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.

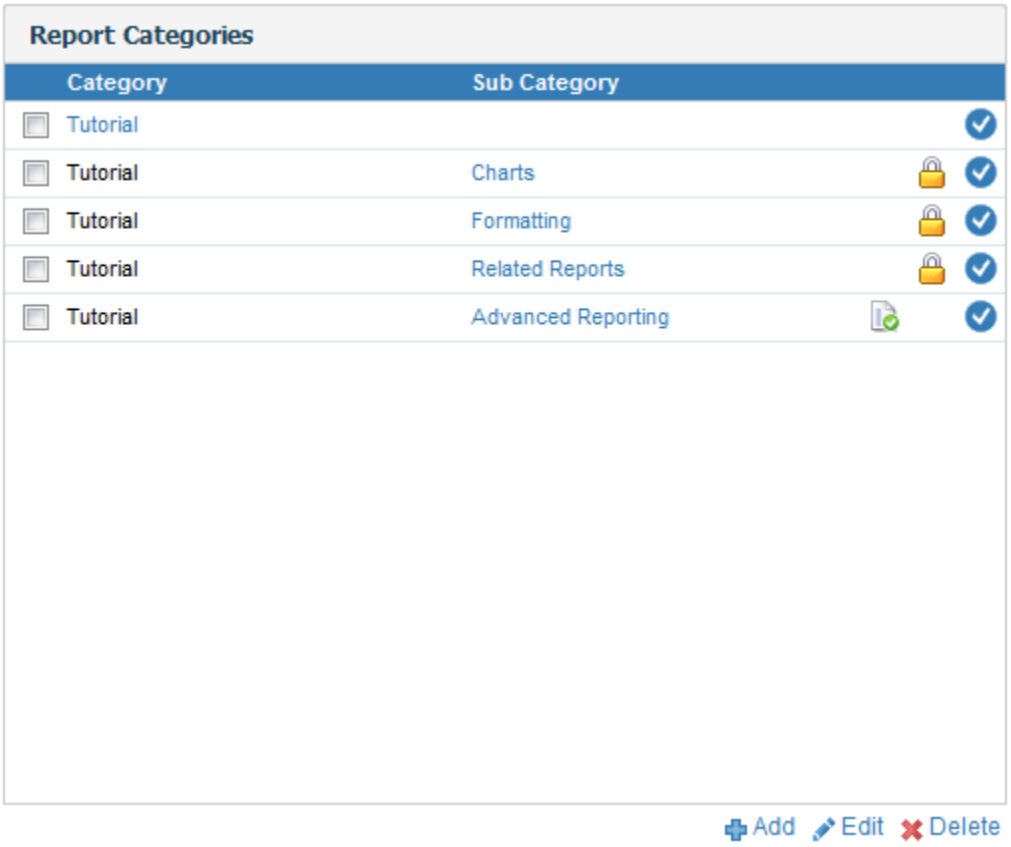
Note: Workflow is only applied to public reports. If you save a private report it will not be routed to an approver.

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.

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

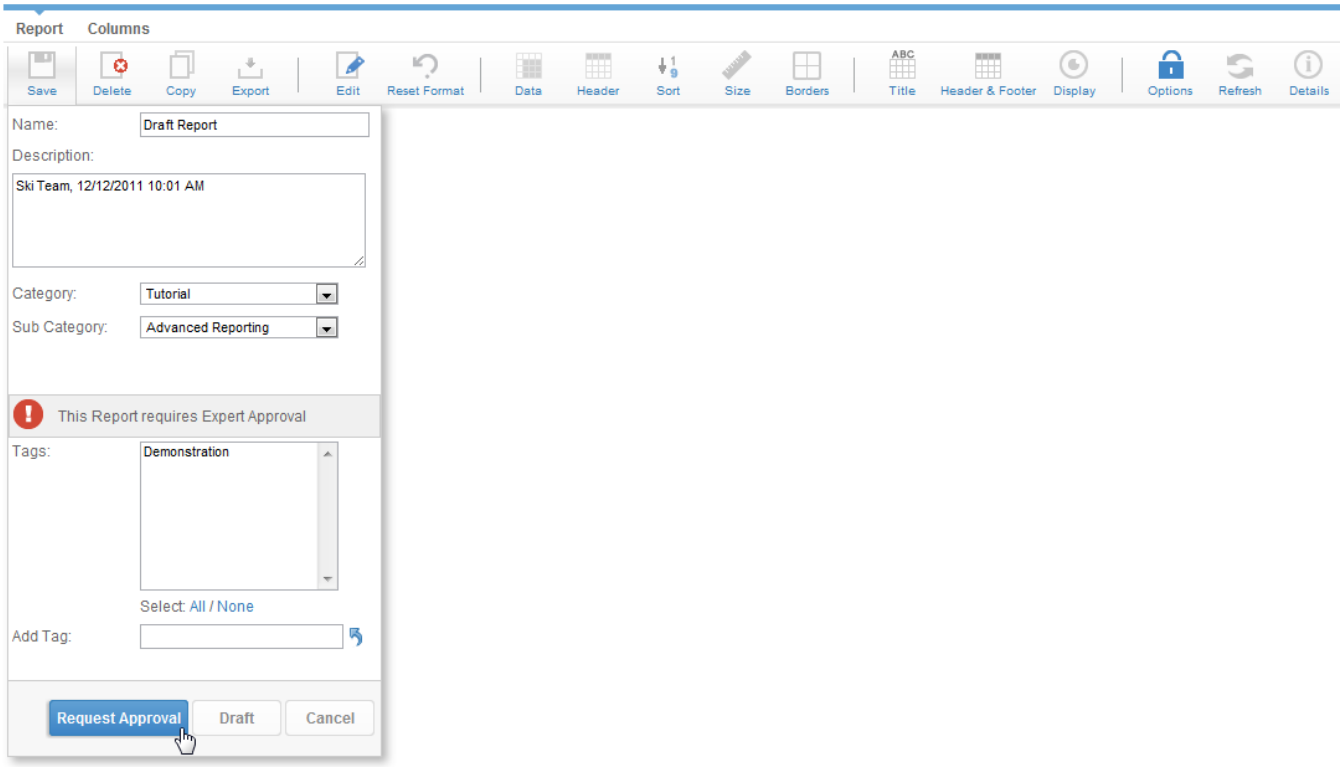


Triggering Approval

top

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.

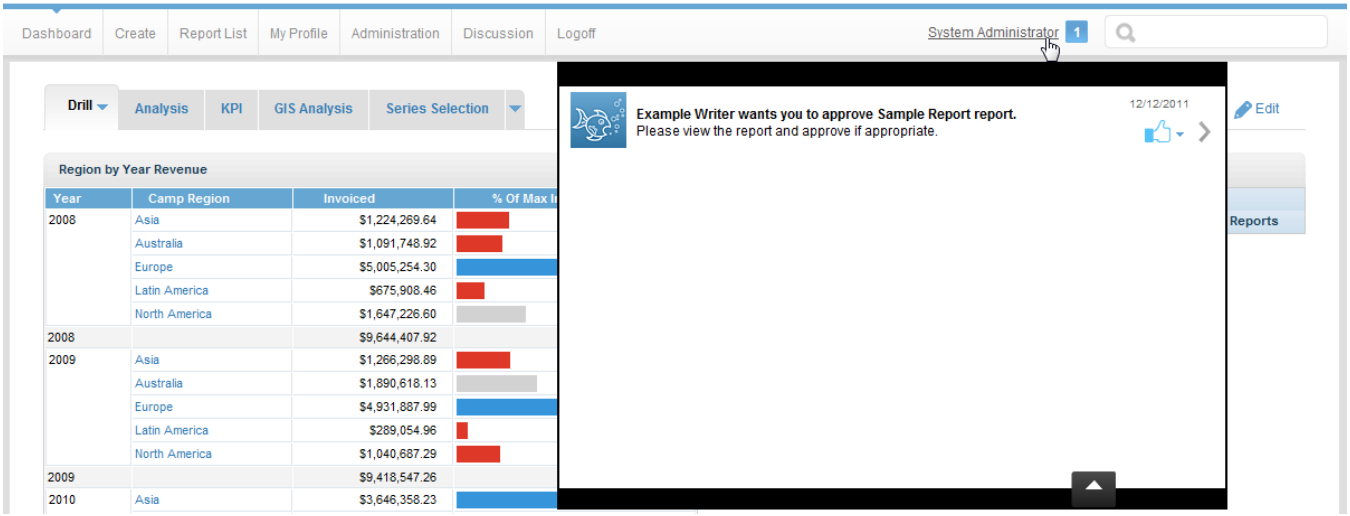
You can save your report as normal. The report will be routed to an approver for approval as well as sending that person an email prompting them to take action.



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.



From here you will have the option to:

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

top