

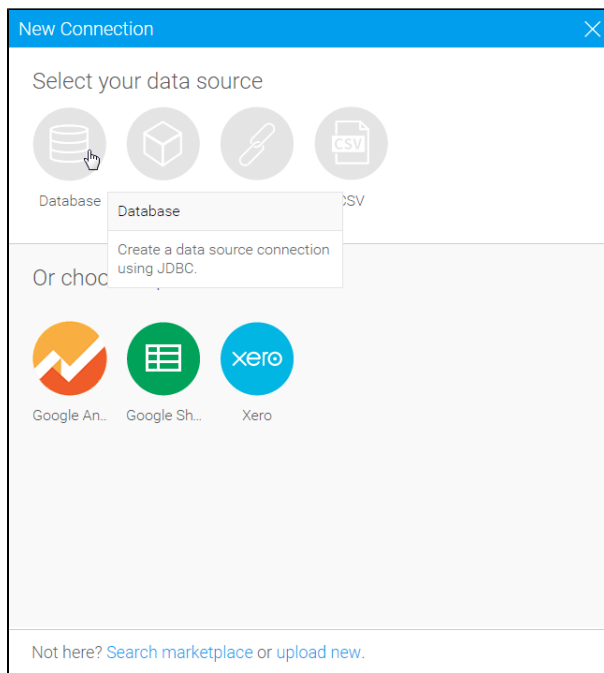
Understanding Source Connection Parameters

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Overview

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When creating a new data source connection, you will need to first specify either the type of source you wish to connect to, or provide/select a third party connector to use.



This page will be dedicated to exploring parameters available when connecting to a database.

See [Third Party Connectors](#) for or [CSV Data Imports](#) for more information on other types of connection.

New Connection Window

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When creating your new database connection, you will be presented with a basic list of details to complete.

The screenshot shows the 'New Connection' dialog box with the following fields:

- Name: [Empty text box]
- Description: [Empty text box]
- Database Type: [Dropdown menu showing "-- Select --"]
- Username: [Empty text box]
- Password: [Empty text box]

At the bottom, there is a blue button labeled "Create View" with a dropdown arrow.

This will include;

1. **Name**
2. **Description**
3. **Database Type** (from the drivers you have available)
4. **Username**
5. **Password**

Once you have selected your database type, you will be prompted to complete options specific to your connection.

Next Steps

When the basic connection details are complete you will need to choose how you wish to proceed.

The screenshot shows the 'New Connection' dialog box with the following fields and options:

- Name: Ski Team Data
- Description: Tutorial data based on the Ski Team business.
- Database Type: Microsoft SQL Server
- Include Schema in SQL:
- Database Host: localhost
- Use Named Instance:
- Database Port: 1433
- Database Name: NewSkiTe
- Database Authentication: SQL Auth
- SSL Required: Disabled

A context menu is open over the 'Database Name' field, showing the following options:

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

At the bottom, there is a blue button labeled "Create View" with a dropdown arrow.

The following options may be available;

1. **Create View** - this will allow you to continue onto the New View window. See [Creating a View](#) for more information.
2. **Advanced Connection Editor** - this will take you to the advanced options available for your connection, otherwise accessed via the Admin Console.
3. **Test Connection** - this will allow Yellowfin to test the connection information provided to ensure that the database can be reached.
4. **Save & Close** - this will allow you to save your connection and return to the page you were previously on.
5. **Cancel** - this will allow you to close the New Connection window without saving your connection.

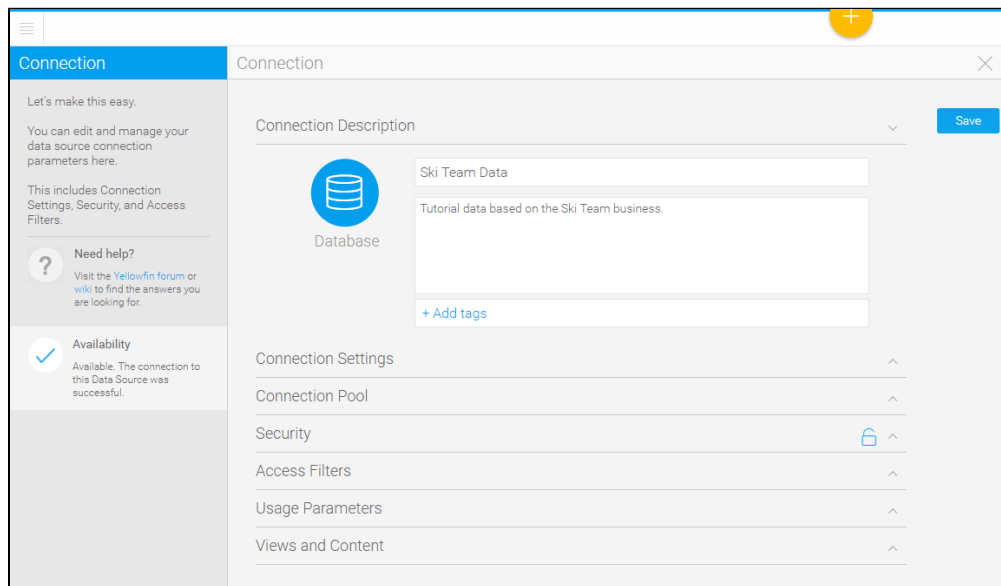
Advanced Connection Editor

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In order to edit the advanced options of a new or existing connection you will need to access its connection details through either the [Administration Console](#) or the [New Connection Window](#) options. From here you will have a range of options, split into the groups explored below.

Connection Description

This section allows you to define the basic metadata for your connection; **Name**, **Description**, and **Tags**. These items should be descriptive as users will need them in order to identify the connection when building content.



Connection Settings

These are the connection parameters that need to be defined in order for Yellowfin to know how to access your database.

You will be presented with a list of parameters that relates to the type of database you have chosen to connect to, as each database may require different options.

The screenshot shows the 'Connection' configuration window. On the left, there is a sidebar with instructions and status. The main area is titled 'Connection' and contains several sections:

- Connection Description:** A 'Save' button is visible.
- Connection Settings:**
 - Connection Method:** JDBC (dropdown)
 - Authentication Adapter:** Standard Authentication (dropdown)
 - Database Type:** Microsoft SQL Server (dropdown)
 - Include Schema in SQL:** Checked (checkbox)
 - Database Host:** localhost (text input)
 - Use Named Instance:** Unchecked (checkbox)
 - Database Port:** 1433 (text input)
 - Database Name:** NewSkiTeam (text input)
 - Database Authentication:** SQL Authentication (dropdown)

Left Sidebar:

- Let's make this easy:** You can edit and manage your data source connection parameters here. This includes Connection Settings, Security, and Access Filters.
- Need help?** Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.
- Availability:** Available. The connection to this Data Source was successful.

Connection Pool

The connection pool options allow you to specify the number of connections that can be open simultaneously, the refresh and timeout rates, and if a secondary connection pool can be used.

This screenshot shows the 'Connection Pool' section of the 'Connection' configuration window. The settings are as follows:

- Min Connections:** 1 (text input)
- Max Connections:** 5 (text input)
- Refresh Time:** 3 (text input)
- Timeout:** 180 (text input)
- Use secondary pool:** Unchecked (checkbox)

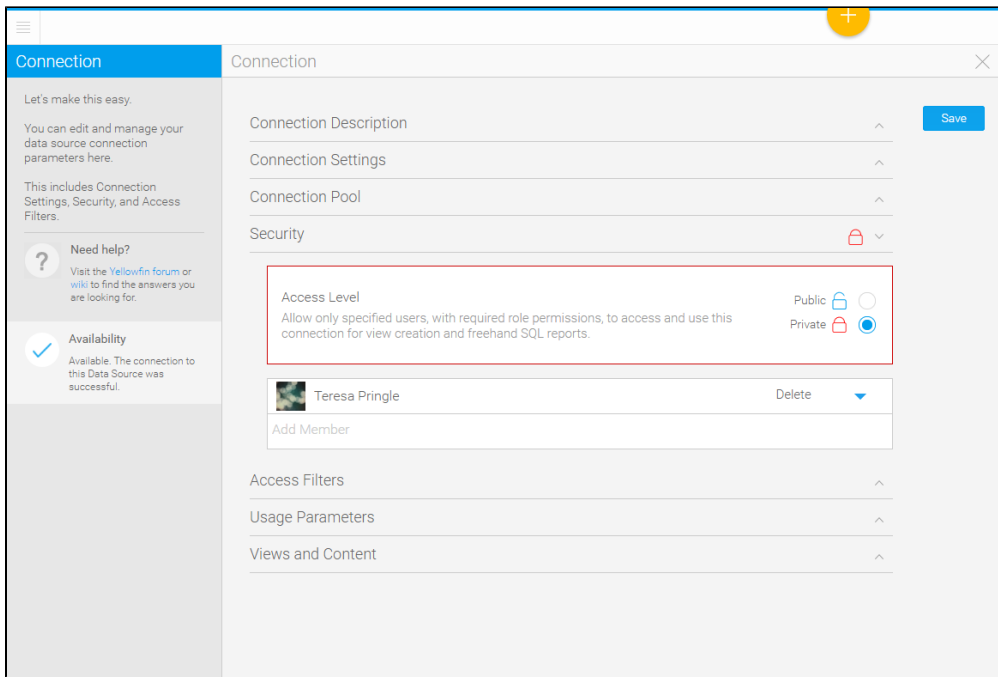
Below the 'Connection Pool' section, there are expandable sections for 'Security', 'Access Filters', 'Usage Parameters', and 'Views and Content'.

Left Sidebar:

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- Need help?** Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.
- Availability:** Available. The connection to this Data Source was successful.

Security

This section allows you to define who has access to this data source connection, and what they can do with it.



There are two main options available:

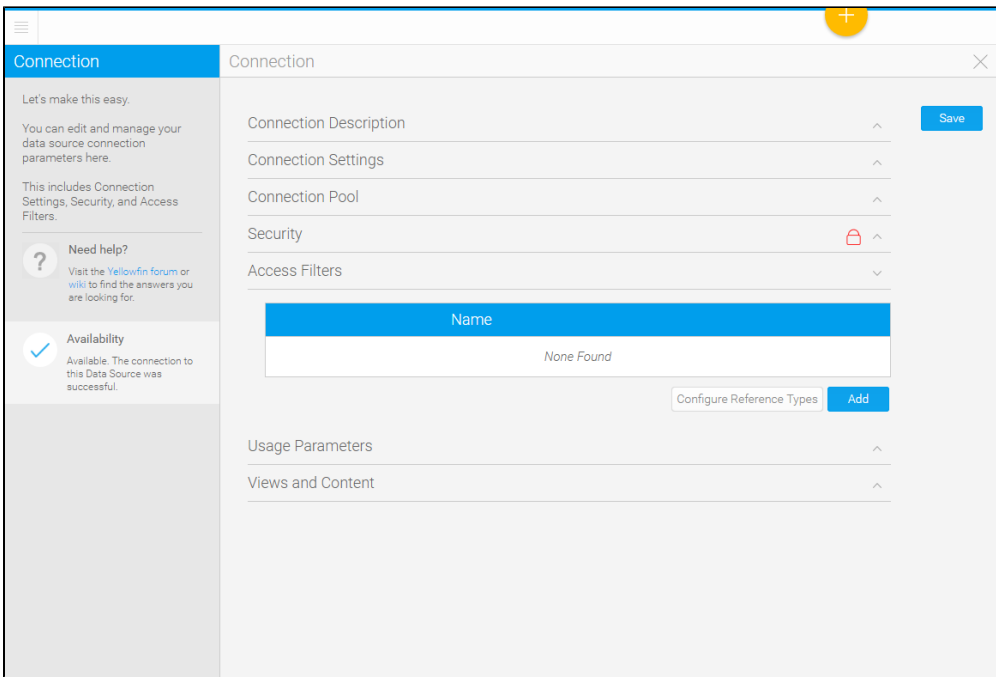
1. **Public:** allow all users with required role permissions to access and use this connection for view creation and freehand SQL reports.
2. **Private:** allow only specified users, with required role permissions, to access and use this connection for view creation and freehand SQL reports.

If you set the data source to **private** you will then need to define specific users, or groups of users, to have access to the connection. Each user can be assigned one of the following levels of access;

1. **Read:** allows users to see views based on this data source in the data sources and views page, and when creating a report.
2. **Update:** allows users to create, edit, or copy either a view or freehand SQL report based on this data source, as well as the above **Read** level of access.
3. **Delete:** allows the user to **Delete** this data source connection, as well as both of the above **Read** and **Update** levels of access.

Access Filters

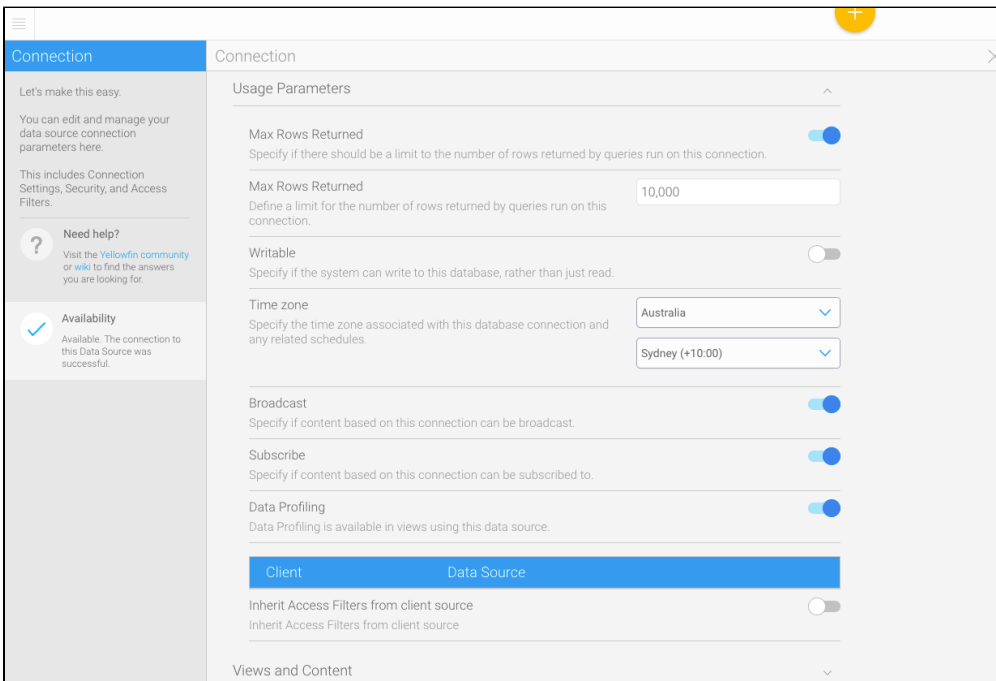
This list allows you to add new, and manage existing, access filters.



See [Restricting Data with Access Filters](#) for more information.

Usage Parameters

This section allows you to define some general settings related to the use of this data source.



Views & Content

This allows you to view a list of content that has been created based on this data source connection.

Connection

Let's make this easy.


You can edit and manage your data source connection parameters here.

This includes Connection Settings, Security, and Access Filters.

Need help?
Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.

Availability
Available. The connection to this Data Source was successful.

Connection

Security  ^

Access Filters ^


Usage Parameters ^

Views and Content v


Content Usage

Ski Team 117 Reports v


Agency Benchmark
Top N Agencies compared to all other Agencies by demographic



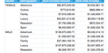
Agency Sales over Time
View agency sales by agency type over time.



Agency Sales over Time
View agency sales by agency type over time.



Athlete
An athlete KPI report used to highlight KPI dashboard tab functionality



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