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.