

# Approval Process Implementation Manual

Version: 18.1

intellicus

Copyright © 2016 Intellicus Technologies

This document and its content is copyrighted material of Intellicus Technologies.

The content may not be copied or derived from, through any means, in parts or in whole, without a prior written permission from Intellicus Technologies. All other product names are believed to be registered trademarks of the respective companies.

**Dated: December 2016**

## **Acknowledgements**

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: <http://www.intellicus.com/acknowledgements.htm>

## Contents

1 Introduction	4
2 Configuring Intellicus for Approval Process	5
Configuring Application	5
Configuring User preferences	6
Configuring Reports	8
3 Working with Report Approvals	10
What you can do to a pending report	10
What happens to a report	10
Approval Process: Working with comments	11

# 1 Introduction

The Approval Process feature enables users to collaborate and approve the report before it is publicly published. When a report is publicly published, it appears in Published report list page of all the users who have access rights to view that report.

This feature enables users to reject a report if it does not have data that can be or needs to be published.

The Approval Process feature needs to be setup before it can be used.

**Important:** This feature is not part of the standard application. You need to have a license to use the Approval Process feature.

## 2 Configuring Intellicus for Approval Process

Configuring Intellicus for Approval Process includes:

- **Configuring Application.** In this process, you enable the feature and name states in the approval process.
- **Configuring User Preferences.** In this process, you can choose whether to receive approval process related emails or not. Also as a super administrator, you can customize text that will be sent as the email.
- **Configuring Reports.** Here, you associate approval process with a report as well as select users for the role of approvers and commenters.

### Configuring Application

In order to configure the application for Approval Process, you need to do the following:

- Enable the feature (on **Server** page)
- Name states in approval process (on **Approval Process** page)

### Activating (enabling) Approval Process

To open the **Server** page, click Navigate > Administration > Configure > Server.

On **Server** page, navigate to 'Saved Report Approval Required' property under Compliance. Select "Enable" to set the report publishing approval process.

The screenshot shows the 'Administration > Configure > Server' page. The 'COMPLIANCE' tab is selected in the left sidebar. The 'Saved Report Approval Required' property is highlighted in blue, with its value set to 'Enable'. Other properties visible include 'Audit Log' (Enable), 'Audit Log Purge Time (days)' (30), 'Audit RPG Purge Time (days)' (7), 'Withhold Purge Till Archive' (Disable), 'Archive Frequency (days)' (30), 'Published Reports Visibility' (Global), 'Login Mode' (1), and 'Extended Input Validation' (Disable). The 'Folder Listing Access Check Level' is set to 0.

Figure 1: Setting the property value to enable on Server page

Click the **Save** button after enabling the property.

## Naming the Approval Process States

To open the Approval Process page, click Navigate > Administration > Secure Data > Approval Process.

You can specify the below on the Approval Process page:

- **Name:** Give a name to the approval process.
- **Pending:** This state indicates that the report is yet to be approved or rejected.
- **Rejected:** This state indicates that the report is rejected. A rejected report is not publicly published.
- **Approved:** This state indicates that the report is approved. An approved report is publicly published.

State	Caption
Pending	Pending
Rejected	Rejected
Approved	Approved

Figure 2: Approval Process

In **Name** entry box, specify approval process name.

**Specify** caption that should be displayed on Add Comment dialog box for Pending, Rejected and Approved actions.

**Note:** In this document we have considered **Pending**, **Rejected** and **Approved** as the captions.

Buttons on the page

- **Save:** To save the changes.
- **Cancel:** To abandon the changes.
- **Delete:** To delete the workflow.

## Configuring User Preferences

E-mail message

With reference to Approval Process, application can mail you (you are an approver or a commenter) when:

- A report is published and is pending for approval
- A report is pending for approval and someone has commented it
- A report is pending for approval is approved or rejected

You can customize the text used in these mails by changing the content of following files respectively.

- ReportApprovalProcessReportPublishMessage.txt
- ReportApprovalProcessCommentAddMessage.txt

- ReportApprovalProcessStatusUpdationMessage.txt

\\Intellicus\ReportEngine\Config\messages\mails				
Name	Size	Type	Modified	
AsynchronousFailureMessage.txt	1 KB	Text Document	3/10/2008 4:01 PM	
AsynchronousSuccessMessage.txt	1 KB	Text Document	1/24/2008 6:32 PM	
attachemailmessage.txt	1 KB	Text Document	3/10/2008 3:47 PM	
ExecutionRejectionMessage.txt	1 KB	Text Document	3/10/2008 3:46 PM	
JobErrorMessage.txt	1 KB	Text Document	2/15/2008 5:53 PM	
JobSuccessMessage.txt	1 KB	Text Document	2/15/2008 5:52 PM	
linkemailmessage.txt	1 KB	Text Document	3/10/2008 3:46 PM	
MemoryExceededMessage.txt	1 KB	Text Document	3/10/2008 3:47 PM	
ReportApprovalProcessCommentAddMessage.txt	1 KB	Text Document	3/10/2008 3:48 PM	
ReportApprovalProcessReportPublishMessage.txt	1 KB	Text Document	3/10/2008 3:48 PM	
ReportApprovalProcessStatusUpdationMessage.txt	1 KB	Text Document	3/10/2008 3:48 PM	

Figure 3: Approval Process related message files

These files are placed on machine where the report server is running at the below path:

<installation\_folder>\Intellicus\ReportEngine\Config\messages\mails

## E-mail Preferences

Application users can set their e-mail preferences on **User Preferences** tab under **Personalization > Preferences** page.

The screenshot shows the 'Preferences for Admin' page. The 'Send Email' section is expanded, showing the following configuration:

- To Email Address:** emailid@intellicus.com
- For:**
  - All
  - Approval Process
  - Asynchronous Report Completion
  - Fault Tolerance
  - Memory Trigger
  - Request Rejection on Memory Trigger

Figure 4: Setting e-mail preferences to receive approval and status alerts

To receive approval process related mail, select **Approval Process** checkbox under **Send Email** group. Make sure you have provided the email ID.

Click **Save** button after making the changes.

## Report Access Rights for users

Following table lists the access rights that particular user should have to work with report approvals:

User	Report Access Rights required
Super Administrator	--
Administrator	--
User	Run Report and Publish right for a report / category.

**Note:** Whether a user can approve a report or comment a report is set for each report during deployment.

## Configuring Reports

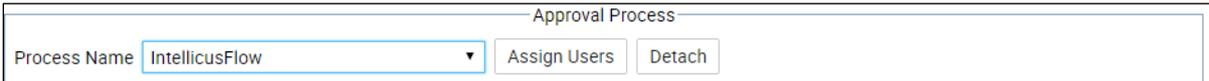
When a report that has to undergo approval process before it is published, you need to associate it with approval process at the time of report deployment.

**Note:** This can be done even after the report is deployed.

This process is done on **Manage Folders and Reports** page. To open this page, click Navigate > Repository > Manage Folders and Reports.

On this page, navigate to the Folder where the report to associate with Approval Process is deployed and select the report.

To associate with approval process



Approval Process

Process Name IntellicusFlow ▼ Assign Users Detach

Figure 5: Approval Process properties on Manage Folders and Reports page

To specify approval process, select name from **Process Name** drop-down box.

You need to select users who will act as Approver / Commenter. Click **Assign Users** button to get **Approval Process Access Rights** dialog box.

On **Approval Process Access Rights** dialog box,

Assignee	Approver	Commenter
Everyone	<input type="checkbox"/>	<input type="checkbox"/>
Intellica	<input type="checkbox"/>	<input type="checkbox"/>
<b>Users</b>		
Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Designer	<input type="checkbox"/>	<input type="checkbox"/>
User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Roles</b>		

Figure 6: Giving approval process rights

A user who is given Approver rights is automatically given Commenter rights.

After making the changes, click **Set** to save the changes.

**Note:** Changes will be saved at the time of saving the page. So, don't forget to click **Save** button on the page after making the changes.

To detach approval process

When you try detaching approval process from a report, it is quite possible that the report has been published and is yet to be approved or rejected. Before detaching approval process from the report you need to decide what you want to do with such pending reports.

Click **No Approvals** button to get **Action on Pending report outputs** dialog.

What should the system do with pending outputs?

Approve     Reject

Ok    Cancel

Figure 7: Detaching approval process

On this dialog, select **Approve** or **Reject** based on the need. Click **OK** to proceed.

### 3 Working with Report Approvals

Report Approval comes into picture when a report is publicly published. A report can be published in any of the following ways:

Published as delivery option (**Report Delivery Options** page)

Published after viewing the report (For example from HTML Viewer, published as post-view operation)

Published through scheduling (batch scheduler or quick scheduler)

When a report associated with approval process is published, it gets listed on your **Pending Reports** page if you are:

Owner (the one who published the report)

Approver

Commenter of the report.

#### What you can do to a pending report

You are a	What you can do
Owner	Can do nothing related to report approvals if you are not Approver or commenter of the report.
Approver	Specify comments, Approve or Reject a report.
Commenter	Specify comments on the report. Cannot approve or reject the report.

#### What happens to a report

##### A commented report

The report will continue to appear in **Pending Report List**. A commenter (or approver) can comment it.

##### An Approved Report

The report will be removed from **Pending Report List**. It will be published and will appear on **Saved Report List**. All users who have rights to view it will be able to view and view comments for the report.

**Important:** Status of the approved report cannot be changed to Rejected.

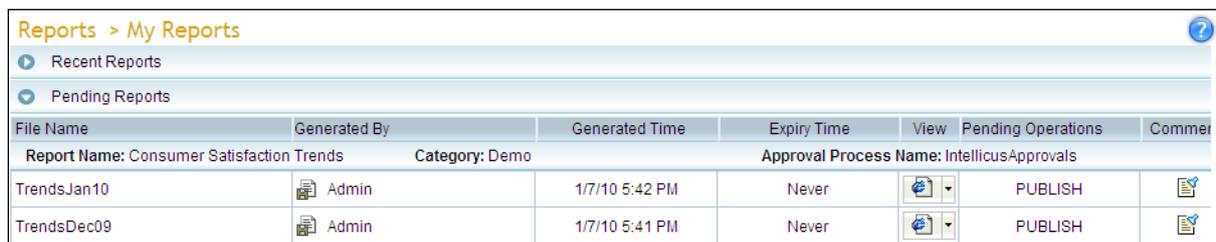
## A rejected report

The report will be removed from **Pending Report List**. It will appear in **Saved Report List** but only to the *Owner* and the *Super Administrator*.

**Important:** Status of the rejected report cannot be changed to **Approved**.

## Delay in delivery

A report is published in a selected output type. If report delivery option for a report is email or FTP the report operation will not be started until the report is approved.



File Name	Generated By	Generated Time	Expiry Time	View	Pending Operations	Commer
<b>Report Name:</b> Consumer Satisfaction Trends <b>Category:</b> Demo <b>Approval Process Name:</b> IntellicusApprovals						
TrendsJan10	Admin	1/7/10 5:42 PM	Never		PUBLISH	
TrendsDec09	Admin	1/7/10 5:41 PM	Never		PUBLISH	

Figure 8: Pending Operations (causing delay in delivery)

**Pending Operations** column on **Pending Reports List** page will list all the pending operations for the report.

## Approval Process: Working with comments

You can work on report approval in multiple ways:

Publish action from Report Delivery Options page

When a report is published from **Report Delivery Options** page, it will be listed in **Pending Reports List** page after it is generated. You can View this report in HTML to open it in HTML Viewer, and comment it.

View action from Report Delivery Options page

When you generate a report for VIEW (in HTML) from **Report Delivery Options** page, it will open in HTML viewer. The report needs to be published before you can work with approvals.

On HTML Viewer, when you click **Add Comment** button, a dialog box to publish the report will appear for you to publish the report. You can specify approval comments and also publish the report there itself.

Scheduled to be published

When a report is published as scheduled generation, once it is generated, it will be listed in **Pending Reports List** page. You can View this report in HTML to open it in HTML Viewer, and comment it.

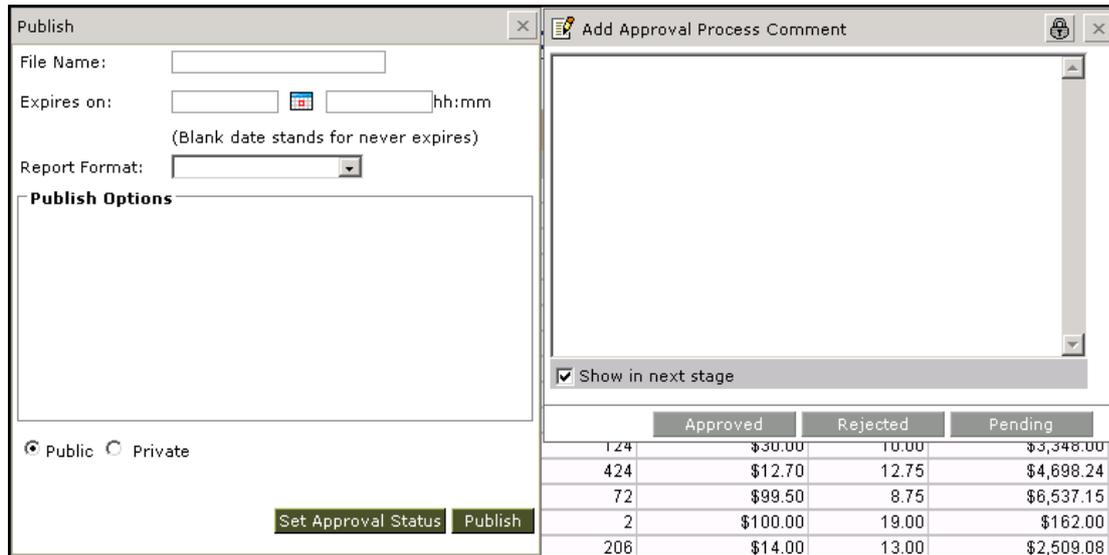
## Publishing and commenting as post view operation

If you are report owner, then you can view the report, publish it as well as comment right from HTML Viewer.

General steps on HTML Viewer are:

1. Click **Add Comment** button.
2. On **Publish** dialog, specify publish related information.
3. Click **Set Approval Status** button.
4. On **Add Comments** dialog, specify approval comments and click respective button.
5. Back on **Publish** dialog, click **Publish** button.

Figure 9: Publish and work with approval as post-view operation



## Add Comment Dialog

**Add Comment** dialog appears when you click **Add Comment** button on HTML Viewer. It has area to specify comment text and approval related buttons.

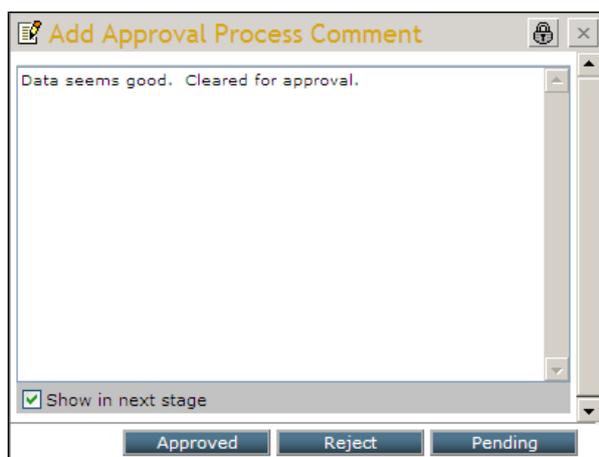


Figure 10: Add Approval Process Comment dialog box

Button caption and window title will depend on the text specified on **Approval Process** page.

Select **Show in next stage** if you want users to view the comment when the report is approved / rejected.

## Approving a report

To approve a report,

1. From the page where the pending report is listed, open the report in HTML.
2. Click **Add Comments** button.
3. On **Add Comments** dialog, specify comment text (optional) and click **Approve** button.

## Rejecting a report

To reject a report,

1. From the page where the pending report is listed, open the report in HTML.
2. Click **Add Comments** button.
3. On **Add Comments** dialog, specify comment text (optional) and click **Rejected** button.

## Commenting a report

You can add comments on a pending report or a published report.

To comment a report,

1. From the page where the report is listed, open the report in HTML.
2. Click **Add Comments** button.
3. On **Add Comments** dialog, specify comment text (optional) and click **Add Comment** button.

## Accessibility options for comments

While commenting, you have options to choose the users who should be able to view the comments.

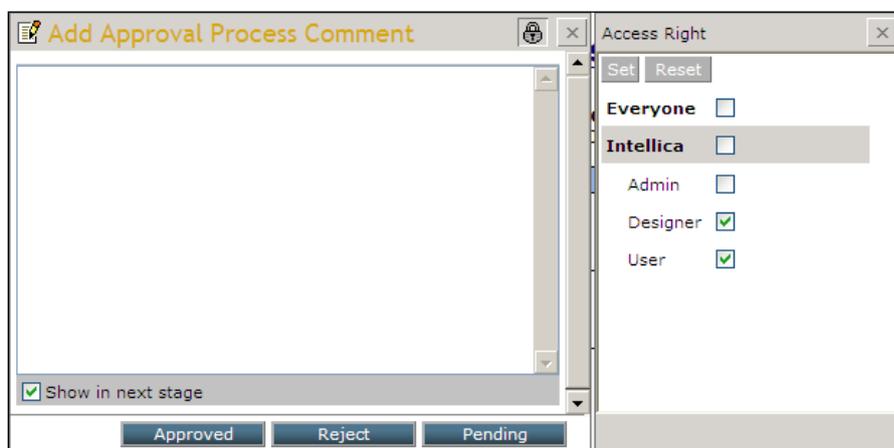


Figure 11: Selecting users who can view comments

On **Add Comment** dialog, click  icon. **Access Right** dialog opens up. Select the users who should be able to view the comments.

## Viewing comments on a report

Report owner (the person who executed the report), approver / commenter and super administrator can view comments on a report that is published, rejected as well as is pending.

A report is considered published only after it is approved. All others who have access privilege to view that report will be able to view comments after the report is approved. Published reports are listed on:

- Saved Report List page (Report List for a category > Publish icon for a report)
- All Published Reports page ([Reports] > All Published Reports)

Pending Reports						
File Name	Generated By	Generated Time	Expiry Time	View	Pending Operations	Comments
Report Name: Consumer Satisfaction Trends		Category: Demo		Approval Process Name: IntellicusApprovals		
CustTrrNov09	Admin	1/7/10 6:23 PM	Never		PUBLISH	
TrendsDec09	Admin	1/7/10 5:41 PM	Never		PUBLISH	

Figure 12: Icon to be clicked to view comments for the report

To view comments on a published report, click button in the row of that report when the report is listed on any of the above pages.

## Printing comments along with the report

To print a published report, you need to open it in HTML Viewer.

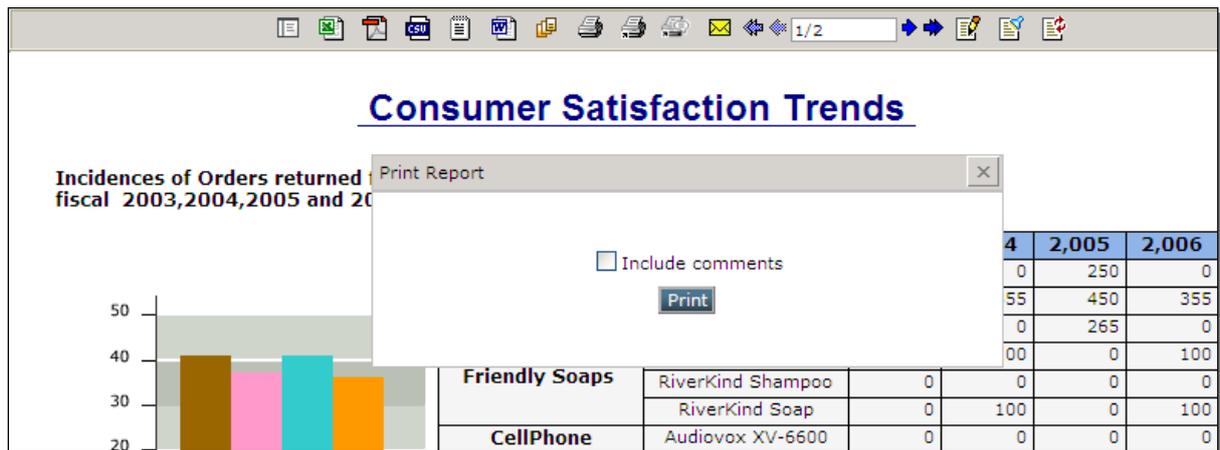


Figure 13: Printing comments along with the report

On HTML Viewer, when you click Print button to print the report Print Report dialog box appears having **Include comments** checkbox on it. Select the checkbox to print comments along with the report.

## Deleting Comments

For security reasons, application does not allow deleting comments made on its reports.

