

Development: Implementing Business Processes

Lesson 15: Automating Processes with Approval Process

salesforce

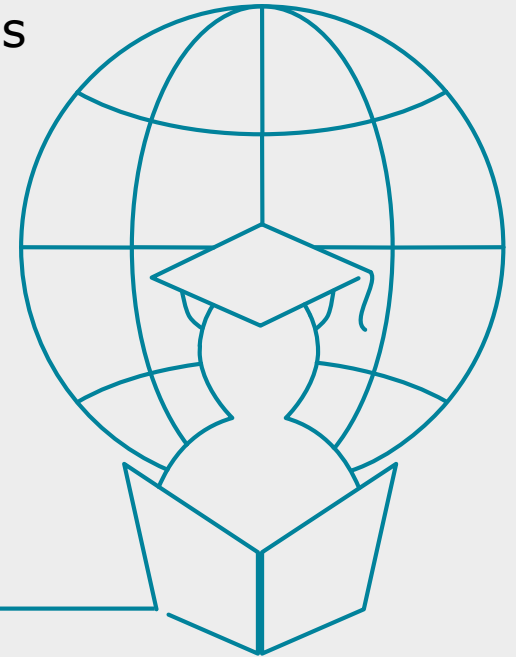
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Lesson Objectives

By the end of this lesson, you will be able to :

- List the components of a multi step approval process
- Implement a 3-step approval process
- Implement a 3-step approval process with an optional step in the middle (skip a step)
- Create an approval process with parallel approvals
- Create an outbound message as a part of an approval process
- View debug log
- Configure debug log to set category and level

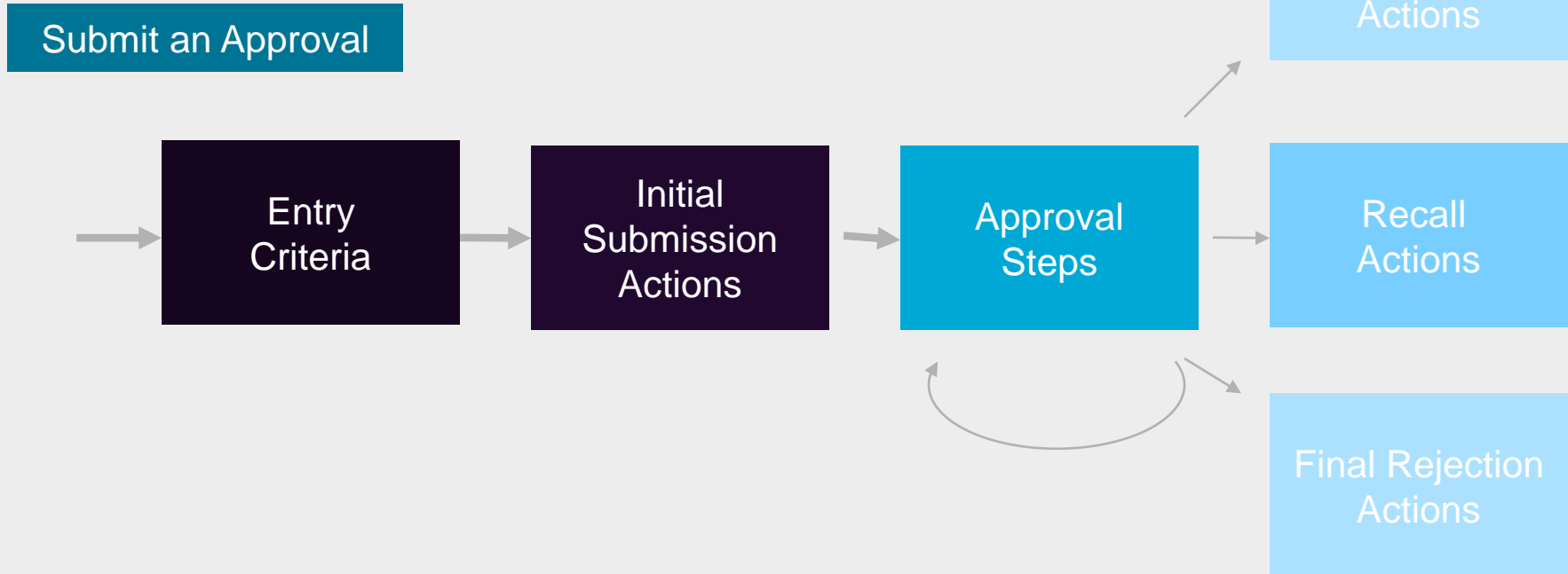


15.1: Multistep Approval Processes

Approval Processes

Approval processes are single or multistep processes that

Require end user authorization for record promotion



15.1: Multistep Approval Processes

How to define an Approval Process?

Process Definition

Which records should enter this process?
What settings should apply to the whole process?

Initial Submission Actions What happens when a record is submitted for approval?	Step Definition Who should records be routed to?	Final Rejection Actions What happens when a record is rejected?	Final Approval Actions What happens when a record is approved?	Recall Actions What happens when a record is recalled from the process?
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15.1: Multistep Approval Processes Process Visualizer

Approval Processes

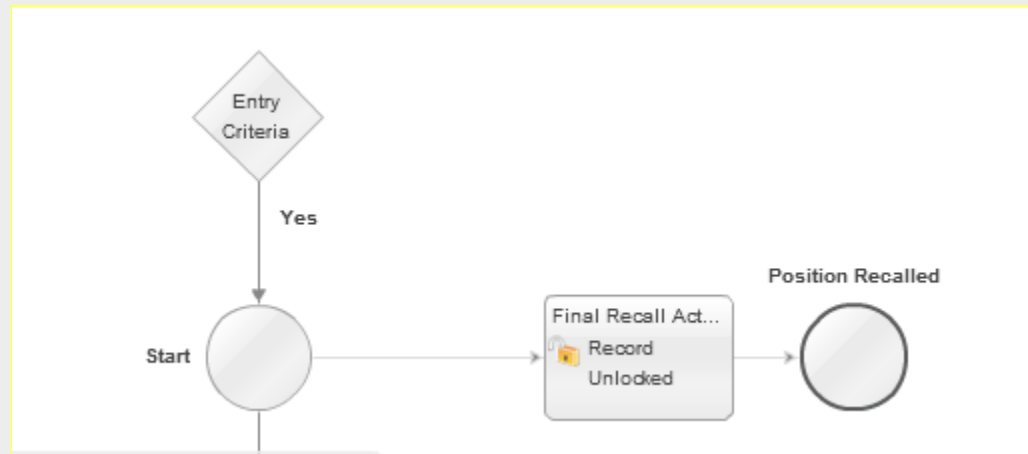
Position: Position Approval

[« Back to Approval Process List](#)

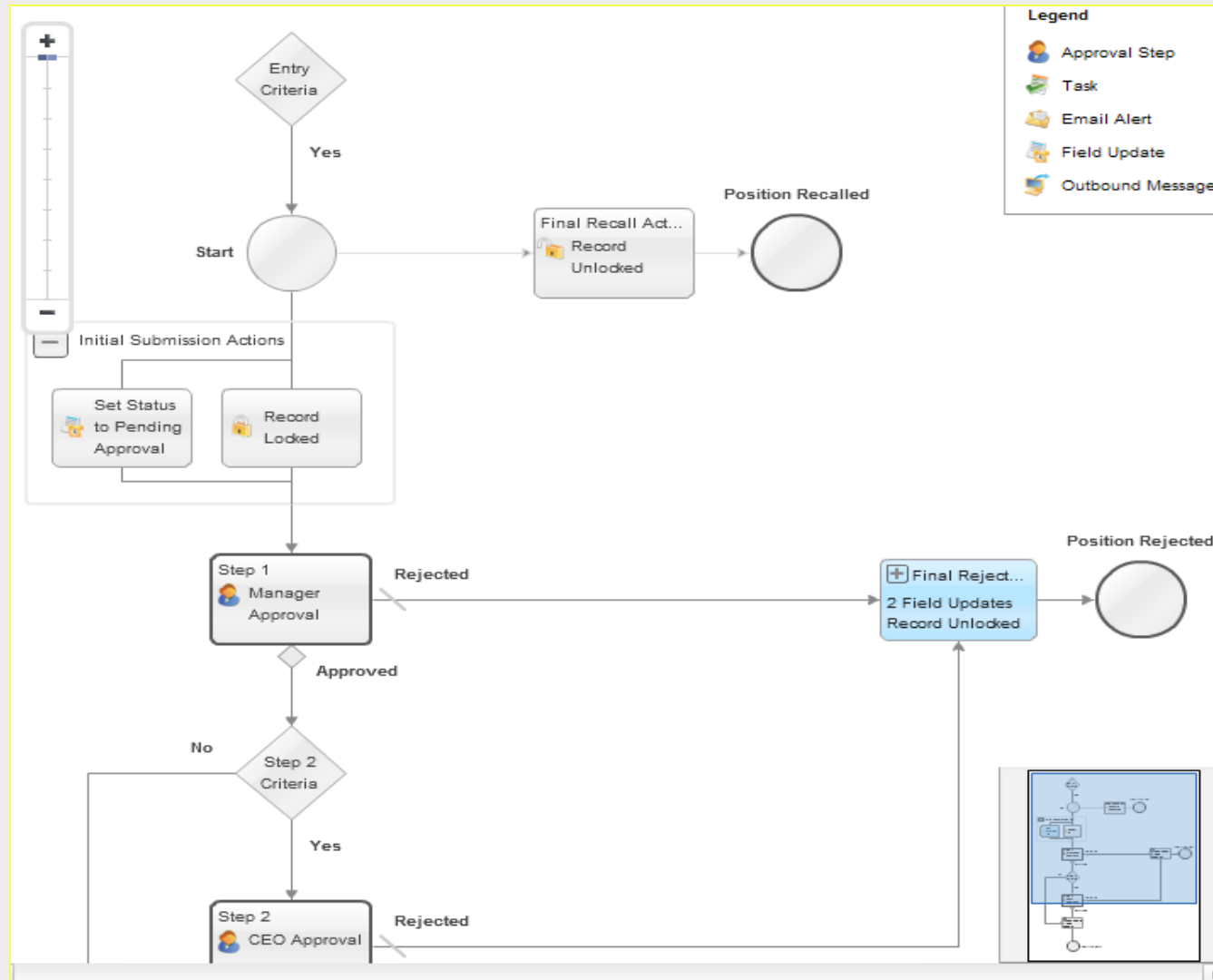
Process Definition Detail

Edit ▼ Clone Delete Activate View Diagram

Provide a visual
representation (read-only)
of your approval process
Hover over or expand steps
to see details



15.1: Multistep Approval Processes Process Visualizer



15.1: Multistep Approval Processes

Let's Compare.. Workflow rules and approval Processes

Workflow Rules

- Are triggered upon save
- Consist of one set of criteria and actions
- Can be modified or deleted

Approval Processes

- Are triggered only when a user clicks "submit for approval"
- Consist of multiple steps
- Have entry criteria, step criteria, and step actions
- Have initial submission actions for each step
- Have some attributes that can't be modified (process must be deactivated before they can be deleted)

Workflow rules and Approval Processes can be used together.

15.2: Skipping Steps in Approval Processes

Skipping Steps

A skip step is a step that has criteria defined to determine whether or not this approval is required

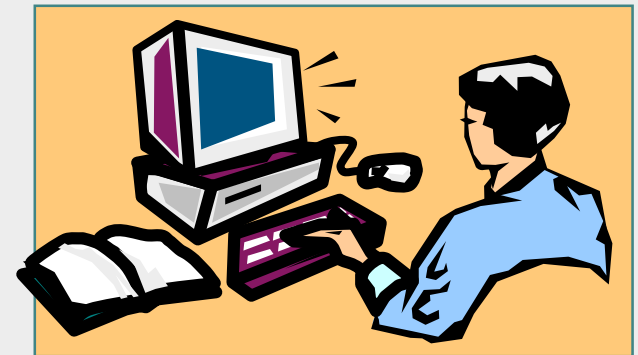
In the processes that have steps that are optional depending on criteria, use the skip step feature

To skip steps, use filter criteria or formula, then choose what should happen to records that do not meet the criteria. The options are:

- Approve Record (approves the request and performs all final approval actions)
- Go to next step (skips this step and goes to the next step)

Demo

Creating multistep approval process
Creating approval processes that skip steps



15.3: Approval Processes with Parallel Approvers?

What are Parallel Approvers?

Parallel approval processes allow a record to be sent for approval to up to 25 different users simultaneously

When setting up the process, developers choose the approvers, as well as whether the record requires unanimous approval or whether the record should be approved/rejected based on the first response

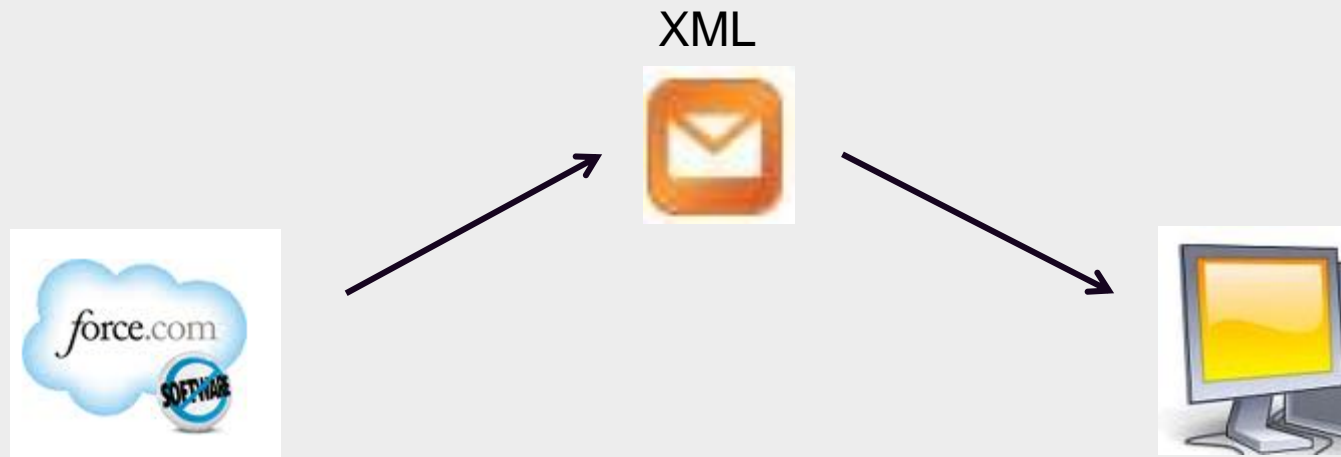
15.4: Keeping Systems in Sync with Outbound Messaging

What is outbound Messaging?

Outbound messages send the information you specify to an endpoint you designate

Workflow rules and approval processes can send outbound messages to an endpoint as a means of getting information to an external service

The message is a secure configurable API message (in SOAP/XML format)



15.5: Keeping Your Process Flexible with Dynamic Approval Routing

What is Dynamic Approval Routing?

Dynamic approval routing routes approval requests to users listed in lookup fields on the record requiring approval

Dynamic approval routing allows records to be routed based on complex approval

15.5: Keeping Your Process Flexible with Dynamic Approval Routing

Steps to Create a Dynamic Approval Process:

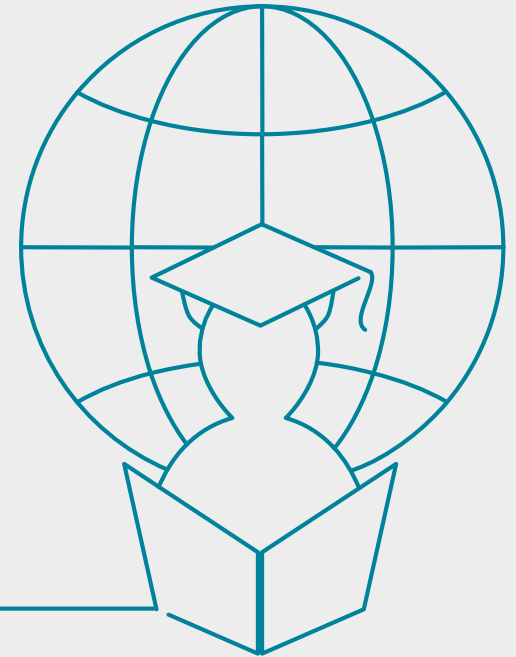
1. Create lookup fields on the object being approved.
2. Create a custom object as an approval matrix.
3. Populate the approval matrix.
4. Create Force.com code to fill in the lookup fields from the approval
5. Create or update an approval process to utilize the new lookup fields

15.5: Keeping Your Process Flexible with Dynamic Approval Routing Automated Processing Order

Automated processes occur in the following order:

1. Validation Rules
2. Assignment Rules
3. Auto-Response Rules
4. Workflow Rules (with immediate actions)
5. Escalation Rules

Approval Processes
Workflow rules and approval Processes
Skipping Steps
Parallel Approval process



What are the components of a multi – step approval process?

When approval processes have parallel approvals, what setting must developers select?

What is an Outbound Message? In what format is it sent?