

# Available Security Functions

## Overview

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The following is a list of security functions available in Yellowfin and their associated definitions. They have been grouped into sub sections to assist you to identify how and when these functions are used.

| Function                             | Description                                                                                                         |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| <b>General</b>                       |                                                                                                                     |
| Report Access CRUD                   | Allow users to log in to Yellowfin and view, edit, create, and delete reports                                       |
| User Profile                         | Allow users to update their user profile                                                                            |
| Draft Content List                   | Shows a list of draft content on the Dashboard and Browse pages.                                                    |
| Favourites                           | Allow users to add reports to their favourites list                                                                 |
| Export Reports to CSV                | Allow users to export report results to CSV                                                                         |
| Export Reports and Dashboards to DOC | Allow users to export content items to DOC                                                                          |
| Export Content to PDF                | Allow users to export content items to PDF                                                                          |
| Export Reports and Dashboards to XLS | Allow users to export content items to XLS                                                                          |
| Bookmarks and Snapshots              | Allows users to create and use bookmarks and snapshots                                                              |
| Hide Print on Reports & Dashboards   | Hides the Print option on the Report and Dashboard pages.                                                           |
| <b>Dashboard</b>                     |                                                                                                                     |
| Personal Dashboard CRUD              | Gives users access to the dashboard page, and allows them to create their personal dashboard, visible only to them. |
| Hide Dashboard Maximise Report       | Hide the maximise option on dashboard reports                                                                       |
| Hide Dashboard Report Menu           | Hide the drop-down menu on reports on the dashboard                                                                 |
| Refresh Dashboard Reports            | Allow users to set a refresh period on Dashboard reports.                                                           |
| Public Dashboards CRUD               | Allows users to create and edit Public dashboards.                                                                  |
| Disable Add Existing Tab             | Prevents users from adding existing tabs from the Browse Page or the Pre-Built Tab option to their dashboard.       |
| Show Draft Dashboards                | Shows Dashboards being edited by other users.                                                                       |
| <b>Browse</b>                        |                                                                                                                     |
| Hide Browse Page                     | Hide the report browse page                                                                                         |
| Hide Advanced Report Search          | Hide the advanced search on the report list page                                                                    |
| Hide Columns Option (Browse Page)    | Hide the columns option on the report list page. Users will not be able to change the columns displayed             |
| Hide Report Details (Browse Page)    | Hide the report details on the report list page                                                                     |
| Approval Administration              | Allow users to see outstanding report approvals                                                                     |
| Draft Public Reports                 | Allow users to see draft versions of public reports created by other users                                          |
| <b>Report Builder</b>                |                                                                                                                     |
| Report Types                         | Allow users to create freehand SQL reports, and Jasper reports                                                      |

|                                      |                                                                                                                                                                                   |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public Reports CRUD                  | Allow users to create and edit public reports                                                                                                                                     |
| Versioned Reports                    | Allows users to archive report result sets, dependent on Content Category Version History settings                                                                                |
| Sub Queries                          | Allow users to create sub query reports                                                                                                                                           |
| Ad Hoc Reports                       | Allows users to create Ad Hoc reports                                                                                                                                             |
| Access Filter                        | Allow users to set or change the access filter on reports                                                                                                                         |
| Related Reports                      | Allow users to set up co-display, drill down and drill through functionality                                                                                                      |
| CSV Reports                          | Allow users to write reports based on CSV files                                                                                                                                   |
| Advanced CSV Functionality           | Allow users to perform advanced operations on CSV reports such as selecting the data source                                                                                       |
| Custom Query Filters                 | Allow users to create user prompt drop down filters populated by custom SQL queries                                                                                               |
| Min/Max default filter values        | Allows users to set default values for cached filters to the minimum and maximum cached value.                                                                                    |
| Disable Cached Filter Values         | Disable users from caching report filter values                                                                                                                                   |
| SSRS Reports                         | Allows users to create SSRS Reports                                                                                                                                               |
| Allow Freehand SQL Calculated Fields | Allows users to create Freehand SQL Calculated Fields in reports.                                                                                                                 |
| <b>Report Menu</b>                   |                                                                                                                                                                                   |
| Broadcast Reports                    | Allow users to broadcast reports on a one off or scheduled basis                                                                                                                  |
| Distribute Reports                   | Allow users to distribute reports on dashboard tabs to other users                                                                                                                |
| Email Reports                        | Allow users to send an adhoc email copy of a report                                                                                                                               |
| Hide Open Report                     | Hide the open report menu item                                                                                                                                                    |
| Hide Report Details (Report Menu)    | Hide the report details item on the report menu                                                                                                                                   |
| Hide SQL                             | Hide report SQL from users.                                                                                                                                                       |
| Multicast Reports                    | Allow users to broadcast reports to external users                                                                                                                                |
| Multicast Access Filter Reports      | Allows users to broadcast reports with access filters to external users. The credentials of the user who creates the broadcast will be used to send the report to external users. |
| Hide Report Refresh                  | Hide the report refresh menu item                                                                                                                                                 |
| Hide Embed Links                     | Removes links to embed reports and dashboards using the Javascript API                                                                                                            |
| Hide External Links                  | Removes external direct links to reports and dashboards                                                                                                                           |
| <b>Storyboard</b>                    |                                                                                                                                                                                   |
| Storyboards CRUD                     | Allows users to view, create, edit or delete Storyboards.                                                                                                                         |
| Storyboard Admin                     | Allows users to edit and delete any private or public Storyboard.                                                                                                                 |
| Public Storyboards                   | Allows users to make a Storyboard public.                                                                                                                                         |
| Storyboard Global Filters            | Allows users to set global filters on Storyboards.                                                                                                                                |
| <b>Collaboration</b>                 |                                                                                                                                                                                   |
| Hide Comments                        | Hides the comment functionality from Reports, Storyboards, and Dashboards.                                                                                                        |
| Annotations CRUD                     | Allow users to Create, Read, Update, or Delete                                                                                                                                    |
| Timeline                             | Allows users to access their timeline.                                                                                                                                            |
| Connections                          | Allows users to connect to other users through their timeline.                                                                                                                    |
| Discussion Topics CRUD               | Allows users to browse and contribute to discussion topics.                                                                                                                       |
| Collaboration Admin                  | Allow users full administration access to discussion streams, comments, and tasks both public and private.                                                                        |

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|---------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Activity Stream                 | Allows users to access the activity stream.                                                                        |
| Enable Tasks                    | Allow users to see and be assigned tasks.                                                                          |
| Personal Tasks                  | Allow users to create and assign tasks to themselves.                                                              |
| Public Tasks                    | Allow users to create and assign tasks to themselves and others.                                                   |
| System Task Admin               | Allow users to approve or reject the completion of system tasks.                                                   |
| <b>Configuration</b>            |                                                                                                                    |
| Configuration                   | Allow users to modify Yellowfin site parameters                                                                    |
| Configure Logon ID              | Allow users to specify how users are authenticated                                                                 |
| Configure Page Format           | Allow users to configure the page layout (integration settings, etc)                                               |
| Configure Support Email         | Allow users to set the support email address                                                                       |
| <b>Administration</b>           |                                                                                                                    |
| Import                          | Allow users to import content from XML files                                                                       |
| Export                          | Allow users to export content to XML files for backup or transfer to another system                                |
| Folder Access                   | Allow users to configure report categories                                                                         |
| System Information              | Allow admin users to view system information                                                                       |
| Licence Management              | Allow users to view Yellowfin licence details and upload new licence files                                         |
| Create and Edit Tags            | Allow users to create and edit tags used in discussions                                                            |
| Client Organisation Management  | Allow users to set up and manage client organisations.                                                             |
| Filter Period Management        | Allow users to choose which Predefined Date Filters are available                                                  |
| Translate Content               | Allows users to translate user entered data on dashboards, reports and views.                                      |
| Themes CRUD                     | Allows users to manage Storyboard Themes.                                                                          |
| Geometry Pack Management        | Allows users to import and delete GeoPacks.                                                                        |
| Background Execution Management | Allows users to view the current background execution queue, cancel current queries, and force start queued items. |
| View and Field Categories       | Allows users to manage View and Field Categories from the Admin Console.                                           |
| Org Reference Codes             | Allows users to manage Org Reference Codes from the Admin Console.                                                 |
| Plugin Management               | Allows users to manage plugins including Third Party Source Connctions, JDBC Drivers, and Advanced Functions.      |
| <b>Data Sources &amp; Views</b> |                                                                                                                    |
| Data Sources CRUD               | Allow users to create, edit, and delete data source connections                                                    |
| OLAP                            | Allow users to connect to OLAP data sources                                                                        |
| Data Source Admin CRUD          | Allow users to create, edit, and delete all data sources regardless of security restrictions                       |
| Source Filters                  | Allow users to create data source filters                                                                          |
| Database Views CRUD             | Allow users to create, edit, and delete Yellowfin views                                                            |
| Freehand SQL Views              | Allow users to create Freehand SQL views.                                                                          |
| Show Draft Views                | Allow users to see views being edited by other users                                                               |
| Stored Procedures               | Allow users to create views against stored procedures                                                              |
| Force Clone Views               | Removes the option to edit existing views directly - users are forced to clone views to edit them                  |
| Hide DBMS Messages              | Replaces error messages from DBMS with generic messages                                                            |
| Create CSV Table                | Allow users to create CSV tables within a view                                                                     |

|                              |                                                                                                    |
|------------------------------|----------------------------------------------------------------------------------------------------|
| Composite Views              | Allows users to create Composite Views.                                                            |
| Skip Schema Check            | Bypass schema check when using CheckSchemaForUser functionality.                                   |
| Report as a Datasource       | Allows reports to be written against the results of another report                                 |
| <b>User Administration</b>   |                                                                                                    |
| User Management CRUD         | Allow users to create, edit, and delete user accounts                                              |
| Group Management CRUD        | Allow users to create, edit, and delete user groups                                                |
| Roles Management             | Allow users to create, edit, and delete security roles                                             |
| Hide profile password        | Removes the password reset option in My Profile                                                    |
| Disable profile email change | Stops users from changing their email address in My Profile                                        |
| Hide profile User ID         | Removes the User ID option in My Profile                                                           |
| Named User                   | Allows a user to bypass concurrent logon limitations.                                              |
| Restrict Visible Roles       | Restricts the Roles that are visible to a user when adding new users and groups.                   |
| <b>Web Services</b>          |                                                                                                    |
| Web Services                 | This function is required for a user account that will be used to log in to Yellowfin web services |
| Disable Mobile Access        | Stops a user from accessing reports via a native mobile application.                               |
| <b>Other</b>                 |                                                                                                    |
| Subscribe to Broadcast       | Allows users to subscribe to report broadcasts.                                                    |

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