

Getting Started with Views

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Learning Outcomes

After completing this section, you will be able to:

- Create a View using a data source
- Join tables
- Choose columns to be available for analysis
- Construct calculated fields and drill-down hierarchies
- Format fields

Example Use Case

For the purposes of this "Getting Started Journey", we are using an example involving a fictional sports training business called "Ski Team". Their data contains information relating to revenue from various ski camps and the athletes who have attended.


Ski Team would like to analyze their overall financial situation. They want to break down the invoiced amount by dimensions such as customer regions, demographics and gender. They are also interested in understanding which ski camps are bringing in the most revenue this year and how that compares to revenue brought in last year.

About Views

A View is a translation layer used by Yellowfin to hide the complexity of database structures from Report writers. The View is used to define which columns in your database you wish to make available for building Reports. These fields may come from multiple tables and therefore will require joins (the business logic that links rows in different tables together).

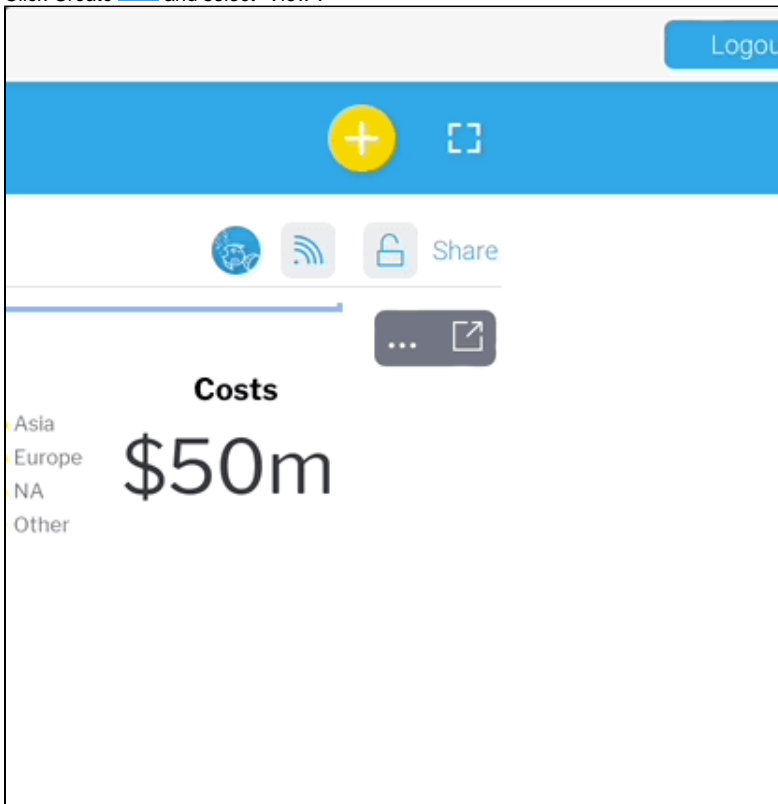
Additional Learning: See more information on [Views](#).

Before you can create Reports, Charts, or Dashboards, you need to build a View. Follow the instructions in this section to learn how to create and configure a View.

Note: If you are not already on the Browse page, please navigate there. (Burger Bun  -> Browse All)

Create a Multiple Table View

- Click **Create**  and select "View".



Note: If you don't see the Create button in the top right corner, open the Burger Bun. You'll see a yellow Create option. Open and select "View".

yellowfin						
Search Content						
Sort By						
Layout						
Columns						
My Content						
All						
Development						
Getting Started with YF						
Tutorial						
Athlete						
Camp						
WPs						
Marketing & Booking						
Training						
By Folder						
All						
Development						
Getting Started with YF						
Tutorial						
Athlete						
Camp						
WPs						
Marketing & Booking						
Training						
Name						
Description						
Last Modified						
Status						
Last Modified By						
Administration Tour						
Learn about the different areas a...						
4/5/2022 5:00 PM						
System Administrator						
Agency Benchmark						
Top 10 Agencies compared to all ...						
5/5/2022 5:20 PM						
Public Report						
System Administrator						
Agency Sales by Profitability						
An analysis of the agency sales ...						
28/2/2022 3:38 PM						
Public Report						
System Administrator						
Analysis						
This is an analytic tab that is use...						
28/5/2022 10:30 AM						
Public Dashboard						
System Administrator						
Athlete						
An athlete KPI report used to fig...						
23/1/2022 1:16 PM						
Public Report						
System Administrator						
Athlete Cost Summary						
View athlete cost summaries by ...						
26/5/2017 1:15 PM						
Public Report						
System Administrator						
Athlete Cost Summary with Region Filter						
View athlete cost summaries by ...						
1/11/2022 4:29 AM						
Public Report						
System Administrator						
Athlete Demographic Breakdown						
5/5/2022 5:53 PM						
Public Report						
System Administrator						
Athlete Demographic Breakdown with Region Filter						
15/11/2022 5:53 AM						
Public Report						
System Administrator						
Athlete Demographic Spread						
A bubble scatter that displays th...						
15/5/2022 1:45 AM						
Public Report						
System Administrator						
Athlete G5 Google Map						
26/5/2017 1:15 PM						
Public Report						
System Administrator						
Athlete G5 Map						
View inviting and camp eating & ...						
26/5/2017 1:15 PM						
Public Report						
System Administrator						
Athlete Invoice Summary						
View athlete invoicing summary...						
26/5/2017 1:15 PM						
Public Report						
System Administrator						
Athlete Invoiced G5 Heat Map						
26/5/2017 1:15 PM						
Public Report						
System Administrator						

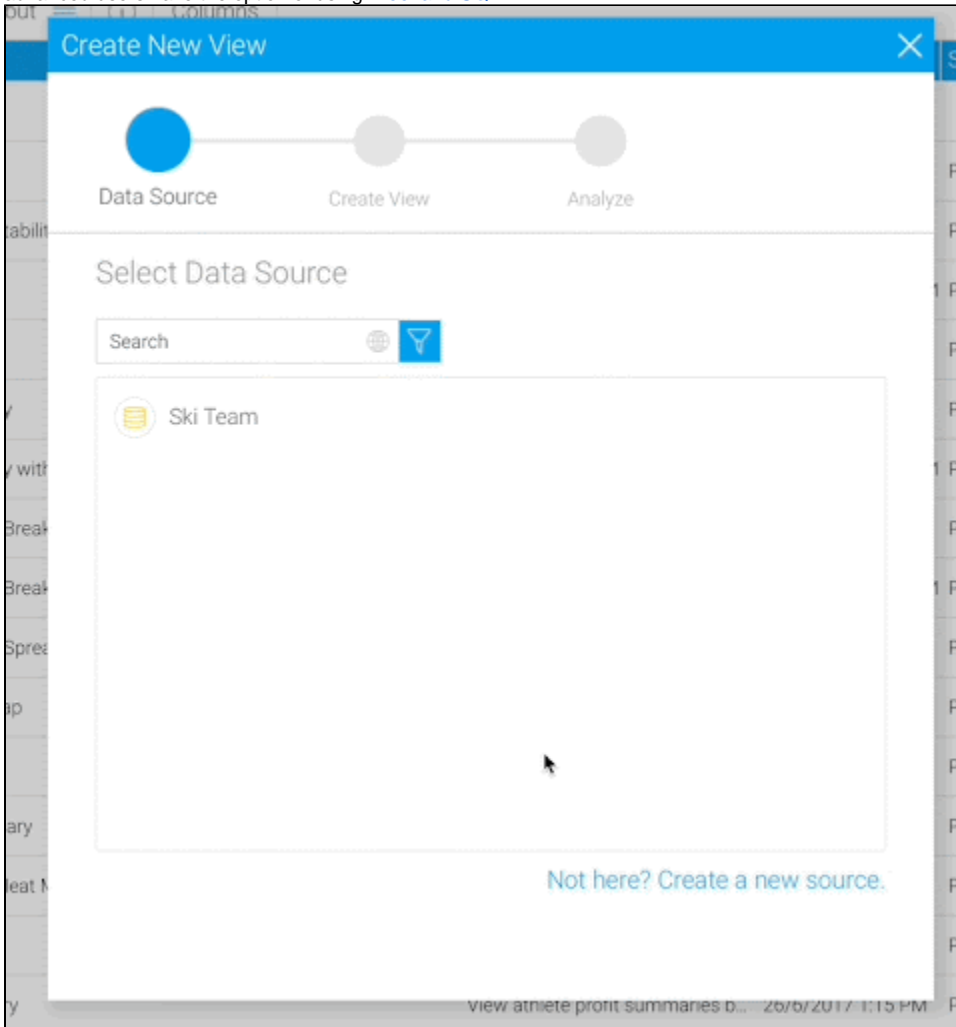
- Select "Ski Team" as your **Data Source**.

Note: For this exercise we will be using the pre-installed tutorial data source, "Ski Team". After creating Reports and Dashboards using the Ski Team data source, you'll be guided on how to connect your own data source and build content using your own data.

- Select "Multiple Tables" as your **View Type**. Select **Create View** to enter the Model step.

Additional Learning: You also have the option to create a View from a single table from your database. If the [Single Table](#) option is selected,

you will be prompted to select the desired table, and Yellowfin will skip the View Builder and take you straight to a draft Report. Additionally, advanced users have the option of using [Freehand SQL](#).



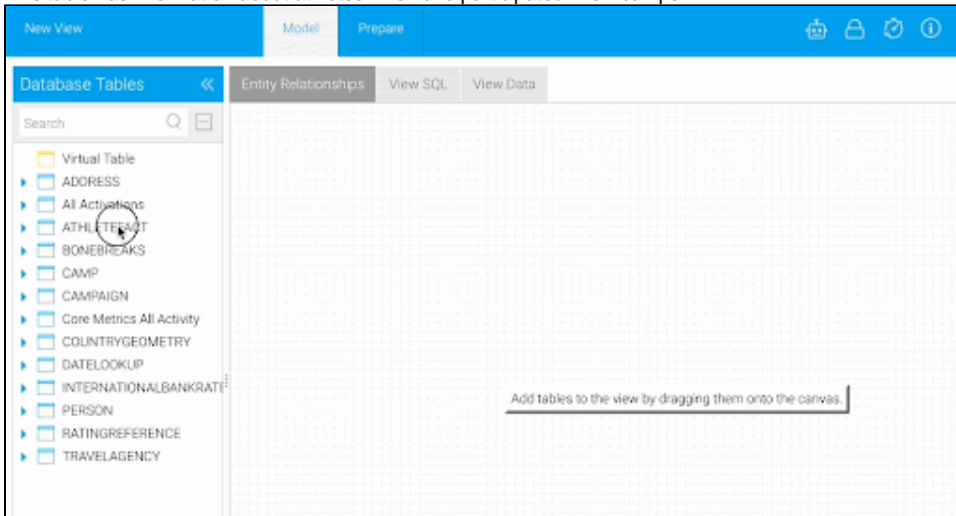
Creating the Model


In the Model step, you will drag in the desired tables onto the model canvas, join the tables, and select columns to be available for Reporting and analysis.

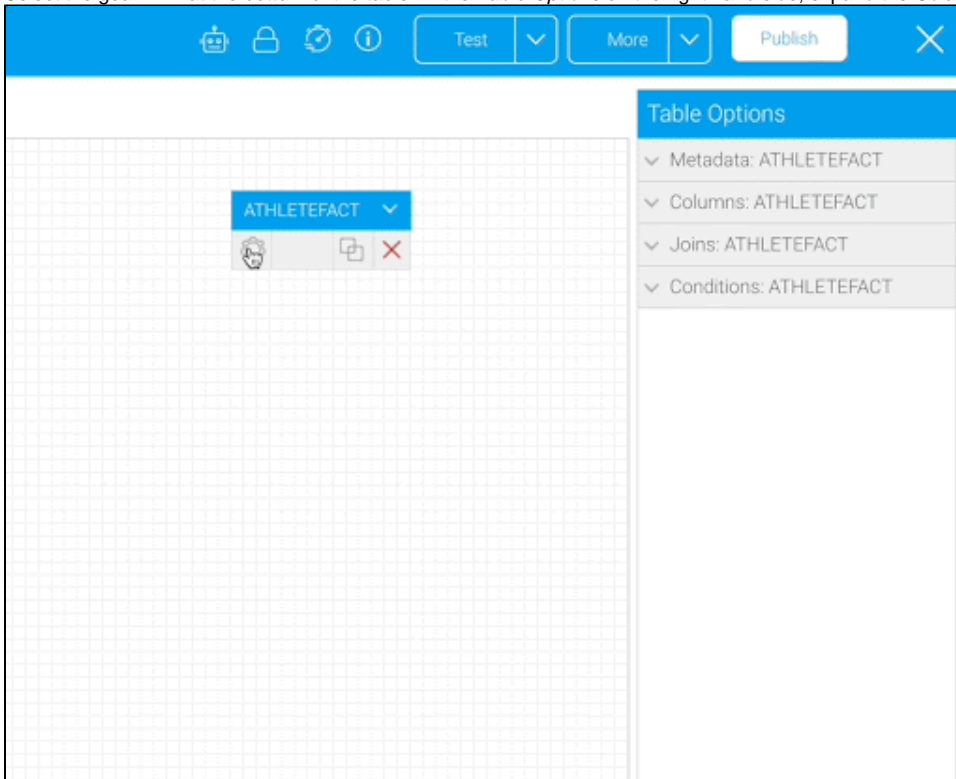
Add “ATHLETEFACT” Table

On the left, there is a list of tables from the “Ski Team” database.

- Drag in the “ATHLETEFACT” table.
This table has information about athletes who have participated in ski camps.

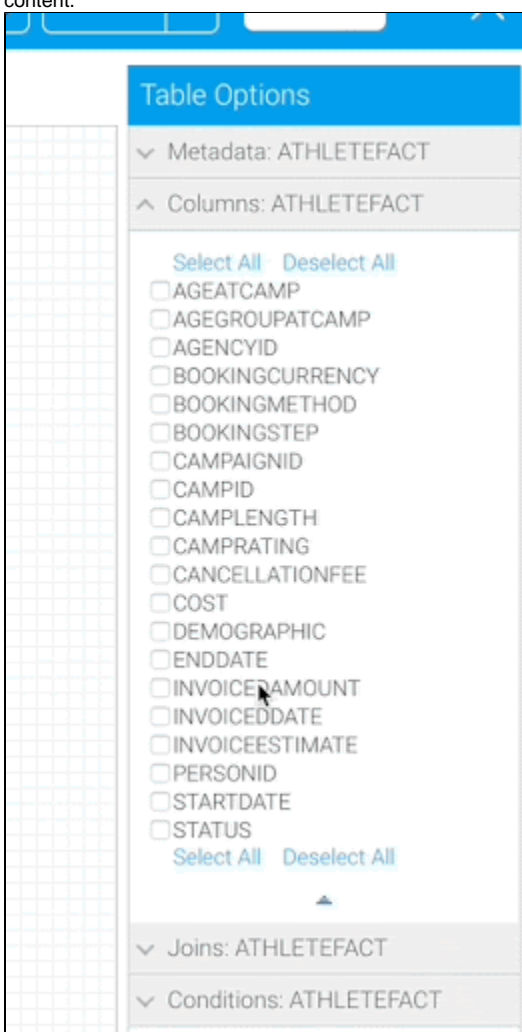


- Select the gear  at the bottom of the table. In the *Table Options* on the right hand side, expand the *Columns* section.




- Select “CAMPRATING”, “DEMOGRAPHIC”, “ENDDATE”, “INVOICEDAMOUNT”, and “STARTDATE” from the list in the *Columns* tab. Click the gear at the bottom of the table again to update the settings. The columns you selected will now appear in bold.

Note: The selected fields will be visible as your columns when creating Reports. The unselected fields will not appear or be available to build content.




Add “CAMP” Table

- Drag in the “CAMP” table.
You’ll use this table to extract information on the regions and demographics of the ski camps.
- Select the gear  on the “CAMP” table.

- Select "CAMPDEMOGRAPHIC", "CAMPDESCRIPTION", and "CAMPREGION" as your columns. Click the gear again to update the settings.

Next, join the two tables together.

Join the "ATHLETEFACT" table with the "CAMP" table

- On the "ATHLETEFACT" table, click the join  icon. This will pop up a window to set up your join.
Note: The Join From needs to be the "ATHLETEFACT" table. If your Join From is the "CAMP" table, click Delete Join, and make sure to select the join icon from the "ATHLETEFACT" table.
- Select "Inner Join" as the *Join Type*, and "One to One" as the *Cardinality*. In the *Join To* drop down menu, select "CAMP".
Additional Learning: Learn about different [join types](#).
- From the "ATHLETEFACT" table, select the "CAMPID" column to be used to join the tables together. Set the operator to "Equal to" and from the "CAMP" table, select the "CAMPID" column. Click **Add**, then click **Save & Close** at the top right corner.

You should now see your model, with the two tables joined together using an inner join.

Note: Hovering over the join icon will display the logic in a tooltip.
Repeat this process for the "DATELOOKUP" table.

Add “DATELOOKUP” table

- Drag in the “DATELOOKUP” table.
This table has one row per date. In the next steps, you will extract a few date fields of different granularities. These will be especially useful in building Time Series Charts later on.
- Select the table's gear icon.
- Select “MONTHDATE” AND “YEARDATE” as the columns. Click the gear on the “DATELOOKUP” table again to save the changes.

Table Options

Metadata: DATELOOKUP


Columns: DATELOOKUP

Select All Deselect All

- ☐ CALENDARMONTH
- ☐ CALENDARQUARTER
- ☐ CALENDARWEEK
- ☐ CALENDARYEAR
- ☐ DAYDATE
- ☐ DAYNAME
- ☐ DAYSHORTNAME
- ☐ LEAPYEAR
- ☐ MONTHDATE
- ☐ MONTHDAY
- ☐ MONTHDAYS
- ☐ MONTHNAME
- ☐ MONTHSHORTNAME
- ☐ MONTHWEEK
- ☐ NORTHSEASON
- ☐ QUARTERDATE
- ☐ SOUTHSEASON
- ☐ WEEKDATE
- ☐ WEEKDAY
- ☐ YEARDATE
- ☐ YEARDAY

Select All Deselect All

Join “ATHLETEFACT” table with “DATELOOKUP” table

- Select the join  icon on the “ATHLETEFACT” table.
- Select “Inner Join” as the *Join Type*, and “One to One” as the *Cardinality*. In the *Join To* drop down menu, select “DATELOOKUP”.
Note: Again, the Join From needs to be the “ATHLETEFACT” table.
- From the “ATHLETEFACT” table, select the “INVOICEDDATE” column to join the tables together. Set the operator to “Equal to” and from the “DATELOOKUP” table, select the “DAYDATE” column. Click **Add**, then click **Save & Close** at the top right corner.

Delete Join
Save & Close

Join From

ATHLETEFACT

Join Type

Inner Join

Cardinality

One to One

Join To

DATELOOKUP

Join Details

None Found. [Detect Joins](#)

-- Select Column --

Join Logic

QUARTERDATE

SOUTHSEASON

WEEKDATE

WEEKDAY

YEARDATE

YEARDAY

[View Data](#)

INVOICEDDATE

INVOICEESTIMA

PERSONID


STARTDATE

STATUS

[View Data](#)

Note: You can move the tables around as needed to make the diagrams easier to read as you add and join more tables.

Add “PERSON” table

- Drag in the “PERSON” table.
This table has information about the people who have participated in ski camps. Add this table to analyse information on participant gender and location.
- Select the table's gear .

- Select "GENDER", "ISOCODE", and "REGION" as the columns. Click the gear on the "PERSON" table to save the changes.

Table Options

▼ Metadata: PERSON

▲ Columns: PERSON

Select All Deselect All

☐ ADDRESSID

☐ DATEOFBIRTH

☐ FIRSTNAME

☐ GENDER

☐ ISOCODE

☐ LASTNAME

☐ PERSONID

☐ PERSONTYPE

☐ REGION


Select All Deselect All

▼ Joins: PERSON

▼ Conditions: PERSON

Note: Both the "ISOCODE" and "REGION" indicate a person's location, just at different granular levels. You will map the iso codes to a list of countries later on.

Join "ATHLETEFACT" table with "PERSON" table

- Select the join  icon on the "ATHLETEFACT" table.
- Select "Inner Join" as the *Join Type*, and "One to One" as the *Cardinality*. In the *Join To* drop down menu, select "PERSON".
- From the "ATHLETEFACT" table, select the "PERSONID" column to join the tables together. Set the operator to "Equal to" and from the "PERSON" table, and select the "PERSONID" column. Click **Add**, then click **Save & Close** at the top right corner.

The screenshot shows a software interface for constructing a database view. At the top right, there are buttons for "Delete Join" and "Save & Close". The main configuration area includes:

- Join From:** A dropdown menu currently showing "ATHLETEFACT".
- Join Type:** A dropdown menu showing "Inner Join".
- Cardinality:** A dropdown menu showing "One to One".
- Join To:** A dropdown menu showing "PERSON".

Below these settings are two sections:

- Join Details:** A blue header bar. Below it, the text "None Found. Detect Joins" is displayed. There is a dropdown menu showing "-- Select Column --".
- Join Logic:** A blue header bar.

At the bottom of the interface, there are two panels showing a list of available columns for selection:

- Left Panel:** Contains columns: QUARTERDATE, SOUTHSEASON, WEEKDATE, WEEKDAY, YEARDATE, YEARDAY, and a "View Data" link.
- Right Panel:** Contains columns: INVOICEDDATE, INVOICEESTIMATE, PERSONID, STARTDATE, STATUS, and a "View Data" link.

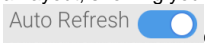
Each column list has a settings gear icon, a copy icon, and a close 'X' icon at the bottom.

You've now completed the Model stage of the View construction. You've joined the selected database tables together and chosen which columns will be available for analysis.

Continue on to learn how to edit the format of columns, create hierarchies, and make further adjustments to prepare the View for use.

Preparing the View

- Click on the *Prepare* section. Your View will change to a tabular layout, showing you a preview of your data.

Note: The Auto Refresh option  can be toggled off. This can be useful when making changes to multiple columns on databases with large data volumes.

Formatting Basic Fields

In this section, you will edit the formatting of multiple columns to make the data more readable and contextually appropriate. For example, you will be making changes such as adding currency prefixes to monetary values, adjusting the number of decimal places, and defining the default aggregations of metrics.

Invoiced Amount

- Open the "Metrics" folder on the left hand side.
- Right click on the "INVOICEDAMOUNT" column.

- Select "Edit Format" from the dropdown menu.

New View		Model	Prepare	
New View		Metrics		
Search		INVOICE...	CAMPRA...	CAMPDE
<div>Metrics</div> <div>Dimensions</div> <div>Time</div>	1	4,027.96	4.00	Family
	2	37,182.34	0.00	Luxury
	3	8,161.89	0.00	Adventure
	4	24,867.60	0.00	Luxury
	5	4,105.44	0.00	Culture
	6	11,445.60	5.00	Sport
	7	12,092.57	9.00	Adventure
	8	9,310.99	9.00	Sport
	9	3,772.33	3.00	Culture
	10	17,641.50	5.00	Adventure
	11	5,392.00	5.00	Relaxation
	12	5,408.55	4.00	Culture
	13	8,014.56	6.00	Sport

Note: You can also click on the arrow in the column header to get to the "Edit Format" page. Currently, the field names are the same as the column names in the database. Rename and format them to make them more readable.

Note: Although this isn't edited in this demonstration, you can also add a description to the fields in the Format section. These can be utilized for usability purposes, especially for self-service Reporting.

- Open the *Details* section and change the *Display Name* of "INVOICEDAMOUNT" to "Invoiced Amount". This title will appear as the column's name when you are building or viewing Reports using this field.
- Note:** You can also double-click on the field to change the field name.
- Move to the *Format* section and change the *Decimal Places* to "0".

- Add a *Prefix* indicating currency. In this example, we use "\$".

The screenshot shows the 'Field Settings' dialog for the field 'INVOICEDAMOUNT'. The left sidebar has a 'Metrics' section with 'INVOICEDAMOUNT' selected. The main panel shows the 'Format' tab with the following settings: Format is 'Numeric', Decimal Places is '2', Prefix is empty, Suffix is empty, Rounding is 'Round Half Up', and Thousand Separator is enabled. The 'Details' tab is also visible at the top of the main panel.

Camp Rating

Next, click on "CAMPRATING".

- Open the *Details* tab and change the *Display Name* of "CAMPRATING" to "Camp Rating".
The metric's default aggregation is automatically set to "Sum". In the case of camp ratings on a scale of 1 to 10, a sum aggregation would not make much sense. To better understand how users are rating the camps, analyze the average of the camp ratings.
- Change the *Default Aggregation* to "Average".

The screenshot shows the 'Field Settings' dialog for the field 'CAMPRATING'. The left sidebar has a 'Metrics' section with 'CAMPRATING' selected. The main panel shows the 'Details' tab with the following settings: Display Name is 'Camp Rating', Aggregation is 'Average', Format is 'Numeric', Decimal Places is '0', Prefix is '\$', Suffix is empty, Rounding is 'Round Half Up', and Thousand Separator is enabled. The 'Format' tab is also visible at the top of the main panel.

For the following five fields, you will just be changing the titles of the columns to title case for readability. There is no need to make any additional adjustments to these fields.

Camp Region

- Change the *Display Name* of "CAMPREGION" to "Camp Region".

Camp Demographic

- Change the *Display Name* of "CAMPDEMOGRAPHIC" to "Camp Demographic".

Start Date

- Change the *Display Name* of “STARTDATE” to “Start Date”.

End Date

- Change the *Display Name* of “ENDDATE” to “End Date”.

Camp Name

- Change the *Display Name* of “CAMPDESCRIPTION” to “Camp Name”.

Note: See more information on [field settings](#).

Reference Codes

Reference Codes allow for more meaningful values in Reports with numeric- and text-based data by mapping a code to a descriptive value. For example, a text field that contains 'Y' or 'N' could be mapped to display 'Yes' or 'No'.

Create your own Reference Code to map to the “Gender” field.

Gender

- Change the *Display Name* of “GENDER” to “Gender”.
- Change the *Format* to “Reference Code”.
- Select “Create New”.
- Name the *Reference Code* “Gender” and move to the *Values* tab.
- Click *Populate from data source* and change the descriptions to “Male” and “Female”. Click *Save*.

The screenshot shows the 'Field Settings' interface for the 'GENDER' field. On the left, a sidebar lists various fields: GENDER (selected), REGION, ISOCODE, DEMOGRAPHIC, CAMPREGION, and CAMPDEMOGRAPHIC. The main panel, titled 'Field Settings - GENDER', contains several sections: 'Details' (collapsed), 'Format' (expanded, showing 'Text' as the selected format), 'Filter Value Case' (set to '---N/A---'), and 'Access' (collapsed). The 'Format' section includes a description: 'Display the value as plain text.' The 'Filter Value Case' section includes a description: 'Specify the case a filter value should be displayed as. This will convert user prompt values if they are entered in an incorrect case.'

For the “Demographic” field, you will use an already existing Reference Code instead of creating your own.

Demographic

- Change the *Display Name* of “DEMOGRAPHIC” to “Demographic”.
 - Change the *Format* to “Reference Code”.
 - Select “Demographic” as the *Reference Type*.
- Note:** This Reference Code has a custom sort order, custom colors, and custom images. When building a Report using the “Demographic” field,

the data is sorted by this custom order. The custom colors and images can be utilized in Charts and filters to ensure values are easily identified and consistent across Reports.

Field Settings - DEMOGRAPHIC

Details

Display Name
Provide a display name for the field, to be used in the report builder. DEMOGRAPHIC

Table Name
This is the name of the source table that the view field comes from. ATHLETEFACT

Column Name
This is the name of the source column that the view field is based on. DEMOGRAPHIC

Description
Provide a description for the column to aid report writers understanding of its purpose and contents. DEMOGRAPHIC

Data Type
This is the type of data contained within the source column. Varchar

Field Type
This is the type of field, defined by Yellowfin, which specifies how the field can be used. Dimension

Country

- Change the *Display Name* of "ISOCODE" to "Country".
- Change the *Format* to "Reference Code".
- Select "Country" as the *Reference Type*.

Field Settings - ISOCODE

Details

Format

Format
Display the value as plain text. Text

Filter Value Case
Specify the case a filter value should be displayed as. This will convert user prompt values if they are entered in an incorrect case. -- N/A --

Access

Note: In addition to the View Builder, you can also create or edit Reference Codes in the Admin Console or the Report Builder.

Note: See additional information on [Reference Codes](#).

Create a Drill Down Hierarchy

Drill Down Hierarchies allow users to drill down within a dimensional hierarchy by limiting the result set as they move from one level to the next. For example, drill from Year (2022) to Month (August), and so on.

When creating a Drill Down Hierarchy, you need to start from the top level and work your way down. In this example, you'll create a drill from "Region" to "Country", so you will start with the "Region" field at the top.

Note: You can create a Drill Down Hierarchy with more than two fields. In this case, if there was a "City" field, you could drill further from "Region" to "Country" to "City".

Region to Country

- Change the *Display Name* of “REGION” to “Region”.
- Close out of the *Field Settings* window.
- Right click on the “Region” field. Hover on *Drill To* in the dropdown menu. Select “Country”.

New View		Model	Prepare			
New View		Metrics				
Search		Camp Ra...	Invoiced ...	Gender	Region	C
<div>Metrics</div> <ul style="list-style-type: none">Camp RatingInvoiced Amount <div>Dimensions</div> <ul style="list-style-type: none">GenderRegionCountryDemographicCamp NameCamp DemographicCamp Region <div>Time</div>	1	4.00	\$4,028	Male	North America	Can
	2	0.00	\$37,182	Male	Asia	Kor
	3	0.00	\$8,162	Male	Europe	Ger
	4	0.00	\$24,868	Female	Asia	Jap
	5	0.00	\$4,105	Male	Europe	Italy
	6	5.00	\$11,446	Female	Europe	Italy
	7	9.00	\$12,093	Male	Europe	Italy
	8	9.00	\$9,311	Male	North America	USA
	9	3.00	\$3,772	Male	North America	USA
	10	5.00	\$17,642	Male	Europe	Italy
	11	5.00	\$5,392	Female	North America	Can
	12	4.00	\$5,409	Male	Europe	Aus
	13	6.00	\$8,015	Male	North America	Can

The two fields will now show that they're joined in a hierarchy with a gray line.

Note: See [drill down examples](#) and [how to remove links within a hierarchy](#).

Note: You can create date hierarchies based on a single date field in your data source. They are ideal for use with time series charts, as they use granularity to dictate day/week/month/year. See more information on [date hierarchies](#).

Change the Date Format

For *Date* Field Types, you can specify the format to be applied. This will not alter the raw data, just change the way it is displayed.

In this case, you want to show the month and year of the date, with one row per month per year.

Month, Year

- Change the *Display Name* of “MONTHDATE” to “Month, Year”.
 - The *Format* should be set to “Date”.
 - Select “Other” as the *Date Format*.
- This way, you'll be able to build your own custom date format.

- Enter “MMM, yy” as the *Custom Date Format*.

Field Settings - MONTHDATE

Details

Format

Format
Display the value as a date. Date

Date Format
Select the format to be applied to the date values. dd/MM/yyyy (24...

Chart Granularity
Select the default granularity of the dates in this field to be displayed in time series charts. Metrics will be aggregated to this granularity. Day

Filter Value Case
Specify the case a filter value should be displayed as. This will convert user prompt values if they are entered in an incorrect case. --- N/A ---

Access

Now the date “01/02/2023” will display as “Feb, 23”.

Year

For the “Year” column, use the *Date Part Formatter* that allows us to display part of the date, e.g. Month Name, rather than the full date.

- Change the *Display Name* of “YEARDATE” to “Year”.
- Switch the *Format* to “Date Part Formatter”. Select “Year” as the format.

Field Settings - YEARDATE

Details

Format

Format
Display the value as a date. Date

Date Format
Select the format to be applied to the date values. dd/MM/yyyy (02...

Chart Granularity
Select the default granularity of the dates in this field to be displayed in time series charts. Metrics will be aggregated to this granularity. Day

Filter Value Case
Specify the case a filter value should be displayed as. This will convert user prompt values if they are entered in an incorrect case. --- N/A ---

Access


Note: See more information on [date formatting](#).

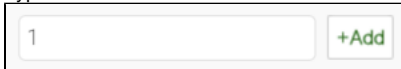
Create Calculated Fields

Calculated fields let you create new fields based on existing fields. You can use simple calculations, pre-defined functions, or freehand SQL, depending on the complexity of the calculation. When created in the View, they will appear as a pre-existing column, saving the user from having to recreate the field in multiple Reports. Calculated fields can also be useful when used in conjunction with [Guided NLQ](#), providing pre-calculated fields for your users to include in their queries.

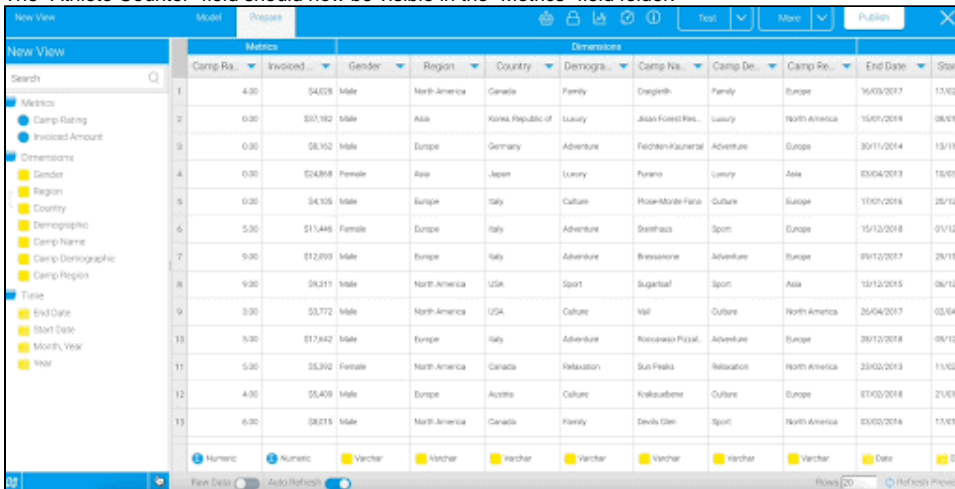
Athlete Counter

First, create an "Athlete Counter" to easily aggregate the number of athletes by camp or region. For example, when building a Report with the "Region" and "Athlete Counter" fields, the Report should show the number of athletes from each region.

- Select the  icon under the list of fields.
- Select "Calculated Field".
- Enter "Athlete Counter" as the *Calculated Field Name*.
- Place it in the "Metrics" folder.
- Type "1" in the text box and select "+Add".

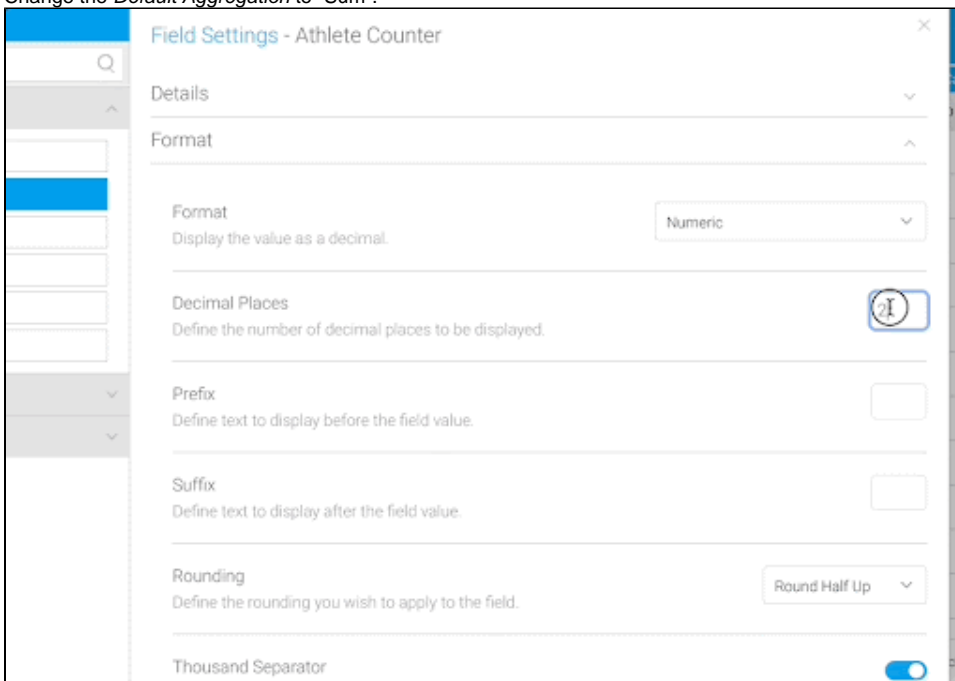


- Select Save and close the window to save your calculated field.
The "Athlete Counter" field should now be visible in the "Metrics" field folder.



	Camp No.	Invoice	Gender	Region	Country	Demographic	Camp Name	Camp Description	Camp Region	End Date	Start Date
1	430	\$4528	Male	North America	Canada	Family	English	Family	Europe	16/03/2017	15/03/2017
2	630	\$57362	Male	Asia	Korea, Republic of	Luxury	Asian Forest Res.	Luxury	North America	15/05/2016	08/01/2016
3	630	\$8362	Male	Europe	Germany	Adventure	FeichtenKauental	Adventure	Europe	30/11/2014	13/11/2014
4	630	\$24868	Female	Asia	Japan	Luxury	Purano	Luxury	Asia	03/04/2013	18/03/2013
5	630	\$4105	Male	Europe	Italy	Culture	RosenMader Park	Culture	Europe	11/05/2016	25/12/2015
6	530	\$11446	Female	Europe	Italy	Adventure	Steinhaus	Sport	Europe	15/12/2016	01/12/2016
7	930	\$12899	Male	Europe	Italy	Adventure	Bressanone	Adventure	Europe	09/12/2017	26/11/2017
8	930	\$8311	Male	North America	USA	Sport	Sugarloaf	Sport	Asia	13/12/2015	06/12/2015
9	330	\$3772	Male	North America	USA	Culture	Vall	Culture	North America	26/04/2017	03/04/2017
10	530	\$17642	Male	Europe	Italy	Adventure	Rocconaso Pizal	Adventure	Europe	26/12/2016	09/12/2016
11	530	\$5392	Female	North America	Canada	Relaxation	Sun Peaks	Relaxation	North America	23/02/2013	11/02/2013
12	430	\$5409	Male	Europe	Austria	Culture	Kraibitzberg	Culture	Europe	01/03/2016	21/01/2016
13	630	\$8015	Male	North America	Canada	Family	Devils Glen	Sport	North America	05/02/2016	11/01/2016

- Right click on the "Athlete Counter" column.
- Select "Edit Format" from the dropdown menu.
- Change the *Decimal Places* from "2" to "0".
- Change the *Default Aggregation* to "Sum".



Field Settings - Athlete Counter

Details

Format

Format: Numeric

Display the value as a decimal.

Decimal Places: 0

Define the number of decimal places to be displayed.

Prefix:

Define text to display before the field value.

Suffix:

Define text to display after the field value.

Rounding: Round Half Up

Define the rounding you wish to apply to the field.


Thousand Separator:

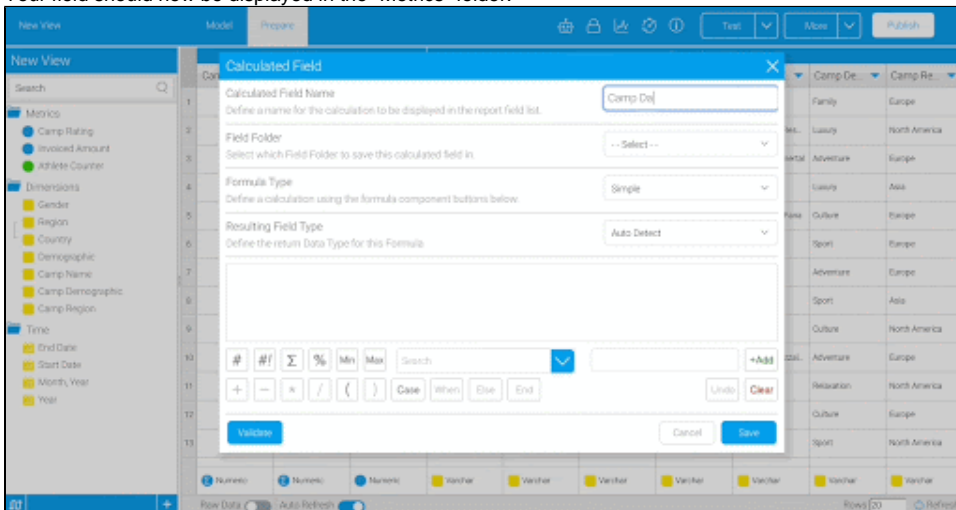
- Close the *Field Settings* window.

Camp Days

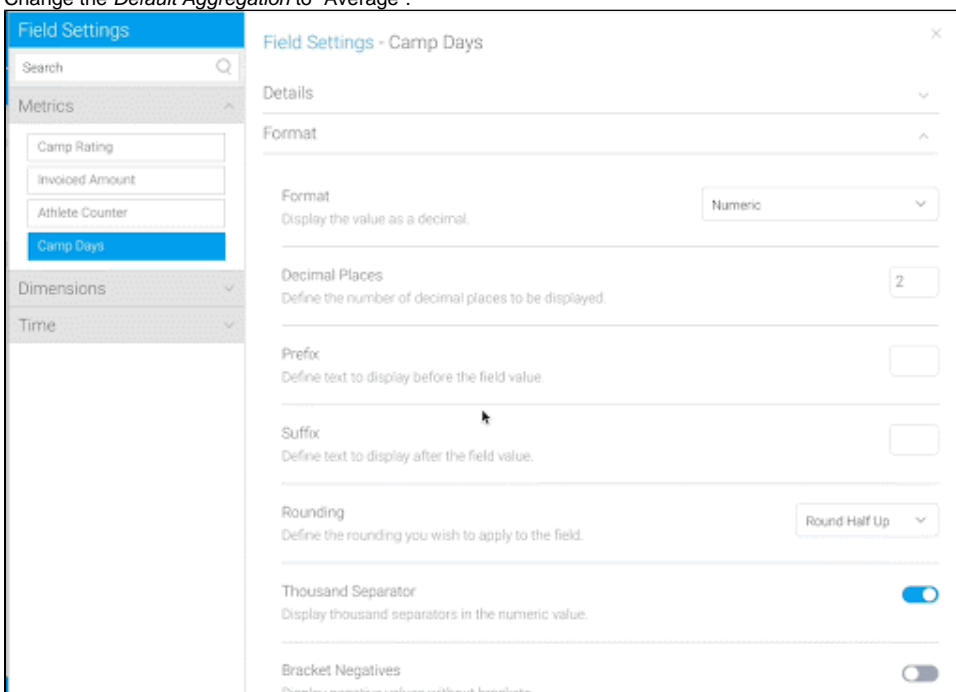
In addition, create a field to understand how many days the athletes participate in the camps, on average. You will use a Calculated Field to find the number of days between the Start and End date of an athlete's time at a specific camp.

To do this, create a Pre-Defined calculated field using Yellowfin's built-in functions.

- Select the  icon under the list of fields. Choose "Calculated Field" from the drop down menu.
 - Enter "Camp Days" as the *Calculated Field Name*.
 - Place it in the "Metrics" folder.
 - Select the "Pre-Defined" *Formula Type*.
 - Select the "Days Between, HSQL" *Function*.
 - Change the *Resulting Field Type* to "Metric".
 - Select the fields "Start Date" and "End Date" for the "Start Date" and "End Date".
 - Select Save and close the window to save your calculated field.
- Your field should now be displayed in the "Metrics" folder.




- Right click on the "Camp Days" column.
- Select "Edit Format" from the dropdown menu.
- Change the *Decimal Places* from "2" to "0".
- Change the *Default Aggregation* to "Average".

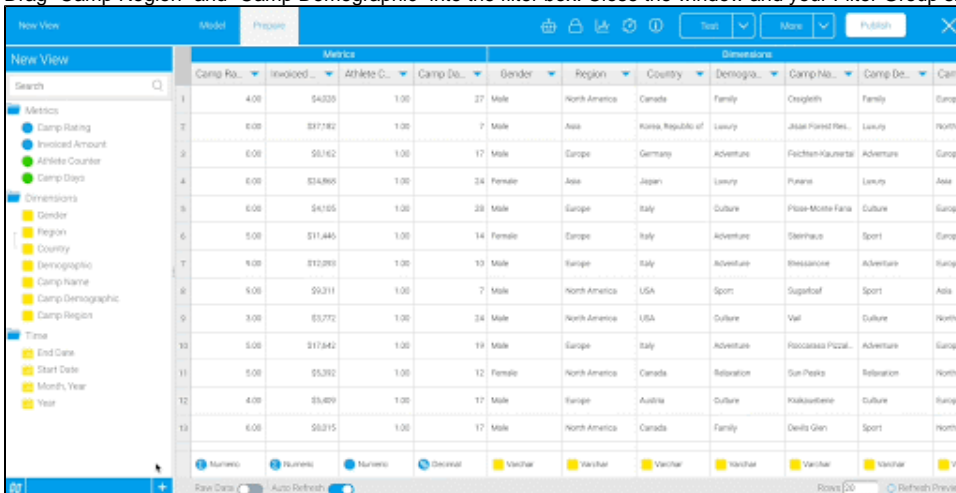


Note: See another example creating a [calculated field](#).

Create a Filter Group

There may be cases where multiple Reports will need the same set of filters, either [pre-defined](#), or [user-prompt](#). To save you adding and adjusting filters in each individual Report, you can create filter groups in the View.

- Select the  icon under the list of fields. Choose “Filter Group” from the dropdown menu.
- Enter “Camp Filters” as the *Filter Group Name* and place it in the “Dimensions” folder. Click *Submit*.
- Drag “Camp Region” and “Camp Demographic” into the filter box. Close the window and your Filter Group should appear on the left hand side.



	Camp Ra...	Involved ...	Athlete C...	Camp De...	Gender	Region	Country	Demograp...	Camp No...	Camp De...	Camp
1	4.00	\$4,038	1.00	27	Male	North America	Canada	Family	Crestleth	Family	Europe
2	0.00	\$97,182	1.00	7	Male	Asia	Korea, Republic of	Luxury	Jesse Pleind Res.	Luxury	North Am
3	0.00	\$5,162	1.00	17	Male	Europe	Germany	Adventure	Fechten-Kaunertal	Adventure	Europe
4	0.00	\$24,866	1.00	24	Female	Asia	Japan	Luxury	Puente	Luxury	Asia
5	0.00	\$4,195	1.00	28	Male	Europe	Italy	Culture	Passe-Monte Fara	Culture	Europe
6	0.00	\$11,446	1.00	14	Female	Europe	Italy	Adventure	Steinhaus	Sport	Europe
7	0.00	\$12,093	1.00	10	Male	Europe	Italy	Adventure	Rhezanone	Adventure	Europe
8	0.00	\$9,311	1.00	7	Male	North America	USA	Sport	Sugarloaf	Sport	Asia
9	3.00	\$3,772	1.00	24	Male	North America	USA	Culture	Vail	Culture	North Am
10	0.00	\$17,642	1.00	19	Male	Europe	Italy	Adventure	Piaccata Pizol	Adventure	Europe
11	0.00	\$5,392	1.00	12	Female	North America	Canada	Recreation	Sun Peaks	Recreation	North Am
12	4.00	\$5,409	1.00	17	Male	Europe	Austria	Culture	Kalkseckene	Culture	Europe
13	0.00	\$8,015	1.00	17	Male	North America	Canada	Family	Dentle Glen	Sport	North Am


Note: See information on [cached dependent filters](#).
Next, you will move all the fields into relevant folders.

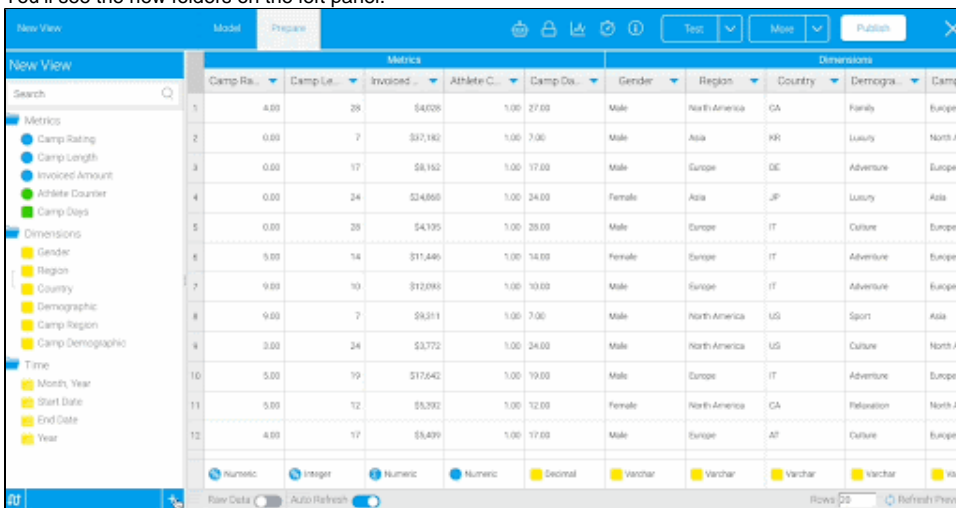
Organize the View

Assigning fields to relevant folders lets you organize your fields in a way that is logical for Report writers. You can group fields differently than how the columns were grouped in the table structure in the data source.

Fields selected in the Model phase will automatically be placed in generic “Metrics”, “Dimension”, and “Time” folders. In the following steps, you will place the fields in new folders.

Note: The field folders are purely for display purposes and contain no forms of security like the Content Folders.

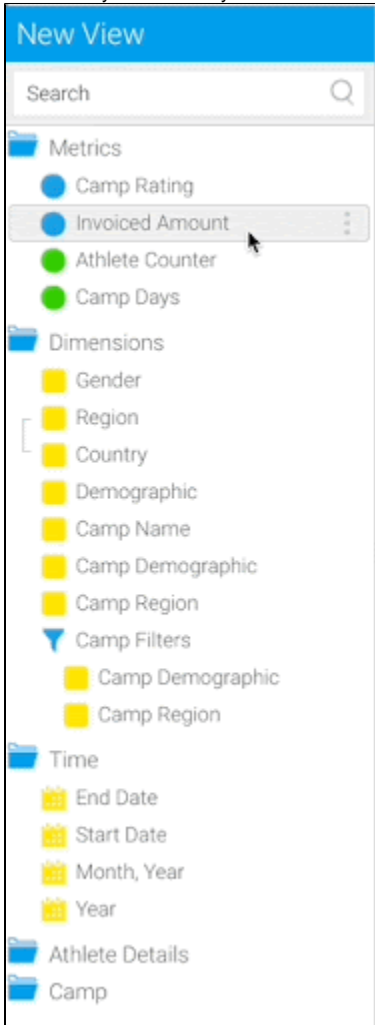
- Select the  icon under the list of fields. Choose “Add/Edit Folders” from the dropdown menu.
 - In the Field Folders popup, you can create new folders, delete existing folders and add fields to existing folders.
 - Select “Add Field Folder”.
 - The field will now appear in the list of field folders.
 - Type “Athlete Details”. Select “Add”.
 - From the *Select* dropdown, click on “Camp”. Click *Submit* to save.
- You'll see the new folders on the left panel.



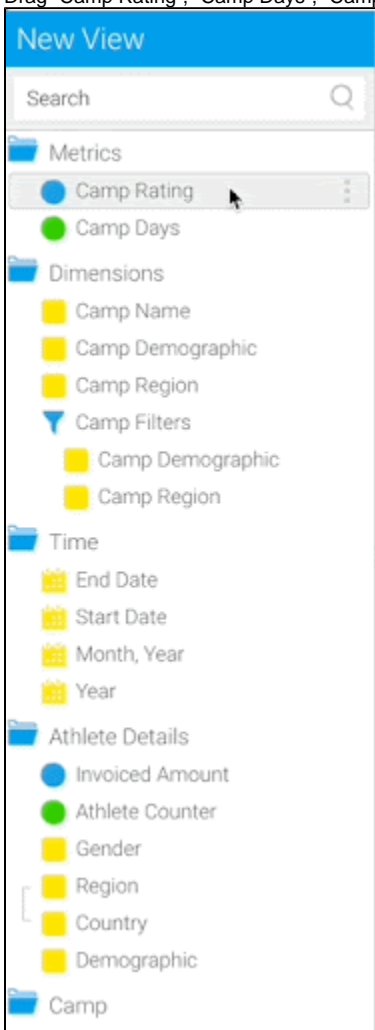
	Camp Ra...	Camp Le...	Involved ...	Athlete C...	Camp De...	Gender	Region	Country	Demograp...	Camp
1	4.00	28	\$4,038	1.00	27.00	Male	North America	CA	Family	Europe
2	0.00	7	\$97,182	1.00	7.00	Male	Asia	KR	Luxury	North Am
3	0.00	17	\$8,162	1.00	17.00	Male	Europe	DE	Adventure	Europe
4	0.00	24	\$24,866	1.00	24.00	Female	Asia	JP	Luxury	Asia
5	0.00	28	\$4,195	1.00	28.00	Male	Europe	IT	Culture	Europe
6	0.00	14	\$11,446	1.00	14.00	Female	Europe	IT	Adventure	Europe
7	0.00	10	\$12,093	1.00	10.00	Male	Europe	IT	Adventure	Europe
8	0.00	7	\$9,311	1.00	7.00	Male	North America	US	Sport	Asia
9	3.00	24	\$3,772	1.00	24.00	Male	North America	US	Culture	North Am
10	0.00	19	\$17,642	1.00	19.00	Male	Europe	IT	Adventure	Europe
11	0.00	12	\$5,392	1.00	12.00	Female	North America	CA	Recreation	North Am
12	4.00	17	\$5,409	1.00	17.00	Male	Europe	AT	Culture	Europe

Now that the folders exist, we can add fields to them.

- Drag "Invoiced Amount", "Athlete Counter", "Gender", "Region", "Country", and "Demographic" to the "Athlete Details" folder.
Note: Use your usual keyboard/mouse combination to multi-select them.



- Drag “Camp Rating”, “Camp Days”, “Camp Name”, “Camp Demographic”, “Camp Region”, and “Camp Filters” to the “Camp” folder.



- Keep “Month, Year”, “Start Date”, “End Date”, and “Year” in the existing “Time” folder.
- Delete the “Metrics” and “Dimensions” folders using the red “x” on the right of the folder name.
- Using the burger icon on the left of the folder name, drag and drop “Time” to be after “Camp”.

	End Date	Start Date	Month, Y...	Year	Invoiced...	Athlete C...	Gender	Region	Country	Demogra...	Camp
1	14/03/2017	17/02/2017	01/02/2017	01/02/2017	\$4,028	1.00	Male	North America	Canada	Family	
2	15/01/2019	08/01/2019	01/11/2018	01/01/2018	\$37,182	1.00	Male	Asia	Korea, Republic of	Luxury	
3	30/11/2014	13/11/2014	01/10/2014	01/05/2014	\$5,162	1.00	Male	Europe	Germany	Adventure	
4	09/04/2015	13/08/2015	01/01/2012	01/05/2012	\$24,888	1.00	Female	Asia	Japan	Luxury	
5	17/01/2016	29/12/2015	01/03/2015	01/07/2015	\$4,785	1.00	Male	Europe	Italy	Culture	
6	15/12/2018	01/12/2018	01/11/2018	01/01/2018	\$11,446	1.00	Female	Europe	Italy	Adventure	
7	09/12/2017	29/11/2017	01/11/2017	01/05/2017	\$12,080	1.00	Male	Europe	Italy	Adventure	
8	13/12/2015	06/12/2015	01/10/2015	01/05/2015	\$9,371	1.00	Male	North America	USA	Sport	
9	04/04/2017	02/04/2017	01/11/2016	01/01/2016	\$3,772	1.00	Male	North America	USA	Culture	
10	28/12/2018	09/12/2018	01/11/2018	01/01/2018	\$17,642	1.00	Male	Europe	Italy	Adventure	
11	23/02/2010	11/02/2010	01/08/2012	01/05/2012	\$5,292	1.00	Female	North America	Canada	Relaxation	
12	05/02/2018	21/01/2018	01/09/2017	01/05/2017	\$5,489	1.00	Male	Europe	Austria	Culture	
13	08/02/2016	10/01/2016	01/11/2015	01/01/2015	\$8,075	1.00	Male	North America	Canada	Family	
14	29/12/2016	13/12/2016	01/06/2016	01/01/2016	\$4,963	1.00	Male	Europe	Austria	Culture	
15	15/12/2018	09/12/2018	01/08/2018	01/01/2018	\$10,514	1.00	Female	Europe	Spain	Culture	

Publish the View

- Click **Publish** at the top right corner of the screen.
- Enter “Getting Started View” as the **View Title**.
- Place it in your “Getting Started with Yellowfin” folder and the “Content” sub-folder.
Note: To delete this version of your View, you can select the down arrow on the More tab on the top right menu. From there, select Delete Version.

