

Change Management

Yellowfin 7.4



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The previous versions of Yellowfin's BI platform are amazing tools for business analysis that tell you what happened. However, Yellowfin 7.4 takes you a step ahead by explaining Why something happened. Upgrade to the latest version to experience new functionalities, such as automated insight discovery, advanced analytics with data science models, data transformations, as well as heightened existing features.

This document contains important information to allow you to plan, prepare, and perform system upgrade tasks.

Before upgrading your platform, review the latest release notes from the website and community. This will be a starting point in getting an idea of the system and user impacts that you will need to plan for as you prepare for your upgrade. If you still need additional help after reviewing the release notes and this document, feel free to reach out to our support team for some friendly advice.

Yellowfin users most impacted by the latest version:

- Business users
- Data analysts
- Data scientists

Key Resources:

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

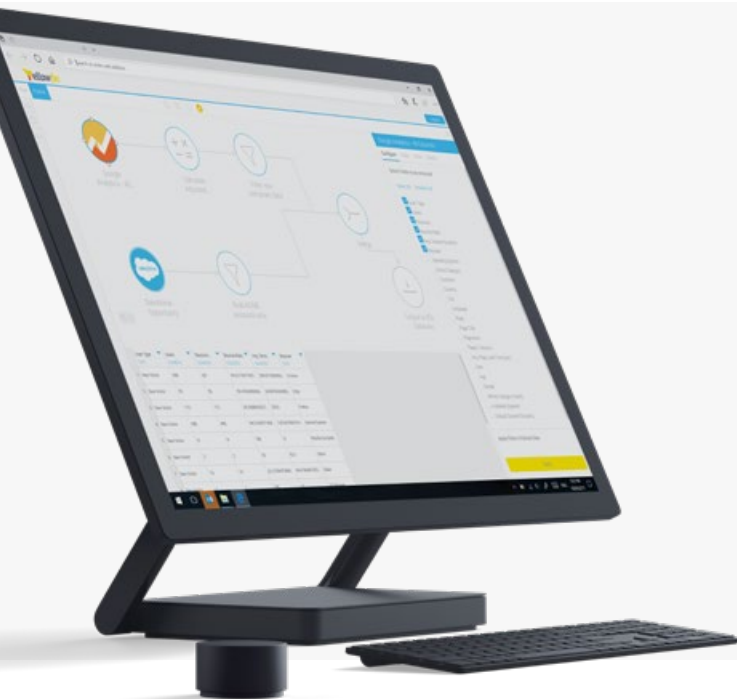
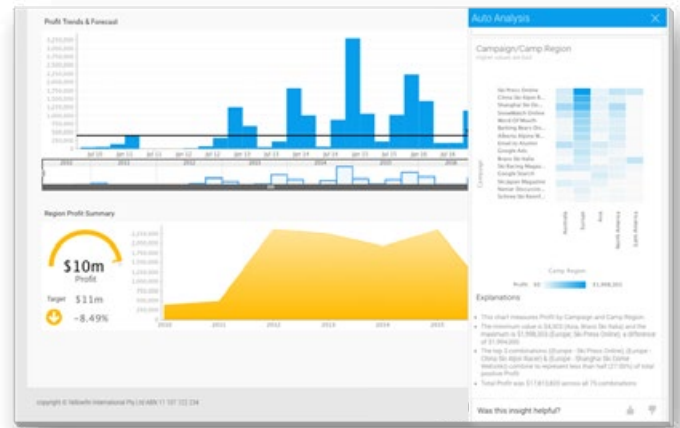
Biggest impacts in Yellowfin 7.4

Here are some of the new features to enjoy in the latest update that includes something for all types of Yellowfin users.

Assisted Insights

With the introduction of an automated insight generating functionality, business users will no longer need to rely on a data analyst to explain their business data to them. Yellowfin charts can now be auto-analyzed to either explain a data point, or compare two data points. This analysis results in auto-generated insights in the form of charts and their written narratives. Not only that, carrying out this task is extremely easy. Simply right-click on a chart's data point and select the Auto Analyze option.

Data analysts will also get to experience an edition of system-generated insights integrated into the report builder module. Choose data that requires analysis, and using a new Smart Analysis button, bring up the Insight Wizard, which inquires the type of result that you want to see, and then generates automated charts, along with their written explanations in simple, natural language.



Data Transformations

A new module has been introduced in version 7.4, that allows for data to be extracted from a data source of any type, apply transformations on it, and then loaded back into a database. Users usually require an additional ETL tool for this type of functionality, but v7.4 provides it for no additional cost.

Capturing the essence of Yellowfin's user-friendly modules like the report builder and the chart builder, this one is just as easy and convenient to use with a drag-and-drop user interface.

Not only are there different methods of extracting data and transforming them already included within this module, but additional transformation widgets can also be downloaded from our Marketplace (free of cost!) and installed on the system.

Data Science Productionization

As a data scientist, you're probably using another software to retrieve data from your BI platform, apply a data science model to it, and then import the predictions and results that it generates back into the platform. The new Yellowfin update eliminates all these additional steps; now you can simply pull in your advanced analytical and data science models directly into Yellowfin, and generate the results that it's designed to produce, on your data. Our platform currently supports multiple data science model outputs such as PMML, H2O.ai, PFA and R. This functionality is supported in the new data transformation module, and also through the report builder's advanced function.



Preparing for your upgrade

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.



Enhancements to existing features

The upgrade will provide additional intuitiveness and ease of use with enhancements made to features such as additional chart builder settings, informative tooltips, and an interactive upgrade to the activity panel.

Consider these best practices:

- 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, that is:
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 v7.4.
- Have a group of users (business users, data analysts, administrators) 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.yellowfinbi.com/>
- 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: <https://www.yellowfinbi.com/platform>
- Wiki: <http://wiki.yellowfin.com.au/>
- Yellowfin Community: <http://community.yellowfinbi.com/>

Join the Yellowfin community and review the latest lessons learned, the latest posts related to v7.4, and help provide product feedback.

- Sign up for weekly tips and tricks video email series: <http://learn.yellowfinbi.com/>
- Public webinar series offered monthly by the Yellowfin team: Follow @YellowfinBi on Twitter
- Take into consideration 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.

Key Steps:

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. Prepare with a good backup plan:

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

2. Download the latest installer:

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

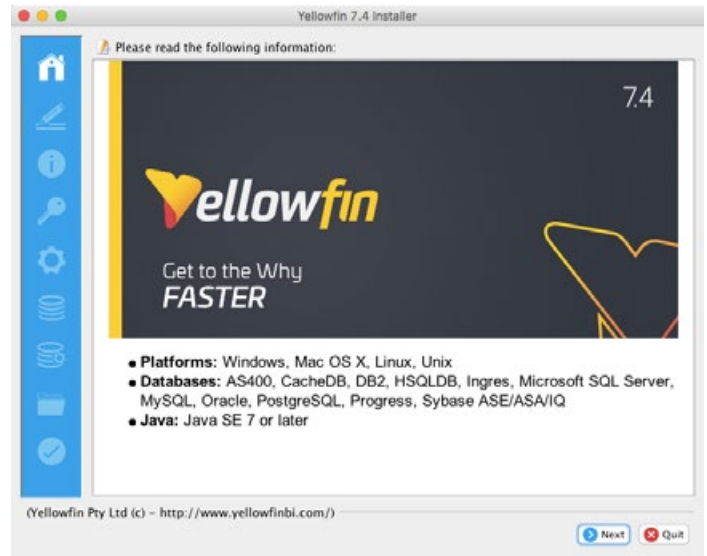
3. Run installer:

- Run the upgrade installer. The wizard will guide you through the entire process.

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/transformation flows)
 - Connections
 - Schedules / Broadcasts
 - Security (interaction with security frameworks, such as AD or LDAP)
 - Interactive functions (drills, 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.



Need help planning your upgrade? Contact your Customer Success Manager to find out more about how the team at Yellowfin can make your upgrade process as seamless and risk-free as possible.

Introducing Yellowfin 7.4:
Smart BI for faster, better insights.

There are a lot of analytics tools in the market today that provide good dashboards, but they're not very good at explaining what caused those results.

To arrive at that insight, a business user either asks a data analyst what happened or do their own self-service analysis.

Fortunately, Yellowfin now provides automated help so the whole business gets to the Why faster.

Find out more
www.yellowfinbi.com

