

Our governance means data you can trust

## Release Notes

Yellowfin 7.3+  
MAY 2017

### Highlights

**With Yellowfin 7.3+, governance is front and centre.**

Yellowfin 7.3+ will empower IT to deliver trustworthy analytics throughout the enterprise with industry leading data governance, data analysts to produce better insights by connecting to more data sources and business users to embrace Business Intelligence (BI) with boundless charting options.



7.3+

**The major enhancements included in the latest version of this platform are:**

- **Better Data Governance:** Know that the right people can always access accurate insights at the right time with Yellowfin's new View approval process and Change Management Module.
- **More Data Source Connections:** Easily add, access and act on your most important information assets in a single analytics platform with Yellowfin's new range of data source connections.
- **Unlimited Charting Options:** Experience fresh and near limitless data visualization options with Conditional Canvas Widgets, new meter, dial and gauge charts, as well as integration with JavaScript charting libraries.



*"Yellowfin is already renowned for its governance capabilities. With Yellowfin 7.3+, we've extended this to enable enterprise IT managing multiple environments an even greater level of control, visibility and ultimately trust, throughout their BI platform. In addition, our new JavaScript charting capabilities have opened up a whole new world of visualization for data analysts."*

- Glen Rabie, Yellowfin's Co-founder & CEO



## AutoSelect Linked Content

Now, when primary content items are being exported, its linked dependencies will be automatically selected and included in the export file as well, saving you the trouble of searching for them and adding them individually.

Export List				
Name	Last Modified	Last Modified By	Linked Con...	Alerts
 Active Sessions	29/3/2016 2:52 PM	System Administrator	4	
Linked content				
 Data Source	Yellowfin Configuration Database			
 View	Yellowfin Usage Audit			
 Content Folder	Audit Reports			
 Sub Folder	Admin Reports			

## Smarter Warnings

Additionally, if you try to import a file which has any dependent content items not included in the import list, a warning will be sent alerting you of this issue.

Dashboard  
Storyboard  
Report   
Data Source  
View

### Warnings

Items in List **2**

Linked Content	Alerts
	 
 This Report is missing a View.	

## Universally Unique Identifier

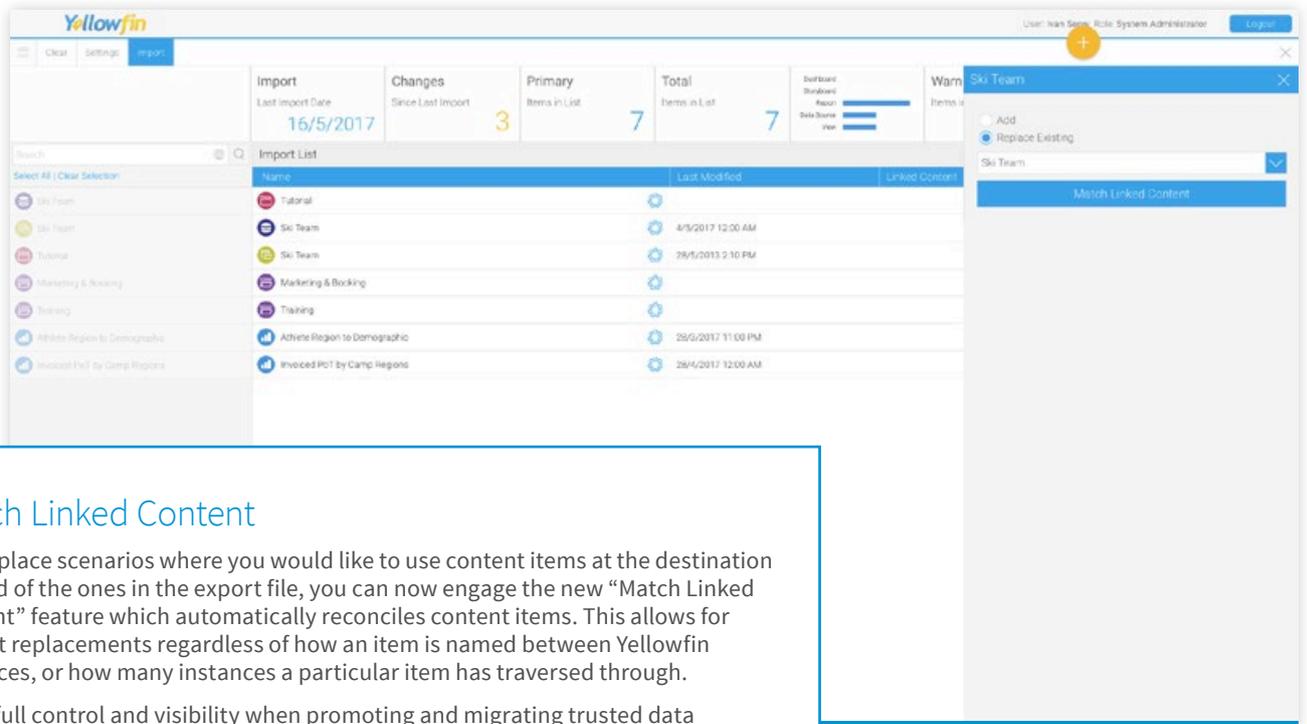
Now that each export file being imported is tracked with a UUID (Universally Unique Identifier), copying redundant content is no longer an issue. Even if the same files have different names, Yellowfin 7.3+ will identify if its content items have already been imported in the destination location and alert accordingly – saving you the hassle of having multiple copies of the same content and wondering which is the latest one!

 Athlete pay.yfx

Export file contains:

- 1 Primary Items
- 5 Dependent Items
- 2 items have already been imported from this file.**

[Change](#)



## Match Linked Content

For Replace scenarios where you would like to use content items at the destination instead of the ones in the export file, you can now engage the new “Match Linked Content” feature which automatically reconciles content items. This allows for correct replacements regardless of how an item is named between Yellowfin instances, or how many instances a particular item has traversed through.

Enjoy full control and visibility when promoting and migrating trusted data sources and BI content into your production environment.



## MORE DATA SOURCE CONNECTIONS

We all want to discover better, deeper insights with our analytics programs. But to do that successfully, you need fast access to your most important data sources. With Yellowfin 7.3+, we’re making it even easier to access, mash-up and act on all your data in one place.

Easily connect to even more data sources than ever before. Imagine the possibilities with connections to Snowflake, Apache HBase via Phoenix, and a direct connection to SAP BW’s BEx layer. Even visualize your JSON data directly in Yellowfin – pulling from APIs, government datasets or web apps – with our new JSON connector.

Satisfy all your data needs with Yellowfin 7.3+.

## UNLIMITED CHARTING OPTIONS

If you love doing something, you get better results. Analytics is no different. Discover how Yellowfin 7.3+ unlocks an unlimited range of charting enhancements that are both a joy to create and consume.

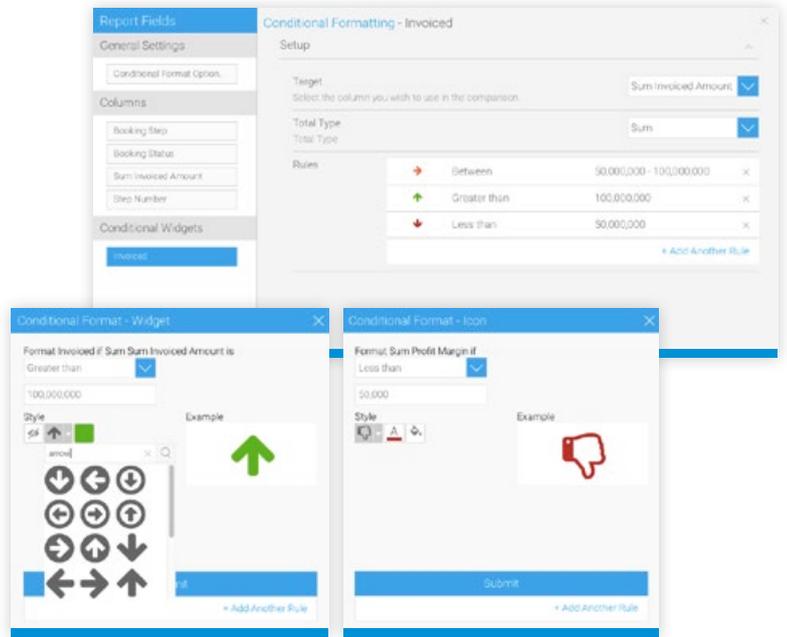
### New JavaScript Charts

Easily access and use your favorite JavaScript charting libraries within Yellowfin via the new JavaScript Chart Framework in Yellowfin 7.3+. Effortlessly integrate interactive D3 charts, Sankey Diagrams, Force-Directed Network Graphs or Google Charts into your Yellowfin dashboards. Even add your own code customizations and style them any way you like. Better yet, the JavaScript Chart Framework is directly integrated into Yellowfin’s Chart Builder, leveraging Yellowfin’s enterprise security, governance and content migration capabilities.



## Conditional Canvas Widgets

Instantly understand the current status of your live data sources with Conditional Canvas Widgets. Yellowfin 7.3+ brings Conditional Formatting functionality from Yellowfin reports into the Content Creation Canvas. Added to all text, shape, image and icon widgets, a Conditional Formatting Panel allows you to apply specific conditional formatting rules to each canvas widget. The result? All widgets included in any visualization created with Yellowfin's Content Creation Canvas can now dynamically change to reflect shifts in your data.



## Enhanced Yellowfin chart options

Refreshed meter, gauge and dial charts offer a slick new look-and-feel, along with added functionality to enable more customization and flexibility. From stylized outlines and tick labels, to new value displays, simple summarization and customized color bands and opacities for chart metrics, engaging your users just became even easier. And enhancements to thermometer charts now mean you can also create bullet graphs too.

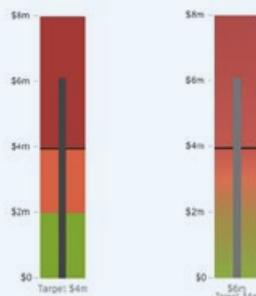
Enjoy the flexibility and freedom to visualize your data, your way. Boost user satisfaction and adoption with unconstrained new visualization possibilities. Build an analytics experience that's right for you and your team with Yellowfin 7.3+.



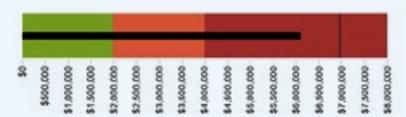
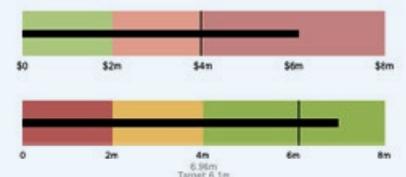
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# ENHANCEMENTS & IMPROVEMENTS

7.3<sup>+</sup>

The below table contains a complete overview of all product enhancements and additions included in Yellowfin 7.3+:

View Approvals	
Overview	Yellowfin's content approval workflow has been extended to include Yellowfin Views (metadata). This enables data preparation to be governed and managed through an authorised sign-off process before being published. This is seamlessly integrated with Yellowfin's Task Management framework which enables governance, accountability, and auditability for your data stewards, analysts and business users.
Request Approval Task	After performing self-service data preparation, publishing a Yellowfin View into a Content Folder with Approval Workflow brings up the Change Log. Users are required to indicate changes and request for approval from Expert Approvers. This raises a Task which an Expert Approver can manage before allowing the Yellowfin View to be approved for report authoring.
New Change Management - Export and Import Process	
Overview	The entire Export and Import process has been updated, making it simpler and easier to migrate and manage content across multiple Yellowfin environments. Slick new features, along with a redesigned interface, allow users to have complete visibility over content imported and exported within any Yellowfin instance in one place.
New Change Management - Export and Import Process	UUID (Universally Unique Identifier) usage has also been extended to not only content items, but to the Export File itself as well. This allows content item changes and dependencies to be automatically tracked and linked, enabling users to quickly conduct change management in an effective and efficient manner.
Export Process	
Export Status Bar	As part of the Export UI update, a new Status Bar has been introduced to the Export Process. From left to right: Last Export Date, Changes Since Last Export, Primary Items, Total Items, Item Breakdown, and Warnings.
Export Search Bar	<p>A new search bar has been introduced to allow users to quickly search for content items by name with the results being refined further as the user continues typing. Similar to the Browse Page Search Bar, the users can filter content items by type and folder location.</p> <p>Search functionality within this scenario has also been improved with an Advanced option. Advanced search allows users to search by specific Data Sources, Views, Folders, Sub Folders, and by customisable Last Modified Date ranges.</p> <p>Users also have quick access to search on History (previous exports) and Templates (re-using Export Templates created previously).</p>
Export Content Panel	
	A new Export Content Panel has been introduced which enables users to drag-and-drop content items into the Export List. Each content item type has been given a designated icon for visual clarity. Content items that been dragged into the Export List will have its background colour shaded to grey and drag-and-drop deactivated.
Export List	<p>Content items chosen for export are dropped into the new Export List. The new Export List contains 5 columns for increased tracking in change management, from left to right: Content Item Name, Last Modified Datetime, Last Modified By, Linked Content Items, Alerts.</p> <p>Content items chosen for export will result in Yellowfin automatically linking all dependent items into a single Primary item row.</p> <p>Users are also able to click on each Primary Item in this Export List and see all linked content. As part of this process, these items are also automatically validated and will alert users about discrepancies on a per item basis, hence allowing them to resolve them before proceeding with the export.</p>
Export Top Menu - Clear and Export	Users can select "Clear" to reset the entire Export process and start again. Conversely, users can proceed to export all of their content items from the Export List by selecting "Export"

Export Pop-up	<p>Clicking on “Export” results in the new Export Pop-up to appear - allowing users to give a customized Export filename and to create an Export Template.</p> <p>Depending on the content items to be exported, additional options will appear for the user such as “Include GeoPack data”, etc.</p>
Export Template	<p>Export Templates have been introduced for users who perform change management regularly. Rather than selecting many content items each time an export is done, users can simply select managed templates and Yellowfin will automatically collate the respective content items as part of the Export Process.</p>
Export .yfx File	<p>As part of the overhaul for the Export and Import process, Yellowfin 7.3+ introduces a new export file extension (.yfx). This not only contains the existing XML export/import data, but also new JSON data that enables automatic content item linking and “Match Linked Content” in the Import Process.</p>
<b>Import Process</b>	
Import File page improvements	<p>Users can now drag-and-drop their Export files (.yfx) into the page itself to start the Import process, or click into a File Selector.</p> <p>Upon loading the file, users are given an item summary on the file. If items from the file have been imported before, users will be notified as well.</p>
Import Options improvements	<p>Users are now given 3 options for the Import Process: Add, Restore, and Custom. These enhanced options now provide greater flexibility for users who might be adding new content for the first time, replacing current content, or a mix of both.</p>
Import Status Bar	<p>As part of the Import UI update, a new Status Bar has been introduced to the Import Process. From left to right: Last Import Date, Changes Since Last Import, Primary Items, Total Items, Item Breakdown, and Warnings.</p>
Import Search Bar	<p>A new search bar has been introduced to allow users to quickly search for content items by name with the results being refined further as the user continues typing. This is useful for scenarios where the Export file is very large with many content items. Users can also filter content items by type and folder location.</p>
Import Content Panel	<p>A new Import Content Panel has been introduced which enables users to drag-and-drop content items into the Import List. Each content item type has been given a designated icon for visual clarity. Content items that been dragged into the Import List will have its background colour shaded to grey and drag-and-drop deactivated.</p>
Import List	<p>Content items chosen for import are dropped into the new Import List. The new Import List contains 4 columns for increased tracking in change management, from left to right: Content Item Name, Last Modified Datetime, Linked Content Items, Alerts.</p> <p>As part of this process, these items are also automatically validated and will alert users about discrepancies on a per item basis, hence allowing them to resolve them before proceeding with the import.</p>
Import Content Item Panel	<p>During the import process, a user can click on the settings icon for each content item in the Import List. A content item panel will slide out from the right. The introduction of this new panel allows for quick access to either Add or Replace content items.</p> <p>For Replace operations, users are now given more flexibility depending on the content item type e.g for Content Folders, users now have the option of migrating folder security, or keeping the current folder security during the Import Process.</p>
Match Linked Content	<p>For Replace operations during the Import Process, users can now engage the new “Match Linked Content” feature which allows Yellowfin to reconcile content items by UUID (Universal Identifier). This allows for correct replacements regardless of how an item is named between Yellowfin instances, or how many instances a particular item has been exported/imported into.</p>
Import Top Menu - Clear, Settings, and Import	<p>Users can select “Clear” to reset the entire Import process and start again. Conversely, users can proceed to import all of their content items from the Import List by selecting “Import”.</p> <p>The Settings panel also allows users to map existing Data Sources and Content Folders on the target instance to their respective references in the Export file. Users will only need to do this once to have this effect all relevant content items during the Import Process.</p>

Import Summary Pop-up	Once the content items have been imported, a new pop-up will appear at the end of the Import process and give an Import Summary.
<b>Source Access Filters</b>	
Inverse Access Filters enhancement	Access filters for Row Level Security (RLS) have been enhanced to include a “Inverse” option for greater flexibility and providing simplicity in large user base scenarios.
<b>Visualization</b>	
JavaScript Charts	<p>A new chart type called JavaScript Chart has been introduced within the Chart Builder. This allows users to bring in external/custom JavaScript chart libraries into Yellowfin and utilize them for chart visualizations.</p> <p>In this scenario, report data and metadata are available as a JSON object for further processing within the Chart Builder.</p>
JavaScript Chart Panels	The set up for a JavaScript Chart involves 3 new panels: the JavaScript code panel, the CSS panel, and the Preview panel. Users are not only given the capability to bring in custom JavaScript code but also the flexibility of styling it whichever way they want. The Preview panel simply gives a preview into the expected chart visualization.
JavaScript Chart Panels - Code Editor	Within the Javascript Code Panel, an editor has been provided to assist the scripting process. This includes line numbers, industry-accepted colour coding for variables, comments, autocomplete for code start brackets, error messages, and much more.
Meters, Dials, and Gauge Chart Enhancements	Meter, Dials, and Gauge Charts have been refreshed and updated to include more options and settings. This allows for greater customization in chart visualizations.
Bullet Graph	As a result of the enhancements to Meters and Dial Charts, Bullet Graphs are now available in this release.
<b>Content Creation Canvas</b>	
Conditional Canvas Widget	Canvas Widgets (Shapes, Text, Icons, Images) now have Conditional Rules capability. Similar to Conditional Formatting on report data, users can now attach rules to these widgets and have them change according to shifts experienced in their data.
<b>Connectivity</b>	
More Data Sources	Yellowfin now supports native data source connectivity to Apache HBase via Phoenix and Snowflake Cloud Data Warehouse, adding more supported data sources to an already great list.
JSON Connector	A new connector for JSON data sources has been introduced to allow users to connect to JSON files, REST API endpoints, and FTP servers where streaming JSON files are kept.
Additional Connectors	New connectors for SurveyGizmo, Instagram, SugarCRM, and Facebook Ads are now introduced to the Yellowfin Marketplace.
SAP BW BEx Layer enhancement	<p>SAP BW connectivity has been enhanced to support connectivity to the BEx layer. This enhancement includes support for Attributes - users can now include these Attributes as columns during Report Building and perform calculations on them as well.</p> <p>Customizable caching has been enabled within the OLAP driver for increased performance in connectivity.</p>
<b>Report Building</b>	
Conditional Formatting on Column Totals	Conditional Formatting Rules created in Reports can now also apply to Column Totals.
Drill Through - Dashboard Linking	Users are now allowed to Drill Through to a Dashboard. This allows greater flexibility in not only passing a particular data value but also accompanying filter values to another Dashboard - extending the journey of Discovery and Analysis

User Interface	
Drill Through - Related Reports	When a user defines the drill through relationships in the Related Reports section, they can now perform advanced searches. This Advanced Search also now includes Dashboards.
Inverse Access Filters - View Column Formatting	In the Column Formatting panel for a Yellowfin View, users are now allowed to switch the “Inverse” option on/off for Access Filters.
Conditional Formatting - Column Totals	When building a report in the Report Builder, the Report Field panel now contains a “Total” section for column totals. Users are now allowed to apply Conditional Formatting on Column Totals.
Conditional Formatting - Rules Set Up	The Conditional Formatting Rule set up page has been refreshed to allow greater flexibility: users are now allowed to apply more styles (including bold, italics, underline, etc) and even see a preview of the set up before saving it.
Create Report - View Favourites	In the Create Report popup, users are now allowed to have multiple Favourite Views. These favourites are denoted with a star icon.
Browse Page - Approval Required	In the Browse Page, Views awaiting Approval are denoted with an Approval Required icon.
Browse Page - My Content	In the Browse Page, under My Content panel, users can click search for Yellowfin Views which are awaiting Approval.
Browse Page - Search Content Bar	Search Content Bar now includes a search type for Yellowfin Views
Browse Page - Approved Views	In the Browse Page, Approved Views are denoted with an Approved icon.
Content Folder - Approval Workflow	Content Folders which have Expert Approval Workflows applied are now denoted with Approval icons for clarity. This applies for any popup which involves saving content into Content Folders including Save Report and Save View popups.
Admin Console - Views	Yellowfin Views are now objects that are located in Content Folders and can be browsed to/ searched for within Browse Page. With this change, the View section is removed from the Admin Console.
Role function for Report Builder	A new role function has been introduced for JavaScript Charts.
Configuration Setting	A new security setting has been introduced for JavaScript Charts. This can also be further enabled/disable for Client Organizations (tenants)
Canvas Widgets - Options Panel	This panel includes a new section called Conditional Rules. This allows users to create conditional rules to apply for a specific Canvas Widget.
Timeline - View Approval Task	View Approvals create Tasks for Expert Approvers. These tasks will surface not only in Task Management, but also within an Expert Approver’s Timeline for management.

Our Governance Means Data You Can Trust:  
**Yellowfin 7.3+**



Want enterprise ready analytics that everyone can trust? Better insights by connecting to more data sources? Or enhanced user adoption with boundless charting options? Then try Yellowfin 7.3+ today.

Ensure IT can manage your BI environment at scale. Empower data analysts to create stunning content with confidence from your most important data sources. Give decision-makers brilliant fact-based insights upon which they can rely.

Discover why our governance means data you can trust with Yellowfin 7.3+.

[Find out more  
www.yellowfinbi.com](http://www.yellowfinbi.com)

