Concepts & Terminologies

What is Yellowfin?

Yellowfin is an easy-to-use report writer for non-technical users, delivering drag-and-drop simplicity for formatting and data selection. With Yellowfin, you can access information from multiple data bases without special coding knowledge. This is easy because you work with data in business terms that are familiar to you without the need to understand complex technology principles.
See http://www.yellowfinbi.com/ for more information.

What is a BI Platform?

Business intelligence (BI) platforms allow organizations to build BI applications through analysis, information delivery (such as reports and dashboards) and platform integration (such as metadata management).

Here are some commonly used words that you will need to familiarize yourself with:

Data Source

This is the database Yellowfin retrieves results from. Administrators create a Source Connection in order to access the data. *See Data Sources for more information.*

Views

This is a metadata layer created by an administrator that sits between the source connection and Report Builder that defines the fields available to report writers and the join logic required to generate SQL queries.

See Preparing Data using Views for more information.

Dashboards

This is a space to display multiple reports and charts in one place, allowing for interactive features to be used across them all at once.

See our Dashboard section for more information.

Reports

This is the result of an SQL query displayed in Yellowfin. The display can take the form of a table and/or chart.
See our Reports section for more information

Charts

A visual representation of data. Yellowfin has a wide range of chart types available.
See Charts for more information

Instance

This is a single installation of Yellowfin running. Some systems may have multiple instances of Yellowfin running. In this case there is often a development instance, testing instance, and production instance. There may also be multiple instances for different production purposes, depending on requirements.

Integration

This is the process of combining Yellowfin with an existing OEM system to create a system that feels seamless to the end user.

See Integration for more information.

KPI

Key Performance Indicator. This is a figure used to monitor business performance, such as sales in dollars or units. Performance is tracked against a target and makes use of Conditional Formatting alerts.
See KPI Reports for more information.

Collaboration

This is when users work together to share insights into their data and the decision making process. Yellowfin provides features to assist the collaborative process including Comments, Discussions, and Annotations.
See Collaboration for more information.

Drill

Drill refers to the action performed by a user by clicking on a hyperlink in a report that either steps into more detail in the same report, or opens a separate detail report related to the row that was selected.
There are three forms of Drill available in Yellowfin; Drill Down, Drill Anywhere, and Drill Through.
See Dashboard Drill Analysis for more information.

Navigation

This is the way in which users move around the Yellowfin interface. There are various menus and buttons designed to move the user between pages and components of the system.
See Navigation for more information

Multi-tenacy

This is when a single instance of software runs to serve multiple clients or tenants. Yellowfin's multi-tenancy functionality is called Client Organisations.
See Client Organisations for more information.

Client Organizations

Yellowfin has functionality called Client Organisations which allows multiple virtual instances of Yellowfin to reside in the same server instance. This provides a way to create content isolated within one organisation, hidden from other organisation users logging into the same server. This is Yellowfin's Multi-Tenancy solution.
See Client Organisations for more information.

JavaScript API

This is what allows Yellowfin content to be embedded in external web pages. There is basic and advanced usage options.
End users can access the basic functionality through the Yellowfin interface by copying the generated embed javascript and pasting it in their external page.
Advanced users and administrators can access the advanced functionality by following the examples outlined here.
See JavaScript API - old for more information.

Fields

This is a column in the database that will be used to build reports. Fields can be used as Columns/Rows, Sections, and Filters. They are defined either as Metrics or Dimensions. Calculations can also be created to use as fields, these are called Calculated Fields.
See Prepare Views for more information

Metric

A standard field in Yellowfin can either be classified as a Metric or Dimension. Numeric and Date fields are classified as Metrics by default, but can be changed to Dimension if required. Metric fields have the full range of aggregations available to them. They also have different functionality available to them when used as filters. Metrics do not allow for prompts, as there are generally too many possible values available, so they have slider options available in order to allow users to easily define ranges. Metric filter values cannot be cached.
See View Builder - Field Types for more information.

Dimensions

A standard field in Yellowfin can either be classified as a Metric or Dimension. All text fields are automatically classified as Dimensions. The View Builder allows you to define numeric and date fields as Dimensions in order to be used in Drill Hierarchies, and limit the aggregations available to Count and Count Distinct.
Dimension fields retrieve the data that will provide the basis for analysis in a report. Dimensions typically retrieve character-type data (employee names, company names, etc.), or dates (years, quarters, etc.)
See View Builder - Field Types for more information.

Filter

These are fields that are being used to restrict the results returned in your report or dashboard. There are several types of filter in Yellowfin:

1. User Prompt - these filters allow the user to define the value used
2. Hard Coded - these filters have the value set at the report writing stage and cannot be changed by the report reader.
3. Source - these filters are created by an administrator and use the report reader's user details to restrict results to what's relevant to them.

See Filters for more information

Conditional Formatting

This is formatting that is triggered when a condition is met. A rule is applied to a field in the report and special formatting, such as highlighting, is applied if the data matches the rule.
Basic rules can also be applied to charts.
See Conditional Formatting for more information.

Visit the glossary to learn about more Yellowfin terminologies.