

# Approval Process Implementation Manual

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Intellicus Enterprise Reporting and BI Platform



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## **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> .

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## Introduction

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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.

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 Approval Process feature.



## Configuring Intellicus for Approval Process

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Configuring Intellicus for Approval Process includes:

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

## Configuring Application

In this process we:

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

### Activating (enabling) Approval Process

To open **Server** page, click Navigation > Administration > Configure > Server.

| Administration > Configure > Server   |                                    |
|---------------------------------------|------------------------------------|
| Databases                             | Server                             |
| Client                                | Viewer                             |
| Adhoc Wizard                          | Portal Menu                        |
| Print Settings                        | License                            |
| Config Files                          |                                    |
| Save Cancel                           |                                    |
| Listener IP Address                   | <input type="text"/>               |
| Listener Port                         | <input type="text" value="45450"/> |
| Database Connection TimeOut (seconds) | <input type="text" value="600"/>   |

Figure 1: **Server** page

On **Server** page, navigate to "Saved Report Approval Required" property. Set from the dropdown box, select Enable.

|                                |   |
|--------------------------------|---|
| Archive Frequency (days)       | <input type="text" value="30"/>         |
| Archive Directory              | <input type="text" value="./archives"/> |
| Saved Report Approval Required | Enable ▾                                |
| Exit On Error                  | Disable ▾                               |

Figure 2: Setting the property value to enable

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

### Naming the states

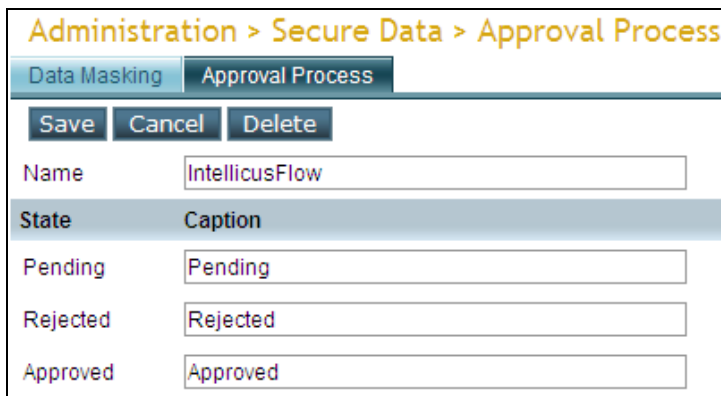
Approval Process states is:

- **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.



## Configuring Intellicus for Approval Process

To open this page, click Navigation > Administration > Secure Data > Approval Process.



| Administration > Secure Data > Approval Process |   |
|---|---|
| Data Masking   Approval Process                 |   |
| Save   Cancel   Delete                          |   |
| Name  | <input type="text" value="IntellicusFlow"/> |
| State   | Caption                                     |
| Pending   | <input type="text" value="Pending"/>        |
| Rejected  | <input type="text" value="Rejected"/>       |
| Approved  | <input type="text" value="Approved"/>       |

Figure 3: 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 manual 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

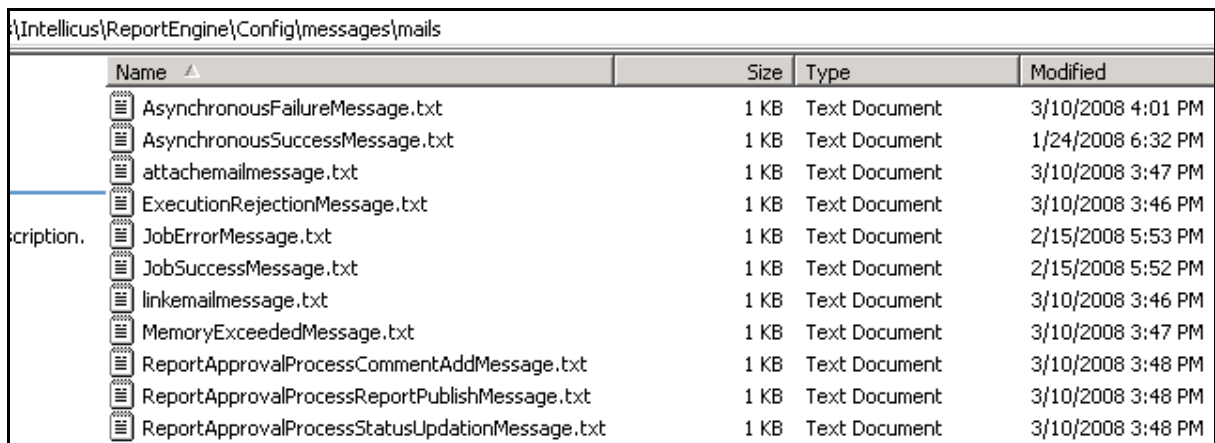
### E-mail message

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

- A report is published and is pending of 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



| 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 4: Approval Process related message files

These files are placed on machine running report server at path:

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

### E-mail preferences

Application users can set their e-mail preferences on **User Preferences** tab of **My Preferences** page.

## Configuring Intellicus for Approval Process

The screenshot shows the 'Personalization > My Preferences for Admin' page. The 'Send Email' section is highlighted with a red circle around the 'To Email Address' field, which contains 'id@emailID.com'. An arrow points to the 'Approval Process' checkbox, which is checked. Other options in the 'Send Email' section include 'All', 'Asynchronous Report Completion', 'Fault Tolerance', 'Memory Trigger', and 'Request Rejection on Memory Trigger'. The 'Change Password' section has fields for 'Current Password', 'New Password', and 'Confirm New Password'. The 'Portal Preferences' section has dropdowns for 'Default Locale', 'Default Time Zone', 'Default Portal Theme', 'Default Report Format', and 'Default Adhoc Template', along with a 'Use My Browser Time Zone' checkbox and a 'Recent Report Count' field. The 'My Default Connection' section has a 'Select Connection' dropdown set to '(Default)'. A 'Save' button is located at the top left of the form.

Figure 5: 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 anytime after report is deployed as well.

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

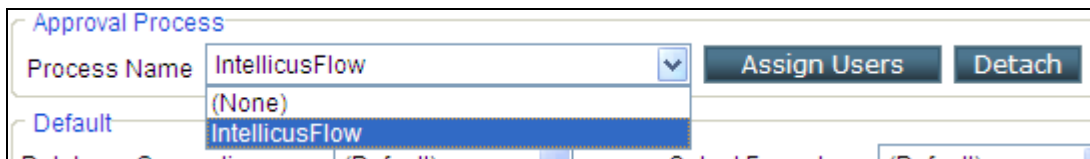


Figure 6: Approval Process properties on Manage Folders and Reports page

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"/>            |
| Users     |                                     |                                     |
| Admin     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Designer  | <input type="checkbox"/>            | <input type="checkbox"/>            |
| User      | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Roles     |                                     |                                     |

Figure 7: Giving approval process rights

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

## Configuring Intellicus for Approval Process

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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.

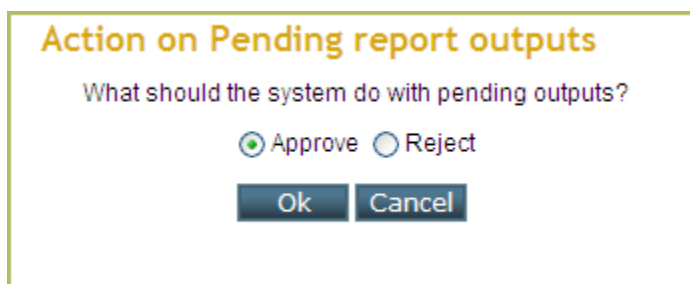


Figure 8: Detaching approval process

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



## Working with Report Approvals

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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  |
|------------------|--|
| <b>Owner</b>     | Can do nothing related to report approvals if you are not Approver or commenter of the report. |
| <b>Approver</b>  | Specify comments, Approve or Reject a report.  |
| <b>Commenter</b> | 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 | Comments |
|---|--------------|----------------|-------------|------|--------------------|----------|
| Report Name: Consumer Satisfaction Trends      Category: Demo      Approval Process Name: IntellicusApprovals |              |                |             |      |                    |          |
| TrendsJan10   | Admin        | 1/7/10 5:42 PM | Never       |      | PUBLISH            |          |
| TrendsDec09   | Admin        | 1/7/10 5:41 PM | Never       |      | PUBLISH            |          |

Figure 9: 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:

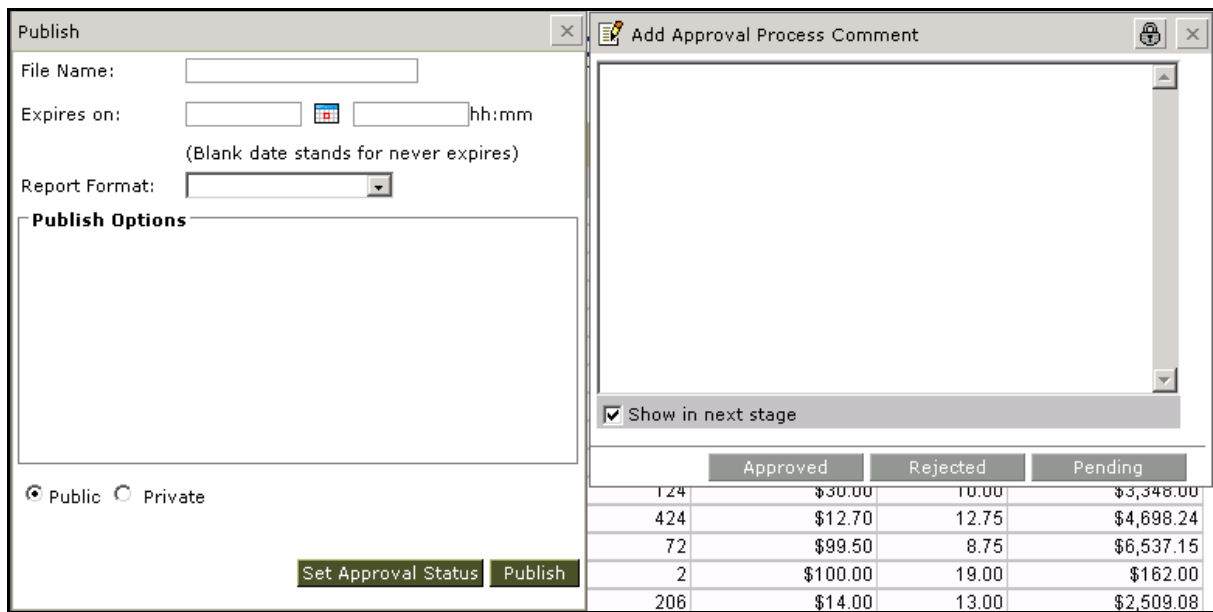


Figure 10: Publish and work with approval as post-view operation

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.

### 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.

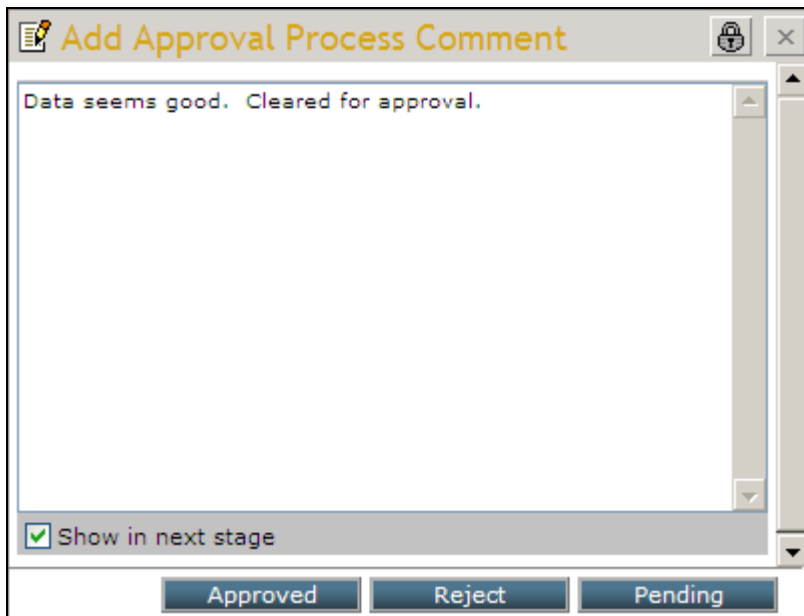


Figure 11: Add Approval Process Comment dialog box

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.

## Working with Report Approvals

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.

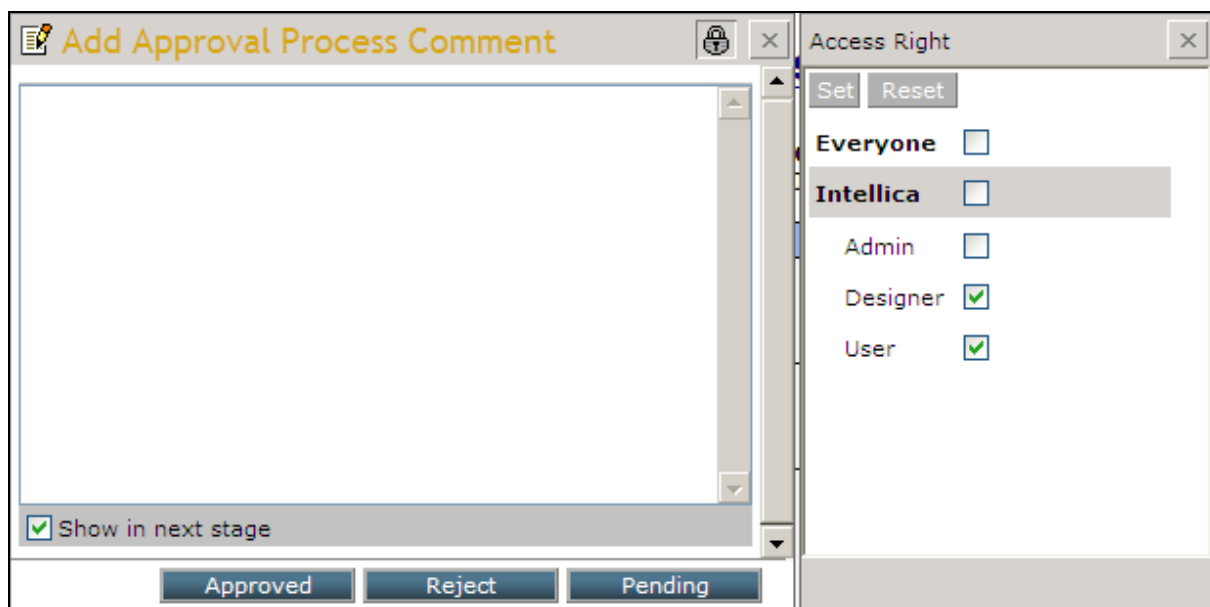



Figure 12: Selecting users who can view comments

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:

## Working with Report Approvals

- 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 | Commer |
| Report Name: Consumer Satisfaction Trends |              | Category: Demo |             | Approval Process Name: IntellicusApprovals |                    |          |        |
| CusTrfNov09                               | Admin        | 1/7/10 6:23 PM | Never       |  | PUBLISH            |          |        |
| TrendsDec09                               | Admin        | 1/7/10 5:41 PM | Never       |  | PUBLISH            |          |        |

Figure 13: 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.

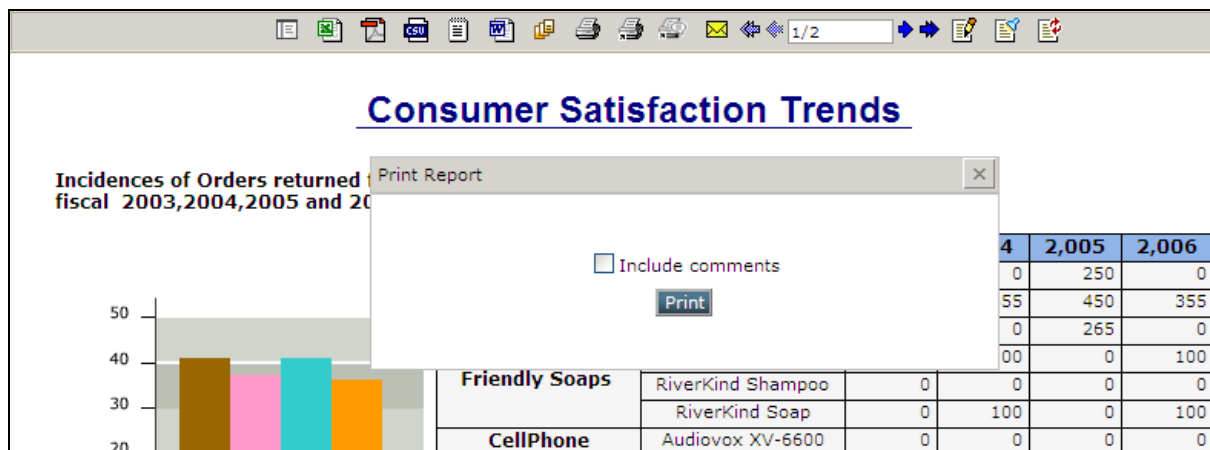


Figure 14: Printing comments along with the report

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.



