Glossary

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Overview

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As with any new piece of software, there are new terms and names to learn. Here is a list of terms we use that are commonly asked about.

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Term	Description
Active	Glossary#Yellowfin content can have two possible states: **Active** and **Draft**. If the content is complete and the user has **Activated** it, the content will be in an **Active** state, which enables it to be used by other users. This means that the Glossary#View / Glossary#Report / Glossary#Dashboard / Glossary#Category / Sub Category, etc, can be used as designed.
Administrator	This is a user that manages the system. Generally Administrators create the source connections, views, and report categories and maintain all of the system options including users, security, and licences. Their role permissions are the least restricted, generally granting them access to all functionality available.
Advanced Function	These are predefined calculations that can be applied to fields in a report. They run after the results are returned from the database as they are not part of the Glossary#SQL query. *See Advanced Functions for more information*
Aggregate	Rather than displaying each unique row (or all rows including repeats if 'Show Duplicate Records' is enabled), Glossary#Yellowfin will show one row per unique category (or combinations). You will select from a range of aggregation options to do this. For example, if **Sum** is selected then Yellowfin will add all the numeric results together (or sum them) for each row. If **Average** is used, Yellowfin will display the average metric value for each row. *See Aggregation for more information.*
Alias	This allows a view administrator to provide a table with a new name during the first step of the View Building process. Aliases are often used when multiple copies of a table are used in the one view. *See Aliases for more information.*
Analytic Filters	These are User Prompt Glossary#Filters that are applied to all reports on a single Glossary#Dashboard Glossary#Tab. *See Analytic Setup for more information.*

Annotation	These are descriptions of an event attached to a date or date range and displayed on a report and/or chart. *See Report Annotation for more information*
Ascending	This is a sort option that moves from smallest/lowest to largest/highest value. This means that numeric values are sorted 0-9 and letters are sorted A-Z.
Average	This aggregation returns the average value of a metric, ignoring NULL values. *See Aggregation for more information*

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Term	Description
Broadcast	This is a method of distributing content. Email Broadcasts send emails to specified recipients that include a piece of content, such as a report. This is sent on a scheduled or once-off basis. *See Broadcasting Reports for more information*

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Term	Description
Calculated Field	This is a type of field that does not come directly from the database. It is created from a formula that may use database fields. *See Calculations for more information*
Category	These are folders that are used to group content. Views, Reports, and Fields all use categories, with Reports using a Category > Sub Category structure to group and assign security. *See Content Folders for more information*
Chart	A visual representation of data. Yellowfin has a wide range of chart types available. *See Charts for more information*
Client Organisations	Glossary#Yellowfin has functionality called Client Organisations which allows multiple virtual instances of Yellowfin to reside in the same server instance. This provides a way to create content isolated within one organisation, hidden from other organisation users logging into the same server. This is Yellowfin's Glossary#Multi-Tenancy solution. *See Client Organisations for more information.*
Cross Tab	This is a report output option that allows metrics to be aggregated by multiple categories, displayed as Row and Column headers. *See Table Layouts for more information.*
Co-Display	This function allows you to display multiple reports on the one Report Preview page. *See Co-Display Reports for more information*
Collaboration	This is when users work together to share insights into their data and the decision making process. Yellowfin provides features to assist the collaborative process including Comments, Discussions, and Annotations. *See Collaboration for more information.*
Comment	This is a note attached to a report in order to discuss its design or results. *See Comments and Tasks for more information.*
Conditional Formatting	This is formatting that is triggered when a condition is met. A rule is applied to a field in the report and special formatting, such as highlighting, is applied if the data matches the rule. Basic rules can also be applied to charts. *See Conditional Formatting for more information.*
Condition	This is a filter that limits the rows returned from a table, set at the view level. This filter cannot be seen or removed at the report level. *See Table Conditions for more information.*
Count	This aggregation returns the total number of records in a field in a report. *See Aggregation for more information*
Count Distinct	This aggregation returns the total number of unique records in a field in a report. This means that if a record is found twice, it will only be counted the first time. *See Aggregation for more information*

Cross Join	This method of linking two tables matches each row from the first table in the join to each row in the second table, multiplying the number of rows returned in the result. **Note:** this join should be used with extreme caution, as it's only appropriate in a handful of cases, and has negative effects on performance if used incorrectly. *See Joining Tables for more information on Yellowfin's use of Cross Joins, and this blog: Visual Explanation of SQL Joins for general join information.*
CRUD	Create, Read, Update, Delete. These options are used to define role permissions and relate to Glossary#SQL statements, allowing the user to create (INSERT records), read (SELECT records), update (UPDATE records), and delete (DELETE records). *See Roles for more information*
CSS	Cascading Style Sheet. This is a type of file used by Glossary#Yellowfin to define style options for the system that cannot be configured through Administration. Yellowfin's CSS files can be customised during the integration process. *See Custom Images & CSS for more information on customising CSS files for Yellowfin integration purposes, and http://www.w3schools.com/css/ for general CSS information.*
CSV	Comma Separated Values. These files store data in plain text form, with each value, or column, separated by a comma character. Glossary#Yellowfin allows you to import these files in order to report off their data. *See CSV Data Imports for more information.*

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Term	Description
Dashboard	This is a space to display multiple reports and charts in one place, allowing for interactive features to be used across them all at once. *See Dashboard Overview for more information*
Database	This is where the data for your reports is stored, called a Data Source within Glossary#Yellowfin. *See http://en.wikipedia.org/wiki/Database for more information*
Data Source	This is the database Glossary#Yellowfin retrieves results from. Administrators create a Source Connection in order to access the data. *See Managing a Data Source for more information*
Descending	This is a sort option that moves from largest/highest to smallest/lowest value. This means that numeric values are sorted 9-0 and letters are sorted Z-A.
Dimension	A standard field in Glossary#Yellowfin can either be classified as a **Metric** or **Dimension**. All text fields are automatically classified as Dimensions. The View Builder allows you to define numeric and date fields as Dimensions in order to be used in Drill Hierarchies, and limit the aggregations available to **Count** and **Count Distinct**. Dimension fields retrieve the data that will provide the basis for analysis in a report. Dimensions typically retrieve character-type data (employee names, company names, etc.), or dates (years, quarters, etc.) *See View Builder - Field Types for more information.*
Discussion	This is a stand-alone comment thread that allows users to discuss general topics and decisions while referring to multiple pieces of content if required. *See Discussion Streams for more information.*
Draft	Glossary#Yellowfin content can have two possible states: **Active** and **Draft**. If the piece of content is currently being created or edited by a user, then the report will be in **Draft** mode. This means that other end users will not be able to see or use the content until the editing process is completed by **Activating** the content.
Drill	Drill refers to the action performed by a user by clicking on a hyperlink in a report that either steps into more detail in the same report, or opens a separate detail report related to the row that was selected. There are three forms of **Drill** available in Glossary#Yellowfin; **Drill Down**, **Drill Anywhere**, and **Drill Through**. *See Dashboard Drill Analysis for more information.*
Drill Anywhere	This drill allows you to move up and down a hierarchy that is defined by the user during the drill process. *See Drill Anywhere Reports for more information.*
Drill Down	This drill allows you to move up and down a predefined hierarchy within a single report. *See Drill Down Reports for more information.*
Drill Through	This drill allows you to click on a row in a summary report and open a related detail report, filtered by what made the row in the summary report unique. *See Drill Through Reports for more information.*
Duplicate Records	These are rows with the same values across all columns in a result set. By default, Yellowfin applies **DISTINCT** to the SELECT Glossary#SQL statements it generates, meaning that duplicate rows are not displayed. This can be changed on the Report Data page of the Report Builder. *See Report Data for more information.*

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Term	Description
Embed	This is the inclusion of Reports, Charts, and Dashboards in an external webpage using the Javascript API. *See JavaScript API - old for more information*
Export	This is a function that takes something outside of the system. There are two types of export in Glossary#Yellowfin: 1. Export of Data - allows the user to save a piece of content, such as a Glossary#Report, Glossary#Chart, or Glossary#Dashboard, as a CSV, DOCX, PDF, or XLSX file. 2. Export of Content Definitions - allows the user to save an Glossary#XML file containing definitions of selected content in order to back it up or transfer it to another instance. *See Exporting Report Content, Exporting Your Dashboard, and Importing or Exporting Data for more information.*

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Term	Description
Field	This is a column in the database that will be used to build reports. Fields can be used as Columns/Rows, Sections, and Filters. They are defined either as Metrics or Dimensions. Calculations can also be created to use as fields, these are called Calculated Fields *See Prepare for more information*
Filter	These are fields that are being used to restrict the results returned in your report or dashboard. There are several types of filter in Yellowfin: 1. User Prompt - these filters allow the user to define the value used 2. Hard Coded - these filters have the value set at the report writing stage and cannot be changed by the report reader. 3. Source - these filters are created by an administrator and use the report reader's user details to restrict results to what's relevant to them. *See Filters for more information*

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Term	Description
GIS Map	GIS (Geographic Information System) Maps in Glossary#Yellowfin refer to several chart types that make use of geographical information, in the form of Points or Polygons. *See GIS Map for more information.*
GIS Point	Points are sets of latitude and longitude values used to define geographical locations. Examples of points include the location of customers, staff, and other points of interest. Glossary#Yellowfin uses points in GIS Mapping. *See GIS Map for more information.*
GIS Polygon	Polygons are sets of Points used to define a geographical shape. Examples of polygon shapes include the outlines of countries, states, territories, and regions. Glossary#Yellowfin uses polygons in GIS Mapping. *See GIS Map for more information.*

Granularity	The level of detail in the data. Described as **coarse** through to **fine**. The finer the granularity, the more detail and less summarised the data is. Aggregation is used to summarise data. *See Common View & Join Design Issues for more information.*
Gridlines	These are the dashed lines displayed across the chart's plot background by default on charts with an x & y axis. *See Gridlines for more information.*
Grid bands	This is the alternating shading displayed with gridlines across the chart's plot background by default on charts with an x & y axis. *See Gridlines for more information.*
Group	This is a list of users that is created in Glossary#Yellowfin to assign content and security to. *See User Groups for more information*

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Term	Description
Hard Coded	This refers to when a value is entered and set, rather than allowing a user to change it. In Glossary#Yellowfin a report writer can hard code filter values, or values in calculated fields. This means that the user is not prompted to provide a value, rather it is always the value the report writer set. The alternative in these cases is to implement user prompt filters, or use parameters in their calculations. *See Filters for more information*
HEX	Hexadecimal (Hex) is a base 16 number system, using symbols 0-9, A, B, C, D, E, and F to represent values 0 to 15. HTML and CSS use Hex to identify colours by assigning to digits to each colour; 2 x Red, 2 x Green, and 2 x Blue respectively, and prefixed with a hash (#) symbol. Glossary#Yellowfin uses Hex codes to identify colours throughout the system, as well as in its Glossary#CSS files. *See http://www.w3schools.com/html/html_colors.asp for more information.*
Hidden	This is a report that has been set to not display in the Report List. Generally heavily detailed reports that are used as children in a drill through relationship are hidden, as they are designed to be accessed through the parent report, not on their own. *See Report Formatting for more information.*
HTML	HyperText Markup Language. HTML is a markup language, like Glossary#XML, that was designed to display data in a web browser, used by Glossary#Yellowfin in combination with Glossary#CSS. *See Custom Header & Footer for more information on Yellowfin use of custom HTML files, and http://www.w3schools.com/html/ for general HTML information.*

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Term	Description
Import	This is a function that allows you to add something to the system from an external file. There are two types of import in Glossary#Yellowfin: 1. Import of Data - allows the user or administrator to import Glossary#CSV files containing data they wish to report off. This can be done at the Glossary#View or Glossary#Report level. 2. Import of Content Definitions - allows the user to transfer a set of Yellowfin content into a system using an Glossary#XML file, either to restore old content, or transfer content from another instance. *See CSV Data Imports and Importing or Exporting Data for more information.*
Inner Join	This is a type of link, or join between two tables based on a specified join condition. Only rows that match the condition in both tables will be returned. *See Joining Tables for more information on Yellowfin's use of Inner Joins, and this blog: Visual Explanation of SQL Joins for general join information.*
Instance	This is a single installation of Glossary#Yellowfin running. Some systems may have multiple instances of Yellowfin running. In this case there is often a development instance, testing instance, and production instance. There may also be multiple instances for different production purposes, depending on requirements.

Integration	This is the process of combining Yellowfin with an existing OEM system to create a system that feels seamless to the end user. *See Integration - OLD for more information*
Interface	This is what the user interacts with. The Glossary#Yellowfin interface is viewed through a web browser and contains all navigation and content.

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Term	Description
Join	A Join is an Glossary#SQL term that describes the logic around joining multiple tables together in order to return results from both tables. *See Joining Tables for more information for more information on Yellowfin's use of Joins, and this blog: Visual Explanation of SQL Joins for general join information.*
Javascript API	This is what allows Glossary#Yellowfin content to be embedded in external web pages. There is basic and advanced usage options. End users can access the basic functionality through the Yellowfin interface by copying the generated embed javascript and pasting it in their external page. Advanced users and administrators can access the advanced functionality by following the examples outlined here. *See JavaScript API - old for more information.*

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Term	Description
KPI	Key Performance Indicator. This is a figure used to monitor business performance, such as sales in dollars or units. Performance is tracked against a target and makes use of Conditional Formatting alerts. *See KPI Reports for more information.*

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Term	Description
LDAP	Lightweight Directory Access Protocol. This is a way that Glossary#Yellowfin can access directory information for Glossary#User authentication and Glossary#Group management purposes. This allows Yellowfin access to be controlled externally organisation-wide. *See LDAP Authentication for more information.*
Legend	This is a key that displays values used in a chart or report. In a chart it displays what value is assigned to each colour. In a report it can display the filter values applied, as well as any conditional formatting rules defined. *See Chart Legends, Filter Legends, and Conditional Formatting Legends for more information*
Line Shapes	These are shapes added to line charts in order to draw attention to each point of data. *See Line Shapes for more information.*

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Term	Description
Max	This aggregation returns the largest value found in the field. *See Aggregation for more information*

Mandatory	This is a field or filter that is required by a report in order to complete the building process or to return results. *See Mandatory Field/Filter and Filter Formatting for more information.*
Metadata	This is a piece of content's descriptive information. It generally contains the Name, Description, and Category details for a Field, Filter, Report, View, etc.
Metric	A standard field in Glossary#Yellowfin can either be classified as a **Metric** or **Dimension**. Numeric and Date fields are classified as Metrics by default, but can be changed to Dimension if required. Metric fields have the full range of aggregations available to them. They also have different functionality available to them when used as filters. Metrics do not allow for prompts, as there are generally too many possible values available, so they have slider options available in order to allow users to easily define ranges. Metric filter values cannot be cached. *See View Builder - Field Types for more information.*
Min	This aggregation returns the smallest value found in the field. *See Aggregation for more information*
Monochrome	This is a colour setting available to charts which, instead of using the default colours defined in Report Styles, the chart uses different shades of one colour selected by the user. *See Chart Formatting for more information.*
Multi-tenancy	This is when a single instance of software runs to serve multiple clients or tenants. Yellowfin's multi-tenancy functionality is called Client Organisations. *See Client Organisations for more information.*

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Term	Description
Navigation	This is the way in which users move around the Glossary#Yellowfin interface. There are various menus and buttons designed to move the user between pages and components of the system. *See Navigation for more information*
NULL	This is used to indicate a lack of data, or gap. Glossary#Yellowfin generally displays these as blank with a 'NULL' tooltip when returned in a report.
Numeric	This is a field or value composed solely of numbers (0-9), without the inclusion of any alphabetic or special characters.

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Term	Description
OLAP	Online Analytical Processing.
Omit	This option is used when a Report Reader does not specify a value for a filter. This option is not available for mandatory filters. *See Filter Formatting for more information.*
Org Ref Code	Organisation Reference Code. This is old terminology no longer used for reference codes. Some areas of the Yellowfin backend may still use this term, but the Yellowfin front-end has retired the phrase.
Outer Join	This is a type of link, or join between two tables based on a specified join condition. In Glossary#Yellowfin, the outer joins used are what's called Left Outer Joins. This means that all rows from the first table (or the left side) in the join will be included, and only rows have matches to these will be included from the second table (or the right side). *See Joining Tables for more information on Yellowfin's use of Outer Joins, and this blog: Visual Explanation of SQL Joins for general join information.*

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Term	Description
Parameter	Parameters are a type of user input field in Glossary#Yellowfin. They are designed to pass a value input by the user to a calculated field or filter(s). This allows you create What If reports. *See Parameters for more information.*
Plot	This is the area of the chart bound by the axes. It does not include the title and legend areas. *See Plot for more information.*
Portlet	This is the space that contains a report on a dashboard tab. *See Report Portlet for more information.*
Prefix	This is a symbol or character displayed before a value in a field. A common prefix to use is **$**. Prefixes can be defined at the view, report, and chart level.
Private	This is a piece of content that has access restrictions applied directly to it. Depending on the type of content, different restrictions can be applied: • Glossary#Dashboard - private dashboard tabs can only be accessed by the user that created the tab. • Glossary#Report - private reports can only be accessed by the user that created the report. • Glossary#Comment - private comments can only be accessed by users that have been assigned permission to see both the report and the comment. • Glossary#Annotation - private annotations can only be accessed by users that have been assigned permission to see both the annotation and the report/view/comment they're attached to. • Glossary#Discussion - private discussions can only be accessed by users that have been assigned permission to see the discussion area and the thread itself.
Public	This is a piece of content that may or may not have access restrictions directly applied to it, but generally designed for a far broader audience than that of private content. Depending on the type of content, different restrictions may be applied: • Glossary#Dashboard - public dashboards can be set to **Secure** or **Unsecure**. Secure dashboards have a list of users with various levels of access. Unsecure dashboards can be accessed by any dashboard user. • Glossary#Report - public reports can be accessed by any user that has permission to see the category/sub category it's stored in. • Glossary#Comment - public comments can be accessed by any user that has permission to see the report they're attached to. • Glossary#Annotation - public annotations can be accessed by any user that has permission to see the report/view/org they're attached to. • Glossary#Discussion - public discussions can be accessed by any user that has permission to see the discussion area.

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Term	Description
Query	This is the Glossary#SQL request that Glossary#Yellowfin generates and sends to the database. It defines what results are required for the report.

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Term	Description
Raster Map	This is an image based heat map created in Glossary#Yellowfin. The map itself is based on a raster image (created with pixels, rather than a vector image created with shapes). Yellowfin links a unique Glossary#HEX code colour to a piece of data in the source database in order to create the heat map, using Org Ref Codes. GIF, JPEG, and PNG raster image files are accepted. *See Raster Maps for more information.*

Reference Code (or Ref Code)	Reference Code. A reference code provides a means of mapping data values from the database to more reader-friendly descriptions. For example, a database with a field for Y and N could be mapped to new values of Yes and No for easier reading. Reference codes can also be used to assign custom sort orders, colors and images, as well as translations in (in multi-language deployments only) *See Reference Codes for more information.*
Related Report	Glossary#Yellowfin allows relationships to be created between reports. Related Reports either take the form of Drill Through or Glossary#Co-Display. *See Related Reports for more information*
Report	This is the result of an Glossary#SQL query displayed in Glossary#Yellowfin. The display can take the form of a table and/or chart. *See Reports Overview for more information*
Report Writer	This is a user that is responsible for creating the report and chart content in the system.
Role	A set of permissions and functions designed to be assigned to Users of the system. Different roles should be created for different types of user, with Glossary#Yellowfin providing a set of sample roles with the initial installation. *See Roles for more information.*
Rollback	This allows the user to return to a previous version of content, such as a view. In order for a rollback to be available, the cloning edit method must have been used. *See View Management for more information*

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Term	Description
Scale	This is what controls the y axis of a chart, determining the first and last values, as well as the increments used. *See Chart Formatting for more information.*
Section	These allow you to break up a report into sub reports. The table and/or charts will be broken up so there is one per section, rather than one overall. *See Sections for more information*
Source Connection	This is a piece of content created by an administrator which defines the method of accessing the reporting data source. *See Managing a Data Source for more information*
Source Filter	These are filters applied to reports based on the user running the report. This means that a user will only ever see the data that is assigned to them through the Source Filter. *See Restricting Data with Access Filters for more information.*
SQL	Structured Query Language. This is the language Glossary#Yellowfin uses to retrieve results from the database, returned as results in table and/or chart. *See http://www.w3schools.com/sql/ for more general SQL information.*
Sub Category	These are folders that reside within report categories and contain reports. Security is applied at this level in order to restrict access and functions available. *See Content Folders for more information*
Suffix	This is a symbol or character displayed after a value in a field. A common prefix to use is **%**. Suffixes can be defined at the view, report, and chart level.
Sum	This aggregation adds all of the field values and returns the total. *See Aggregation for more information*
Super User	A Yellowfin super user can view and delete content across the board, overriding any other config settings related to viewing and managing content. This includes the XML export of private content. Therefore, any user roles given this function have full access to all content, whether private or public, within an organization.

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Term	Description

Tag	These are used to index content to aid in searches.

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Term	Description
User	This is an account created in order to allow a person to access the Glossary#Yellowfin system. *See Users for more information*
User Prompt	This is a type of filter that requires users to provide one or more values to restrict report results. *See Filters for more information*

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Term	Description
View	This is a metadata layer created by an administrator that sits between the source connection and Report Builder that defines the fields available to report writers and the join logic required to generate Glossary#SQL queries. *See Views Overview for more information*
Virtual Table	These are a View component that allows an administrator to enter an Glossary#SQL query and treat the results as a table in the view. *See Virtual Tables for more information*

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Term	Description
Web Service	Web Services are used for managing communication between an OEM application and Glossary#Yellowfin. The Web Services are Glossary#XML based and independent of the programming language used to develop the OEM application.
What If	What If Analysis is a method of creating reports that make use of Parameters and Calculated Fields in order to test scenarios. *See What if Analysis for more information.*
WMS	Web Map Service. A WMS layer is a georeferenced map image loaded from a WMS Server. These are used as backgrounds and overlays for GIS Maps in Glossary#Yellowfin. *See WMS Layers for more information.*

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Term	Description
XML	Extensible Markup Language. XML is a markup language, like Glossary#HTML, that was designed as a way transporting data, where HTML designs ways to display it. Glossary#Yellowfin uses this language to create export files that transport report and other content definitions. *See Importing or Exporting Data for more information*

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Term	Description
Yellowfin	Yellowfin is an easy-to-use report writer for non-technical users, delivering drag-and-drop simplicity for formatting and data selection. With Yellowfin, you can access information from multiple data bases without special coding knowledge. This is easy because you work with data in business terms that are familiar to you without the need to understand complex technology principles. *See http://www.yellowfinbi.com/ for more information.*

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Term	Description
Z Chart	This is a type of chart that displays trends over a specified period of time in the form of straight values, accumulative total, and moving total. *See Z Charts for more information*

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