Contents

Overview.................................................................................................................................3
Multiple Clients on a Single Yellowfin Instance .................................................................4
Managing Access to Content.................................................................................................5
  Data Sources ..........................................................................................................................5
  Views ....................................................................................................................................5
  Report Categories ..................................................................................................................5
  Reports ..................................................................................................................................5
  Dashboards ............................................................................................................................6
Managing Users ......................................................................................................................6
  User Management ................................................................................................................6
  Person Search .......................................................................................................................6
  Groups ....................................................................................................................................6
  Roles ......................................................................................................................................6
  Additional Information .........................................................................................................7

Yellowfin, and the Yellowfin logo are trademarks or registered trademarks of Yellowfin International Pty Ltd. All other names are trademarks or registered trademarks of their respective companies.

While every attempt has been made to ensure that the information in this document is accurate and complete, some typographical errors or technical inaccuracies may exist. Yellowfin does not accept responsibility for any kind of loss resulting from the use of information contained in this document.

The information contained in this document is subject to change without notice. This text contains proprietary information, which is protected by copyright. All rights are reserved. No part of this document may be photocopied, reproduced, stored in a retrieval system, transmitted in any form or by any means, or translated into another language without the prior written consent of Yellowfin International Pty Ltd.

The incorporation of the product attributes discussed in these materials into any release or upgrade of any Yellowfin software product – as well as the timing of any such release or upgrade – is at the sole discretion of Yellowfin.

This document version published June 2010 Copyright © 2010 Yellowfin International Pty Ltd.
Overview

Yellowfin is the only BI product that has been designed from the ground up to support SAAS deployments – either as a standalone application or embedded into a SAAS solution. You can deploy Yellowfin in traditional hosted environments or in the Cloud supporting either multi database or multi-tenancy environments.

At Yellowfin we understand the complexities of Multi-tenancy support. You have gone to a lot of trouble to build an application that partitions data based on your client id – well here is a BI tool that lets you continue to do the same.

With Yellowfin you can:

1. Share common content across all your clients as well as allow clients to create their own unique reports; and

2. Partition a single data base by dynamically filtering data based on their client id; and

3. Dynamically swap database connections if you have a unique instance of database for each client whilst sharing common content

To support a SAAS environment Yellowfin features functionality called “Client Organizations” which allows multiple virtual instances of Yellowfin to reside within the same server instance. This allows content to be created and segregated from other organizations logging onto the same Yellowfin server.

Client Organization functionality operates on a two-tier basis. The top tier, known as the Default Organization, can have content that is shared between all Client Organizations. Content created at the second-tier will not be visible to any other second-tier instances of Yellowfin.

Yellowfin’s Client Organization functionality is managed completely by web services. Web services exist to create and delete Client Organizations from Yellowfin. Other web services allow for the management of users in regards to Client Organization access and logging the user into a particular Client Organization.
Multiple Clients on a Single Yellowfin Instance

Yellowfin is unique in its integration into hosted applications where multiple clients use the same physical instance of a database.

Generally in this scenario customer data is partitioned using a client id. Yellowfin has the capacity to utilize the same process internally for a number of key processes.

The Client Organization model consists of a Default (Primary) Organization, and optional client organizations:

Users can be given access to login to the Default Organization and/or one or more Client Organizations. Content such as data sources, reports and dashboards can belong to either the Default Organization or one of the Client Organizations.

When a user logs in to an organization (default or client), any content they create “belongs” to that organization. In general, users logged in to the Default Organization will only be able to see content belonging to the Default Organization. Users logged in to a Client Organization will be able to see content belonging to that client and the Default Organization, but not any other client.
Managing Access to Content

One of the big benefits of a SAAS environment is the capacity to share content between clients. This reduces the effort required to set up new client organizations as they come on board as well as reducing the ongoing administration effort required to manage the report set available to users.

For example if your application has the same schema for all of your clients then a single set of content can be created that is shared across all your customers. If those customers choose to create their own content this content will be unique to them. Yellowfin ensures that multi-tenancy rules apply to all content created, distributed and searched.

Listed below are the major content items within Yellowfin and how Yellowfin manages each of these in a SAAS environment.

Data Sources

Sources belong to the organization they were created at. Users with appropriate access can see data sources belonging to their “current” organization (the organization they logged in to) or the Default Organization.

In situations where each Client Organization is using a separate, but identical database, it is also possible to configure a source database at the Default Organization to be replaced by a client organization database at report execution time. This allows the use one set of reports and views across multiple databases. This will save replicating content at each Client Organization.

Views

Views belong to the organization that owns the data source. A user logged in to a client organization can see data sources belonging to the Default Organization and can create views against them. In this situation the views then belong to the Default Organization, and will be visible to other clients as well. If this is not desired, do not give users logging in to the client organization access to create views.

Report Categories

Each organization has separate report categories. In the Administration – Categories section, users can see and edit the categories belonging to their current organization. Users logged in to a client can still see reports in categories that belong to the Default Organization (unless the categories are restricted). Reports can only be published into categories that are owned by the current organization – so you must create categories at each client that will be creating reports.

Reports

Reports belong to the organization they were created at. Users logged in to the Default Organization can only see reports from that organization, but users logged in to Client Organizations can see and
run reports belonging to that client or the Default Organization. Users can only ever edit reports belonging to the organization they logged in to.

Dashboards

Corporate dashboard tabs are owned by the organization they were created at. Users logged in to a client organization can access corporate tabs created at that client or the Default Organization. Personal dashboard tabs are available at all organizations that a user can log in to, but will only contain reports that are visible at that organization. Reports that are visible on a dashboards are those from the current client or default organization.

Managing Users

All user management is typically handled through web services. This is to ensure seamless integration between the SAAS applications users and those with access to Yellowfin.

Listed below are the main user processes and how they are managed through the application in a SAAS environment.

User Management

The user management section shows users that can log in to the current organization. If a new user is created, they are given access to log in to the current organization. If a user is deleted, they will no longer be able to log in to the current organization, but they will retain access to any other client organizations that they are allowed to log in to.

Person Search

Person searches return users that can log in to the current organizations. This ensures that a user from one Client Organization will not be able to see users from another Client Organization.

Groups

Groups are owned by the organization they were created at. Users can only see groups owned by the current organization they are logged in to. Groups based on roles will only include users with the specified role at the current Client Organization.
Roles

Roles are defined at the default organization only. A user only ever has a single role, which applies to all Client Organizations where they are allowed to login.

Additional Information

The Client Organization web service functions are described in the Yellowfin Installation Guide. The Yellowfin Integration Guide also outlines steps required for implementing Client Organization functionality in Yellowfin.

Find out more

Contact Yellowfin at www.yellowfin.bi and ask for our proven roadmap to assist you to successfully implement Yellowfin spreadsheet management into your organization.