

# Configuration

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## Overview

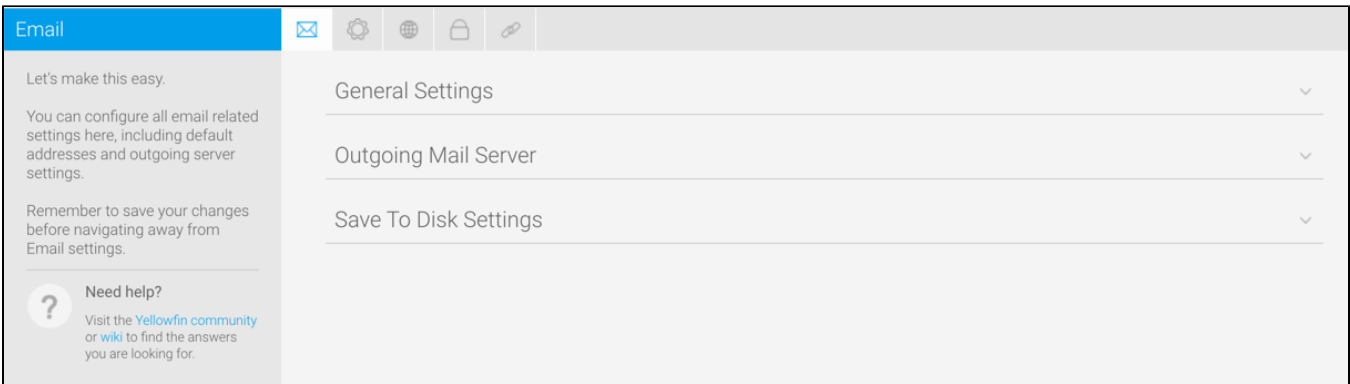
This page allows administrators to configure a wide range of settings that fall under the following tabs:



1. [Configuration - Email](#)
2. [Configuration - System](#)
3. [Configuration - Region](#)
4. [Configuration - Authentication](#)
5. [Configuration - Integration](#)

## Email

You can configure all email related settings here, including default addresses and outgoing server settings that set up your SMTP 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 <a href="#">here</a> 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: <ul style="list-style-type: none"><li>• User Account &amp; Password Updates</li><li>• Content Distribution</li><li>• Comment Updates</li><li>• Timeline Updates</li><li>• Discussion Stream Updates</li><li>• Signal Updates</li><li>• Story Updates</li></ul>

<b>Broadcast Display Name</b>	Define the sender display name for Broadcast emails.
<b>Broadcast Email Address</b>	Define the sender email address for Broadcast emails.
<b>Display Broadcast Filter Values</b>	Display the filter values applied to the report in the body of the broadcast email.
<b>Recipient Search</b>	Allow users to search for recipients in the user list when sending an email.
<b>Broadcast Failure Task</b>	A task will be created any time a broadcast fails to be sent.
<b>Broadcast Failure Task Recipient</b>	Select a group to receive broadcast failure tasks.
<b>Custom Share Email Sender</b>	Allows Yellowfin content to be shared through a customized email account, if enabled, rather than through the logged in user's account. Use the following two configurations to define the custom account.
<b>Share Email Display Name</b>	Define the sender's display name for shared emails.
<b>Share Email Address</b>	Define the sender's email address for shared emails.
<b>Send email in Background</b>	Allow users to continue working in the system while an email is sent.
<b>Include link in Broadcast</b>	Include a link to the content in all broadcast types.
Option	Description
<b>SMTP Server</b>	Define the hostname or IP address of the outgoing mail server to be used to send emails.
<b>SMTP Port</b>	Define the port to connect to the outgoing mail server on. Leave this blank to use the default SMTP port.
<b>SMTP Authentication</b>	<p>Enable this option if your SMTP server requires authentication. You will then need to complete the following:</p> <ul style="list-style-type: none"> <li>• User Name</li> <li>• Password</li> <li>• Confirm Password</li> </ul>
<b>Email Size Limit</b>	Define the maximum email content size (in megabytes) permitted to be broadcast.
<b>Encryption</b>	<p>Define how to use encryption when connecting to the outgoing mail server. Options include:</p> <ul style="list-style-type: none"> <li>• <b>None</b>: 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.</li> <li>• <b>SSL</b>: 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.</li> <li>• <b>STARTTLS</b>: 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.</li> </ul>
<b>Allow Invalid Certificate</b>	Allow connections to the outgoing mail server even if the SSL certificate is not valid. <b>Warning:</b> Only use this option if you trust the server.
<b>Test Email Address</b>	Define an email address to send a test email to.
Option	Description
<b>Save to Disk Path</b>	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.

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## System

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

System

Let's make this easy.

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

Remember to save your changes before navigating away from System settings.

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Need help?

Visit the [Yellowfin community](#) or [wiki](#) to find the answers you are looking for.

General Settings

Company Logo

Views

Report Export Defaults

PDF Export Defaults

DOCX Export Defaults

CSV Export Defaults

Custom Parameters

Security

Housekeeping

Option	Description
Navigation Style	Select a navigation style to use within the system. The following are available: <ul style="list-style-type: none"><li>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.</li><li>Toolbar Navigation: the system navigation items will appear as links in the main navigation bar across the top of the page.</li></ul>
Content Creation Location	Select the location of the <b>Create</b> content button. This is only available when using Left Side Navigation (see Navigation Style option above). <ul style="list-style-type: none"><li>Left Side Navigation: the Content Creation options will appear in the Left Side Navigation panel.</li><li>Top Right: the Content Creation button will be attached to the main navigation bar on the right hand side of the page.</li></ul>
Enable Guided NLQ	This toggle allows Guided NLQ to be switched off for all users of a Yellowfin instance. For multi-org setups, this toggle can be set individually per client org.
Color Picker Standard Colours	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	<ul style="list-style-type: none"><li>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.</li><li>Excluded: Base tags will be excluded from the HTML of every page.</li><li>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.</li></ul>
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.

<b>JavaScript API Object Name</b>	<p>This field is useful for white label instances of Yellowfin. By default, embed links and JS API window object name use the text <b>yellowfin</b> which is visible to end users.</p> <p>If you enter text in this field (eg, <b>myCompanyName</b>), the JS API window object name will use your text instead of the default <b>yellowfin</b> (eg, in the JS API window object name, <b>window.yellowfin</b> would become <b>window.myCompanyName</b>).</p> <p>If this field is left blank, the default text <b>yellowfin</b> will continue to be displayed in the JS API window object name and embed links.</p>
<b>External API cookie timeout</b>	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.
<b>Allowed Origins</b>	This option allows users to specify a series of domains permitted for Cross Origin Resource Sharing (CORS), while the External JavaScript API is being used. This option is only available in the primary organization; it is not available in client orgs.
<b>Outgoing Proxy Server</b>	Define this if the Yellowfin server should connect to the internet via a proxy server. For example, when connecting to WMS servers.
<b>Extended Logging</b>	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.
<b>Restricted Roles</b>	Specify which roles can be hidden from specified Administrator roles.
<b>Terms &amp; Conditions</b>	Provide business Terms & Conditions that a user must agree to before logging in to the system for the first time. (Optional)
<b>Administration Tour</b>	Select the storyboard to be used for guiding users through the Administration area. (Optional)
<b>Minimum Schedule Interval</b>	Select the minimum interval that can be set for running all types of schedules including; Broadcasts, Cached Reports, Cached Filters, Data Transformations and Signals.
<b>Multi-Tab Support</b>	Enable this to allow Yellowfin to be used across multiple tabs and browsers during a single user session.
<b>Maximum File Upload Size</b>	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.
<b>Unique Tokens for Every Request</b>	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 <a href="#">hardening guide</a> for more information.

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

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

<b>Grouped Values Threshold</b>	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.
<b>Report View List Sort</b>	Define whether to sort the list of available views on the Report Initialisation page by their <i>name</i> or <i>recent use</i> .
<b>Drill Anywhere Default</b>	Define whether or not Drill Anywhere is enabled by default on new fields when they are added to views.
<b>Default Metric Aggregation</b>	Select the default aggregation to be applied whenever a metric field is added to a view.
<b>Add New View Fields</b>	Define whether or not table fields selected on the Model page in the view builder will automatically be added as view fields.
<b>Default Data Preview</b>	Choose a default selection for the data previewed on the Prepare page in the view builder.
<b>Data Profiling</b>	Define whether or not data profiling is enabled in the view builder.

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

Option	Description
<b>Page Size</b>	Select the page size for your PDF file. This allows other layout settings to be configured properly.
<b>Page Orientation</b>	Choose the orientation of your file.
<b>Shrink to Fit Page Width</b>	If enabled, the report content will be shrunk to fit the page width.
<b>Use Default Layout Values</b>	This toggle lets you alter the default system layout settings for this exported PDF. It does not update the system defaults. If disabled, the options below will appear.
<b>Header Height</b>	If your report contains a header, enter the header's height (pixels) in this box to avoid any overlap between your header and the top of the report.
<b>Footer Height</b>	If your report contains a footer, enter the footer's height (pixels) in this box to avoid any overlap between the report contents and your footer.
<b>Scale Images</b>	If enabled, images will be scaled to prevent them from being cut off if too large.
<b>Maximum Image Width</b>	Enter the maximum image width (pixels).
<b>Maximum Image Height</b>	Enter the maximum image height (pixels).
<b>Report Section Page Break</b>	If enabled, this option creates page breaks for report sections. This ensures that each new section in a report will start at the top of a new page.  Note that Yellowfin splits the report table when report sections are defined, creating a separate table for each report section.
<b>Co-Display Report Page Break</b>	If enabled, this option creates page breaks for co-display reports. This ensures that each co-display report will start from the top of a new page in the exported PDF.
<b>PDF Password</b>	Enter a password to secure exported PDF files.
<b>Lock Page During Exports</b>	If enabled, user interactions and navigation will be restricted, preventing unexpected changes when the PDF export is taking place.



If you can't see the PDF export defaults in this location, they will be visible on the [Admin Console](#).

Option	Description
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<b>Conditional Formatting Icon Export</b>	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.
<b>Option</b>	<b>Description</b>
<b>Conditional Formatting Icon Export</b>	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.
<b>Keep Formatting</b>	<p>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.</p> <p>This feature is enabled by default.</p>
<b>Option</b>	<b>Description</b>
<b>Line Delimiter</b>	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.
<b>Option</b>	<b>Description</b>
<b>Custom Parameters</b>	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 <i>key</i> and <i>value</i> to define one.

See [Custom Parameters](#) for more information.

<b>Option</b>	<b>Description</b>
<b>JavaScript Charts</b>	Enabling this button allows permitted users to create JavaScript charts.
<b>Client Org JavaScript Charts</b>	Switch this button on to allow your users (with appropriate role permissions) to access the JavaScript functionality, if you have a multi-client organization.
<b>Dashboard Code Mode</b>	Switch on toggle to enable Code Mode in dashboards and Present for the current instance. This allows Code Mode content to be consumed, and also enables permitted users to edit dashboard code and add custom HTML, CSS, and JavaScript (provided they have the correct role function).
<b>Client Org Dashboard Code Mode</b>	Switch on toggle to provide client org admins control to enable or disable Code Mode in dashboards and Present at the client org level. If this gets turned off, the Code Mode settings for all client orgs will become disabled; this also prevents any custom Code Mode content created in client orgs from running.
<b>Option</b>	<b>Description</b>
<b>Time Delay for Report Thumbnail Clean-up</b>	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.

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## Region

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

Region

Let's make this easy.

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

Remember to save your changes before navigating away from Region settings.

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Need help?  
Visit the [Yellowfin forum](#) or [wiki](#) to find the answers you are looking for.

Time & Date Settings

Text Formats

Language 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.
Decimal Separator Per Language	Toggle to activate an alternative decimal separator for each non-default user language set. Users will see this decimal separator in their language on any reports and charts they view, overriding the system-wide default for them.
Thousand Separator Per Language	Toggle to activate an alternative thousand separator for each non-default user language set. Users will see this thousand separator in their language on any reports and charts they view, overriding the system-wide default for them.

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 alternative 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 contains only the original content.

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## Authentication

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

Authentication

Let's make this easy.

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

Remember to save your changes before navigating away from Authentication settings.

Need help?

Visit the [Yellowfin community](#) or [wiki](#) to find the answers you are looking for.

General Settings

Authentication Method

Client Organizations

Password Settings

Option	Description
<b>Logon ID</b>	Specify whether users log in to the system with an email address or username.
<b>Allow External Access</b>	Direct links to unsecured content can be shared with anyone.
<b>Multiple Login Logic</b>	Define what happens when a user tries to log in at one location, when they're already logged in somewhere else.
<b>Allow Content Super User</b>	<p>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.</p> <p>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.</p>

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

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

Option	Description
<b>LDAP Host</b>	The Hostname or IP address of the LDAP server.
<b>LDAP Port</b>	The TCP port that the LDAP service is listening on.
<b>Encryption</b>	The encryption method implemented by the LDAP server.
<b>LDAP Base DN</b>	The LDAP node that all users and groups are contained within.
<b>LDAP Group</b>	Only members of this group will be able to login to Yellowfin.
<b>LDAP Bind User</b>	An LDAP user with rights to search the LDAP directory.
<b>LDAP Bind Password</b>	The password for the LDAP Bind User defined above.
<b>LDAP Search Attribute</b>	The LDAP attribute that contains a user's Yellowfin username, entered by LDAP users at login.
<b>LDAP First Name Attribute</b>	The LDAP attribute that contains a user's first name.
<b>LDAP Surname Attribute</b>	The LDAP attribute that contains a user's surname.
<b>LDAP Email Attribute</b>	The LDAP attribute that contains a user's email address.
<b>LDAP Role Attribute</b>	The LDAP attribute that contains a user's Yellowfin role.



<b>LDAP Group Filtering Criteria</b>	Criteria used to filter a list of LDAP groups. Only groups returned in the filtered list will be passed to Yellowfin.
<b>Ordering</b>	The order in which internal authentication is performed.
<b>Map LDAP Group to a Yellowfin Role</b>	When enabled, LDAP user's roles are updated directly in Yellowfin based on their LDAP group.
<b>Test Connection</b>	Test your LDAP connection with the settings defined above.

See [Configuration](#) for more information.

Option	Description
<b>Client Organization Functionality</b>	Enable creation of multiple virtual instances within the system.
<b>Global Annotations</b>	Allow annotations created at the Primary Org to be viewed through any Client Orgs.
Option	Description
<b>Password Length Restrictions</b>	Define the minimum and maximum character length for user passwords.
<b>Password Requirements</b>	<p>Enable any special password requirements for user passwords. These can include requiring:</p> <ul style="list-style-type: none"> <li>• At least one number</li> <li>• At least one letter</li> <li>• At least one upper case letter</li> <li>• At least one lower case letter</li> <li>• At least one special character</li> <li>• Password must be different from last</li> </ul>
<b>Password Attempts Limit</b>	Define the maximum number of password attempts a user may have before the account is locked.
<b>Show Forgot Password Link</b>	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.
<b>Remember Me</b>	Display the Remember Me option on the login page so users can set Yellowfin to remember their credentials for a set period of time.
<b>Remember Me Period</b>	Only displayed if 'Remember Me' is enabled. This defines the number of hours Yellowfin will remember a user's credentials.
<b>Password Expiry Policy</b>	<p>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.</p> <p><b>Note:</b> this option is not available for LDAP users as their password management is handled by LDAP.</p>
<b>Password Expiry Age</b>	Only displayed if 'Password Expiry Policy' is enabled. This sets 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.

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## Integration

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

Integration

Let's make this easy.

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

Remember to save your changes before navigating away from Integration settings.

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Need help?  
Visit the [Yellowfin community](#) or [wiki](#) to find the answers you are looking for.

Page Header

▼

Toolbar

▼

Page Footer

▼

Timeout Page

▼

Option	Description
Display	Define whether a standard, custom, or no header is used throughout the system.
URL	This option only displays if 'Display' is set to 'Custom'. 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	This option only displays if 'Display' is set to 'Custom'. Specify the location of the custom footer file.

Option	Description
Display	Define whether a standard or custom session timeout page is used.
URL	This option only displays if 'Display' is set to 'Custom'. Specify the location of the custom timeout page.

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