

# Broadcasting Secure PDFs

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## Overview

When broadcasting PDF files, you can password-protect them to ensure that they can only be viewed by specific people. This is ideal when transferring reports containing sensitive information.

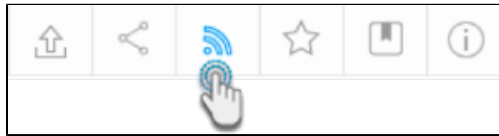
There are 3 ways to make your PDFs secure:

- **Create a report password:** Set a password when exporting the file, and use it on broadcasted PDFs.
- **Create a broadcast password:** Specify a new password when broadcasting the file.
- **Use the system generated password:** Use the default password provided by Yellowfin, instead of creating one of your own. However, you can always change the default password through the Administration module.

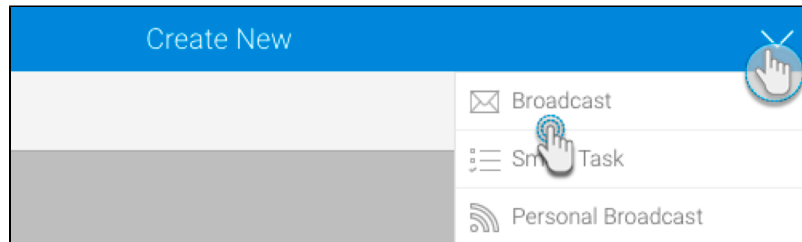
## Securing PDF Files During Broadcast

Make your PDF files more secure by setting a password when broadcasting them. This guide will show you how.

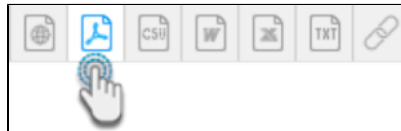
1. Click on the **Broadcast** icon in your Report Builder.



2. Click on the **Create** button, and then on Broadcast.



3. In the new pop up, provide the broadcast details, as you normally would. Click [here](#) for more information on how to do this.
4. Select the **PDF** icon.

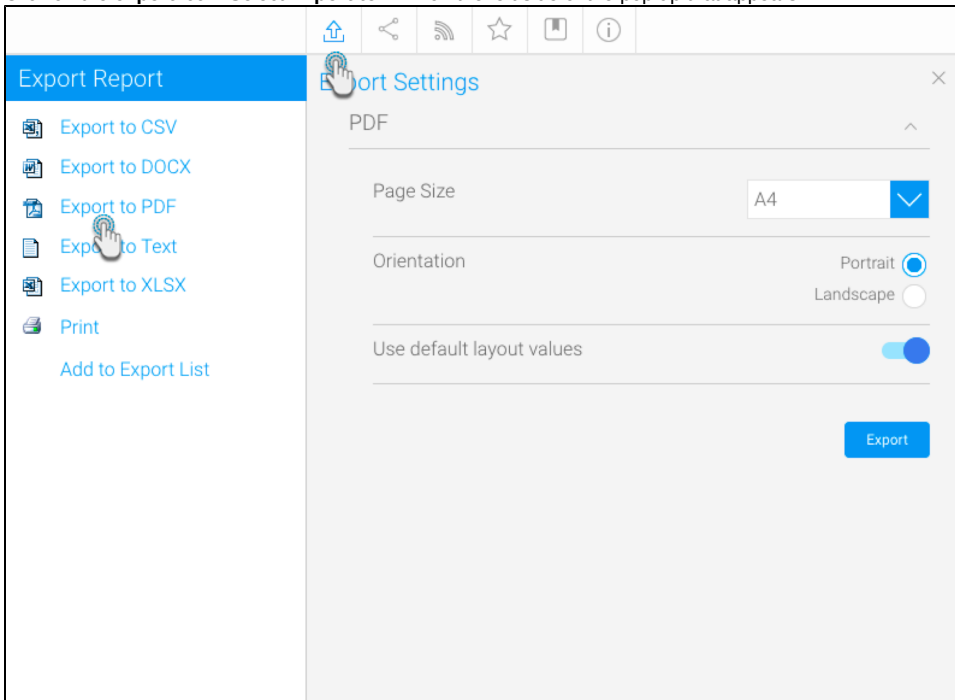


5. On doing so, additional details will appear. If your file is already secured with a report password, then the **Secure PDF** checkbox will be auto selected. But if not, select this checkbox. Additional settings will appear.
6. Specify a password source. Below is a description of the three options:
  - a. To specify your own unique password to secure this PDF, choose the **Set up a password for this broadcast** option. Enter the password in the PDF Password field.
  - b. To use the report password that was created when the PDF was exported, select the **Use report's PDF password** option. You will be able to see this password in the below field. **Note:** This option only appears if the file has a report password specified. Refer to our [tutorial](#) on how to create this password.
  - c. To use the default system password, choose the **Use default PDF password** option. You can note down this password when it appears in the below field. **Note:** This option only appears if there is a default password specified in the system. Refer to [this](#) section to learn how to change it.
7. Continue specifying the remaining details of the [broadcast](#), as you normally would.
8. Once done, click on the **Submit** button. Your secure PDF will be sent to the recipients when it's scheduled to be broadcasted.

## Creating a Report Password

This tutorial will guide you through the process of creating a report password when exporting the report into a PDF file. This password will be required every time the PDF is accessed.

1. Once you have created your report, and when it's time to export it into a PDF file, follow the steps below:
2. Click on the **export** icon. Select **Export to PDF** on the left side of the pop up that appears.



3. Disable the **Use default layout values** toggle to select your preferred layout settings. Doing so will display additional export settings. From this list, enable the **Secure PDF** toggle.

4. Provide a password for this file in the new text field.

Use default layout values ☐

Shrink to fit page width ☐

Scale large images to page width ☐

Page break for report sections ☐

Page break for Co-Display reports ☐

Force regular page breaks to reduce chart/table overlap ☐

Secure PDF ☒

PDF Password

Define Maximum Image Sizes ☐

Define Header/Footer Sizes ☐

[Export](#)

5. Click on the **Export** button to export this file, saving the password. **Note:** This step is mandatory for the password to be saved.
6. Now when any user tries to access this PDF file, they will need to provide this password.

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## Updating the Default Password

Yellowfin has a default password used to secure PDF files. You can simply use this password, instead of providing one of your own. However, changing this default password is also a possibility. Here's how you can go about changing it:

1. Navigate to the Configuration page. (Left side menu > Administration > Configuration.)
2. Access the system settings, by clicking on the **system** icon.

3. Expand the **PDF Export Defaults** option.



4. Scroll down to the **PDF Password** setting, and enter a password in the field. (Make sure to select a secure password.)

|                                                                     |                                        |
|---------------------------------------------------------------------|----------------------------------------|
| PDF Password<br>Define a password to be used to secure PDF exports. | <input type="text" value="Access505"/> |
|---------------------------------------------------------------------|----------------------------------------|

5. Click **Save** to update the default password.  
6. Users would require this password to open Yellowfin reports exported as PDF files.