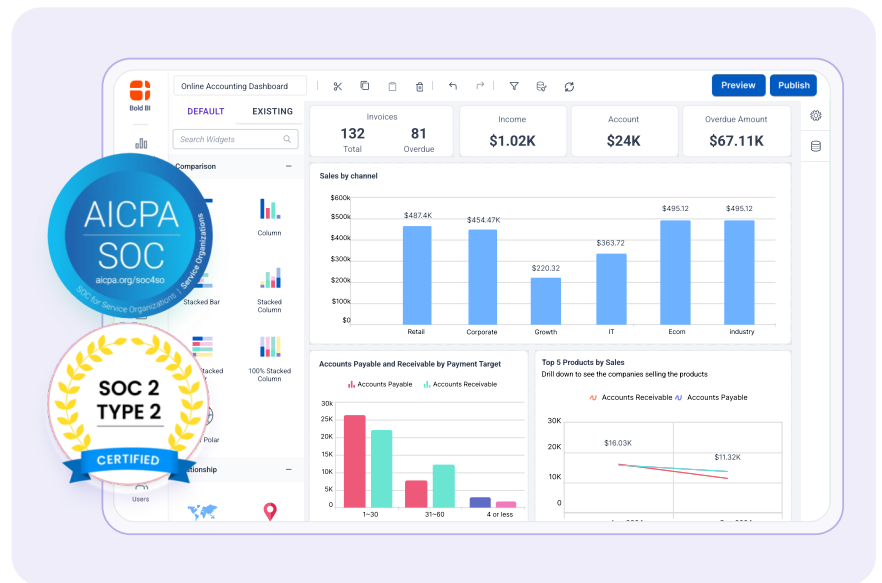


Bold BI Enterprise Security

Security features provided by
Bold BI.

We are committed to the highest levels of
trust, transparency, standards
conformance, and regulatory compliance.



We know that security is foremost on your mind when choosing any product that
works with your data.

Bold BI not only makes it easier for all employees and stakeholders to access
dashboards, it gives them a single, secure point of entry.

2



SOC 2[®] Type 2

Our SOC 2[®] Type 2 certification verifies that Bold BI has successfully completed a thorough audit, ensuring that our security policies and controls consistently meet the highest industry standards when it comes to keeping data safe and secret.

"Our customers are amazed at how we get them to their data so quick."

- Jon Ellis, product manager

Authorization

- Authorization controls which Bold BI resources, such as dashboards, data sources, schedules, and AI-powered insights, may be accessed by users after authentication has been verified.
- You control any actions that can be performed on these resources.
- Row-Level Security (RLS) policies are enforced across AI-powered experiences, ensuring users can access only the data they are authorized to view when using AI Agent and AI Assistant capabilities
- Supports group-based permissions and access controls across embedded analytics environments.



Data Security

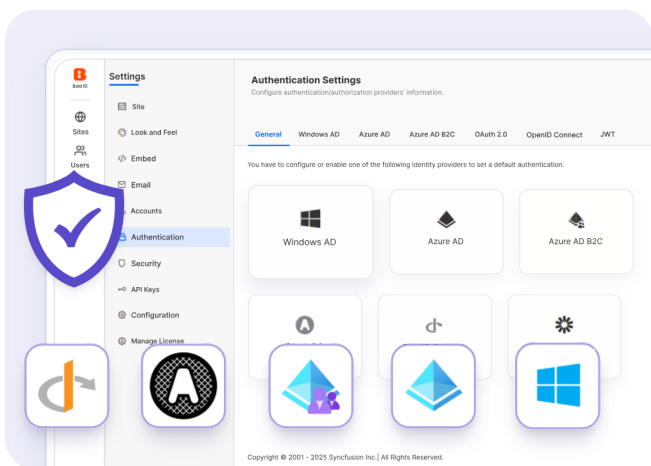
- Bold BI data supports encryption at rest and during transit. Integrate seamlessly with the rest of your data security architecture. We are SOC 2® Type 2 compliant.
- Sensitive credentials, including AI provider API keys, are protected through masking controls that prevent accidental exposure.
- Bring Your Own Key (BYOK) support allows organizations to use and manage their own AI provider credentials for greater control over security and governance.
- AI capabilities can be deployed using customer-managed credentials, helping organizations maintain control of their AI infrastructure and data access.



Secure by Design

- Every change and new feature is governed by a change management policy.
- Screening of code is performed with standard code analyzer tools, vulnerability scanners, and a manual review process.





Authentication

- Bold BI can be configured with Azure Active Directory, Windows Active Directory, Keycloak, and other enterprise identity providers. OAuth 2.0 and OpenID Connect identity providers are supported.
- Supports enterprise Single Sign-On (SSO) integrations, including Keycloak, OAuth 2.0, OpenID Connect, and JWT-based authentication
- Encrypted JWT token support helps strengthen authentication security and protect identity information during application access.
- Automatically maps users to groups using OAuth and OpenID claims to simplify identity and access management.

Infrastructure Security

- Bold BI can be hosted within your secure environment with absolutely no access from any outside agency, including Syncfusion.
- Supports IP whitelisting with subnet-based access controls, enabling organizations to restrict access to approved network ranges.
- Configuration backup capabilities help strengthen disaster recovery and operational resilience.



Malware and Spam Protection

- We use commercial anti-malware that is designed to run in the background without human intervention.
- Our build systems run anti-malware software to prevent infection of binaries.



Payment Security

- We use Stripe as a commercial payment gateway for processing payments.
- We do not store any payment information on our system.

Open-Source Component Usage

- Bold BI uses several open-source frameworks. These are listed in our license agreement.
- Our legal team verifies and approves the use of any such component in Bold BI.



Compliance

- **Audit & Governance:** Comprehensive audit logging captures user login activity, IP address information, user and group membership changes, and administrative actions to support governance, monitoring, and compliance requirements.
- Version control capabilities help organizations track dashboard and data source changes while maintaining appropriate access restrictions

Connect with us



To learn more, visit www.boldbi.com.

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