

## Upgrade Management

Upgrading to the latest version offered by Yellowfin comes with many benefits, but there are user and system impacts that must be considered to ensure a smooth upgrade experience. Done right, you look like a rock star and your users get the latest tools at their fingertips. The goal of this document is to point out changes you should focus on to help you manage the change impact to your organization.

Start your upgrade project by reviewing the latest Yellowfin release notes from the website and community. This is the first place to start to get an idea of the system and user impacts that you will need to plan for as you prepare for your upgrade. If after a thorough review of the release notes and this document you feel you need additional help, reach out to our support team for some friendly advice.

### What are the biggest impacts moving to v7.3?

As the admin, or the upgrade project manager, you will need to understand the impact the upgrade will have on the day-to-day usability of the Yellowfin product, as well as the training needs of your team to ensure all users get the most out of your Yellowfin investment.

Depending on the version you are upgrading from (6 or 7 series) you will find significant changes in the day-to-day usage of the system. Specifically, if you're an analyst you'll notice how powerful 7.3 is with assisting you in conducting faster data analysis and creating more trustworthy, stunning Business Intelligence content in less time.

Depending on your role (Business User, Analyst, or Administrator) you will find the chart on the next page a quick reference guide to help you consider the training plan each user should consider. Yellowfin offers free on-line technical training through [university.yellowfin.bi](http://university.yellowfin.bi), a vibrant community to help answer your product questions.



#### Document Focus

*change impact across the following user types:*










- Analyst
- Admin
- Business User

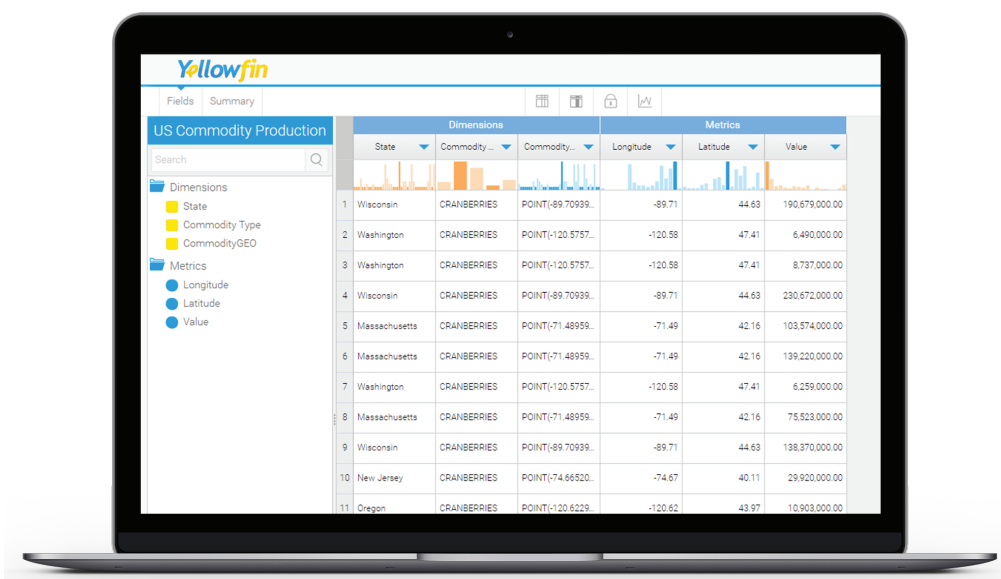
#### Key Resources:

- Yellowfin Community
- Yellowfin University
- Yellowfin Wiki
- Yellowfin Weekly Tips & Tricks Email

## User Impact

## Areas that have changed that will impact user experience and upgrade success

New Functionality	Business User	Analysts	Administrator
<b>Data Preparation:</b> Built into Yellowfin's BI platform, a new Data Preparation Module will empower you to integrate, and then act on, more data sources in less time. Maintain governance and ensure repeatability in your data preparation processes with best practice metadata modeling and unique data profiling capabilities.			
<b>Set Analysis:</b> Quickly create comparative visualizations in a few simple steps using Yellowfin's Set Analysis function. Easily define and compare a subset of data values, within a selected data set, via intuitive point-and-click navigation.			
<b>New Content Creation Canvas:</b> Enjoy the flexibility and freedom to quickly create customized analytical content and infographics with Yellowfin's overhauled Content Creation Canvas. No coding required.			



## Preparing for your upgrade

### Key Steps:

Upgrade requirements can vary greatly depending on your individual environments. An upgrade may require little planning, or it could require coordination from several different parties and involve a multi-tiered, clustered enterprise environment.

Here are some best practices to consider:

- ☐ Review the release notes and understand the impact to your users, individual environments, and the upgrade timeline you want to achieve.
- ☐ Define your upgrade validation and launch plans, things like:
  - ☐ Install the latest release into a test environment:
    - While Yellowfin undertakes rigorous testing before every release, we recommend some level of regression testing done as part of your upgrade plans. Testing can include a check of:
      - Content (reports/dashboards/views/storyboards)
      - Connections
      - Schedules / broadcasts
      - Security (interaction with security frameworks such as AD or LDAP)
      - Interactive functions (drill, filters, sliders, etc)
      - Styling



#### Style Sheets:

If you're upgrading from v7.2 or older, you'll need to rebuild any custom styling as part of your migration to v7.3

- ☐ Have a group of users (Business Users, Analysts, Admins ) spend time reviewing the release notes, changes to the interface, business workflows, collaboration, new charting, and the impact to any customization to ensure a smooth upgrade.
- ☐ From your user feedback testing, define your general user training requirements:
  - Yellowfin University user certification program is geared to help all users understand the basic workflows within Yellowfin. The basic training is free and all Yellowfin users are encouraged to expand their knowledge: <http://university.yellowfin.bi/>
    - Build your teams Yellowfin Guru skills with Yellowfin University Certification programs
  - Make sure that all users know where to find the latest Yellowfin resources:
    - Release notes
    - Wiki
    - Yellowfin Community: <http://community.yellowfin.bi/>
      - Join the Yellowfin community and review the latest lessons learned, the latest posts related to v7.3, and help provide product feedback.
    - Sign up for weekly tips and tricks video email series: <http://learn.yellowfin.bi/>
    - Public webinar series offered monthly by the Yellowfin team: Follow [@YellowBi](#) on Twitter
- ☐ Do you have your own custom collateral, user materials, and/or marketing items that need to be updated for your end user groups?
- ☐ Consider holding your own user group launch webinar to help focus trainings around specific user workflows and questions.

When you have completed your internal review and beta of the latest Yellowfin software version, including taking the time to isolate potential environment, user, and system impacts, you are ready for a smooth upgrade experience. In basic terms, an upgrade involves four steps:

## 1. Preparation starts with a good back plan

- ☐ Backup your current Yellowfin configuration database.
- ☐ Backup any modified style sheet and image files.
- ☐ Backup any custom program files.
- ☐ Ensure Yellowfin has been shut down prior to running the upgrade application.

## 2. Download Latest Installer

- ☐ As a customer, you should have access to the customer portal. Simply login to access the files needed for the upgrade.

## 3. Run Installer

- ☐ As a customer, you should have access to the customer portal. Simply login to access the files needed for the upgrade.

## 4. Test Upgraded Instance

- ☐ Test the environment for content and interactivity. While Yellowfin undertakes rigorous testing before every release, we recommend some regression testing done by the customer during your validation process.
- ☐ Testing can include a check of:
  - ☐ Content (reports/dashboards/views/storyboards).
  - ☐ Connections
  - ☐ Schedules / Broadcasts
  - ☐ Security (interaction with security frameworks, such as AD or LDAP)
  - ☐ Interactive functions (drill, filters, sliders, etc)
  - ☐ Styling

The benefits of having a consistent upgrade and user experience impact plan can be measured in many ways but the end objective is to ensure little to no impact on your user base.

Yellowfin is committed to the continuous improvement of our product quality, industry leading functionality, and the services to support our customers through our dedication to our passion, connecting people to their data.