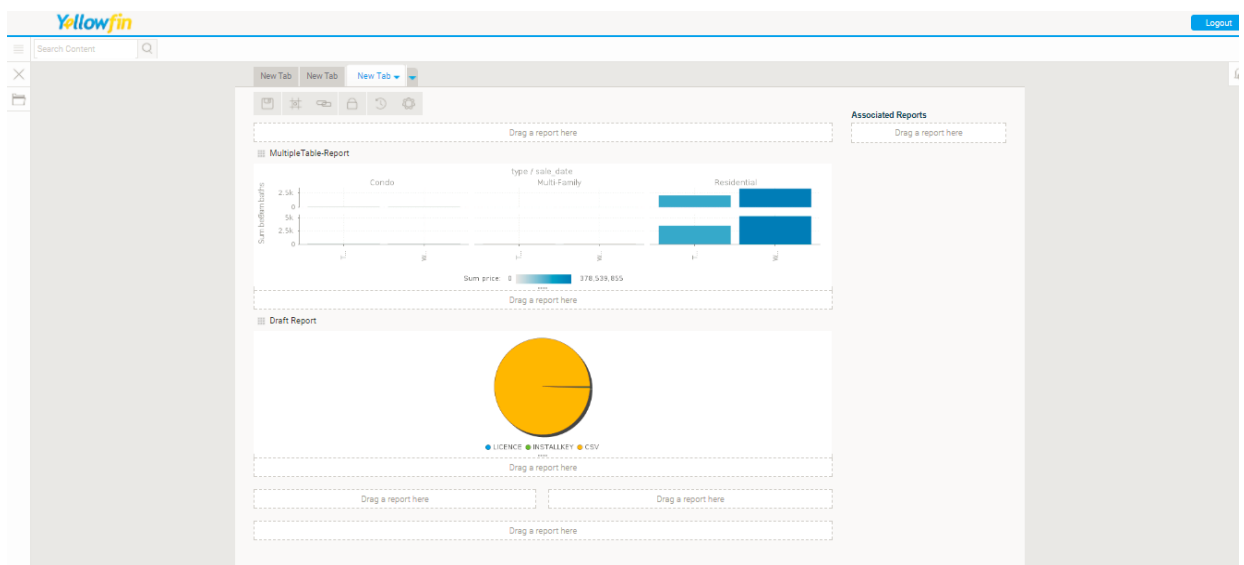


3. You will now see a blank tab. Search for Pie in the Report Search panel on the left.
4. Drag the report to the top portlet area on your tab, as demonstrated here.



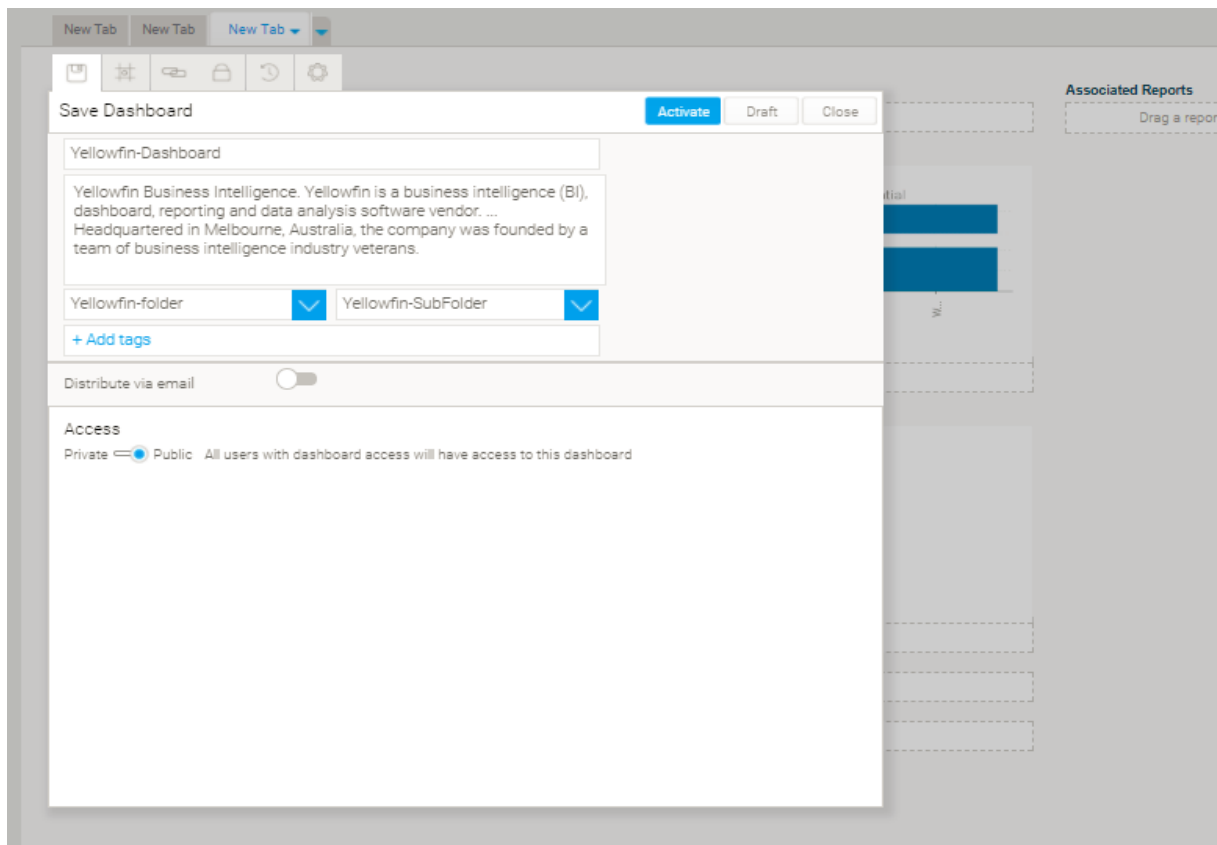
5. Your chart will now appear on the dashboard tab.

6. Resize the report by dragging the bottom edge of it downward until the data is easier to read.



7. Click the Save button to save this Dashboard tab. Type in **Tutorial** as the name of the tab and change the sub category to **Tutorial**.

8. After that click **Activate** to save and activate the tab.



9. The Tutorial tab is now published and ready for day to day use.

