

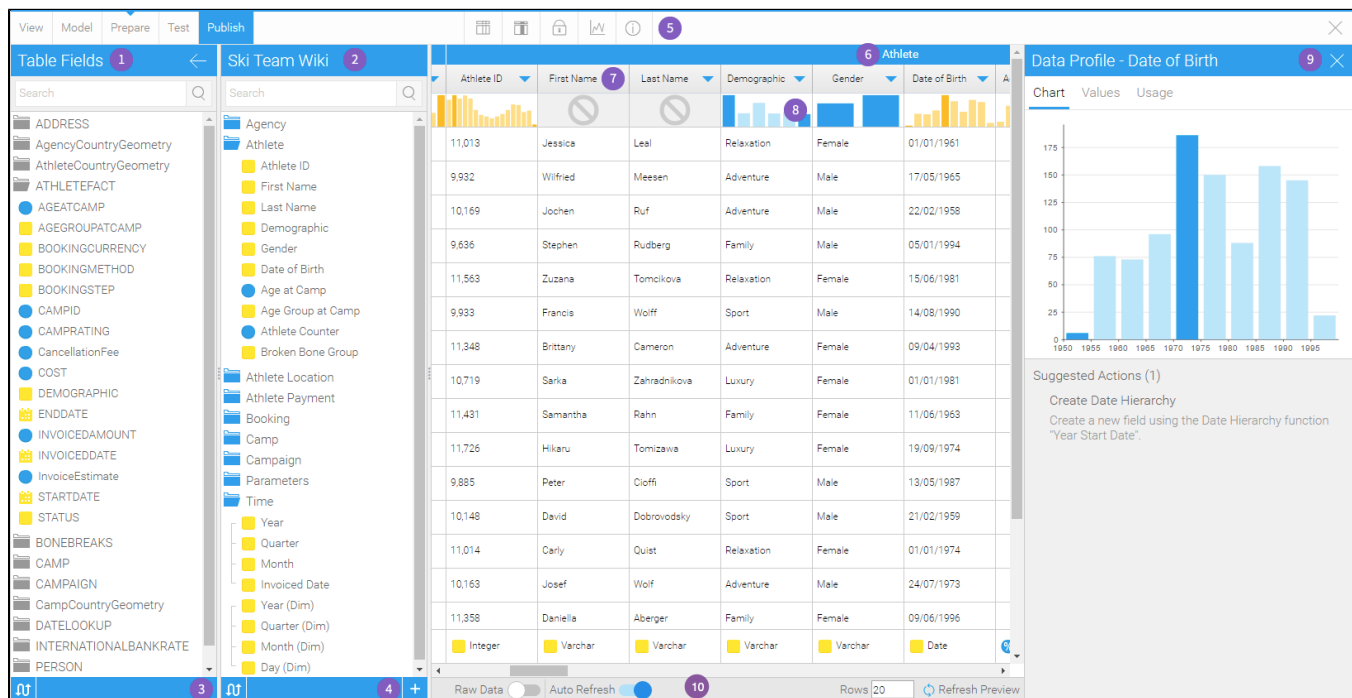
Prepare

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Overview

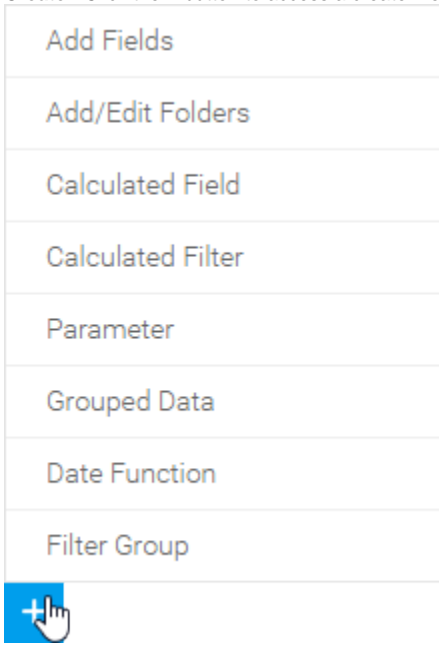
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Once a view has been defined either through the View Builder, SQL clause or straight from the database you will need to define the field definitions and apply business metadata to them.



1. **Table Fields** - Each field originally selected will initially be unattached. The process of adding fields to the view requires that metadata be applied. Drag fields from the Table Fields list to the folders you wish to apply them to.
2. **View Fields** - Fields are grouped into folders. The purpose of this is to assist end users to find the fields they require. Fields displayed in the list provide some indication of their metadata, such as; hierarchies, dimensions or metrics, and business name.
3. **Toggle** - This allows you to toggle the display of field and table names between database names and business names.

4. **Create** - Click the **+** button to access a create menu that contains the following functions:



- a. **Add Fields** - this will expand the Table Fields panel, allowing you to add new fields to the view. See [Add Fields](#) for more information.
 - b. **Add/Edit Folders** - this will open the Field Folders lightbox, allowing you to adjust the folders used to group fields in the view. See [Add/Edit Folders](#) for more information.
 - c. **Calculated Field** - this will open the Calculated Field lightbox, allowing you to build a calculation to be included in the view. See [Calculated Fields](#) for more information.
 - d. **Calculated Filter** - this will open the Calculated Filter lightbox, allowing you to build a filter to be included in the view. See [Calculated Filters](#) for more information.
 - e. **Parameter** - this will open the Parameter lightbox, allowing you to define a parameter to be included in the view. See [Parameters](#) for more information.
 - f. **Grouped Data** - this will open the Group Data lightbox, allowing you to define a field made up of groups of values based on another field, to be included in the view. See [Grouped Data \(Report\)](#) for more information.
 - g. **Date Function** - this will open the Date Function lightbox, allowing you to define a new field calculated based on a date field, to be included in the view. See [Date Functions](#) for more information.
 - h. **Filter Group** - this will open the Filter Group lightbox, allowing you to start creating a group of filters to be included as a set in the view. See [Filter Groups](#) for more information.
5. **Menu** - The menu bar contains menus that allow for metadata preparation as well as access to security and view options.



- a. **View Options** - this will give you access to a range of view details and performance options. See [View Options](#) for more information.
 - b. **Field Settings** - this will give you access to a range of default formatting and security options for each field. See [Field Settings](#) for more information.
 - c. **View Security** - this will give you access to a range of permission options related to the view and its fields. See [View Security](#) for more information.
 - d. **Data Profiling** - this will allow you to apply profiling to some or all of the fields in the view. See [Data Profiling](#) for more information.
 - e. **View Info** - this will allow you access to a range of summary information related to the view. See [View Summary](#) for more information.
6. **Folder Bar** - The blue heading bar displays the name of the field folder the fields are grouped into.
7. **Field Name** - The field name can be clicked on to rename it.
8. **Profiling Bar** - The profiling bar will display a histogram of the data profiling result. Clicking on this will open the data profile panel on the right of the screen. See [Data Profiling](#) for more information.
9. **Data Profile Panel** - The Data Profile panel shows a full breakdown of the profiling applied to the selected field. See [Data Profiling](#) for more information.
10. **Preview options bar** - The options in this bar allow you control how to preview View data on the Prepare step. Note that this does not mean these changes are saved. The options are:
- **Raw Data** - If enabled, it displays the data as it would have been returned from the database. If disabled data is displayed with formatting applied by users.
 - **Auto Refresh** - Switch this on to automatically refresh the preview panel as changes are made to the view set up, such as adding or removing columns.
 - **Rows** - Specify the number of rows to be previewed here.
 - **Refresh Preview** - If auto refresh is disabled, click on this to refresh the view data.

Add Fields

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A major process of setting up a new view and creating meta data is column definition. Using Yellowfin you can give columns sourced from your database business terminology or create new columns derived from data included in the view. This section includes information on managing and updating the columns included in your view.

Making Fields Available for Reporting

Unattached fields are grouped into their source table folders in the Unattached Field list. Click on the field name and drag it into the appropriate folder.

Note: You can add the same field multiple times into your view. This is useful if you wish to use the same field in multiple hierarchies or with different formatting applied.

If you do add the same field multiple times ensure that the business descriptions are unique – since Yellowfin needs to be able to differentiate the fields during import and export processes.

Drag Fields into Folders

Table Fields

Search

ADDRESS

AthleteCountryGeometry

ATHLETEFACT

AGEATCAMP

AGEGROUPATCAMP

BOOKINGCURRENCY

BOOKINGMETHOD

BOOKINGSTEP

CAMPID

CAMPIDRATING

CancellationFee

COST

DEMOGRAPHIC

ENDDATE

INVOICEDAMOUNT

INVOICEDDATE

InvoiceEstimate

STARTDATE

STATUS

CAMP

CampCountryGeometry

DATELOOKUP

Ski Team (Copy)

Search

Athlete

Athlete Location

Athlete Payment

Camp

Booking

Parameters

Time

11,619

11,871

9,346

9,102

11,107

11,751

11,103

12,128

10,755

9,517

12,022

12,002

9,236

Raw Data

Fields Added

Table Fields

Search

ADDRESS

AthleteCountryGeometry

ATHLETEFACT

AGEATCAMP

AGEGROUPATCAMP

BOOKINGCURRENCY

BOOKINGMETHOD

BOOKINGSTEP

CAMPID

CAMPIDRATING

CancellationFee

COST

DEMOGRAPHIC

ENDDATE

INVOICEDAMOUNT

INVOICEDDATE

InvoiceEstimate

STARTDATE

STATUS

CAMP

CampCountryGeometry

DATELOOKUP

Ski Team (Copy)

Search

Athlete

Athlete Location

Athlete Payment

Camp

Booking

Parameters

Time

11,619

11,871

9,346

9,102

11,107

11,751

11,103

12,128

10,755

9,517

12,022

12,002

9,236

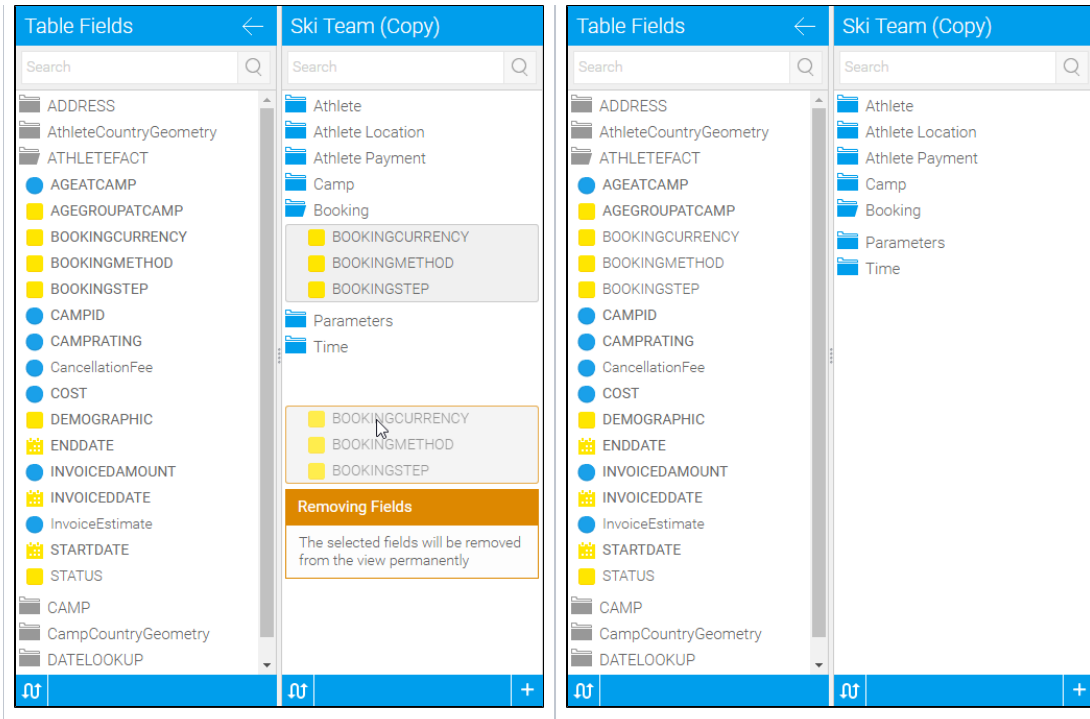
Raw Data

Removing Fields

Fields can be removed from the view by dragging them from a folder into an area that doesn't accept fields. You will know your fields are about to be removed as an orange message is displayed below them.

Drag Fields Out of Folders

Fields Removed



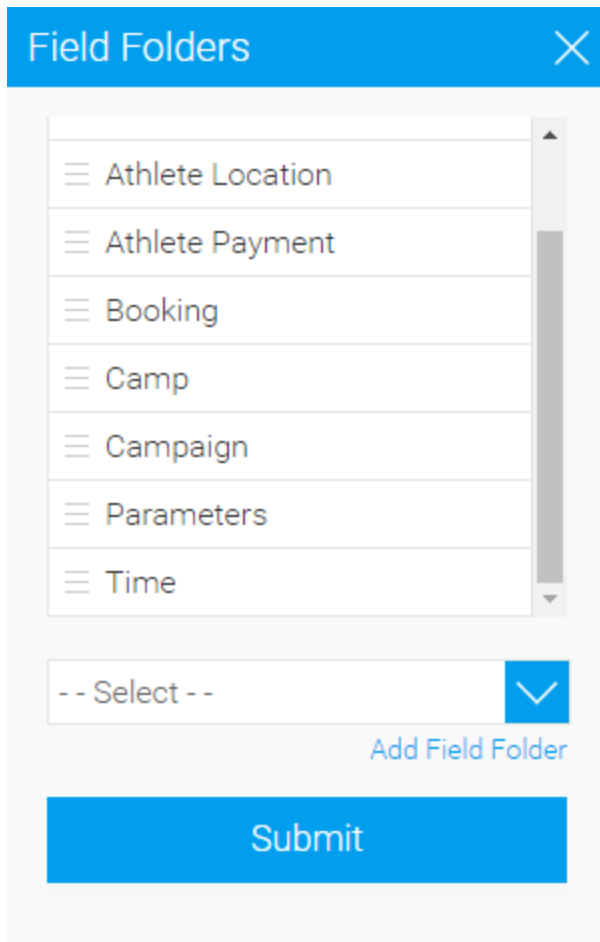
Field Folders

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Fields are categorised to assist your end users to better understand the context of the field that they are adding to a report. The categorisation allows you to group columns into particular subject areas.

Add/Edit Folders

By editing folders you can either add existing folders into the view or create brand new ones.

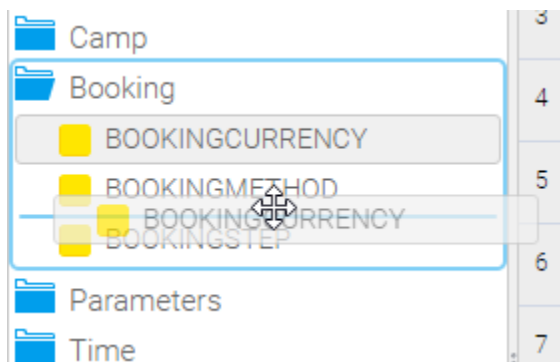


The 'Field Folders' lightbox has a blue header with the title 'Field Folders' and a close button (X). Below the header is a scrollable list of folders: Athlete Location, Athlete Payment, Booking, Camp, Campaign, Parameters, and Time. Each folder is preceded by a hamburger menu icon (three horizontal lines). At the bottom of the list is a dropdown menu with the text '-- Select --' and a blue arrow icon. Below the dropdown is a blue button labeled 'Add Field Folder'. At the very bottom is a large blue button labeled 'Submit'.

1. Click on the **Create** button, found at the bottom of the View Fields list.
2. Select the **Add/Edit Folders** option.
3. You will now see the Field Folders lightbox, which will allow you to:
 - a. Reorder the folders in the list by clicking and dragging a folder's  icon.
 - b. Remove a folder from the list by clicking on a folder's  icon.
 - c. Select an existing folder to add to the list by choosing it from the drop down list.
 - d. Add a new folder by clicking on the **Add Field Folder** link, specifying a new name, and clicking the **Add** button.
4. Either select a category from the left hand column and click the add button to add into the view subject area; or
5. Click the 'New Category' Link to display a text box for a new category. Click 'Add' when to save.
6. Once your View Subject area has all the categories required click 'save & close' to close the popup and return to the field edit page.

Field Display Order

The order in which fields are displayed in the report builder for the end user can be modified by the view administrator. By clicking on a field and dragging it above or below fields or to different folders you can change the order of the field as it will be displayed to the user when creating a report.



Note: If you are moving a field below a hierarchy of fields then a single move up or down will move the field past the entire hierarchy, not just a single field.

Field Drop Down Menu

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Each field in the view has a drop down menu with access to a range of options related to it. This menu can be accessed via two methods:

Ski Team Wiki

Search

Agency

Athlete

Athlete ID

First Name

Athlete ID

First Name

Last Name

11,013

9,932

10,169

9,636

11,563

9,933

11,348

10,719

11,431

11 726

Athlete ID

Field Type

Default Aggregation

Drill To

Rename

Edit Format

New Grouped Data Field

Link To GeoPack




Profile

Convert

Copy

Delete

The options available will depend on the type of field that has been selected. They will include a selection of the following:

- **Field Type** - this will display the type of field as an icon ( **Dimension**,  **Metric**,  **Date**), with the exception of **Metric** fields, which will allow you to change the field to a **Dimension** if required.
- **Default Aggregation** - this will allow you to specify the aggregation type that is applied to the field by default when it is added to the **Data** step of the **ReportBuilder**.
- **Drill To** - this allows you to specify how the field interacts as part of a hierarchy. See [Drill Down Hierarchies](#) for more information.
- **Rename** - this allows you to change the business name of the field, which is how it will be displayed by default in the report builder.
- **Edit Format** - this allows you to open the Field Settings menu, providing you with access to a range of default formatting options for the field. See [Field Settings](#) for more information.
- **Edit Calculation** - if it is a Calculated Field, this option will appear and allow you to edit the calculation the field is based on. See [Calculated Fields](#) for more information.
- **Edit Filter Calculation** - if it is a Calculated Filter, this option will appear and allow you to edit the calculation the filter is based on. See [Calculated Filters](#) for more information.
- **Edit Grouped Data** - if it is a Grouped field, this option will appear and allow you to edit the groupings the field is based on. See [Grouped Data \(Report\)](#) for more information.

- **New Grouped Data Field** - this allows you to create a new grouped field based on the currently selected field's data. See [Grouped Data \(Report\)](#) for more information.
- **Configure Filter Group** - if it is a Filter Group container, this option will appear and allow you to edit settings applied to the group. See [Filter Groups](#) for more information.
- **Link to GeoPack** - this allows you to link the contents of a GeoPack to the selected field. See [GeoPack Use](#) for more information.
- **Profile** - this allows you to apply Data Profiling to the selected field. See [Data Profiling](#) for more information.
- **Convert** - this allows you to apply a converter to the field to transform it in some way. See [Data Conversion](#) for more information.
- **Copy** - this allows you to make a copy of the current field.
- **Delete** - this allows you to remove the current field from the view.

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