



# Release Notes

March 2020

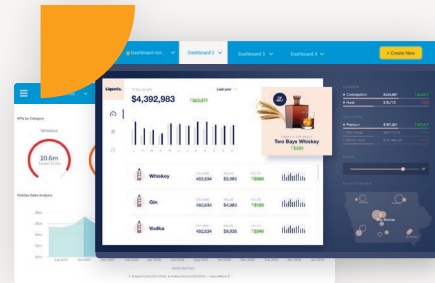
## Introducing Yellowfin 9

# Main Enhancements

Yellowfin 9 provides business users with unique ways to engage with and act on their data, and addresses the needs of data analysts and developers who want to build and deploy amazing analytical experiences.

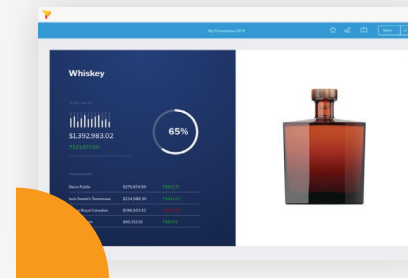
## Actionable Dashboards

Create beautiful, flexible and meaningful dashboard experiences that are actionable and engaging.



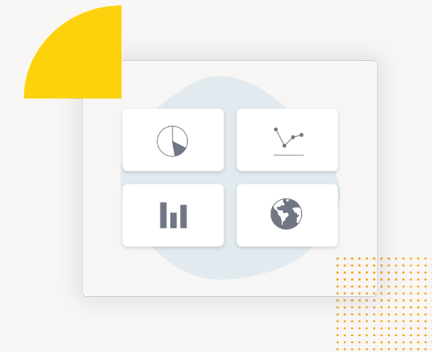
## Yellowfin Present

Communicate the significance of your data-driven insights with a fully integrated presentation module, Yellowfin Present.



## Data Discovery

Enjoy stunning charts out-of-the-box with Smart Chart defaults and logic. Other changes in Yellowfin Data Discovery include new default fonts, new column formatters, and improved color schemes.



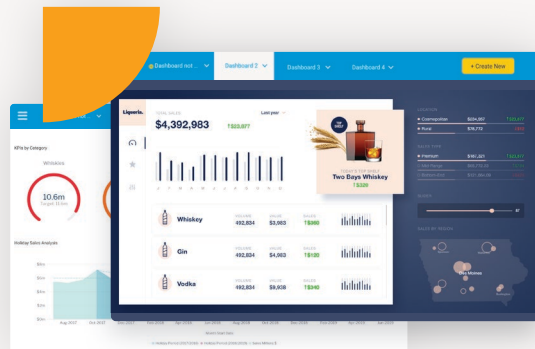
*“Yellowfin is the only strategic enterprise analytics suite that enables organizations to extract transformational value from their data because we combine action-based dashboards, automated discovery, and data storytelling into a single integrated platform. Yellowfin 9 now offers organizations and software developers the tools to modernize, build engagement, automate and innovate the BI experience for their users.”*

Glen Rabie, CEO at Yellowfin

# Actionable Dashboards

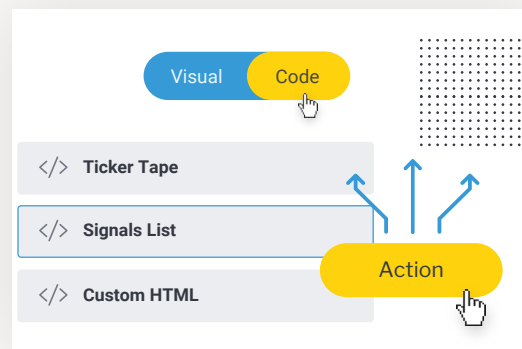
## Create beautiful and meaningful dashboards

If you can think it, you can build it. Assemble creative, on brand infographic and actionable dashboards on a flexible, free-form canvas with our new dashboard builder.



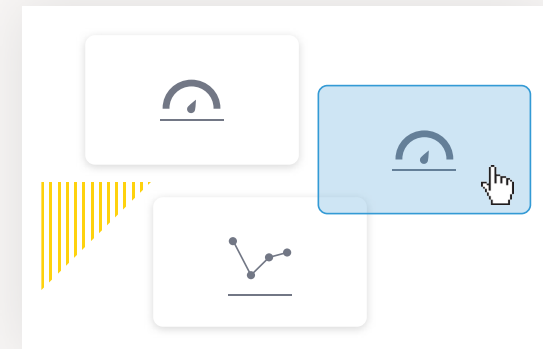
## Build actionable and engaging experiences on the fly

Extend dashboard functionality with our new Code Mode, Code Widgets, and Actions - enabling developers to create custom, actionable, and rich application experiences that we haven't even thought of. Perform deeper integration and embedded analytics with an enhanced Javascript API that is both contextual and state-aware.



## Collaborate and short cut the design process

Put the pen and paper away. Rapidly wireframe that perfect dashboard with Blueprint and collaborate with analyst, designers, and developers. Short cut your dashboard design process by creating reports and charts directly on the dashboard with auto-configured properties. Less clicks all around.

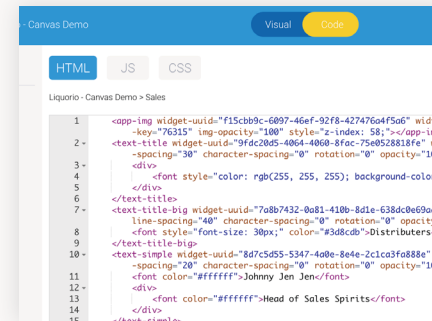


# Actionable Dashboards in more detail



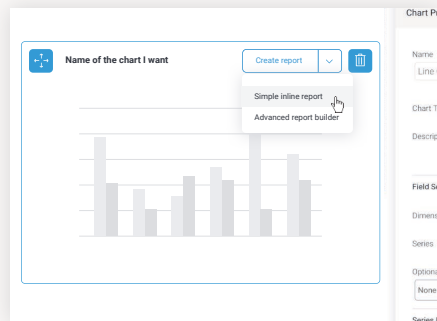
## Blueprint

Rapidly wireframe that perfect dashboard with Blueprint. Annotate and collaborate with both analysts and designers and see it get built in real-time.



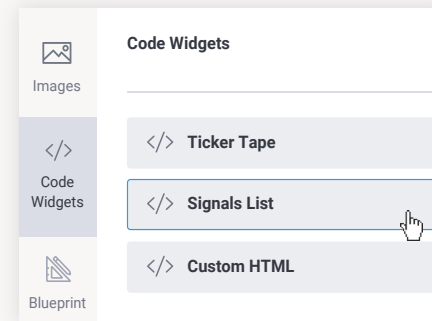
## Code Mode

Swap between visual and code modes with the bilateral editor and edit dashboard code with HTML, Javascript and CSS.



## Quick Charts

Create charts directly on the dashboard with a new Quick Chart workflow with auto-configured chart properties. Less clicks all around.



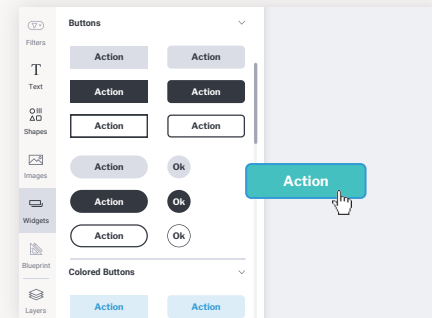
## Code Widgets

Use code widgets to operationalize custom interactivity and consumption into your dashboards. Better still, save your awesome code mode integrations for re-use by other dashboard authors in your organization.



## Dashboard Canvas

Design creative infographics and actionable dashboards on a free-form, pixel perfect canvas layout that are both stunning and engaging.



## Action Buttons

Use out-of-the-box Yellowfin actions, integrate workflows to third party applications or create your own custom action pipelines that do more.

```

HTML JS CSS
Stock > Stock
1
2 let logo1 = this.apis.canvas.select("ginlogo");
3 let logo2 = this.apis.canvas.select("rumlogo");
4 let logo3 = this.apis.canvas.select("whiskylogo");
5 let logo4 = this.apis.canvas.select("vodkaLogo");
6
7 logo1.addEventListener("click", () => {
8     let filter = this.apis.filters.getFilter("C");
9     this.apis.filters.setFilterValue(filter.get);
10    this.apis.filters.applyFilters();
11 });
12
    
```

### JavaScript API Beta

The enhanced Javascript API brings contextual and state-aware APIs to the dashboard canvas and every object in it.



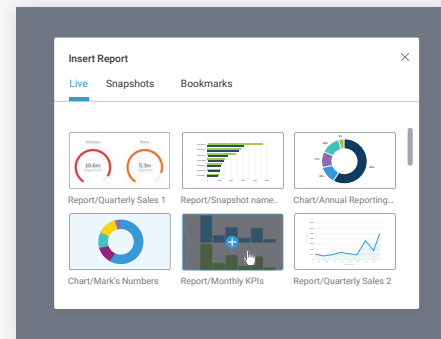
### Preview Mode

Just like Stories, Preview Mode has been introduced to Dashboard to allow you and others to rapidly test and preview a dashboard before it gets published and shared.



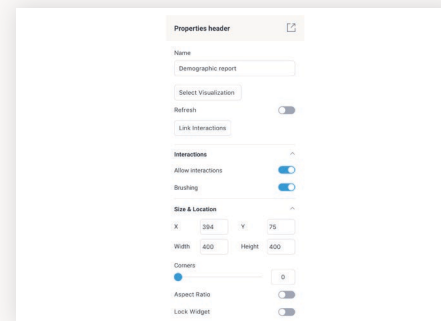
### Report Branching

Select multiple charts from the same report and place them anywhere on the canvas - all without running the SQL multiple times.



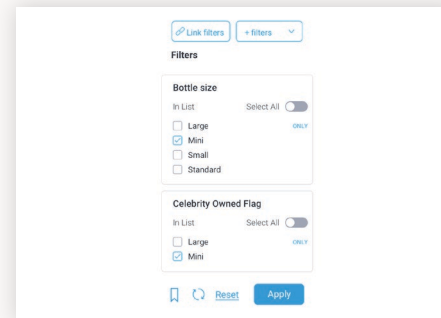
### Snapshots and Bookmarked Reports

The all-new user interface also detects different types of content within a report and allows you to choose a specific chart, snapshot or bookmark.



### Enhanced Properties Panel

Improvements to dashboard objects' properties panel continue to make it more contextual and user-friendly.



### Filters on Dashboard Canvas

You can now add a filter panel directly onto a dashboard canvas with both vertical and horizontal orientations.

# Yellowfin Present

Yellowfin Present will have your audience captivated, with easy to create, accurate, data-led presentations that bring everyone onto the same page.

## Click. Drag. Drop. Present.

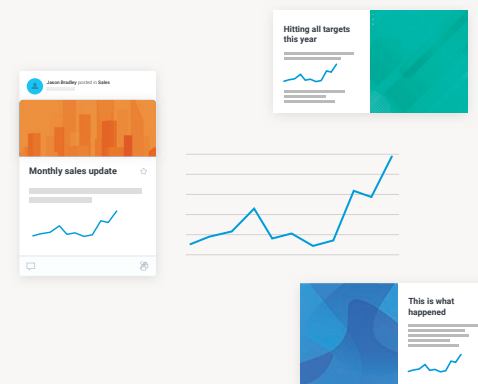
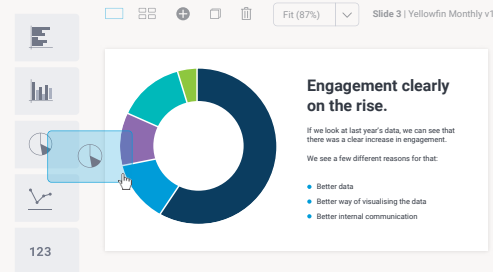
Any business user (not just data analysts) can easily create accurate, data-led presentations using a familiar set of graphic and editing tools. Add shapes, text, images, video to bring your data to life.

## A yarn you can trust

Harness the full power of Yellowfin for information presentation while ensuring a single source of truth from a centralized, secure data store. This means that data used in a presentation is up to date, accurate and secure with a full audit trail. This also eliminates the unreliable process of copying-and-pasting every time new information arrives or old data is updated, allowing presentations to be built once with data refreshed as often as needed, automatically, significantly reducing time and effort.

## From data analyst to story teller.

The Yellowfin collaboration tools enable presentations to be co-created by multiple contributors. Business users can easily collaborate with analysts to build compelling data led presentations that combine analysis with narrative to deliver a data driven storytelling experience more likely to persuade, inspire trust, and lead change.



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### Collaborators



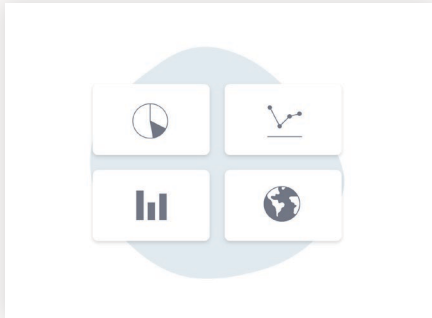
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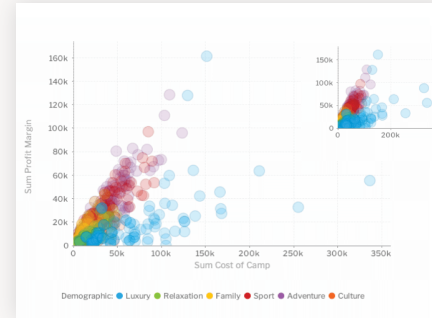
# Yellowfin Data Discovery

We've made significant changes to our report and chart building module, Yellowfin Data Discovery.



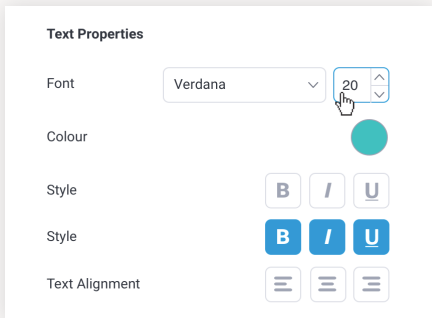
## Smart Chart Defaults

Smart chart defaults for fonts, visual formatting, padding and styles are automatically applied to make your charts look great out-of-the-box with as little effort as possible.



## Smart Chart Logic

Chart elements now automatically switch off or re-order themselves - axis labels, ticks, legends - according to the allocated size on the dashboard.



## New Default Colors and Fonts

Your charts and dashboards now look even more stunning with new color and font defaults.



## Enhanced Color Scheme Setup

Improvements to color scheme setup for charts continue to make the experience more uniform for both auto- and-bespoke charts.



## Sparkline Formatter

Showcase Sparkline charts directly in your report tables with the new Sparkline formatter that converts any array data into a chart. Don't have your data in array form? Convert it by using the new Sparkline Array advanced function.

Camp Region	Sum Cancellation Fee	Camp Region
Asia	\$100,728	
Australia	\$207,355	
Europe	\$827,498	<a href="#">Click Me</a>
Latin America	\$12,981	<a href="#">Click Me</a>
North America	\$21,378	<a href="#">Click Me</a>

## Action Button Formatter

Create action buttons in report tables that can be linked to a static URL or URLs with values passed by returned data.

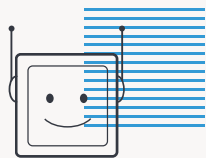
# The Yellowfin Suite

The enhancements in Yellowfin 9 are part of a suite of analytics products that offer industry-first automated analysis and cross-vendor storytelling, as well as industry-leading collaboration. Each product can be bought individually or all together as an integrated platform, so you can choose the products you need to fill in the gaps in your current dashboard environment.



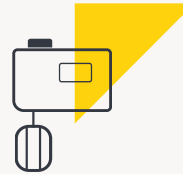
## Yellowfin Dashboards

Monitor and analyze business performance in real time. Easy to build highly interactive dashboards.



## Yellowfin Data Discovery

Explore data and outliers visually that share insights with others. Supports both traditional reporting and modern BI analysis.



## Yellowfin Data Prep

Prepare data for analysis. Extract data from multiple sources, transform, shape and load into a target database ready for analysis.



## Yellowfin Signals

Automatically discover and surface the most important changes in data as it happens, using AI powered pattern detection and relevance scoring.



## Yellowfin Data Storytelling

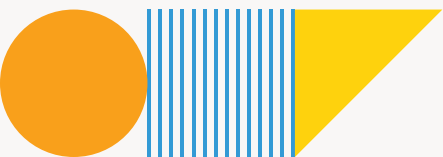
Create data stories and presentations that provide the context behind the numbers. Long form narrative combined with data provides better business insight.

## Request a demo of Yellowfin

See the Yellowfin suite in action and discover our dashboard design tools including embedded actions and the ability to extend functionality through code mode.

Get a demo and find out how you can use Yellowfin internally to optimize your business or embed it in your own application to add value for your customers.

[Request a Demo](#)

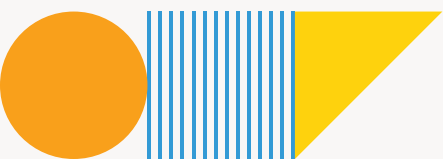




# Enhancements and Improvements

A complete list of new additions and enhancements in Yellowfin 9:

Yellowfin Dashboards	
<b>Overview</b>	The dashboard module has been completely re-architected to enable users to assemble creative, on brand infographic and actionable dashboards via a flexible, free-form canvas. Developer centric capability has been introduced to directly edit dashboard code and create integrated workflows. Functionality to create charts directly on the dashboard has also been included, as well as new content objects, such as Filter Widgets, Code Widgets, Blueprint.
<b>Dashboard Canvas</b>	A new free-form dashboard canvas layout has been introduced. It supports the use of multiple content objects to create pixel perfect dashboard designs. Users will be able to extend dashboard functionality on a Dashboard Canvas with Code Mode, Code Widgets, and Actions Buttons.
<b>Code Mode</b>	A new mode for extending and customizing dashboards has been introduced. This mode gives developers the power to edit dashboard code using common developer languages, such as HTML, JavaScript and/or CSS. Developers can now extend dashboard functionality within Yellowfin and create rich application experiences. Users can easily swap between the visual and code modes of the bilateral dashboard editor.
<b>Code Widgets</b>	A Code Widget plug-in framework has been introduced, whereby developers can code their own UI components and integrate these into Yellowfin to create a custom UI experience or to accomplish other tasks.
<b>Blueprint</b>	A new Blueprint functionality has been introduced that allows users to wireframe a dashboard design.
<b>Quick Charts</b>	The Blueprint widgets can further be configured to create charts directly on the dashboard, with auto-configured chart properties. Current chart types include line/area, pie/ring, meter, numeric, column, and bar charts.
<b>Report Widget</b>	Functionality to add live reports, snapshots and bookmarks to dashboards has been enhanced.

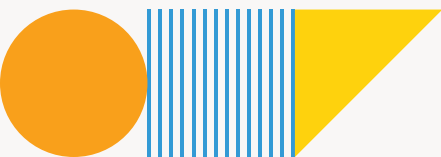


Yellowfin Dashboards	
<b>Filter Widget</b>	Filter objects can now be positioned freely on the dashboard canvas as well as in the standard fixed locations, providing additional design freedom.
<b>Image Widget</b>	An Image widget has been added to the dashboard to add images.
<b>Text Widgets</b>	Text Widgets have been added to the dashboard to allow users to add and customize dashboard text.
<b>Graphic Widgets</b>	Graphic Widgets have been added to the dashboard to include pre designed shapes, line, and icons.
<b>Action Buttons</b>	Action Buttons have been introduced to trigger events and perform custom workflows on dashboards.
<b>Preview mode</b>	A new Preview mode has been introduced to allow users to preview the dashboard and test out its interactions before publishing.
<b>Properties panel</b>	A new panel has been added that allows the properties of any object to be easily customized, with instant effect. Examples of the common properties include; object name, sizing, positioning, background formatting.
<b>Report branching</b>	Multiple charts from the same report can be added to a dashboard.
<b>Multiple report SQL</b>	Advancements have been made that allow the report SQL to be run only once for multiple copies of the same report on a single dashboard.
<b>Report security</b>	Functionality has been added to ensure only dashboard designers and users with access to secure reports, are able to view them on dashboards. Users without access will see a 'No Access' image instead.
<b>Report interactions</b>	The user interface for linking report interactions on the dashboard has been completely redesigned, making it simpler and more intuitive. This includes interactions such as brushing, drill downs, time sliders, and more. You can launch report interactions from the properties panel.

Yellowfin Dashboards	
<b>Edit report</b>	Users can now launch report editing mode directly from the dashboard in order to customize the details of a report, and return directly back to the dashboard.
<b>Export report</b>	Functionality to export reports into CSV format files, from a dashboard has been added.
<b>JavaScript API</b> <span style="background-color: #f4a460; padding: 2px 5px; font-size: 0.8em;">Beta</span>	The JavaScript API brings contextual and state-aware APIs to the dashboard canvas and every object in it. This can be embedded into a user's application to manage interactivity between objects.
<b>KPI reports</b>	Functionality to add KPI reports to dashboards have been deprecated.
<b>Dashboard layouts</b>	Traditional static dashboard layouts have been retained and further enhanced. In addition to reports, filter and text objects can now be added to dashboard sections.
<b>Copy dashboard tab</b>	Functionality to copy a dashboard tab has been added.
<b>Sharing &amp; security</b>	Dashboards sharing has been simplified to enable users to set share recipients and permissions without editing the dashboard.
<b>Subscribers</b>	Dashboards now display users who have marked them as favorite.
<b>Undo, redo</b>	The dashboard builder now supports undo and redo for multiple changes on the canvas.
<b>Dashboard Filter Bookmarks</b>	Filter bookmarks are now available on dashboards and will apply to all linked dashboard reports. These bookmarks can be made publicly available to all users, or saved against specific user accounts.

## Yellowfin Present

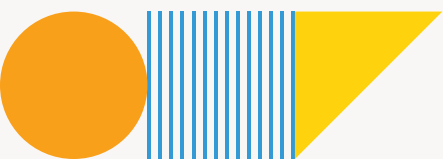
<b>Overview</b>	The Storyboard has been replaced with Yellowfin Present as the presentation module. This module further enhances Yellowfin's data storytelling capabilities. Yellowfin Present is a fully integrated presentation module designed for data led communications. This module contains functionality similar to that of the dashboard canvas. A presentation slide supports the use of multiple types of content, including live reports, text, images, shapes and icons, action buttons, filters, and even code widgets.
<b>Full canvas functionality</b>	The entire dashboard canvas functionality has been shared in Present. This includes all of the features listed above for dashboards, including objects, such as reports, text, images, shapes and icons, filters, Blueprint, Quick Charts, Code Widgets, Action buttons, and Code Mode.
<b>Themes</b>	Present slides can be designed and saved as themes to be reused for other presentations or individual slides.
<b>Filters</b>	
<b>Overview</b>	Filter functionality in Data Discovery, Dashboards and Present has been enhanced.
<b>Filter widgets</b>	New Filter widgets have been introduced that allow filter panels to be directly added anywhere on dashboards, presentations, and a report canvas.
<b>Automatic linking</b>	New capability has been introduced that will automatically link reports on a dashboard to a single filter, where those reports originate from the same view - thus saving the manual effort of linking filters to multiple reports.
<b>Manual linking</b>	Enhancements have been made to make the filter linking process easier. Users can now link filters through the filter panel in an easy-to-use setup.
<b>Filter bookmarks</b>	New functionality to bookmark filters in dashboards and presentations has been introduced.
<b>Autorun filters</b>	Filtered reports can now be configured to run automatically when filter values are selected, without the use of the 'Apply' button.



Code Mode	
<b>Overview</b>	A code editor that allows authorized developers to edit dashboard and presentation code has been introduced.
<b>Object list</b>	An object list that contains dashboard objects added to the canvas, has been added.
<b>HTML, JS, CSS tabs</b>	Multiple tabs have been added that allow users to code HTML, JS, CSS through separate tabs.
<b>Third-party libraries support</b>	Functionality has been added to allow users to load JavaScript files and third-party libraries into the JavaScript section of the code editor.
<b>Security</b>	New configurations and role functions have been added to ensure that dashboard and presentation code is only edited by trusted users.
Yellowfin Signals	
<b>Signal enhancements</b>	All Signal functionality has been centralized into one place, accessible via the Signals List page. Users no longer have to move backwards and forwards between the view builder, schedule manager and signals list when defining and testing signal analysis.
<b>Manage Signals tab</b>	All functionality related to managing signal analyses are arranged in a new Manage Signals tab on the Signals List page. This includes creating new analysis, editing, enabling/disabling, deleting, clearing, copying, and running existing analyses.
<b>Monitor Signals tab</b>	A new Monitor Signals tab has been added to the Signals List page. This allows administrators to see which Signal analyses have been running in the system, when they ran, how long they took, and the status – including how many Signals were discovered.
<b>Signal analysis creation</b>	The process to initiate a signal analysis configuration has changed. This is no longer done via the View layer, but through the Manage Signals tab. Enhancements have also been made to select a view in the first step, upon starting the analysis configuration.
<b>Export signals</b>	Functionality has been added to export signals data from the Signals List page, or Signals of a specific analysis run, to a CSV file.

Yellowfin Signals	
<b>Stories with signals</b>	<p>Signals can now be linked to multiple Stories, and vice versa. This change results in the following changes:</p> <ul style="list-style-type: none"> <li>• Users can add a Signal chart to numerous stories.</li> <li>• Navigate to a Signal from a Story via a newly introduced Explore button.</li> <li>• The Story tab in a Signal detail page will display all linked Stories.</li> </ul>
<b>Correlation in Signals</b>	<p>A correlation factor has been introduced that measures the strength of a correlation. A new configuration has also been added to enable or disable Correlation detection.</p>
<b>New/Lost attribute signal</b>	<p>Enhancements have been made to the New and Lost Attribute Signal analysis to detect significant attributes that became insignificant, and vice versa.</p>
<b>Reworded Clear Signals feature</b>	<p>Changed 'Clear Signals' to 'Clear Analysis' to better reflect feature functionality.</p>
<b>Signal timeline alerts</b>	<p>Changes have been made to further enhance the group signal timeline notification, which now shows the analysis name.</p>
<b>Row limit warning</b>	<p>Functionality has been updated to include a warning message when the Signal cannot analyze the entire data upon reaching the row limit.</p>
<b>Suppress access filters</b>	<p>A new administrative setting has been added for signals, which allows access filters to be suppressed from being mentioned in signal narratives.</p>
<b>Signal narrative change</b>	<p>The Signal narrative now displays a popup of all dimension values upon hovering on it, in case of multiple dimensions. Further, dimension values on Signal narratives are formatted with their default view formatting.</p>
<b>Multiple signals support</b>	<p>Multiple Signals can be added to a story, and multiple stories can contain a signal's chart.</p>
<b>Explore signals</b>	<p>A Signal chart added to a story can now be explored with the introduction of a new Explore button.</p>
<b>Linked Signal button</b>	<p>The Explore Linked Signal option from a story menu has been removed, as functionality has changed to allow multiple signals to be linked to a story rather than one.</p>

Yellowfin Data Discovery	
<b>Report canvas restyled</b>	The report canvas functionality has been enhanced to add more widgets. Options to add filter widgets, Code Widgets, and Blueprint have been incorporated.
<b>Properties panel</b>	A Properties panel has been introduced to the report canvas to edit the properties of a selected object.
<b>Default chart styling</b>	Restyled default chart settings for fonts, visual formatting, padding and styles are automatically applied to charts for an enhanced look without changing settings. Improvements have also been made to enhance the look and feel of multiple charts.
<b>Chart formatting settings</b>	A range of chart formatting settings have been added to allow further customization of charts.
<b>Small chart logic</b>	Charts elements now automatically switch off or re-order themselves with axis labels, ticks, legends, according to their allocated size.
<b>Running total</b>	A new 'running total' calculation has been added to the Accumulation chart function.
<b>Time series overlay setting</b>	Enhancements have been to time series bar charts with two metrics that allow users to choose to display them as overlaid or side by side. An additional setting allows the spacing size to be set between side by side bar displays.
<b>Field enclosure settings</b>	New settings have been added to enclose fields in specified characters when exporting data to CSVs.
<b>Copy content translations</b>	A new setting has been added for controlling translated content to be copied or not, when copying a report with translations in it.
<b>Suppress duplicates</b>	A new setting to control suppression of duplicate values in column charts have been added.
<b>Time series in stack area</b>	Stack area charts have been enhanced to support time series functionality.
<b>Area opacity</b>	A chart setting to control opacity on area charts have been added.
<b>Label abbreviation</b>	A new chart setting has been introduced to allow long metric labels to be automatically abbreviated.



Yellowfin Data Discovery	
<b>Sorting</b>	Sorting can now be applied to multiple charts that previously did not support it.
<b>Sparkline Array Analytic Function</b>	A new Sparkline Array advanced function has been introduced that creates an array of metric data aggregated by a date value, as part of creating sparkline charts within a report table.
<b>Sparkline formatter</b>	A new Sparkline column formatter has been added that allows users to create sparkline or column charts within the report table.
<b>Action button formatter</b>	A new column formatter to create action buttons with URL links within a report table.
Performance	
<b>Optimized user access checks</b>	Functionality has been enhanced to improve user's access checking process time by caching the result for multiple checks.
<b>Dynamic filters check</b>	Enhancements have been made to improve performance when determining whether a report is affected by dynamic filters defined at the view.
<b>AverageRunTime task</b>	AverageRunTimeRefreshTask has been updated for less database select and update operations.
Other enhancements	
<b>Content Fonts</b>	Yellowfin's content font capabilities have been upgraded. Now a range of popular fonts can be used out-of-the-box. Administrators can specify default content fonts for consistency. Hard-coded fonts have been removed. Enhancements have also been made to easily import custom corporate fonts into the system.
<b>Browse page</b>	Enhancements have been made to allow draft and published dashboard content to be accessed via the Browse page. Control for multiple users accessing draft content is also managed.
<b>Draft content</b>	The process to edit draft content from the Browse page has been enhanced. Such objects are instantly opened in their respective builders, ready to be edited.



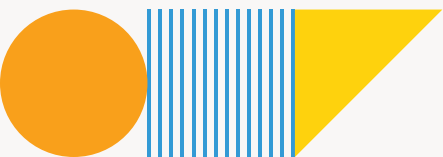
### Other enhancements

#### Custom email

Added a configuration that allows administrators to set up a customized email address and sender name, when users share Yellowfin items via Email.

#### UI Design

Enhancements to the overall UI design and user experience of the entire platform have been made.





Things change. Know why.

Yellowfin is a global Business Intelligence and analytics software vendor with a suite of world-class products powered by automation. Yellowfin is recognized as an innovator by the world's leading analyst firms. More than 27,000 organisations and more than three million end-users across 75 countries use Yellowfin every day. For more information, visit [www.yellowfinbi.com](http://www.yellowfinbi.com)

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