

# Access Filters

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## Overview

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Access Filters are used to restrict data based on the user running a report. A manager may only be allowed to see employee details from his or her own department, for example. Access Filters match users within Yellowfin to an arbitrary Reference Id. The Reference Id for the user can then be used as a filter when they run reports.

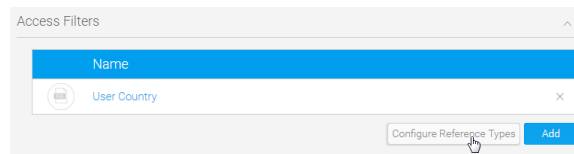
The steps for setting up Access Filters are:

1. Create an Access Filter on the data source
2. Assign the Access Filter to a field on a view
3. Define a default Access Filter on the view
4. Assign an Access Filter to a report

## Configure Reference Types

Each source filter that you create needs to be categorised by a reference type. This is used to link the data in your source system with Yellowfin meta-data. It also provides a way to categorise the type of filters that you can make available for your views.

1. Click on the **Configure Reference Types** button at the bottom of the access filter list.



2. Type a name for your reference type and click the **Add** button. Alternatively, click on the **x** next to an existing reference type to delete it.

**Note:** If you wish to delete a filter type then from the edit popup select a type and click the delete link. You will be prompted to click OK to save your changes. If you delete a type which is in use this may impact your reporting filter process.

## Create an Access Filter

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1. Open the Access Filters section on the connection details page.
2. Click the **Add** button in order to create a new **Access Filter**.

If this is the first time you have created an access filter, you may be shown this message, which provides you with some information on how access filters work.

Click on the **Got it! Don't show me this again** link in order to continue and not be shown this message the next time you set up an access filter.

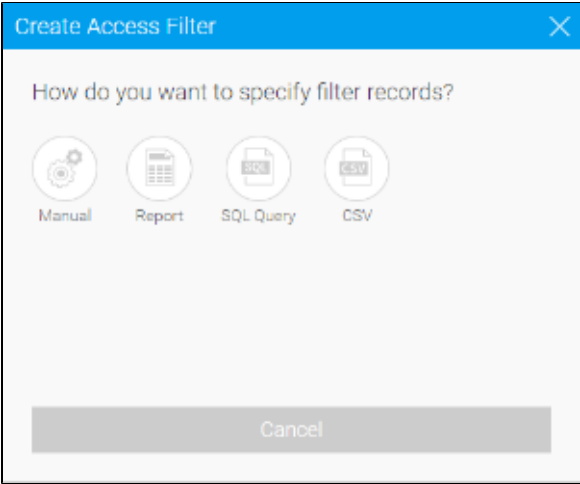
Click **Continue** to create an access filter and ensure you see this message next time.

3. You will now need to specify which method to use when sourcing access filter records. The following options are available:

- **Manual** - this allows you to manually provide the access filter pairings, relying on you to maintain the records manually

over time. Generally this option is reserved for initial trials of access filters before moving to one of the alternative methods below.

- **Report** - this allows you to use the results of a report as the records of your access filter. You will need to have a report enabled for use in this way.
- **SQL Query** - this allows you to run an SQL query which returns the records for your access filter.
- **CSV** - this allows you to upload a CSV file to use as the records of your access filter.



Filter Parameters

Each Access Filter contains a list of one or more records matching a Yellowfin user to a Reference Id. These can be loaded into the system in three ways: manual entry, from a CSV file, or by running a scheduled query on the source database.

In each case you will need to enter records consisting of four fields (in this order):

| Identifier Type                                                                                                                                                                                                                                                                                                        | Identifier                                                          | Filter Type                                                                                                                                                                                                                                                                                       | Reference ID                                                                   |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <p>The Identifier Type and Identifier are used to identify a Yellowfin user.</p> <p>The Identifier Type can be either</p> <ul style="list-style-type: none"><li>◦ "Email Address",</li><li>◦ "Yellowfin Person ID", or</li><li>◦ "User ID".</li></ul> <p>The user id related to the user id used within Yellowfin.</p> | <p>The Identifier field will then be the corresponding user id.</p> | <p>The Filter Type field is used to determine what type of filter this is. This is critical to assist users when creating views or reports. Select a user friendly type name.</p> <p>To add or delete Filter Types, click the <b>Configure Reference Types</b> button on the Connection page.</p> | <p>The Reference Id field is the corresponding data for the matching user.</p> |

Manual Access Filters

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Create Access Filter

×

How do you want to specify filter records?

  
Manual

  
Report

  
SQL Query

  
CSV

Continue

## Settings

Complete the settings step in order to define how the access filter records will be sourced and updated.

| Setting         | Description                                                                                                                                                                                                                                                                 |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name            | Provide a name to help identify this access filter on the Connections and Task pages.                                                                                                                                                                                       |
| Reference Type  | Provide a label to help identify this access filter's values when linking it to a field in the view.<br><br>See the <a href="#">Configure Reference Types</a> section for more information.                                                                                 |
| Refresh Type    | You will have two refresh options: <ul style="list-style-type: none"><li>• <b>Append</b>: new access filter records will be added to the current list of records.</li><li>• <b>Overwrite</b>: new access filter records will replace the current list of records.</li></ul> |
| Update Reminder | Define a schedule that creates a system task as a reminder to update these records periodically.                                                                                                                                                                            |

## User

Search for the user you wish to assign a value to, selecting their name from the list.

Create Access Filter

×

Settings

Name

Country

Provide a name to help identify this access filter on the Connections and Task pages.

Reference Type

Country Name

▼

Provide a label to help identify this access filter's values when linking it to a field in the View.

Create new reference type.

Refresh Type

Append

Overwrite

New Access Filter values will be added to the current list of records.

Update Reminder

Define a schedule that creates a system task as a reminder to update these records periodically.

Assignee

Monthly

▼

Day: 1

Advanced settings ↓

This will run every month, on the 1st day of the month .

Input Values

Create Access Filter

SettingsInput ValuesRecordsUsage

People

Jessica Flower

Mr Administrator

Sammy Jones

Teresa Pringle

Violet Southgate

## Value

You will now be able to define the value to be associated with each user. You can only have one value per row, so if you want a user to have multiple values you will need to add their name multiple times.

Create Access Filter

Settings

Input Values

Records

Usage

Teresa Pringle

Australia

Search

Submit

## Records

You will now be able to view all the records loaded into your Access Filter.

Create Access Filter

Settings

Input Values

Records

Usage

| Name           | Reference Type | Reference Id |
|----------------|----------------|--------------|
| Teresa Pringle | Country Name   | Australia    |

Usage

You will be able to see a usage count to help identify how and when your Access Filter is used.

Create Access Filter

Settings

Input Values

Records

Usage

| View                                     | Field | Usage |
|------------------------------------------|-------|-------|
| This access filter is not currently used |       |       |

Report Access Filters

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Create Access Filter

×

How do you want to specify filter records?


Manual


Report


SQL Query


CSV

Continue

## Settings

Complete the settings step in order to define how the access filter records will be sourced and updated.

| Setting                 | Description                                                                                                                                                                                                                                                                |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>             | Provide a name to help identify this access filter on the Connections and Task pages.                                                                                                                                                                                      |
| <b>Select a Report</b>  | Select a report that has been enabled as an access filter source.                                                                                                                                                                                                          |
| <b>Refresh Type</b>     | You will have two refresh options: <ul style="list-style-type: none"> <li><b>Append:</b> new access filter records will be added to the current list of records.</li> <li><b>Overwrite:</b> new access filter records will replace the current list of records.</li> </ul> |
| <b>Refresh Schedule</b> | Define whether access filter records will automatically be updated based on a schedule.                                                                                                                                                                                    |

## Report

In order to select a report to use for access filter records, you will have to have a report saved with this setting enabled.

Create Access Filter

×

Settings

Name

Countries

Provide a name to help identify this access filter on the Connections and Task pages.

Select a Report

Access Filter Values

Select a report that has been enabled as an access filter source.

Create report now

Refresh Type

Append
☒
Overwrite
☐

New Access Filter values will be added to the current list of records.

Refresh Schedule

☐

Don't update the access filter records based on a schedule.

Submit

Save Report

Details

Distribution Settings

Settings

Refresh

Browse Page

This report will appear on the Browse Page.

Dashboard

This report can be displayed on Dashboard Tabs.

Use as View

This report can't be used as a view for other reports.

Access Filters

The results of this report can be used as a source for access filter records.

Save As Draft

The report may look something like this:

| IDENTIFIER TYPE | IDENTIFIER                    | REFERENCE TYPE | REFERENCE ID |
|-----------------|-------------------------------|----------------|--------------|
| EMAIL           | A.Benassouy@yellowfin.b       | CountryISO     | AU           |
| EMAIL           | A.Abad Jose@yellowfin.b       | CountryISO     | AU           |
| EMAIL           | A.Sebast.Bon@yellowfin.b      | CountryISO     | AU           |
| EMAIL           | A.Becor Khrbach@yellowfin.b   | CountryISO     | AU           |
| EMAIL           | A.Horde Udoop@yellowfin.b     | CountryISO     | AU           |
| EMAIL           | Adby.Hughes@yellowfin.b       | CountryISO     | AU           |
| EMAIL           | Adas.Mohana@yellowfin.b       | CountryISO     | AU           |
| EMAIL           | Adgail.Cameron@yellowfin.b    | CountryISO     | AU           |
| EMAIL           | Adgail.Fisher.gou@yellowfin.b | CountryISO     | AU           |
| EMAIL           | Achilo.Podgzzai@yellowfin.b   | CountryISO     | AU           |
| EMAIL           | Adam.Aalsson@yellowfin.b      | CountryISO     | AU           |
| EMAIL           | Adam.Beausgard@yellowfin.b    | CountryISO     | AU           |
| EMAIL           | Adam.Cesar@yellowfin.b        | CountryISO     | AU           |
| EMAIL           | Adam.Gelaty@yellowfin.b       | CountryISO     | AU           |
| EMAIL           | Adam.Vojtosz@yellowfin.b      | CountryISO     | AU           |
| EMAIL           | Adrian.Wolnow@yellowfin.b     | CountryISO     | AU           |

Records

You will now be able to view all the records loaded into your Access Filter.

Create Access Filter

Settings

Records

Usage

Name

Reference Type

Reference Id

Teresa Pringle

CountryISO

AU

Usage

You will be able to see a usage count to help identify how and when your Access Filter is used.

| Create Access Filter |                 |       |
|----------------------|-----------------|-------|
| Settings             | Records         | Usage |
| View                 | Field           | Usage |
| Ski Team             | Athlete Country | 0     |

## SQL Query Access Filters

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Create Access Filter

How do you want to specify filter records?

Manual

Report

SQL Query

CSV

Continue

## Settings

Complete the settings step in order to define how the access filter records will be sourced and updated.

| Setting                      | Description                                                                                                                    |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                  | Provide a name to help identify this access filter on the Connections and Task pages.                                          |
| <b>Data Source</b>           | Select a source that will be queried to return access filter records.                                                          |
| <b>New User Auto Refresh</b> | Define whether the access filter records need to be automatically refreshed every time a new user is created.                  |
| <b>SQL Query</b>             | Define the query used to return access filter values, in the format outlined in the <a href="#">Filter Parameters</a> section. |

Once the SQL has been defined, it will need to be validated. Click the **Validate** button and you will either be shown errors returned from the database, or this valid message.

Create Access Filter

Settings

Name

User Country

Provide a name to help identify this access filter on the Connections and Task pages.

Data Source

Ski Team

Select a source that will be queried to return access filter records.

New User Auto Refresh

Don't update the access filter records when a new user is created.

SELECT  
'EMAIL' AS IdentifierType,  
'PERSON"."FIRSTNAME" || ' ' || "PERSON"."LASTNAME" || '@yellowfin.bi' AS Identifier,  
'Country/ISO' AS ReferenceType,  
'AU' AS ReferenceID  
FROM "PERSON"

View Sample Output

Validate

SQL Query Valid

View Edit

New User Auto Refresh

Don't update the access filter records when a new user is created.

Here is the data returned by your query:

|       |                               |             |    |
|-------|-------------------------------|-------------|----|
| EMAIL | Karl.Gegenschatz@yellowfin.bi | Country/ISO | AU |
| EMAIL | Carlos.Liendo@yellowfin.bi    | Country/ISO | AU |
| EMAIL | Paul.Vachoux@yellowfin.bi     | Country/ISO | AU |
| EMAIL | Gert.Dogscha@yellowfin.bi     | Country/ISO | AU |
| EMAIL | Kjell.Woerner@yellowfin.bi    | Country/ISO | AU |

Do you want to continue?

Cancel

Ok

| Setting                 | Description                                                                                                                                                                                                                                                                |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Refresh Type</b>     | You will have two refresh options: <ul style="list-style-type: none"> <li><b>Append</b>: new access filter records will be added to the current list of records.</li> <li><b>Overwrite</b>: new access filter records will replace the current list of records.</li> </ul> |
| <b>Refresh Schedule</b> | Define whether access filter records will automatically be updated based on a schedule.                                                                                                                                                                                    |

Once complete, use the **Submit** button to save your access filter and load values.

Create Access Filter

Settings

Name

User Country

Provide a name to help identify this access filter on the Connections and Task pages.

SQL Query Valid

View Edit

New User Auto Refresh

Don't update the access filter records when a new user is created.

Refresh Type

New Access Filter values will replace the current list of records.

Append

Overwrite

Refresh Schedule

Automatically update the access filter records based on the schedule defined below.

Daily

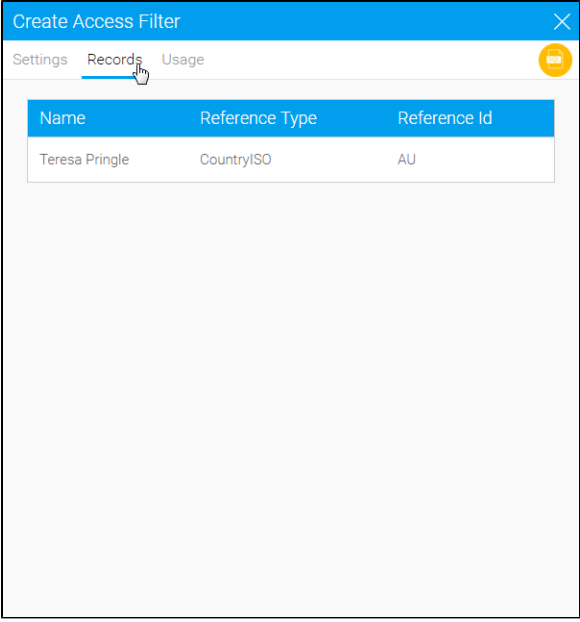
Advanced settings

This will run daily.

Submit

## Records

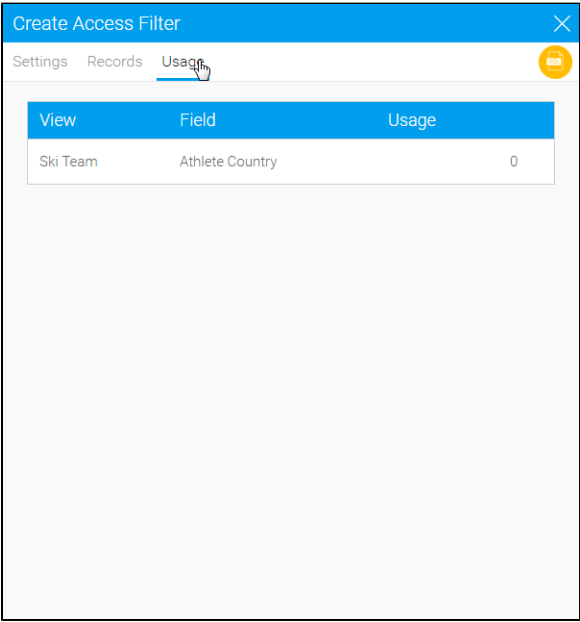
You will now be able to view all the records loaded into your Access Filter.



| Name           | Reference Type | Reference Id |
|----------------|----------------|--------------|
| Teresa Pringle | CountryISO     | AU           |

## Usage

You will be able to see a usage count to help identify how and when your Access Filter is used.



| View     | Field           | Usage |
|----------|-----------------|-------|
| Ski Team | Athlete Country | 0     |

## CSV Access Filters

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The file must consist of records of the four fields listed above. The file may contain a header row, which must have the titles "Identifier Type", "Identifier", "Reference Type" and "Reference Id".

Create Access Filter

How do you want to specify filter records?

Manual

Report

SQL Query

CSV

Continue

## Settings

Complete the settings step in order to define how the access filter records will be sourced and updated.

| Setting                | Description                                                                                                                                                                                                                                                                |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>            | Provide a name to help identify this access filter on the Connections and Task pages.                                                                                                                                                                                      |
| <b>File</b>            | Upload a csv file to provide values for the access filter records, in the format outlined in the <a href="#">Filter Parameters</a> section                                                                                                                                 |
| <b>Refresh Type</b>    | You will have two refresh options: <ul style="list-style-type: none"> <li><b>Append:</b> new access filter records will be added to the current list of records.</li> <li><b>Overwrite:</b> new access filter records will replace the current list of records.</li> </ul> |
| <b>Update Reminder</b> | Define a schedule that creates a system task as a reminder to update these records periodically.                                                                                                                                                                           |

Create Access Filter

Settings

Name

Country Values

Provide a name to help identify this access filter on the Connections and Task pages.

File Uploaded Successfully

accessfilter.csv

Replace

Refresh Type

Append

Overwrite

Update Reminder

Define a schedule that creates a system task as a reminder to update these records periodically.

Submit

## Records

You will now be able to view all the records loaded into your Access Filter.

| Create Access Filter |                |              |
|----------------------|----------------|--------------|
| Settings             | Records        | Usage        |
| Name                 | Reference Type | Reference Id |
| Teresa Pringle       | CountryISO     | AU           |

## Usage

You will be able to see a usage count to help identify how and when your Access Filter is used.

| Create Access Filter |                 |       |
|----------------------|-----------------|-------|
| Settings             | Records         | Usage |
| View                 | Field           | Usage |
| Ski Team             | Athlete Country | 0     |

## Assign to a View

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Once you have set up one or more Access Filters on a data source, you can assign them to any views created against that source.

1. Create your view as normal, and then on the Fields page, select a field that corresponds to one of the Reference Types you have created.
2. On the Access tab, select the correct type from the Access Filter selection. You will not be able to select Reference Types that don't have any filter records saved against them.
3. Once you have selected the Access Filter, save the field. You can select more than one field to be different Access Filter types if you wish.
4. Once you have finished assigning access filter types to the fields on the view, go to the View Security page. You can select a default filter to be applied to reports created against this view here, or choose not to have one. If you select a default filter, any subsequent report created against this view will have the filter applied. Users creating reports that have the appropriate access level can change or remove the filter on a per-report basis.

## Assign to a Report

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When creating a report using the Drag and Drop Builder, an Access Filter can be applied if the selected View has had Access Filters defined.

On the Report Data page, open the Report Data section in the Report Options box on the right hand side. The Access Filter selection box contains any filters that have been attached to the selected view.

If you select a filter, it will be applied to the results for each user when they run the report.

**Note:** that only users with the appropriate security access level will be able to change the Access Filter on a report.

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