

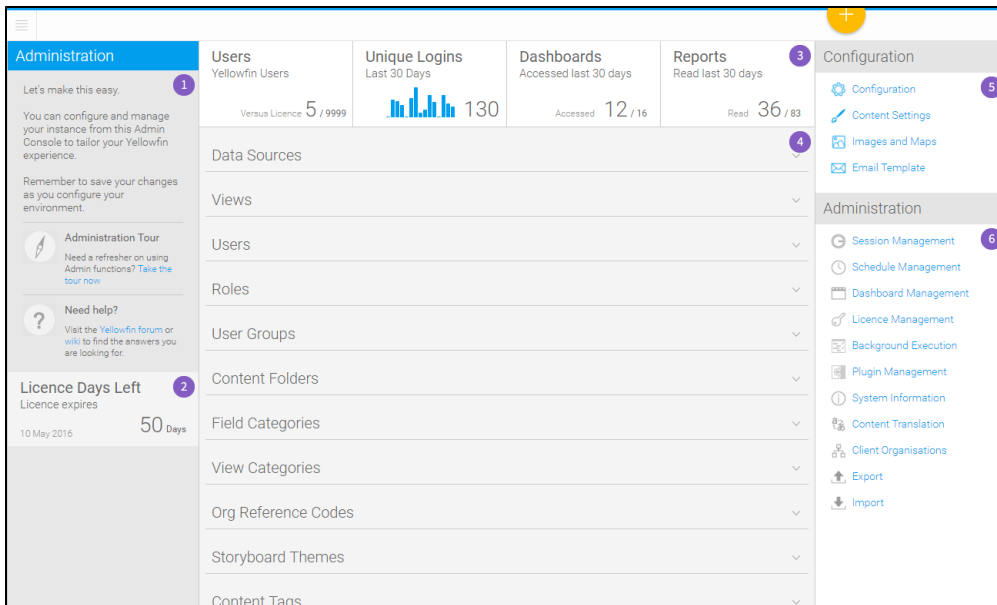
# Admin Console

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## Overview

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The Administration Console is a centralised configuration page that allows admin users fast access to all the controls they need to maintain the system.



The Admin Console is split into the following panels:

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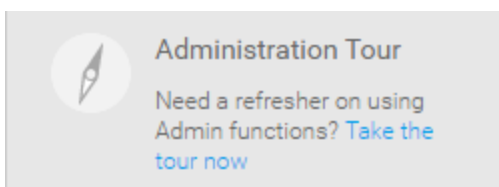
## Administration Tour & Help

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This panel provides new administrators with a brief overview of the page and access to the Administration Tour storyboard and help.

### Administration Tour

The Administration Tour storyboard is designed to give users a quick run through the components available in the Admin Console.



By default, if Tutorial Content was loaded during installation, the tour storyboard will be available as sample content. If tutorial content was not loaded, or a custom storyboard is to be used for this purpose, the Administration Tour can be configured through **Administration > Configuration > System Tab > General**. Here the user can select any active storyboard to use.

## Help

The **Need Help?** section provides admin users with links to [wiki documentation](#) and the [support forum](#).

Need help?

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

This is only available when the application name is configured as **Yellowfin**. To change the application the following script can be run on the Yellowfin Configuration database:

```
insert into Configuration (IpOrg,ConfigTypeCode,ConfigCode,ConfigData)
values (1,'SYSTEM', 'APPNAME', 'NewApplicationNameHere')
```

The **NewApplicationNameHere** should contain the name you wish to assign the application.

**Note:** you will need to shutdown Yellowfin before applying this change.

## Licence Countdown

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This panel provides admin users with a quick status check of their licence. The countdown figure will change to **red** when there is less than **45** days left in order to draw the admin's attention. The expiry date itself is also displayed in the panel.

Licence Days Left


Licence expires

10 May 2016

50 Days

## Usage KPIs

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These are designed to help the administrator monitor how much of the system content is actively used.

|  |   |  |   |
|--|---|--|---|
| <p>Users</p> <p>Yellowfin Users</p> <p>Versus Licence 5 / 9999</p> | <p>Unique Logins</p> <p>Last 30 Days</p>  <p>130</p> | <p>Dashboards</p> <p>Accessed last 30 days</p> <p>Accessed 12 / 16</p> | <p>Reports</p> <p>Read last 30 days</p> <p>Read 36 / 83</p> |
|--|---|--|---|

| KPI           | Description   |
|---------------|---|
| Users         | This monitors the number of registered writers vs. the number of licenced writers, allowing the administrator to see how close they are to the licence limit. When there are less than <b>5%</b> users left available on the licence, the number will be highlighted <b>red</b> . |
| Unique Logins | This monitors the number of unique user logins in the last 30 days, allowing the administrator to see how the system traffic is tracking.   |












|                   |   |
|-------------------|---|
| <b>Dashboards</b> | This monitors the number of unique dashboard tabs accessed each day for the last 30 days vs. the total number of active tabs available, allowing the administrator to see what proportion of tabs are used.<br>When less than <b>50%</b> of dashboards are used, they're highlighted <b>red</b> . When more than <b>75%</b> are used, they're highlighted <b>blue</b> |
| <b>Reports</b>    | This monitors the number of unique reports accessed each day for the last 30 days vs. the total number of active reports available, allowing the administrator to see what proportion of reports are used.  |

## Main Panel

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This contains commonly used definitions and settings in Administration. Expand the titles below to view more information.

Data Sources

| Connection | Description  |   |
|------------|--|---|
| CSV        | CSV  |     |
| Samples    |  |     |
| Ski Team   | Ski Team is the demonstration and tutorial database. |      |

Add

This displays a list of data source connections currently available in the system. From here the administrator can add, edit, or delete connections.

See [Data Sources](#) for more information.

Views

Search Views

| <div><div></div><div></div></div> | View          | Description                                    |  |
|-----------------------------------|---------------|--|--|
| <div></div>                       | CSV           |  | 2 Views  |
| <div></div>                       | Samples       |  | 1 View   |
| <div></div>                       | Ski Team      |  | 4 Views  |
|                                   | Ski Team      | This is a tutorial view for training and de... | <div><div></div><div>✓</div><div></div><div></div></div> |
|                                   | Tutorial View | This will be used to learn about Yellowfin     | <div><div></div><div></div><div></div><div></div></div>  |

Add


This displays a searchable list of views currently available in the system. From here the administrator can add, edit, copy, or delete views.


See [Views](#) for more information.

Users


Search Users


People

Sample User  
Admin

System Administrator  
Admin

Job Title  
Something about myself.

Violet Southgate  
Admin

Teresa Pringle  
Admin

Product Specialist

User Import

Add

This displays a searchable list of users currently in the system. From here the administrator can add, edit, email, change role assignments, import, and delete users.

See [Users](#) for more information.

Roles

| Roles           | Members |
|-----------------|---------|
| Admin           | 5       |
| Corp Writer     | 0       |
| Report Consumer | 0       |
| Report Writer   | 0       |

Add

This displays a list of roles currently available in the system, with a count of users assigned to each. From here the administrator can add, edit, copy, and delete roles.

See [Roles](#) for more information.

User Groups

| Name           | Description                              | Status | Secure | Members |   |
|----------------|--|--------|--------|---------|---|
| Administrators | This group contains all users with th... | ✓      |        | 5       | × |

Add

This displays a list of user groups currently defined in the system, with a count of users assigned to each that you can click on to view a list. From here the administrator can add, edit, or delete groups.

See [User Groups](#) for more information.

Content Folders

Search Folders

| Content Folder | Content Sub Folder    |   |   |
|----------------|-----------------------|---|---|
| Tutorial       |                       | ✓ | × |
|                | Approval              | ✓ | × |
|                | Athletes              | ✓ | × |
|                | Camp                  | ✓ | × |
|                | Draft                 | ✓ | × |
|                | KPIs                  | ✓ | × |
|                | Live HR               | ✓ | × |
|                | Marketing & Reporting | ✓ | × |

Add

This displays a list of content categories and sub categories currently defined in the system. From here the administrator can add, edit, or delete content categories.

See [Content Folders](#) for more information.

Field Categories

| Name             |   |
|------------------|---|
| Agency           | × |
| Athlete          | × |
| Athlete Location | × |
| Athlete Payment  | × |
| Booking          | × |
| Camp             | × |
| Campaign         | × |
| Dimensions       | × |

Add

This displays a list of field categories currently defined in the system. From here the administrator can add, edit, or delete field categories.

See [Field Folders](#) for more information.

| View Categories |                  |  | ^   |
|-----------------|------------------|--|-----|
| Name            | Field Categories |  |     |
| General         | 6                |  | ×   |
| General Views   | 1                |  | ×   |
| Ski Team        | 9                |  | ×   |
|                 |                  |  | Add |

This displays a list of view categories currently defined in the system. From here the administrator can add, edit, delete, and assign/unassign field categories to/from view categories.

See [Field Folders](#) for more information.


| Org Reference Codes |  | ^ |
|---------------------|--|---|
| Name                |  |   |
| Bone Groups         |  |   |
| Booking Method      |  |   |
| Country             |  |   |
| Demographic         |  |   |
| Gender Formatted    |  |   |

This displays a list of org reference codes currently defined in the system. From here the administrator can edit an org ref code.


See [Reference Codes](#) for more information.




### Storyboard Themes




3D Theme




Keys



Pattern Orange



Side Panel



Yellowfin 7

Add

This displays a list of storyboard themes currently defined in the system. From here the administrator can add, edit, copy, or delete a theme.

See [Storyboard Themes](#) for more information.

### Content Tags

| Tag        | Usage |
|------------|-------|
| HR Reports | ×     |
| Sales      | ×     |

Add

This displays a list of content tags currently defined in the system. From here the administrator can add, edit, view usage, and delete tags.

See [Content Tags](#) for more information.

Date Filter Periods

| Active                              | Period                      | Type         |
|-------------------------------------|-----------------------------|--------------|
| <input checked="" type="checkbox"/> | Today                       | Between Date |
| <input checked="" type="checkbox"/> | Yesterday                   | Between Date |
| <input checked="" type="checkbox"/> | This Business Week          | Between Date |
| <input checked="" type="checkbox"/> | This Calendar Month to Date | Between Date |
| <input checked="" type="checkbox"/> | This Calendar Month         | Between Date |
| <input checked="" type="checkbox"/> | This Calendar Quarter       | Between Date |
| <input checked="" type="checkbox"/> | This Financial Quarter      | Between Date |
| <input checked="" type="checkbox"/> | This Calendar Year to Date  | Between Date |

Save

This displays a list of available date filter periods in the system. From here the administrator can enable/disable periods from use.

See [Date Filter Periods](#) for more information.

GeoPack Management

| Pack Name | Creation Date | Import Date | Layers    |   |
|-----------|---------------|-------------|-----------|---|
| Countries | 11-09-2014    | 21-01-2016  | - Country | × |





Add or Update GeoPack

This displays a list of available GeoPacks in the system. From here the administrator can import, edit, and delete GeoPacks.

See [GeoPack Setup](#) for more information.












## Configuration Items

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| Icon  | Item                             | Description   |
|---|----------------------------------|---|
|  | <a href="#">Configuration</a>    | This allows the user to configure a wide range of settings that fall under Email, System, Region, Authentication, and Integration categories.   |
|  | <a href="#">Content Settings</a> | This allows the user to configure a wide range of content settings and formatting defaults that fall under Report, Chart, Dashboard, Storyboard, and Browse Page categories.  |
|  | <a href="#">Images and Maps</a>  | This allows the user to load new images into the system, and define items such as raster maps, and WMS layers. Raster maps are images with each zone specified as a unique colour which defines the zones to be replaced by heat map colouring. |
|  | <a href="#">Email Template</a>   | This allows the user to customise the look and feel of system-generated emails.   |

## Administration Items

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| Icon  | Item                                 | Description   |
|---|--------------------------------------|---|
|    | <a href="#">Session Management</a>   | This allows the user to view a list of current sessions, and close selected sessions. This is useful if you have a user that has logged on from one IP address and then tries to log on from another but has been denied access.                          |
|    | <a href="#">Schedule Management</a>  | This allows the user to view and manage a list of schedules defined in the system. Schedule types include: Broadcast, Cached Filter Refresh, Cached View Refresh, Composite View Refresh, Report Refresh, Report Subscription, and Source Filter Refresh. |
|    | <a href="#">Dashboard Management</a> | This allows the user to view all available dashboards, check their status, subscriptions, and report numbers as well as having the option to edit and delete selected tabs.   |
|  | <a href="#">Licence Management</a>   | This allows the user to view the current licence parameters and usage, and upload new licences.   |
|  | <a href="#">Background Execution</a> | This allows the user to manage all report queries that are queued and currently running.  |
|  | <a href="#">Plugin Management</a>    | This allows the user to manage all plugins, including; Third Party Source Connectors, JDBC Drivers, Advanced Functions, Converters, and Custom Formatters.  |
|  | <a href="#">System Information</a>   | This allows the user to view current system information including version details, security settings, system resources and more. Sometimes support may ask you for an XML export of these details to assist with troubleshooting.                         |
|  | <a href="#">Content Translation</a>  | This allows the system to provide User Entered reporting content across multiple languages by allowing users to translate content such as Report Names, Column Titles, Chart Labels, etc.   |
|  | <a href="#">Client Organisations</a> | This allows users to view and manage a list of client organisations.  |
|  | <a href="#">Export</a>               | This allows users to export content definitions to .xml files for migration and backup purposes.  |
|  | <a href="#">Import</a>               | This allows users to import content definitions from .xml files for migration and backup purposes.  |

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