Microsoft SQL Server

Follow the instructions below to connect Yellowfin to a Microsoft SQL Server database.

1. Click on the Create button and choose the data source option.

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2. Then select the database option.
3. When the New Connection popup appears, provide a name and description for your database.
4. Choose **Microsoft SQL Server** from the list of available database options. New configuration fields will appear on doing so.

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5. Select the **Include Schema in SQL** checkbox to include the schema name when addressing database tables in SQL queries.
6. Next, enter the name or IP address of the server hosting the SQL server database.
7. From the Driver drop down list, select one of the two drivers available for SQL server.
8. Next, specify if you want to create a default instance or a named instance of SQL Server. If an instance of Microsoft SQL Server is not already installed then a default one will be created, unless a named instance has been specified.
   a. To specify a named instance, first select the **Use Named Instance** checkbox, and then enter the name of the instance in the new field.

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9. The default TCP/IP port number for the SQL server database will automatically appear.
10. Specify the name of the database containing the data that you require.
11. From the Database Authentication list, choose an authentication method for the database.

    On selecting the **Windows Authentication** method, you will need to provide the domain name as well.
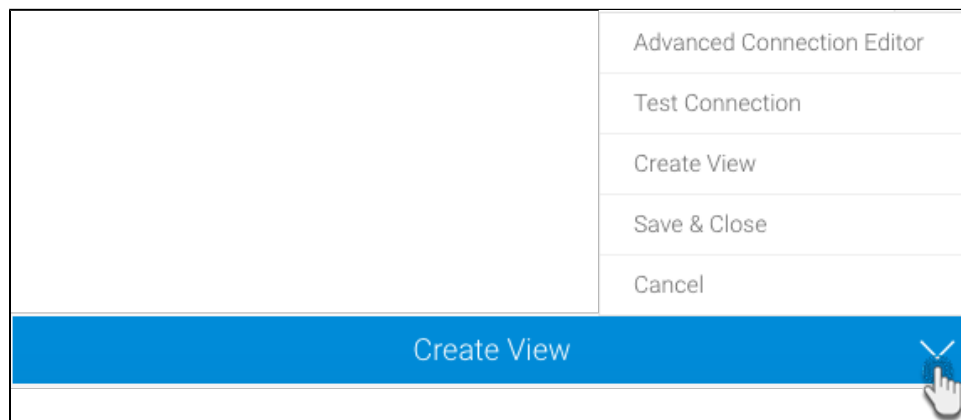
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12. From the SSL dropdown list, choose whether or not the Secure Sockets Layer should be enabled to encrypt data.
13. Select the **Use Custom Fetch Size** checkbox if you want a specific number of data rows to be retrieved from the database after a query is executed, rather than fetching its entire result. Then specify the number of rows in the *Fetch Size* field. Doing so will allow Yellowfin to process data faster.

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14. The selected JDBC driver option appears based on your selected in step 7.

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15. Enter the username and password of your SQL server database account.
16. Once you have completed your connection information, you will have several options:

    a. **Advanced Connection Editor:** This will take you to the Data Source page in the Admin Console and allow you to edit all the advanced options available for your database.
    b. **Test Connection:** This will test the connection parameters you provided to ensure it can connect to your database. If the connection was successful, a message will appear.
    c. **Create View:** This will save your connection and get you started on creating a view based on it.
    d. **Save & Close:** This will allow you to save your connection and close the New Connection popup, returning you to the page you were on previously.
    e. **Cancel:** This closes the New Connection popup without saving your connection, returning you to the page you were on previously.
17. We recommend testing the connection, and then saving it by using the Save & Close button.