

Yellowfin Accelerated Training Series

Delivered by  Minerra

Course Outline

Overview

This virtually-delivered, practical course series is designed to provide participants with the knowledge and skills they need to quickly get value from using the Yellowfin Analytics Suite in their organisation. The courses are taught using an advanced online learning and collaboration platform and engaging format that combines virtual classroom sessions and practical exercises. Participants are led by experienced trainers who are experts with Yellowfin and have significant experience in the analytics profession.

Courses

The course series is split up into the following 5 courses. Participants are able to choose the entry and exit points appropriate for their skill level and job role.

- **Business User & Basic Analyst** (2 x 0.5 Days)
 - Finding and Using Analytics Content
 - Introductory Analytics Content Creation
- **Advanced Analyst** (2 x 0.5 Days)
 - Advanced Analytics Content Creation
 - Advanced Dashboards and Presentations
- **Data and Security Administrator** (2 x 0.5 Days)
 - Data Administration and Management
 - Security Architecture and Management
- **System Administrator** (1 x 0.5 Days)
 - System Administration and Management
 - Making Yellowfin Perform and Scale
- **Integrating and Extending Yellowfin** (1 x 0.5 Days)
 - Integrating Yellowfin
 - Styling and Branding Yellowfin
 - Extending Yellowfin

Objectives

This course series provides the participants with the knowledge and practical experience they need to confidently and effectively use the Yellowfin Analytics Suite in their business role.

Target Audience

This course is intended for the following types of users of the Yellowfin Suite analytics and business intelligence platform.

- **Personal / Basic Content Creator**
 - People whose primary use of Yellowfin is to create basic analytics content and/or perform basic data analysis using existing data sources and metadata views
- **Corporate / Advanced Content Creator**
 - People whose primary use of Yellowfin is to create advanced analytics content and/or perform advanced data analysis for others
- **Data and Security Administrator**
 - People whose primary use of Yellowfin is to design, create and maintain views and security of data and content
- **Yellowfin System Administrator**
 - People whose primary use of Yellowfin is to configure, maintain, monitor and manage the system
- **Developer / Product Manager**
 - People whose primary focus is to understand how Yellowfin can be integrated into a 3rd party application, branded/white-labeled, and extended/customised.

The following table summarises which module each type of user is recommended to attend:

Course Name	User Type				
	Personal Content Creator	Corporate Content Creator	Data & Security Administration	Yellowfin System Administrator	Developer / Product Manager
Business User & Basic Analyst	●	●	●	●	●
Advanced Analyst *	●	●	●		●
Data and Security Administrator *		●	●	●	●
System Administrator			●	●	●
Integrating and Extending Yellowfin				●	●

● Required module for user type

● Recommended module for user type

* Attendance of the previous course or equivalent knowledge required

Delivery Format

The courses will be delivered using a blended learning approach that combines the following teaching methods:

- Short pre-class reading or exercises to prepare participants for the virtual classroom sessions
- Live virtual classroom sessions delivered using an advanced online training and collaboration platform and dedicated Slack channel.
 - Short in-class practical exercises using small virtual breakout groups of two or three participants to collaboratively practice specific skills and techniques
 - In-class mini-projects that allow participants to combine a number of specific skills and techniques to create an example of real world analytics content

The virtual classroom sessions include frequent practical interactive sessions and short breaks. The course is taught by trainers who are experienced teachers and experts in the Yellowfin Suite and the broader analytics profession.

Duration and Structure

Each course day will involve a virtual classroom session that runs over 4 hours to maximise participant engagement and learning effectiveness. The virtual classroom will involve a combination of lectures and hands-on laboratory exercises. Please find the approximate timing for each session in the table. Please note that the start time of the sessions will depend on your region and will be specified in the email accompanying this course outline.

15 minutes before start	Virtual Classroom Opens
55 minutes	Virtual Classroom
5 minutes	Break
55 minutes	Virtual Classroom
15 minutes	Break & Coffee Chat
55 minutes	Virtual Classroom
5 minutes	Break
50 minutes	Virtual Classroom

Learning Outcomes

Business User & Basic Analyst (2 x 0.5 Days)

- **Finding and Using Analytics Content**

- Describe the core components of Yellowfin
- Navigate the Yellowfin interface
- Find and access existing analytics content on Yellowfin
- Answer business questions by interacting with and exploring existing analytics content on Yellowfin
- Answer business questions using Assisted Insights
- Respond to business insights identified by Signals
- Collaborate with colleagues about business questions with analytics content using annotations, timeline, tasks and comments.
- Use actions to share existing analytics content with others.

- **Introductory Analytics Content Creation**

- Create tabular reports with filters aggregations, calculations, functions, sections, drill-downs and conditional formatting
- Create data visualisations using Auto-Chart or selecting standard charts.
- Format tabular reports and data visualisations
- Create dashboards using existing reports and data visualisations
- Create interactive data presentations using existing reports and data visualisations
- Create narrative data stories using existing reports and data visualisations

Advanced Analyst (2 x 0.5 Days)

- **Create Advanced Analytics Content**

- Create complex tabular reports using sub-queries.
- Create complex reports with advanced filtering, complex calculations, and conditional formatting.
- Create complex reports using sparklines and various statistical advanced functions
- Create complex charts including geographic charts, statistical charts, time series, combination charts and more
- Create complex multi-chart reports by combining various charts, text labels, buttons and icons.
- Use Assisted Discovery to automatically analyse data to identify important and relevant insights.

- **Create Advanced Dashboards and Presentations**

- Create complex dashboards using sub-tabs, linked filters, series selection, action buttons, widgets, code mode.
- Create comprehensive presentations and presentation templates

Learning Outcomes

Data & Security Administrator (2 x 0.5 Days)

- **Data Administration and Management**

- Connect to various types of data sources
- Create data transformations to integrate and clean data
- Create and configure view metadata models
- Create and configure automated insights and signals

- **Security Architecture and Management**

- Create a user and content security model using user groups, user roles and content permissions.
- Implement row-level and column-level security
- Understand how multi-tenancy can assist the management of security in conjunction with row-level filtering or database switching

Yellowfin System Administrator (1 x 0.5 Day)

- **System Administration and Management**

- Monitor the use and performance of a Yellowfin system.
- Manage licence keys, sessions, and content.
- Create a reliable backup process for the Yellowfin system
- Configure core system and content settings
- Perform troubleshooting, find system information and log files, and submit community tickets.
- Migrate content between environments
- Report on Yellowfin usage

- **Making Yellowfin Perform and Scale**

- Understand the Yellowfin deployment options
- Configure Yellowfin in a clustered environment
- Monitor, tune and optimise Yellowfin performance

Integrating and Extending Yellowfin (1 x 0.5 Day)

- **Integrating Yellowfin**

- Plan to implement Yellowfin with a custom application
- Understand custom application integration options
- Understand how to embed Yellowfin and Yellowfin Content

- **Styling and Branding Yellowfin**

- Implement content restyling to meet end-user brand and style requirements.

- **Extending Yellowfin**

- Understand how custom visualisations can be created with Javascript charts
- Understand how interactive Yellowfin dashboards can be created using code mode, code widgets and action buttons
- Understand how Yellowfin can be extended with custom connectors, formatters, transformation steps, functions, converters, advanced functions