Overview

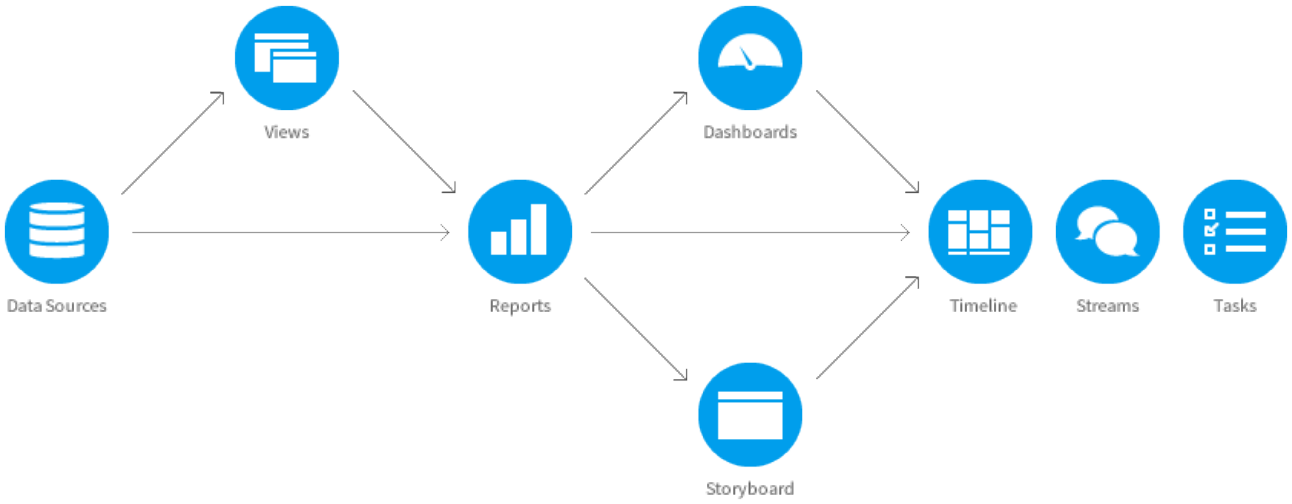
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Overview

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This section, and the tutorials contained within it, have been designed to help guide you all of Yellowfin's functionality. Depending on your technical knowledge and previous experience with tools like Yellowfin, you may sometimes find that there are terms used within this wiki that you are unfamiliar with. When this is the case, explore our Glossary, which contains a wide variety of definitions for commonly used terms and concepts.

Yellowfin Components

When first learning to use Yellowfin it's a good idea to familiarise yourself with the core components available. You will probably find that you don't personally use all the components listed below, but having a basic understanding of what they are will help you understand how everything slots together.



Component	Description

 Administration	Yellowfin's content, users, settings, and security are all managed through the Administration area.
 Data Sources	This is a connection to a database that provides all the data to make up your report. You will need to create a connection for each individual data source you wish to use for report creation. A data source may have many views, and many reports based on it.
 Views	Once you have created a data source connection you will need to create views based on it. A view is a metadata layer, between the data source and the report, which specifies the fields and logic required for users to build reports. A view may have many reports based on it.
 Reports	Once a data source connection and view have been defined a user can create a report based on them. A report is a combination of fields, formatting, and charts. A report can be used by many dashboard tabs and storyboards.
 Dashboard Tabs	Once you have written some reports you can create a dashboard tab to display them for a consumer. Dashboard tabs consist of multiple reports displayed in a way that is easy for a user to read and understand.
 Storyboards	Storyboards are a presentation within Yellowfin that allows you to combine fully functional reports with text, images, and videos.
 Timelines	Timeline is a collaborative feed that allows users to interact with each other and events that have occurred in the system.
 Streams	Discussion Streams are a collaborative feed for a particular topic and audience. Each stream is made up of posts that can contain a variety of content such as reports, dashboard tabs, storyboards, images, and screenshots.

 Users	Anyone who logs in to Yellowfin is considered a user. Each user may have different access to Yellowfin providing them with more or less functionality and content to make use of, depending on the security defined by administrators.
 Tasks	Tasks allow you to collaborate with other users by requesting and completing items to be actioned. Tasks may be related to content creation or correction, or actions to be completed outside of Yellowfin.

Tutorial Content

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There are a wide range of tutorials available, designed to guide you through the components of Yellowfin outlined above. Each of these tutorials was created using a sample training data set based on a fictional business called Ski Team. The Ski Team database and sample Yellowfin content can be included as part of the installation process by selecting the Tutorial Content option (see here for more information).

Ski Team

This fictional ski tourism business organises ski trips in various locations around the world and markets them to existing clients. The Ski Team database contains information relating to the core tourism business, including details of camps run, athletes who attended, and campaigns associated with sourcing athletes. In addition it contains financial information related to the invoicing of athletes and camp profit margins.

Core Tables

The main tables used in the Ski Team sample content are:

Table	Description
Athlete Fact	This contains information about each athlete and their participation in camps. In this database this fact table will generally have one record per person per camp attended.
Camp	This is a dimensional table which contains information about each camp. For example, the name and location of the camp. **Camp ID** is the key to this table.
Person	The person table contains information about the athlete such as name and address details. **Person ID** is the key to this table.

Introductory Tutorials

When first starting to use Yellowfin you will need to learn how to setup, login, and navigate the system. This set of tutorials is designed to get you into the system, and ready to begin building content.

1. General Installation
2. Logging In
3. Navigation
4. Content Access
5. Interacting with Reports

Content Creation Basics

Once you've logged in for the first time and explored the basics you may wish to start building content. This set of tutorials walks you through the basics of content creation from Data Source through to Discussion Stream.

1. Data Source Managing a Data Source
2. View
3. Report
4. Dashboard Tab
5. Storyboard
6. Discussion Stream

Report Basics

The material in this section will provide you with information about some of the basic functionality available in the Report Builder. Expand on the creation basic explored in the previous section.

1. Fields
2. Table Layouts
3. Aggregation
4. Advanced Functions
5. Summaries
6. Calculations
7. Sections
8. Filters

Chart Tutorials

Once you've started writing reports, you will need to learn how to add charts to enhance your report display. Explore the tutorials below to learn how to create specific visualisations.

Analytical Charts

1. Scatter Chart
2. Histogram
3. Box & Whisker
4. Trellis
5. Heat Grid
6. Tree Map

Standard Charts

1. Area Charts
2. Bar Charts
3. Column Charts
4. Combination Charts
5. Financial Charts
6. Line Charts
7. Meter Charts
8. Pie Charts

Special Purpose Charts

1. Funnel
2. Proportional Infographic
3. Comparative Infographic
4. Radar
5. Waterfall
6. Event
7. Week Density

Dashboard Tutorials

When you've created sets of reports and charts you'll need to learn how to group and display these together through the use of the dashboard. Explore the following tutorials to learn how to create and link up content through dashboard tabs.

1. Standard Tab Basics
2. Standard Tab with Analytic Links
3. Standard Tab with Linked Series Selection
4. KPI Tab

Advanced Report Concepts

Once you've explore the tutorials outlined above, you may find that you need to implement some more advanced reports in order to achieve more detailed and complex results.

Related Reports

1. Co-Display
2. Drill Through

KPI Reports

1. Spot
2. Categorical
3. Time

Sub Query Reports

1. Append
2. Union
3. Intersect
4. Minus
5. Advanced

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