

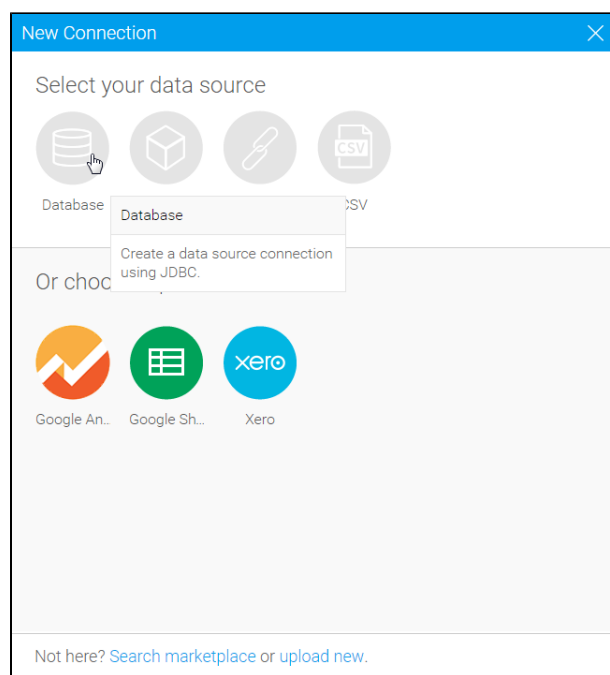
Understanding Source Connection Parameters

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Overview

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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.



This page will be dedicated to exploring parameters available when connecting to a database.

See [Third Party Connectors](#) for or [CSV Data Imports](#) for more information on other types of connection.

New Connection Window

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

The 'New Connection' dialog box features a blue header with a close button. Below the header is a progress bar with three steps: 'Connection Setti...', 'Create View', and 'Analyse'. The main area contains five input fields: 'Name:', 'Description:', 'Database Type:' (a dropdown menu showing '-- Select --'), 'Username:', and 'Password:'. At the bottom, there is a blue button labeled 'Create View' 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 Steps

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

The 'New Connection' dialog box is now in the 'Advanced Connection Editor' step. It shows the following fields: 'Name:' (Ski Team Data), 'Description:' (Tutorial data based on the Ski Team business.), 'Database Type:' (Microsoft SQL Server), 'Include Schema in SQL:' (checked), 'Database Host:' (localhost), 'Use Named Instance:' (unchecked), 'Database Port:' (1433), 'Database Name:' (NewSkiTe), 'Database Authentication:' (SQL Auth), and 'SSL Required:' (Disabled). A context menu is open over the 'Database Name' field, showing options: 'Advanced Connection Editor', 'Test Connection' (highlighted with a mouse cursor), 'Create View', 'Save & Close', and 'Cancel'. At the bottom, there is a blue button labeled 'Create View' with a dropdown arrow.

The following options may be available;

1. **Create View** - this will allow you to continue onto the New View window. See [Creating a View](#) for more information.
2. **Advanced Connection Editor** - this will take you to the advanced options available for your connection, otherwise accessed via the Admin Console.
3. **Test Connection** - this will allow Yellowfin to test the connection information provided to ensure that the database can be reached.
4. **Save & Close** - this will allow you to save your connection and return to the page you were previously on.
5. **Cancel** - this will allow you to close the New Connection window without saving your connection.

Advanced Connection Editor

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In order to edit the advanced options of a new or existing connection you will need to access its connection details through either the [Administration Console](#) or the [New Connection Window](#) options. From here you will have a range of options, split into the groups explored below.

Connection Description

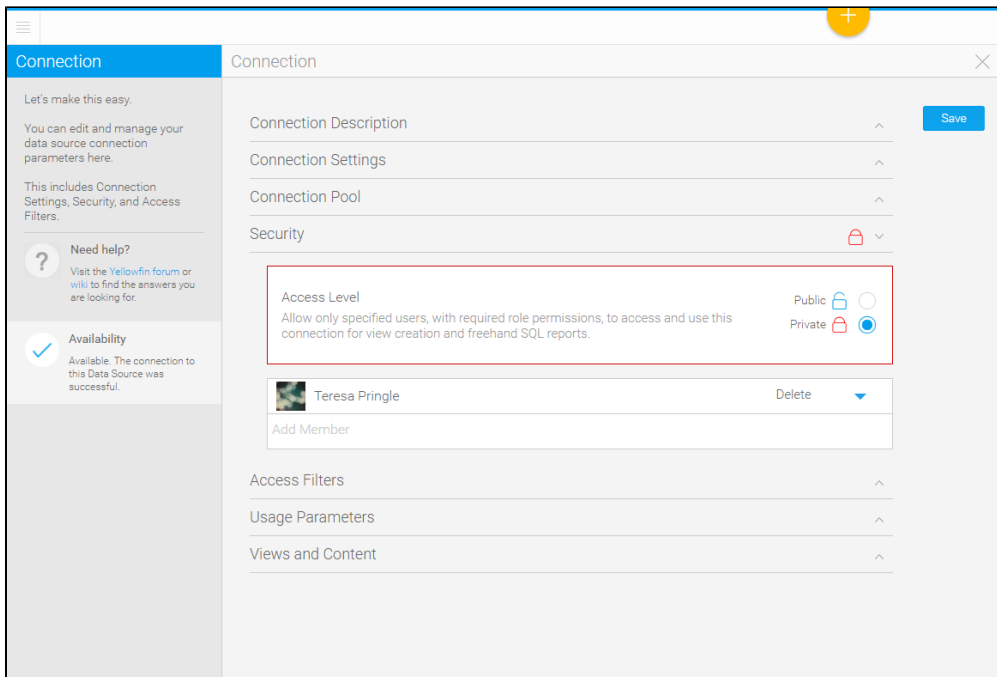
This section allows you to define the basic metadata for your connection; **Name**, **Description**, and **Tags**. These items should be descriptive as users will need them in order to identify the connection when building content.

The screenshot displays the 'Advanced Connection Editor' window. On the left is a sidebar with a 'Connection' header and a 'Database' icon. The main area is titled 'Connection Description' and contains a 'Name' field with the value 'Ski Team Data', a 'Description' field with the value 'Tutorial data based on the Ski Team business.', and a '+ Add tags' button. Below these fields is a list of connection settings: 'Connection Settings', 'Connection Pool', 'Security' (with a lock icon), 'Access Filters', 'Usage Parameters', and 'Views and Content'. A 'Save' button is located in the top right corner of the main area.

Connection Settings

These are the connection parameters that need to be defined in order for Yellowfin to know how to access your database.

You will be presented with a list of parameters that relates to the type of database you have chosen to connect to, as each database may require different options.



There are two main options available:

1. **Public:** allow all users with required role permissions to access and use this connection for view creation and freehand SQL reports.
2. **Private:** allow only specified users, with required role permissions, to access and use this connection for view creation and freehand SQL reports.

If you set the data source to **private** you will then need to define specific users, or groups of users, to have access to the connection. Each user can be assigned one of the following levels of access;

1. **Read:** allows users to see views based on this data source in the data sources and views page, and when creating a report.
2. **Update:** allows users to create, edit, or copy either a view or freehand SQL report based on this data source, as well as the above **Read** level of access.
3. **Delete:** allows the user to **Delete** this data source connection, as well as both of the above **Read** and **Update** levels of access.

Access Filters

This list allows you to add new, and manage existing, access filters.

+

Connection

Connection

Let's make this easy.

You can edit and manage your data source connection parameters here.

This includes Connection Settings, Security, and Access Filters.

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Need help?

Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.

✓

Availability

Available. The connection to this Data Source was successful.

Connection Description

Connection Settings

Connection Pool

Security

Access Filters

Name

None Found

Configure Reference Types

Add

Usage Parameters

Views and Content

Save

See [Restricting Data with Access Filters](#) for more information.

Usage Parameters

This section allows you to define some general settings related to the use of this data source.

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Connection

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✓

Availability

Available. The connection to this Data Source was successful.

Usage Parameters

Max Rows Returned

Specify if there should be a limit to the number of rows returned by queries run on this connection.

Max Rows Returned

10,000

Define a limit for the number of rows returned by queries run on this connection.

Writable

Specify if the system can write to this database, rather than just read.

Time zone

Specify the time zone associated with this database connection and any related schedules.

Australia

Sydney (+10:00)

Broadcast

Specify if content based on this connection can be broadcast.

Subscribe

Specify if content based on this connection can be subscribed to.

Data Profiling

Data Profiling is available in views using this data source.

Client

Data Source

Inherit Access Filters from client source

Inherit Access Filters from client source

Views and Content

Views & Content

This allows you to view a list of content that has been created based on this data source connection.

Connection

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✓

Availability

Available. The connection to this Data Source was successful.

Connection

Security


Access Filters

Usage Parameters

Views and Content


Content Usage

Ski Team117 Reports




Agency Benchmark

Top N Agencies compared to all other Agencies by demographic



Agency Sales over Time

View agency sales by agency type over time.



Agency Sales over Time

View agency sales by agency type over time.

Rank	Agency	Score
1	Agency A	95
2	Agency B	85
3	Agency C	75
4	Agency D	65
5	Agency E	55
6	Agency F	45
7	Agency G	35
8	Agency H	25
9	Agency I	15
10	Agency J	5

Athlete

An athlete KPI report used to highlight KPI dashboard tab functionality

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