



## Yellowfin Training

Webinar Sessions

## Overview

### Training Levels

We have split our training into three skill levels:

1. **Introductory** – Intro to Yellowfin & Content Building
2. **Advanced** – Advanced Content Creation
3. **Administration** – Yellowfin Administrator Training

Each level consists of a three hour online training session led by a Yellowfin instructor. Once the webinar is complete, participants are given access to training exercises to master in their own time. They will also have access to the Yellowfin instructor via email for a week after each session, to ask any questions around the training material and concepts covered.

### Pricing

Pricing for webinar training sessions are defined by individual participants, or organisations.

Pricing Type	Description	Cost Per Level*
Individual	One participant registered for a public session, which may contain participants from other organisations.	\$475
Organisation	Unlimited number of participants in a private session for the organisation.	\$3,000

\* Prices are based on US dollars and exclude local taxes where applicable.

## Level 1

### Introduction to Yellowfin & Content Building Concepts

#### Objective

Learn how to navigate the system and collaborate with other users, interacting with various forms of content. From here participants will create basic reports that include formatting, filtering, calculations, and basic charts.

#### Audience

All first time Consumers of Yellowfin content and first time Yellowfin Report Writers.

**1. Component Overview**

Connection, View, Reports, Dashboards, Storyboards

**2. Content Access**

Search, Browse, Inbox, Dashboard, My Content Panel, Timeline

**3. Interaction**

Drill Down, Drill Anywhere, Drill Through, User Prompt Filters, Date Slider & Unit Selection, Maps

**4. Report Creation Basics**

Fields, Aggregation, Advanced Functions, Sections, Filters, Calculated Fields, Enabling Drills, Chart Basics

**5. Report Formatting**

Field Formatting, Conditional Formatting, Grouping, Suppress Duplicates, Totals & Sub Totals

**6. Report Actions**

Open, Copy, Export, Subscribe, Details

**7. Collaboration**

Comments, Notes, Timeline Threads

**8. Dashboard Basics**

Basic Tab Creation, Dashboard Actions, Pre-Built Tabs

**9. Storyboard Basics**

Presenting, Actions

## Level 2

### Advanced Content Building Concepts

#### Objective

Learn how to create a variety of Yellowfin visualisations and explore the advanced reporting concepts available, expanding on Level 1 skills. From here participants will learn how to create Dashboard and Storyboard content with all the advanced linking functionality available.

#### Audience

Advanced Report Writers (with existing basic report writing knowledge) and Content Creators.

#### 1. Charts

Chart Builder Components, Standard Charts, Time Series Functionality, Specialty Charts, Analytical Charts, Maps, Multi-Chart Canvas

#### 2. Report Filtering

Org Ref Code Filters, Cached Filters, Dependent Filters, Date Filters

#### 3. Related Reports

Co-Display, Drill Through

#### 4. Advanced Reports

KPI Reports, Report Summary, What If Analysis, CSV Import

#### 5. Sub Queries

Append, Union, Minus, Intersect, and Advanced

#### 6. Report Actions

Annotation, Broadcast, Scheduling

#### 7. Dashboards

KPI Tabs, Filtered & Linked, Series Selection

#### 8. Storyboard

Initial Setup, Slide Types, Filters

## Level 3

### Yellowfin Administrator Training

#### Objective

Learn how to configure and maintain the Yellowfin system, with in-depth exploration of the View Builder (Meta Data Layer), Content & Data Security, User Management, and System Configuration.

#### Audience

All users that will function as Yellowfin Administrators, and Advanced Report Writers that will be maintaining Yellowfin Views, Users, and Content.

#### 1. Admin Console

Admin Tour & Help, Licence Countdown, Usage KPIs, Content Management Panel Overview, Configuration Overview, Administration Overview

#### 2. Configuration Items

Configuration, Content Settings, Images & Maps, Email Template

#### 3. Administration Items

Session Management, Schedule Management, Dashboard Management, Licence Details, System Information, Content Translation, Client Organisations, Export/Import

#### 4. Content Management Panel

Data Sources, Views, Users, Roles, User Groups, Storyboard Themes, Content Tags, Date Filter Periods, Geo Packs

#### 5. Views

Creation Methods, Joins, Conditions, Aliases, Field Selection & Categories, Field Formatting, Org Ref Codes, Hierarchy Setup, Drill Anywhere, Calculated Fields, Virtual Tables, CSV Tables, Caching, Editing, Geo Pack Fields

#### 6. Security Management

Role Permissions, Source Access, View Access, Column Access, Content Category Access, Content Access