

Creating a Data Source Connection

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Overview

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In order for Yellowfin to retrieve results to populate reports a database connection must exist. This connection record provides Yellowfin with the location, user credentials, and logon method to be used in order to access your database.

Database connections must be set up in Administration, following the steps outlined below.

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1. Start the Data Source creation process by using one of these methods:

- **Left Side Nav** - open the left side navigation panel, click on **Create**, select the **Data Source** option
- **Top Right Button** - click on the create button, select the **Data Source** option.
- **Toolbar** - click on the **Create** link in the toolbar, select the **Data Source** option.
- **Admin Console** - navigate to the **Admin Console**, open the **Data Sources** section, click on the **Add** button.

You will now see the **New Connection** lightbox.

Left Side Navigation

Teresa Pringle
Product Specialist

Create

Report

Standard Dashboard

KPI Dashboard

View

Data Source

Storyboard

Discussion

Task

Dashboards

Top Right (with Left Side Nav enabled)

Create

Report

Dashboard Tab

View

Data Source

Storyboard

Discussion

Task

Toolbar

Dashboard

Create

Browse

Administration

Discussion

+ Create

Report

Dashboard Tab

Storyboard

Discussion

View

Data Source

Task

Admin Console

Data Sources

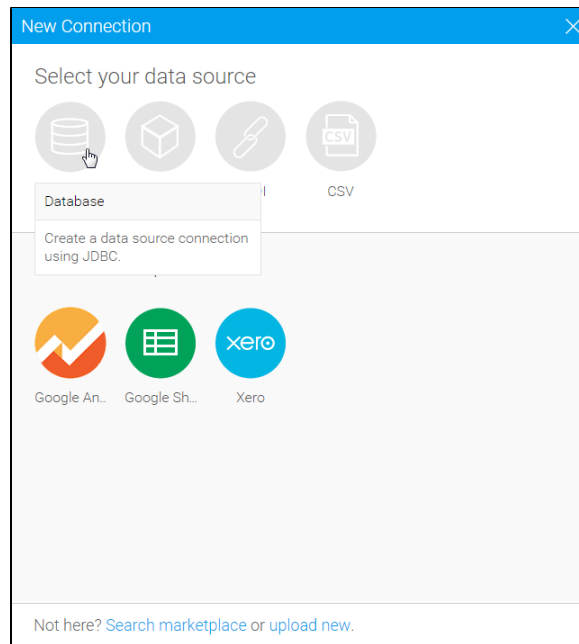
Connection	Description
CSV	CSV
Samples	
Ski Team	Ski Team is the demonstratio
SQL Server Ski Team	

2. From here you will need to either;

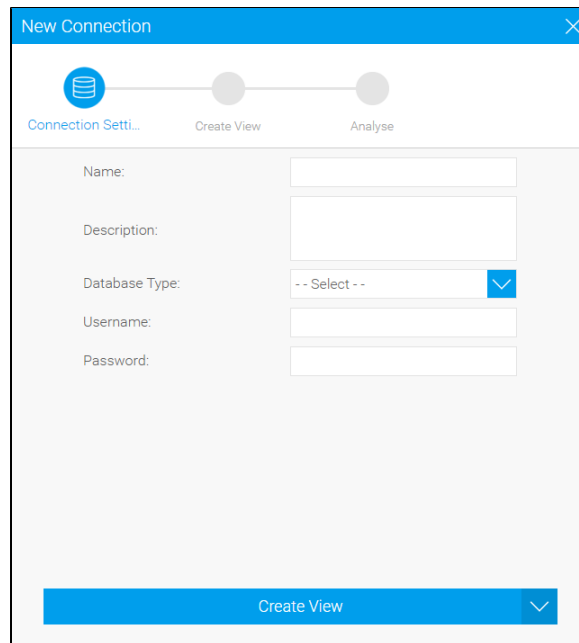
- **Select your data source,**
- **Choose a platform,**
or

- **Upload** a new connector

We're going to select a **Database** from the source type list.



3. You will now see the basic parameters required for your source connection.



4. Provide the required connection parameters.

See [Source Connection Parameters](#) for more information.

The 'New Connection' dialog box is shown with the 'Connection Settings' tab selected. It contains the following fields and options:

- Name:** Ski Team
- Description:** This is a connection to my Ski Team database.
- Database Type:** Microsoft SQL Server (dropdown)
- Include Schema in SQL:** ☒
- Database Host:** localhost
- Use Named Instance:** ☐
- Database Port:** 1433
- Database Name:** SkiTeam
- Database Authentication:** SQL Authentication (dropdown)
- SSL Required:** Disabled (dropdown)

At the bottom, there is a 'Create View' button with a dropdown arrow.

5. Once you've completed your connection information, you will have several options;

- **Advanced Connection Editor** - this will take you to the Data Source page in the Admin Console and allow you to edit all the advanced options available for your data source.
- **Test Connection** - this will allow Yellowfin to test the connection parameters you provided to ensure it can connect to your data source.
- **Create View** - this will save your connection and start you creating a view based on it.
- **Save & Close** - this will allow you to save your connection and close the New Connection lightbox, returning you to the page you were on previously.
- **Cancel** - this closes the New Connection lightbox without saving your connection, returning you to the page you were on previously.

The 'New Connection' dialog box is shown with the 'Connection Settings' tab selected. A context menu is open over the 'Create View' button, showing the following options:

- Advanced Connection Editor
- Test Connection
- Create View
- Save & Close
- Cancel

The 'Create View' button at the bottom is highlighted with a mouse cursor.

We're going to click on the **Save & Close** option.

You've now created your first Data Source connection. To view the connection simply navigate to the Admin Console and open the Data Sources list.

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For more information around the creation of Source Connections in Yellowfin see the [Data Sources](#) and [Advanced Connection Editor](#) pages of the wiki.

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