Available Security Functions

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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.

> ⚠️ The available roles that you see on your Yellowfin instance will depend on your Yellowfin Suite license. If you do not see a role, then ensure that you have the proper license for it.

Function	Description
General	
Report Access CRUD	Allows users to log in to Yellowfin and view, edit, create, and delete reports.
User Profile	Allows users to update their user profile.
Draft Content List	This option has been replaced with other functionality in Yellowfin 9 and is currently not in use.
Favorites	Allows users to add reports to their favorites list.
Export Report Settings	Allows users to define the export settings for a report through the save menu, rather than relying on the system default.
Export Reports to CSV	Allows users to export report results to CSV.
Error Email Link	Does not show a link to send an email on the error page when something goes wrong.
Error Stacktrace	Shows a stack trace on the error page when something goes wrong.
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.
External Content	Allows users to embed content from external reporting tools. This lets you embed live reports from Tableau, Qlik, and PowerBI, directly into Yellowfin.
Dashboard	
Personal Dashboard CRUD	Gives users access to the dashboard page, and allows them to create their personal dashboard, visible only to them.
Hide Dashboard Maximize Report	Hides the maximize option on dashboard reports.
Hide Dashboard Report Menu	Hides the drop-down menu on reports on the dashboard.
Refresh Dashboard Reports	Allows 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	Checking this box shows other users' draft dashboards (if access has been granted to the published version).
	Unchecking this box hides all draft dashboards from other users. **A user can always see their own draft dashboards regardless of this setting.**
	Note that a dashboard can only ever have one draft. If one user has created a draft, no other user can create a draft, but they may be able to view and edit the draft that another user has created. See below for a full description.
	When this checkbox is checked:
	- User B can still create drafts from User A's published dashboard (that User A has given User B access to edit). - User B can view any drafts that User A has created (if User A has given User B access to a dashboard). - User A can always see User B's drafts of User A's dashboards. User A remains the owner of these drafts and can edit them at any time. - If User A edits User B's draft of User A's dashboard, User B can still see the draft.
	When this checkbox is unchecked:
	- User B can still create drafts from User A's published dashboard (that User A has given User B access to edit). - User B can **not** view any drafts that User A has created (even if User A has given User B access to a dashboard). - User A can always see User B's drafts of User A's dashboards. User A remains the owner of these drafts and can edit them at any time.
	If User A edits User B's draft of User A's dashboard, User B can still see the draft.
Code Mode	Allows users to edit dashboard in Code Mode. **Warning:** this should only be enabled for trusted developers. Learn more.
Broadcast Dashboards	Allows users to broadcast dashboards on a one-off or scheduled basis.
Subscribe to Dashboard Broadcasts	Allows users to subscribe to — and unsubscribe from — existing dashboard broadcasts.
Browse	
Hide Browse Page	Hides the report browse page.
Hide Advanced Report Search	Hides the advanced search on the report list page.
Hide Columns Option (Browse Page)	Hides the columns option on the report list page. Users will not be able to change the columns displayed.
Hide Report Details (Browse Page)	Hides the report details on the report list page.
Approval Administration	Allows users to see outstanding report approvals
Draft Public Reports	Allows users to see draft versions of public reports created by other users.
Report Builder	
Report Types	Allows users to create freehand SQL reports, and Jasper reports.
Public Reports CRUD	Allows 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	Allows users to create sub query reports.
Ad Hoc Reports	Allows users to create Ad Hoc reports.
Access Filter	Allows users to set or change the access filter on reports.
Related Content	Allows users to set up co-display, drill down and drill through functionality.

CSV Reports	Allows users to write reports based on CSV files.
Advanced CSV Functionality	Allows users to perform advanced operations on CSV reports such as selecting the data source.
Custom Query Filters	Allows 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	Disables 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.
Disable Freehand SQL Calculated Fields Injection Check	Allows users to skip the default checking of injection tokens within Freehand SQL calculated fields, such as excess whitespace ("SELECT ", " FROM ") and unexpected semi-colons and double-dashes. This checkbox should be left unchecked for users to maximise system security (to avoid exposure to SQL injection attacks). Only check this box for a user role when absolutely required, and ensure that your back-end database connection has the minimum required permissions on it.
JavaScript Charts	Allows users to switch on the JavaScript chart creation functionality in the report builder. (Learn more about this here.)
Save To Disk Broadcast	Allows users to schedule broadcasts to the server's local disk.
Report Menu	
Share Private Content	Allows users to share private reports with other users. Note that if disabled, private reports cannot be shared with anyone.
Broadcast Reports	Allows 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	Allows users to send an adhoc email copy of a report.
Hide Open Report	Hides the open report menu item.
Hide Report Details (Report Menu)	Hides the report details item on the report menu.
Hide SQL	Hides report SQL from users.
Multicast Reports	Allows 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	Hides 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.
Storyboard	
Distribute Storyboards	Allows users to distribute Storyboards to other users.
Email Storyboards	Allows users to send an ad-hoc email copy of a Storyboard.
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.
Collaboration	
Hide Comments	Hides the comment functionality from Reports, Storyboards, and Dashboards.
Annotations CRUD	Allows 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.
Activity Stream	Allows users to access the activity stream.
Enable Tasks	Allows users to see and be assigned tasks.
Personal Tasks	Allows users to create and assign tasks to themselves.
Public Tasks	Allows users to create and assign tasks to themselves and others.
System Task Admin	Allows users to approve or reject the completion of system tasks.
Configuration	
Configuration	Allows users to modify Yellowfin site parameters.
Configure Logon ID	Allows users to specify how users are authenticated.
Configure Page Format	Allows users to configure the page layout (integration settings, etc).
Configure Support Email	Allows users to set the support email address.
Header/Footer Admin	Allows users to edit the header and footer on their system.
Administration	
Content Super User	This role function is only visible when the Allow Content Super User setting is enabled within the Admin Console. A super user can view and delete content across the board, overriding any other config settings related to viewing and managing content. This includes the XML export of private content. Therefore, any user roles given this function have full access to all content, whether private or public, within an organisation. When this function is included in a user role, the role cannot be deleted. Remember, changes at the role level won't take effect for a user until their next successful login.
Approval Admin	Allows users to manage outstanding content approvals without having to be specified as the approver.
Import	Allows users to import content from XML files.
Export	Allows users to export content to XML files for backup or transfer to another system.
Folder Access	Allows users to configure report categories.
System Information	Allows admin users to view system information.
License Management	Allows users to view Yellowfin licence details and upload new license files.
Create and Edit Tags	Allows users to create and edit tags used in discussions.

Client Organisation Management CRUD	Allows users to set up and manage client organisations.
Filter Period Management	Allows 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 Connections, JDBC Drivers, and Advanced Functions.
Save Corporate Images	Allows users to upload and edit corporate images within the Image Manager.
Data Sources & Views	
Data Sources CRUD	Allows users to create, edit, and delete data source connections.
OLAP	Allows users to connect to OLAP data sources.
Data Source Admin CRUD	Allows users to create, edit, and delete all data sources regardless of security restrictions.
Source Filters	Allows users to create data source filters.
Database Views CRUD	Allows users to create, edit, and delete Yellowfin views.
Freehand SQL Views	Allows users to create Freehand SQL views.
Show Draft Views	Allows users to see views being edited by other users.
Stored Procedures	Allows 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	Allows users to create CSV tables within a view.
Composite Views	Allows users to create Composite Views.
Data Transformations	Allows you to access the Data Transformation module.
Skip Schema Check	Bypasses schema check when using CheckSchemaForUser functionality. The **CheckSchemaForUser** functionality, when enabled, runs a schema test to check if a user has permission to access tables and columns referenced by a Yellowfin report or view. If the **Skip Schema Check** function is enabled for a user, this test is bypassed, granting them access to the content. This is ideal in situations where column or table names get changed or are deleted after view creation, and the user is no longer permitted to access them. With this role, a user can access and update the column/table name at the view. Note that this role function is only operational if the CheckSchemaForUser functionality is enabled.

Report as a Datasource	Allows reports to be written against the results of another report.
User Administration	
User Management CRUD	Allows users to create, edit, and delete user accounts.
Group Management CRUD	Allows users to create, edit, and delete user groups.
Roles Management	Allows 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.
Web Services	
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.
Augmented Data Discovery	
Assisted Discovery	Allows you to access the Smart Analysis button in the report builder.
Instant Insight	Allows you to access the Auto Analyze option on charts.
Instant Insight Settings	Allows you to access the insight setting button in the view builder.
Signals	
Signals Consumer	Allows users to receive and explore Signals.
Configuration	Allows users to configure Signal analysis settings in the View Builder.
Distribute Signals	Allows users to share Signals.
Story	
Story CRUD	Allows users to view, create, edit or delete Stories.
Distribute Story	Allows users to share a published Story.
Story Admin	Allows users to edit and delete any private or public Stories.
Mobile	
Disable Mobile Access	Stops users from accessing any Yellowfin mobile apps, if selected.
Mobile Self Invite	Allows users to invite themselves to log into the mobile app through the onboarding method.
Mobile Admin	Allows admin users to access the Mobile Access Management page to manage all mobile users via the Yellowfin platform.
Other	

Subscribe to Broadcast	Allows users to subscribe to report broadcasts.