

# View Management

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## Saving

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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

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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

### Edit Existing

This view will be placed into draft mode, rendering existing reports inoperable until this view is activated.



**No Rollback** Changes made to this view using this option cannot be undone.



**No Reporting** Authoring and viewing existing reports from this view will not be possible whilst in draft mode.

There are no active reports using this view.

Continue

Cancel

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

### Clone then edit

This view will be duplicated while in edit mode, so that existing reports can continue to run. Once activated, the new view will replace the previous version.



**Rollback** Changes made to this view using this option can be undone using the rollback option.




**Reporting** Authoring and viewing existing reports from this view is possible whilst in draft mode.

There are no active reports using this view.

Continue

Cancel

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 immediately.

GeneralColumnsDataSQLElementsSecurityReportsCache


×

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

Active Report Count: 0

Data Source: Ski Team  
(You cannot swap the data source in a cloned view)

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[Create a Translation File](#)


[Import Translated Content](#)

CloseSaveActivate

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 view will replace the previous version immediately.

There are no active reports using the parent version of this view.

View Name:

Change Description: 

Added fields:

- Converted Invoiced Rate
- Conversion Date
- Conversion Flag

ActivateCancel

## Rollback

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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.

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

GeneralColumnsDataSQLElementsSecurityReportsCache

×

View Name: Ski Team

Business Description: This is a tutorial view for training and demo purposes.

Technical Description:

Intended Audience:  
[Edit Metadata](#)

Current Status: ☒ Active 

Create Report

Creation Date: 31/5/2016

Active Report Count: 0

Data Source: Ski Team  
(You cannot swap the data source in a cloned view)

Last Modified: 31/5/2016

Last Modified By: Teresa Pringle

Change Description: Added fields:  
- Converted Invoiced Rate  
- Conversion Date  
- Conversion Flag

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CloseEditRollback

2. 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: ☐ Clone ☐ Edit Existing ☒ Rollback Changes

#### Rollback Changes

This view will be replaced with the previously activated version. All reports using this view will be updated to use the previous version of the view.

#### Current Version:

View Name: Ski Team

Activated: 31/5/2016

Change Description:

Added fields:

- Converted Invoiced Rate
- Conversion Date
- Conversion Flag

#### Previous Version:

View Name: Ski Team

Activated: 31/5/2016



You will lose all changes made in the current revision of this view - the rollback cannot be undone.

There are no active reports using this view.

Continue

Cancel

## Deleting

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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	Views
Ski Team	0	0	0
		Ok	Cancel

## Copying

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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

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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.

GeneralColumnsDataSQLElementsSecurityReportsCache

This view is not cached.  
[Create a cached copy of this view](#)

CloseSaveActivate

2. You will now have a series of options to configure. Select the name of the data store you have setup.

GeneralColumnsDataSQLElementsSecurityReportsCache

Data Cache Details

Data Store: -- Select --

Incremental Load: ☐ Yes ☒ No

Refresh Data: ☒ Manual ☐ Scheduled

SaveCancel

CloseSaveActivate

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 Cache Details

Data Store: CSV Store ⓘ

Incremental Load: ☒ Yes ☐ No

Incremental Load Key: -- Select -- ⓘ

Refresh Data:

- Select --
- Age at Camp
- Athlete Counter
- Athlete ID
- Athlete Latitude
- Athlete Longitude
- Camp Days
- Camp ID
- Camp Rating
- Campaign ID
- Cancellation Fee
- Cost of Camp
- Date of Birth
- Days Between Invoice and Camp
- End Date
- Exchange Rate
- Invoice Estimate
- Invoiced (Pref Currency)
- Invoiced Amount
- Invoiced Date

Save Cancel

Close Save Activate

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 Cache Details

Data Store: CSV Store ⓘ

Incremental Load: ☒ Yes ☐ No

Incremental Load Key: Invoiced Date ⓘ

Refresh Data: ☐ Manual ☒ Scheduled

### Refresh Schedule

Frequency: Weekly

Day: Saturday

Local Run Time: 17 : 30  
Australia/Sydney (+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.

GeneralColumnsDataSQLElementsSecurityReportsCache

×

This view is cached.

Delete

Data Store:CSV Store

Incremental Load:Yes

Incremental Load Key:

[Populate Data Now](#)

Close

Save

Activate

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

GeneralColumnsDataSQLElementsReportsCache

×

Cached View

Data for this view is refreshed manually.

Last Populated: 31/5/2016 11:34 AEST (AEST)

Populate Data Now

Rows: 20

Refresh Data

Demographic	Age at Camp	Age Group at Camp	Invoiced Amount	Cancellation Fee	Invoice Estimate	Currency Code	Cost of
Family	30	30 - 34	3826.56	0.00	6390.38	EUR	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	26921.71	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