

Creating a presentation

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Overview


Presentations can be created by any Yellowfin user if their role permits it. When you create a presentation, you can select a default data set if you wish to include reports or charts from an existing view.

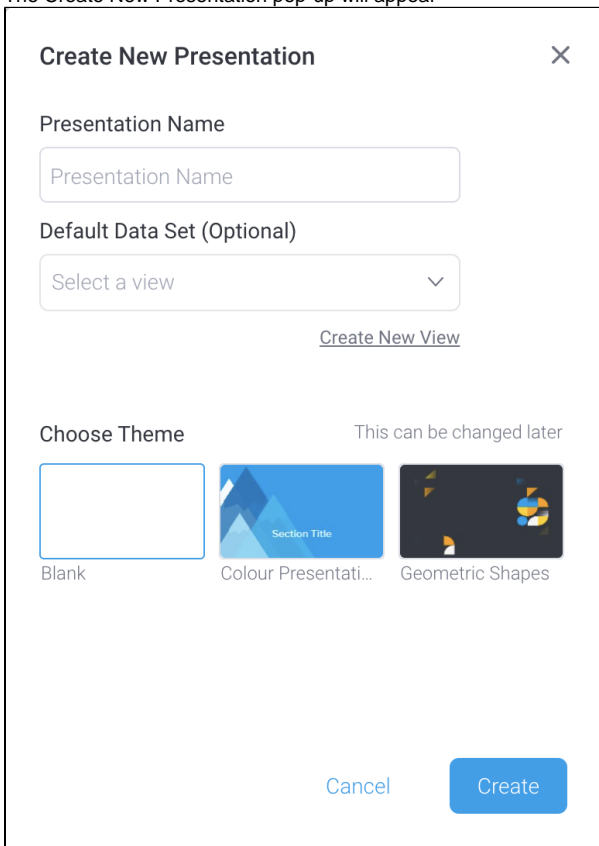
Yellowfin ships with a few themes that you can use as templates for presentations, but if these don't suit your needs, you can create your own themes. Let's start with creating a presentation from an existing theme. Note that slides are a fixed size that cannot be changed.

Code mode is also available in Yellowfin Present, which is useful to developers who wish to extend the functionality through custom code widgets.

Create a presentation

Like other Yellowfin content, presentations can be created from the top right corner of the Yellowfin screen.

1. Click on the **Create**  button in the top right corner, and select **Present**
The Create New Presentation pop-up will appear



The 'Create New Presentation' pop-up form is a modal window with a title bar 'Create New Presentation' and a close button 'X'. It contains the following fields and options:

- Presentation Name:** A text input field with the placeholder text 'Presentation Name'.
- Default Data Set (Optional):** A dropdown menu with the text 'Select a view' and a downward arrow. Below it is a link 'Create New View'.
- Choose Theme:** A section with the text 'This can be changed later' and three theme options:
 - Blank:** A white square with a blue border.
 - Colour Presentati...:** A blue square with a white triangle and the text 'Section Title'.
 - Geometric Shapes:** A dark blue square with yellow and white geometric shapes.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' (light blue) and 'Create' (blue).

2. Enter a name in the **Presentation Name** field
3. If you intend to add charts or reports, click on the dropdown for **Default Data Set** and choose the appropriate view (or click on the **Create New View** option to create a new view; this will take you away from your presentation and into the View builder)

4. If you wish to use an existing theme to your presentation, click on the theme's thumbnail (otherwise, the Blank theme is used by default)

Create New Presentation

Presentation Name

My first presentation

Default Data Set (Optional)

Ski Team

Create New View

Choose Theme

This can be changed later

Blank

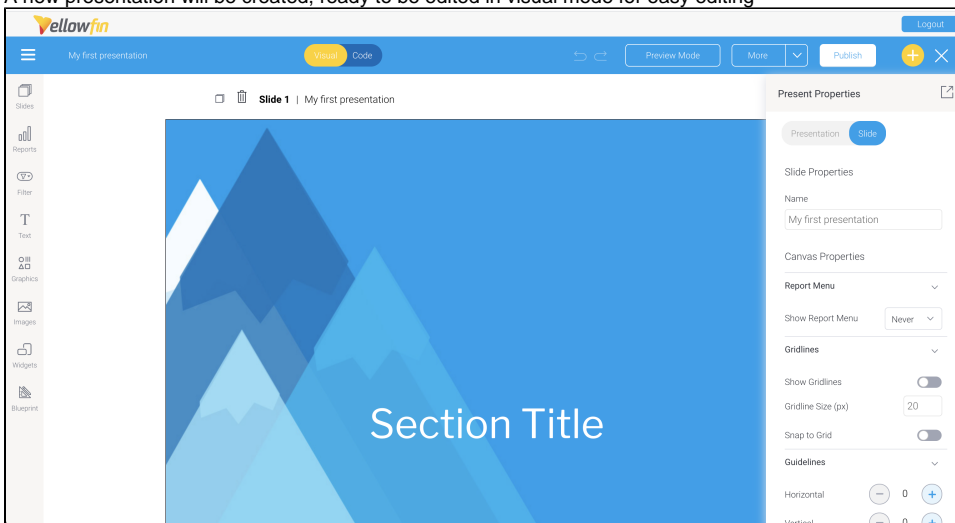
Colour Presentati...

Geometric Shapes

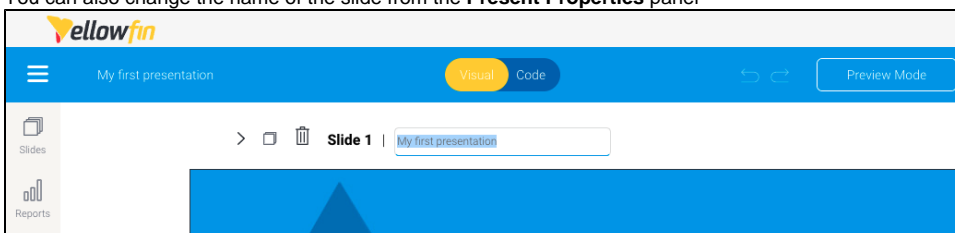
Cancel

Create

5. Click on the **Create** button
6. A new presentation will be created, ready to be edited in visual mode for easy editing



7. Take a look at the **Present Properties** panel on the right-hand side of the screen to see how each slide and your entire presentation can be customized
8. Using your mouse, double click on the **slide name** in the slide header to change it
You can also change the name of the slide from the **Present Properties** panel



9. Use the toolbar on the left to add content to your slides (for more information on these tools, see our [Present Objects](#) page)
As you work on your slides, your presentation is automatically saved as a draft
10. When're ready to publish and share your presentation, click on the **Publish** button in the top right corner



If you'd like to save your presentation as a theme, see our page about [Creating a Present Theme](#) for further information.

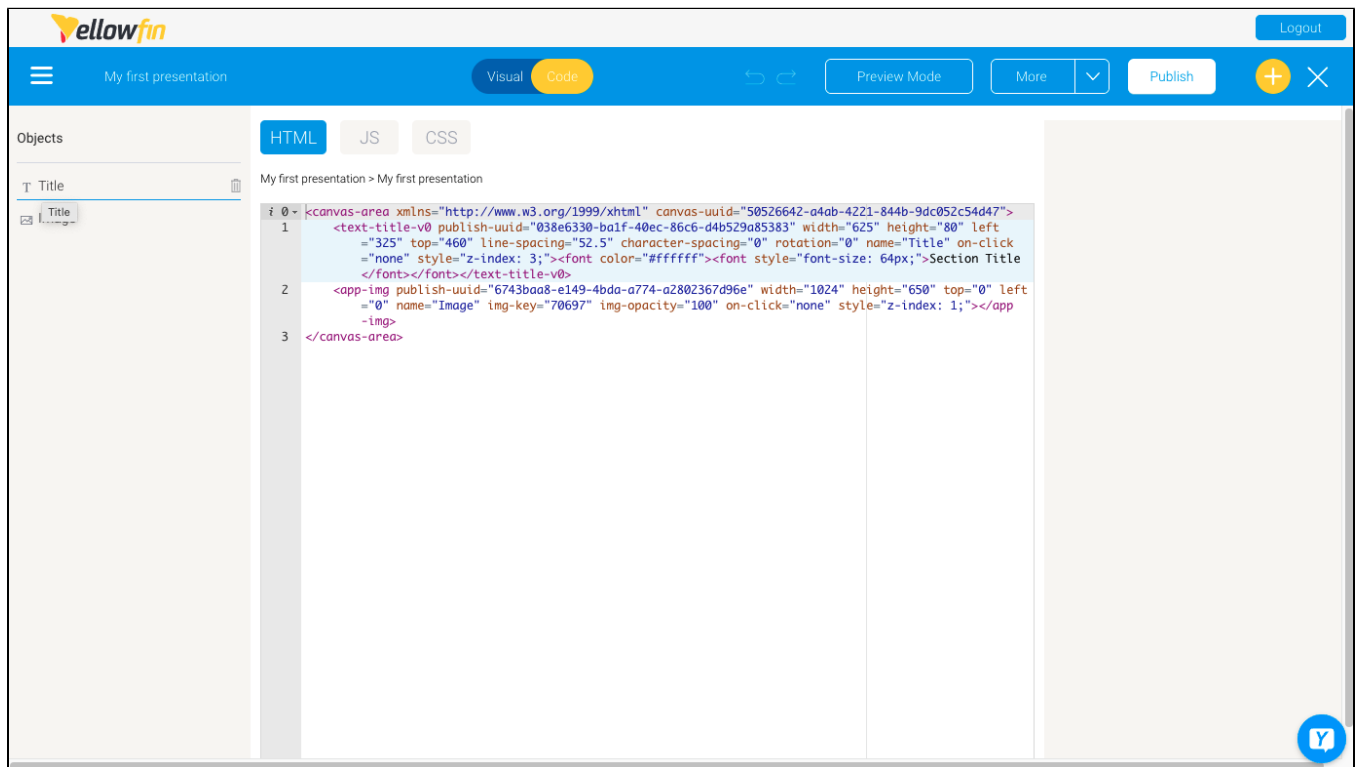
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Enhancing presentations with Code Mode

Similar to the dashboard canvas, Yellowfin Present also provides code mode, and support for custom code widgets.

Authorized developers can extend presentation functionality within Yellowfin and create rich application experiences, using HTML, CSS, and JavaScript. Code Mode appears as an additional editing mode on the Present builder.

Learn more about code mode [here](#).



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Custom Code Widgets

Developers can also add custom [Code Widgets](#) to be used in Present. These widgets are capable of supporting any type of functionality you could dream up, and are ideal if you wish to repeatedly apply the functionality to a presentation. Once imported through the plugin manager, they will appear in the Code Widget panel.



We recommend 'testing' the code widget functionality in code mode before importing the code widget.

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