Available Security Functions

Overview

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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.

Function	Description
General	
Report Access CRUD	Allow users to log in to Yellowfin and view, edit, create, and delete reports
User Profile	Allow users to update their user profile
Draft Content List	Shows a list of draft content on the Dashboard and Browse pages.
Favourites	Allow users to add reports to their favourites list
Export Reports to CSV	Allow users to export report results to CSV
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.
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 Maximise Report	Hide the maximise option on dashboard reports
Hide Dashboard Report Menu	Hide the drop-down menu on reports on the dashboard
Refresh Dashboard Reports	Allow 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	Shows Dashboards being edited by other users.
Browse	
Hide Browse Page	Hide the report browse page
Hide Advanced Report Search	Hide the advanced search on the report list page
Hide Columns Option (Browse Page)	Hide the columns option on the report list page. Users will not be able to change the columns displayed
Hide Report Details (Browse Page)	Hide the report details on the report list page
Approval Administration	Allow users to see outstanding report approvals
Draft Public Reports	Allow users to see draft versions of public reports created by other users
Report Builder	
Report Types	Allow users to create freehand SQL reports, and Jasper reports

Public Reports CRUD	Allow 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	Allow users to create sub query reports
Ad Hoc Reports	Allows users to create Ad Hoc reports
Access Filter	Allow users to set or change the access filter on reports
Related Reports	Allow users to set up co-display, drill down and drill through functionality
CSV Reports	Allow users to write reports based on CSV files
Advanced CSV Functionality	Allow users to perform advanced operations on CSV reports such as selecting the data source
Custom Query Filters	Allow 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	Disable 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.
JavaScript Charts	Allows users to switch on the JavaScript chart creation functionality in the report builder. (Learn more about this here.)
Report Menu	
Broadcast Reports	Allow 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	Allow users to send an adhoc email copy of a report
Hide Open Report	Hide the open report menu item
Hide Report Details (Report Menu)	Hide the report details item on the report menu
Hide SQL	Hide report SQL from users.
Multicast Reports	Allow 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	Hide 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	
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	Allow 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	Allow users to see and be assigned tasks.
Personal Tasks	Allow users to create and assign tasks to themselves.
Public Tasks	Allow users to create and assign tasks to themselves and others.
System Task Admin	Allow users to approve or reject the completion of system tasks.
Configuration	
Configuration	Allow users to modify Yellowfin site parameters
Configure Logon ID	Allow users to specify how users are authenticated
Configure Page Format	Allow users to configure the page layout (integration settings, etc)
Configure Support Email	Allow users to set the support email address
Administration	
Import	Allow users to import content from XML files
Export	Allow users to export content to XML files for backup or transfer to another system
Folder Access	Allow users to configure report categories
System Information	Allow admin users to view system information
Licence Management	Allow users to view Yellowfin licence details and upload new licence files
Create and Edit Tags	Allow users to create and edit tags used in discussions
Client Organisation Management	Allow users to set up and manage client organisations.
Filter Period Management	Allow 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 Conncetions, JDBC Drivers, and Advanced Functions.
Data Sources & Views	
Data Sources CRUD	Allow users to create, edit, and delete data source connections
OLAP	Allow users to connect to OLAP data sources
Data Source Admin CRUD	Allow users to create, edit, and delete all data sources regardless of security restrictions
Source Filters	Allow users to create data source filters
Database Views CRUD	Allow users to create, edit, and delete Yellowfin views
Freehand SQL Views	Allow users to create Freehand SQL views.
Show Draft Views	Allow users to see views being edited by other users
Stored Procedures	Allow 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	Allow users to create CSV tables within a view
Composite Views	Allows users to create Composite Views.
Skip Schema Check	Bypass schema check when using CheckSchemaForUser functionality.
Report as a Datasource	Allows reports to be written aginst the results of another report
User Administration	
User Management CRUD	Allow users to create, edit, and delete user accounts
Group Management CRUD	Allow users to create, edit, and delete user groups
Roles Management	Allow 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.
Other	
Subscribe to Broadcast	Allows users to subscribe to report broadcasts.

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