



## Connecting People to Expensify

14<sup>th</sup> September 2016

Analyzing your expenses and tracking reimbursements is very important for any organization in budgeting and identifying the bottlenecks in reimbursements. Expensify connector provides insightful access to your expensify data, giving you the ability to visualize and analyze your expenses, reimbursements, and reports. It also comes with pre built content to easily analyze your expensify data.

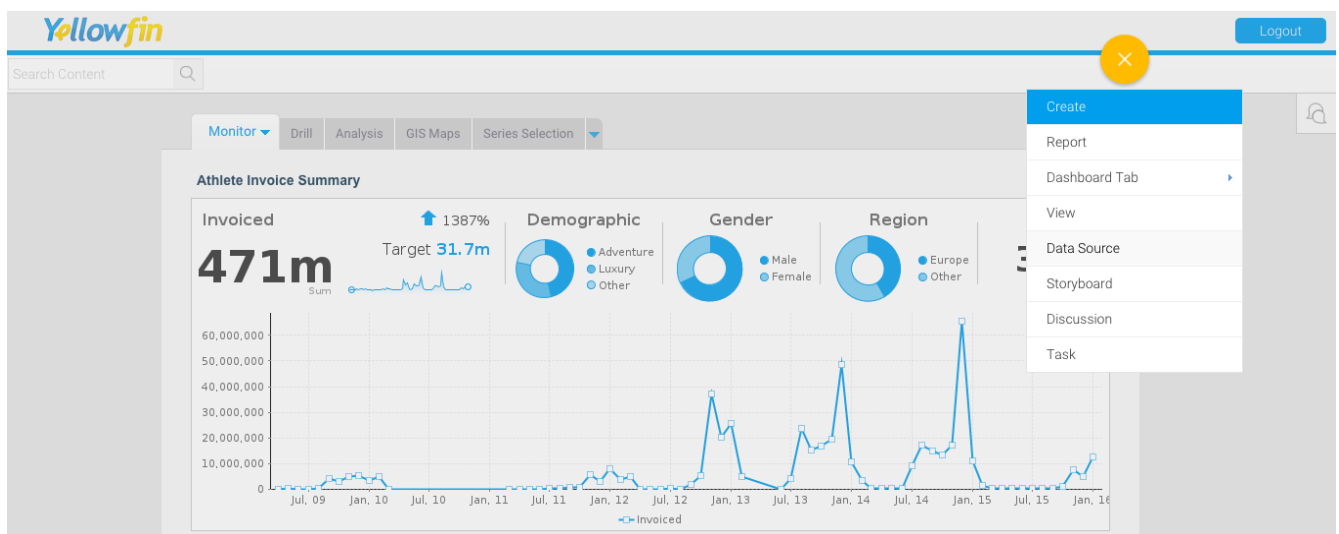
Yellowfin makes connecting to Expensify and sharing insights easy:

1. [Install your connector](#)
2. [Connect to your account](#)

## Install your Connector

### Add a New Data Source

- a) Log into your Yellowfin Server  
(The User must have permissions to add a new Data Source)
- b) Click **Create** and select **Data Source**

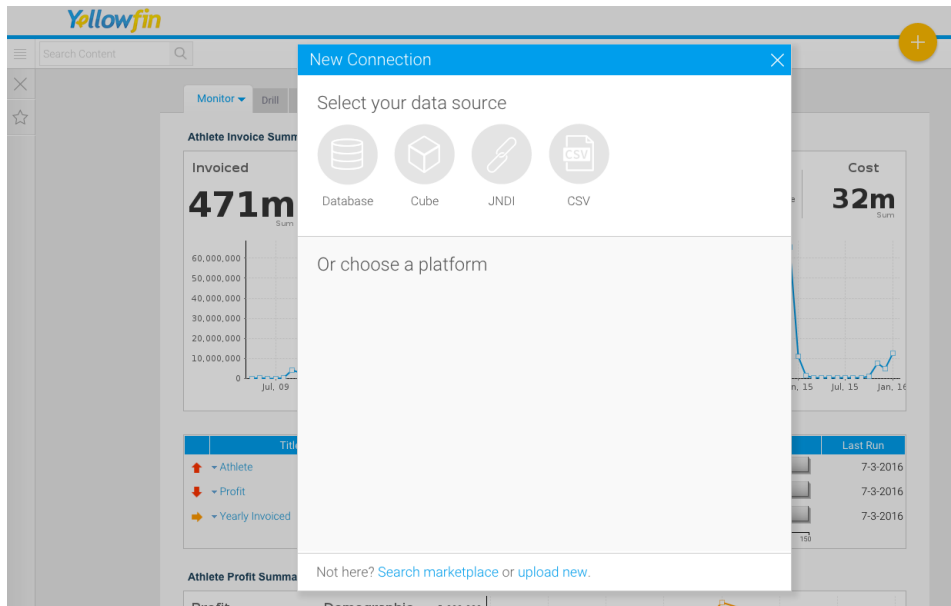


### Upload new connector

If you can see the icon for the Expensify Connector at the **New Connection** step, then you can skip to step [Connect to your Expensify account](#). Otherwise you will need to select the **Not here?** links.

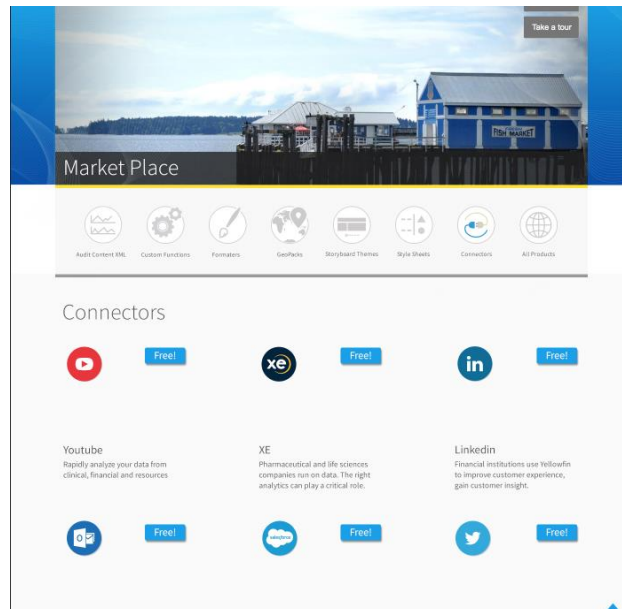
**Search Marketplace** - download your connector from the Yellowfin Marketplace

**Upload New** - upload your connector to your instance of Yellowfin



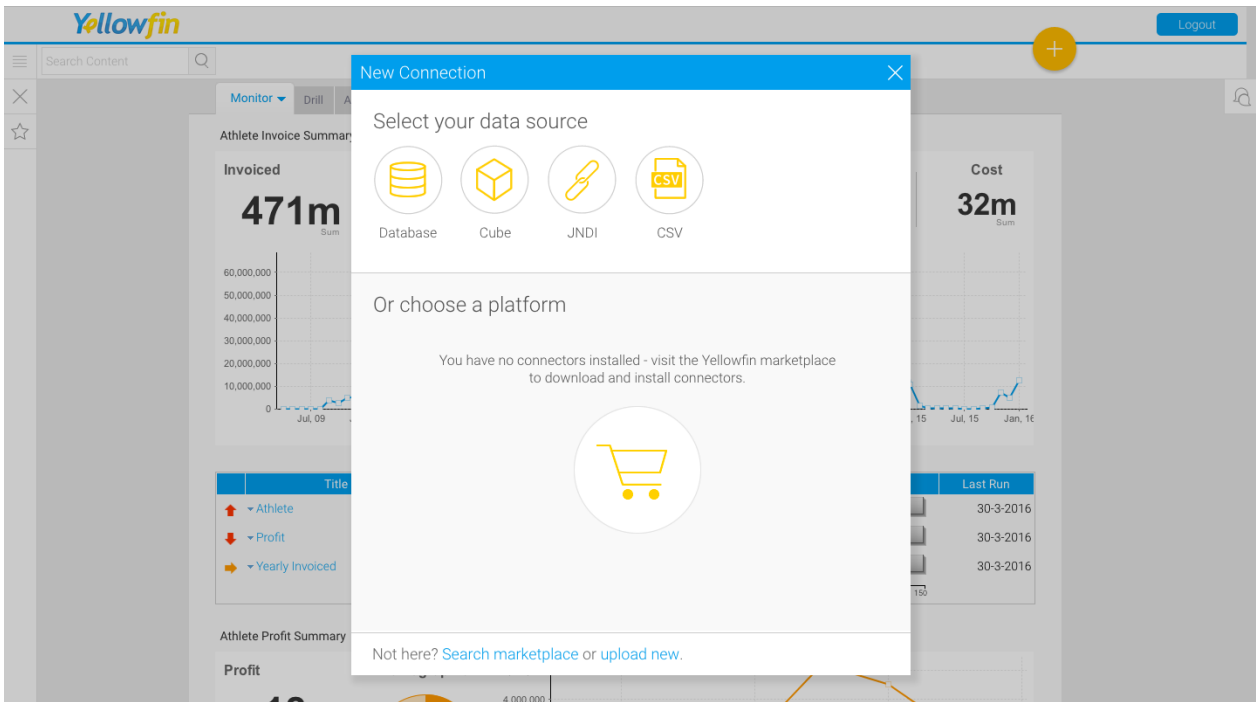
Download the connector from the Yellowfin Marketplace

- c) Go to the [Yellowfin Marketplace](#)
- d) Download the **Expensify Connector** (it's free!)



Upload your new Connector

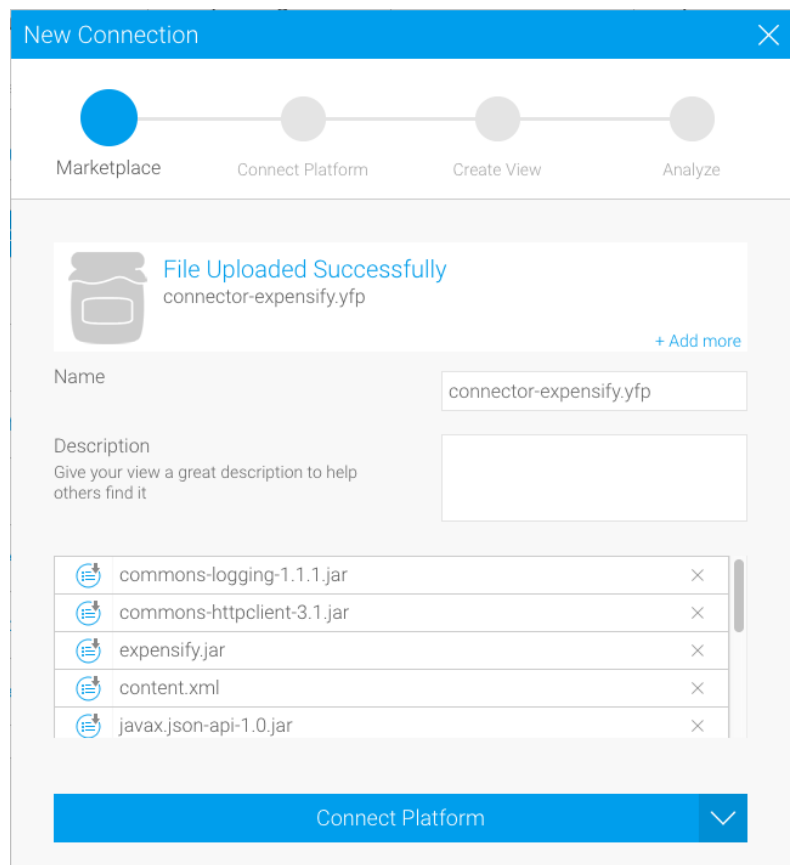
- a) Click **Upload New**.



b) Give your connector a **name** and **description**.

c) Click **Connect Platform**.

Your connector will now be available under your **Data Source's** list.



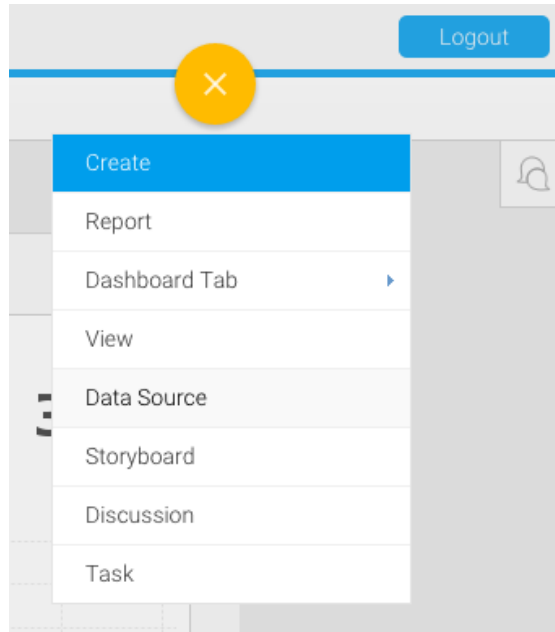
# Connect to your account

Once your Expensify Connector is installed, you can use it to connect to your Expensify account.

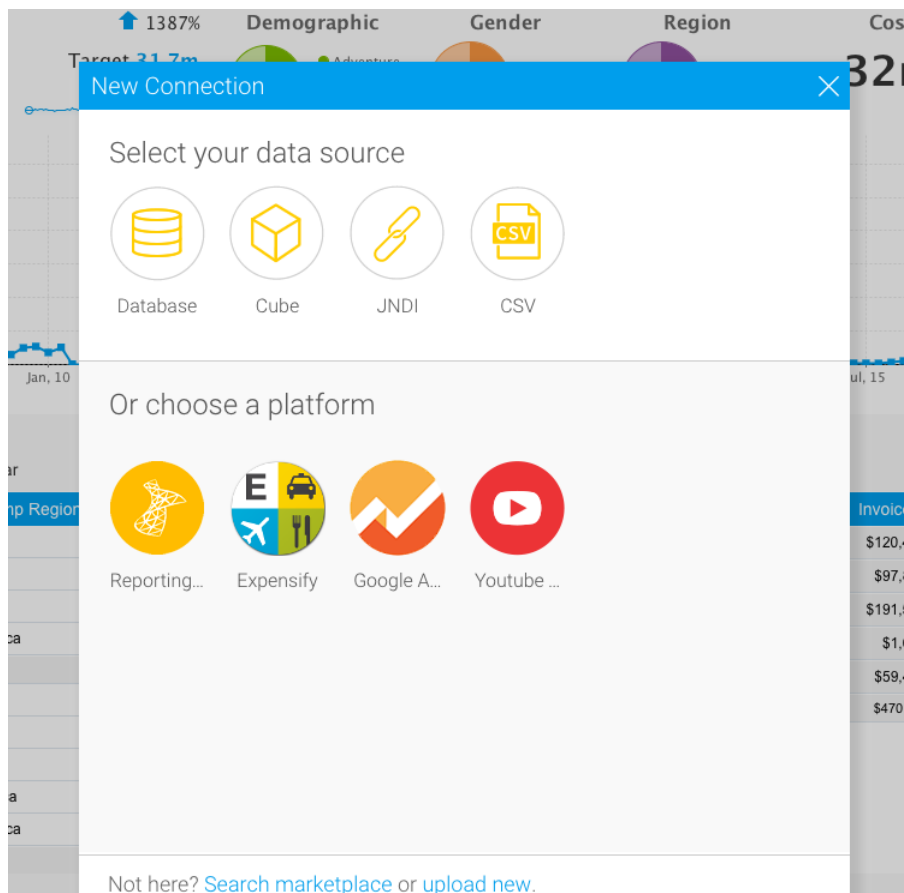
## Create a new Data Source

a) Click **Create** and select **Data Source**.

(If you have just installed your connector, then you will be immediately taken to the next step)



b) Select **Expensify**



## Name your Connection and Enter your Account Details

- c) Give your connector a **name** and **description**.
- d) Enter your Partner UserID, Partner UserSecret. If you don't have them, you can generate them from the following URL.  
<https://www.expensify.com/tools/integrations/>
- e) Enter Global Currency and Number of Days (Time period to consider for Reporting)
- f) Click **Launch Pre-Built Content**

New Connection

Connection Setti... Create View Analyze

Name:

Description:

Connection Details: 1. Enter your Expensify partnerUserID. 2. Enter partnerUserSecret.

1. Partner UserID:

2. Partner UserSecret:

3. Global Currency:

5. Number Of Days:

Launch Pre-Built Content

# About Yellowfin

Yellowfin is a global Business Intelligence (BI) and analytics software vendor passionate about making BI easy. Founded in 2003 in response to the complexity and costs associated with implementing and using traditional BI tools, Yellowfin is a highly intuitive 100 percent Web-based reporting and analytics solution. Yellowfin is a leader in mobile, collaborative and embedded BI, as well as Location Intelligence and data visualization.

Over 10,000 organizations, and more than 2 million end-users across 70 different countries, use Yellowfin every day. For more information, visit [www.yellowfinbi.com](http://www.yellowfinbi.com)

## Additional Resources

[Yellowfin Website](#)

[Yellowfin Marketplace](#)

[Yellowfin Wiki](#)

[Support Forum](#)

[YouTube Channel](#)