Report Approval

- Overview
- Setting up approval rules
- Triggering approval
- Approving content

Overview

Yellowfin has the ability to workflow public reports. Approval workflows allow experts to validate reports created by many users to author reports before they are published to a wider group of users.

Approval workflow is only applied to public reports. If you save a private report it will not be routed to an approver.

top

Setting up approval rules

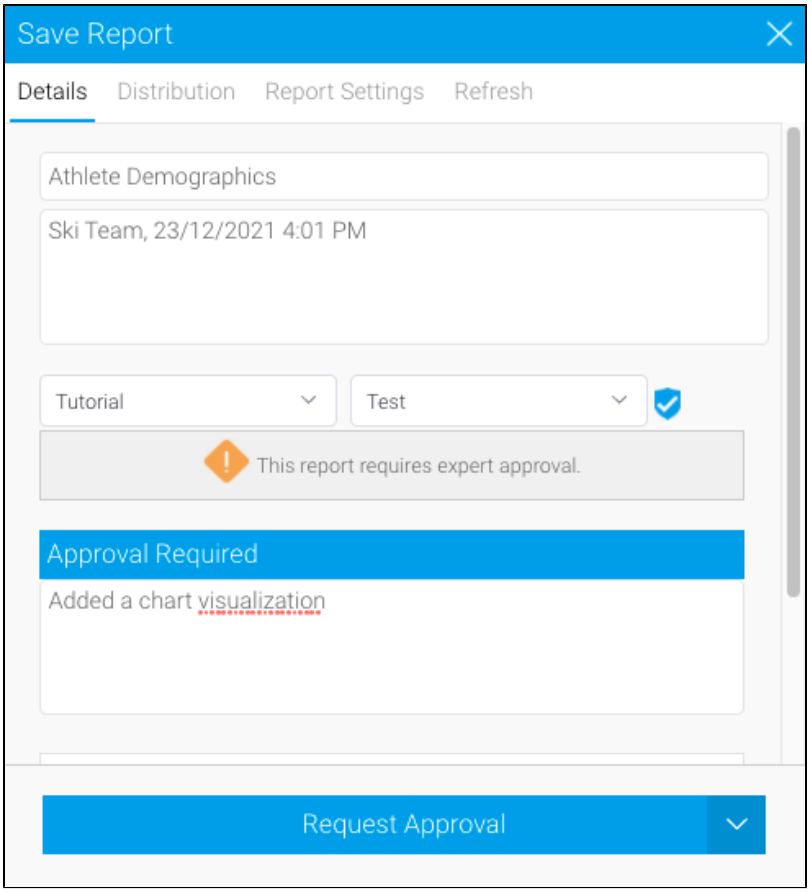
For the report approval workflow to take effect you must first create a sub folder to store reports. Once a sub folder is created, you can define the approval experts for that sub folder in the Admin Console.

top

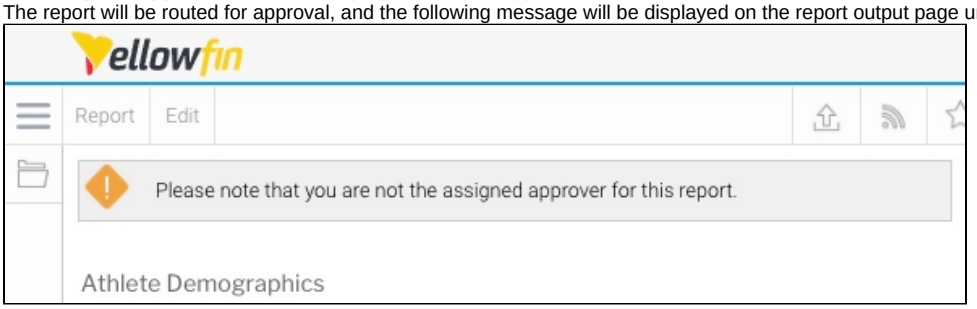
Triggering approval

If you are a user with ‘Public’ content publish rights you will be able to create public content, but will require approval if you would like to publish the content in a sub folder with approval rules applied.

1. Create a report and click Publish to save the report
2. Select the content folder you would like to publish your report to
   If you are not the designated expert approver for the sub folder, the **'This report requires expert approval'** message will be shown



3. Add a description into the **What's changed and why?** field to inform the approver of the details of the report
4. Click **Request Approval** to send the report to an expert approver
   The report will be routed for approval, and the following message will be displayed on the report output page until the report has been approved



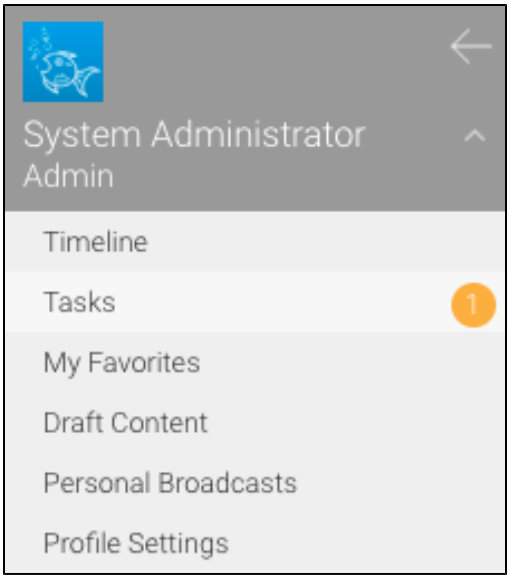
top

Approving content

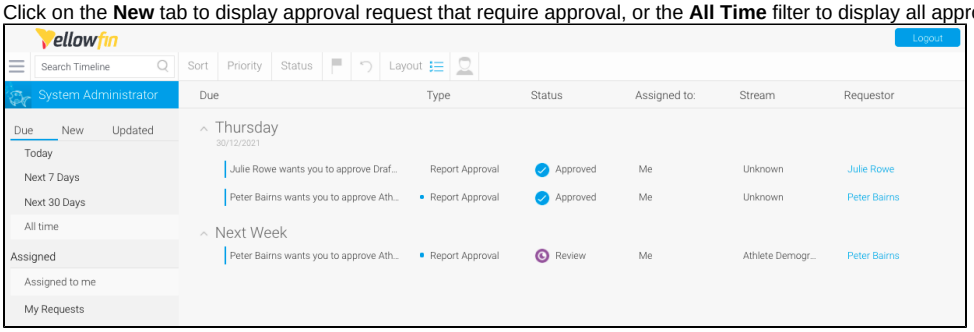
As the expert approver, content pending approval will be displayed in your Timeline and on the Tasks page.

To approve content, follow the steps below.

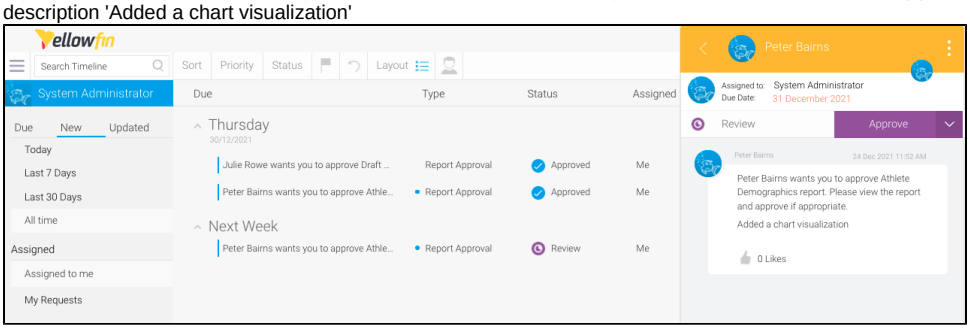
1. Click on your user profile and navigate to the **Tasks** page
   A badge will display the number of tasks requiring your attention



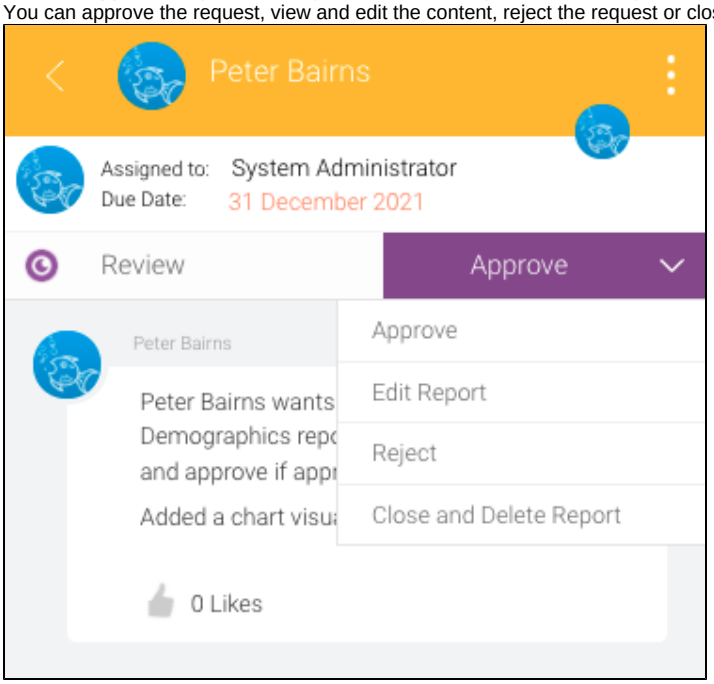
2. Click on the **New** tab to display approval request that require approval, or the **All Time** filter to display all approval requests if none are visible



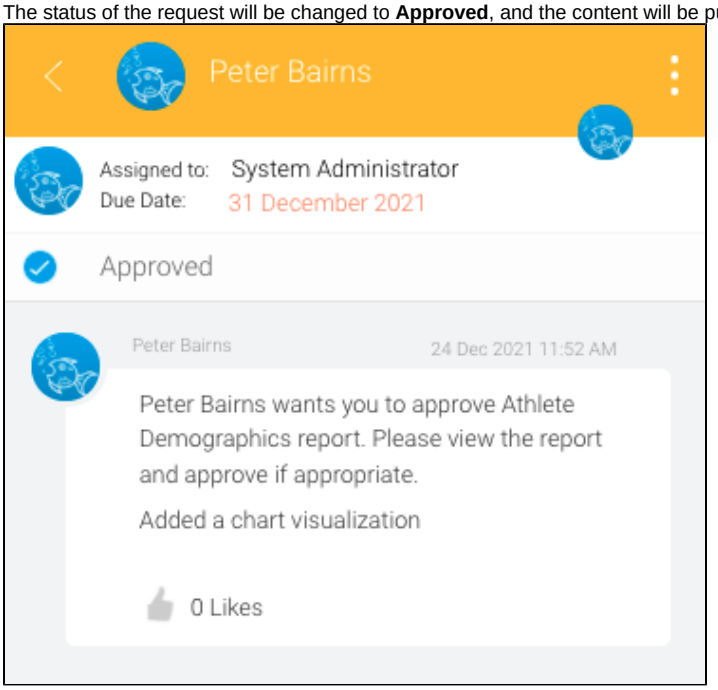
3. Click an approval request requiring review
A panel will be displayed on the right hand side of the screen showing the **Review** status next to the **Approve** dropdown, and the user's content description 'Added a chart visualization'



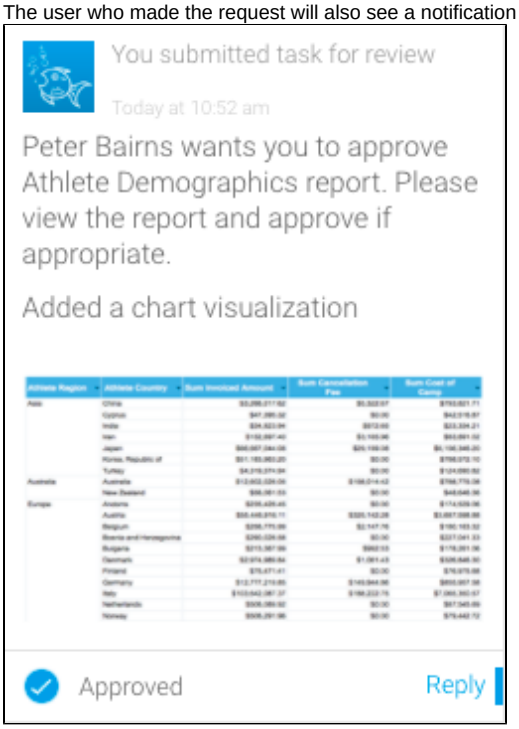
4. Click the **Approve** dropdown to display the available options for this request
   You can approve the request, view and edit the content, reject the request or close and delete the content



5. Click on **Approve** to approve the content and publish it in the restricted sub folder
   The status of the request will be changed to **Approved**, and the content will be published in the sub folder



The user who made the request will also see a notification in their Timeline, with **Approved** displayed on the bottom of the tile



Advanced users with the **Approval Admin** role permissions can perform the same functions as approvers without being selected in the content folder as an approver.

top