

# Enhanced Approval Requests Pro

## Release Notes

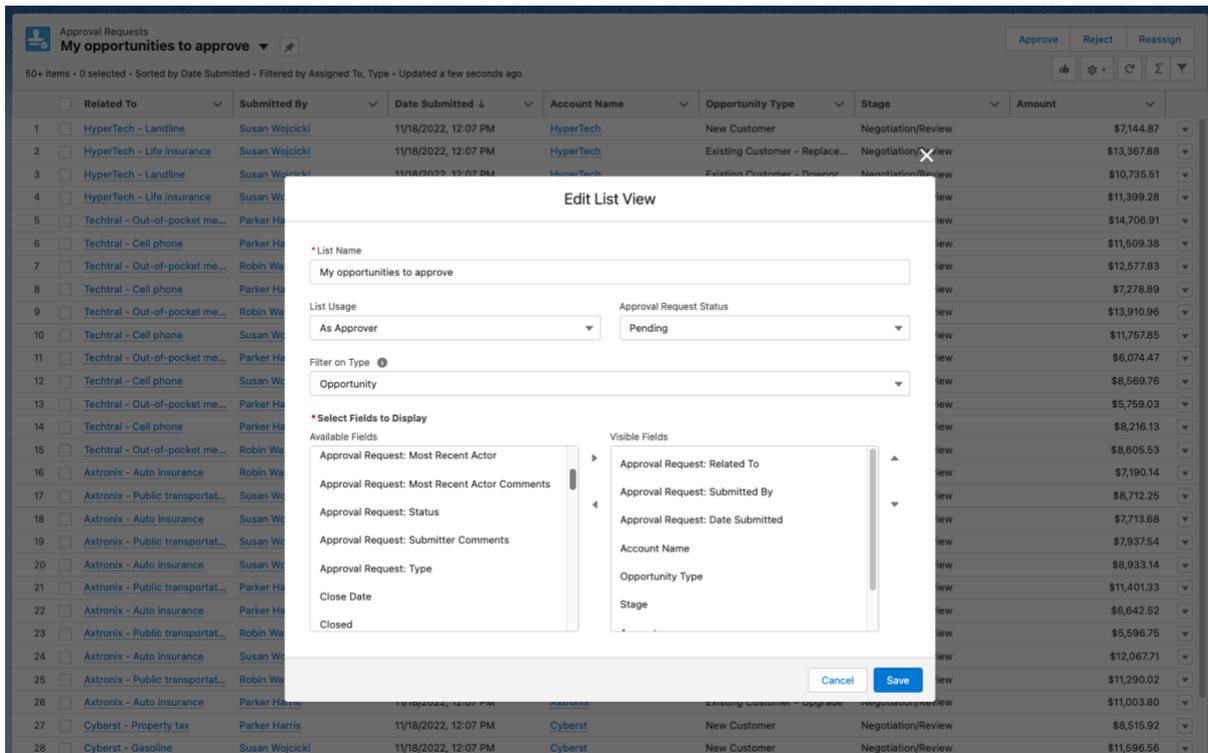
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## 1 Users can create their own list views

The type of information an approver needs to determine whether requests should be approved or rejected could be different for each individual approver and situation. Formerly only administrators were able to create public approval list views, for all users or a group of users, via Custom Metadata Types in the Setup. This is still possible. However, as of now, each user – approver or submitter – can also create and edit their own approval list views via the UI, by using the List View Controls on the Approval Requests desktop page.



A user has the possibility to create a list view from an approver’s perspective or from a submitter’s perspective, by selecting “As Approver” or “As Submitter” under List Usage. In case of Approver usage, the list shows items assigned to the user; in case of Submitter usage, it shows items submitted by the user.

A user can choose a filter on approval requests status (e.g., pending, approved, or rejected) and filter on a specific type, i.e., the object of which an approval request is related to. In that case, the user has the possibility to also include fields from this object.

Note: a list view created via the UI is only visible for the user who created it. So, a user can create as many list views as needed, without bothering other users with those list views.

## 2 “Any User” quick filter option available to more users

Next to the administrator, any approver or submitter who has the “View All Data” system permission can now use the Assigned To or Submitted By “Any User” option under Quick Filters. To actually process (approve, reject, reassign, recall) a request that is not assigned to (or submitted by) the user, the user needs the “Modify All Data” system permission.

**Assigned To** ▼
**Quick Filters** ⓘ
✕

- Parker Harris ▼
- Parker Harris ▼
- Marc Benioff ▼
- Marc Benioff ▼
- Marc Benioff ▼

**Assigned To**

Me

My Queues

Users for whom I am the Delegated

**Approver**

Any User

### 3 Adjust the maximum number of items for bulk processing

By default, users can select up to 200 approval requests for mass approval, rejection, or reassignment. However, in some scenario's you might want to increase or limit the maximum number of approval requests that can be processed in one go. Be cautious with increasing this number, as it could lead to governor limit issues (especially if there's a lot of automation behind your approval processes).

▼ **Other Settings**

Hide Reassign Action 
Maximum Items Selectable

Approval Requests										
Expenses to Approve										
50+ items • 20 selected • Sorted by Date Submitted • Filtered by Assigned To, Type • Updated a few seconds ago										
<input checked="" type="checkbox"/>	Related To	Submitte...	Date Su...	Submitter...	Assigned To	Amount	Amount In...	VAT Included	Account	Email
<input checked="" type="checkbox"/>	Alimony payme...	Marc Benioff	09/14/2022, 0...	Please approve.	Expense Appro...	\$568.17		✓	EngineerGear	info@engin...
<input checked="" type="checkbox"/>	Alimony payme...	Marc Benioff	09/14/2022, 0...	Please approve.	Expense Appro...	\$688.28		✓	EngineerGear	info@engin...
<input checked="" type="checkbox"/>	Gasoline	Parker Harris	09/14/2022, 0...	Can you have a...	Expense Appro...	\$987.38		✓	Axtronix	info@axtron...
<input checked="" type="checkbox"/>	Car payment	Parker Harris	09/14/2022, 0...	Can you appro...	Expense Appro...	\$1,110.65		✓	Cyberst	info@cyber...
<input checked="" type="checkbox"/>	Other essentials	Robin Washing...	09/14/2022, 0...	Can you appro...	Expense Appro...	\$650.68		✓	MetaTech	info@metat...
<input checked="" type="checkbox"/>	Toiletries	Robin Washing...	09/14/2022, 0...	Can you appro...	Expense Appro...	\$634.83		✓	TechZao	info@techz...
<input checked="" type="checkbox"/>	Groceries	Susan Wojcicki	09/14/2022, 0...	Please approve.	Expense Appro...	\$932.47		✓	Sample Accou...	info@sampl...
<input checked="" type="checkbox"/>	Garbage	Robin Washing...	09/14/2022, 0...	I need approval...	Expense Appro...	\$383.49		✓	Techetit	info@teche...
<input checked="" type="checkbox"/>	Sanitation	Susan Wojcicki	09/14/2022, 0...	I uregntly need...	Expense Appro...	\$631.37		✓	EngineerGear	info@engin...
<input checked="" type="checkbox"/>	Water	Robin Washing...	09/14/2022, 0...	Please approve.	Expense Appro...	\$914.56		✓	Opticallocal	info@optica...
<input checked="" type="checkbox"/>	Natural gas	Robin Washing...	09/14/2022, 0...	I uregntly need...	Expense Appro...	\$647.52		✓	EssecSec	info@essec...
<input checked="" type="checkbox"/>	Electricity	Robin Washing...	09/14/2022, 0...	I uregntly need...	Expense Appro...	\$1,192.87		✓	QuitmanSabon	info@quitm...
<input checked="" type="checkbox"/>	Life insurance	Robin Washing...	09/14/2022, 0...	Do you have so...	Expense Appro...	\$1,427.06		✓	TechCity	info@techci...
<input checked="" type="checkbox"/>	Out-of-pocket ...	Robin Washing...	09/14/2022, 0...	I uregntly need...	Expense Appro...	\$192.87		✓	TechRich	info@techri...
<input checked="" type="checkbox"/>	Health insurance	Susan Wojcicki	09/14/2022, 0...	Can you have a...	Expense Appro...	\$481.04		✓	HyperTech	info@hyper...
<input checked="" type="checkbox"/>	Auto insurance	Susan Wojcicki	09/14/2022, 0...	Please approve.	Expense Appro...	\$1,099.19		✓	Techtral	info@techtr...
<input checked="" type="checkbox"/>	Property tax	Robin Washing...	09/14/2022, 0...	Please have a l...	Expense Appro...	\$787.27		✓	Axtronix	info@axtron...
<input checked="" type="checkbox"/>	Renters insura...	Parker Harris	09/14/2022, 0...	Please have a l...	Expense Appro...	\$198.90		✓	Cyberst	info@cyber...
<input checked="" type="checkbox"/>	Homeowners	Susan Wojcicki	09/14/2022, 0...	I need approval...	Expense Appro...	\$556.15		✓	MetaTech	info@metat...
<input checked="" type="checkbox"/>	Rent	Susan Wojcicki	09/14/2022, 0...	Please approve.	Expense Appro...	\$716.53		✓	TechZao	info@techz...
<input type="checkbox"/>	Mortgage	Parker Harris	09/14/2022, 0...	Please have a l...	Expense Appro...	\$324.48		✓	Sample Accou...	info@sampl...
<input type="checkbox"/>	Child care	Susan Wojcicki	09/14/2022, 0...	Do you have so...	Expense Appro...	\$304.10		✓	Techetit	info@teche...
<input type="checkbox"/>	Alimony payme...	Robin Washing...	09/14/2022, 0...	Do you have so...	Expense Appro...	\$273.08		✓	EngineerGear	info@engin...
<input type="checkbox"/>	Child support	Susan Wojcicki	09/14/2022, 0...	Please have a l...	Expense Appro...	\$108.73		✓	Opticallocal	info@optica...
<input type="checkbox"/>	Other minimu...	Susan Wojcicki	09/14/2022, 0...	Do you have so...	Expense Appro...	\$875.97		✓	EssecSec	info@essec...

#### 4 Select approver upon mass submit for approval

It could be that some of your approval processes require a submitter to manually choose an approver upon submission of records for approval.

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
<a href="#">Show Actions</a>   <a href="#">Edit</a>	1	Step 1			Manually Chosen	Final Rejection

Previously, it wasn't possible to mass submit records in case of such an approval process. As of now, the mass submit controller automatically checks if one or more of the submitted records require an approver to be selected manually. If so, the submitter can select the desired approver via a user lookup field. Submitting multiple records in one go for approval is now possible for every type of approval process!

Submit 50 out of 50 Expenses for Approval

✔ Able to submit 50 out of 50 Expenses. Manually select an approver for 50 Expenses.

Comments

Can you please approve these expenses?

\* Approver (click on the magnifying glass to select a user)

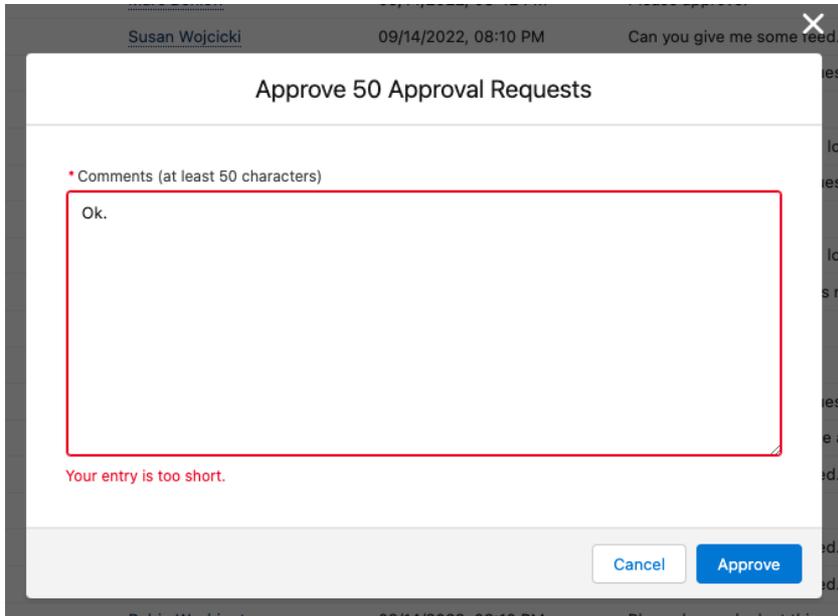
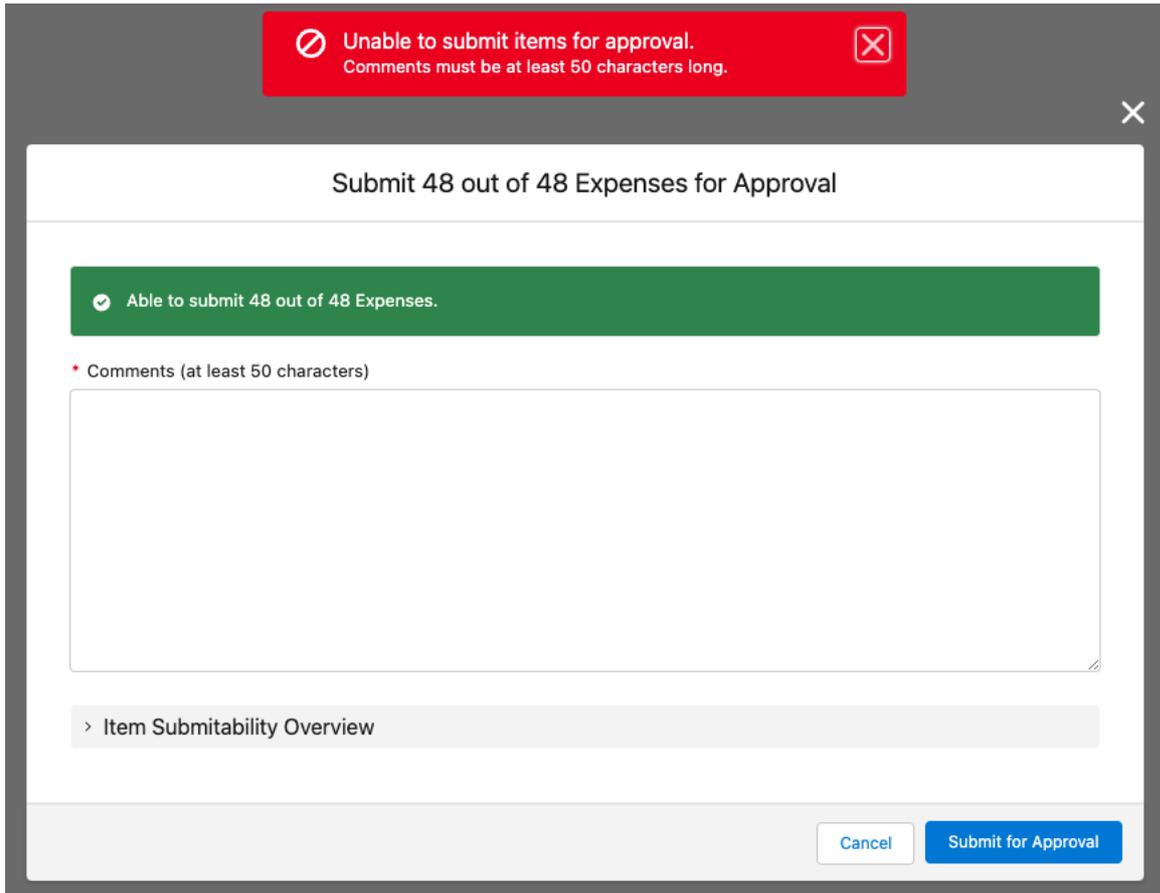
Marc Benioff
🔍

> Item Submitability Overview

Cancel Submit for Approval

#### 5 Make submit and approval comments mandatory

Would you like to make sure that users always provide comments when they submit multiple records for approval? Or that approval managers always provide a reason for approving or rejecting multiple approval requests? This is now possible. As an admin, you can configure for which type of mass actions (submit, recall, approve, reject) it is mandatory to provide comments. You can also specify the minimum number of characters. This way you make sure approval managers always have sufficient information to do their work properly!



This can be configured via the “EAR – General Settings” custom metadata. See chapter 8 of the [installation guide](#) for detailed instructions.

Comments Related Settings	
Minimum Required Characters For Comments	<input type="text" value="50"/>
Comments Required On Submit	<input checked="" type="checkbox"/>
Comments Required On Reject	<input checked="" type="checkbox"/>
Comments Required On Approve	<input checked="" type="checkbox"/>
Comments Required On Recall	<input checked="" type="checkbox"/>

## 6 Filter on Recalled approval requests

It's now possible to also filter on the status "Recalled". This allows users to easily view any approval requests they ever recalled after submission.

Approval Requests  
**All My Expense Requests** Recall

3 items • 0 selected • Filtered by Type, Status • Updated a minute ago

<input type="checkbox"/>	Related To	Type	Date Most ...	Status	Categories	Amount	Discount
<input type="checkbox"/>	Sanitation	Expense	09/14/2022, 09:...	Recalled	Travel	\$1,151.96	0.00%
<input type="checkbox"/>	Groceries	Expense	09/14/2022, 09:...	Recalled	Advertising; Car...	\$880.56	0.00%
<input type="checkbox"/>	Garbage	Expense	09/14/2022, 09:...	Recalled	Advertising; Util...	\$1,084.59	0.00%

**Quick Filters**

Submitted By  
 Any User

Related To

Type  
Expense

Status  
Available: Approved, Rejected, Pending  
Selections: Recalled

If preferred, you can also create a specific list view for recalled approval requests.

**EAR - List View Edit** Save Save & New Cancel

**Information**

Label:  EAR - List View Name:  i

Custom Label for Translated Title:

Is Active:

**Filters**

Filter On Perspective:  Include Items Assigned Directly

Filter On Approval Status:  Include Items Assigned Via Queues

Filter On Type:  Include Items As Delegated Approver

Filter On Approval Process Name:

Approval Requests  
**My Recalled Items**

3 items • 0 selected • Filtered by Type, Status • Updated a minute ago

<input type="checkbox"/>	Related To	Type	Date Most Rece...	Status	Categories	Amount	Discount
<input type="checkbox"/>	Sanitation	Expense	09/14/2022, 09:29 PM	Recalled	Travel	\$1,151.96	0.00%
<input type="checkbox"/>	Groceries	Expense	09/14/2022, 09:29 PM	Recalled	Advertising; Car & Tru...	\$880.56	0.00%
<input type="checkbox"/>	Garbage	Expense	09/14/2022, 09:29 PM	Recalled	Advertising; Utilities	\$1,084.59	0.00%