

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.

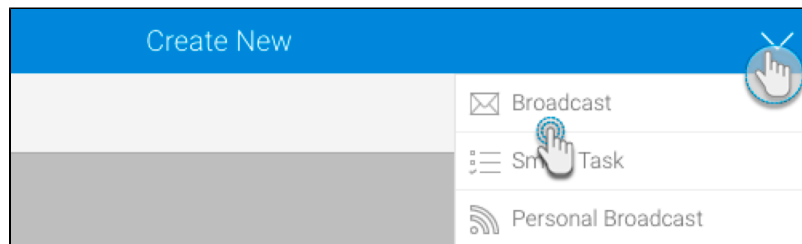
Securing PDF Files During Broadcast

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

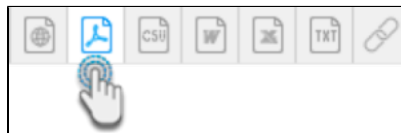
1. Click on the **Broadcast** icon in your Report Builder.



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.

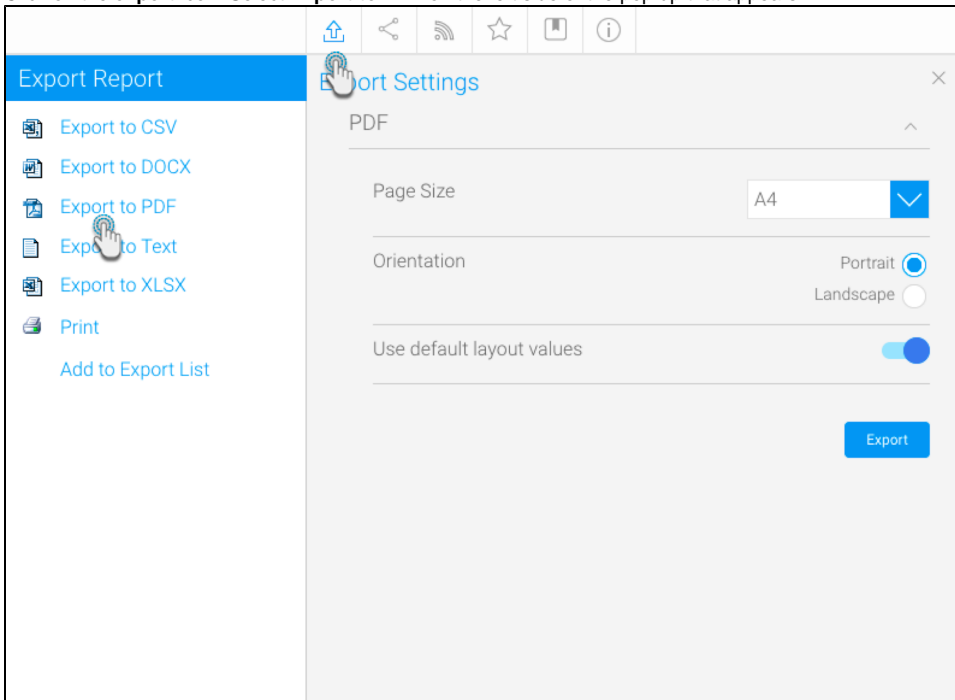


5. On doing so, additional details will appear. If your file is already secured with a report password, then the **Secure PDF** checkbox will be auto selected. But if not, select this checkbox. Additional settings will appear.
6. Specify a password source. Below is a description of the three options:
 - 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

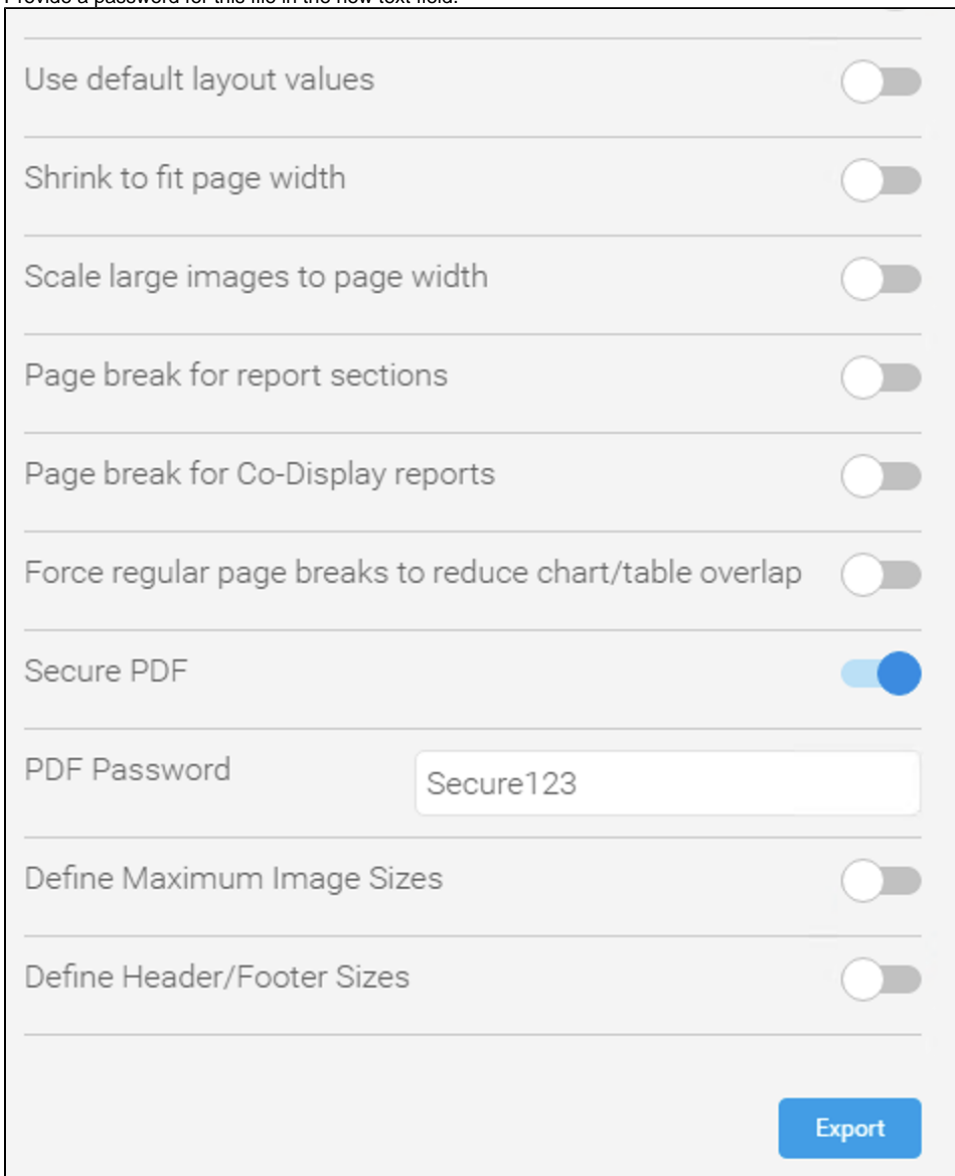
This tutorial will guide you through the process of creating a report password when exporting the report into a PDF file. This password will be required every time the PDF is accessed.

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.



The screenshot shows a configuration dialog box for exporting a PDF. It contains several toggle switches and a text input field. The toggles are: 'Use default layout values' (off), 'Shrink to fit page width' (off), 'Scale large images to page width' (off), 'Page break for report sections' (off), 'Page break for Co-Display reports' (off), 'Force regular page breaks to reduce chart/table overlap' (off), 'Secure PDF' (on), 'Define Maximum Image Sizes' (off), and 'Define Header/Footer Sizes' (off). The 'Secure PDF' toggle is highlighted in blue. Below the toggles is a text input field labeled 'PDF Password' containing the text 'Secure123'. At the bottom right is a blue 'Export' button.

Use default layout values	<input type="checkbox"/>
Shrink to fit page width	<input type="checkbox"/>
Scale large images to page width	<input type="checkbox"/>
Page break for report sections	<input type="checkbox"/>
Page break for Co-Display reports	<input type="checkbox"/>
Force regular page breaks to reduce chart/table overlap	<input type="checkbox"/>
Secure PDF	<input checked="" type="checkbox"/>
PDF Password	<input type="text" value="Secure123"/>
Define Maximum Image Sizes	<input type="checkbox"/>
Define Header/Footer Sizes	<input type="checkbox"/>

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 Define a password to be used to secure PDF exports.	<input type="text" value="Access505"/>
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5. Click **Save** to update the default password.
6. Users would require this password to open Yellowfin reports exported as PDF files.