

Enhanced Approval Requests Pro

Release Notes

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1 Make list views visible only to specific users

Your organization may have several approval processes across multiple departments, which made you decide to create several Approval Requests list views. Until today, these list views were automatically visible to all your licensed users. Fortunately, it is now possible to assign a Public Group to your list views, making the list view visible only to the users who are part of that group. For this, you can leverage standard user groups, roles and/or “roles and subordinates”. Now your users will not see an overcrowded list of all list views anymore, but only those that are useful to them.

The screenshot shows the 'Custom Metadata Types' setup page in Salesforce. The main heading is 'EAR - List View'. Below it, there are buttons for 'Edit', 'Delete', and 'Clone'. The configuration table is as follows:

Label	Expenses to Approve	EAR - List View Name	Expenses_to_Approve
Custom Label for Translated Title		Is Active	<input checked="" type="checkbox"/>

Below the table, there are sections for 'Filters', 'Column Visibility and Order', 'List View Visibility' (highlighted with a red box), 'Other Settings', and 'System Information'. The 'List View Visibility' section shows 'Public Group' set to 'Finance'. At the bottom, there are 'Edit', 'Delete', and 'Clone' buttons.

The screenshot shows the 'Approval Requests' page with the 'Expenses to Approve' list view selected. A dropdown menu is open, showing the following options:

- LIST VIEWS
- Expenses to Approve
- Items to Approve

The background shows a table with columns for 'Submitted' and 'Filtered', and rows of data including 'Mortgage' and 'Robin Was...'.

Note: If you don't see the section “List View Visibility” with the field “Public Group” yet, please add the section and the field to the page layout of the “EAR – List View” Custom Metadata Type object. See the chapter “Configure list views” in the installation guide for more details.



2 Overall performance increase

We have implemented a solution to speed up the load time of approval request data and the mass approve, reject and reassign actions. Now your users can mass manage approval requests with the speed of lighting!