Configuration

Overview

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 that sets up your SMPT server.

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. See here for a list of all events.
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 Stream Updates - Signal Updates - Story Updates
Broadcast Display Name	Define the sender display name for Broadcast emails.
Broadcast Email Address	Define the sender email address for Broadcast emails.

Display Broadcast Filter Values	Display the filter values applied to the report in the body of the broadcast email.
Recipient Search	Allow users to search for recipients in the user list when sending an email.
Broadcast Failure Task	A task will be created any time a broadcast fails to be sent.
Broadcast Failure Task Recipient	Select a group to receive broadcast failure tasks.
Send email in Background	Allow users to continue working in the system while an email is sent.
Include link in Broadcast	Include a link to the content in all broadcast types.

Option	Description
SMTP Server	Define the hostname 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
Email Size Limit	Define the maximum email content size (in megabytes) permitted to be broadcast.
Encryption	Define how to use encryption when connecting to the outgoing mail server. Options include: • **None:** this option does not use encryption when connecting to the outgoing mail server. Connections use the SMTP protocol which has a default port of 25. • **SSL:** this option uses SSL encryption when connecting to the outgoing mail server. The server must support SSL connections on the port specified above. Connections use the SMTPS protocol (SMTP over SSL) which has a default port of 465. • **STARTTLS:** this option uses the STARTTLS command to enable SSL encryption after connecting to the outgoing mail server. Connections use the SMTP protocol with SSL or TLS encryption, and have a default port of 587.
Allow Invalid Certificate	Allow connections to the outgoing mail server even if the SSL certificate is not valid. **Warning:** Only use this option if you trust the server.
Test Email Address	Define an email address to send a test email to.

Option	Description
Save to Disk Path	The server path where Save To Disk report broadcasts will be saved. This can also be a UNC path if the user's environment permits.

System

You can configure general system settings here, including view & pdf defaults, logo options, and server settings.

Option	Description
Navigation Style	Select a navigation style to use within the system. The following are available: • Left Side Navigation: the system navigation items will appear in a panel that can be expanded or collapsed on the left hand side of the page. • Toolbar Navigation: the system navigation items will appear as links in the main navigation bar across the top of the page.
Content Creation Location	Select the location of the **Create** content button. This is only available when using Left Side Navigation (see Navigation Style option above). • Left Side Navigation: the Content Creation options will appear in the Left Side Navigation panel. • Top Right: the Content Creation button will be attached to the main navigation bar on the right hand side of the page.
Color Picker Standard Colors	Define the default colors to display in the color picker, along with the chart color defaults. There is room for six colors 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. If an external URL is not set for a client org, it will revert to the primary org setting. 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)
Minimum Broadcast Interval	Select the minimum interval that can be set for running broadcasts.
Maximum File Upload Size	Set the maximum size (in MB) allowed for any file uploaded to Yellowfin, such as GeoPacks, content imports, and images. The default is 80. The field accepts numbers and a decimal separator (eg, 80.5) only.
Unique Tokens for Every Request	This is a new feature from 8.0.9. When enabled, a nonce is added to every request sent to Yellowfin, which is then validated by the server before the request can be processed. This will help prevent request replay attacks, or automated request submissions. When disabled, no nonce is added and requests will be processed without a unique token. Depending on your system security setup, this could result in processing duplicate submissions. See our hardening guide for more information.

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. For example: 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 View Builder.
View Data Preview	Define the default number of rows of data to be displayed in the View Builder.
Database Column Order	Display the columns within a database table in *alphabetical* or *native* order when viewed in the View Builder.
Grouped Values Threshold	Define the number of unique values in a field required before the Grouped Values option is suggested. This is used in the Data Profiling section of the View Builder.
Report View List Sort	Define whether to sort the list of available views on the Report Initialisation page by their *name* or *recent use*.
Drill Anywhere Default	Define whether or not Drill Anywhere is enabled by default on new fields when they are added to views.
Default Metric Aggregation	Select the default aggregation to be applied whenever a metric field is added to a view.
Add New View Fields	Define whether or not table fields selected on the Model page in the view builder will automatically be added as view fields.
Default Data Preview	Choose a default selection for the data previewed on the Prepare page in the view builder.
Data Profiling	Define whether or not data profiling is enabled in the view builder.

Option	Description
Export to CSV	Allow users to export report results to CSV by default.
Export to DOCX	Allow users to export report results to DOCX by default.
Export to PDF	Allow users to export report results to PDF by default.
Export to XLSX	Allow users to export report results to XLSX by default.

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.
Force Regular Page Breaks	This setting is useful when your export contains charts and tables. Forcing regular page breaks reduces the risk of charts and tables overlapping during export by allowing page breaks to split images over two pages. If this setting is off and your PDF export has overlapping charts and tables, try switching it on and retesting your PDF export.
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
Conditional Formatting Icon Export	If your report uses conditional formatting to display icons instead of data, enabling this option will ensure that those icons are exported. Disabling this option will ignore any conditional formatting and instead use the original data values.

Option	Description
Conditional Formatting Icon Export	If your report uses conditional formatting to display icons instead of data, enabling this option will ensure that those icons are exported. Disabling this option will ignore any conditional formatting and instead use the original data values.
Keep Formatting	If your report contains formatting for numeric values, such as prefixes, suffixes and thousand separators, enabling this option will export numeric values as text to maintain formatting. Disabling this option will ignore any formatting and export numeric values as numeric. This feature is enabled by default.

Option	Description

Line Delimiter	This setting might be useful when working with third-party tools which may require a specific carriage return type to correctly process CSV files. Set your default carriage return here. Select from CR, CRLF and LF. This setting can be overridden during manual/ad-hoc CSV exports.

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. Add the parameter *key* and *value* to define one.

> See *Custom Parameters* for more information.

Option	Description
JavaScript Charts	Enabling this button allows permitted users to create JavaScript charts.
Client Org JavaScript Charts	Switch this button on to allow your users (with appropriate role permissions) to access the JavaScript functionality, if you have a multi-client organization.

Option	Description
Time Delay for Report Thumbnail Clean-up	This system task runs in the background and is invoked every week. It checks for reports that have been deleted recently (using the number set in this field as a minimum number of days since deletion) and deletes the thumbnail images linked to them.

Region

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.
Middle Initial	Specify if the middle initial should be used in names by default.
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 Language Font	Specify the default language font to be used in the system if special language characters are required.
User Defined Language Font	Specify if users should be able to specify their preferred language font, rather using the system defined Default Language Font for PDF export settings.
CSV Character Set	Specify the default character set to be used when exporting reports to CSV format.

Option	Description
Locale-based Sorting	Enable this toggle to sort report data based on server locale. This ensures diacritics (such as é and ö) are sorted alphabetically, but may increase sort processing time.
Multi-language Deployment	Enable Content Translation to allow advanced users to provide alternate text to be displayed for additional languages.
Languages	Specify the languages users may translate content to.
Copy Content Translation	Enable this toggle to copy translated content when making a copy of a report with it. If disabled, the copied report only contains the original content.

Authentication

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

Option	Description
Logon 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.
Allow Content Super User	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 organization. After activating this setting, you must then assign user roles that include this function. 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.

Option	Description
User Authentication	Define whether system or LDAP authentication will be used during the login process.
JWT Single Sign On	Enable user authentication via JWT Tokens. Toggling this option on produces a variety of options. See the wiki page Using JWT tokens with SSO for more information.

The LDAP directory needs to be configured, if this is the selected user authentication method.

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.
Map LDAP Group to a Yellowfin Role	When enabled, LDAP user's roles are updated directly in Yellowfin based on their LDAP group.
Test Connection	Test your LDAP connection with the settings defined above.

> See *Configuration* for more information.

Option	Description
Client Organization 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	Description
Password Length Restrictions	Define the minimum and maximum character length for user passwords.
Password Requirements	Enable any special password requirements for user passwords. These can include requiring: • At least one number • At least one letter • At least one uppercase letter • At least one lowercase letter • At least one special character • Password must be different from last
Password Attempts Limit	Define the maximum number of password attempts a user may have before the account is locked.
Show Forgot Password Link	Display the Forgot Password Link on the login page so users can request a password reset. This option requires Email Notifications to be enabled in the Email Settings tab.
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	If 'Remember Me' is enabled, this defines the number of hours Yellowfin will remember a user's credentials.
Password Expiry Policy	When enabled, set an expiry duration for user passwords, and each user will receive an email requesting they update their password 10 days before it expires. If a user does not log in before their password expires, they will be prompted to reset their password at next login before they gain access to the system. Note: this option is not available for LDAP users as their password management is handled by LDAP.
Password Expiry Age	The number of days that a user's password is valid. This value can be set to any number of days and begins counting down from the day after a user's current password is set.

Integration

You can configure integration settings that allow you to customize 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 Link	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 standard or custom session timeout page is used.
URL	Specify the location of the custom timeout page.