

Creating a Basic Data Source Connection


- [Overview](#)
- [Create a Data Source Connection](#)
 - [Cube](#)
 - [Advanced Settings](#)
 - [Connection Pool](#)
 - [Usage Parameters](#)
 - [CSV](#)
 - [Advanced Settings](#)
 - [JNDI](#)

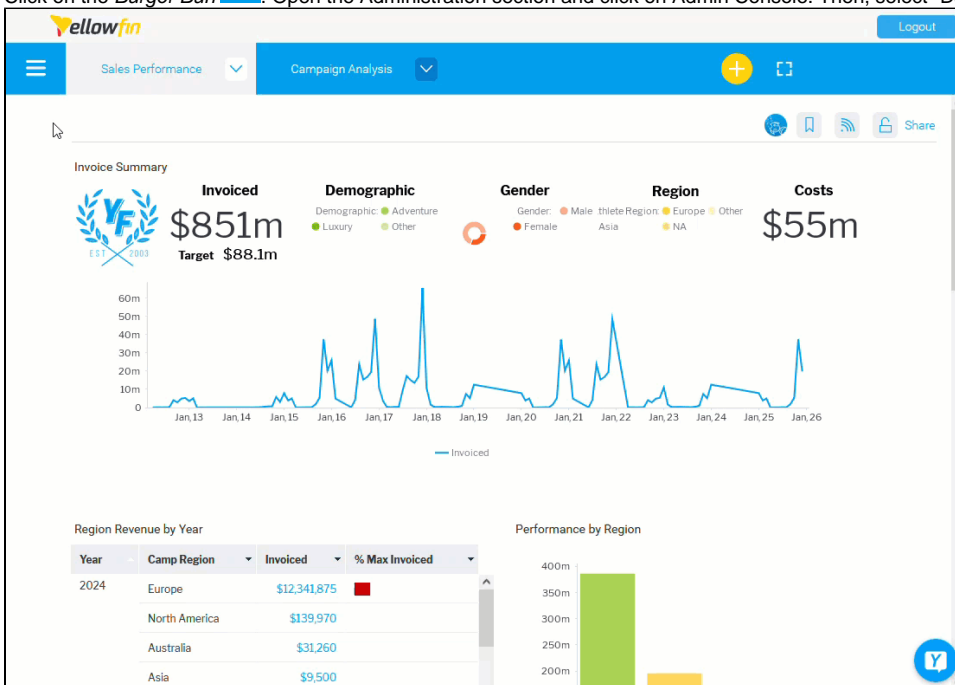
Overview

In order for Yellowfin to retrieve results to populate reports a database connection must exist. This connection record provides Yellowfin with the location, user credentials, and logon method to be used in order to access your database.

Create a Data Source Connection

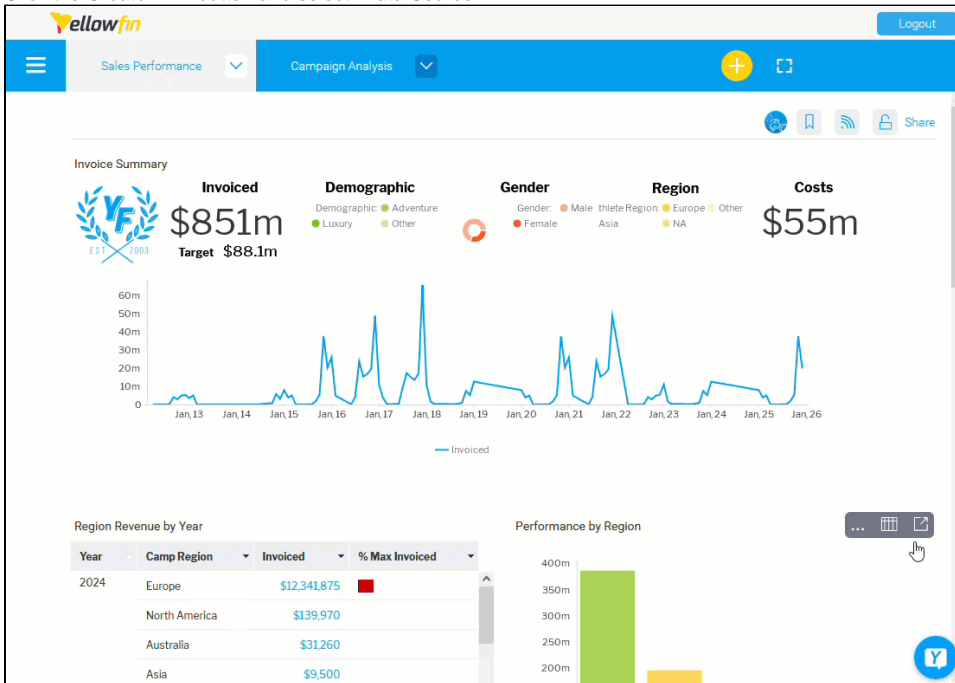
There are two ways to Add a Data Source.

- Click on the *Burger Button* . Open the Administration section and click on Admin Console. Then, select "Data Sources" and click on Add.



OR

- Click the  button and select "Data Source".



- Select your database from the Add a Data Source popup.
On the left side you will see a "Featured" list, with the most common database types and at the bottom, a list of other types of data sources, Cube, CSV, and JNDI.

Add A Data Source

- FEATURED
- Amazon Redshift
- Google BigQuery
- Microsoft SQL Server
- MySQL
- Oracle
- PostgreSQL
- Snowflake
- Cube
- CSV

Please select the kind of data source you want to add.

- Action Ingres [Add Driver](#)
- Action Pervasive [Add Driver](#)
- Action Vectorwise [Add Driver](#)
- Amazon Athena [Add Driver](#)
- Amazon RDS [Add Driver](#)
- Amazon Redshift [Add Driver](#)
- Apache Derby [Add Driver](#)
- Apache Hive [Add Driver](#)
- Apache Hive 2 [Add Driver](#)
- BMC Action Request [Add Driver](#)
- Clickhouse [Add Driver](#)

[Cancel](#)

NOTE: To enable a JNDI connection, users needs to run the following SQL against the configuration database:
`INSERT INTO Configuration(1, 'SYSTEM', 'JNDISOURCEENABLED', 'TRUE');`

On the right side, you can search for a specific database, the list will get filtered as you start typing on the Search bar. You can also select from the list, the database you want to add.

Add A Data Source

The data source you selected requires a driver installed in the application in order to make a connection. You may need to confirm with your Database Administrator which version driver your system uses. Once you have the file, upload the needed file and we can continue making a data source connection.

Amazon Athena driver needed

Driver Nickname

Driver Description (optional)

Drag and drop files here

accepted: jar, yfp

Browse Files

Back

Save

Cancel

Once the Driver is successfully installed, you will be redirected to the Database Settings. Please refer to our [JDBC Connections](#) page to check specific information for your database.

- Click on "Test Connection" to ensure a successful connection.

Once the connection is successful, the Test Connection button will turn green. Then, click Save.

Add a Data Source

How To Connect

☒ Details

☐ Connection String

You may need to speak to your Database Admin in order to get the connection settings to set this up.

Authentication Adapter

Standard Authentication

☒ Include Schema in SQL

Database Host

172.28.16.47

Database Port

54

Database Name

yellowfin_csv

JDBC Driver

org.postgresql.Driver

User Name

peter

Password

.....

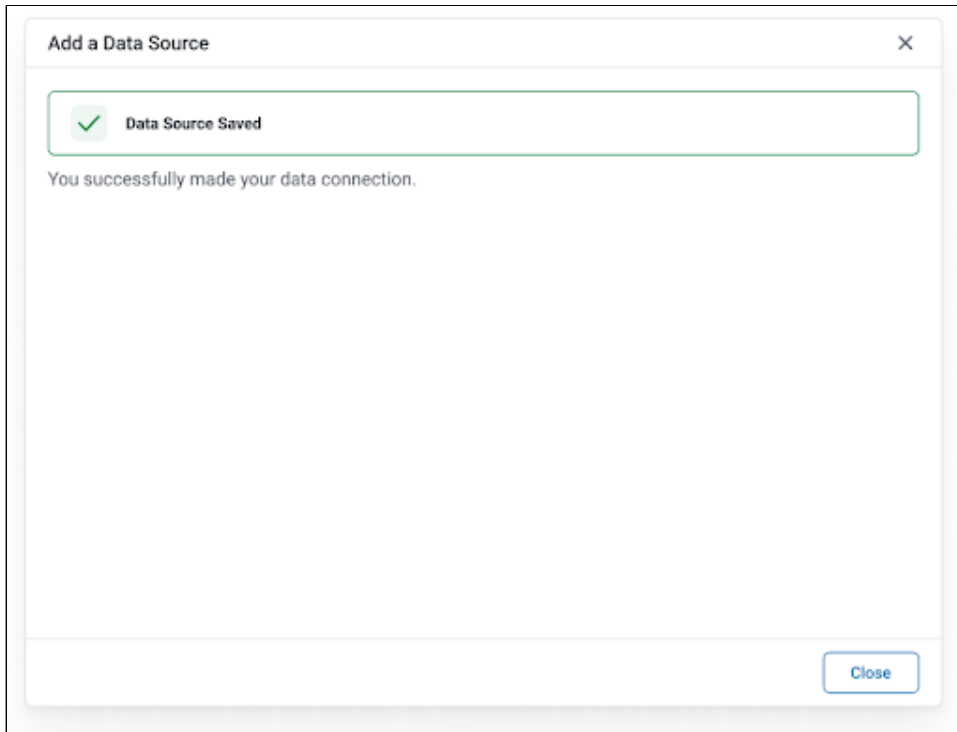
Advanced settings

Back

Save

Test Connection

Cancel



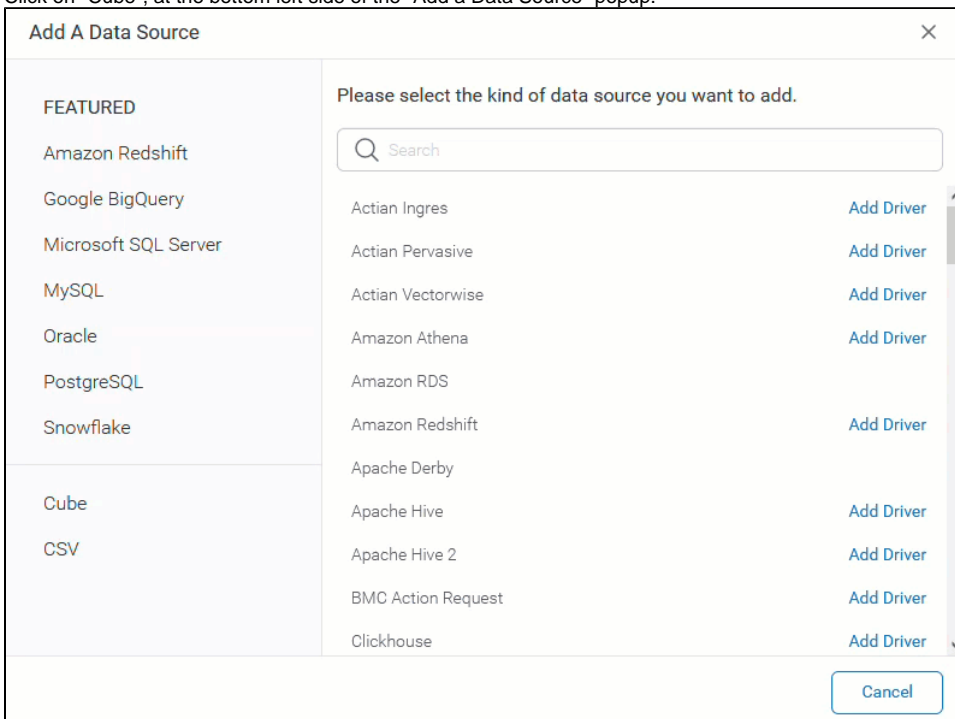
If the connection fails, you will see a "Failed Connection Test" message.

A screenshot of the "Add a Data Source" dialog for a PostgreSQL database. The title bar has a close button (X). Below the title is a section header "POSTGRESQL DATABASE" with a database icon. Below this is instructional text: "You selected your Data Source, now lets add the connection settings to start pulling in your data. Nickname, Description and Tags are for your own benefit to help manage this connection later." A red-bordered box contains a "Failed Connection Test" message with an error icon and the text: "Error reason: org.postgresql.util.PSQLException: FATAL: database 'yellowfin_csvv' does not exist". Below the error box are input fields for "Connection Nickname", "Connection Description (optional)", and "Tags (optional)" (with an "Add tags" button). There are radio buttons for "How To Connect" (selected: "Details", unselected: "Connection String"). Below this is a note: "You may need to speak to your Database Admin in order to get the connection settings to set this up." A dropdown menu for "Authentication Adapter" is set to "Standard Authentication". A checkbox "Include Schema in SQL" is checked. At the bottom are four buttons: "Back" (with a left arrow), "Save", "Test Connection" (with a red error icon), and "Cancel".

Cube

To add a Cube data source:

1. Click on "Cube", at the bottom left side of the "Add a Data Source" popup.



Add A Data Source

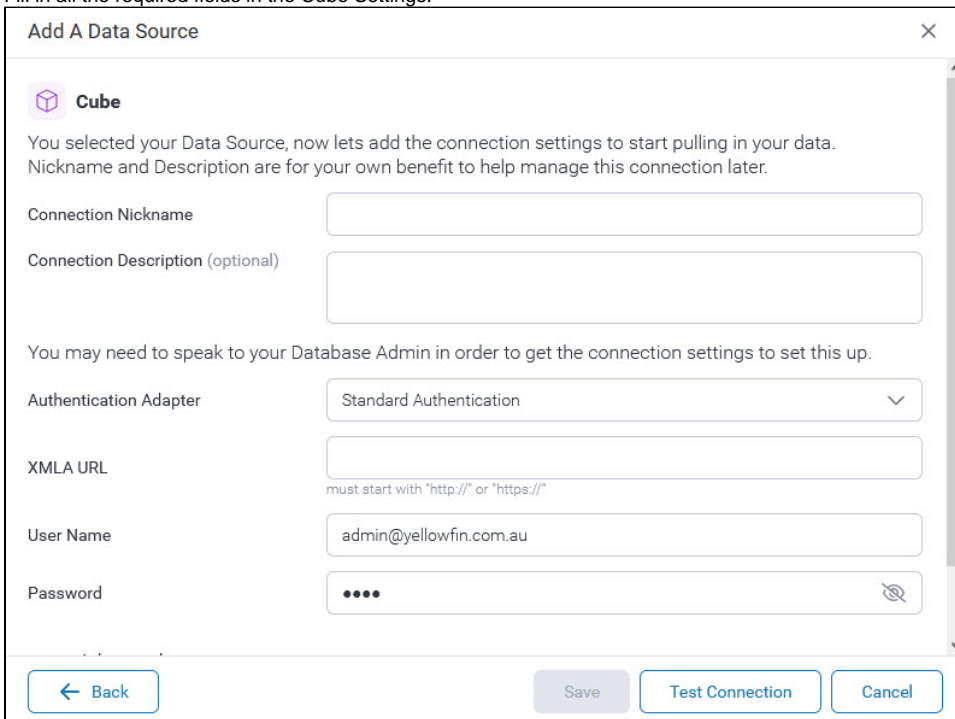
Please select the kind of data source you want to add.

Search

Action Ingres	Add Driver
Action Pervasive	Add Driver
Action Vectorwise	Add Driver
Amazon Athena	Add Driver
Amazon RDS	
Amazon Redshift	Add Driver
Apache Derby	
Apache Hive	Add Driver
Apache Hive 2	Add Driver
BMC Action Request	Add Driver
Clickhouse	Add Driver

Cancel

2. Fill in all the required fields in the Cube Settings.



Add A Data Source

Cube

You selected your Data Source, now lets add the connection settings to start pulling in your data. Nickname and Description are for your own benefit to help manage this connection later.

Connection Nickname

Connection Description (optional)

You may need to speak to your Database Admin in order to get the connection settings to set this up.

Authentication Adapter: Standard Authentication

XMLA URL

must start with "http://" or "https://"

User Name: admin@yellowfin.com.au

Password

Back Save Test Connection Cancel

Name	Description
Connection Nickname	Add a nickname to recognize your connection.
Connection Description	Add a description for your connection (optional).
Authentication Adapter	Choose between Standard Authentication, Pass-through Authentication, and Standard Authentication (No Pooling).
XMLA URL	The URL for the XMLA data source.
User Name	Enter or verify the Username for the database.
Password	Enter or verify the Password for the User Name.

Advanced Settings

Click on "Advanced" at the bottom of the Database settings screen and fill in all the required fields.

Connection Pool

CONNECTION POOL

Min Connections ⓘ

1

Max Connections ⓘ

5

Refresh Time ⓘ

180

Timeout ⓘ

180

Name	Description
Min Connections	The minimum number of connections that can be opened simultaneously.
Max Connections	The maximum number of connections to be opened simultaneously.
Refresh Time	The number of minutes between connection resets.
Timeout	The seconds a connection can remain open before it is closed.

Usage Parameters

USAGE PARAMETERS

Time zone ⓘ

Australia

Sydney (+11:00)

Broadcast ⓘ

☒ Enable

Subscribe ⓘ

☒ Enable

Name	Description
Time zone	Select a time zone for this data source connection.
Broadcast	Specify if the content on the connection can be broadcasted or not.
Subscribe	Specify if the content on the connection can be subscribed or not.

3. Click on "Test Connection" to ensure a successful connection. Then, click Save.
Visit [XMLA Data Source](#) for more information.

CSV

To add a CSV data source:

1. Click on "CSV", at the bottom left side of the "Add a Data Source" popup.
Note: You need a writable database to store your spreadsheets. Check our [Writable Data Source](#) section for more information on how to have a writable data source.

Add A Data Source

FEATURED

Amazon Redshift

Google BigQuery

Microsoft SQL Server

MySQL

Oracle

PostgreSQL

Snowflake

Cube

CSV

Please select the kind of data source you want to add.

Search

Action Ingres

Action Pervasive

Action Vectorwise

Amazon Athena

Amazon RDS

Amazon Redshift

Apache Derby

Apache Hive

Apache Hive 2

BMC Action Request

Clickhouse

Add Driver

Add Driver

Add Driver

Add Driver

Add Driver

Add Driver

Add Driver

Add Driver

Add Driver

Add Driver

Cancel

If the database is not writable, you will see an error message in the CSV Settings screen.

Add A Data Source

CSV

After uploading your CSV you can preview the data in a table and choose how you want to use it.

No Writable Database

Error reason: To store your spreadsheets you need a writable database. You do not have a repository defined.

Connection Nickname

Connection Description (optional)

Data Storage

Select Source

Data Storage not here? Make sure you've enabled it as writable data source.

Drag and drop files here

accepted: csv

Browse Files

Back

Prepare Data

Cancel

- Fill in all the required fields in the CSV Settings.
Add a Nickname, a Description (optional), select the data source, and Drag and drop or browse the file to install. Then, click Save.
Note: Only CSV files are accepted.

Add A Data Source

CSV

After uploading your CSV you can preview the data in a table and choose how you want to use it.

Connection Nickname

Connection Description (optional)

Data Storage

Test

Data Storage not here? Make sure you've enabled it as writable data source.

Advanced

Drag and drop files here
accepted: csv

Browse Files

Back

Prepare Data

Cancel

Advanced Settings

Click on "Advanced" at the bottom of the Database settings screen and fill in all the required fields.

Field Separator

Comma

Decimal Separator

Comma

Thousand Separator

File Encoding

Precision

Low Precision

3. Click on "Prepare Data" to see the data table.
Visit [CSV Data Imports](#) for more information.

JNDI

Remember the JNDI data source connection types is enabled by running the following SQL against your configuration database:
INSERT INTO Configuration(1, 'SYSTEM', 'JNDISOURCEENABLED', 'TRUE');
Visit [Running Custom SQL](#) for more information.

To add a JNDI data source:

1. Click on "JNDI", at the bottom left side of the "Add a Data Source" popup.

Add A Data Source

FEATURED

- Oracle
- Microsoft SQL Server
- PostgreSQL
- MySQL
- Snowflake
- Amazon Redshift
- Google BigQuery
- CSV
- Cube
- JNDI

Please select the kind of data source you want to add.

Search

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- Action Vectorwise
- Amazon Athena [Add Driver](#)
- Amazon RDS
- Amazon Redshift
- Apache Derby
- Apache Hive
- Apache Hive 2
- BMC Action Request
- Clickhouse

Cancel

2. Fill in all the required fields in the JNDI Settings.

Add a Data Source

JNDI

You selected your Data Source, now lets add the connection settings to start pulling in your data. Nickname, Description and Tags are for your own benefit to help manage this connection later.

Connection Nickname

Connection Description (optional)

Tags (optional)

Tag1 Tag2 Tag3

You may need to speak to your Database Admin in order to get the connection settings to set this up.

JNDI Datasource Name

Back Save Test Connection Cancel

3. Click on "Test Connection" to ensure a successful connection. Then, click Save.