

# Report Approval

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## 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.

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## 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.

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## 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

Save Report

Details

Distribution

Report Settings

Refresh

Athlete Demographics

Ski Team, 23/12/2021 4:01 PM

Tutorial

Test

! This report requires expert approval.

Approval Required

Added a chart visualization

Request Approval

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

yellowfin

Report

Edit

! Please note that you are not the assigned approver for this report.

Athlete Demographics

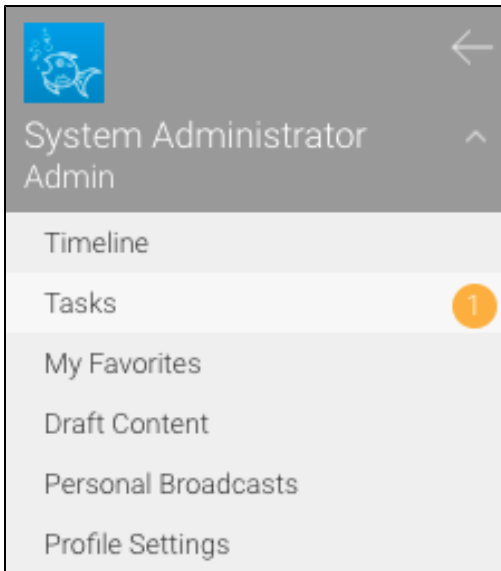
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## Approving content

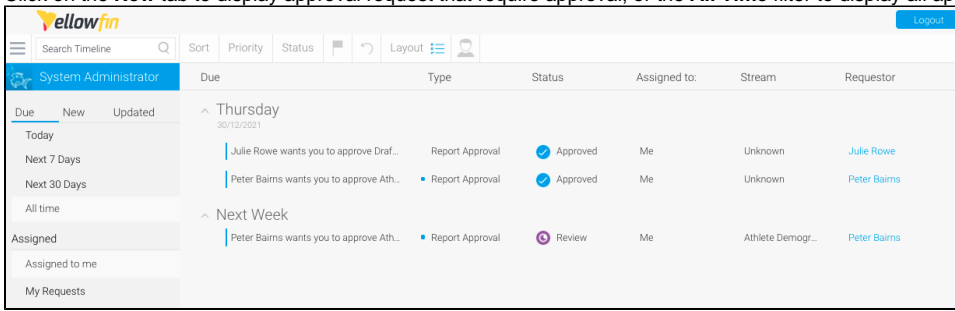
As the expert approver, content pending approval will be displayed in your Timeline and on the Tasks page.

To approve content, follow the steps below.

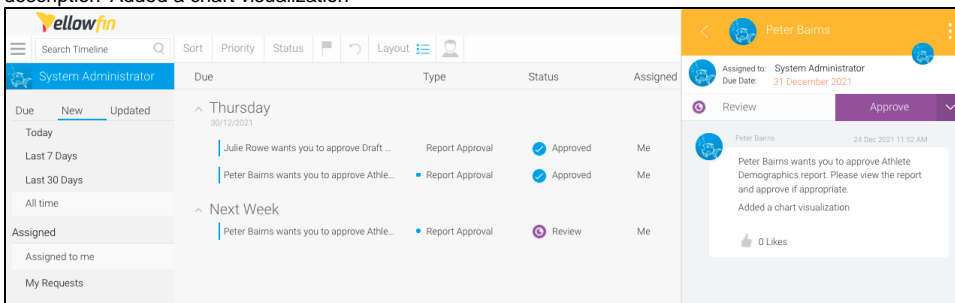
1. Click on your user profile and navigate to the **Tasks** page  
A badge will display the number of tasks requiring your attention



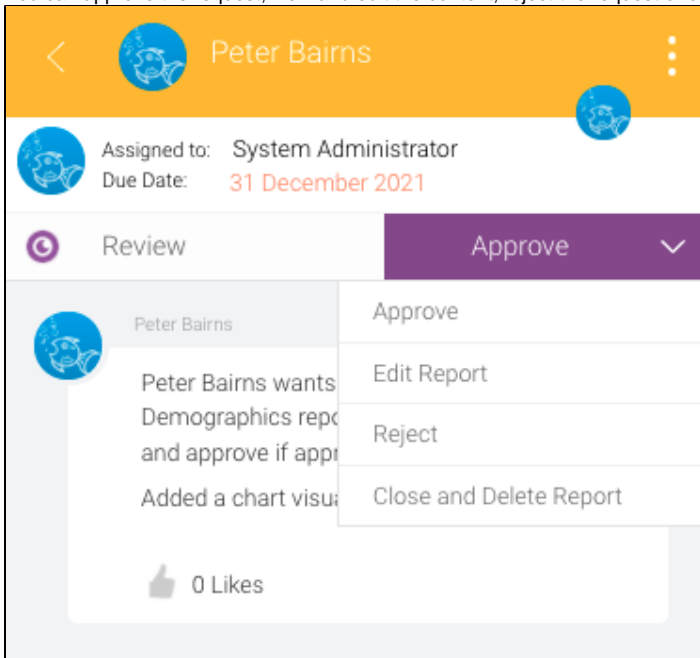
2. Click on the **New** tab to display approval request that require approval, or the **All Time** filter to display all approval requests if none are visible



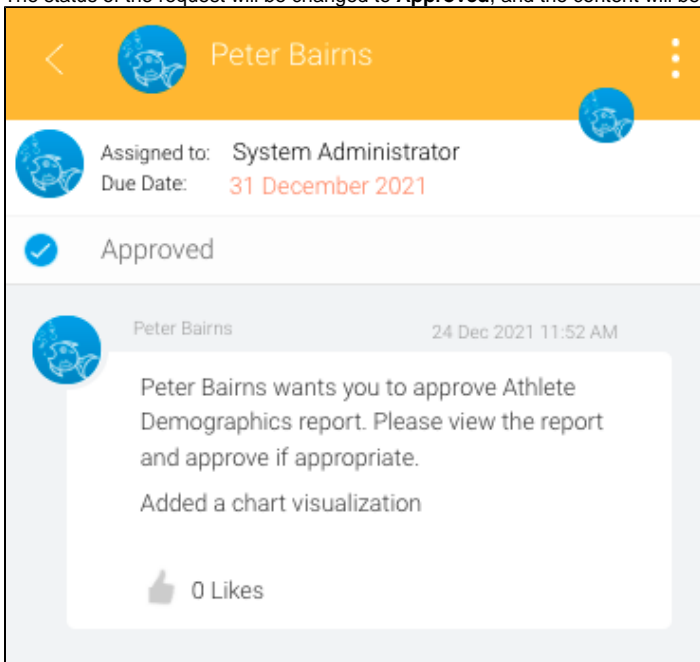
3. Click an approval request requiring review  
A panel will be displayed on the right hand side of the screen showing the **Review** status next to the **Approve** dropdown, and the user's content description 'Added a chart visualization'




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




You submitted task for review

Today at 10:52 am

Peter Bairns wants you to approve Athlete Demographics report. Please view the report and approve if appropriate.

Added a chart visualization

Continent Region	Athlete Country	Start Invoiced Amount	Rank Connection Fee	Birth Cost of Entry
Asia	China	\$2,000,011.92	\$1,000.00	\$750,001.11
	Uganda	\$47,000.00	\$0.00	\$40,010.00
	India	\$20,000.00	\$0.00	\$20,000.00
	Iran	\$10,000.00	\$1,000.00	\$10,000.00
	Japan	\$40,000.00	\$0.00	\$40,000.00
Australia	France, Republic of	\$11,100,000.00	\$0.00	\$750,010.10
	Turkey	\$0,000,000.00	\$0.00	\$0,000,000.00
	Australia	\$10,000,000.00	\$100,010.00	\$750,010.10
Europe	New Zealand	\$0,000,000.00	\$0.00	\$40,000.00
	Austria	\$20,000.00	\$0.00	\$10,000.00
	Austria	\$20,000.00	\$200,000.00	\$1,000,000.00
	Belgium	\$200,000.00	\$1,000.00	\$100,000.00
	Bosnia and Herzegovina	\$0.00	\$0.00	\$0.00
	Bulgaria	\$10,000.00	\$0.00	\$10,000.00
	Czechia	\$10,000.00	\$1,000.00	\$10,000.00
	Finland	\$10,000.00	\$0.00	\$10,000.00
	Germany	\$10,000,000.00	\$100,000.00	\$100,000.00
	Hungary	\$10,000,000.00	\$100,000.00	\$100,000.00
North America	Netherlands	\$10,000,000.00	\$0.00	\$10,000,000.00
	Norway	\$10,000,000.00	\$0.00	\$10,000,000.00

 Approved

Reply



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.

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