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.

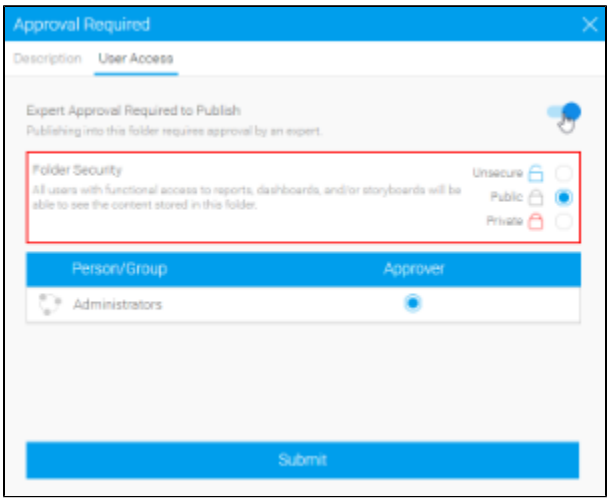
Note: Workflow is only applied to public reports. If you save a private report it will not be routed to an approver.

Setting up approval rules

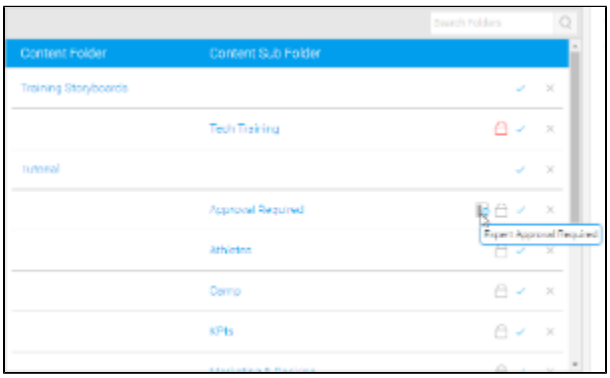
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For approval workflow to take effect you must define the approval experts on the Report Sub Category. In the Report Category edit page the **Publish Access and Approvals** section allows you to determine which users can publish public reports to the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



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

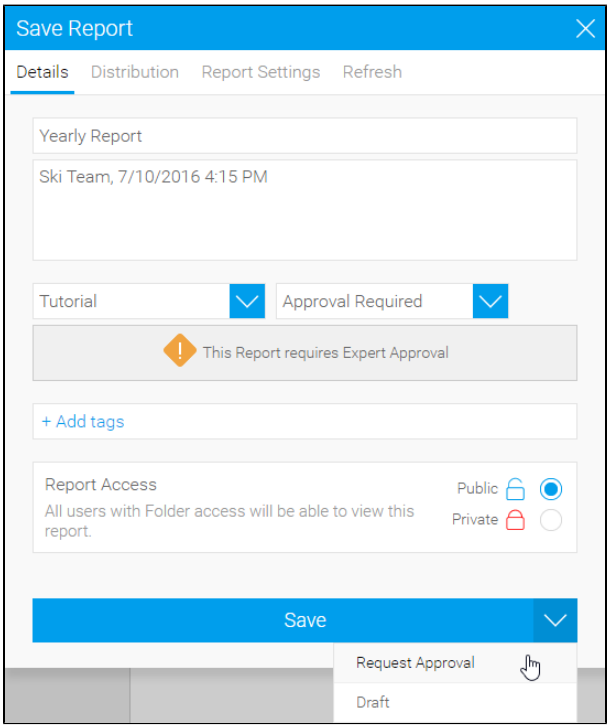


Triggering Approval

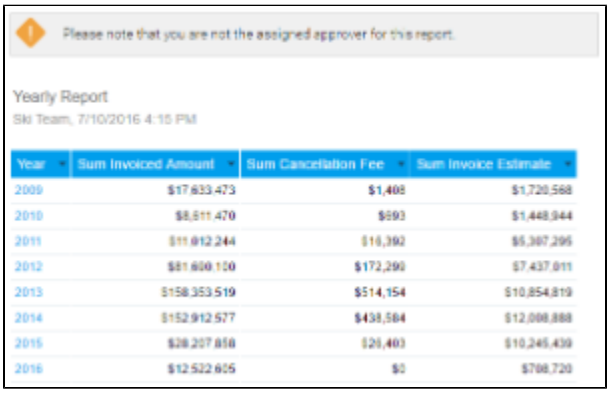
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If you are a user with ‘Public’ report publish rights you will be able to create a public report. However, if you are not the designated expert for the category you wish to save your report into you will see the “This Report Requires Expert Approval”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



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

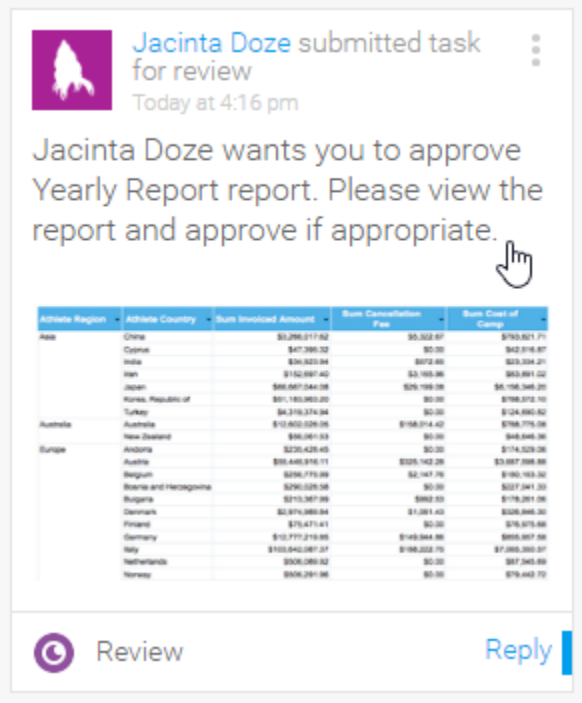


Approving a Report

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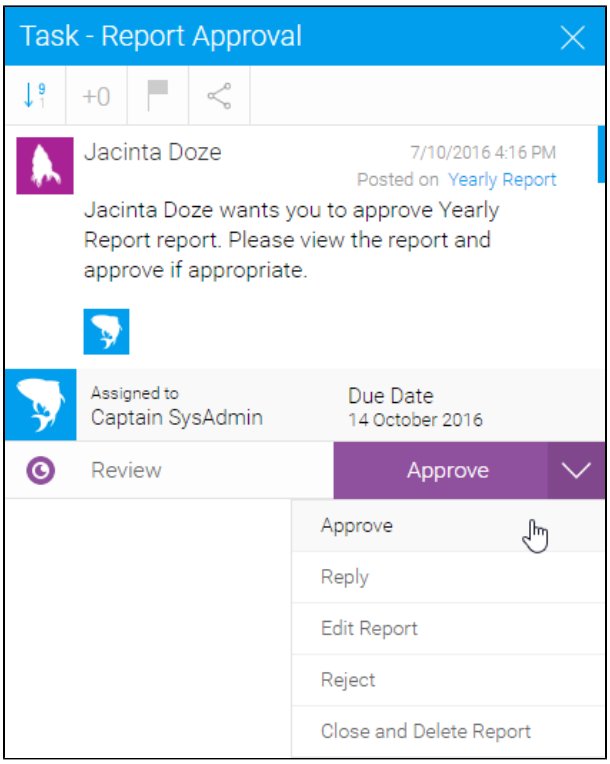
As the approver you will be able to login and see reports awaiting approval in your timeline – open the item to review and approve the report. You can also view this from the content page's activity stream.

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.

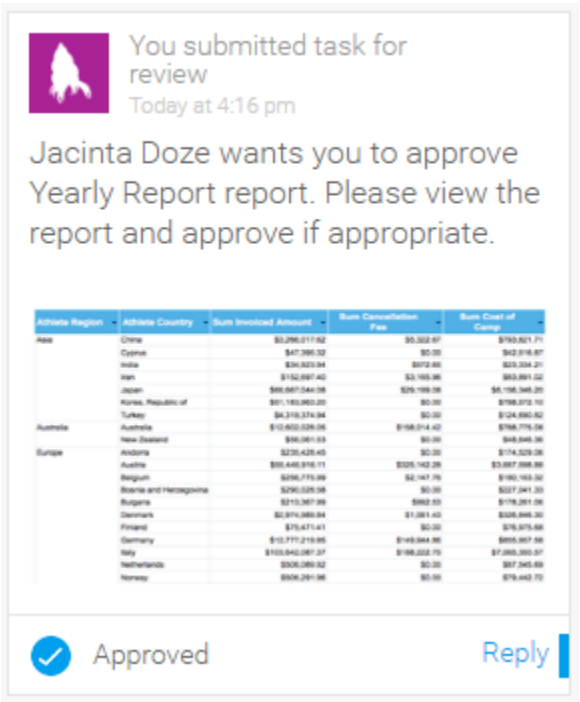


From here you will have the option to:

1. Approve
2. Reply
3. Edit
4. Reject
5. Close & 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
Cyprus
India
Iran
Japan
Korea, Republic of
Turkey
Australia
Australia
New Zealand
Europe
Andorra
Austria
Belgium
Bosnia and Herzegovina
Bulgaria
Denmark
Finland
Germany
Italy
Netherlands
Norway
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