

Creating a Basic Data Source Connection

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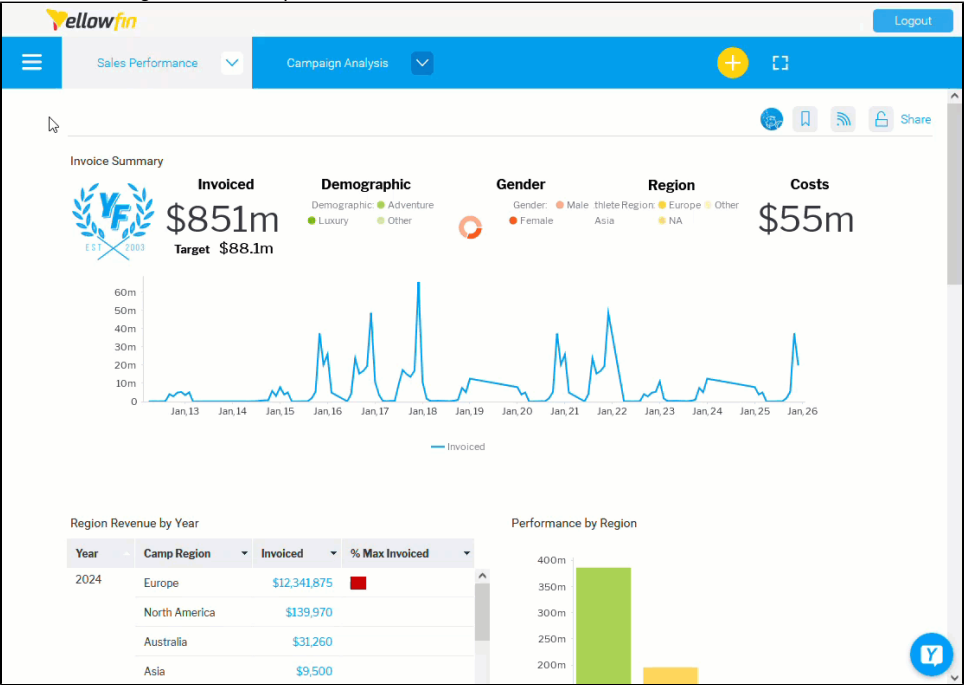
Overview

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

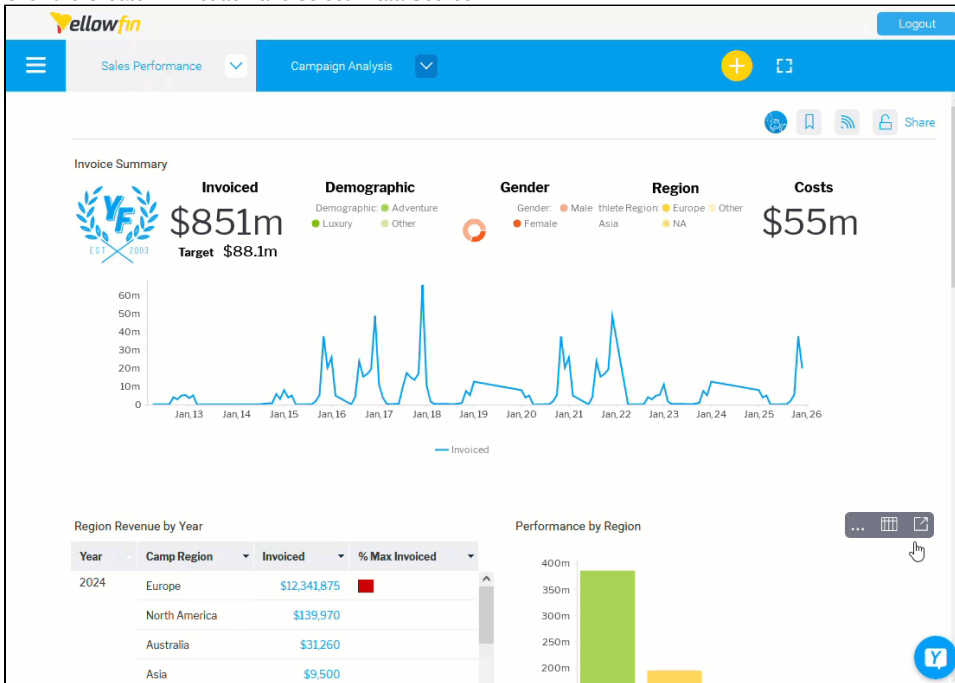
There are two ways to Add a Data Source.

- 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.

Search

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

×

FEATURED

Amazon Redshift

Google BigQuery

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Oracle

PostgreSQL

Snowflake

Cube

CSV

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

Q Search

Action Ingres

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Action Pervasive

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Amazon Athena

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Amazon RDS

Amazon Redshift

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Apache Derby

Apache Hive

Add Driver

Apache Hive 2

Add Driver

BMC Action Request

Add Driver

Clickhouse

Add Driver

Cancel

If a data source requires a Driver, click on the “Add Driver” on the right side of the Database name.

Add A Data Source

×

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Apache Hive

Add Driver

Apache Hive 2

Add Driver

BMC Action Request

Add Driver

Clickhouse

Add Driver

Cancel

- Add a Nickname, a Description (optional) and Drag & drop or browse the file to upload. Then, click Save.
NOTE: Only .jar and .yfp files are accepted.

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

☒ Include Schema in SQL

Database Host

Database Port

Database Name

JDBC Driver

User Name

Password

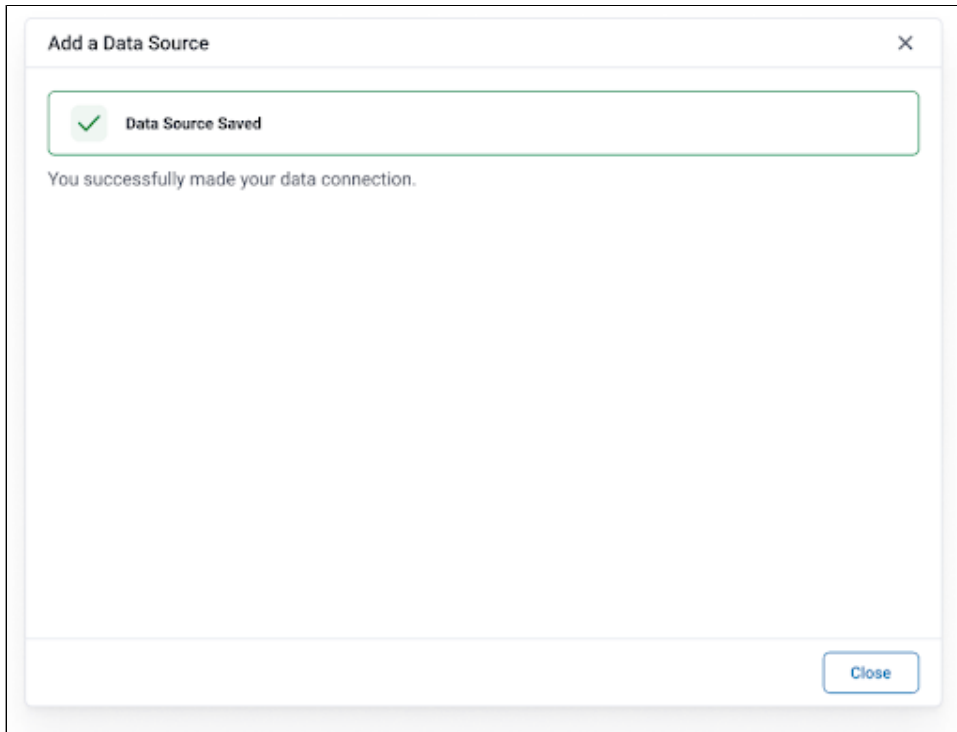
Advanced settings

← Back

Save

✓ Test Connection

Cancel



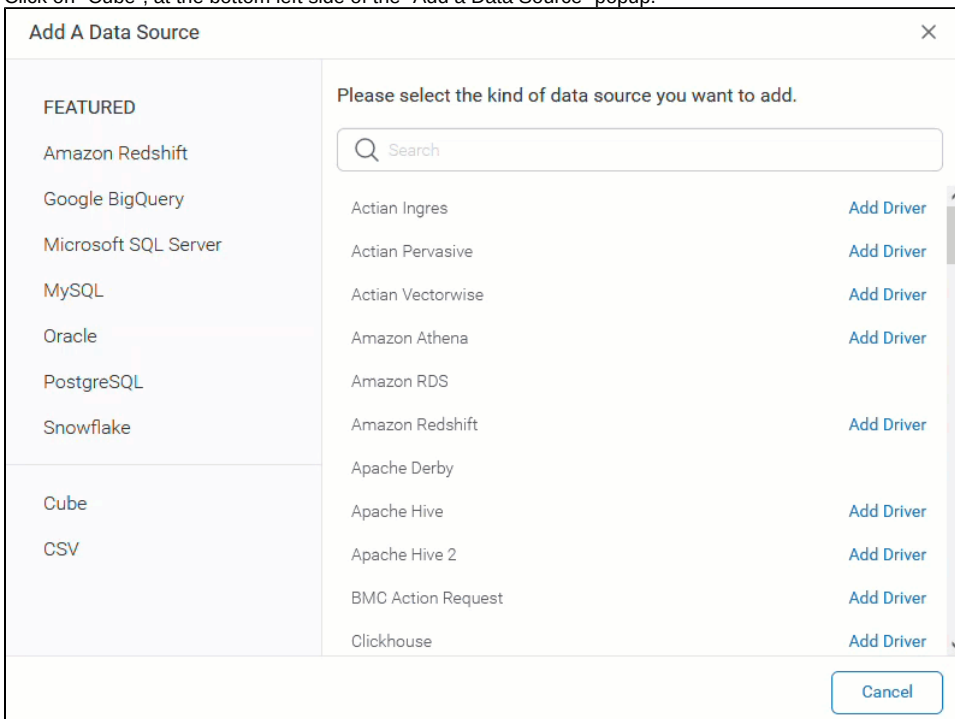
If the connection fails, you will see a "Failed Connection Test" message.

A screenshot of a web application dialog titled "Add a Data Source". At the top right is a close button (X). Below the title bar is a section for "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." Below the text is a red-bordered box containing a red warning icon, the text "Failed Connection Test", and the error message "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. Below these is a "How To Connect" section with radio buttons for "Details" (selected) and "Connection String". Below that is a note: "You may need to speak to your Database Admin in order to get the connection settings to set this up." Below the note is an "Authentication Adapter" dropdown menu showing "Standard Authentication" and a checked checkbox for "Include Schema in SQL". At the bottom are four buttons: "Back" (with a left arrow), "Save", "Test Connection" (with a red warning 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

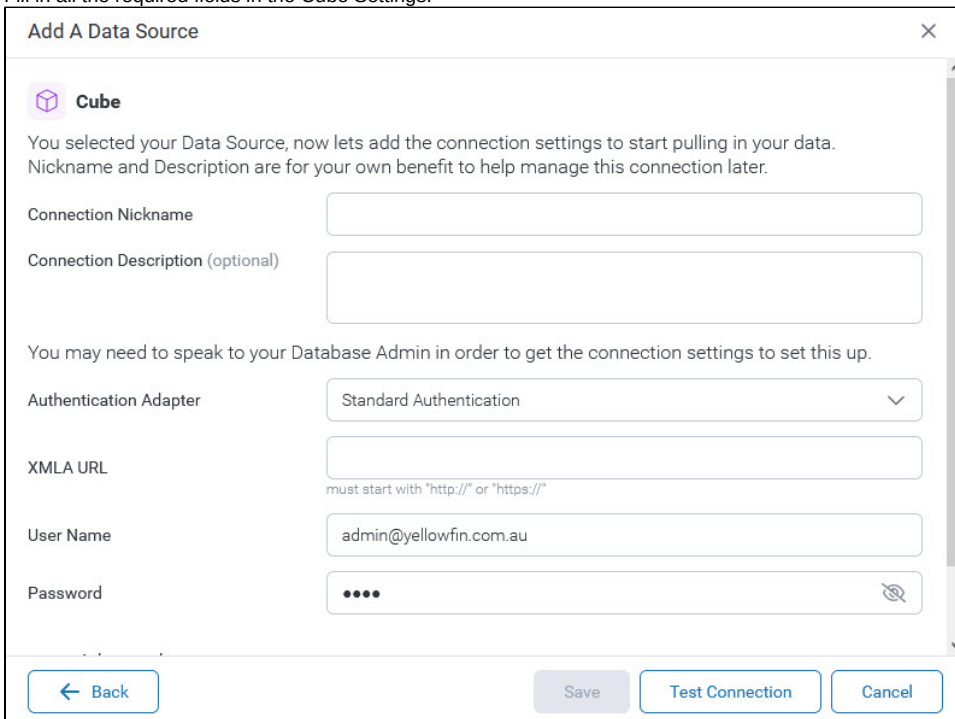
Please select the kind of data source you want to add.

Search

Amazon Redshift	Add Driver
Google BigQuery	Add Driver
Microsoft SQL Server	Add Driver
MySQL	Add Driver
Oracle	Add Driver
PostgreSQL	Add Driver
Snowflake	Add Driver
Cube	
CSV	

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

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

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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

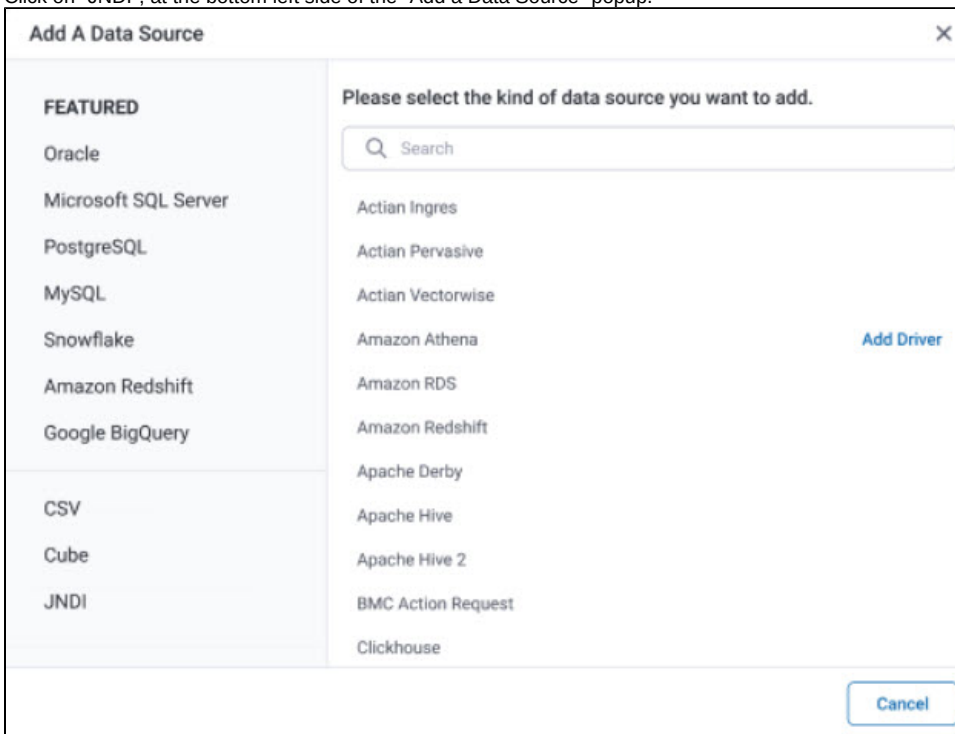
3. Click on "Prepare Data" to see the data table.
Visit [CSV Data Imports](#) for more information.

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.

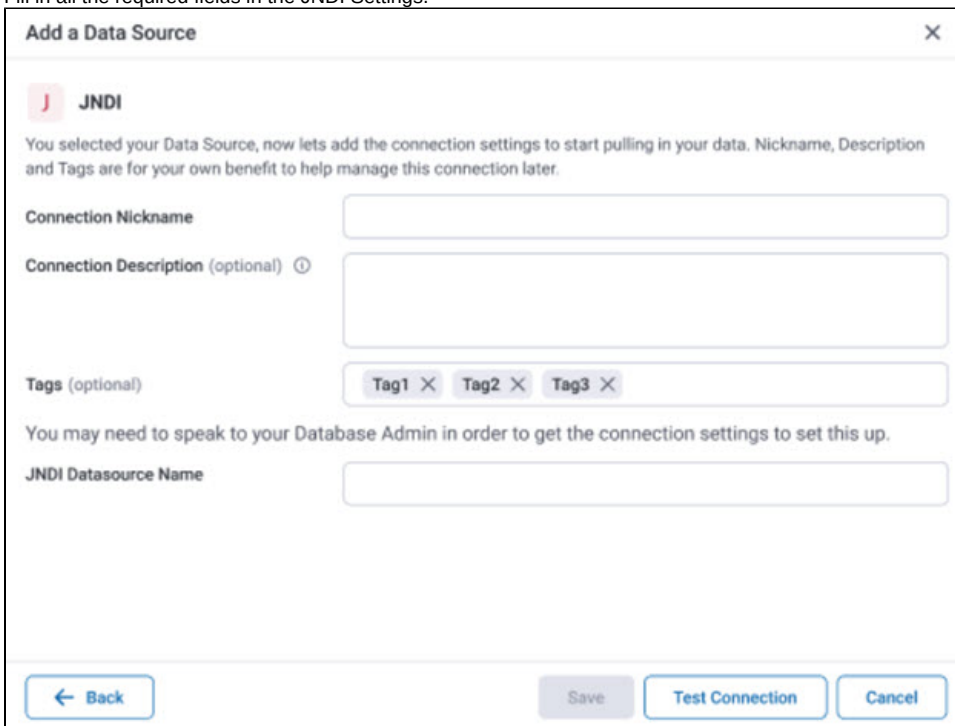
To add a JNDI data source:

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



The screenshot shows a modal window titled "Add A Data Source" with a close button (X) in the top right corner. On the left, there is a sidebar under the heading "FEATURED" containing a list of data sources: Oracle, Microsoft SQL Server, PostgreSQL, MySQL, Snowflake, Amazon Redshift, Google BigQuery, CSV, Cube, and JNDI. The "JNDI" option is highlighted. To the right of the sidebar, the main area is titled "Please select the kind of data source you want to add." and contains a search bar with a magnifying glass icon and the word "Search". Below the search bar is a list of data sources: Action Ingres, Action Pervasive, Action Vectorwise, Amazon Athena, Amazon RDS, Amazon Redshift, Apache Derby, Apache Hive, Apache Hive 2, BMC Action Request, and Clickhouse. A blue link "Add Driver" is positioned to the right of "Amazon Athena". At the bottom right of the modal is a "Cancel" button.

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



The screenshot shows the "Add a Data Source" modal window with the "JNDI" data source selected. The header "JNDI" is displayed with a red icon. Below the header, a message states: "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." The form contains the following fields: "Connection Nickname" (a text input field), "Connection Description (optional)" (a text input field with an information icon), "Tags (optional)" (a field containing three tags: "Tag1", "Tag2", and "Tag3", each with a close button), and "JNDI Datasource Name" (a text input field). A message below the tags field says: "You may need to speak to your Database Admin in order to get the connection settings to set this up." At the bottom of the modal are four buttons: "Back" (with a left arrow), "Save", "Test Connection", and "Cancel".

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