Initial Setup

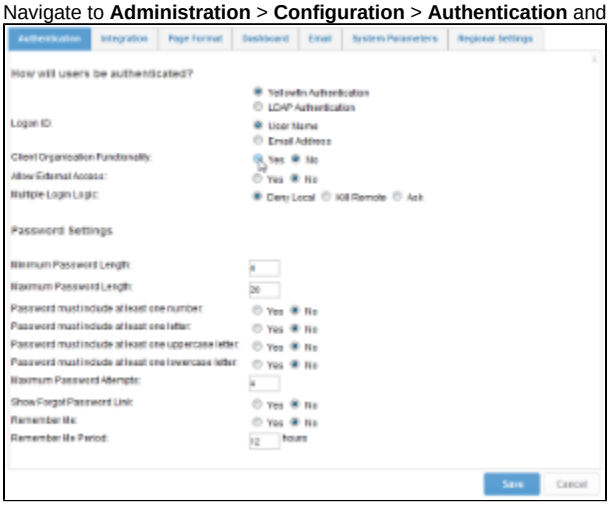
- Overview
- Creation
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  - Users
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- Content
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- Configuration Options
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Overview

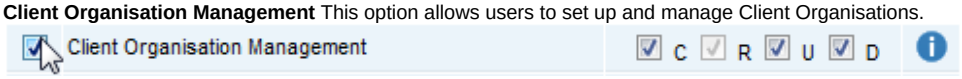
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In order to use the Client Organisation structure a Yellowfin Administrator will first have to enable it. Disabled by default, the following steps must be completed;

1. Navigate to **Administration** > **Configuration** > **Authentication** and enable the **Client Organisation Functionality**



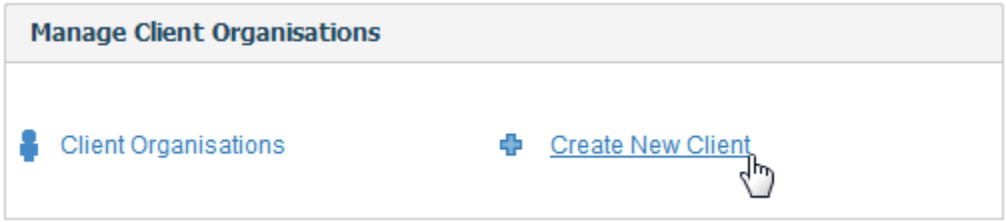
2. Enable the required role permission, found in **Administration** > **Role Management**, under the **Administration** role permissions section:
   a. **Client Organisation Management** This option allows users to set up and manage Client Organisations.



Creation

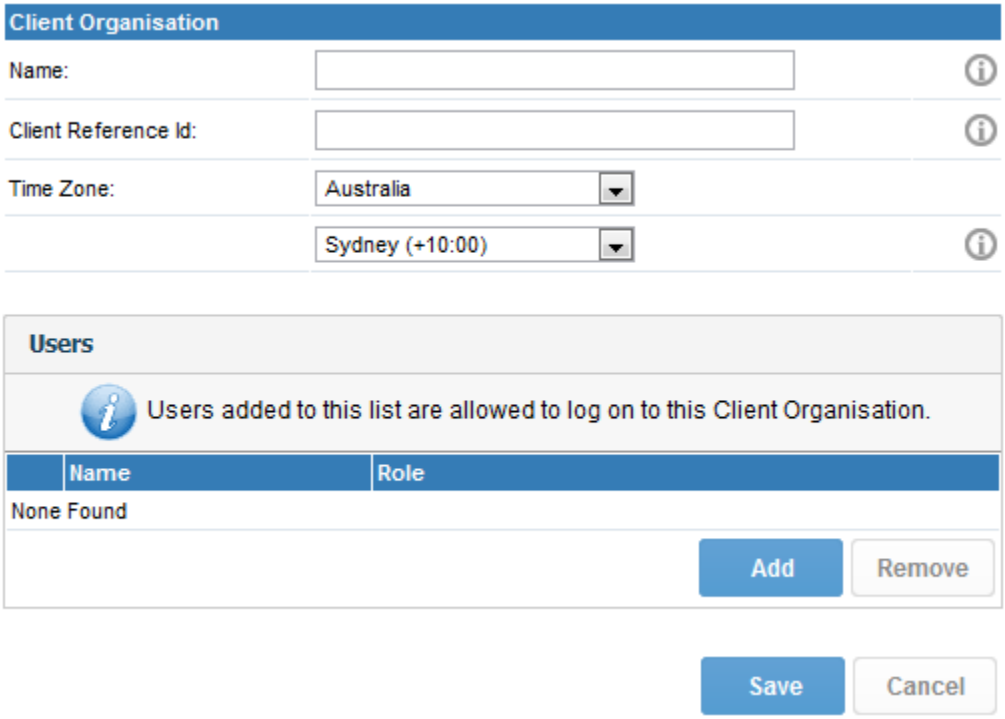
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In order to create a Client Org, you must navigate to **Administration** > **General** > **Create New Client**.



From here, you will need to define the following:

1. **Name**: this is the display name for the Client Organisation.
2. **Client Reference ID**: used to uniquely identify the Client Organisation.
3. **Time Zone**: this is used as the default time zone when new Data Sources and Users are created within the Org.
4. **Users**: this is a list of users who will have access to the Org.



Client Reference ID

A Client Organisation is identified by a **Client Reference ID**. This is an arbitrary text identifier assigned when the client is created. This ID must uniquely identify the Org across the entire system and may not be left blank. The Default Org is an exception to this, as the ID is initially blank, but can be defined at any time.

Generally, the Client Reference ID should be an internal, unique code that you use to identify a client. Yellowfin can use this code to filter reports based on which client a user has logged into. A display name for the client is also set, which may be different to the ID.

Users

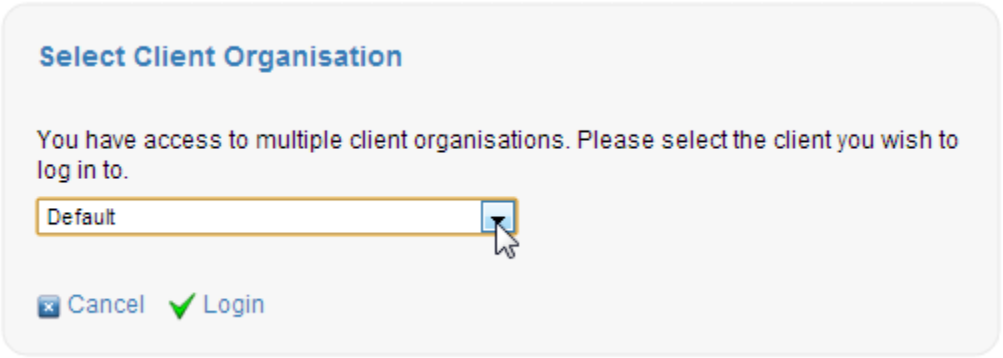
In order to add a user to a Client Org, they must first be created in the system, either at the Primary or Client level. When a new user is created, they are automatically assigned access to the Org they were created in. If users were created before Client Orgs were enabled, they will need to be manually added to at least one Org. Once created in Yellowfin, users can be assigned access to any Org (Primary or Client) in the system.

Groups

User Groups can only contain Users who have log in access to the Client containing the Group. For example, if an Administrator creates a Group for Client 1, only Users of Client 1 can be added to the Group, Client 2 Users will not.

Access

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A user may only ever log into one Org at a time. As part of the login process, Yellowfin checks which Orgs the user has access to. If they have access to a single Org, they will automatically be logged into that Org. If, however, they have access to multiple Orgs, they will be prompted to select an Org:



Note: if you wish to specify which Org the user logs into, this selection screen can be bypassed using a custom login page, or with web services.

Content

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Content created at the Primary Organisation is shared to all clients, so a user logging into a particular client will be able to see any content created at that client, as well as any content created at the Primary Organisation.

> *See Content Management for more information.*

Securing Primary Org Content

It is possible to assign access permissions to content located in the Primary Org by securing the Content Categories it's stored in, based on Client Org User Groups.

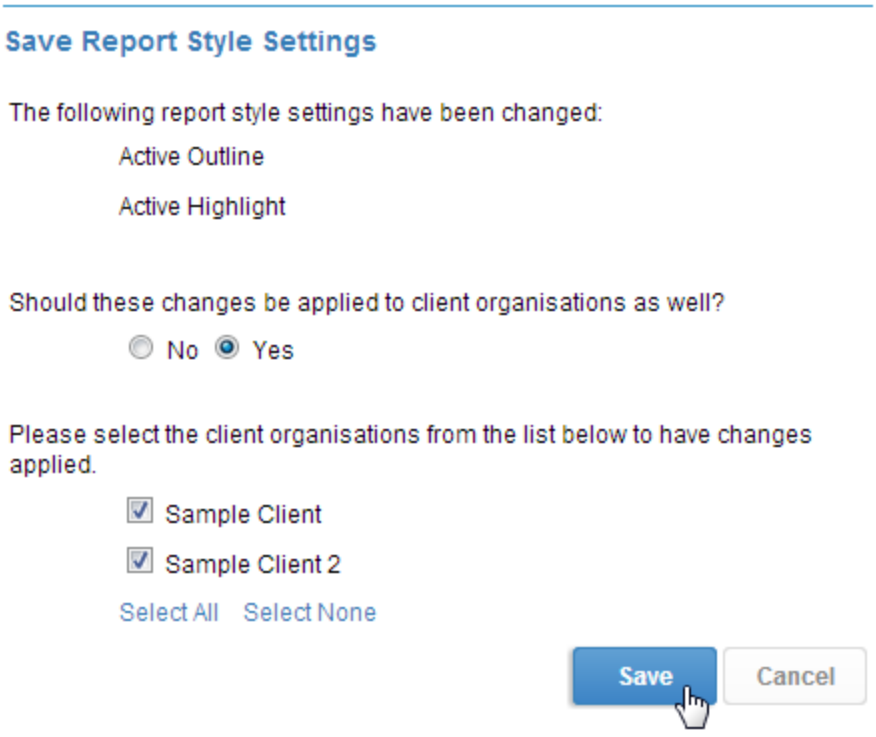
> *See Primary Org Content Security for more information.*

Configuration Options

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The **Configuration** and **Report Styles** pages in Administration allow Yellowfin Administrators to set options that affect Functionality, System Parameters, and Default Style Settings. When a Client Organisation is created, all of these settings are copied from the Primary Organisation. An Administrator can then log in to the Client Org and customise the settings for the client. This allows each client to have different Regional Settings, Integration Options, and Styles.

Note: some Configuration options are only applicable to the Primary Organisation, and will not be shown when logged in to a client.

After you have created one of more Client Organisations, any changes to the Primary Organisation's Configuration Settings may be optionally applied to different Client Organisations as well. The Administrator will be prompted to define which Clients the changes should apply to (see below).

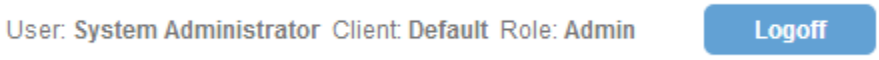


Displaying Current Client Organisation

If you have users that have access to, and routinely move between different Client Organisations, it may be useful to display which Client the user is currently logged in to. To enable this display, navigate to **Configuration** > **Page Format** and set the **Show Client** option to **Yes**. There are also options to display the name and role of the current user.



These items are then displayed in the Standard Yellowfin Header as shown here:



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