

# Report Approval

- [Overview](#)
- [Setting up approval rules](#)
- [Triggering Approval](#)
- [Approving a Report](#)

## Overview

[top](#)

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

[top](#)

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.

---

### Publish Access and Approvals

#### Who should be able to publish public Reports to this category?

**Publish Rights:**

- ☐ Users with Functional Access  
☒ Experts only or with Expert approval

**Expert Type:**

- ☒ Person ☐ Group





**Person:**




System Administrator

 [Search](#)

---

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

Report Categories			
Category	Sub Category		
<input type="checkbox"/> Tutorial			<input checked="" type="checkbox"/>
<input type="checkbox"/> Tutorial	Charts		<input checked="" type="checkbox"/>
<input type="checkbox"/> Tutorial	Formatting		<input checked="" type="checkbox"/>
<input type="checkbox"/> Tutorial	Related Reports		<input checked="" type="checkbox"/>
<input type="checkbox"/> Tutorial	Advanced Reporting		<input checked="" type="checkbox"/>

 Add
  Edit
  Delete

## Triggering Approval

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.

ReportColumns

SaveDeleteCopyExportEditReset FormatDataHeaderSortSizeBordersTitleHeader & FooterDisplayOptionsRefreshDetails

Name:Draft Report

Description:  
Ski Team, 12/12/2011 10:01 AM

Category:Tutorial

Sub Category:Advanced Reporting

! This Report requires Expert Approval

Tags:

Demonstration

Select All / None

Add Tag:

Request ApprovalDraftCancel

## Approving a Report

[top](#)

As the approver you will be able to login and see reports awaiting approval in your inbox – click on the link to approve the report.

DashboardCreateReport ListMy ProfileAdministrationDiscussionLogoffSystem Administrator1

DrillAnalysisKPIGIS AnalysisSeries Selection

Region by Year Revenue

Year	Camp Region	Invoiced	% Of Max
2008	Asia	\$1,224,269.64	
	Australia	\$1,091,748.92	
	Europe	\$5,005,254.30	
	Latin America	\$675,908.46	
	North America	\$1,647,226.60	
2008		\$9,644,407.92	
2009	Asia	\$1,266,298.89	
	Australia	\$1,890,618.13	
	Europe	\$4,931,887.99	
	Latin America	\$289,054.96	
	North America	\$1,040,687.29	
2009		\$9,418,547.26	
2010	Asia	\$3,646,358.23	

Example Writer wants you to approve Sample Report report.

Please view the report and approve if appropriate.

12/12/2011

Edit

Reports

From here you will have the option to:

1. Approve the Report
2. Edit the Report
3. Delete the Report

OpenNewCopyExportApproveEditRejectCommentDistributeFavouritesBroadcastSubscribeDetails

[top](#)

