

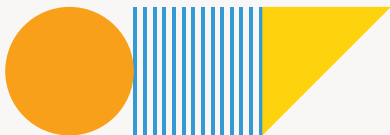


Yellowfin 9 Change Management

April 2020

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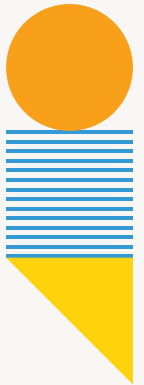
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Upgrade Management

This document is for existing users who wish to upgrade their Yellowfin instances from versions prior to 9, to the latest version 9 or higher. This document will cover the changes introduced in this version, and how they can impact users, so you can plan ahead and minimize disruption to your existing processes.

Note: ensure that you have gone through **Yellowfin 9 Release Notes** prior to reading this document, as it contains detailed information on each new product or module.



Biggest Impacts in Yellowfin 9

New Yellowfin Dashboards

Yellowfin 9 introduces a new and improved Dashboard module that has been completely re-architected to enable users to assemble creative, on brand infographic and actionable dashboards via a flexible, free-form canvas. Developer centric capability, called Code Mode, has been introduced to directly edit dashboard code and create integrated workflows. Functionality to create charts directly on the dashboard has also been included, as well as new content objects, such as Filter Widgets, Code Widgets, Action Buttons, and Blueprint.

You can learn more about the new Dashboards in the release notes, but for users upgrading to Yellowfin, here are some things to be aware of:

- **Existing dashboards** will remain unchanged, users can view and update them. There is an added advantage: users can now add sub tabs created in the dashboard canvas.
- **Draft/unpublished dashboards** will no longer appear on the dashboard page; they will need to be accessed via the Browse page. Users can still view published dashboards on the Dashboard page that they have access to.

- **Dashboard filters** have been completely changed. (See below section on [Filters](#) for more information.)
- **Report summaries** have been deprecated. While existing report summaries will still be visible, users will not be able to create new ones or edit existing ones.
Tip: Users can recreate a summarized panel on their report or dashboard canvases with more customization and flexibility.
- **KPI dashboards** have been removed. (See section on [KPI dashboards](#) below for more information.)
- **Dashboard help** messages that appeared when exploring dashboard have been deprecated.

KPI Dashboards

KPI reports and dashboards have been removed from the application. This change has the following impact:

- Existing KPI reports will exist, however the KPI summary will be gone.
- Users will not be able to create new KPI reports.
Note: Yellowfin will be introducing a KPI report widget in the future.
- If any KPI reports were set up for broadcasts, they will now appear as standard reports.
- KPI report schedule will remain unchanged.

Filters

Report and dashboard filters have had a complete makeover in Yellowfin 9. Here's how this impacts filters on your dashboards.

- Filters can now be displayed anywhere on the canvas or in the left or right side containers with filter widgets.
- Left side filters still exist in dashboards, but will need to be enabled via the [Left Filters](#) toggle in the Dashboard Properties Panel.

Tip: for all the latest information on Yellowfin Dashboards, refer to our [wiki guides](#)

Yellowfin Present replaces Storyboards

The Storyboard module has been deprecated in Yellowfin 9, being replaced by Yellowfin Present. Yellowfin Present is a fully integrated presentation module designed for data led communications. This module further enhances Yellowfin's data storytelling capabilities, as it incorporates all of the new dashboard canvas functionality into presentation slides.

Existing Storyboards

Any Storyboards existing in your application will still be available, but strictly as read-only content. You may view them, but will not be able to edit these Storyboards, or create new ones.

Advanced functionality

Present contains significantly improved functionality over Storyboard. Full dashboard canvas functionality is available in Present. This includes all of the new dashboard features, including objects, such as reports, text, images, shapes and icons, filters, Blueprint, Quick Charts, Code Widgets, Action buttons, and Code Mode. Refer to [our wiki](#) for more information on Yellowfin Present.

Content fonts

Yellowfin has updated its content font capabilities. We have removed all hard coded fonts, and the ability to make system fonts (that is, fonts installed on your Yellowfin servers) appear in font lists/drop downs. A range of popular fonts will be embedded with the installer/upgrader. Custom fonts can also be easily added via Yellowfin's plugin manager. Note that these changes could affect you if you have been using an older version of Yellowfin with a font that Yellowfin does not ship with, e.g. Arial or Courier.

If your preferred font selection is not packaged with Yellowfin, and you haven't uploaded it yet, your content will display in Yellowfin's default font, i.e. Libre Franklin. You can change the default selection through the content settings, or add a custom font yourself. See wiki tutorials on both of these [here](#).

Note: If you had previously added additional font values through SQL configuration and intend to continue to use the font for your content, then you **must** upload the font files via the plugin manager. Otherwise the font will not render properly.

The method of adding font values via SQL configurations is no longer supported, however fonts added to the Java font directory are still recognized.

Why this change?

We have made this change to:

- Allow companies to incorporate their branding directly into Yellowfin.
- Remove the process of saving a font file on a user's machine.
- Have consistency amongst fonts used in Yellowfin, instead of just sticking with multiple types of hard coded fonts.
- Give more control to the users in how they wish to customize their instances.
- Make it easy to have uniform font styles on instances of Yellowfin residing on different servers.

New Report and Chart Formatting defaults

Yellowfin 9 has Chart and Report defaults for colors, fonts, styles, padding and other types of visual formatting. These settings impact the default look and feel of your charts and reports without requiring much effort to further customize them. Whilst upgrading, users will be asked whether they'd like to apply these formatting changes or keep the previous formatting.



What do the new options mean?

There are 2 options to apply the new formatting changes.

- **Configuration level defaults:** These are color, fonts and style defaults for reports and charts. Administrators are manually able to update these via the Admin Console Content settings. (See the [Configuration defaults table](#) below for more information.)
- **Chart defaults:** These are default chart formats set up in the Chart builder. This includes settings such as chart axes, legends, sorting, padding, and other visual elements. (See the [Chart defaults table](#) below for more information.)

What happens to custom report and chart styles?

If you have any custom report and chart settings applied (at the Configuration level) to your instance, then regardless of whether you apply the new Yellowfin configuration level defaults during upgrading, none of your custom settings will be affected. However, if you do choose to apply the new defaults, then only settings that you have not already previously specified, will be changed to the new Yellowfin defaults.

What exactly are these default changes?

The impact of both of these settings are described in their respective tables below.



Configuration defaults table

All the new chart and report defaults at the Configuration level, that get applied upon upgrade are covered in the table below. When you select the “Apply new configuration defaults” checkbox, the [New default](#) column values get applied to all existing and new content, otherwise the [Old default](#) values will remain.

Configuration Setting	What does this setting do?	Old default	New default
Default Font	(New configuration setting) This is the default font to be used for all content.	Many different fonts were used, a combination of Arial, Sans serif and others	Libre Franklin
Color Picker Standard Colors	The default colors to display in the color picker, along with the chart color defaults	#FFFFFF #CCCCCC #999999 #666666 #333333 #000000	#FFFFFF #ECEDF0 #BBC0CD #A0A5B4 #717684 #333740
Chart settings			
Animated Chart Loading	Adds the ability to animate the chart as it loads	Yes	No
Active Chart Outline	Define the color to outline the current active area	#FF9900	#ECEDF0
Active Chart Fill	Define the color to fill the current active area	#FFCC00	#FFFFFF
Chart Colors - Solid	Defines the solid colors to be used for the default chart colors	#009EEC #85016B #40C1C0 #FED109 #9C6ADE #0F3A5D #9BC530D #F67789 #FF6F00 #707685 #EE2438 #333740	#009EEC #7CBB00 #FFBB00 #CC0000 #8F509D #FF5716 #999999 #3FCBE9 #A8E34C #FDD806 #3C8E8F #CDA4DE #FC5F91 #666666 #FF8132 #5AC5BD

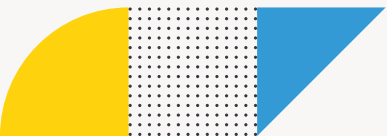


Chart settings			
Configuration Setting	What does this setting do?	Old default	New default
Chart Colors - Gradient	The gradient colors to be used to perform gradient shading when gradient is enabled	#27B9FD #B74298 #73EEEC #FFE740 #CF99FF #40648A #CFF86E #FD7788 #FFC466 #A0A5B4 #FF6364 #5D616B	#4DBBF2 #A4D04D #FFD04D #DB4D4D #B185BB #FF8A5C #B8B8B8 #79DBF0 #C2EB82 #FEE451 #77B0B1 #DCBFE8 #FD8FB2 #949494 #FFA770 #8CD7D1
Map Colors	DEFINES THE DEFAULT COLORS TO BE USED FOR MAPS	#FF270F #FFFFFF #20A0FF	#EE2438 #FFFFFF #009EEC
Annotation Range Default	Defines the default color to be used for Annotation Range highlighting on charts	#009EEC	#ECEDF0
Line Width	Defines the default thickness of lines used in charts	2	1
Chart Title Font	Font formatting for the chart title text	SansSerif	Libre Franklin
Chart Title Font Size		20pt	16pt
Chart Title Font Color		#666666	#333740
Axis Title Font	Font formatting for the chart axis title	SansSerif	Libre Franklin
Axis Title Font Size		12pt	11pt
Axis Title Font Color		#999999	#717684
Axis Label Font	Font formatting to be applied to the chart axis label	SansSerif	Libre Franklin

Chart settings			
Configuration Setting	What does this setting do?	Old default	New default
Axis Label Font Color		#666666	#333740
Legend Font	Font formatting to be applied to a chart legend	SansSerif	Libre Franklin
Legend Font Color		#666666	#717684
Label Font	Font formatting to be applied to a label on a chart	SansSerif	Libre Franklin
Label Font Color		#666666	#717684
Series Selection Font	Font to be applied to the series selection text	SansSerif	Libre Franklin
Google GIS Label Border	The color to be used for GIS maps label border	#000000	#333333
Default Gridlines	The gridlines to be shown on a chart by default	X and Y gridlines	Numeric
X and Y gridline color	The color of the gridlines	#E4E4E4	#DBDDE5
Horizontal and Vertical Axis Color	The color of the horizontal or the vertical axis	#999999	#DBDDE5

Report settings			
Configuration Setting	What does this setting do?	Old default	New default
Report Title Font	The font used for the report title	Arial	Libre Franklin
Report Description Font	The font used for the report description	Arial	Libre Franklin
Column and Row Heading Font	The font used for the heading of the table	Arial	Libre Franklin
Column and Row Heading Font Size		14	12
Column and Row Heading Font Color		Black	#333740
Column and Row Heading Font Formatting		None	Bold
Column and Row Background Color	The background color applied to the table column and row headings	#009EEC	#ECEDF0
Header Height	The height of the table headers in pixels		22
Header Padding	Define the space between the text in each header cell and the cell border in pixels	Left: 6, Right: 6, Top: 6, Bottom: 6	Left: 10, Right: 10, Top: 6, Bottom: 6
Cross tab Metric headings font	The font used for metric cross tab headings	Arial	Libre Franklin
Cross tab Metric headings font color		Black	#333740
Cross tab Metric Headings Font Formatting		None	Bold

Report settings			
Configuration Setting	What does this setting do?	Old default	New default
Cross tab Metric Headings Background	The background color to be applied to cross tab metric headings		#ECEDF0
Cross tab Metric Headings Height	The height of the table headers in pixels		22
Cross tab Metric Headings Header padding	The space between the text in each header cell and the cell border in pixels	Left: 2, Right: 2, Top: 2, Bottom: 2	Left: 6, Right: 6, Top: 2, Bottom: 2
Cross Tab Column Values Font	The font used for the cross tab column values	Arial	Libre Franklin
Cross Tab Column Values Font Color		Black	#333740
Cross tab Column Values Formatting		None	Bold
Cross Tab column values Header Height	The height of the table headers in pixels		22
Cross tab Column values Header Padding	The space between the text in each value cell and the cell border in pixels	Left: 2, Right: 2, Top: 2, Bottom: 2	Left: 6, Right: 6, Top: 2, Bottom: 2
Cross tab row values font	The font formatting to be applied to cross tab row values	Arial	Libre Franklin
Cross tab row values Font color		Black	#333740
Cross tab row values Header Height	The height of the table headers in pixels		22
Cross tab row values header padding	The space between the text in each row value cell and the cell border in pixels	Left: 2, Right: 2, Top: 2, Bottom: 2	Left: 6, Right: 6, Top: 2, Bottom: 2

Report settings			
Configuration Setting	What does this setting do?	Old default	New default
Data Font	The font formatting to be applied to table cells	Arial	Libre Franklin
Data Font Color		Black	#333740
Data Cell Height	The height of the table rows in pixels		22
Data Cell Padding	The space between the text in each cell and the cell border in pixels	Left: 4, Right: 4, Top: 5, Bottom: 5	Left: 10, Right: 10, Top: 5, Bottom: 5
Row Highlight	The highlight color displayed when the mouse pointer hovers over a row		#ECEDF0
Cell border color	The color of the cell borders for a cell	#DEE6ED	#ECEDF0
Section Title Font	The font to be applied to report section titles	Arial	Libre Franklin
Section Title Font Color		#666666	#333740
Header and Footer Font	The font formatting to be applied to the header and footer text used in report exports	Arial	Libre Franklin
Header and Footer Font Size			9
Header and Footer Font Color		Black	#717684

Chart defaults table

All the new Chart defaults that get applied upon upgrade are covered in the table below. When you select the “Apply new chart defaults” checkbox, the New default column values get applied, otherwise the Old default values are applied only to existing content. The new defaults will be applied to all new content regardless of the setting selection during upgrade.

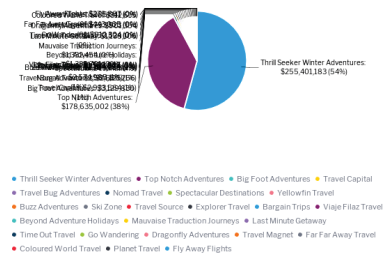
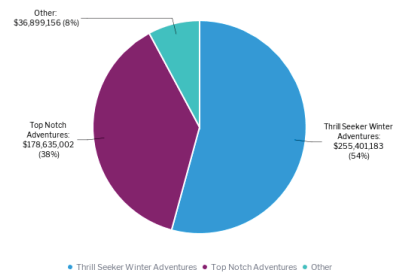
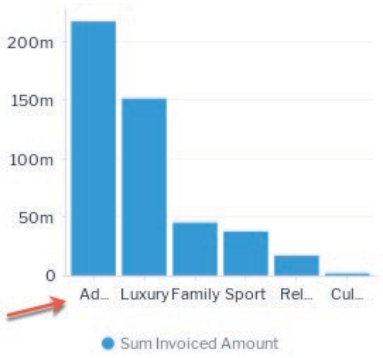
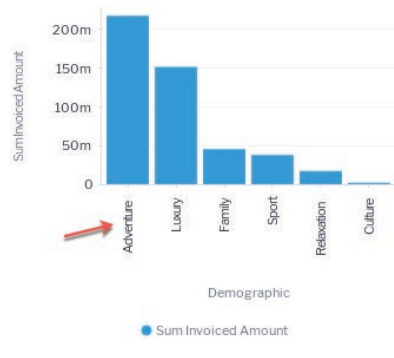




New chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Combination Overlay	Combination Overlay	Sets the display of the bars to be either stacked or side-by-side	On - Bars of different series will be overlaid on top of one another for a combination chart with a secondary axis		Off - Bars of different series will appear next to each other for a combination chart with a secondary axis	
Time Series Overlay	Time series bar and column charts	Sets the display of the bars to be either stacked or side-by-side	On - Bars of different series will be overlaid on top of one another for a time series bar or column chart		Off - Bars of different series will appear next to each other for a time series bar or column chart	
Rounded Ends	Meter and Dial	Displays rounded ends on the color bands for a Meter or Dial chart	Off		On	



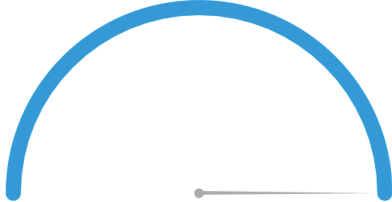



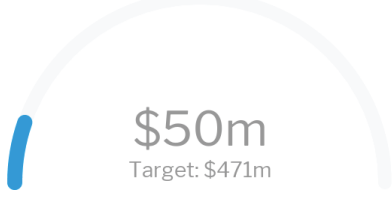
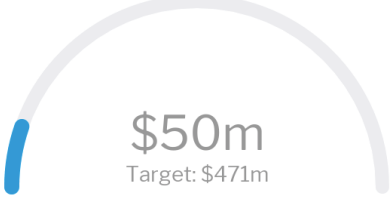
Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Opacity	Area and Stacked Area	The opacity percentage for the series. The lower the percentage, the more transparent it is	100%		Auto (new option) - Determines best fit for the opacity given the chart type	
Time Series 'Default'	Horizontal bar, Vertical Bar, Area, Stacked Area, Stacked Horizontal Bar	Turns time series on for a chart	Default - but sets time series off for these charts		Default - but sets time series on for these charts	
Label Display	Auto, scatter, pie, bar (not proportional), column, line, combination charts	Whether to display labels on a chart	Hide		Auto (new option) - Labels will be shown where there is space to show and the chart type is relevant	


Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Axis Titles	All charts with axes	Whether to display titles on an axis for a chart	None		Auto (new option) - Determines whether axis titles should be shown or hidden automatically. Axis titles will also be auto generated. Small charts hide their axis titles and shared axis to show an axis title	
Legend Position	All charts with legends	Specify the location of the legend on the chart	Bottom		Auto (new option) - Determines whether the legend should show or hide automatically. Legends will hide if there is only one series or the chart is small, and the position will go to the right if there are lots of items	
Sort and Sort by	All charts that support sorting	Controls the sorting on the chart	Data and Ascending		Auto (new option) - Sort and Sort by both have a new option 'Auto' which determines the best sort given to the chart type. The default sort is sort by series in descending order, but discrete time series will sort by date ascending	



Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Pie other segment	All pie charts	The "% of total" of a segment must be smaller than this option, in order to be grouped into an 'Other' segment	0	 <p>Thrill Seeker Winter Adventures \$255,401,183 (54%)</p> <p>Top Notch Adventures \$178,635,002 (38%)</p> <p>Other \$36,899,156 (8%)</p>	Auto (new option) - If a pie chart has more than 10 segments then the other segment is set to 5%	 <p>Thrill Seeker Winter Adventures \$255,401,183 (54%)</p> <p>Top Notch Adventures \$178,635,002 (38%)</p> <p>Other \$36,899,156 (8%)</p>
Rotate axis label	Category based non auto and non trellis charts	Specifies which angle the axis labels are displayed in relation to the axis bar. This allows you to rotate long labels to display more text	Standard	 <p>Sum Invoiced Amount</p>	Auto (new option) - rotates the labels to '90 up' when the chart gets too small	 <p>Sum Invoiced Amount</p>
Color Band width	Meter and Dial	Defines the width of the color band on a Meter and Dial chart	12		20	

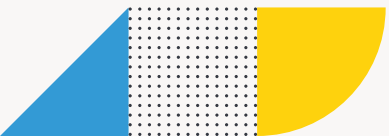


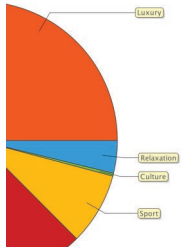
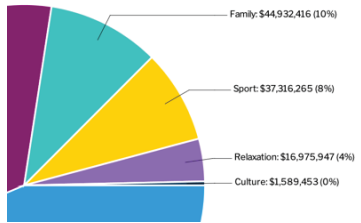
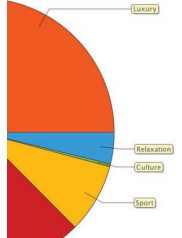
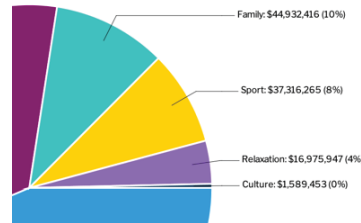
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Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Color Band Background opacity	Meter and Dial	The opacity for the color band background, as a percentage of the overall color band opacity. The lower the percentage, the more transparent it is.	40		100	
Show Needle	Meter and Dial	Whether to show or hide the needle on a Meter and Dial chart	On		Off	
Show Outline	Meter, Dial and Thermometer	Draw an outline around the edge of the meter chart's shape	On		Off	
Color band background color	Meter, Dial and Thermometer	Defines the color to be displayed behind the color band on the meter	#F9F9F9		#ECEDF0	

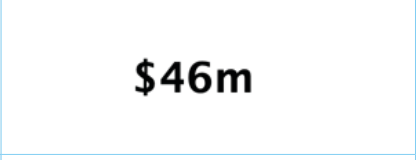
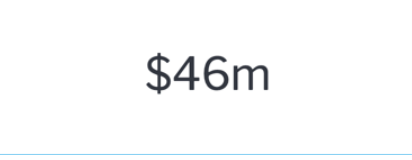
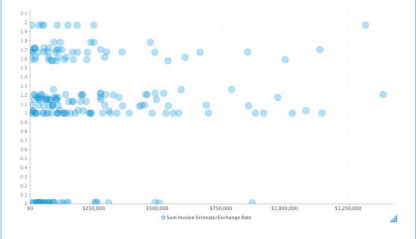
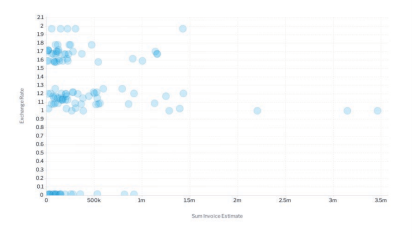
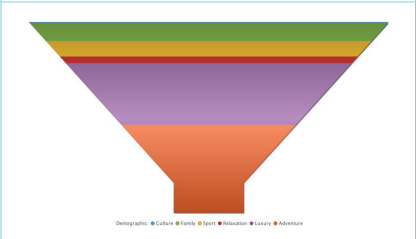
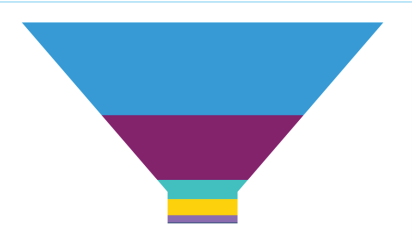
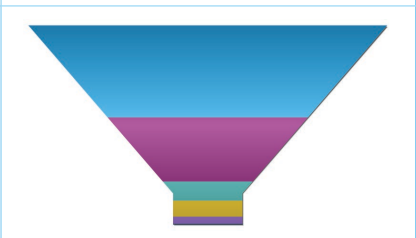
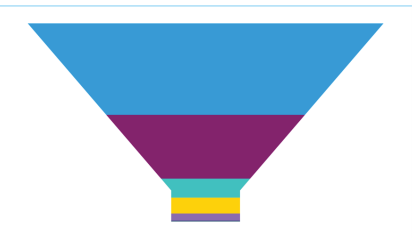
Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Show Value	Meter, Dial and Thermometer	Displays the current value of the measure on your meter chart	Off		On	
Show Target	Meter, Dial and Thermometer	Displays the current value of the target on your meter chart. If the name and/or value are shown, the target will appear last	Off		On	
Segment outline display	Ring	Displays lines between each segment of the ring chart	On		Off	
Shadow Display	Pie, 3D Pie and Ring	Displays a shadow effect behind the pie chart	On		Off	



Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Outline Color	Pie, 3D Pie and Ring	Defines the color of the outline of the pie and its segments	#444444		#FFFFFF	
Outline Width	Pie, 3D Pie and Ring	Defines the width of the outline of the pie and its segments	Thin		Medium	
Label Border	Pie, 3D Pie and Ring	Defines the border around the labels of the pie charts	Solid		None	

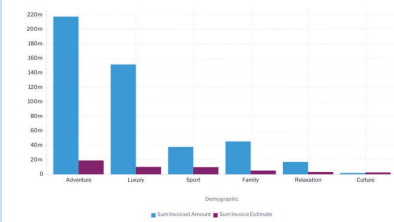
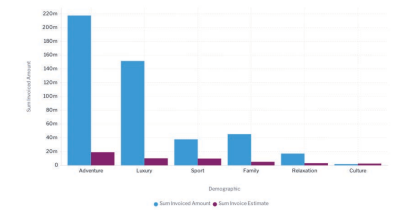
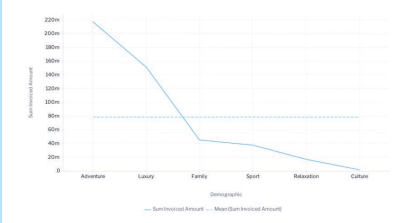
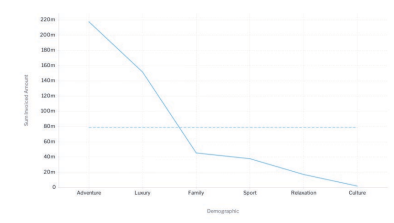
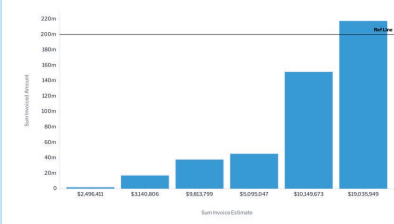
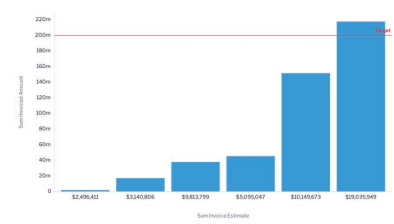
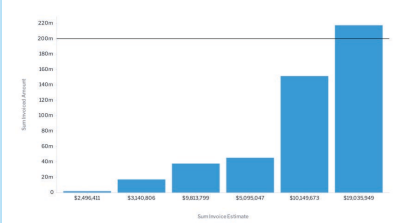
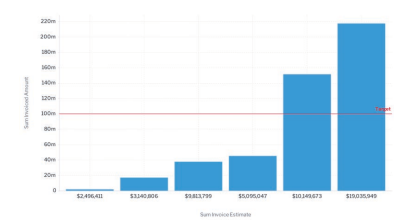


Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Label Content - Value	Pie, 3D Pie and Ring	The label for the pie chart containing the value	Off		On	
Label Content - Percentage	Pie, 3D Pie and Ring	The label for the pie chart containing the value as a percentage	Off		On	
Bold Font	Numeric Display	Whether the font for the numeric display is bold	On	\$447m	Off	\$471m
Font Color	Numeric Display	Defines the font color for the numeric display	#000000	\$46m	#333740	\$46m

Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Font Size	Numeric Display	Defines the font size for the numeric display	30		40	
Bubble Opacity	GIS Bubble Map and Scatter charts	Defines the opacity percentage for the bubbles. The lower the percentage, the more transparent they are	30		20	
Section Shading	Funnel	Displays shading on each section in the funnel chart	On		Off	
Shadow Size	Funnel	The size (pixels) of the shadow effect applied to the funnel chart	4		0	

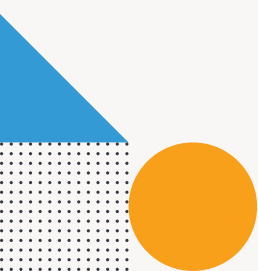
Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Axis Formatting	All charts with numeric axes	Used to automatically abbreviate numeric axis values, such as changing 100,000,000 to 100m	Off - Allows custom formatting of the numeric axis, including prefix, suffix and decimal places		On - Allows automatic abbreviation of numeric axis values	
Axis Margin	All charts with axes except for Auto and Week Density	Defines the spacing between the edges of the axis and the first and last categories	1		2	
Category Spacing	Box and whisker, all bar (except proportional bar), column and combination charts (only bar/column sub charts)	Defines the size of the spacing between each category grouping on the axis	3		2	
Series Spacing	Horizontal bar, Horizontal 3D bar, Horizontal cylinder, vertical bar, vertical bar 3d, cylinder, combination charts	Defines the size of the spacing between each series within a category grouping on the axis	1		0	



Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Legend Item Shape	All charts that have legends that aren't color ranges	Defines the shape of the items in your legend	Default (Was based on the type of the chart). Example for column bar shows square shape on legends		Circle	
Show Trends in Legend	Any chart with a trend field	Whether to show the trends in the legend	On		Off	
Reference line Color	Any chart with a reference line	The color of the reference line	Black		#EE2438	
Reference Line Text	Any chart with a reference line	The text shown above the reference line	None		The word 'Target'. There is also now a new option 'Hide Label' to allow no text to be added above the line	



Existing chart settings						
Chart Setting	Chart Type Affected	What does this setting do	Old default	Old default image	New default	New default image
Pie Chart Start Position	All pie charts	The position relative to an analogue clock face that the first segment in the pie should start	3 o'clock	<p>A pie chart with six segments. The largest segment (Adventure) is at the bottom, and the smallest (Relaxation) is at the top. The segments are: Adventure \$27,544,403 (46%), Luxury \$51,506,754 (32%), Family \$46,259,603 (30%), Sport \$37,740,858 (9%), Relaxation \$7,258,854 (4%), and Culture \$5,433,203 (2%).</p>	12 o'clock	<p>A pie chart with six segments. The largest segment (Adventure) is on the right, and the smallest (Relaxation) is at the top. The segments are: Adventure \$27,544,403 (46%), Luxury \$51,506,754 (32%), Family \$46,259,603 (30%), Sport \$37,740,858 (9%), Relaxation \$7,258,854 (4%), and Culture \$5,433,203 (2%).</p>



Formatting with other installers

This FAQ section is for users who use the silent installer or any other installers, besides the standard, and wish to apply the above chart and report formatting changes.

What options do I get in the Silent Installer?

- **migrate9Configuration** - Set this option to true if you want all the new configuration defaults to be applied to your instance.
- **migrate9ChartDefaults** - Set this option to true if you want all your charts to take the new chart default formatting.

What options do I get in the Command line installer?

The user is prompted for each option individually with a yes/no response. See image below for reference.

```

This patch updates Yellowfin to version 9.1.

Before continuing, please:
- Shut down Yellowfin.
- Backup your Yellowfin database.

Please select the directory where Yellowfin is installed.

Enter the installation directory: ~/Builds/91

Do you want to apply the new configuration level defaults? This is permanent and cannot be undone. (Y/N)? y

Do you want to apply the new chart level defaults? This is permanent and cannot be undone. (Y/N)? y

--- Installing ---

Backing up webapp ..... [OK]
Updating libraries ..... [OK]
Extracting update ..... [OK]
Extracting update ..... [OK]
Updating Yellowfin Schema ..... [OK]
Updating reference data ..... [OK]
Updating Yellowfin Schema ..... [OK]
Converting Report Content ..... [OK]
Converting Report Content ..... [OK]
Updating styles ..... [OK]
Copying files ..... [OK]
Copying files ..... [OK]

--- Yellowfin Patch Installation Complete ---

```

I have set configuration values but I'd like some of the new defaults.

Any configuration option that has been modified from its default value will not be changed. If you want to take some of the new default styling, we recommend installing a fresh build and then taking the configuration settings from that installation and applying those to your existing installation.

I want to install a fresh build and import my content, what settings will I get?

If you install a fresh installation, you will get all the default configuration settings. These can then be changed as necessary. Currently imported charts will inherit the new chart formatting.

What about my client orgs?

If you choose to apply either the new configuration formatting or the new chart formatting, then this will apply to all your client orgs as well as the primary org. There is no way to specify which orgs will receive the new configuration.

Preparing for your upgrade

Upgrade requirements can vary greatly depending on your individual environments. An upgrade may require little planning, or it could require coordination from several different parties and involve a multi-tiered, clustered enterprise environment.

Consider these best practices:

- Review the release notes and understand the impact to your users, individual environments, and the upgrade timeline you want to achieve.
 - For users upgrading from versions prior to the 8.0.4 release who use custom login or other JSP pages, ensure that you have read up on Yellowfin's framework changes. Refer [here](#) for more details.
 - Define your upgrade validation and launch plans, that is:
 - Install the latest release into a test environment:
 - While Yellowfin undertakes rigorous testing before every release, we recommend some level of regression testing done as part of your upgrade plans. Testing can include a check of:
 - Content (reports/dashboards/views/stories)
 - Connections
 - Schedules / broadcasts
 - Security (interaction with security frameworks such as AD or LDAP)
 - Interactive functions (drill, filters, sliders, etc.)
 - Styling
 - Have a group of users (business users, data analysts, administrators) spend time reviewing the release notes, changes to the interface, business workflows, collaboration, new charting, and the impact to any customization to ensure a smooth upgrade.
- From your user feedback testing, define your general user training requirements:
 - Yellowfin University user certification program is geared to help all users understand the basic workflows within Yellowfin. The basic training is free and all Yellowfin users are encouraged to expand their knowledge: <http://university.yellowfinbi.com>
 - Build your teams' Yellowfin Guru skills with Yellowfin University Certification programs.
 - Make sure that all users know where to find the latest Yellowfin resources:
 - Release notes: <https://www.yellowfinbi.com/campaign/yellowfin-9-whats-new>
 - Wiki: <https://wiki.yellowfinbi.com>
 - Yellowfin Community: <http://community.yellowfinbi.com>
 - Join the Yellowfin community and review the latest lessons learned, the latest posts related to Yellowfin 9, and help provide product feedback.
 - Sign up for weekly tips and tricks video email series: <http://learn.yellowfinbi.com>
 - Public webinar series offered monthly by the Yellowfin team: Follow @YellowfinBi on Twitter
 - Take into consideration your own custom collateral, user materials, and/or marketing items that need to be updated for your end user groups.
 - Consider holding your own user group launch webinar to help focus trainings around specific user workflows and questions.

Running the upgrade

When you have completed your internal review and beta of the latest Yellowfin software version, including taking the time to isolate potential environment, user, and system impacts, you are ready for a smooth upgrade experience. In basic terms, an upgrade involves four steps:

1. Prepare with a good backup plan:

- Back up your current Yellowfin configuration database.
- Back up any modified style sheets and image files.
- Back up any custom program files.
- Ensure Yellowfin has been shut down prior to running the upgrade application.

2. Download the latest installer:

- As a customer, you should have access to the customer portal. Simply log in to access the files needed for the upgrade.

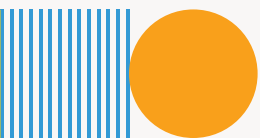
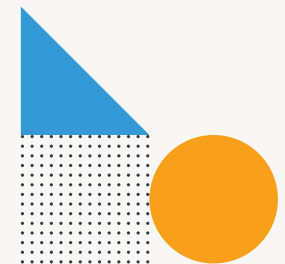
3. Run installer:

- Run the upgrade installer. The wizard will guide you through the entire process. For additional help, refer to the Yellowfin Wiki [upgrade](#) guide.

4. Test upgraded instance:

- Test the environment for content and interactivity. While Yellowfin undertakes rigorous testing before every release, we recommend some regression testing done by the customer during your validation process.
- Testing can include a check of:
 - Content (reports/dashboards/views/stories/transformation flows)
 - Connections
 - Schedules / Broadcasts
 - Security (interaction with security frameworks, such as AD or LDAP)
 - Interactive functions (drills, filters, sliders, etc.)
 - Styling

The benefits of having a consistent upgrade and user experience impact plan can be measured in many ways but the end objective is to ensure little to no impact on your user base.





Things change. Know why.

Yellowfin is a global Business Intelligence and analytics software vendor with a suite of world-class products powered by automation. Yellowfin is recognized as an innovator by the world's leading analyst firms. More than 27,000 organisations and more than three million end-users across 75 countries use Yellowfin every day. For more information, visit www.yellowfinbi.com

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