

Report Approval

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Overview

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Yellowfin has the ability to workflow public reports. Approval workflow is useful since it allows many users to author reports but have those reports validated by the designated expert prior to being published to a wider group of users.

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

Setting up approval rules

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For approval workflow to take effect you must define the approval experts on the Report Sub Category. In the Report Category edit page the **Publish Access and Approvals** section allows you to determine which users can publish public reports to the category.

1. If you select 'Users with Functional Access' then all users with the public report function can write to this folder
2. If you select a person or expert group – then only specified users can publish reports into that folder. If a user does not have access to publish to that folder the report will be routed to an Expert for approval.

The screenshot shows a configuration window titled "Approval Required" with a close button (X) in the top right. It has two tabs: "Description" and "User Access", with "User Access" currently selected. Under the "Description" tab, there is a section "Expert Approval Required to Publish" with the text "Publishing into this folder requires approval by an expert." and a toggle switch that is turned on. Below this is a "Folder Security" section with a red border, containing the text "All users with functional access to reports, dashboards, and/or storyboards will be able to see the content stored in this folder." and three radio buttons: "Unsecure" (disabled), "Public" (selected), and "Private" (disabled). Below the security section is a table with two columns: "Person/Group" and "Approver". The table has one row with "Administrators" in the "Person/Group" column and a blue circle icon in the "Approver" column. At the bottom of the window is a blue "Submit" button.

Once approval is required you will see the approval icon in the Report Categories list.

The screenshot shows a table titled "Content Sub Folder" with a search bar "Search folders" in the top right. The table has two columns: "Content Folder" and "Content Sub Folder". The rows are: "Training Storyboards", "Tech Training", "Tutorial", "Approval Required", "Athlete", "Camp", and "KPIs". Each row has a lock icon, a checkmark, and an 'X' icon. The "Approval Required" row has a blue circle icon in the "Content Sub Folder" column, and a tooltip "Expert Approval Required" is visible next to it.

Triggering Approval

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If you are a user with 'Public' report publish rights you will be able to create a public report. However, if you are not the designated expert for the category you wish to save your report into you will see the "This Report Requires Expert Approval" Message.

You can save your report as normal. The report will be routed to an approver for approval as well as sending that person an email prompting them to take action.

Save Report

Details

Distribution

Report Settings

Refresh

Yearly Report

Ski Team, 7/10/2016 4:15 PM

Tutorial

Approval Required

This Report requires Expert Approval

+ Add tags

Report Access

All users with Folder access will be able to view this report.

Public

Private

Save

Request Approval

Draft

You will now see the following message on the report until it is approved:

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

Yearly Report

Ski Team, 7/10/2016 4:15 PM

Year	Sum Invoiced Amount	Sum Cancellation Fee	Sum Invoice Estimate
2009	\$17,633,473	\$1,408	\$1,720,588
2010	\$8,511,470	\$693	\$1,448,944
2011	\$11,912,244	\$16,392	\$5,387,295
2012	\$81,600,100	\$172,290	\$7,437,911
2013	\$158,353,519	\$514,154	\$10,854,819
2014	\$152,912,577	\$438,584	\$12,098,888
2015	\$28,207,858	\$20,463	\$10,245,439
2016	\$12,532,605	\$0	\$798,720

Approving a Report

As the approver you will be able to login and see reports awaiting approval in your timeline – open the item to review and approve the report. You can also view this from the content page's activity stream.

Note: advanced users with "Approval Admin" role permissions are able to perform the same functions as approvers without having to be specified in the content folder as an approver.



Jacinta Doze submitted task for review

Today at 4:16 pm

Jacinta Doze wants you to approve Yearly Report report. Please view the report and approve if appropriate.

Athlete Region	Athlete Country	Sum Invoiced Amount	Sum Classification Fee	Sum Cost of Travel
Asia	China	\$1,296,017.02	\$0.00	\$760,821.71
	Cyprus	\$47,389.32	\$0.00	\$42,016.87
	India	\$36,623.04	\$0.00	\$23,224.21
	Iran	\$152,897.42	\$0.00	\$63,884.22
	Japan	\$68,667,044.08	\$26,198.08	\$4,198,348.20
Australia	Korea, Republic of	\$81,183,960.20	\$0.00	\$168,072.10
	Turkey	\$4,319,374.84	\$0.00	\$124,882.82
	Australia	\$10,802,026.26	\$188,014.42	\$788,776.08
	New Zealand	\$46,081.63	\$0.00	\$48,848.36
Europe	Andorra	\$235,428.45	\$0.00	\$174,528.28
	Austria	\$88,448,918.11	\$20,142.28	\$3,887,888.88
	Belgium	\$258,779.89	\$4,147.76	\$181,183.02
	Bosnia and Herzegovina	\$290,026.38	\$0.00	\$207,841.33
	Bulgaria	\$213,367.88	\$882.83	\$178,281.08
	Denmark	\$2,974,080.84	\$1,881.43	\$108,848.30
	Finland	\$75,471.41	\$0.00	\$76,975.88
	Germany	\$1,717,218.86	\$148,044.86	\$885,887.88
	Italy	\$103,040,087.37	\$188,222.75	\$7,885,282.87
	Netherlands	\$208,089.32	\$0.00	\$87,345.88
	Norway	\$508,281.86	\$0.00	\$78,442.72

 Review
  Reply

From here you will have the option to:

1. Approve
2. Reply
3. Edit
4. Reject
5. Close & Delete Report

Task - Report Approval



Jacinta Doze

7/10/2016 4:16 PM

Posted on [Yearly Report](#)

Jacinta Doze wants you to approve Yearly Report report. Please view the report and approve if appropriate.



Assigned to Captain SysAdmin

Due Date 14 October 2016

 Review
  Approve

Approve

Reply

Edit Report

Reject

Close and Delete Report

Once approved, the user will see a notification in their timeline feed:



You submitted task for
review
Today at 4:16 pm

Jacinta Doze wants you to approve
Yearly Report report. Please view the
report and approve if appropriate.

Athlete Region	Athlete Country	Sum Invoiced Amount	Sum Cancellation Fee	Sum Cost of Camp
Asia	China	\$1,296,017.62	\$5,302.67	\$760,601.71
	Cyprus	\$47,260.32	\$0.00	\$42,016.67
	India	\$24,000.00	\$072.66	\$23,326.21
	Iran	\$152,667.40	\$3,165.96	\$53,661.02
	Japan	\$66,667,044.08	\$26,166.08	\$5,166,346.20
	Korea, Republic of	\$01,160,060.00	\$0.00	\$766,272.10
Australia	Turkey	\$4,316,314.04	\$0.00	\$124,660.62
	Australia	\$12,660,000.00	\$166,014.42	\$766,176.06
	New Zealand	\$66,061.03	\$0.00	\$46,666.06
Europe	Andorra	\$235,426.45	\$0.00	\$174,526.06
	Austria	\$16,446,616.11	\$226,142.26	\$3,667,666.66
	Belgium	\$66,776.06	\$2,147.76	\$66,166.36
	Bosnia and Herzegovina	\$266,026.06	\$0.00	\$217,241.30
	Bulgaria	\$213,367.66	\$662.63	\$176,261.06
	Denmark	\$2,674,666.64	\$1,061.40	\$266,666.30
	Finland	\$76,471.41	\$0.00	\$76,276.66
	Germany	\$12,777,776.66	\$146,664.66	\$666,667.66
	Italy	\$103,640,067.07	\$166,002.70	\$7,666,366.67
	Netherlands	\$506,066.62	\$0.00	\$67,246.66
	Norway	\$66,261.66	\$0.00	\$76,442.72



Approved

Reply

top