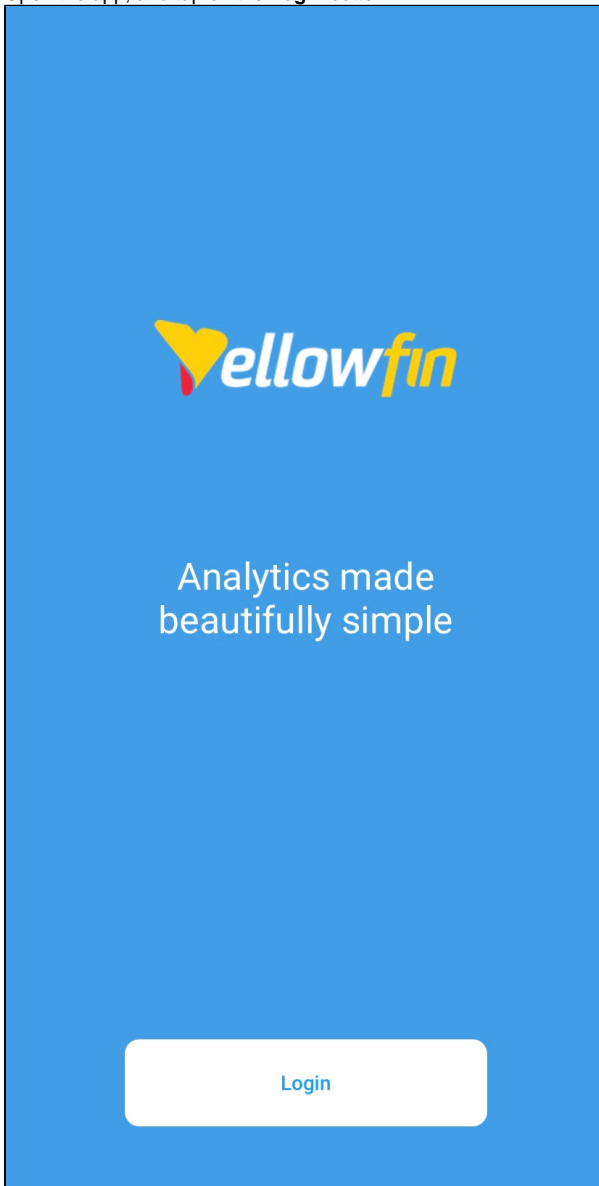# Mobile App Log In

Overview

Log into the Yellowfin mobile app by using:

- Your Yellowfin server login credentials.
- Your Yellowfin mobile onboarding invitation link (this method does not require login credentials).

Logging in with Yellowfin credentials

Use your Yellowfin server username and password to log in.

1. Open the app, and tap on the **Login** button

2. At the login screen, tap on **What is my server URL?**
   The Server URL is the address of the server where Yellowfin is deployed

A pop-up will appear, explaining how to obtain the correct URL if you are unsure

Login

Server URL (or address)

https://mobiledemo-au.yellowfin.bi

What is my server URL?

Cancel

Server URL (or address)

The address of your server, e.g. "http://myserver". Please contact your administrator if you do not know this address.

OK

Login

Try on our sample data

3. Tap **OK** to return to the login screen

Yellowfin

Cancel

Login

Server URL (or address)

What is my server URL?

Username

Password

Client Org (omit if one has not been provided)

Login

Try on our sample data

4. When at the login screen, specify your **Server URL**

Vellowfin

Cancel

Login

Server URL (or address)

https://mobiledemo-au.yellowfin.bi

What is my server URL?

Username

Password

Client Org (omit if one has not been provided)

Login

Try on our sample data

5. Enter your Yellowfin username and password
The username field is case-sensitive

yellowfin

Cancel

Login

Server URL (or address)

https://mobiledemo-au.yellowfin.bi

What is my server URL?

Username

zoe.ortiz

Password

●●●●●●

Client Org (omit if one has not been provided)

Login

Try on our sample data

To log into a specific client organization, provide the **Client Org** reference ID, otherwise leave this field empty

6. Tap on the **Login** button to continue

7. Choose a quick authentication method and tap the **Continue** button
   Available quick authentication options depend on your mobile device, and make sure your chosen quick authentication method is pre-configured

Yellowfin

Enable quick authentication on this device

Set up a PIN Number or use face authentication each time you open the app

Set up PIN

Enable Face ID

Continue

Skip

Tap **Skip** to setup later

Enable quick authentication on this device

Set up a PIN Number or use face authentication each time you open the app
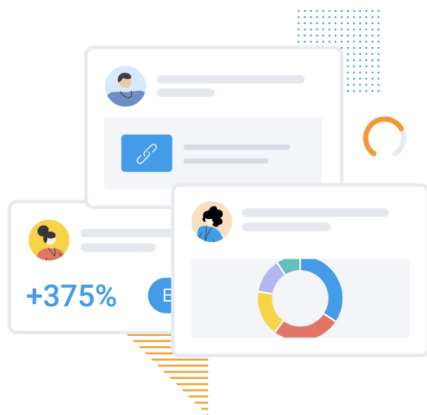
Set up PIN

Enable Face ID

Continue

Skip

8. Swipe left on each of the introductory pages, and tap **Got it!** on the last page
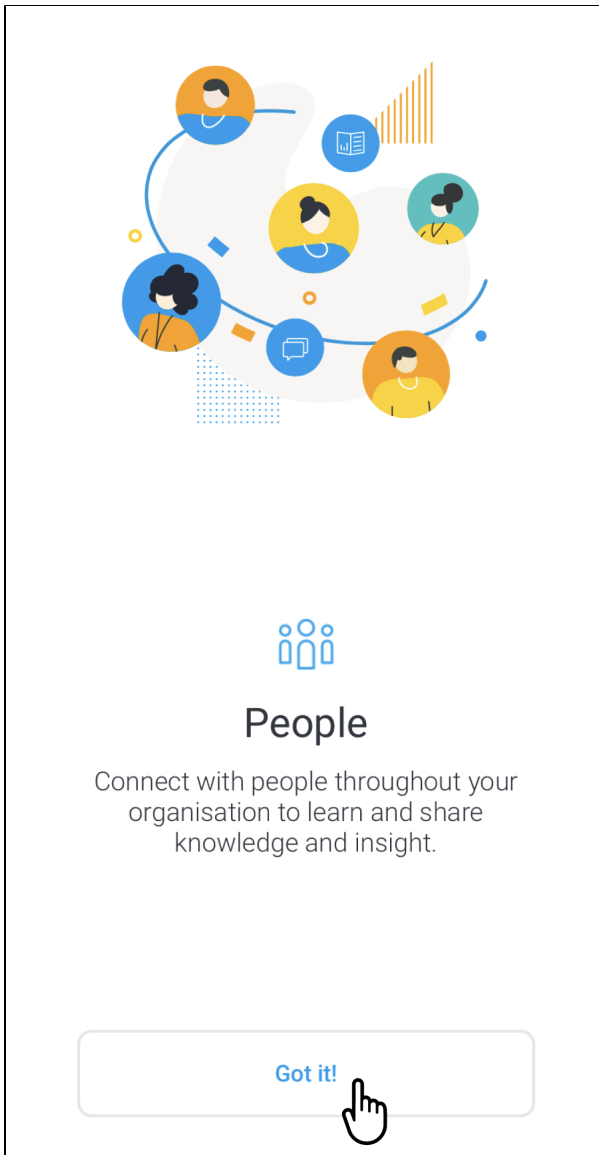

Timeline

Signals, updated reports, the latest Stories, discussions and updates all in one place.

Reports

Explore your data and discover patterns and outliers with all your reports at your fingertips.

9. Once logged in, Yellowfin mobile will display your Timeline

✅ The next time you log in, you will be taken straight to your Timeline.

Logging with a Yellowfin mobile onboarding invitation

The Yellowfin mobile onboarding invitation simplifies the login process by removing the requirement for login credentials. Users receive email invitations with a link, that when tapped, automatically opens the app on their instance of Yellowfin without the need for for login details, such as a username, password, server URL, or Client Org.

Sending invites

Yellowfin sends onboarding email invitations on behalf of:

- Admins to multiple or specific users, or
- Users to themselves (users must have the correct role function enabled)

### Issuing and revoking onboarding invitations - admin level

✅

Admins send invitations to users by following the steps below.

> ✅ **Tip**
>
> Before issuing onboarding invitations to users, make sure your email configuration has been set up in Yellowfin on your desktop computer. You will also need to define an external URL to access this instance by specifying your IP address (in the **External Instance Base URL** field under **General Settings**).

1. From a desktop computer, use a web browser to access Yellowfin
2. Click on the ☰ in the top left corner of the screen, then click on **Administration**
3. If required, scroll down the list of options, then click on **Mobile Access Management** to display the Mobile Access Management page
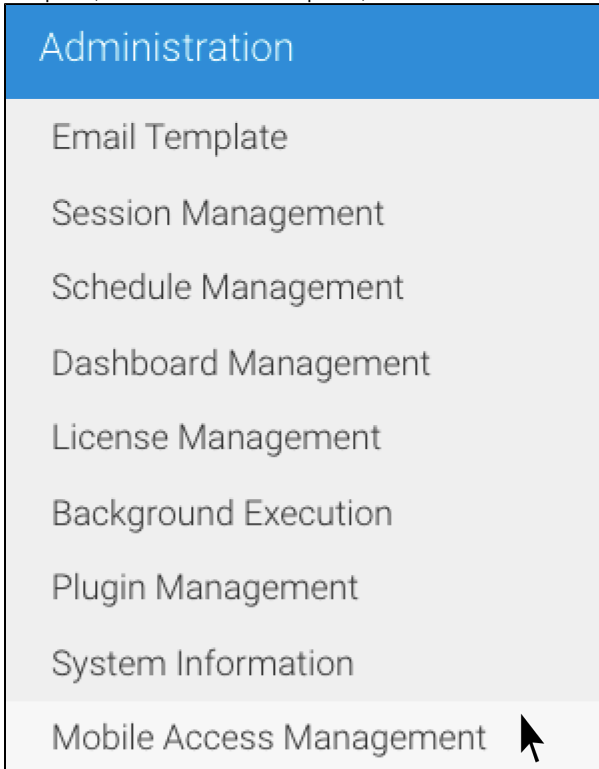
The Mobile Access Management page displays a list of invitees, allowing you to manage users' access to the mobile app
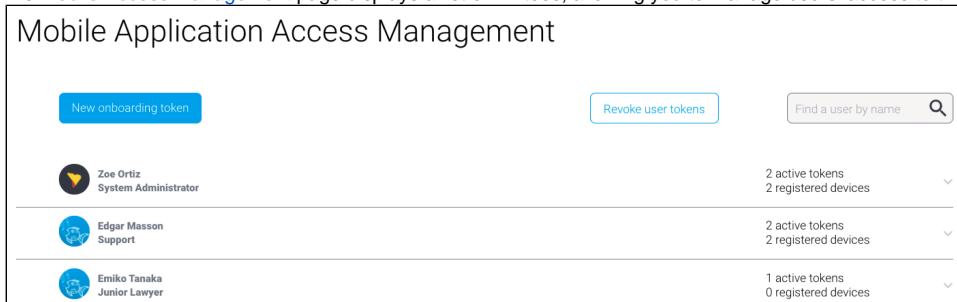
4. Click on the **New onboarding token** button.
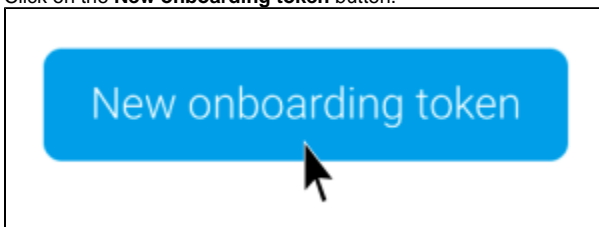
5. In the popup, add the users (or groups) you would like to invite
   If you wish to avoid sending duplicate invitations to users who have already received invitations (even if they haven't taken action), click on the **Disregard users who have already onboarded** check box

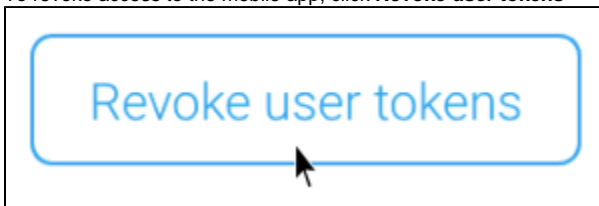**6.** Click on the **Send** button to send the invitations

The new users will be added to the **Mobile Application Access Management** page

Mobile Application Access Management

New onboarding token
Revoke user tokens
Find a user by name 🔍

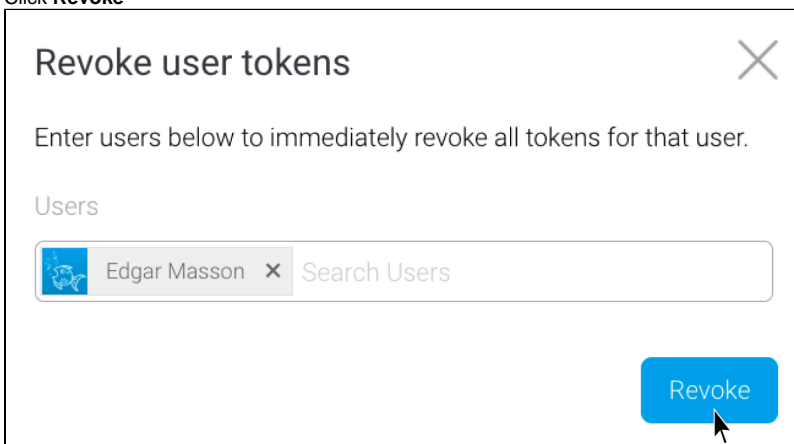|	
Zoe Ortiz System Administrator	2 active tokens 2 registered devices
Emiko Tanaka Junior Lawyer	1 active tokens 0 registered devices
Isaac Daniels Lawyer	1 active tokens 0 registered devices
Hazel Salinas Lawyer	1 active tokens 0 registered devices
Ed Fry Admin Support	1 active tokens 0 registered devices
April Hollands Sales Rep	1 active tokens 0 registered devices

7. To revoke access to the mobile app, click **Revoke user tokens**

Revoke user tokens

8. To revoke access for a user or users, type their name in the field and click the user from the dropdown list

Revoke user tokens ✕

Enter users below to immediately revoke all tokens for that user.

Users

edgar

Edgar Masson

evoke

People Only

9. Click **Revoke**

Revoke user tokens ✕

Enter users below to immediately revoke all tokens for that user.

Users

Edgar Masson ✕ Search Users
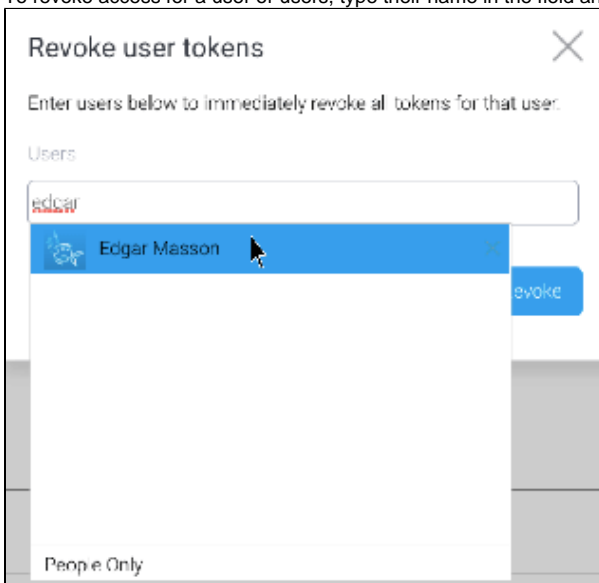
Revoke

10. The selected user will be removed from the **Mobile Application Access Management** page

Issuing and revoking onboarding invitations - user level

Users can send themselves an invitation to initiate the onboarding process for Yellowfin mobile. This process can be performed by any user (not specifically an admin), provided they have the **Mobile Self Invite** role function enabled.

> ⚠️ The **Mobile Self Invite** mobile role function must be enabled for this process. Your system administrator will be able to assist.

1. From your desktop computer, use a web browser to access Yellowfin

2. Click on the ☰ in the top left corner of the screen, then click on **Profile Settings**
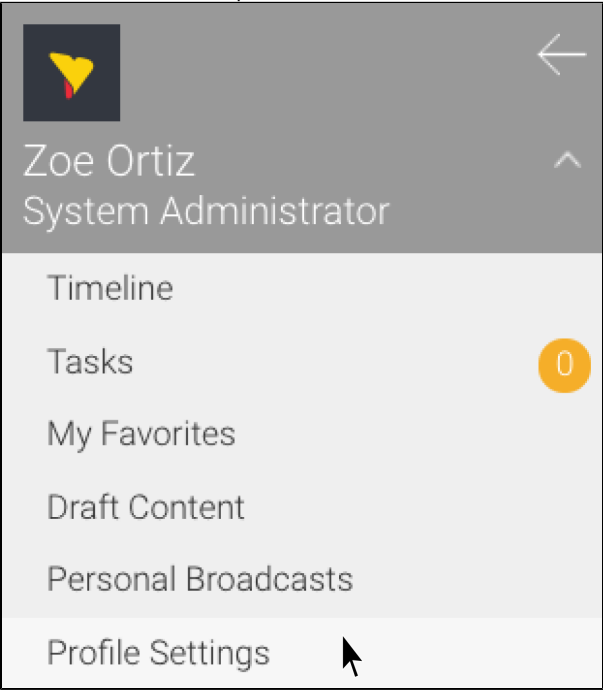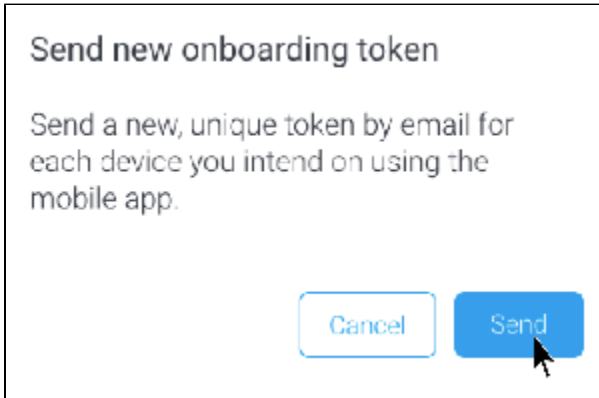

3. If required, scroll down the list of options and expand the **Mobile Access Management** section
   The Mobile Access Management page allows you to issue an onboarding token to your mobile device, and manage your deployed tokens

4. Click on the **New onboarding token** button
A confirmation message will appear
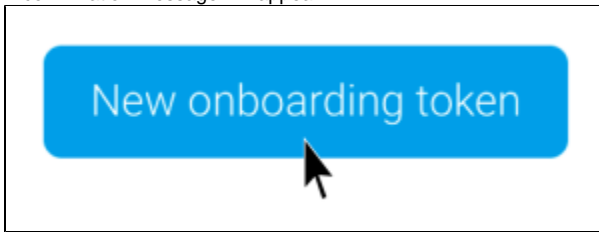
5. Click the **Send** button to confirm and send an invitation

A new token will be added to the **Mobile Access Management** section
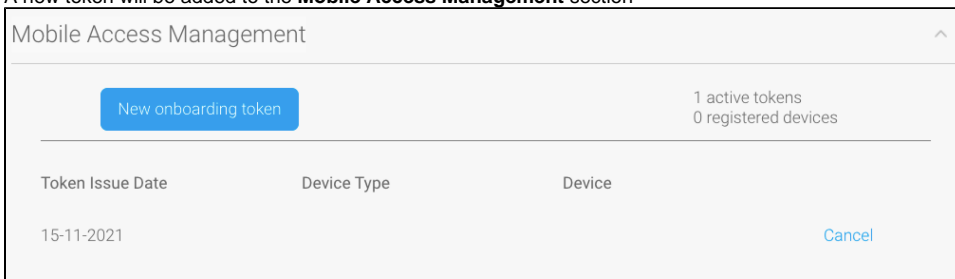
6. To revoke your mobile app onboarding token, click **Cancel** next to the token
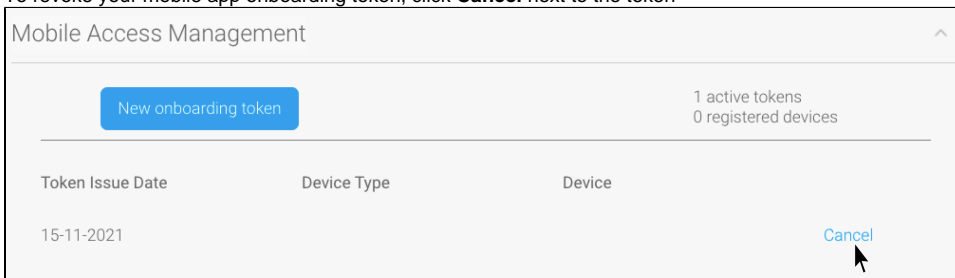
The token will be removed automatically

Logging in with an onboarding token

If you have received a Yellowfin onboarding token, follow the steps below to log into the app.

⚠ Make sure you have installed the Yellowfin mobile app prior to logging in.

1. Using your mobile device, access the invitation email you received
2. Tap on the **'click here to open and log in'** link within the email

App Onboarding
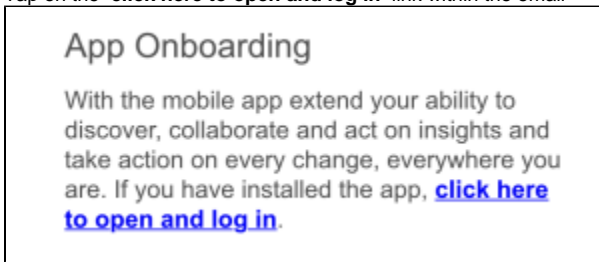
With the mobile app extend your ability to discover, collaborate and act on insights and take action on every change, everywhere you are. If you have installed the app, **click here to open and log in**.

3. The app will open on your device and automatically log you in

⚠️ Your preferred browser is opened first, before the app is launched. Depending on your security settings, a confirmation message might appear, seeking permission to launch the app.

⚠️ If you exit or switch to another app, you will remain logged in for 15 minutes before being logged out automatically

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Use Yellowfin's Sample Content

Yellowfin's sample data allows you to browse and interact with our library of Signals, Stories and Reports. You can trial the mobile app using Yellowfin's sample content by following these steps.

1. Tap on the **'Try on our sample data'** link at the bottom of the Login screen

Login

Try on our sample data
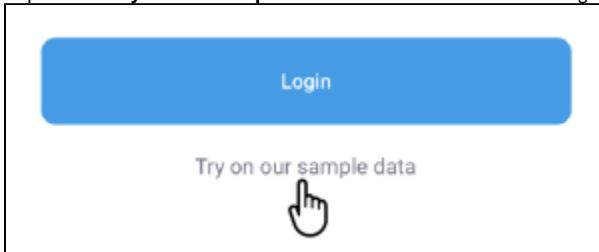
A form will appear

Yellowfin

Demo ☰

Take the new Yellowfin mobile app for a spin on our sample data

Register to receive your login now

First name

Last name

Company

Phone number

Business Email

What is your preferred region?

Select...

See it

2. Tap on each field of the form to enter your details

3. Tap on the **See it** button to submit your details
   You will receive an email containing the login details to access Yellowfin's sample data server from the app

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