Yellowfin

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 functionalities at their fingertips. The goal of this document is to highlight changes you should focus on to help you minimize impact to your organization.

Start your upgrade project by reviewing the latest Yellowfin release notes from the website. 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 v7.2?

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 to the day-to-day usage of the system. More importantly, you will find our new collaboration and data quality task features will help to increase user adoption while uniting business workflows in new and exciting ways.

With Yellowfin University, you and your team can learn and explore recommended best practices and better understand the new features within v7.2 online and at your own pace. Access the university through the Yellowfin portal or directly at: http://unversity.yellowfin.bi.

Document Focus
change impact across the following user types:
- Business User
- Analyst
- Admin

Key Resources:
- Yellowfin University
- Yellowfin Wiki
- Yellowfin Community
- Yellowfin Weekly Tips & Tricks Email

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User Impact Chart for v7.2aa

Areas that will impact end-users experience and upgrade success

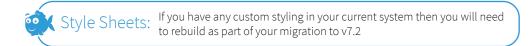| New Functionality	Business User	Analysts	Administrator
Business workflow changes: Task management / Task list views / Kanban BI project management / Discussion lists / Smart task logic and broadcasting / Collaborative data quality management	✔	✔	✔
API Connectors: Open connector framework / Pre-Built connectors / Pre-Built content / In-Memory aggregation / Creating a report from a report	✔	✔	✔
Report Forecasting & Trending Tools: New forecasting tools / Trend Analysis tools / Average plotting	✔	✔	✔
User Interface Elements: New source connection page / New report info pop-up / New date picker / New broadcast pop-up / Updated user admin page / New save page / Restyled view builder	✔	✔	✔
Collaboration Features: New comment pop-up / New share pop-up / Improved activity stream / Community side panel / New comments stream panel / Discussion upgrades / New create & save discussion page / Improved Timeline upgrade	✔	✔	✔
Filter Changes & Customizations: Improved filter options / Filter Formatting / New Filter Panels / Enhancements to filter and drill breadcrumbs / New filter value search pop-up / New filter define value pop-up / Source filter pop-up / Data dimention filters	✔	✔	✔
New Content Creation Workflow: New source connection pop-up / Initiate View / Initiate Report	✘	✔	✘
Improved User Experience Items: New left side navigation menu / New browse page / New PDF exporter / New report queuing / New chart render options / New dashboard management admin page / Improved dashboard tab subscriptions / Improved user search / New image loader / New folder pop-up / Improved plug-in manager	✔	✔	✔

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.

☐ 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 have any custom styling in your current system then you will need to rebuild as part of your migration to v7.2

☐ 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:

- The Yellowfin University 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 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 lessons learned, the latest posts related to v7.2, 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: http://www.yellowfinbi.com/YFCommunityNews.i4

☐ 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.

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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. 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

☐ Simply login to the customer portal access for the files needed for the upgrade.

3. Run Installer

☐ Follow the installer lead prompts for an effortless install.

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

Having a consistent upgrade and user experience impact plan is critical to ensure minimal disruption to your user base.