# Installation Steps


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## Overview

The Yellowfin application installer provides a traditional installation file that can be used on premises or on the cloud, via Linux, Windows and MacOS.

Before you begin the installation process, make sure you have followed the pre-requisites explained in detail on the Install And Deploy Yellowfin wiki page. This includes information about license file options and the download location of the application installer. Make sure you have downloaded the installer for your operating system before beginning these steps.

The installer will provide the following series of prompts for information and confirmations:

- Welcome screen
- Installer language selection
- Terms & conditions confirmation
- Components to install
- License file location
- General configuration settings
- Database selection
- Database details
- Installation path

Once you've provided the required information, the installer will indicate the progress of the installation until completion.

If you are looking for instructions on how to upgrade your Yellowfin instance, click here.

### Installing the Optional Tutorial Content

| Pack | Description |
|---|---|
| **Core** | Software for Yellowfin that must be installed, the minimum package required during installation. |
| **Tutorial Content** | The content pack contains Ski Team sample data, views, reports and dashboards that are used in the Yellowfin training and help documentation. This is particularly useful if you haven't used Yellowfin before. |

### General configuration details

| Configuration | Description |
|---|---|
| **Web Server Port** | Set the port number for Yellowfin to listen for web browser requests. By default, all web browsers send requests using port 80.<br><br>If there are no other web servers on the machine that Yellowfin is being installed on, you can accept the default port number of 8080.<br><br>If there are web servers installed on the machine that Yellowfin is being installed, there may be port clashes and Yellowfin will fail to function correctly. Therefore, the port number must not be in use by any other application on the machine. Port numbers like 8080, 8081 and so on are typically good candidate port numbers. |

| | |
|---|---|
| **Windows Service** | Check this box to install Windows Service on the server, it will automatically start up whenever the Windows Server is booted.<br><br>*Note*: this option will only appear during installation on a Windows platform. |
| **Application Memory** | Specify a memory size (in MB) that should be used by Yellowfin. Yellowfin should be configured to use at least 2GB of memory. By default, the installer will allocate 75% of the system's memory to the Yellowfin application, but this size can be changed here. |

## Database details

The database details required during installation are for the database that stores all the Yellowfin content definitions, configuration information, and event details (i.e. not your report data). This database can be created before the installation or the Yellowfin installer can create it for you.

| | |
|---|---|
| ***Database Server Location*** | |
| **Server Host** | Enter the network address of the database server hosting the Yellowfin database. If the Yellowfin database is on the same computer as the Yellowfin application, enter localhost. |
| **Server Port** | Enter the network port number of the database hosting the Yellowfin database. |
| **Database Name** | Enter the name of the Yellowfin database. If one doesn't exist, enter a new name. |
| **Create New Database** | If the above database does not exist on the database server, select this option to allow the Yellowfin installer to create a new database to host the Yellowfin database using the database name entered above. When you check this checkbox, the Administrator User section will appear on the screen for you to add these existing details so that Yellowfin is granted access to create the new database. |
| ***Authentication Details*** | |
| **Authentication** | This configuration is specific to Microsoft SQL server. Choose how the database users should be authenticated. Options include:<br>• SQL server authentication<br>• Windows authentication |
| **Logon Domain** | If Windows authentication is selected, specify a logon domain. |
| ***Database User*** | |
| **Username** | Enter the name of the database server user account that has access to the Yellowfin database. This database user must have full read and write permissions to the Yellowfin database. |
| **Password** | Enter the password of the database server user account that has access to the Yellowfin database. |
| **Confirm Password** | Re-enter the password of the database server user account that has access to the Yellowfin database. (This is only required if creating a new user.) |
| **Create New User** | If the above database user does not exist on the database server, select this option to allow the Yellowfin installer to create a new database user account to access the Yellowfin database. When selected, the Administrator User section will appear on the screen for you to add the existing details so Yellowfin is granted access to create a new user. |
| **Administrator User** | |
| This section appears if you check the checkbox for Create New Database and/or Create New User. | |
| **Username** | Enter the name of the existing database server user account that has administrator-level access to the database server hosting the Yellowfin database. |
| **Password** | Enter the password of the existing database server user account that has administrator-level access to the database server hosting the Yellowfin database. |

## Installation path

The Yellowfin application installer will suggest an installation path. It should be suitable for most installations, but please consider the following points before using the default.

- If the installation path does not exist, enter the required installation path and the installer will create the directory.
- On Windows, if you select an installation directory in the path C:\Program Files,  the Yellowfin application must always be Run as Administrator.
- On Windows 64bit version, ensure you choose a path outside of the Program Files directory.
- Choosing an installation path without spaces or punctuation characters will make future advanced configuration easier.

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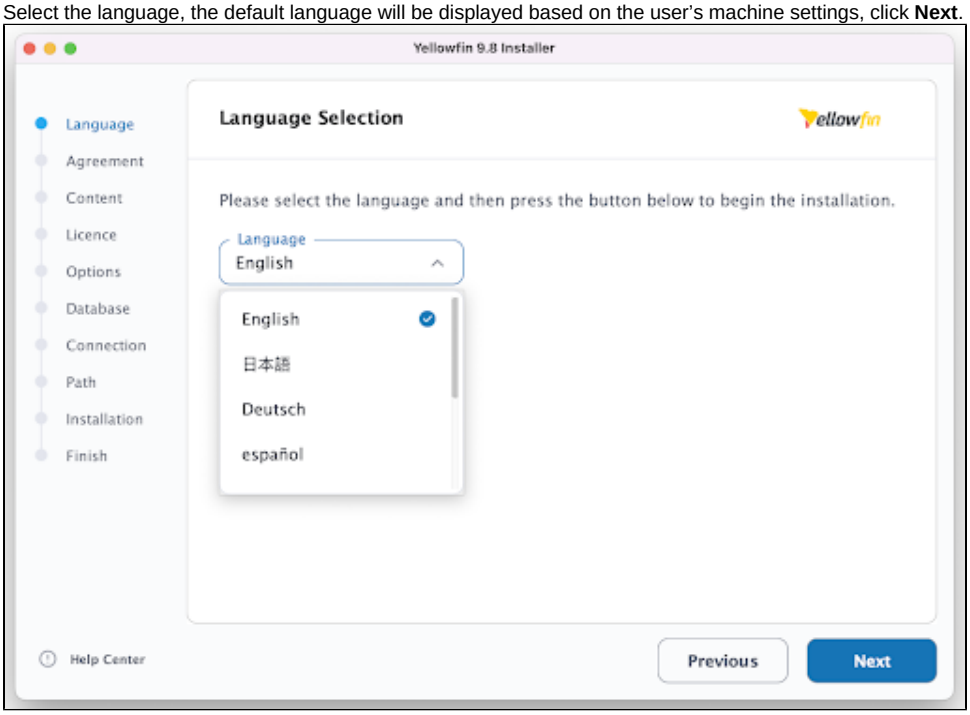
## Install Yellowfin

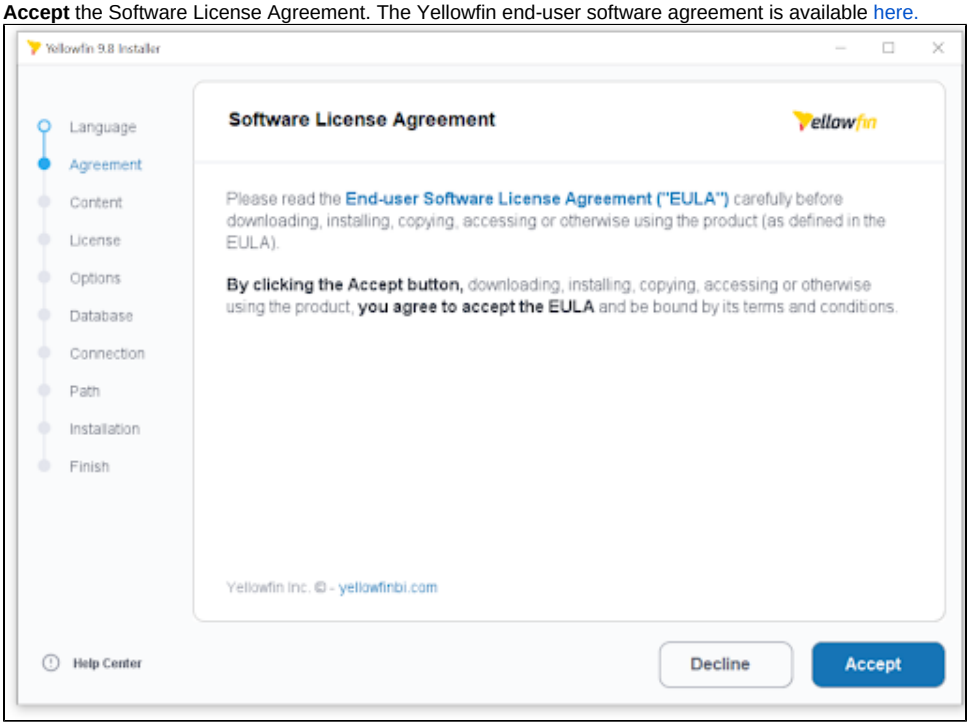
The steps below cover the full installation process.

1. Open the application installer file (the .jar file for MacOS or Linux, or the .exe file for Windows (see Install And Deploy Yellowfin for further details.) Click the arrow to start installation or it will automatically continue after 15 seconds.

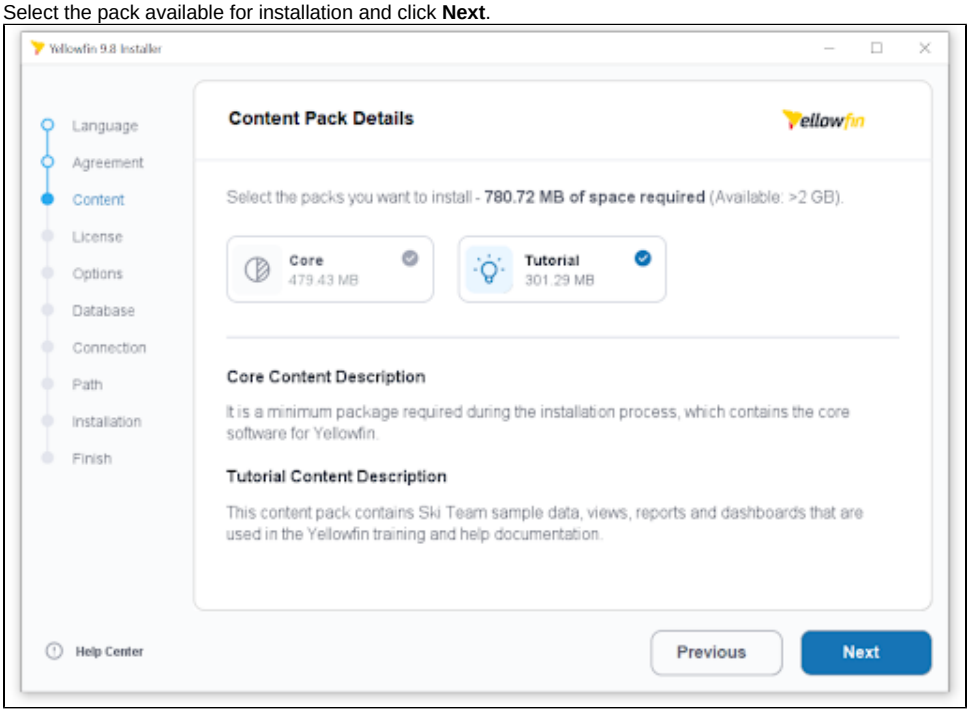
2. Select the language, the default language will be displayed based on the user's machine settings, click **Next**.



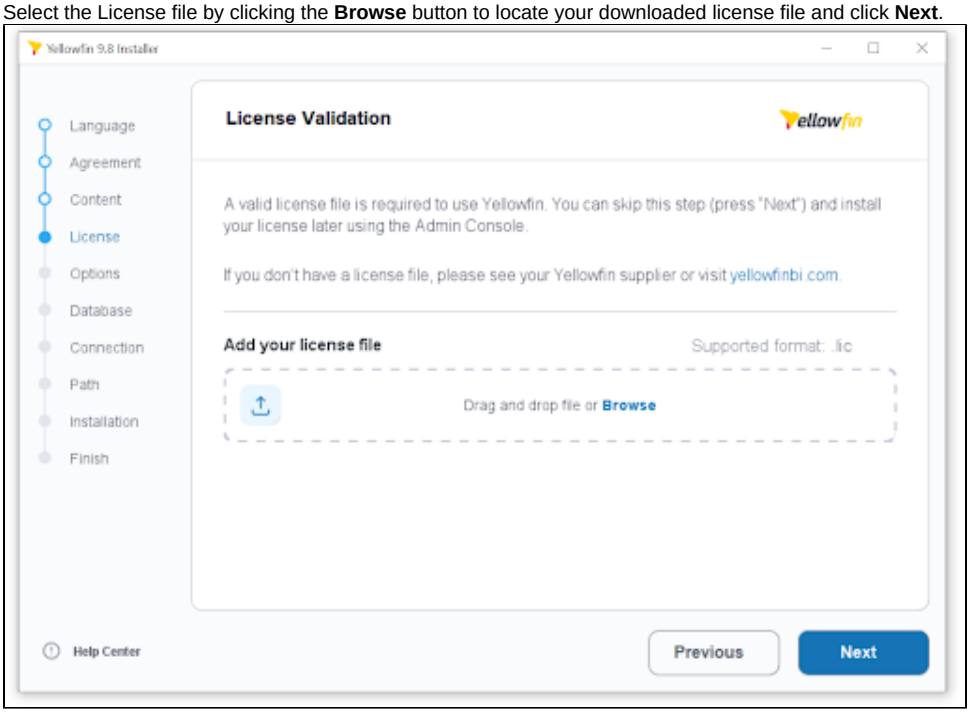

3. **Accept** the Software License Agreement. The Yellowfin end-user software agreement is available here.



4. Select the pack available for installation and click **Next**.

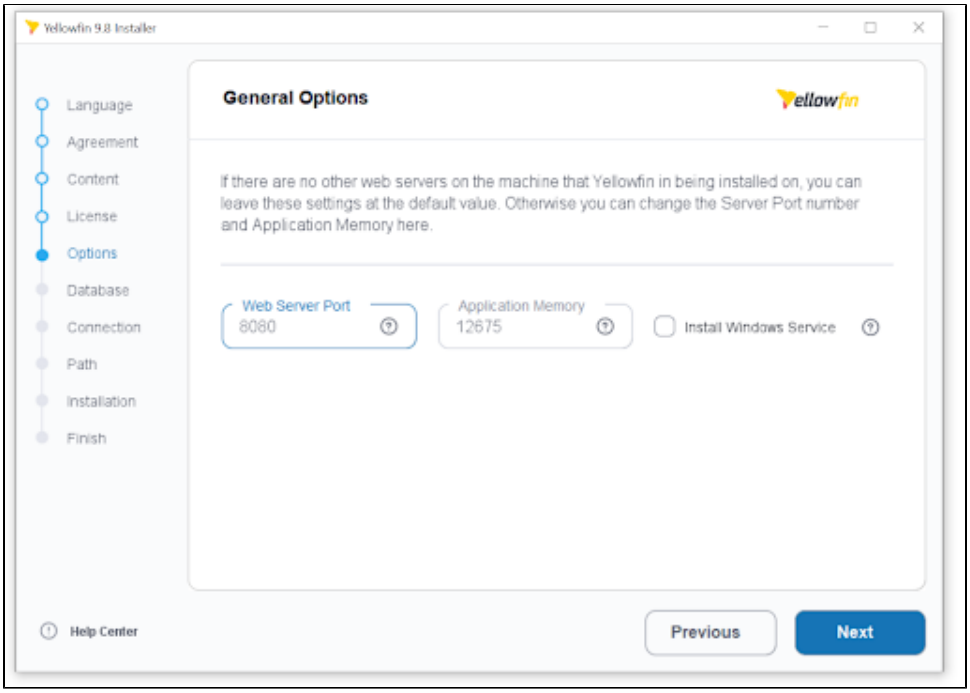



5. Select the License file by clicking the **Browse** button to locate your downloaded license file and click **Next**.

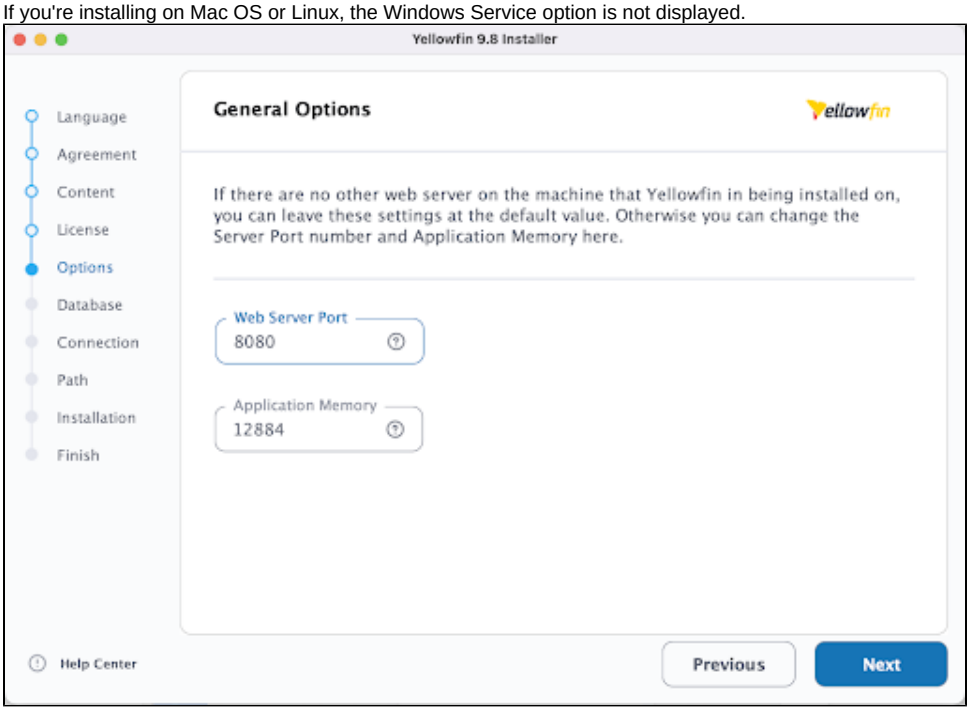



Click here, if you need a Yellowfin license.
You can leave the box blank and add a license later. Check the License Management page.

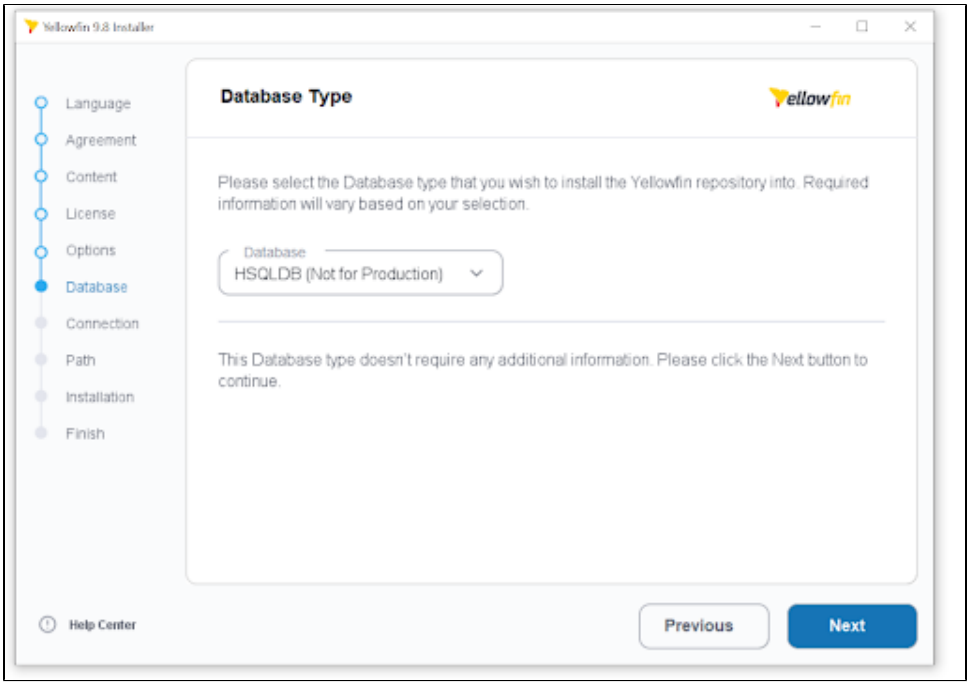
6. In the Options section, leave the default value or change the Server Port and Application Memory, click **Next**.
Refer to the following page for more information.
If you're installing on Windows, the Windows Service option will be added.



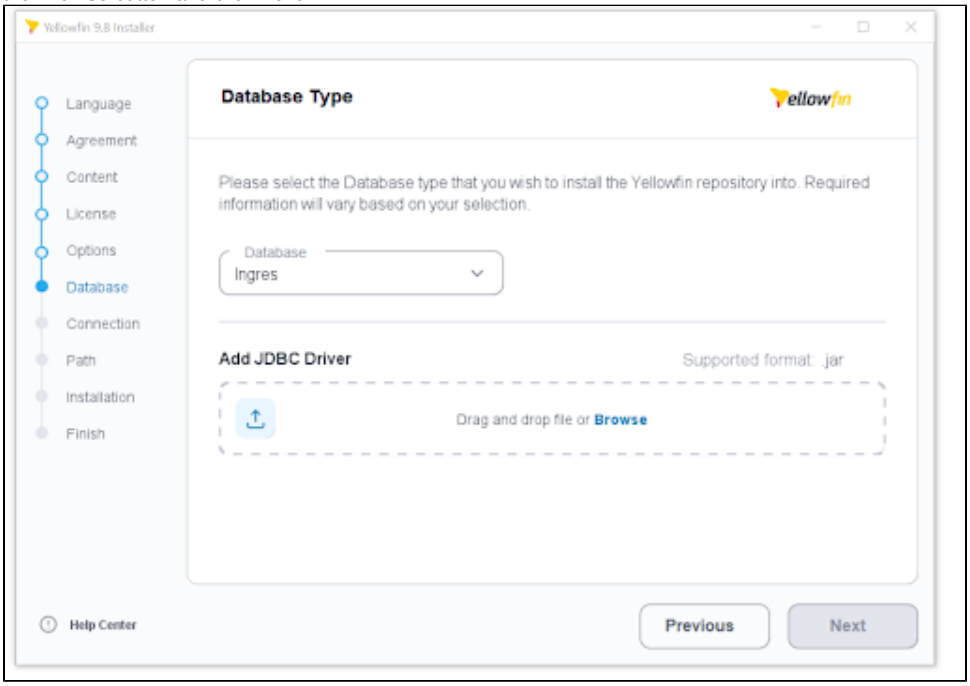

If you're installing on Mac OS or Linux, the Windows Service option is not displayed.



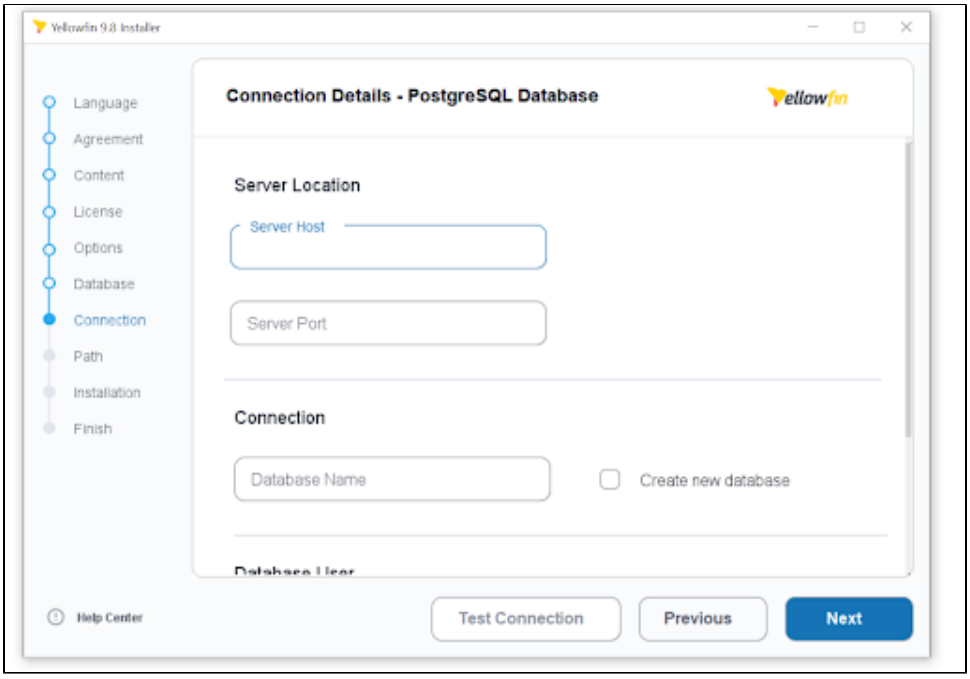

7. In the Database Details section, click on the drop-down to select your database type. Based on your choice, the installation steps from here may differ. (Some drivers are included with Yellowfin and some are not — click here for more details.)



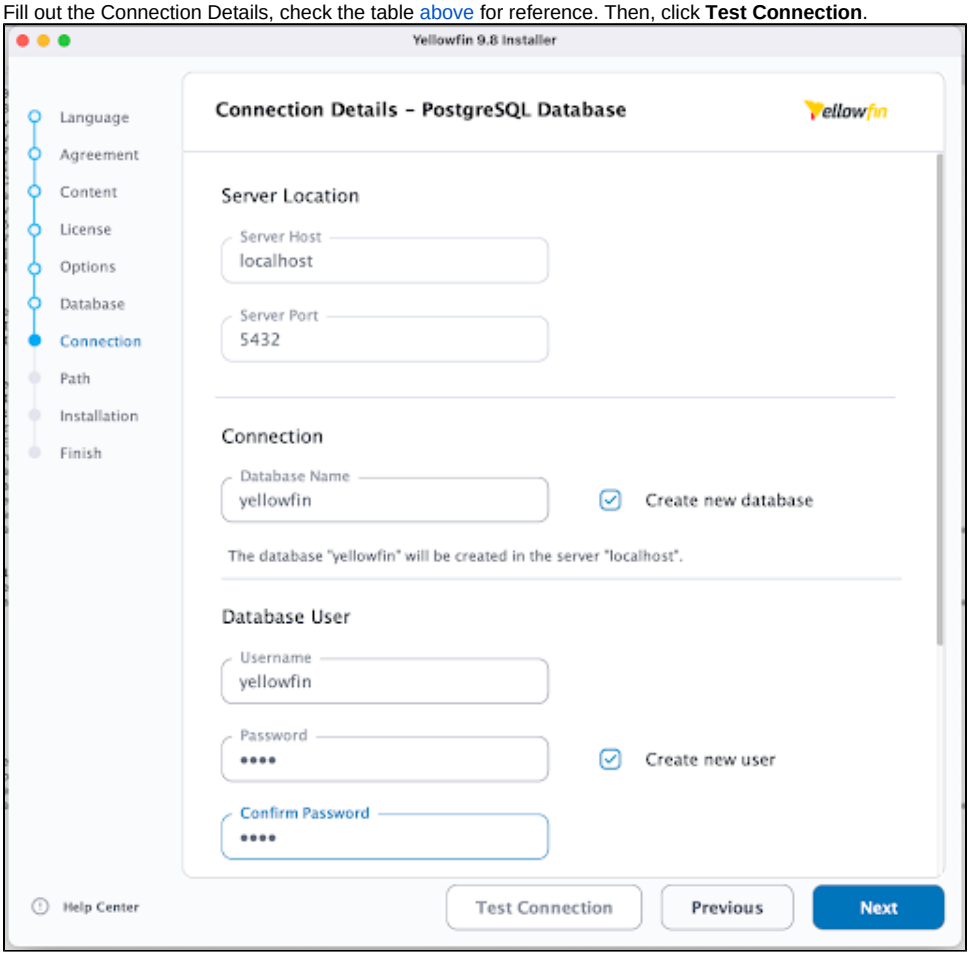

If you've chosen a database that Yellowfin doesn't include drivers for, you will be prompted to locate your driver files. Select any driver files using the **Browse** button and click **Next**.



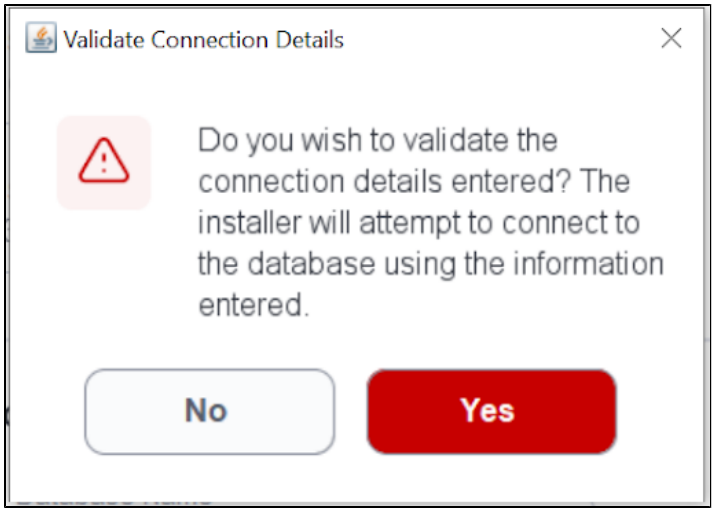

8. The following screen only shows if you chose another database and not **HSQLDB (Embedded - Not for Production)** from the list. It shows different options for different database types.
   The image shows the options for PostgreSQL.

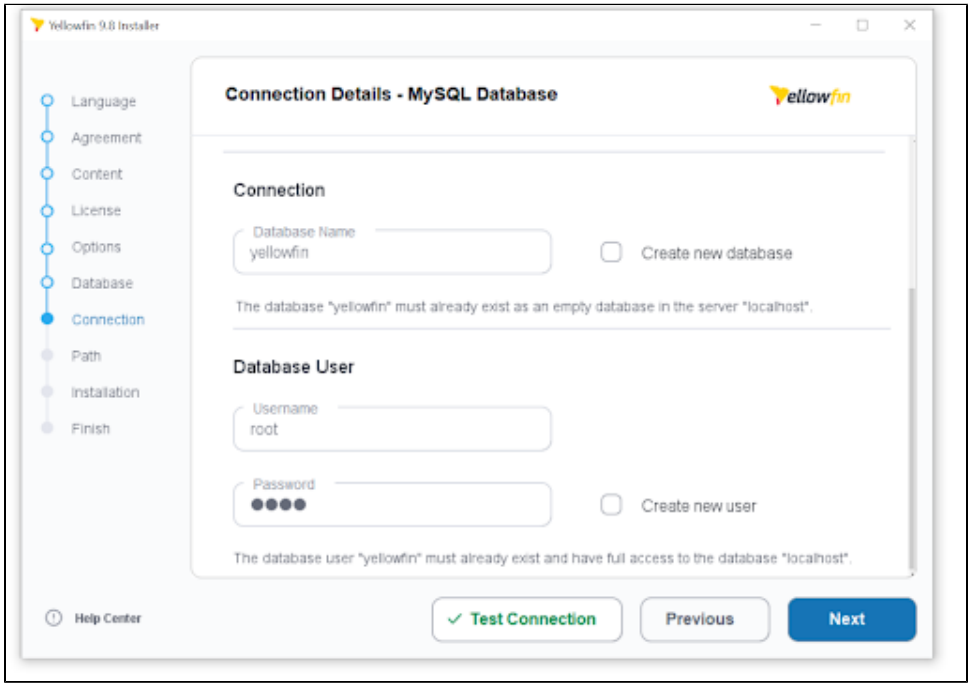


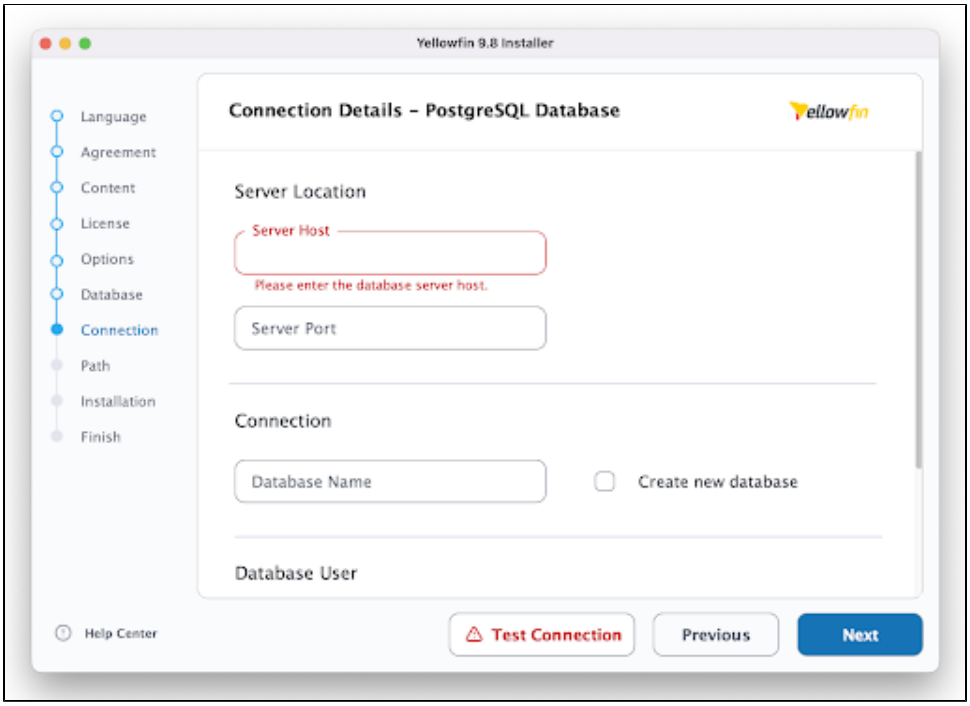

9. Fill out the Connection Details, check the table above for reference. Then, click **Test Connection**.



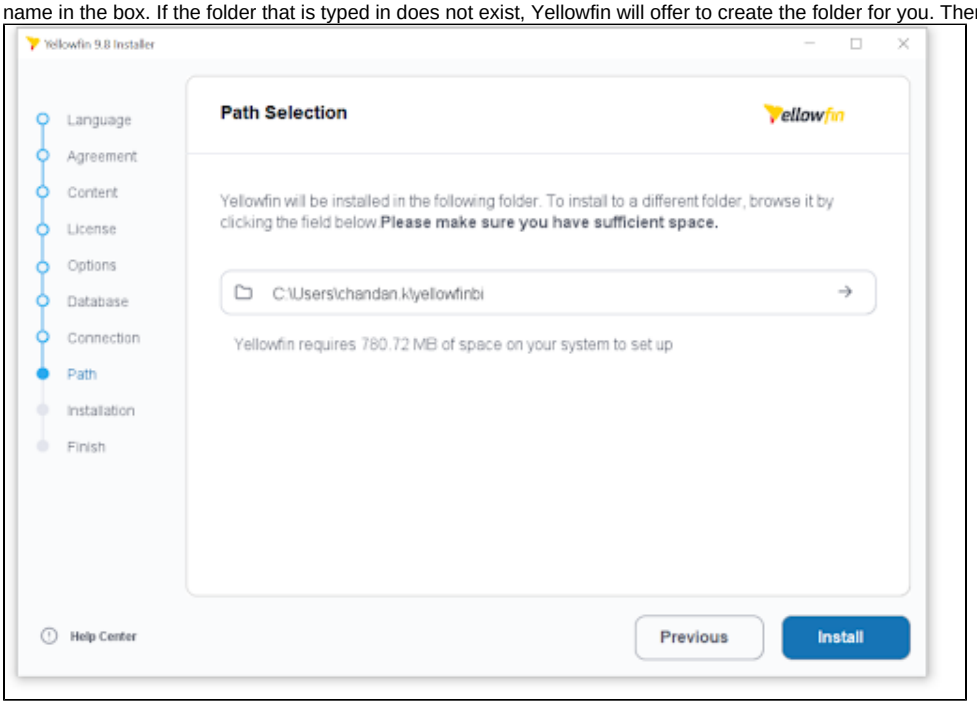

10. Select if you want to validate your credentials or not.
    If the validation is successful, the installer will display the **Test Connection** button in green. If it's not validated, the Test Connection will appear in red, as shown below. Then, click **Next**.


Validate Connection Details
Do you wish to validate the connection details entered? The installer will attempt to connect to the database using the information entered.
No
Yes

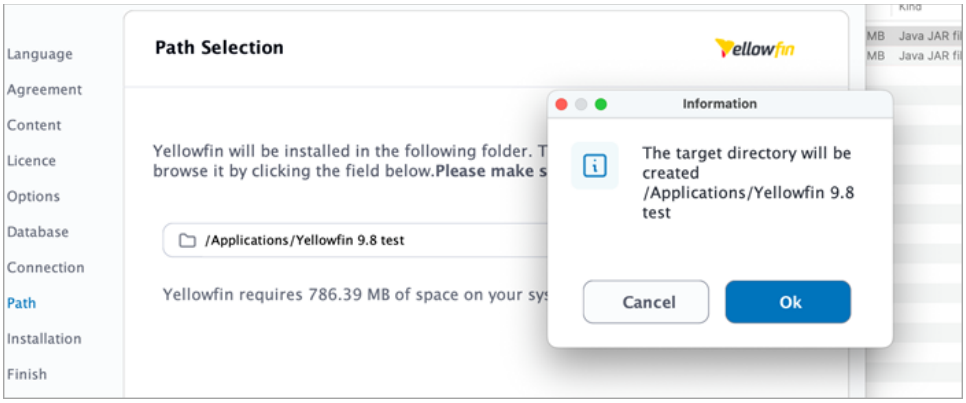

Yellowfin 9.8 Installer
Language
Agreement
Content
License
Options
Database
Connection
Path
Installation
Finish
Connection Details - MySQL Database
Connection
Database Name
yellowfin
Create new database
The database "yellowfin" must already exist as an empty database in the server "localhost".
Database User
Username
root
Password
Create new user
The database user "yellowfin" must already exist and have full access to the database "localhost".
Help Center
Test Connection
Previous
Next



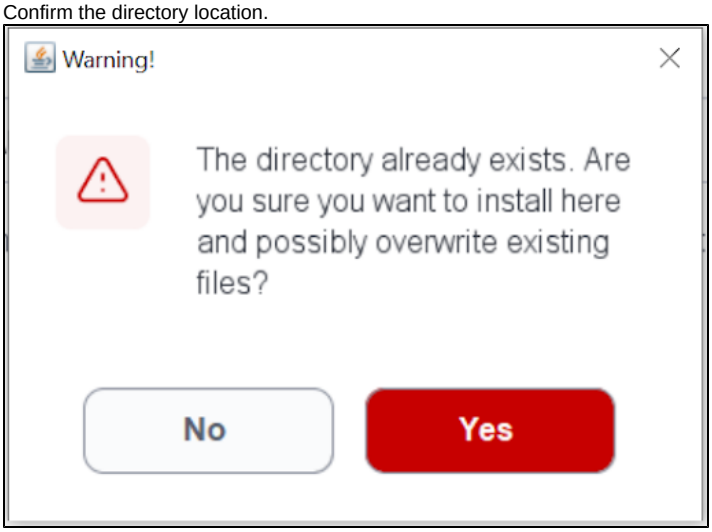

**11.** In the Path section, users can select where to install Yellowfin by accepting the defaulted path, selecting an existing folder or by typing in the path name in the box. If the folder that is typed in does not exist, Yellowfin will offer to create the folder for you. Then, click **Next**.



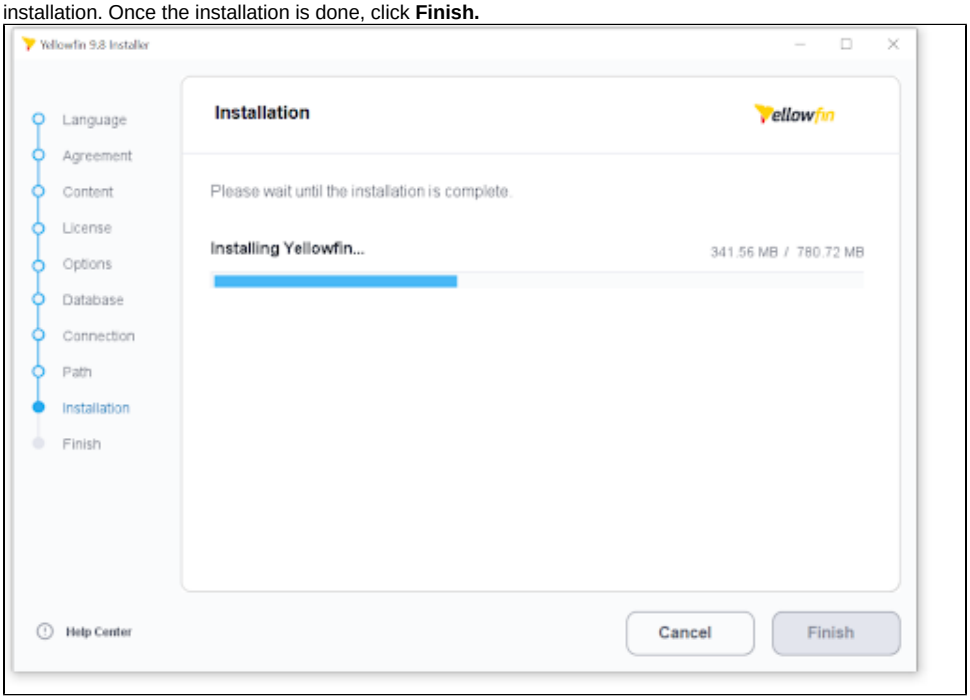

If Yellowfin doesn't recognize the folder, it will give you the option to create it.

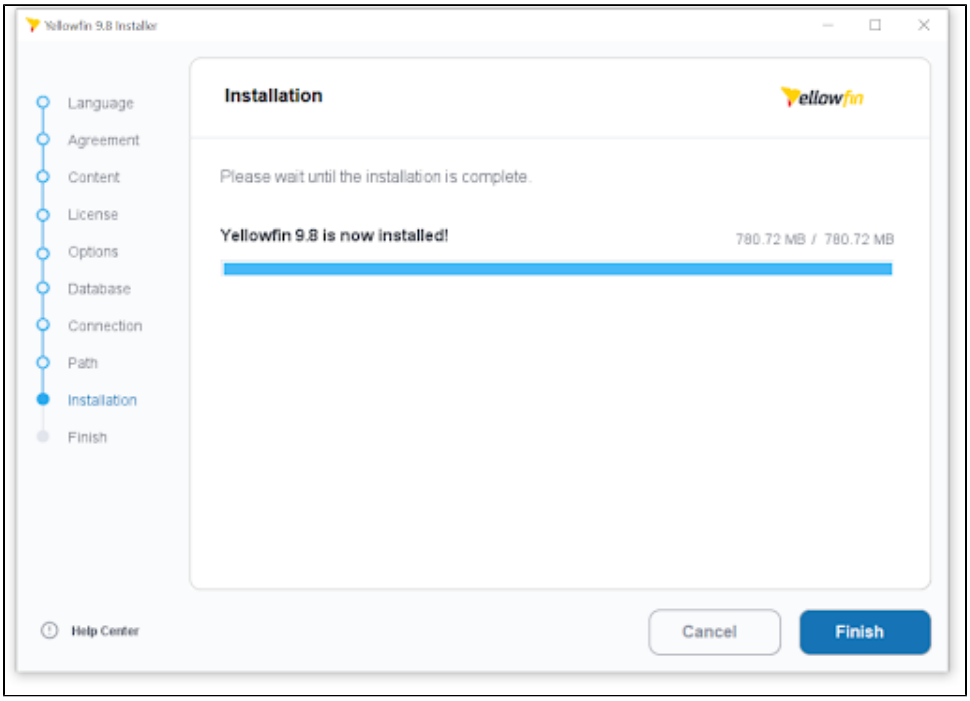



12. Confirm the directory location.

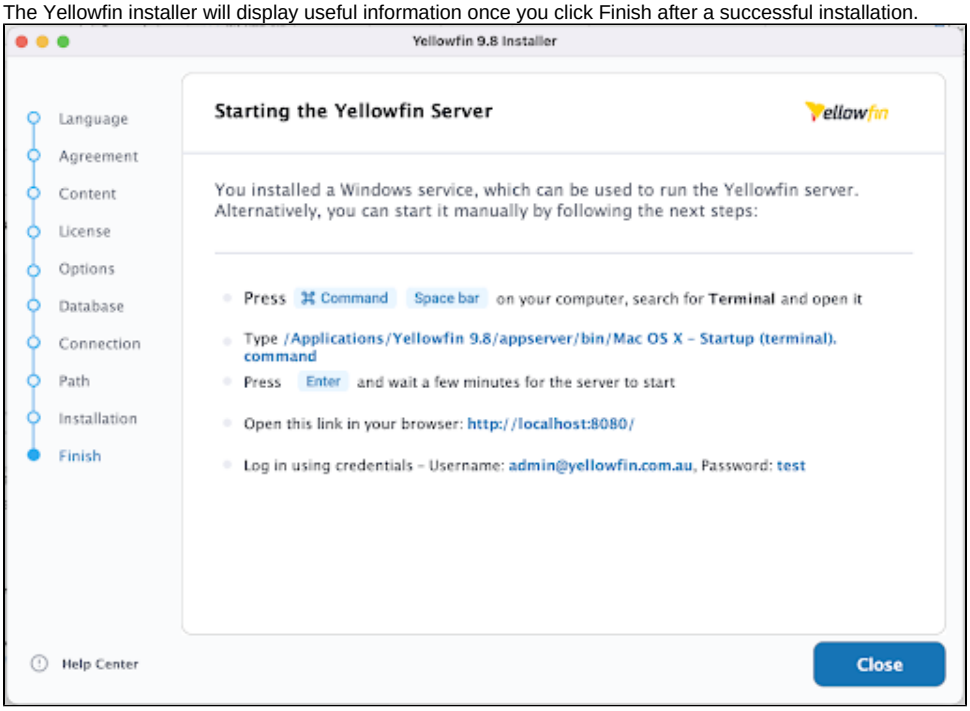


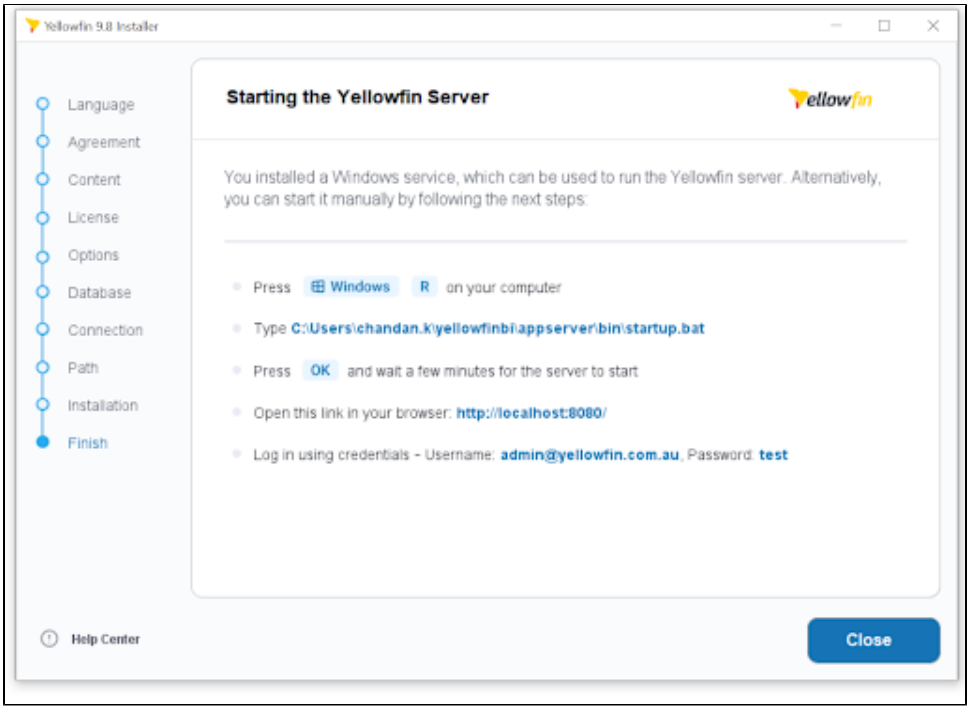

13. The Yellowfin installer will begin the installation process, the time it takes depends on your hardware capacity and the packs you selected for installation. Once the installation is done, click **Finish.**






The Yellowfin installer will display useful information once you click Finish after a successful installation.






Note: In case you don't select the Windows as Service checkbox, the finish screen will be a little different.

14. Click **Close** to complete the installation process.
    If you do not see this screen, contact your Yellowfin representative, contact Yellowfin Support, or see the Troubleshooting section below.
    If you do see this screen, take note of the information provided that details how to start the Yellowfin application and the information you need to log in to Yellowfin from a web browser.

    **Note:** You can click on the left menu to browse previous steps. Clicking **Next** is not allowed.

⚠ An uninstall function has been created under the directory nominated in the database selection step.

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## What next?

Now that Yellowfin is successfully installed on your machine, it's time to deploy. Visit the Deploy Yellowfin page for full details and instructions for a first-time deployment of Yellowfin and the minimal configuration needed.

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## Troubleshooting

Most problems related to the Yellowfin application server installation are related to database connectivity and administration issues.

As mentioned previously, a log is kept of the database installation and can be found in $INSTALL_DIRECTORY\uninstall directory.

A common issue with the installation could be the incorrect setting or misspelling of the parameters entered in *Step 7. Configure the Database Connection and User parameters*. For example, database name, port, IP address, etc.

Customers using Microsoft SQLServer or Microsoft MSDE should ensure that the IP addresses and configuration are consistent with the parameter values entered. The Microsoft program svrnetcn.exe (*SQLServer Network Utility*) can be used to check that the SQLServer IP stack (including the JDBC port number) has been configured correctly. It can be used for both SQLServer and MSDE.

### Example

***Network error IOException: Connection refused: connect()***
This error means that the installer cannot connect to your MS SQL server instance. This error occurs before authentication takes place.

1. SQL Server is stopped on the server you are trying to connect to.
2. The connection details you entered were incorrect.

3. You have a network problem that stops the computer you're running the installer on from connecting to the SQL server host (unlikely if you are connecting to your localhost).

Verify these settings on the Configuration DB Parameters screen on the installer.

1. Database Server Name: This will probably be the "localhost".
2. Database Server Port: This should be 1433.
3. Database Name: This is the name of the database you want Yellowfin to install to. This should be "yellowfin". This is used for Yellowfin configuration and operational data. It is not the database you wish to report off.
4. Create Database: Click this to create the new Yellowfin database. We suggest removing the Yellowfin database if your installation failed previously.
5. DBA User: This could be "sa".
6. DBA Password: This could be "sa".
7. Reports UserId: Set this to "yellowfin_user".
8. Reports UserId password: Set this to "yellowfin_user" or whatever you prefer.
9. Create user id: Check this checkbox.

## Contact Support

If the example above do not solve the issues, please send an email to support@yellowfin.bi with a clear description of the issue, along with the following:

1. Screenshots (if applicable).
2. YellowfinInstallLog-date.log (this can be found in the Yellowfin directory).
3. All log files found in Yellowfin\appserver\LOGS (if you have any).

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Section navigation
**Current topic - Install on Premises**

This page is part of the Install And Deploy Yellowfin section of the wiki, which has these topics:

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Install on Premises

- Installation Steps

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- Yellowfin for Azure
- Yellowfin for Google Cloud Platform

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- Kubernetes
- Upgrading Yellowfin Container Deployment

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Deploy Yellowfin

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- Yellowfin Directory Structure
- User Welcome

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Advanced Deployments

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- Yellowfin Server Specification
- Automate Yellowfin Deployment on Linux
- SAML Bridge
- Standalone Configuration Tools

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