Prepare

Overview

Once a view has been defined either through the View Builder, SQL clause or straight from the database you will need to define the field definitions and apply business metadata to them.
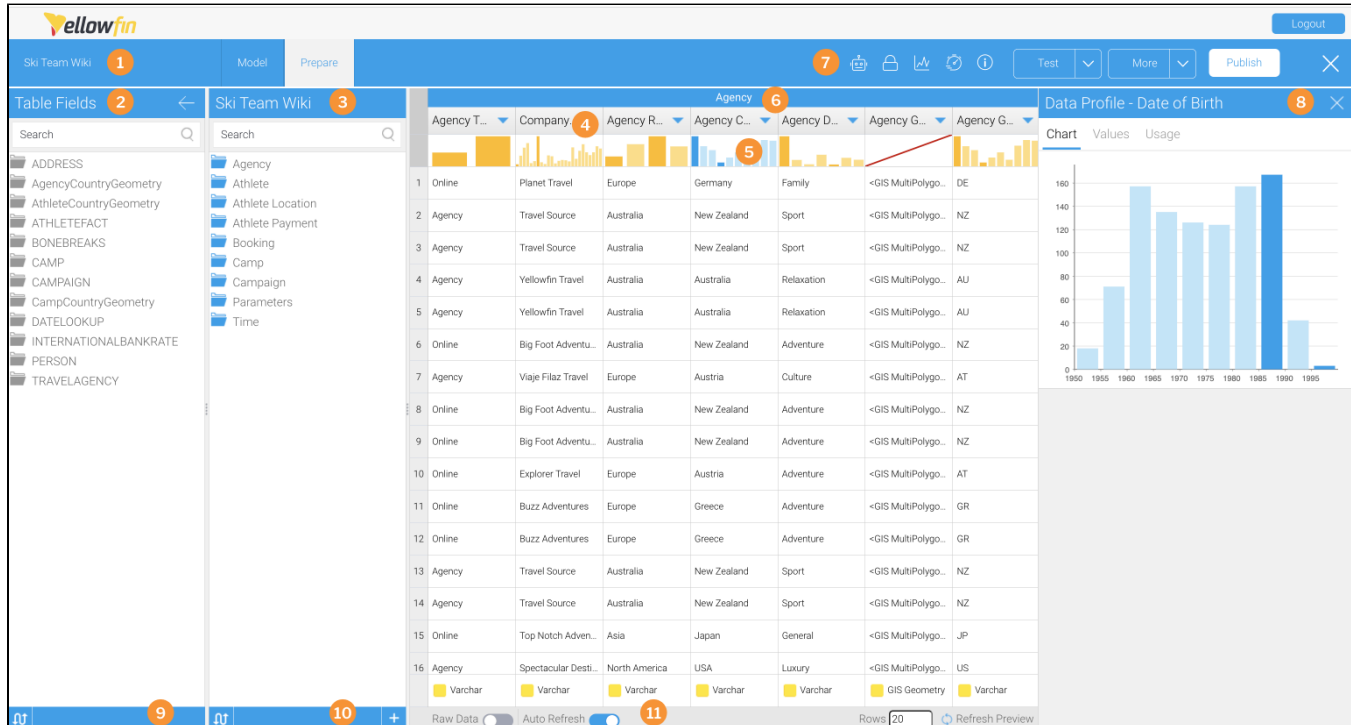
1. **View name**: The view name displayed here can be edited by double-clicking on the text.
2. **Table Fields column**: This column won't appear by default, but is easy to access (via the **Create** tool ![+] — see item 10 in this list). Each field originally selected will initially be unattached. The process of adding fields to the view requires that metadata be applied. Drag fields from the Table Fields column to the folders in the View Fields column to place them appropriately for your view.
3. **View Fields column**: Fields are grouped into folders. This helps end users find the fields they require, and lets you group fields according to business logic instead of database logic. Fields displayed in the list provide some indication of their metadata, such as; hierarchies, dimensions or metrics, and business name.
4. **Field Name column**: Each time you add a field to the View Fields column, it will be added as a Field Name column here, along with some sample data below it. Click on the field name to rename it.
5. **Profiling bar**: The profiling bar displays a histogram of the data profiling result. Clicking on this will open the data profile panel on the right of the screen. See Data Profiling for more information.
6. **Folder bar**: The blue heading bar displays the name of the field folder the fields are grouped into.
7. **View toolbar**: The view toolbar contains additional settings via tools for full control over view access, automation and more (see the section below called Navigate the view toolbar).
8. **Data Profile panel**: The Data Profile panel shows a full breakdown of the profiling applied to the selected field. See Data Profiling for more information.
9. **Toggle tool** ![toggle]: Clicking on this tool lets you toggle the display of field and table names between database names and business names.
10. **Create tool** ![+]: Clicking on this tool to display a menu with a number of field-related options to choose from (see the section below called Navigate the Create tool).
11. **Preview options bar**: The options on this bar let you control how to preview data on the Prepare step. Note that this does not mean these changes are saved. The options are:

    - **Raw Data toggle:** If toggled on, this displays the data as it would have been returned from the database. If toggled off, data is displayed with any additional formatting applied within the view.
    - **Auto Refresh toggle:** Toggle this on to automatically refresh the preview panel as changes are made to the view set up, such as adding or removing columns.

- **Rows field:** Type the number of rows to be previewed into this text field.
- **Refresh Preview link:** If auto refresh is disabled, click on this to refresh the view data manually.

Navigate the view toolbar

The toolbar at the top of the screen contains access to a variety of settings that you should explore before publishing your view. See the table below for further information about each item on the toolbar

Tool	Name	Description
	Automation Settings	This tool opens the Automation Settings dialog box, where you can set all automation options around Guided NLQ, Assisted Insights and Yellowfin Signals. See The View Automation Settings wiki page for full details.
	View Security	This tool opens the View Security dialog box, where you can restrict or open access to views and their fields. See the View Security Settings wiki page for full details.
	Data Profiling	This tool opens the Data Profiling dialog box, where you can optimize your view for faster interactions. See the Data Profiling wiki page for full details.
	Performance	This tool opens the Performance Settings dialog box, where you can further improve performance through enabling and disabling functionality such as duplicate record display and caching. See the View Performance Settings wiki page for full details.
	View Info	This tool opens the View Summary dialog box, which displays useful information such as the generated SQL for your view and which reports are currently using the view and the option. See the View Summary wiki page for full details.
Test	Test	This dropdown provides a means for testing your view before publishing. Click on the Report from the dropdown to go to the Report Builder, where you can build a report to check the fields in your view are working as expected. When you've finished testing, you can return to the View Builder from a dedicated link in the Report Builder.
More	More	This dropdown provides an additional access point for copying or deleting your view. You may also perform these tasks from the Browse window.
Publish	Publish	This button is exactly that: once you've clicked on it, your view will be published and visible to anyone who has access to see it.
	Close	This tool closes the View Builder without publishing the view. Note that the View builder saves with each change you make, so there is no need to save before closing a view that you're working on.

Navigate the Create tool

The Create tool contains a number of options relating to field characteristics such as formats, field calculations and more. See the table below for more information.

Menu option	Description
Add Fields	This expands the Table Fields panel, where you can add new fields to the view. See Add Fields below for more information
Add/Edit Folders	This opens the Field Folders dialog box, where you can adjust the folders used to group fields in the view. See Add/Edit Folders for more information.
Calculated Field	This opens the Calculated Field dialog box, where you can build a calculation to be included in the view. See Calculated Fields for more information.
Calculated Filter	This opens the Calculated Filter dialog box, where you can build a filter to be included in the view. See Calculated Filters for more information.
Parameter	This opens the Parameter dialog box, where you can define a parameter to be included in the view. See Parameters for more information.
Grouped Data	This opens the Group Data dialog box, where you can define a field made up of groups of values based on another field, to be included in the view. See Grouped Data (Report) for more information.
Data Function	This opens the Date Function dialog box, where you can create a new calculated field based on a date field, to be included in the view. See Date Functions for more information.
Filter Group	This opens the Filter Group dialog box, where you can create a group of filters to be included as a set in the view. See Filter Groups for more information.

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Add Fields

A major process of setting up a new view and creating meta data is column definition. Using Yellowfin you can give columns sourced from your database business terminology or create new columns derived from data included in the view. This section includes information on managing and updating the columns included in your view.

Making Fields Available for Reporting

Unattached fields are grouped into their source table folders in the Unattached Field list. Click on the field name and drag it into the appropriate folder.

Note: You can add the same field multiple times into your view. This is useful if you wish to use the same field in multiple hierarchies or with different formatting applied.

If you do add the same field multiple times, ensure that the business descriptions are unique, since Yellowfin needs to differentiate the fields during import and export processes.

Drag Fields into Folders

Fields Added

Removing Fields

Fields can be removed from the view by dragging them from a folder into and area that doesn't accept fields. You will know your fields are about to be removed as an orange message is displayed below them.

Drag Fields Out of Folders

Fields Removed

Removing Fields

The selected fields will be removed from the view permanently
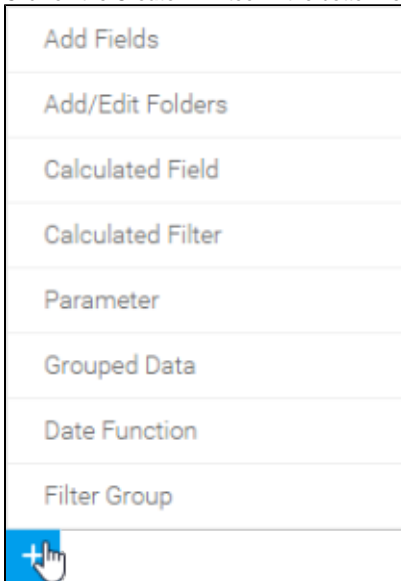
Field Folders

Fields are categorized to help business users better understand the context of the field that they are adding to a report. Categorization lets you, for example, group columns into particular subject areas.
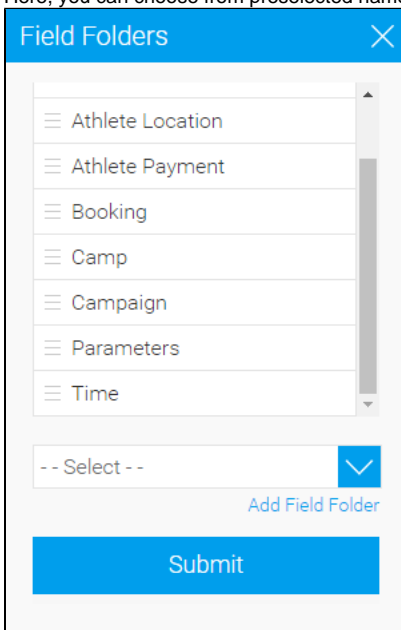
Add/Edit Folders

You can add existing folders into the view or create brand new ones. You can also move folders around using this dialog box.

In the following steps, make sure you have loaded Yellowfin and have enough access to edit a view. Make sure it's a test view, such as one you've already copied, to avoid any accidental changes that might affect dependent content.

1. Open a view in the View Builder and click on the **Prepare** tab
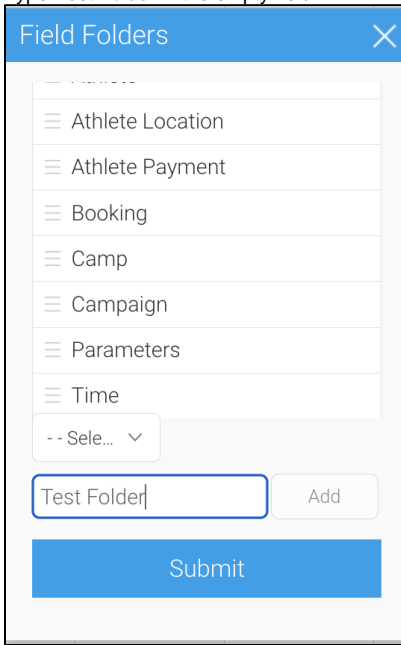2. Click on the **Create** [+] tool in the bottom left of the screen to display a menu

3. Select the **Add/Edit Folders** menu option to display the **Field Folders** dialog box
   Here, you can choose from preselected names for field types from the dropdown menu, or manually add your own, which is what we'll do
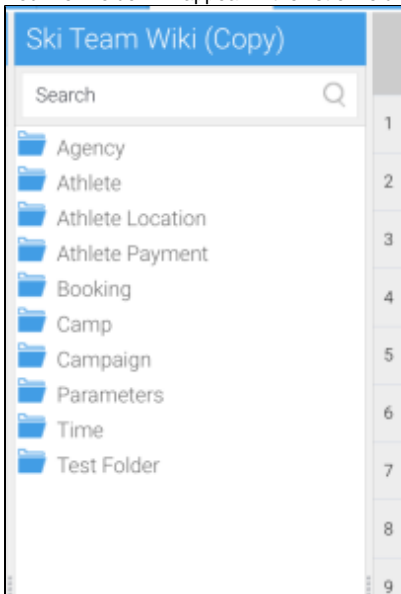

4. Click on the **Add Field Folder** link

5. Type *Test Folder* in the empty field

Field Folders ✕

≡ Athlete Location

≡ Athlete Payment

≡ Booking

≡ Camp

≡ Campaign

≡ Parameters

≡ Time

- - Sele... ∨

Test Folder | Add

Submit

6. Click on the **Add** button to add the new folder to the bottom of the list of field folders

7. Scroll down the list to see your new folder and hover over its burger bun ≡
8. Drag **Test Folder** up one or two folders in the list and release it

9. Click on the red cross ✗ to delete **Test Folder**
10. Repeat the steps above to once again add a folder called **Test Folder**
11. Click on the **Submit** button to close the dialog box
    Your new folder will appear in the list of field folders

Ski Team Wiki (Copy)

Search 🔍

| 1 |
📁 Agency
📁 Athlete | 2 |
📁 Athlete Location
📁 Athlete Payment | 3 |
📁 Booking | 4 |
📁 Camp
📁 Campaign | 5 |
📁 Parameters | 6 |
📁 Time
📁 Test Folder | 7 |
| 8 |
| 9 |

You can now drag table fields into your test folder

Field Display Order

You can modify the display order of fields for the Report Builder from the View Builder. Do to so, in the View Builder, click on a field and drag it above or below the other fields, or to a different folder.
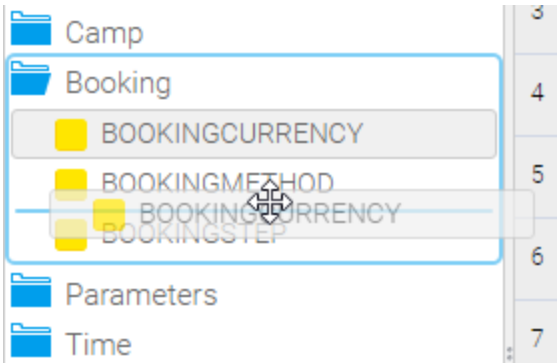
Note: If you are moving a field below a hierarchy of fields then a single move up or down will move the field past the entire hierarchy, not just a single field.

Navigate the field dropdown menu

Each field in the view has a dropdown menu with access to a range of options related to it. This menu can be accessed via two methods:

Table Fields	Data Preview

The options available will depend on the type of field that has been selected. Options you may see are listed in the table below.

Option	Description

Field Type	This displays the type of field as an icon (**Dimension**, 🔵 **Metric**, 📅 **Date**), with the exception of metric fields, which let you change the field to a dimension if required.
Default Aggregation	This lets you choose the default aggregation type for a field when it is added to the Data step of the Report Builder.
Drill To	This lets you decide how the field interacts as part of a hierarchy. See Drill Down Hierarchies for more information.
Rename	This lets you change the business name of a field, which is how it is displayed by default in the Report Builder.
Edit Format	This lets you open the Field Settings menu, giving you access to the default formatting options for the field. See Field Settings for more information.
Edit Calculation	If the field is a calculated field, this option is displayed and gives you access to edit the calculation the field is based on. See Calculated Fields for more information.
Edit Filter Calculation	If the field is a calculated filter, this option is displayed and gives you access to edit the calculation the filter is based on. See Calculated Filters for more information.
Edit Grouped Data	If the field is a grouped field, this option is displayed and gives you access to edit the groupings the field is based on. See Grouped Data (Report) for more information.
New Grouped Data Field	This lets you create a new grouped field based on the data of the currently-selected field. See Grouped Data (Report) for more information.
Configure Filter Group	If the field is a filter group container, this option is displayed and gives you access to edit settings applied to the group. See Filter Groups for more information.
Link to GeoPack	This lets you link the contents of a GeoPack to the selected field. See GeoPack Use for more information.
Profile	This lets you apply data profiling to the selected field. See Data Profiling for more information.
Convert	This lets you apply a converter to the field to transform it in some way. See Data Conversion for more information.
Copy	This lets you make a copy of the current field.
Delete	This lets you remove the current field from the view.

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