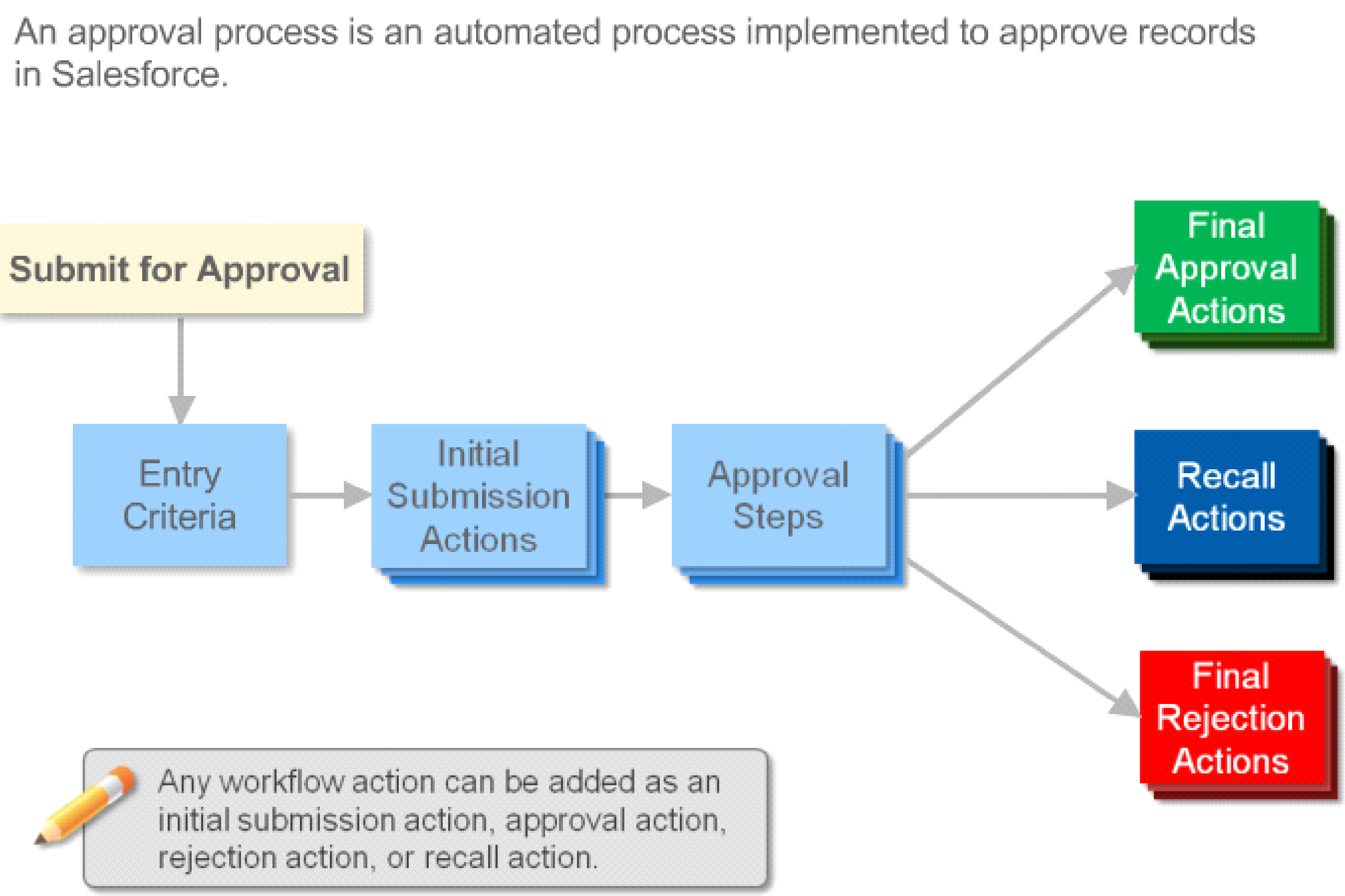
Streamline Requests with Approval Processes

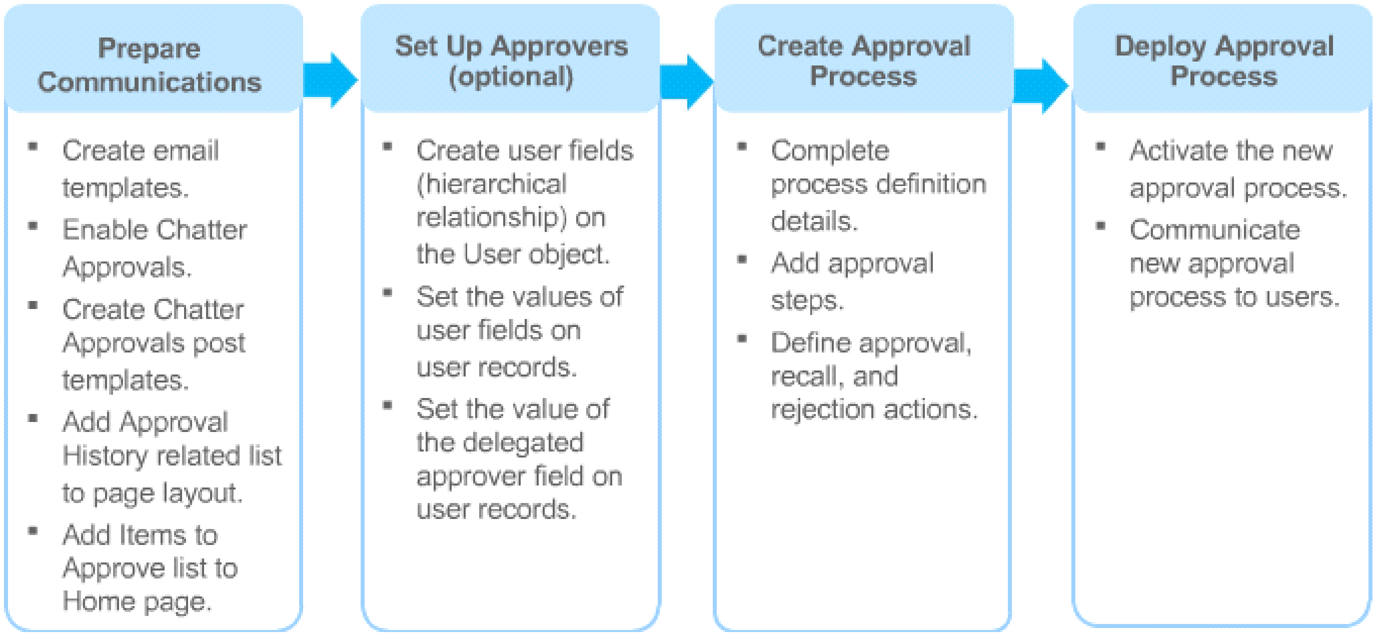
Wednesday, October 14, 2015 3:14 PM

Use approval processes to streamline requests.
Troubleshoot issues from approval processes.



When designing an approval process, you need to ask certain questions to ensure that the process meets the needs of the organization.

1. Who should be able to submit records?
2. Which records should enter this process?
3. What settings should apply to the whole process?
4. What should happen when a record is submitted for approval?
5. Who should records be routed to?
6. What should happen when an approver accepts or rejects a record?
7. What should happen if a record is approved, recalled, or rejected??



Preparing Communications

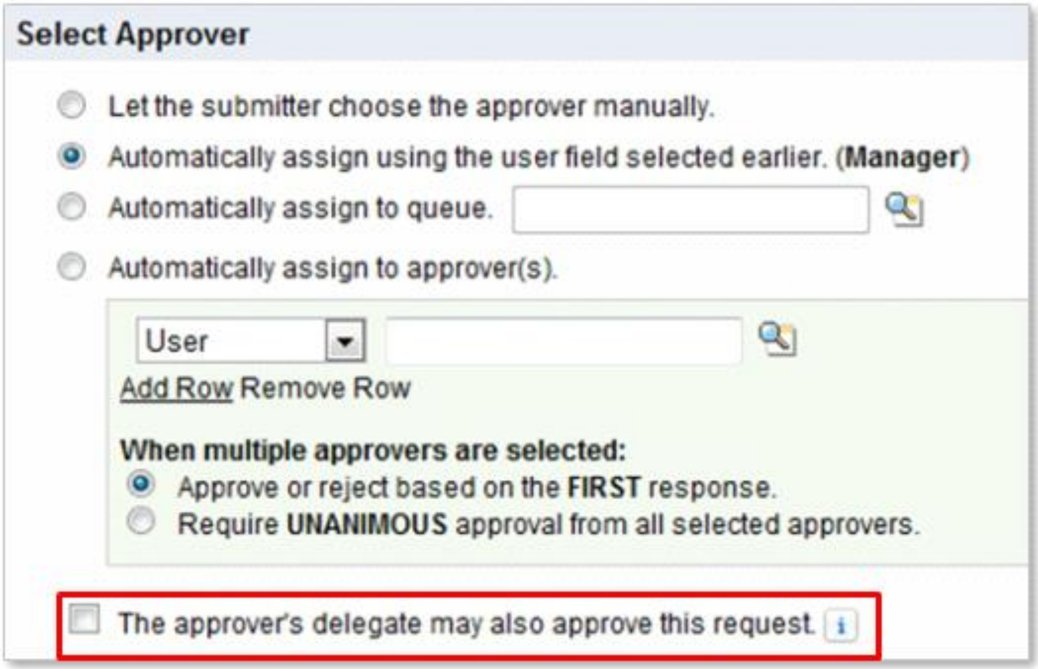
Email Templates: Setup -> Communication Templates -> Email Templates

Chatter Post Templates: Setup -> Create -> Workflow & Approvals -> Post Templates

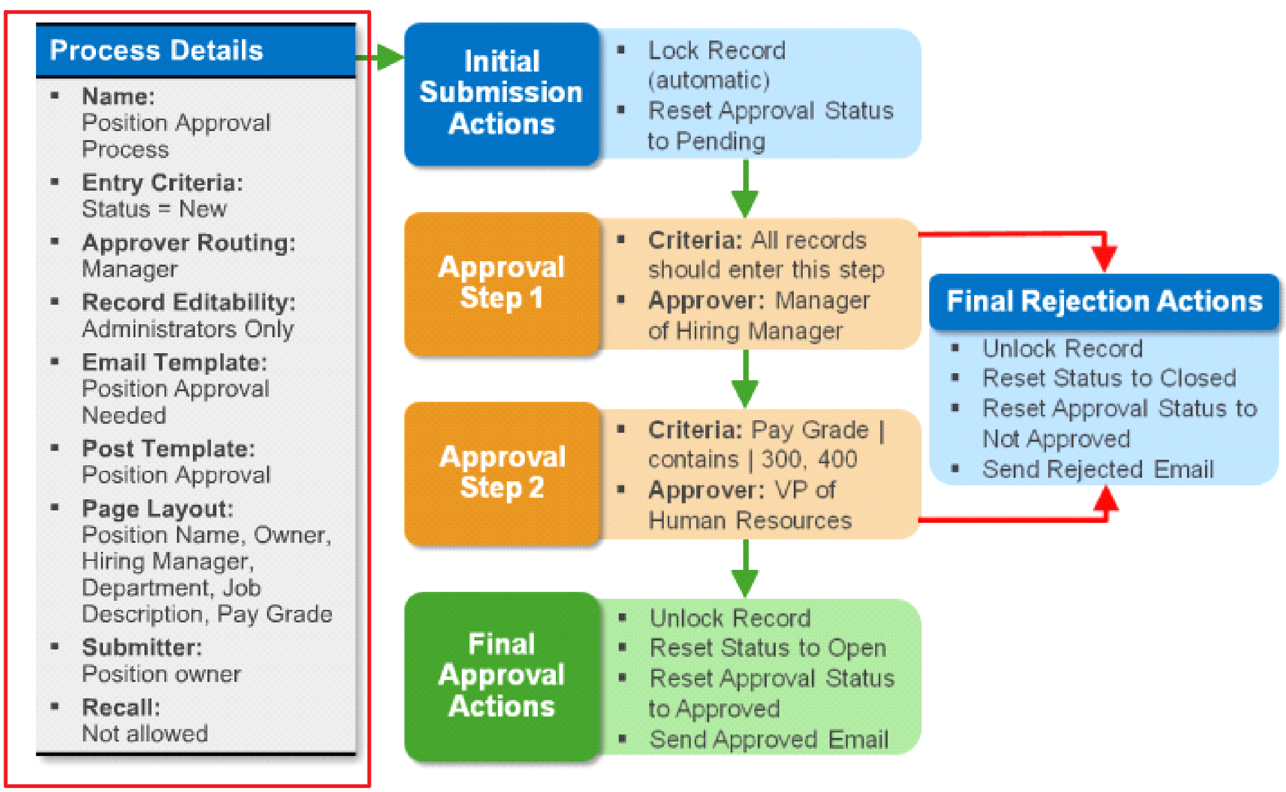
Add approval history to page layout: Setup -> Customize -> Home -> Home Page Layouts
Navigate to 'Select Wide Components to Show' and check 'Items to Approve'

Set up additional user fields to use as Approvers

Select Field Used for Automated Approver Determined By	Allows you to set the next automated approver to be determined by the Manager field of the record owner or a selected group on the hierarchical relationship
Use Approver Field of Position Owner	Select field.



Creating Approval Processes
Setup -> Create -> Workflow & Approvals -> Approval Processes



Manage Approval Processes for: **Object_Name**

Create New Approval Process using

1. Use Jump Start Wizard - simple one-step approval process in just a few clicks.
2. Use Standard Setup Wizard - multi-step process
    a. New name, unique name (auto-generated), and description.
    b. Specify Entry Criteria - only new records can enter the approval process. Field, operator, value
    c. Select Field Used for Automated Approval Routing
        i. Next Automated Approver Determined By: **Field_Name**
        ii. Use Approver Field of Position Owner
        iii. By default, admins ONLY can edit records during the approval process.
    d. Select a notification template that you've already built.
    e. Select the fields to display on the Approval Page layout.
        i. Choose whether or not to display the approval history information in the approval page layout.
        ii. Choose whether or not approvers can access the approval page only from within the Salesforce application.
    f. Specify Initial Submitters: Specifies which users can submit records for approval. By default, only Admins are allowed to recall approval requests. Choices are:
        i. Record Creator
        ii. Record Owner
        iii. Public Groups
        iv. Roles
        v. Roles and Subordinates
        vi. Users
    g. It is good practice to select "No, I'll do this later; take me to the approval process detail page to review what I've just created."
    h. Add a new "Initial Submission"
        i. Create a new name for the Field Update Edit.
        ii. Set Field to Update
        iii. Specify New Field Value: A specific value set to pending

Create Approval Steps

1. Start from the Approval Process Detail page.
2. New Approval Step
    a. Enter Name, Description, and Step Number
    b. Specify Step Criteria: either have all records enter the step, or set criteria (Field, operator, value).
    c. Select Assigned Approver:
        i. Let the submitter choose the approver manually
        ii. Automatically assign using the user field selected earlier. (Manager)
        iii. Automatically assign to a specified queue.
        iv. Automatically assign to approver(s)
        v. Specify whether or not the approver's delegate may also approve this request.
        vi. Denote Rejection Behavior.
    d. Specify whether you'd like to create a new approval action for this step now, a new rejection action for this step now, or choose to do that later.
3. Back on the approval process detail page, you can create approval and rejection actions by clicking "Show Actions" and selecting "Add New".

Create Final Approval Actions

1. Start from the Approval Process Detail page.
2. Edit Record Locking behavior
    a. Unlock the record for editing once it has been approved.
3. Add new final approval action (task, email alert, field update, or outbound message)

Create Final Rejection Actions

1. Start from the Approval Process Detail page.
2. Edit Record Locking behavior
   a. Unlock the record for editing once it has been approved.
3. Add new final rejection action (task, email alert, field update, or outbound message)

Deploy the Approval Process

1. Start from the Approval Process Detail page.
2. "View Diagram" to check process flowchart (Process Visualizer).
   a. Hover over a step to view details of the step.
   b. Expand approval actions.
   c. Printable view displays the flowchart and a table that summarizes each step in the process.
3. Select the "Activate" button.
4. Communicate to Users approval process is now available to users.
5. Remind users that they must click "Submit for Approval" to enter records into the process.
6. Test the Process.

What if you're having issues receiving notification?

1. Check the Email Log: Setup -> Log -> Email Log Files
2. View Approval History related list to confirm "Submit for Approval" was clicked
3. Enable Chatter approvals to easily track approval processes.
   a. Check the 'Allow Approvals' box from the Chatter feed

What if you're having trouble submitting records?

1. Check approval history related list on change request records to confirm that the list is empty
2. Post to Chatter reminding users that they must click "Submit for Approval".
3. Consider using an Apex trigger to automatically submit records for approval.
   a. Consider if automating record submission will result in change requests being submitted before the record contains all needed information.

What if you're approval process is stuck?

1. Check the Approval History related list.
   a. Send reminders to users who need to approve/reject requests.
2. Run the "All Pending Approval Requests" standard report from the **Administrative Reports** folder to view pending approval requests.
3. Use the Mass Transfer Approval Processes feature to view and transfer pending approval requests.
   a. Setup -> Data Management -> Mass Transfer Approval Request.
   b. Add a filter: Criteria, operator, value
   c. Mass transfer outstanding approval requests to a new user: **Select_User**.
   d. Select the records that are stuck in the approval process. Click **Transfer.**
      i. **Note:** This tool can also be used to mass remove records from an approval process.
4. Consider using delegated approvers to avoid future delays.
   a. When approver is unable to approve or reject the request, this is helpful.
5. Consider enabling email approval response to allow users to approve or reject a request by responding to the email.
   a. Allows users to reply to approval request email with APPROVE or REJECT in the email body.
   b. In second line of response, Users can also add comments.