Configuration

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

Overview

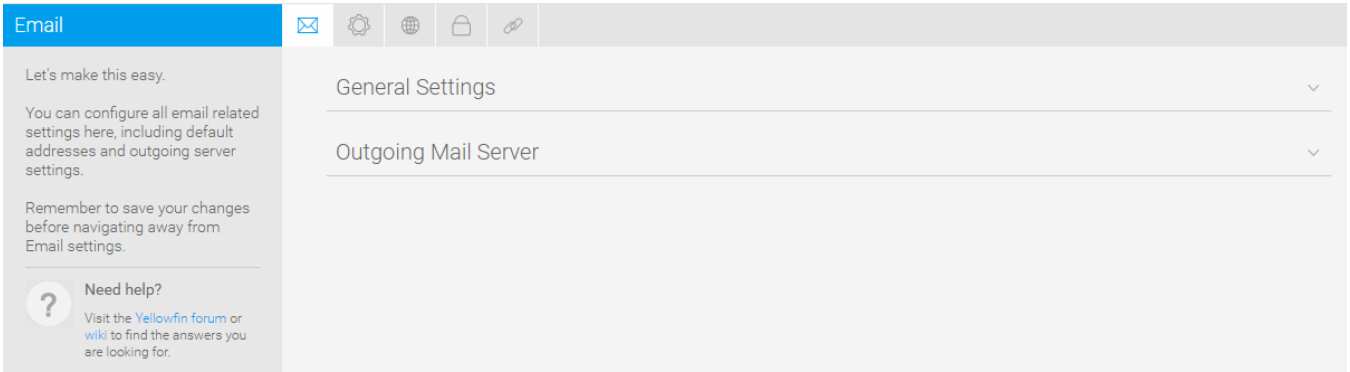
top
This page allows administrators to configure a wide range of settings that fall under the following tabs:



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

Email

top
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.
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.

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
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

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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.
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)
Minimum Broadcast Interval	Select the minimum interval that can be set for running broadcasts.

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.

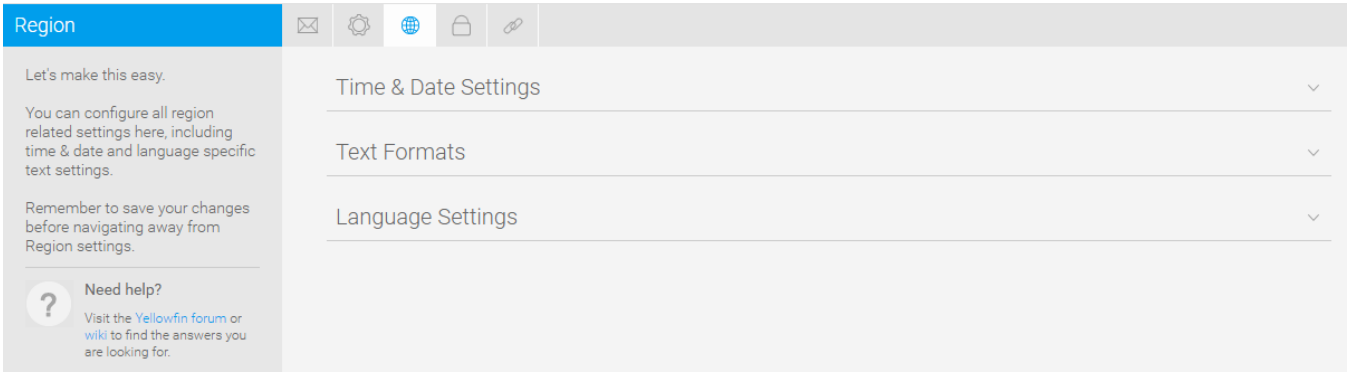
Option	Description
Filter Views by Category	Display the View list in Administration grouped by Source and View Category.
Table List Length	Define the number of tables displayed at once in the Database Tables list on Step 1 of the Drag & Drop View Builder.
Database Column Order	Display the columns within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

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



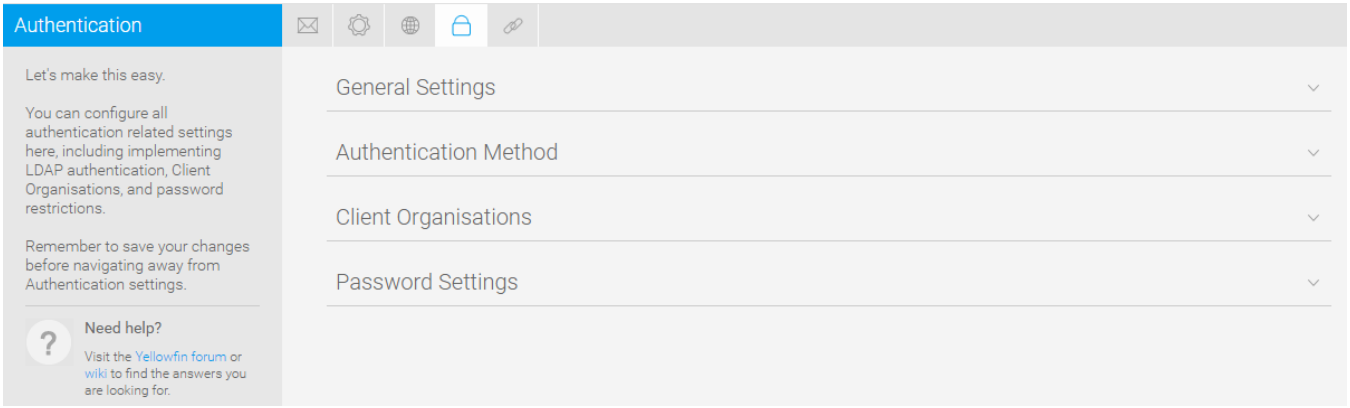
Option	Description
Default User Time Zone	Specify the default Time Zone to be initially assigned to users until they customise the setting.
Date Format	Specify the default date format to be used throughout the system.
Week Start Day	Specify the first day of the week, to be used for predefined date filters.
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
Multi-language Deployment	Enable Content Translation so advanced users to provide alternate text to be displayed for additional languages.
Languages	Specify the languages users may translate content to.

Authentication

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You can configure all authentication related settings here, including implementing LDAP authentication, Client Organisations, 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.

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.*

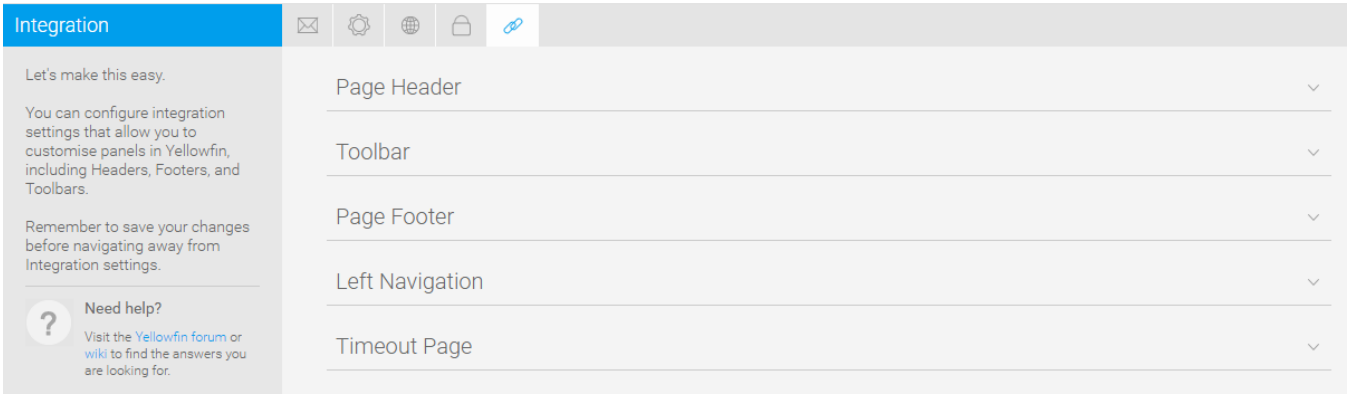
Option	Description
Client Organisation Functionality	Enable creation of multiple virtual instances within the system.

Global Annotations	Allow annotations created at the Primary Org to be viewed through any Client Orgs.

Option	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 upper case letter • At least one lower case 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.
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

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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 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 custom or no left navigation is used throughout the system.
URL	Specify the location of the custom navigation file.

Option	Description
Display	Define whether a standard or custom session timeout page is used.
URL	Specify the location of the custom timeout page.

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