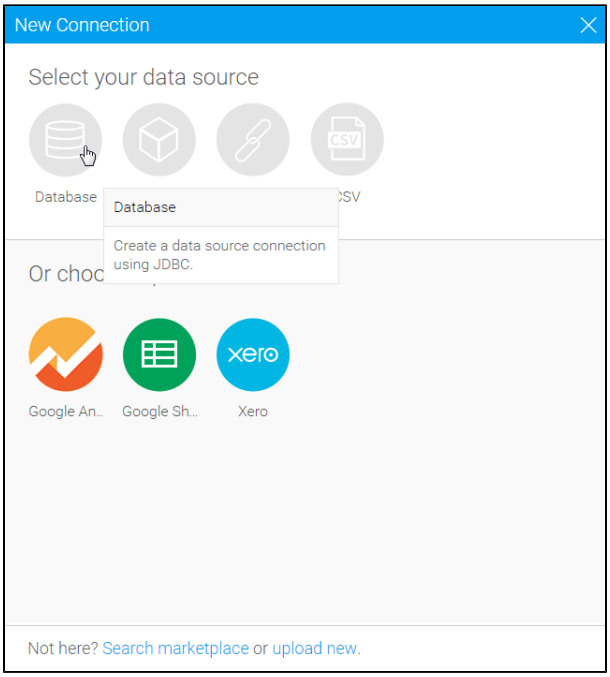
Understanding Source Connection Parameters

- Overview
- New Connection Window
    - Next Steps
- Advanced Connection Editor
    - Connection Description
    - Connection Settings
    - Connection Pool
    - Security
    - Access Filters
    - Usage Parameters
    - Views & Content

Overview

top

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.



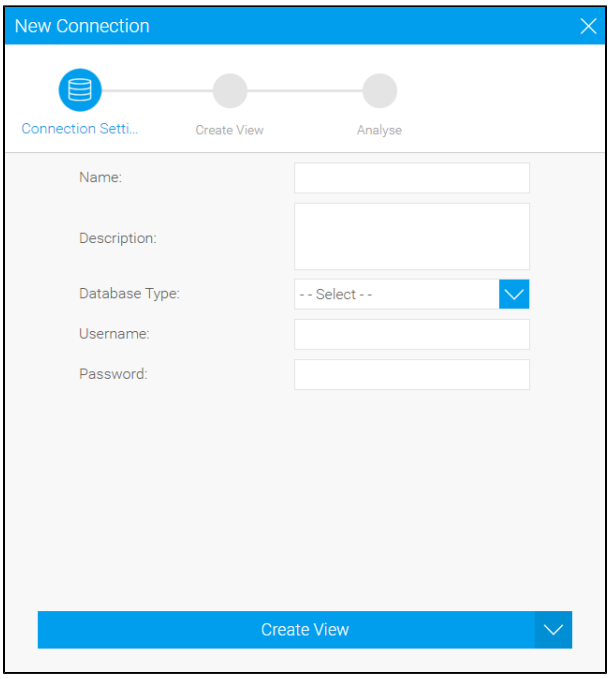
This page will be dedicated to exploring parameters available when connecting to a database.

> *See Third Party Connectors for or CSV Data Imports for more information on other types of connection.*

New Connection Window

top

When creating your new database connection, you will be presented with a basic list of details to complete.



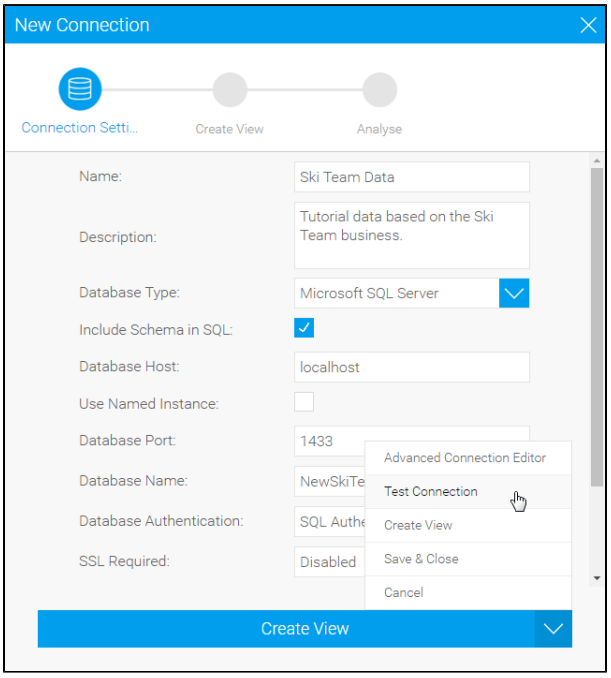
This will include;

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.



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.

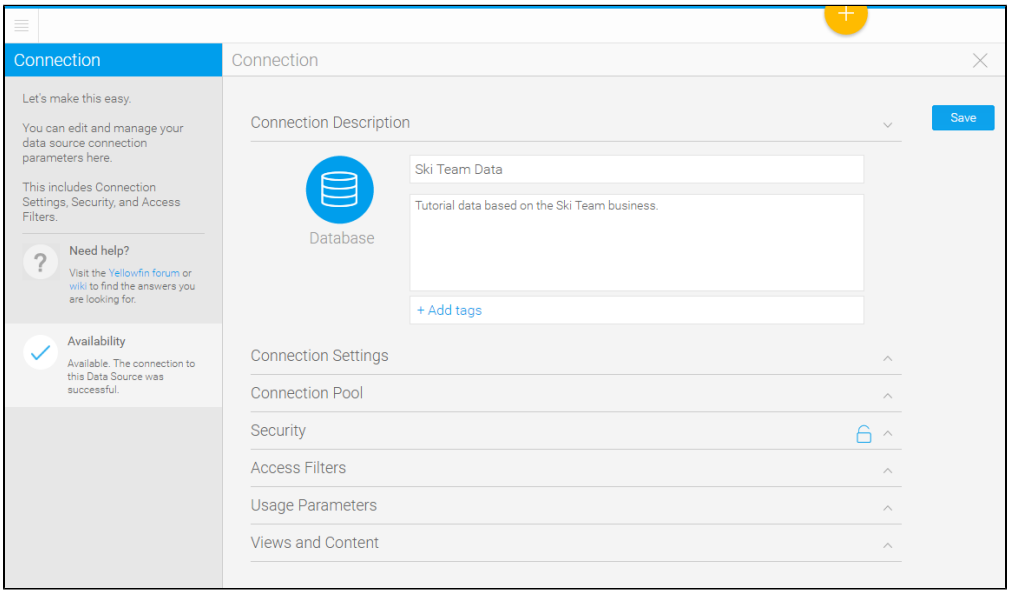
Advanced Connection Editor

top

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

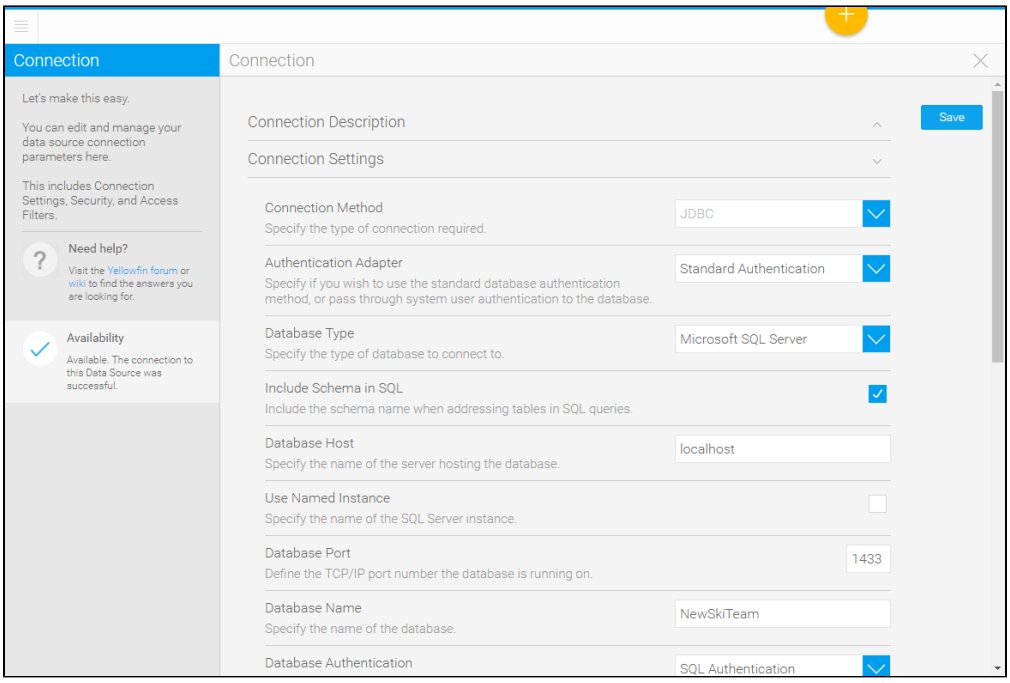
This section allows you to define the basic metadata for your connection; **Name**, **Description**, and **Tags**. These items should be descriptive as users will need them in order to identify the connection when building content.



Connection Settings

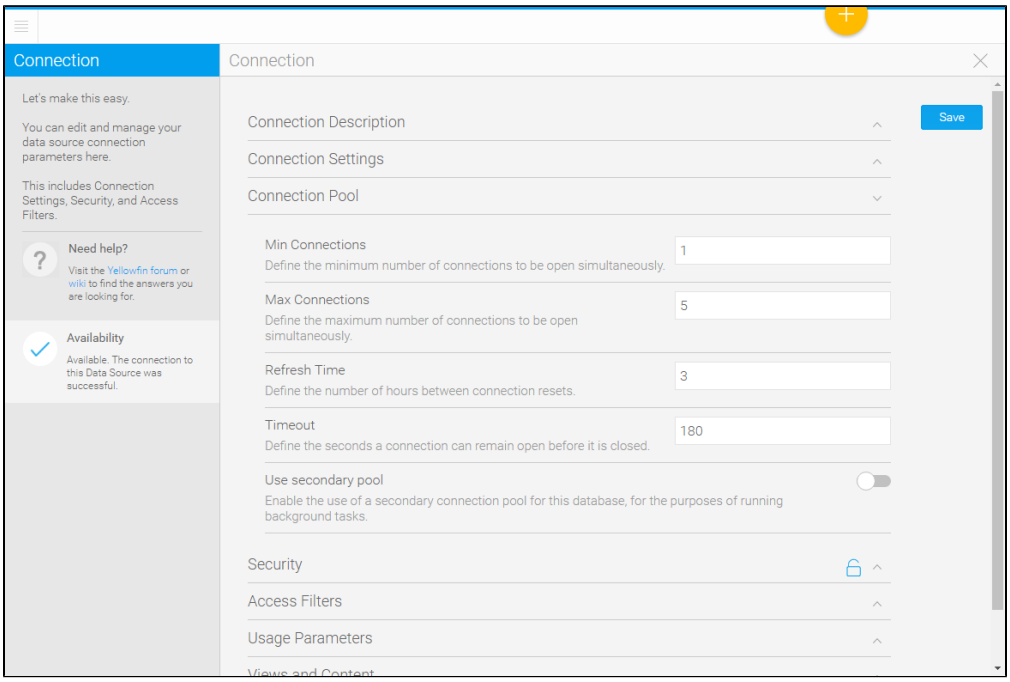
These are the connection parameters that need to be defined in order for Yellowfin to know how to access your database.

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.



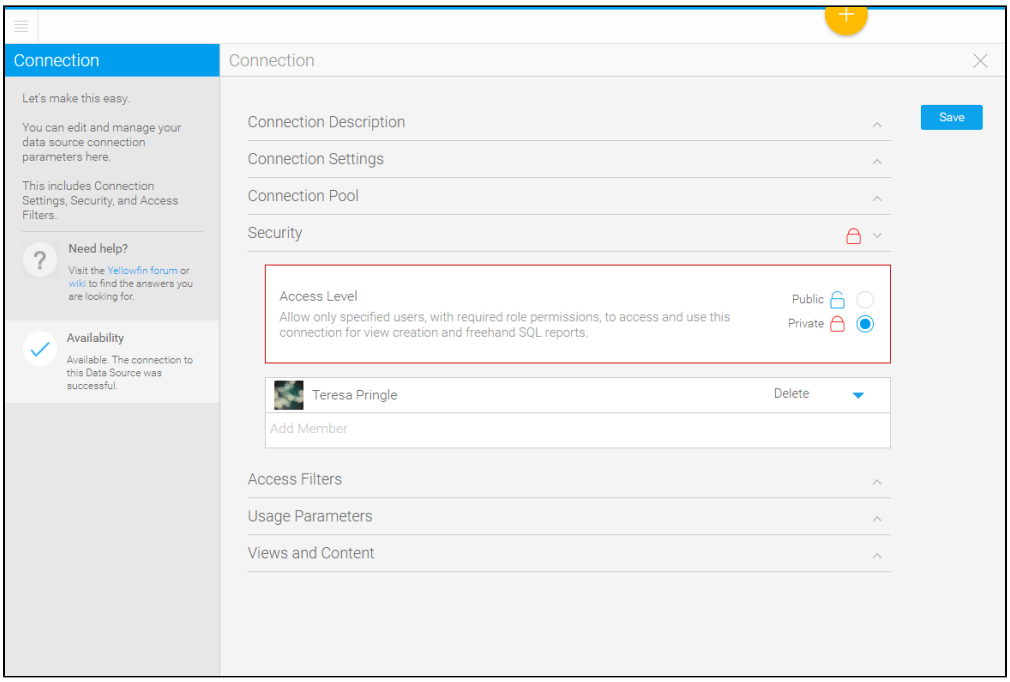
Connection Pool

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.



Security

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



There are two main options available:

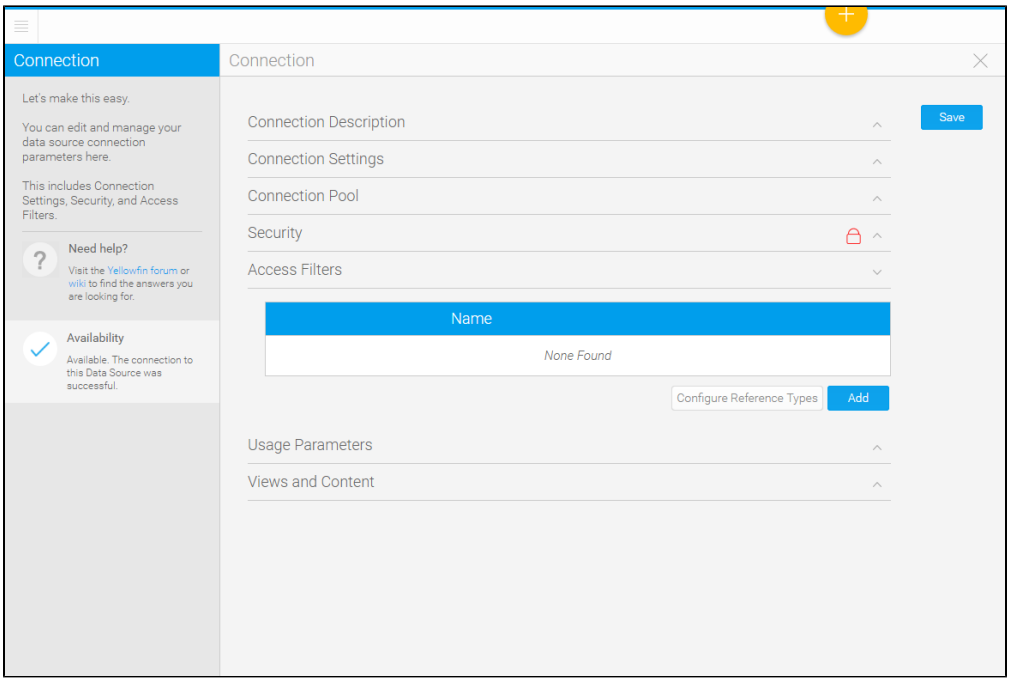
1. **Public**: allow all users with required role permissions to access and use this connection for view creation and freehand SQL reports.
2. **Private**: allow only specified users, with required role permissions, to access and use this connection for view creation and freehand SQL reports.

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.
2. **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

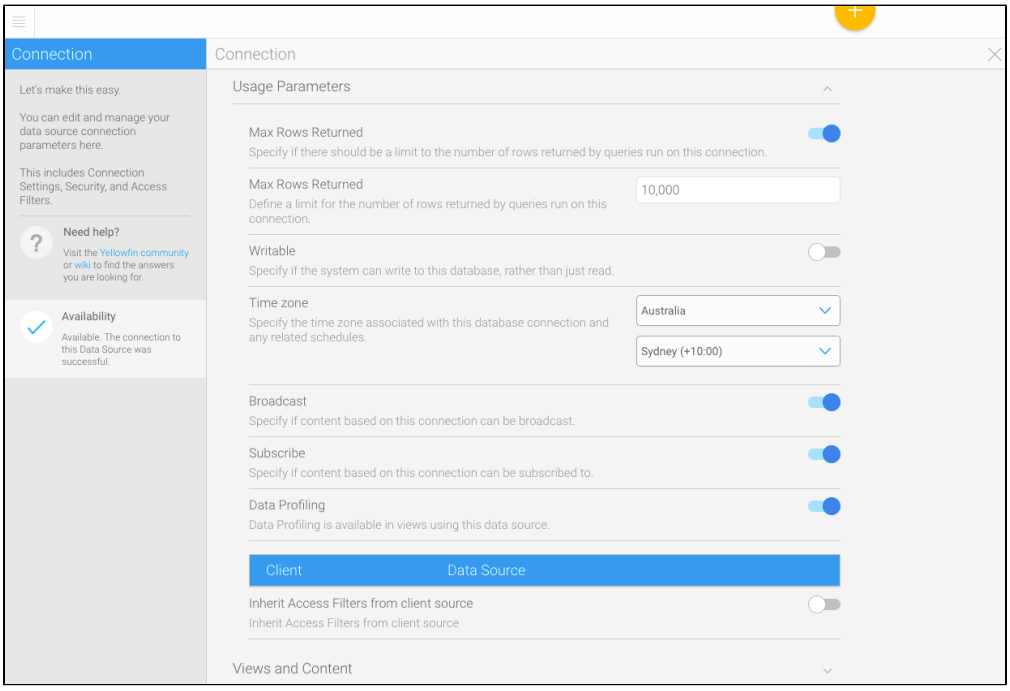
This list allows you to add new, and manage existing, access filters.



> *See Restricting Data with Access Filters for more information.*

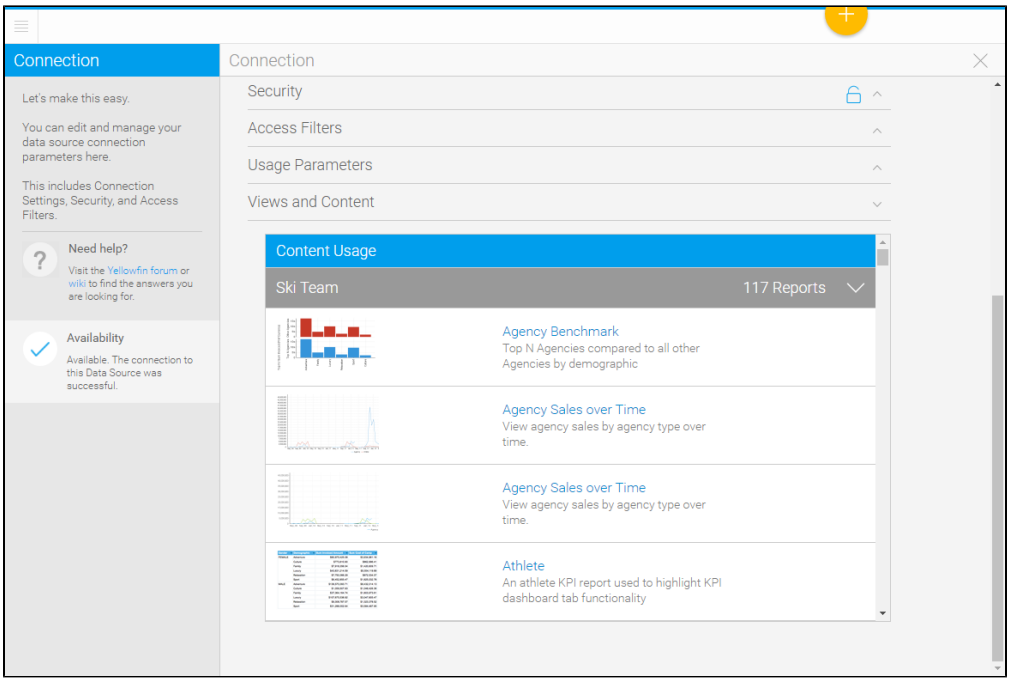
Usage Parameters

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



Views & Content

This allows you to view a list of content that has been created based on this data source 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.
Need help?
Visit the Yellowfin forum or wiki to find the answers you are looking for.
Availability
Available. The connection to this Data Source was successful.
Security
Access Filters
Usage Parameters
Views and Content
Content Usage
Ski Team
117 Reports
Agency Benchmark
Top N Agencies compared to all other Agencies by demographic
Agency Sales over Time
View agency sales by agency type over time.
Agency Sales over Time
View agency sales by agency type over time.
Athlete
An athlete KPI report used to highlight KPI dashboard tab functionality

top