

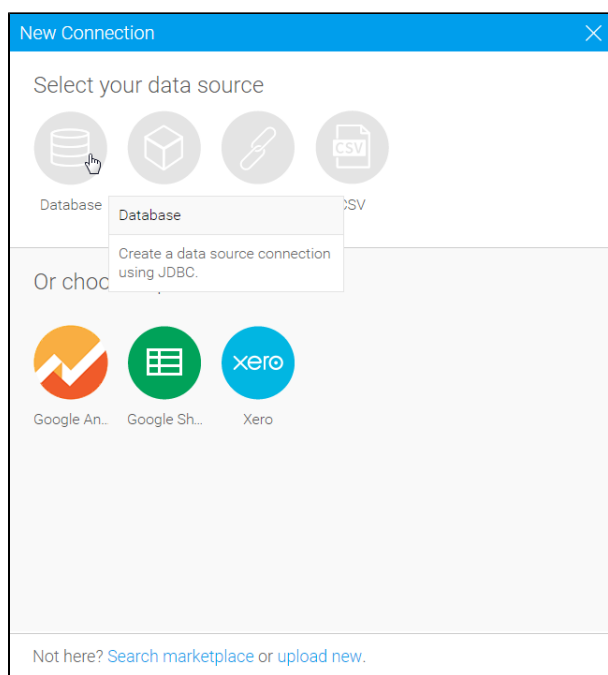
Understanding Source Connection Parameters

- [Overview](#)
- [New Connection Window](#)
 - [Next Steps](#)
- [Advanced Connection Editor](#)
 - [Connection Description](#)
 - [Connection Settings](#)
 - [Connection Pool](#)
 - [Security](#)
 - [Access Filters](#)
 - [Usage Parameters](#)
 - [Views & Content](#)

Overview

[top](#)

When creating a new data source connection, you will need to first specify either the type of source you wish to connect to, or provide/select a third party connector to use.



This page will be dedicated to exploring parameters available when connecting to a database.

See [Third Party Connectors](#) for or [CSV Data Imports](#) for more information on other types of connection.

New Connection Window

[top](#)

When creating your new database connection, you will be presented with a basic list of details to complete.

The 'New Connection' dialog box features a blue header with a close button. Below the header is a progress bar with three steps: 'Connection Setti...', 'Create View', and 'Analyse'. The main area contains the following fields:

- Name: [Text Input]
- Description: [Text Input]
- Database Type: [Dropdown Menu with '-- Select --' selected]
- Username: [Text Input]
- Password: [Text Input]

At the bottom, there is a blue button labeled 'Create View' with a dropdown arrow.

This will include;

1. **Name**
2. **Description**
3. **Database Type** (from the drivers you have available)
4. **Username**
5. **Password**

Once you have selected your database type, you will be prompted to complete options specific to your connection.

Next Steps

When the basic connection details are complete you will need to choose how you wish to proceed.

The 'New Connection' dialog box shows the 'Advanced Connection Editor' screen. The progress bar indicates the 'Create View' step is active. The fields are populated with the following values:

- Name: Ski Team Data
- Description: Tutorial data based on the Ski Team business.
- Database Type: Microsoft SQL Server
- Include Schema in SQL: ☒
- Database Host: localhost
- Use Named Instance: ☐
- Database Port: 1433
- Database Name: NewSkiTe
- Database Authentication: SQL Auth
- SSL Required: Disabled

A context menu is open over the 'Database Authentication' field, showing the following options:

- Advanced Connection Editor
- Test Connection (highlighted by a mouse cursor)
- Create View
- Save & Close
- Cancel

At the bottom, there is a blue button labeled 'Create View' with a dropdown arrow.

The following options may be available;

1. **Create View** - this will allow you to continue onto the New View window. See [Creating a View](#) for more information.
2. **Advanced Connection Editor** - this will take you to the advanced options available for your connection, otherwise accessed via the Admin Console.
3. **Test Connection** - this will allow Yellowfin to test the connection information provided to ensure that the database can be reached.
4. **Save & Close** - this will allow you to save your connection and return to the page you were previously on.
5. **Cancel** - this will allow you to close the New Connection window without saving your connection.

Advanced Connection Editor

[top](#)

In order to edit the advanced options of a new or existing connection you will need to access its connection details through either the [Administration Console](#) or the [New Connection Window](#) options. From here you will have a range of options, split into the groups explored below.

Connection Description

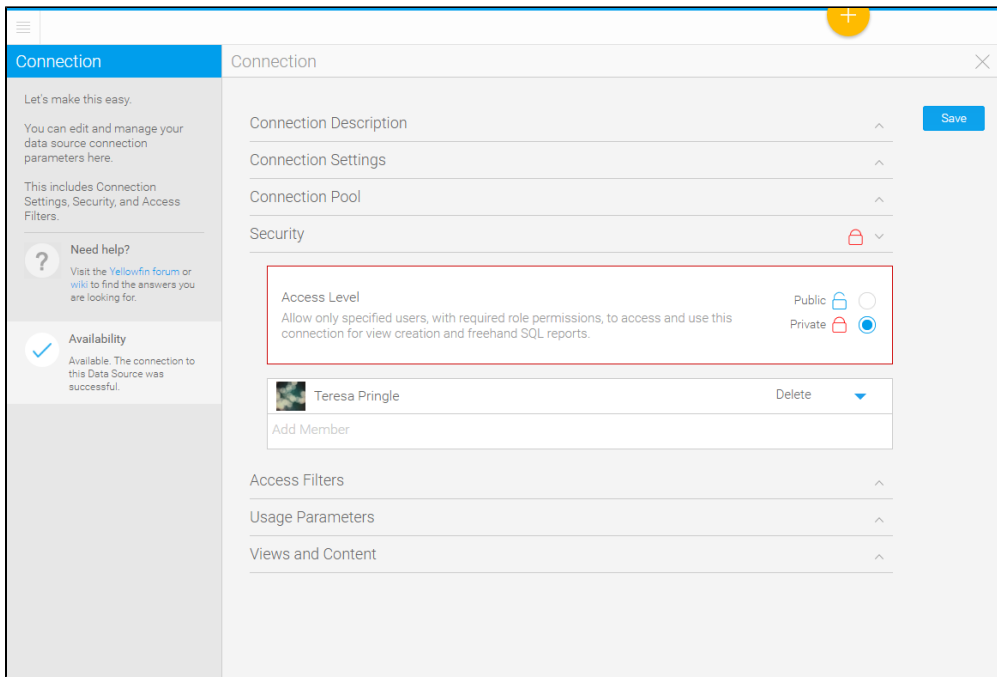
This section allows you to define the basic metadata for your connection; **Name**, **Description**, and **Tags**. These items should be descriptive as users will need them in order to identify the connection when building content.

The screenshot displays the 'Advanced Connection Editor' window. On the left is a sidebar with a 'Connection' header and a 'Let's make this easy.' section. Below this, it states 'You can edit and manage your data source connection parameters here.' and 'This includes Connection Settings, Security, and Access Filters.' There are two status indicators: 'Need help?' with a question mark icon and 'Availability' with a checkmark icon, indicating the connection is successful. The main area is titled 'Connection Description' and contains a 'Database' icon, a text input field with 'Ski Team Data', a description field with 'Tutorial data based on the Ski Team business.', and a '+ Add tags' button. A 'Save' button is in the top right. A list of settings is on the right: Connection Settings, Connection Pool, Security (with a lock icon), Access Filters, Usage Parameters, and Views and Content, each with an expand/collapse arrow.

Connection Settings

These are the connection parameters that need to be defined in order for Yellowfin to know how to access your database.

You will be presented with a list of parameters that relates to the type of database you have chosen to connect to, as each database may require different options.



There are two main options available:

1. **Public:** allow all users with required role permissions to access and use this connection for view creation and freehand SQL reports.
2. **Private:** allow only specified users, with required role permissions, to access and use this connection for view creation and freehand SQL reports.

If you set the data source to **private** you will then need to define specific users, or groups of users, to have access to the connection. Each user can be assigned one of the following levels of access;

1. **Read:** allows users to see views based on this data source in the data sources and views page, and when creating a report.
2. **Update:** allows users to create, edit, or copy either a view or freehand SQL report based on this data source, as well as the above **Read** level of access.
3. **Delete:** allows the user to **Delete** this data source connection, as well as both of the above **Read** and **Update** levels of access.

Access Filters

This list allows you to add new, and manage existing, access filters.

Connection

Let's make this easy.

You can edit and manage your data source connection parameters here.

This includes Connection Settings, Security, and Access Filters.

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Need help?

Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.

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Availability

Available. The connection to this Data Source was successful.

Connection

Security

Access Filters

Usage Parameters

Views and Content

Content Usage

Ski Team

117 Reports



Agency Benchmark

Top N Agencies compared to all other Agencies by demographic



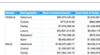
Agency Sales over Time

View agency sales by agency type over time.



Agency Sales over Time

View agency sales by agency type over time.



Athlete

An athlete KPI report used to highlight KPI dashboard tab functionality

[top](#)