Approval - Report generation

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AT A GLANCE:

01. Login to Approval

02. Locate approval in the Dashboard

03. Select the Annotation Report option

04. Select the report options

05. Download your report

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01. Login

To access approvals go to your URL and login using your individual username and password.

02. Locate the approval in the dashboard

In the Approval Dashboard, locate the required approval.

In thumbnail view, hover over the required approval, the tool bar option will appear in the top right of the approval.

In list view the tool bar icon will appear at the end of each approval line.

03. Select the annotation report Option

Select the tool drop down and select the Annotations Report option. The Annotations report window will open.

Note: The Annotations report option will not be available in the drop down list unless annotations have been placed on the page.

04. Select the report options

Within the Annotations Report window select, detailed view.

Select the number of comments per page, this will default to 10 this can be increased or decreased if required.

All users annotations will appear on the report. These can individually selected or deselected if required.

Select Ok to generate your report.

05. Download your report

Your Annotations report will immediately generate and appear on screen.

Select the print button at the top of the report to print
or download the report. The download or print options will vary depending on the browser and browser settings used.

Note : Annotation reports can also be created from within the Approval application

SEE ATTACHED DOCUMEnT

Attachments

- WL012_ApprovalC_Reports_QRG_1.0.pdf (26.12 KB)

Related Content

- Approval - Annotations and approvers
- Approval - Creation