View Management

- Saving
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- Caching

Saving

top Saving a view enables you to make the view active. Only views which are active are able to be used by report writers for report creation.

- 1. From the view summary page click the save link
- 2. Complete the form most of the information may already have been completed.
- 3. Update the status of the view from Draft to Active.
- Note: Only ACTIVE views are available for reporting by end users.
- 4. Click Save to save the view as Active and return to the View Summary page.

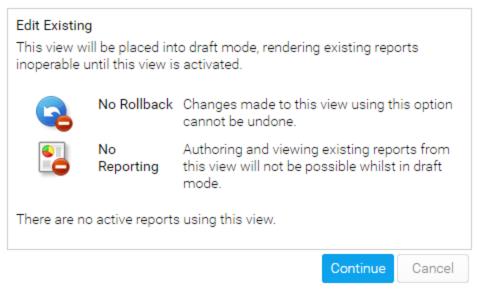
Editing

top If you wish to make changes to a view once it has been made active, you will have to take it through the change management process. This is done to ensure that the view is not corrupted if being used for reports. For example, a corrupted view could result in columns getting deleted, which are being used in existing reports.

- 1. To edit a view click the edit link from the view summary page. This link is only visible if the view is ACTIVE.
- 2. Select if you wish to 'clone' or 'edit the existing' view.
- If you edit the existing view then no users will be able to run reports against that view until you have activated it. Any changes you make to the view may impact existing reports and corruption may occur. You will also not be given the option to rollback the view to its previous state.

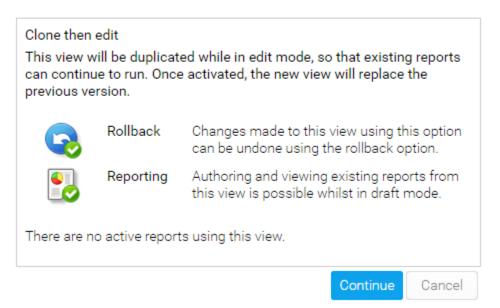
Edit View

Edit Type: 🔍 Clone 🖲 Edit Existing



If you clone a view then the changes are made independently of report users. On activation the view will replace the previous version. Edit View

Edit Type: 🖲 Clone 🔍 Edit Existing



3. Edit the view as required. Save and activate once changes have been completed.

This is a cloned version of an existing view. Once you activate this version, it will replace the existing version												
			imn	nediately.								
General Columns	s Data	SQL	Elements	Security	Reports	Cache						
View Name: Ski Team (Clone)								×				
Business Description: This is a tutorial view for training and demo purposes. Technical Description: Intended Audience:												
Current Status:.	🎭 Draft				Test Report							
Creation Date:	31/5/2016	31/5/2016										
Active Report Count:	0											
Data Source:	Ski Team (You cannot sv	wap the d	lata source in a clo	oned view)								
	🔁 Downloa	🔁 Download PDF documentation										
	🖻 Downloa	ad DOC	documentatic	n								
Create a Translation File												
Import Translated Content												
						Close	Save	Activate				

4. When activating the view you will be prompted to update the view name and add a description of the changes made. This information will be available when rolling back the view.

Activate View

Do you wish to activate this view?

Activating this vi	ew will replace the previous v	ersion imm	ediately.
There are no active rep	orts using the parent version	of this view	
View Name:	Ski Team		
Change Description:	Added fields: - Converted Invoiced Rate - Conversion Date - Conversion Flag		//
		Activate	Cancel

Rollback

top If you have made changes to a view via a clone, once it's saved you will have the option to roll back to the previous version. You can rollback as many times as you've made changes.

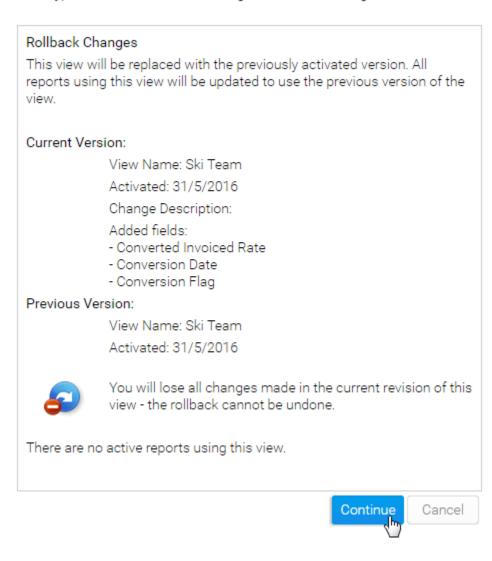
3

1. <u>Click on the Rollback link found on the View Summary page. This will only be enabled if a clone has been saved.</u>

General	Columns	Data	SQL	Elements	Security	Reports	Cache						
									×				
View Name	e.	Ski Team											
Business D Technical D Intended Au	escription:	This is a tutorial view for training and demo purposes.											
Current Status:. 🕜 Active Create Report													
Creation Da	ate:	31/5/2016	31/5/2016										
Active Repo	ort Count:	0											
Data Source		Ski Team (You cannot	swap the c	lata source in a clo	oned view)								
Last Modifi	ed:	31/5/2016	5										
Last Modifi	ed By:	Teresa Pri	ngle										
Change Des		Added fiel - Converte - Conversi - Conversi	d Invoic on Date	ed Rate									
		🔁 Downlo	ad PDF	n									
		Downlo											
							Close	Edit	Rollback				
									Jhr.				

 You will now notice there is an extra option on the Edit View page allowing you to view the change description of the current view version and Rollback those changes.
Edit View

Edit Type: O Clone O Edit Existing O Rollback Changes



Deleting

top

- 1. To delete a view select the view from the views list by ticking the checkbox. Click the Delete link.
- 2. You will have to confirm your deletion. The confirm page will show you how many active reports are currently attached to the view. If you delete the view all these active reports will be deleted as well.

3. Click delete to confirm deletion Delete View

Please confirm that you wish to delete the selected views. Note that any reports written against these views will also be deleted.

View	Reports	Sub Queries	View	s
Ski Team	0	0	0	
			Ok	Cancel

Copying

top If you wish to copy a pre-existing view and use it as a base for a new view you can do so by selecting the view you wish to copy from the view list and clicking the copy link. This will copy the view and take you into edit mode.

Caching

top View caching allows you to store the data a view returns into a nominated writable database (including the in-memory database). To do this you must already have a writable source connection established.

1. On the Cache tab of the view summary page, click on the Create a cached copy of this view link.

General	Columns	Data	SQL	Elements	Security	Reports	Cache		
									×
	not cached.								
<u>Create a ca</u>	ched copy of t	this view							
							Close	Save	Activate
You will no	w have a se	ries of op	otions to	configure. S	elect the na	ame of the o	lata store y	ou have set	up.
General	Columns	Data	SQL	Elements	Security	Reports	Cache		
									×
Data Car	che Details								
Data Store:		Select			▼ 🚺				
Incrementa	l Load:	O Yes (No						
Refresh Da	ta:	Manu	al 🔍 Sc	heduled					
								Save	Cancel
							Close	Save	Activate

3. Decide if you wish the caching to be incrementally loaded. If Yes, you will be prompted to select an incremental load key from the view. This field must be an incrementing column as it will be used to determine which records are new since the previous refresh.

General	Columns	Data	SQL	Elements	Security	Reports	Cache		
									×
Data Cac	he Details								
Data Store:		CSV Stor	re		v ()				
Incrementa	l Load:	• Yes	🛛 No						
Incrementa	l Load Key:	Select			v ()				
Refresh Data:		Select Age at Ca Athlete C Athlete II Athlete L Athlete L Camp Da	amp Counter D atitude ongitude		•			Save	Cancel
		Camp ID Camp Ra Campaig Cancella Cost of C Date of E Days Bet End Date Exchang Invoice E Invoiced Invoiced	ating In ID tion Fee Camp Birth Ween Inv e Rate Stimate (Pref Cui		p		Close	Save	Activate
		Invoiced	Date	6	-				

4. Once you have set the refresh schedule, click Save. The view is now set to regularly cache its data, but will wait for the scheduled date to populate the first set of data. If you wish to populate the data manually click the Populate Data Now link.

General	Columns	Data	SQL	Elements	Security	Reports	Cache		
									×
Data Cac	he Details								
Data Store:		CSV Stor	e		v ()				
Incrementa	l Load:	• Yes (No						
Incrementa	l Load Key:	Invoiced	Date		•				
Refresh Dat	ta:	Manual	al 🖲 So	heduled					
Refresh S	Schedule								
Frequency:		Weekly			•				
Day:		Saturday		•					
Local Run T		17 ▼ : 30 Australia/\$		+10:00)					
								Save	Cancel
							Close	Save	Activate

5. Yellowfin will now populate the data. Depending on the number of records and the complexity of the view logic, this task may take several minutes.

		Cache	Reports	Security	Elements	SQL	Data	Columns	General		
×											
🕜 This view is cached.											
🛛 Delete						e	CSV Store Yes	l Load:	Data Store: Incremental Load: Incremental Load Key:		
					b	Data Nov	<u>Populate</u>				
Activate	Save	Close									

6. You can now click on the data tab to view a snapshot of the data.

General	Columns	Data	SQL	Elements	Reports	Cache			
	/iew s view is refres ated: 31/5/2016			ST)					×
Rows: 20	Refresh Data								
Demograp Family	hic Age at Ca 30	mp Age 30 -	e Group a 34	Invo 3826	i <mark>ced Amount</mark> .56	Cancellation	Fee Invoice Estimate	Currency Code	Cost of ▲ 4134.08
Family	18	15 -	19	4230	.43	0.00	6726.72	EUR	4134.08
Family	36	35 -	39	4018	.91	0.00	6390.38	EUR	4086.03
Adventure	31	30 -	34	5850	.74	0.00	11526.28	EUR	5521.54
Sport	18	15 -	19	3355	.86	335.59	4043.20	CAD	2553.60
Luxury	30	30 -	34	2692	1.71	0.00	30348.00	CAD	26490.0
Family	56	55 +	-	3489	.92	0.00	4256.00	CAD	2584.00
Adventure	31	30 -	34	6610	.07	0.00	10510.52	EUR	4824.86
4									•