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.

New Conne	ection	×
Select y	our data source	
		53
Database	Database	SV
Or choc	Create a data source connection using JDBC.	
Google An	Google Sh Xero	
Not here?	Search marketplace or upload ne	s\//
NUTHERE	Search marketplace of upload he	SVV.

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.

New Connection				\times
Connection Setti	Create View	Analyse		
Name:				
Description:				
Database Type:		Select	\sim	
Username:				
Password:				
	Crea	ite View		\sim

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.

New Connection		×
Connection Setti Create View	An	alyse
Name:	Ski Team D	ata
Description:	Tutorial dat Team busir	a based on the Ski ness.
Database Type:	Microsoft S	SQL Server 🗸
Include Schema in SQL:	~	
Database Host:	localhost	
Use Named Instance:		
Database Port:	1433	Advanced Connection Editor
Database Name:	NewSkiTe	Test Connection
Database Authentication:	SQL Authe	Create View
SSL Required:	Disabled	Save & Close
		Cancel
Crea	ate View	\sim

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.

	U	
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 Veliowfin forum or with the find the newer you are looking for.	Connection Description Ski Team Data Tutorial data based on the Ski Team business. + Add tags	Save
Availability Available. The connection to this Data Source was successful.	Connection Settings	
	Security 6 ^	
	Usage Parameters	

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.

Connection	Connection		
Let's make this easy. You can edit and manage your data source connection parameters here.	Connection Description Connection Settings	^	S
This includes Connection Settings, Security, and Access Filters. Need help? Visit the 'Velowfin forum or wikk to find the answers you are looking for.	Connection Method Specify the type of connection required. Authentication Adapter Specify if you wish to use the standard database authentication method, or pass through system user authentication to the database.	JOBC Standard Authentication	
Availability Available. The connection to this Data Source was successful.	Database Type Specify the type of database to connect to. Include Schema in SQL Include the schema name when addressing tables in SQL queries.	Microsoft SQL Server	
	Database Host Specify the name of the server hosting the database. Use Named Instance	localhost	
	Specify the name of the SQL Server instance. Database Port Define the TCP/IP port number the database is running on.	1433	
	Database Name Specify the name of the database.	NewSkiTeam	
	Database Authentication	SQL Authentication	/

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.

=		U	
Connection	Connection		\times
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? Viat the Yellowfin forum or wite b find the answers you are looking for:	Connection Description Connection Settings Connection Pool Min Connections Define the minimum number of connections to be open simultaneously. Max Connections Define the maximum number of connections to be open	^ ^ ~ 1 5	Save
Availability Availabie: The connection to this bata Source was successful.	simultaneously. Refresh Time Define the number of hours between connection resets. Timeout Define the seconds a connection can remain open before it is closed.	3	
	Use secondary pool Enable the use of a secondary connection pool for this database, for the p background tasks. Security Access Filters	purposes of running	
	Usage Parameters	^	
	Views and Content		

Security

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

■ Connection	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. Image: Colspan="2">Need help? Wait the Yellowin forum or with to find the nawera you are looking for. Image: Colspan="2">Availability Availabile. The connection to this Data Source was assessed.	Connection Description Connection Settings Connection Pool Security Access Level Allow only specified users, with required role permissions, to access and use this connection for view creation and freehand SQL reports. Teresa Pringle	^ ^ ^ Public ← ○ Private ← ●	Save
	Add Member Access Filters Usage Parameters Views and Content		

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.
- 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.

===		+	
Connection	Connection		\times
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 Velowinf orum or with the find the nervers you	Connection Description Connection Settings Connection Pool Security Access Filters	^ ^ ^ ^ ~	Save
are looking for. Availability Available. The connection to this Data Source was successful.	Name None Found	Configure Reference Types Add	
	Usage Parameters Views and Content	^ ^	

See Restricting Data with Access Filters for more information.

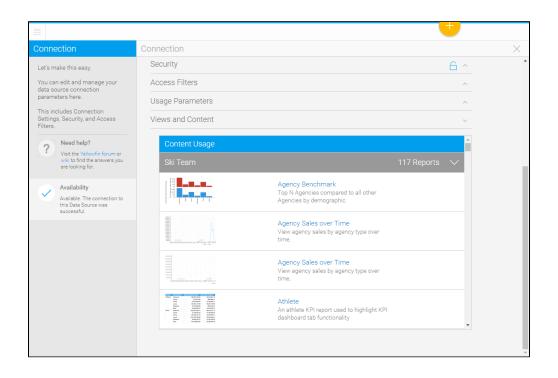
Usage Parameters

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

	Connection	
Let's make this easy.	Usage Parameters	^
You can edit and manage your data source connection parameters here.	Max Rows Returned Specify if there should be a limit to the number of rows returned by queries run on this connection.	•
This includes Connection Settings, Security, and Access Filters.	Max Rows Returned Define a limit for the number of rows returned by queries run on this connection.	
? Need help? Visit the Yellowfin community or wiki to find the answers you are looking for.	Writable Specify if the system can write to this database, rather than just read.	
Availability	Time zone Specify the time zone associated with this database connection and Australia	
Available. The connection to this Data Source was successful.	specify the other 20the associated with this batabase connection and any related schedules. Sydney (+10:00)	~
	Broadcast Specify if content based on this connection can be broadcast.	
	Subscribe Specify if content based on this connection can be subscribed to.	•
	Data Profiling Data Profiling is available in views using this data source.	
	Client Data Source	
	Inherit Access Filters from client source Inherit Access Filters from client source	
	Views and Content	~

Views & Content

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



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