



Release Notes

Yellowfin 7.2

March 2016

Highlights

Connecting people and their data

Yellowfin 7.2 is a modern Business Intelligence (BI) platform that connects people and their data. Explore Yellowfin 7.2 and discover the broadest, most shareable BI platform on the planet.

Yellowfin 7.2 introduced new technical capabilities in three core areas, including:

- **The Business Workflow:** The Business Workflow introduces a new framework, to facilitate task management and analytic workflow processes, that enables superior collaboration between data analysts and business users within the BI platform.
- **API connectors:** Yellowfin 7.2 ships with an 'open' connector framework, enabling users to connect to, visualize and act on data from any third-party Web-based application. Yellowfin 7.2 also delivers a range of API connectors for third-party Web applications out-of-the-box, which include pre-built best practice BI content.
- **Forecasting and trend analysis:** Improved forecasting and trend analysis extend the breadth of Yellowfin's predictive capabilities, facilitating better, faster data analysis. Understand where your business is heading with Yellowfin 7.2.

Make your data more accessible, valuable and actionable – for everyone.

Business Workflow: Driving in-platform collaboration and user adoption

"The unique Business Workflow framework in Yellowfin 7.2 empowers business users and data analysts to work collaboratively to produce better business insights. Crucially, it also enables the entire data-driven decision-making process to take place in the BI platform – where it belongs."

– Yellowfin co-Founder and CEO, Glen Rabie

Yellowfin Business Workflow

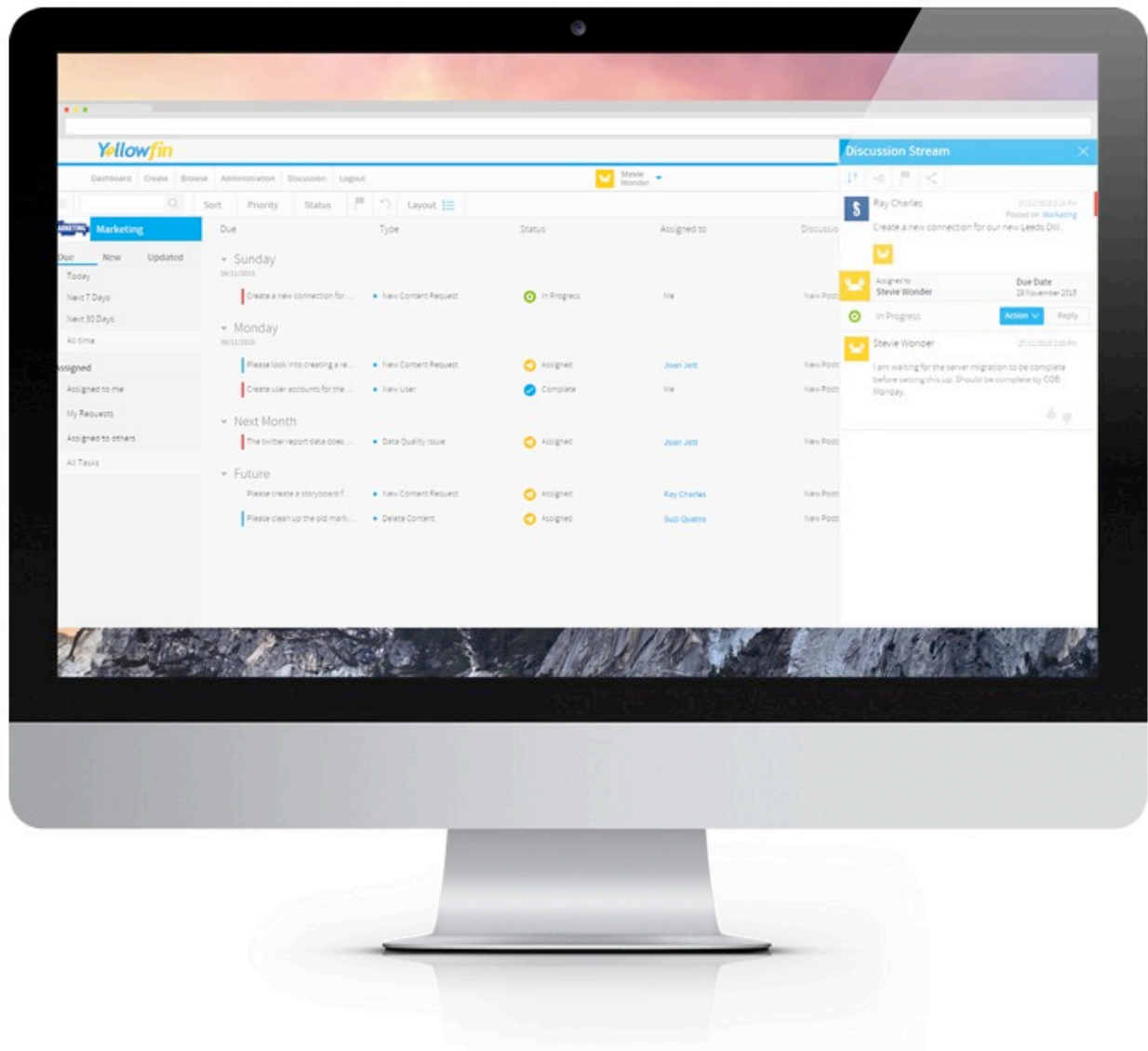
The Yellowfin Business Workflow provides a clear path and process for business users to directly connect with the BI and data experts in their organization, to raise trackable tasks and data quality issues, brainstorm ideas, collectively review content and take better, faster data-driven action.

Yellowfin's Business Workflow boosts business user adoption by enabling those users to actively participate in the entire data-driven decision-making process. Business users get the BI content they need, without having to turn into overnight BI experts or data analysts. This way, business users can work together with data experts to ensure the best business insights are delivered, allowing them to make better and faster decisions, while concentrating on their core job function.

Yellowfin Business Workflow delivers a unique collaborative method for improving task management and analytic workflow in order to connect business users with business analysts. Features include:

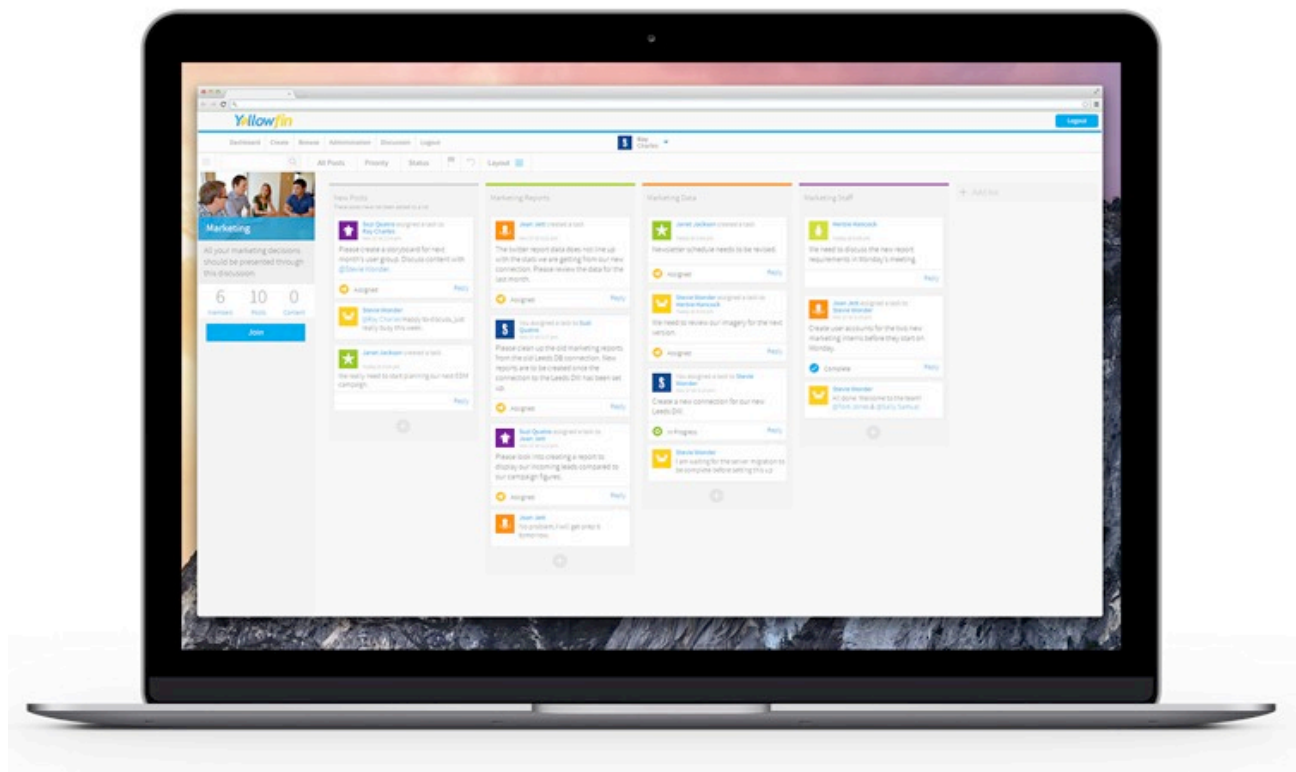
Task Management

Yellowfin's new Task Management system gives business users the power to raise and assign tasks from anywhere inside the Yellowfin BI platform. Request, track and review analytic content or analysis before publishing and sharing. Yellowfin's Task Management system quickly connects business needs with BI experts in the organization, while giving users complete visibility over task progression – from creation through to completion.



Discussion Lists

Plan BI projects inside Yellowfin's BI platform with Kanban style Discussion Lists that allow data analysts and other BI users to brainstorm ideas, organize responses to tasks and manage projects. Yellowfin Discussion Lists also enable users to visualize and organize workflow into Activity Streams to boost transparency, enabling users to easily monitor and communicate progress.



Smart Tasks

Yellowfin Smart Tasks improve accountability and instantly turn insight into action by automatically generating tasks from Yellowfin broadcasts. If data falls outside predefined thresholds, a task is instantly created, assigned and given a deadline for completion.



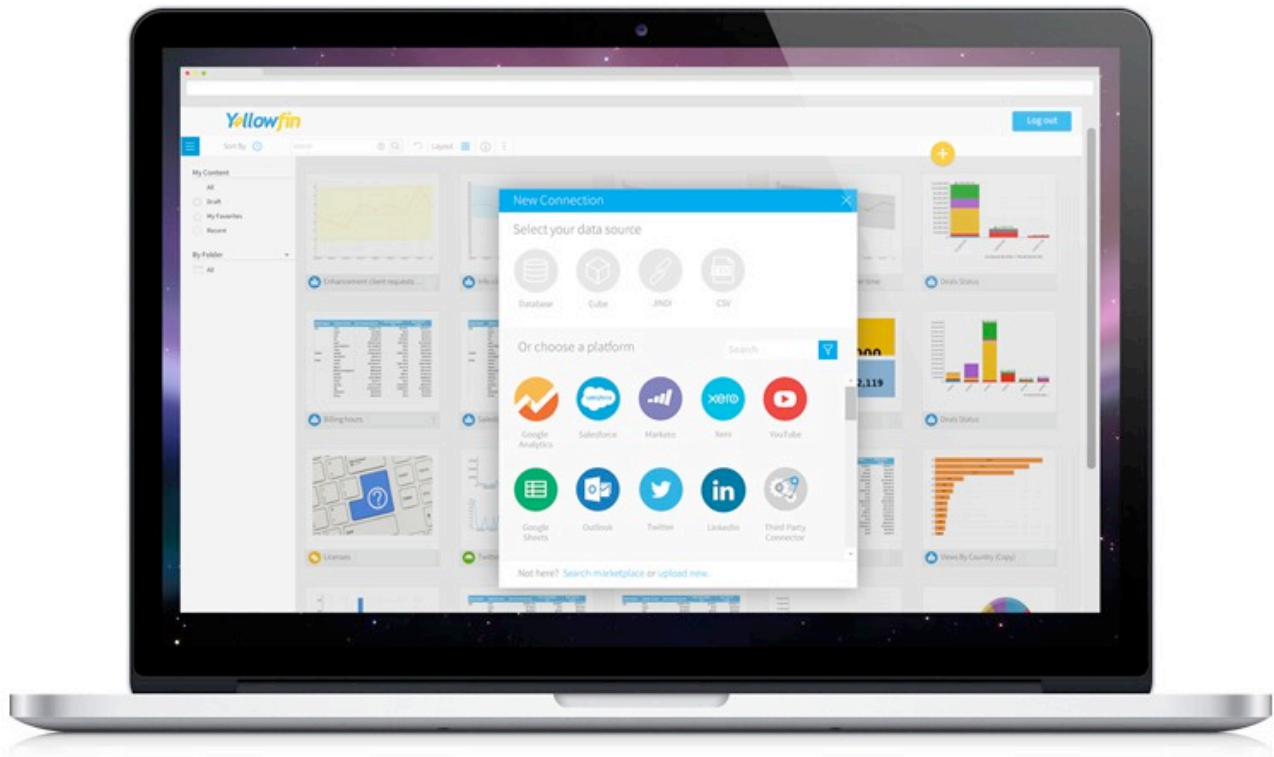
Flag data quality issues

Trust in your data and BI platform is critical to enable strong user adoption and engagement. Yellowfin 7.2 empowers users to flag data quality issues with in-platform screenshots and annotations. Ensure your data and analytic content is more trusted than ever with Yellowfin 7.2.



Connectors

Connecting to your favorite Web applications is now as easy as connecting to your on-premise databases. Be empowered to create, share and act on analytical insights from your most important third-party Web applications.



Open connector framework

Yellowfin 7.2 includes an 'open' connector framework, enabling clients to quickly and easily build custom API connectors for any third-party Web application. Organizations can then connect those applications straight to Yellowfin to visualize relevant data via stunning charts, reports and dashboards. This allows users to connect to, understand and act on data from any third-party Web-based application within Yellowfin.

Pre-built connectors

Yellowfin 7.2 also ships with a range of out-of-the-box API connectors, enabling users to quickly uncover analytical insights from a range of common third-party Web applications, including Google Analytics, YouTube, Google Sheets, Twitter and more. The Yellowfin team will progressively add more free connectors to the Yellowfin Marketplace over time.

Many of Yellowfin's out-of-the-box connectors will enable users to analyze data from popular social media applications and marketing platforms.

"Marketing is becoming an increasingly data-driven industry. Yellowfin's API connectors can assist marketers to quickly analyze the impact of a raft of marketing activities and social media campaigns to demonstrate return on investment."

– Yellowfin Director of Product Marketing, John Ryan

Pre-built content

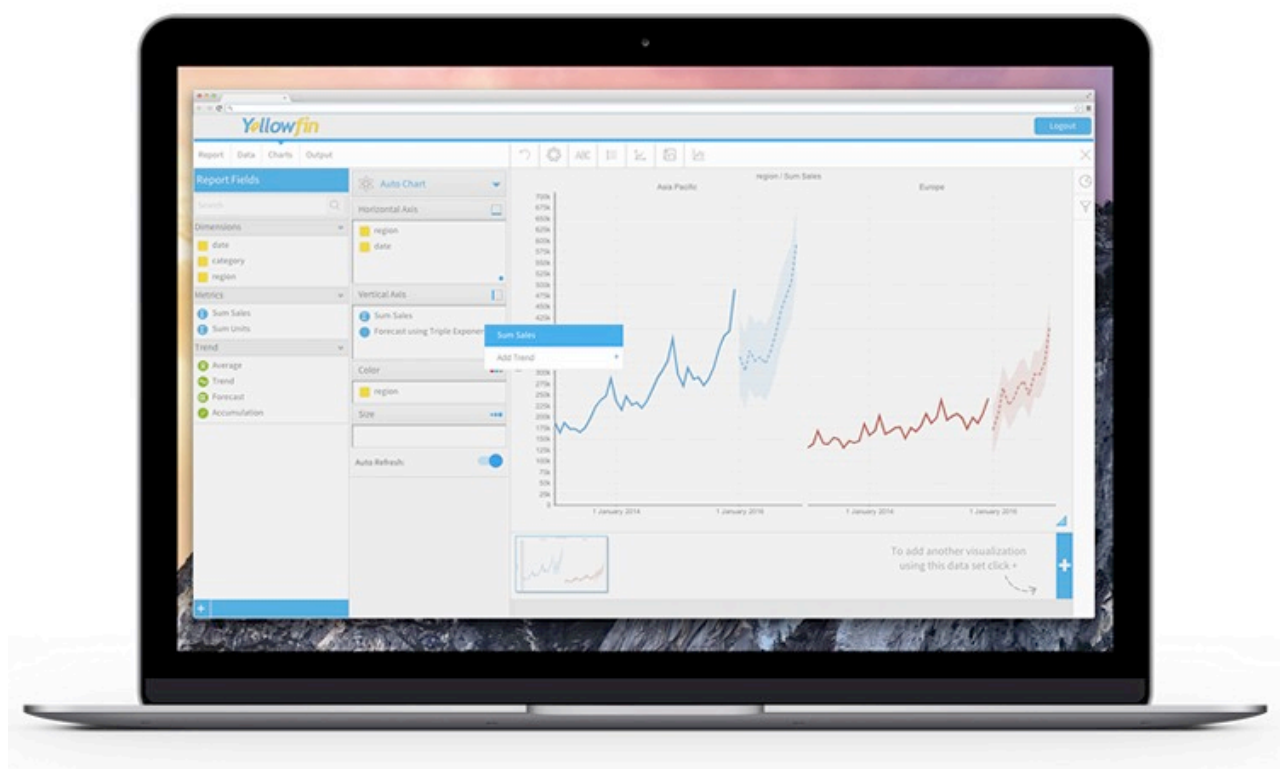
Yellowfin 7.2 ships with pre-built best practice reports and dashboards for its range of out-of-the-box connectors. Simply connect to your favorite Web applications to gain instant insights. Or, easily explore and create your own custom insights and dashboards.

Forecasting and trend analysis

New forecasting and trend analysis functions introduce predictive analytics features to Yellowfin, extending the breadth of Yellowfin's analysis capabilities. Conduct better, faster data analysis by visualizing trends and projecting forecasts in Yellowfin 7.2.

"Demand for predictive analytics is quickly growing as it becomes increasingly important for organizations to use their data assets to pinpoint trends and conduct accurate forecasting. Yellowfin 7.2 will deliver enhanced forecasting and trend analysis capabilities, making it easier for users to understand where their business is heading."

– Yellowfin co-Founder and CEO, Glen Rabie



Forecasting

Add forecast models in Yellowfin 7.2 to visualize and predict what will happen next. Users can perform faster, more accurate forecasting by easily setting the parameters used to create a forecast model in Yellowfin.

Trend analysis

New trend analysis functionality in Yellowfin 7.2 enables users to easily plot the relationship between two variables on a chart to instantly identify trends. Effortlessly uncover patterns in your data to reveal your next big business opportunity with Yellowfin.

Averages

Users can now automatically plot an average value on a chart by simply selecting to show an average for a particular metric. Easily display the mean, median and mode on charts.

Enhancements and improvements

An overview

The below table contains a complete overview of all product enhancements and additions included in Yellowfin 7.2:

Yellowfin Business Workflow	
Business Workflow: An overview	<p>The Business Workflow introduces a new framework, to facilitate task management and analytic workflow processes, that enables superior collaboration between data analysts and business users within the BI platform.</p> <p>The Yellowfin Business Workflow provides a clear path and process for business users to directly connect with the BI and data experts in their organization, to raise trackable tasks and data quality issues, brainstorm ideas, collectively review content and take better, faster data-driven action.</p> <p>Yellowfin's Business Workflow boosts business user adoption by enabling those users to actively participate in the entire data-driven decision-making process. Business users get the BI content they need, without having to turn into overnight BI experts or data analysts. This way, business users can work together with data experts to ensure the best business insights are delivered, allowing them to make better and faster decisions, while concentrating on their core job function.</p> <p>Yellowfin Business Workflow delivers a unique collaborative method for improving task management and analytic workflow in order to connect business users with business analysts.</p>
Task Management	<p>Yellowfin's new Task Management system gives business users the power to raise and assign tasks from anywhere inside the Yellowfin BI platform. Request, track and review analytic content or analysis before publishing and sharing. Yellowfin's Task Management system quickly connects business needs with BI experts in the organization, while giving users complete visibility over task progression – from creation through to completion.</p>
Task Lists	<p>Yellowfin's new Task Management system also includes Task Lists, enabling users to see and manage all tasks – with which they are associated – in a single place.</p>
Discussion Lists	<p>Plan BI projects inside Yellowfin's BI platform with Kanban style Discussion Lists that allow data analysts</p>

	and other BI users to brainstorm ideas, organize responses to tasks and manage projects. Yellowfin Discussion Lists also enable users to visualize and organize workflow into Activity Streams to boost transparency, enabling users to easily monitor and communicate progress.
Smart Tasks	Yellowfin Smart Tasks improve accountability and instantly turn insight into action by automatically generating tasks from Yellowfin broadcasts. If data falls outside predefined thresholds, a task is instantly created, assigned and given a deadline for completion.
Flag data quality issues (screenshots)	Trust in your data and BI platform is critical to enable strong user adoption and engagement. Yellowfin 7.2 empowers users to flag data quality issues with in-platform screenshots and annotations. Ensure your data and analytic content is more trusted than ever with Yellowfin 7.2.
API connectors	
API connectors: An overview	<p>Yellowfin 7.2 ships with an 'open' connector framework, enabling users to connect to, visualize and act on data from any third-party Web-based application. Yellowfin 7.2 also delivers a range of API connectors for third-party Web applications out-of-the-box, which include pre-built best practice BI content.</p> <p>Connecting to your favorite Web applications is now as easy as connecting to your on-premise databases. Be empowered to create, share and act on analytical insights from your most important third-party Web applications.</p>
Open connector framework	Yellowfin 7.2 includes an 'open' connector framework, enabling clients to quickly and easily build custom API connectors for any third-party Web application. Organizations can then connect those applications straight to Yellowfin to visualize relevant data via stunning charts, reports and dashboards. This allows users to connect to, understand and act on data from any third-party Web-based application within Yellowfin.
Pre-built connectors	Yellowfin 7.2 also ships with a range of out-of-the-box API connectors, enabling users to quickly uncover analytical insights from a range of common third-party Web applications, including Google Analytics, YouTube, Google Sheets, Twitter and more. The Yellowfin team will progressively add more free connectors to the Yellowfin Marketplace over time.
Pre-built content	Yellowfin 7.2 ships with pre-built best practice reports and dashboards for its range of out-of-the-box

	connectors. Simply connect to your favorite Web applications to gain instant insights. Or, easily explore and create your own custom insights and dashboards.
In-memory aggregation	<p>In-memory aggregation has been introduced for stored procedures and Web services. Previously, while you could aggregate things – such as sum amount by region – within a database, you could not do so for stored procedures. Users can now aggregate and filter static datasets in Yellowfin.</p> <p>This inclusion allows users to aggregate data from third-party Web applications in instances where those applications do not self-aggregate.</p>
Creating a report from a report	<p>Yellowfin 7.2 introduces the ability to use a report as a data source. That is, a data source can be saved as a View, allowing users to stack reports on top of each other in order to aggregate an aggregated data set and create a report from a report.</p> <p>The reports on reports functionality means that third-party connectors (as well as OLAP reports and stored procedures) can be turned into a relational data source. This allows those sources to be joined to other data sources in Yellowfin, for the purpose of reporting, via advanced sub-queries.</p>
Forecasting and trend analysis	
Forecasting and trend analysis: An Overview	<p>New forecasting and trend analysis functions introduce predictive analytics features to Yellowfin, extending the breadth of Yellowfin's analysis capabilities. Users can easily add regression lines, averages or reference lines to charts. Yellowfin's new forecasting and trend analysis functions also display the calculations used to create said trends.</p> <p>Conduct better, faster data analysis by visualizing trends and projecting forecasts in Yellowfin 7.2. Understand where your business is heading with Yellowfin.</p>
Forecasting	Add forecast models in Yellowfin 7.2 to visualize and predict what will happen next. Users can perform faster, more accurate forecasting by easily setting the parameters used to create a forecast model in Yellowfin.
Trend analysis	New trend analysis functionality in Yellowfin 7.2 enables users to easily plot the relationship between two variables on a chart to instantly identify trends. Effortlessly uncover patterns in your data to reveal your next big business opportunity with Yellowfin.
Averages	Users can now automatically plot an average value on a

	chart by simply selecting to show an average for a particular metric. Easily display the mean, median and mode on charts.
User interface	
New Source Connection Page	A new connection management page has been built in Yellowfin 7.2. The new page has been restyled, in line with the new look and feel of the Yellowfin 7 series, in order to improve usability.
New Report Information pop-up	The new Report Information pop-up in Yellowfin 7.2 has been restyled, in line with the new look and feel of the Yellowfin 7 series, in order to deliver a more aesthetically pleasing user experience and to improve usability.
New Date Picker	The new Date Picker in Yellowfin 7.2 has been restyled to deliver a look and feel more consistent with the Yellowfin 7 series, while also enhancing usability.
New Broadcast pop-up	The new Broadcast pop-up in Yellowfin 7.2 delivers a better interface for broadcasting reports, which has been restyled in line with the Yellowfin 7 series.
User Administration Page	Yellowfin 7.2 introduces a new users administration page, within the Administration Console, which has been updated to reflect the same styling as the User Profile Page.
New Save Page	The same 'save' lightbox has been integrated throughout the Yellowfin application to ensure a uniform look and feel, as well as a consistent user experience.
View Builder restyled	The Yellowfin View Builder has been upgraded to deliver a look and feel more consistent with the Yellowfin 7 series.
Visualizations and charts	
Chart sorting	Users can now customize sort order at the chart level – the ability to sort a series on a chart (ie Dimension) by metric.
Drill on Auto Charts	Drill options are now enabled for Yellowfin's range of Auto Charts.
Set series color on Auto Charts	Users are now able to manually set the series color for Auto Charts in Yellowfin. Previously, users were limited to the default colors set up by their system administrator.
Big Number charts as Auto Charts	Big Number charts are now included as a charting option when using Yellowfin Auto Charts.

Treemap charts	Yellowfin has introduced Treemaps as a new charting type available in Yellowfin 7.2.
Add column compare to conditional formatting on charts	<p>The ability to compare columns has been added to the conditional formatting options for charts in Yellowfin 7.2.</p> <p>This allows users to compare values to other values, or estimated values, within a dataset by being able to set metric colours on a chart relative to other metrics: For example, when a value in a column is a certain percentage of the total or maximum value in the same column. Or, a value can also be compared to values in another column. By basing it on a different column, users can have a dynamic threshold: For example, a user may have a list of sales people and their individual targets. While the individual sales target is different for each salesperson, a user is still able to compare the value of each salesperson to their individual target, rather than to an overarching target.</p>
Collaboration	
New comment pop-up	The new comment pop-up has been introduced and integrated throughout the Yellowfin application, providing a uniform way of commenting on BI content anywhere within the application.
New share pop-up	The new share pop-up has been introduced and integrated throughout the Yellowfin application, providing an enhanced and consistent interface for sharing all content (reports, dashboards and Storyboards) within the application.
Activity Stream	The Activity Stream in Yellowfin 7.2 shows a user all the changes to a selected content item over time – such as comments, edits and shares – including Storyboards, dashboards and reports.
Community Side Panel	The new Community Side Panel in Yellowfin 7.2 allows users to identify who is using certain content within Yellowfin and engage with them as needed.
New Comments Stream Panel	<p>The new Comments Stream Panel in Yellowfin 7.2 delivers a uniform way of displaying comment streams related to any content throughout Yellowfin – reports, dashboards, Storyboards and on Timeline. The new Comments Stream Panel is a sub component of the new Activity Stream.</p> <p>Whereas the Activity Stream displays anything that has changed with a piece of content over time (edits, shares, comments, etc), the new Comments Stream Panel just</p>

	displays comments related to root comments.
Discussion upgrades	<p>A range of changes to how discussions work in Yellowfin have been introduced as part of Yellowfin 7.2.</p> <p>For example, there are now Discussion Lists (see Business Workflow section for details), additional options for uploading files to discussions (PDFs, etc), the ability to directly reply to another reply in a discussion thread (as opposed to only being able to respond directly to the root questions within a discussion), the ability to group discussion threads together in a logical order as well as manage Tasks (see Business Workflow section for details).</p>
New Create / Save Discussion Page	A new page introduced in Yellowfin 7.2 that is dedicated to creating, saving and managing discussion settings.
Timeline upgrades	<p>The Yellowfin Timeline has been upgraded in Yellowfin 7.2 to ensure that if a user interacts with the new discussion, commenting, Tasks or Activity Stream functionality in Yellowfin 7.2, those interactions will be published and tracked in that users' individual Timeline in real-time within Yellowfin.</p> <p>Timeline has also undergone restyling to ensure consistency with the general user interface enhancements and styling alterations made in Yellowfin 7.2.</p>
Filters	
Improved filter options	When dragging a filter into the filter section on the Data Page, you can now set the value operand (equal to, great than, less than, etc) without having to go to the Settings Page (pops up as a sub menu).
Filter formatting	<p>Yellowfin 7.2 introduces simpler options for formatting filters, including a new interface for setting-up dependent filters.</p> <p>Users can now more easily edit filter positions, create hierarchies, change the sort order and change input styles – that is, how filter functionality displays – with a wide range of options (including radio buttons, drop downs, etc).</p>
New Filter Panels	The Filter Panels have been upgraded and restyled to match the look and feel of the Yellowfin 7 series. Now using the same underlying code across reports, dashboards and Storyboards, the new Filter Panels deliver a consistent user experience throughout the application.

	The new Filter Panels also offer enhanced, more flexible text-based search functionality.
Enhancements to filter and drill breadcrumbs	Users now have the option to include interactive filter and drill breadcrumbs on a report or dashboard. This enhancement allows users to clear individual values, with the flexibility to 'undo' or 'redo' changes. Previously, users had to go into the Filter Panel to change values.
New filter value search pop-up	The filter value search pop-up – which allows users to click on a filter to inspect the available options – has been re-written in Yellowfin 7.2. The new look and feel is consistent with the styling updates made in Yellowfin 7.2. The new filter value search pop-up has also been designed to render results faster.
New filter define value pop-up	The pop-up used for defining filter values in Yellowfin has been re-written in Yellowfin 7.2. The new look and feel is consistent with the styling updates made in Yellowfin 7.2.
Source Filter pop-up	<p>A new pop-up page for Source Filters was introduced in Yellowfin 7.2, with a view to adding the same Source Filter pop-up to the View builder and report pages in later Yellowfin releases.</p> <p>The major functional change is that reports can now be used as a source for filter values.</p>
Date Dimension Filters (min and max)	Yellowfin 7.2 enables minimum and maximum date filtering for dates that are dimensions (minimum and maximum date filter for dates that are metrics was previously available in Yellowfin 7.1).
Content Creation Workflow	
New source connection pop-up	The new source connection pop-up in Yellowfin 7.2 allows users to create a new source connection or new View in a uniform manner from any main page in Yellowfin (Admin Page, Browse Page, Report Output Page, etc). This is the first step in the overhauled Yellowfin Content Creation Workflow. See below for the second step – View creation.
Initiate View	<p>A new page for creating a new Yellowfin View. This change is part of building a consistent, more user-friendly and intuitive workflow of content creation in Yellowfin. Users can then move on and create a report straightaway.</p> <p>This is the second step in the overhauled Yellowfin Content Creation Workflow. See below for the third step – report creation.</p>

Initiate Report	A new page for creating a new report in Yellowfin. This change is part of building a consistent, more user-friendly and intuitive Content Creation Workflow in Yellowfin. This is the third step in the overhauled Yellowfin Content Creation Workflow.
Miscellaneous and user experience	
New Left Side Navigation Menu	Yellowfin 7.2 delivers a new Left Side Navigation Menu, which provides a more intuitive method for navigating through all aspects of the application.
New Browse Page	The Browse Page has been rewritten in Yellowfin 7.2 to improve usability and functionality. The Browse Page now includes folders, Activity Stream, loads more efficiently, provides more intuitive navigation and allows users to sort by category.
PDF Exporter	Improvements to the PDF Exporter mean that content exported to PDF more closely replicates the look and layout of live content in Yellowfin. The rebuild of the PDF Exporter delivers better formatting by first exporting files in HTML then converting them to PDF.
Report Queueing	<p>If a report takes a long time to run, you will now be prompted with options. Users can either wait for the report to finish running or simply choose to have it emailed to them upon completion, allowing them to navigate away and move onto other tasks in order to optimize productivity.</p> <p>Previously, reports would still run on the server, creating potential lag, even after a user navigated away from that report on the browser. Now, once the report is returned to the user – and / or when a user navigates away from the report on the browser – it ceases running on the server to ensure optimum efficiency. Yellowfin administrators are now also able to cancel reports that are taking too long to run.</p> <p>This feature is particularly advantageous for larger enterprise deployments where users may be connecting to slower data sources.</p>
Chart render options	<p>Yellowfin 7.2 introduces the ability to ‘turn off’ auto-refresh for charts, delivering superior performance by stopping the chart recalling the data from the database every time a user makes a change to the settings on a chart.</p> <p>Previously, charts would automatically re-render every time a user changed a setting on a chart.</p>

New Dashboard Management Administration Page	<p>Client organizations (users logging in as a client organization in a multi-tenant environment) can now directly access the Dashboard Management Administration Page when logging into Yellowfin.</p> <p>The new Dashboard Management Administration Page has also been restyled to deliver a more aesthetically pleasing user experience, which is more consistent with the overall styling in the Yellowfin 7 series of product releases.</p>
Dashboard tab subscription enhancements	<p>Dashboard tab subscription enhancements improve the process by which you can add tabs to specific users and manage private tabs. It is now easier to explicitly select the individual users you would like to be able to access particular dashboard tabs.</p>
Improved user search	<p>Improved user search function contains user friendly avatar images and enhanced functionality, including 'did you mean' search capability. The 'did you mean' search function operates in like a 'sounds like' search, displaying results similar to what a user has typed (handy to combat typos, spelling mistakes and instances where the exact search terms have been forgotten or are unknown).</p>
New image loader	<p>A new image loader has been introduced to the Profile Page within Yellowfin. The restyled image loader provides a simple drag-and-drop method for uploading pictures into the database.</p>
New folders pop-up	<p>A new lightbox pop-up allows users to create folders from the Browse Page in Yellowfin 7.2. Previously, users had to navigate to the Administration Page to perform that task.</p>
Plug-in Manager	<p>Allows users to load Java Classes into Yellowfin, making it easier to add analytic functions and new sources.</p> <p>Previously, if a user wanted to install a plug-in into Yellowfin, they had to stop Yellowfin, copy files over and restart the application. Additionally, anything brought into the Yellowfin application had the potential to conflict with Yellowfin dependencies.</p> <p>The new Plug-in Manager allows users to install a new plug-in without having exit and restart the application. In addition, files are loaded into a different class loader. This avoids potential conflict with any Yellowfin dependencies and allows the users to be able to load different version of the same driver for any database (MySQL, Postgres, etc).</p>

HTML Exporter	The code that renders charts and generates tables in Yellowfin has been completely rewritten. Whilst there is no direct impact on the end-user, this major overhaul will enable Yellowfin to add more features – which are dependent on this code base – within a shorter timeframe, thus delivering more innovation to customers in the future.
SSO for iOS mobile applications	Single Sign On has been enabled for Yellowfin’s mobile applications for the iPhone and iPad.
Secure FTP	Yellowfin 7.2 has introduced the ability to send Yellowfin Broadcasts to a secure FTP site. This enhancement is particularly useful for HIPPA compliance for organizations working within the US healthcare industry.
Date unit definition at the View level	Users are now able to define the date unit for charts at the View level in Yellowfin.
Deprecate RTF export capability	When exporting content in Yellowfin, users can no longer export to RTF.
Deprecate Yellowfin Inbox (except for mobile devices)	<p>The Yellowfin Inbox has been replaced by Timeline in Yellowfin 7.2, with all alerts appearing directly on a users’ Timeline in chronological order.</p> <p>The Yellowfin Inbox still remains within Yellowfin’s Android and iOS mobile applications.</p>