Configuration

- Overview
- Email
- System
- Region
- Authentication
- Integration

Overview

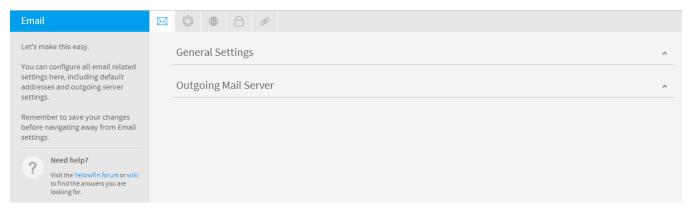
top
This page allows administrators to configure a wide range of settings that fall under the following tabs:



- 1. Email
- 2. System
- 3. Region
- 4. Authentication
- 5. Integration

Email

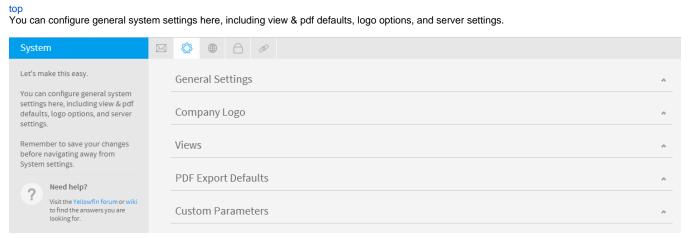
You can configure all email related settings here, including default addresses and outgoing server settings.



Option	Description
Support Email Address	Define the email address to receive support issue emails.
Email Notifications	Enable email notifications for various user events in the system.
Email Notification Display Name	Define the sender display name for Email Notifications.
Email Notification Address	Define the sender email address for Email Notifications.
Notification Settings	 Enable the events to send users email notifications for: User Account & Password Updates Content Distribution Comment Updates Timeline Updates Discussion Updates
Broadcast Display Name	Define the sender display name for Broadcast emails.
Broadcast Email Address	Define the sender email address for Broadcast emails.
Recipient Search	Allow users to search for recipients in the user list when sending an email.
Email Failure Notice Admin Recipient	Notify an Administrator of an email failure.

Failure Notice Recipient Send email in Background		Define the email address of an Administrator to receive email failure notifications.	
		Allow users to continue working in the system while an email is sent.	
Option	Description		
SMTP Server	Define the hostnan	ne or IP address of the outgoing mail server to be used to send emails.	
SMTP Port	Define the port to connect to the outgoing mail server on. Leave this blank to use the default SMTP port.		
SMTP Authentication	 Enable this option if your SMTP server requires authentication. You will then need to complete the following: User Name Password Confirm Password 		
SSL	Enable this option to use SSL when connecting to the outgoing mail server. The server must support SSL connections on the port specified above.		
Send STARTTLS	Enable this option to use the STARTTLS command when connecting to the outgoing mail server. The server must support this command.		
Test Email Address	Define an email address to send a test email to.		

System



Option	Description		
Colour Picker Standard Colours	Define the default colours to display in the colour picker, along with the chart colour defaults. There is room for six colours to be defined.		
Base Tags	 Included: Base tags will be included in the HTML of every page. This can be useful for debugging purposes, but may cause issues if proxy servers or load balancers are in use. Excluded: Base tags will be excluded from the HTML of every page. Commented (default): Base tags will be included in the HTML of every page, but will be commented out. This can be useful for debugging purposes. 		
External Instance Base URL	Define the external URL used to access this instance. This should be a link all users can access. It's used for embed script links, direct links, and links sent via email.		
External API cookie timeout	When using the Javascript API, a browser cookie is used to store the user's login details. Define the time, in seconds, the cookie is valid. Use zero to disable the cookie.		
Outgoing Proxy Server	Define this if the Yellowfin server should connect to the internet via a proxy server. For example, when connecting to WMS servers.		
Extended Logging	Enable extended logs - when an event is logged to the Event table additional information such as names and descriptions of users, data sources, views, reports, or dashboards will be included. This can have an impact on performance.		

Restricted Roles	Specify which roles can be hidden from specified Administrator roles.
Terms & Conditions	Provide business Terms & Conditions that a user must agree to before logging in to the system for the first time. (Optional)
Administration Tour Select the storyboard to be used for guiding users through the Administration area. (Optional)	

Option	Description
Company Logo Image Upload an image file to be used as the Company Logo in Reports.	
Client Organisation Logo Image	Enter an absolute URL used to retrieve the client logo. ## will be replaced by the relevant Client Reference Id. eg:
	http://localhost/myimage?ref=##
Logo Image Scale Factor Define the percentage the Logo Image will be scaled to.	

Option	Description	
Filter Views by Category Display the View list in Administration grouped by Source and View Category.		
Table List Length Define the number of tables displayed at once in the Database Tables list on Step 1 of the Drag & Drop V		
Database Column Order Display the columns within a database table in alphabetical or native order when viewed in the View Builde		
Report View List Sort	Define the sort order the list of available views on the Report Initialisation page.	

Option	Description	
Page Size	Select the default paper size to be used for PDF exports.	
Page Orientation Select the default paper orientation to be used for PDF exports.		
Shrink to fit page width	Define if content should be shrunk to fit on a page, or displayed as is - possibly cutting content if too large.	
Header Height	Define the default height (pixels) of page headers in PDF exports.	
Footer Height Define the default height (pixels) of page footers in PDF exports.		
Scale Images Display images at their full resolution or scale them down to avoid them being cut off if too large.		
Maximum Image Width	Define the maximum image width (pixels) for use in PDF exports.	
Maximum Image Height Define the maximum image height (pixels) for use in PDF exports.		
Report Section Page Break	Define whether each Report Section will start directly below the end of the previous section in a PDF export or on the next page.	
Co-Display Report Page Break	Define whether each Co-Display Report will start directly below the end of the previous section in a PDF export or on the next page.	
PDF Password	Define a password to be used to secure PDF exports. (Optional)	

Option	Description	
Custom Parameters	These are used as part of the Link to URL function, allowing you to use a variable as part of a link in a field.	

Region

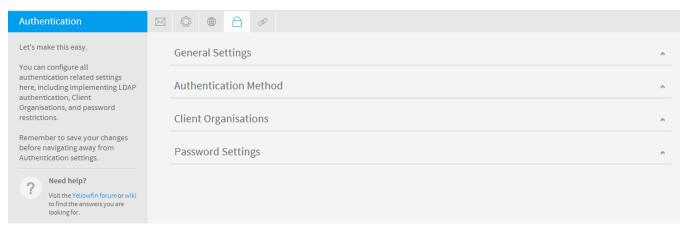
top
You can configure all region related settings here, including time & date and language specific text settings.



Option	Description	
Default User Time Zone	Specify the default Time Zone to be initially assigned to users until they customise the setting.	
Date Format	Specify the default date format to be used throughout the system.	
Week Start Day	Specify the first day of the week, to be used for predefined date filters.	
Financial Year Start Date	Specify the first day of the financial year for use in predefined date filters	
Option	Description	
Name Format	Specify the default format to be used when displaying a user's full name in the system.	
Decimal Separator Specify the default decimal separator character to be used in the system.		
Thousand Separator	Specify the default thousand separator character to be used in the system.	
Default CJK Font	Specify the default CJK font to be used in the system if Chinese, Japanese, Korean, or Vietnamese characters required.	are
Allow Users to set CJK Allow users to specify their preferred CJK font, rather than using the system defined font. Font		
Option	Description	
Multi-language Deploymer	ti-language Deployment Enable Content Translation so advanced users to provide alternate text to be displayed for additional languages.	
_anguages Specify the languages users may translate content to.		

Authentication

top
You can configure all authentication related settings here, including implementing LDAP authentication, Client Organisations, and password restrictions.



Option Description

Logon ID	ID Specify whether users log in to the system with an email address or username.		
Allow External Access Direct links to unsecured content can be shared with anyone.			
Multiple Login Logic	Define what happens when a user tries to log in at one location, when they're already logged in somewhere else.		
Option	Description		
User Authentication	Define whether system or LDAP authentication will be used during the login process.		

See LDAP Authentication for more information.

Option	Description	
LDAP Host	The Hostname or IP address of the LDAP server.	
LDAP Port	The TCP port that the LDAP service is listening on.	
Encryption	The encryption method implemented by the LDAP server.	
LDAP Base DN	The LDAP node that all users and groups are contained within.	
LDAP Group	Only members of this group will be able to login to Yellowfin.	
LDAP Bind User	An LDAP user with rights to search the LDAP directory.	
LDAP Bind Password The password for the LDAP Bind User defined above.		
LDAP Search Attribute	The LDAP attribute that contains a user's Yellowfin username, entered by LDAP users at login.	
LDAP First Name Attribute The LDAP attribute that contains a user's first name.		
LDAP Surname Attribute	The LDAP attribute that contains a user's surname.	
LDAP Email Attribute	The LDAP attribute that contains a user's email address.	
LDAP Role Attribute	The LDAP attribute that contains a user's Yellowfin role.	
LDAP Group Filtering Criteria	Criteria used to filter a list of LDAP groups. Only groups returned in the filtered list will be passed to Yellowfin.	
Ordering	The order in which internal authentication is performed.	
Test Connection	Test your LDAP connection with the settings defined above.	

See LDAP Authentication for more information.

Description

Option

Client Organisation Functionality			
		Enable creation of multiple virtual instances within the system.	
Global Annotations		Allow annotations created at the Primary Org to be viewed through any Client Orgs.	
Option Descript		ion	
Password Length Restrictions	· · · · · · · · · · · · · · · · · · ·		
Requirements • At lea • Passw Password Attempts Limit Define the Display the		y special password requirements for user passwords. These can include requiring: ust one number ust one letter ust one upper case letter ust one lower case letter ust one special character word must be different from last	
		maximum number of password attempts a user may have before the account is locked	
		e Forgot Password Link on the login page so users can request a password reset. This is to be enabled in the Email Settings tab.	option requires Email

Login Autocomplete	Allow browsers to cache passwords on the login screen. This option has been removed.
	See http://www.yellowfinbi.com/YFForum-Login-autocomplete-configuration-option-removed-? thread=178871 for more information.
Remember Me	Display the Remember Me option on the login page so users can set Yellowfin to remember their credentials for a set period of time.
Remember Me Period	Define the number of hours Yellowfin will remember a user's credentials.

Integration

top You can configure integration settings that allow you to customise panels in Yellowfin, including Headers, Footers, and Toolbars.



Option	Description	
Display	Define whether a standard, custom, or no header is used throughout the system.	
URL	Specify the location of the custom header file.	
Page Title	Display the page title in the header area of the page.	
User	Display the name of the current user in the header area of the page.	
Client	Display the name of the current client org in the header area of the page.	
Role	Display the name of the current user's role in the header area of the page.	
Option	Description	
Display	Display the main navigation bar directly under the header area of the page.	
Logout Lir	Display a Logout link in the main navigation bar directly under the header area.	
Offset	Define the number of pixels the main navigation bar options are pushed out from the left hand side of the page.	
Option	Description	
Display	Define whether a standard, custom, or no footer is used throughout the system.	
URL	Specify the location of the custom footer file.	
Option	Description	
Display	Define whether a custom or no left navigation is used throughout the system.	
URL	Specify the location of the custom navigation file.	
Option	on Description	
Display	Define whether a standard or custom session timeout page is used.	