

Mobile App Log In

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Overview

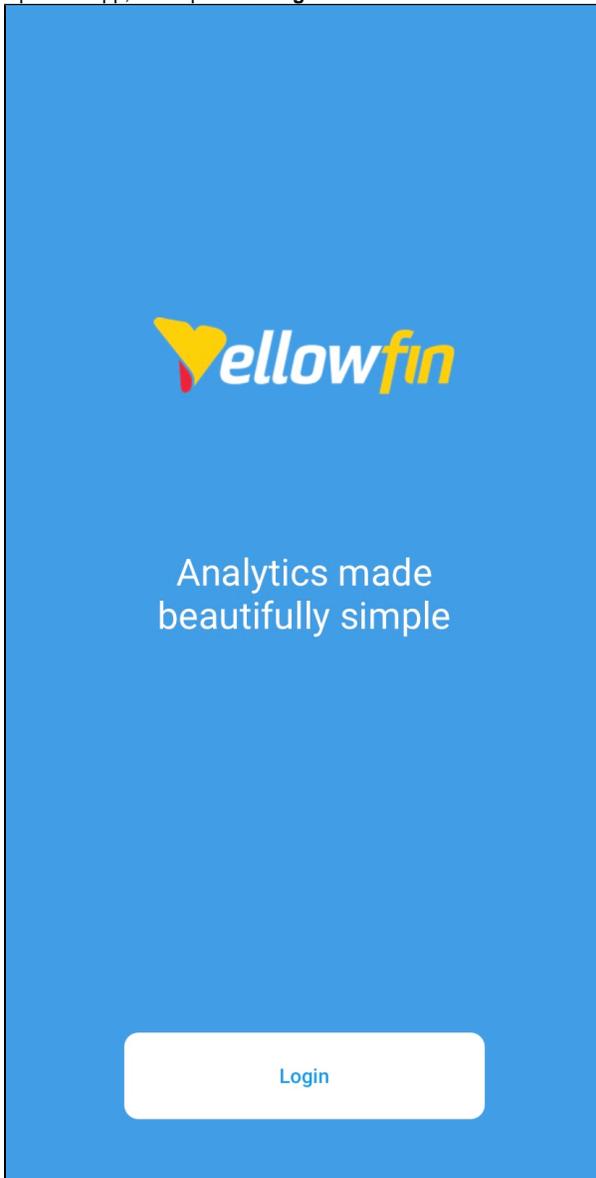
Log into the Yellowfin mobile app by using:

- 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



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

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



Cancel

Login

Server URL (or address)

https://mobiledemo-au.yellowfin.bi

What is my server URL?



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



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**

yellowfin 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



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

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

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



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

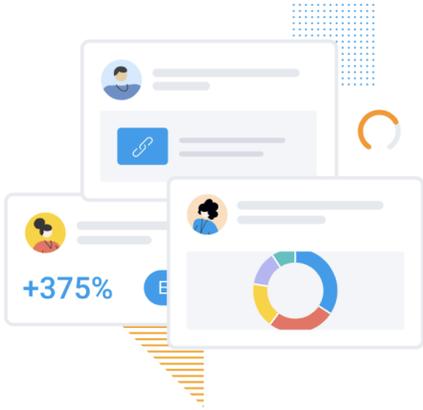
Enable Face ID

Continue

Skip



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



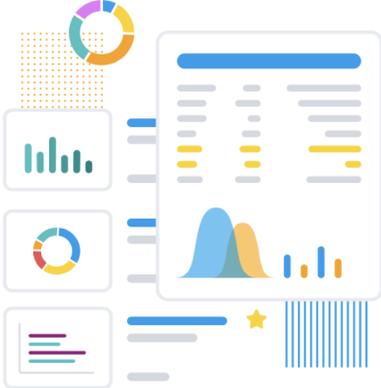
The illustration for the Timeline feature shows several overlapping cards. One card prominently displays a '+375%' increase. Other cards show profile icons, a link icon, and a donut chart. The background includes a grid of dots and a curved arrow.



Timeline

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

● ● ● ● ●



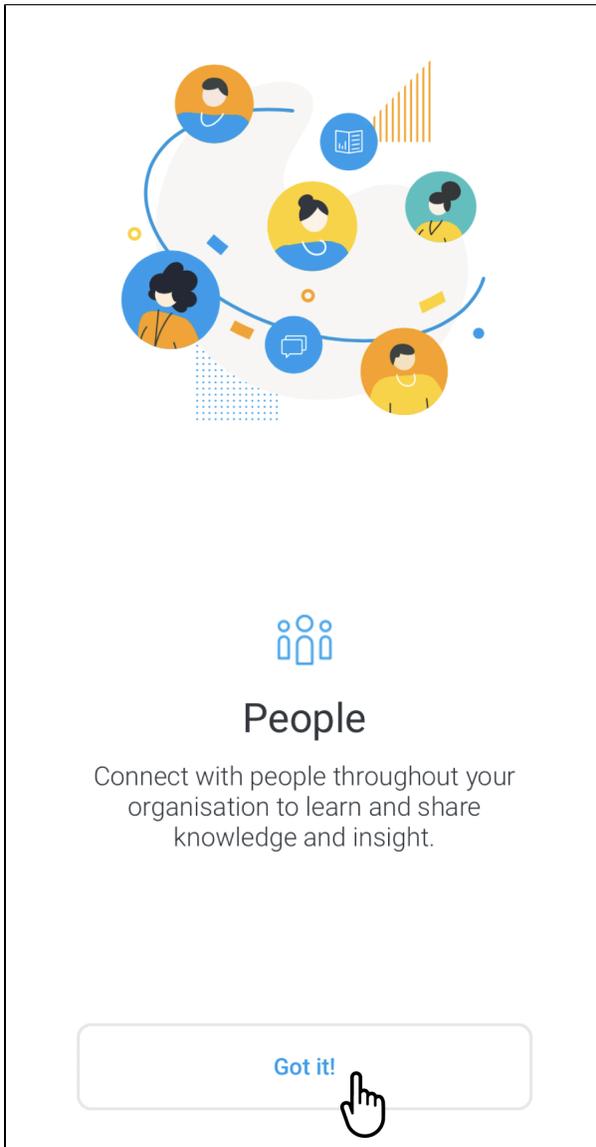
The illustration for the Reports feature shows a central dashboard with various data visualizations: a bar chart, a donut chart, a line graph, a pie chart, and a star icon. The background features a grid of dots and a bar chart.



Reports

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

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9. Once logged in, Yellowfin mobile will display your [Timeline](#)



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

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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 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)

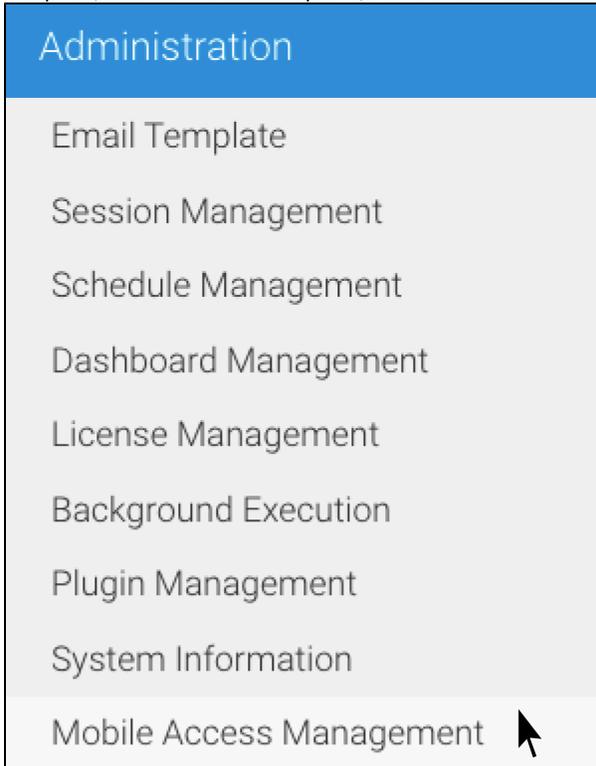
Issuing and revoking onboarding invitations - admin level

Admins send invitations to users by following the steps below.

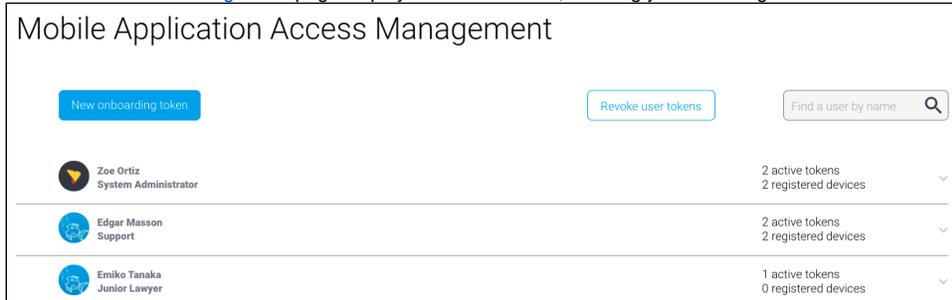
 **Tip**

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**).

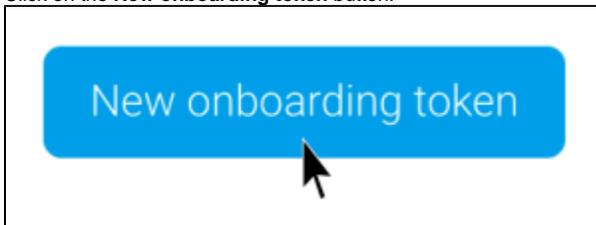
1. From a desktop computer, use a web browser to access Yellowfin
2. Click on the  in the top left corner of the screen, then click on **Administration**
3. If required, scroll down the list of options, then click on **Mobile Access Management** to display the [Mobile Access Management](#) page



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

Send new onboarding token ✕

Send a new, unique token in email to each of the following users. If needed, label groups of users to form mobile user groups.

To

< iac Daniels ✕ Hazel Salinas ✕ Search Users

Disregard users who have already onboarded

Message

Additional Message (Optional)

Send

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

Send new onboarding token ✕

Send a new, unique token in email to each of the following users. If needed, label groups of users to form mobile user groups.

To

< iac Daniels ✕ Hazel Salinas ✕ Search Users

Disregard users who have already onboarded

Message

Additional Message (Optional)

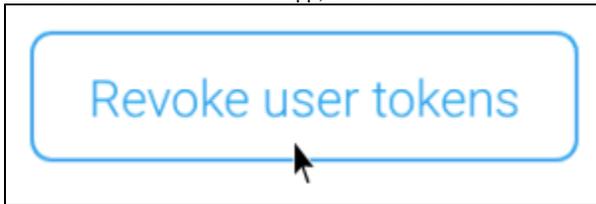
Send

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

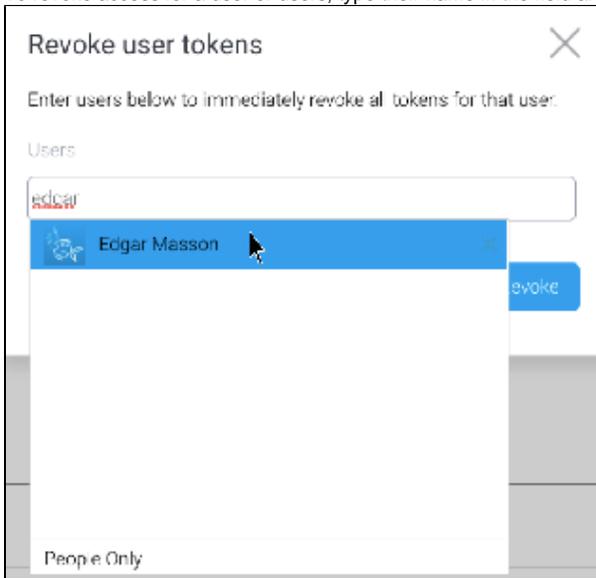
Mobile Application Access Management

| | | |
|--------------------------------------|---|--|
| New onboarding token | Revoke user tokens | <input type="text" value="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 | ▼ |

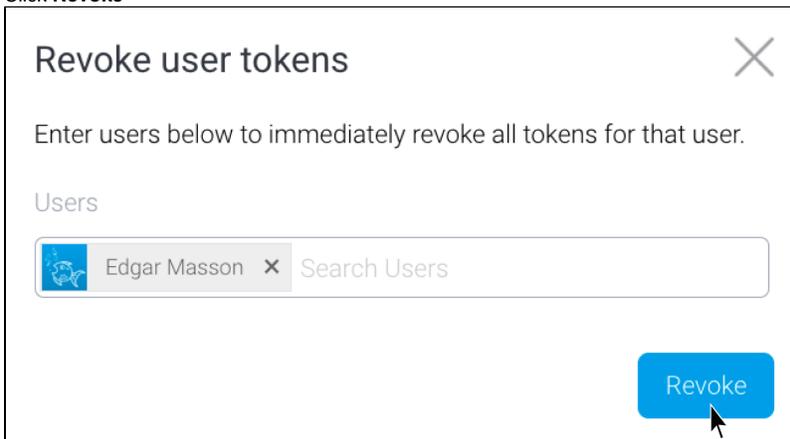
7. To revoke access to the mobile app, click **Revoke user tokens**



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



9. Click **Revoke**



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

| Mobile Application Access Management | |
|--------------------------------------|---|
| New onboarding token | Revoke user tokens <input type="text" value="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 |

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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.

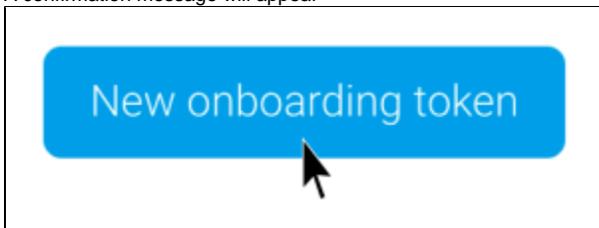
1. From your desktop computer, use a web browser to access Yellowfin
2. Click on the in the top left corner of the screen, then click on **Profile Settings**

The screenshot shows a mobile app interface for a user named Zoe Ortiz, System Administrator. A menu is open, listing options: Timeline, Tasks (with a 0 notification badge), My Favorites, Draft Content, Personal Broadcasts, and Profile Settings. A mouse cursor is pointing at the Profile Settings option.

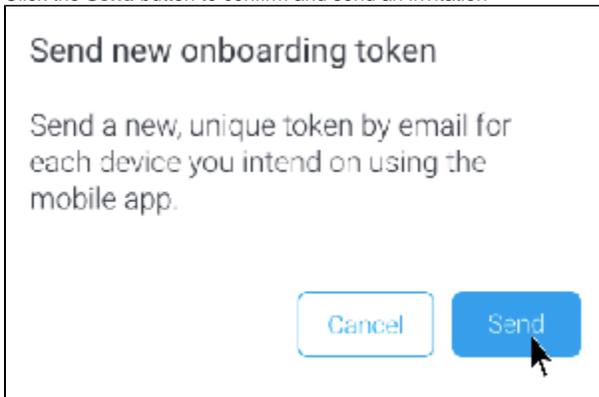
3. If required, scroll down the list of options and expand the **Mobile Access Management** section
The [Mobile Access Management](#) page allows you to issue an onboarding token to your mobile device, and manage your deployed tokens

The screenshot shows the Mobile Access Management page with a 'New onboarding token' button and statistics: 0 active tokens and 0 registered devices.

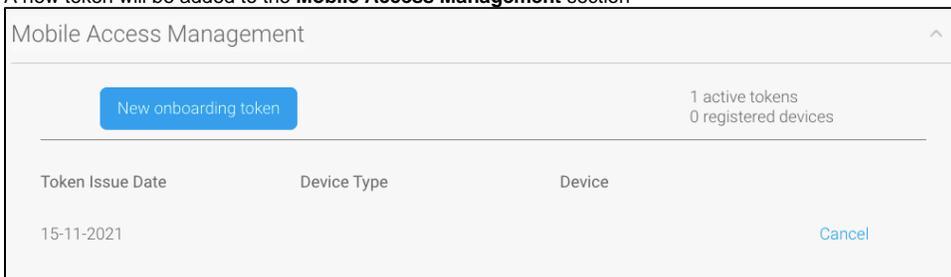
4. Click on the **New onboarding token** button
A confirmation message will appear



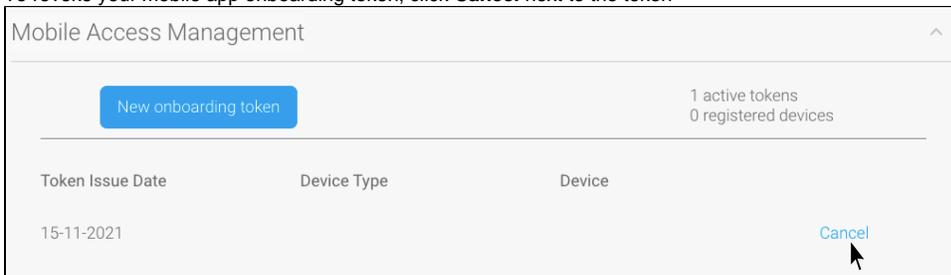
5. Click the **Send** button to confirm and send an invitation



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



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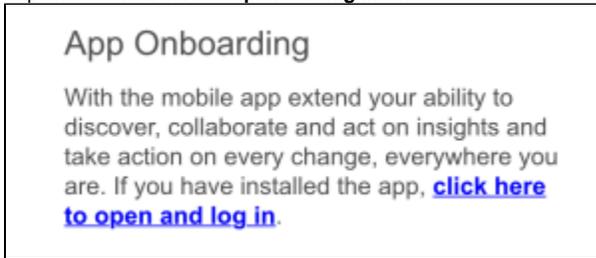
Logging in with an onboarding token

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



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.



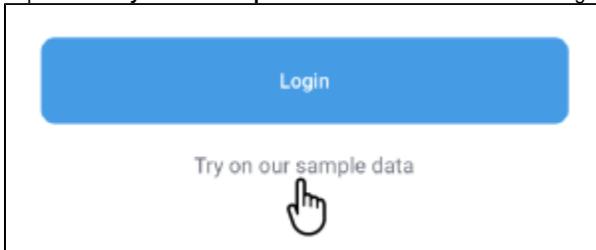
If you exit or switch to another app, you will remain logged in for 15 minutes before being logged out automatically

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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



A form will appear

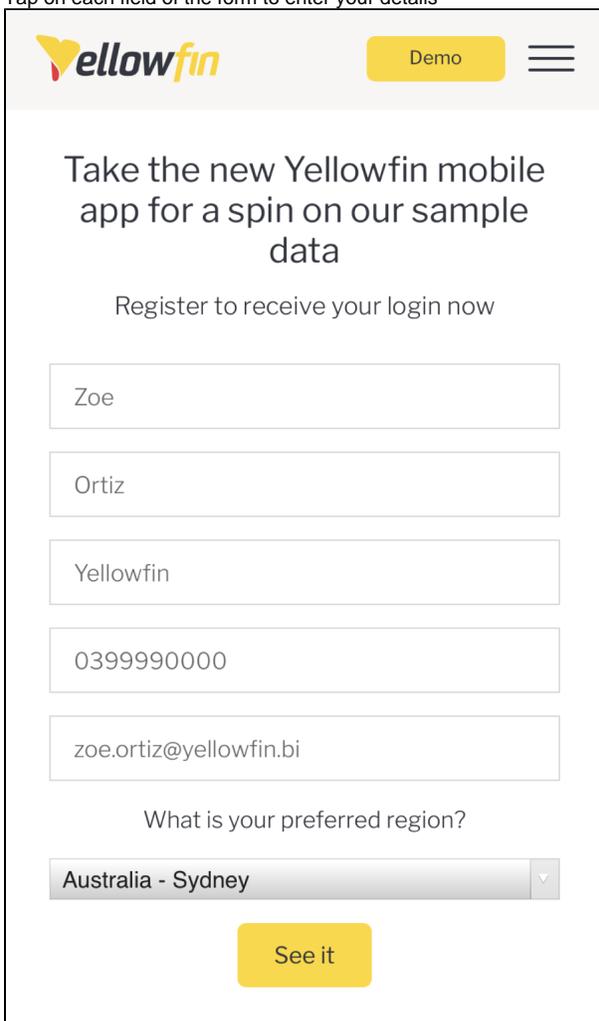
Take the new Yellowfin mobile app for a spin on our sample data

Register to receive your login now

What is your preferred region?

See it

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



The screenshot shows the Yellowfin mobile app registration screen. At the top left is the Yellowfin logo, and at the top right is a yellow 'Demo' button and a hamburger menu icon. The main heading reads 'Take the new Yellowfin mobile app for a spin on our sample data'. Below this is the instruction 'Register to receive your login now'. The form consists of six input fields: a name field with 'Zoe', a surname field with 'Ortiz', a company field with 'Yellowfin', a phone number field with '0399990000', an email field with 'zoe.ortiz@yellowfin.bi', and a region selection dropdown menu with 'Australia - Sydney' selected. At the bottom of the form is a yellow 'See it' button.

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