

Enhanced Approval Requests Installation Guide

Version 1.7, Spring 2021
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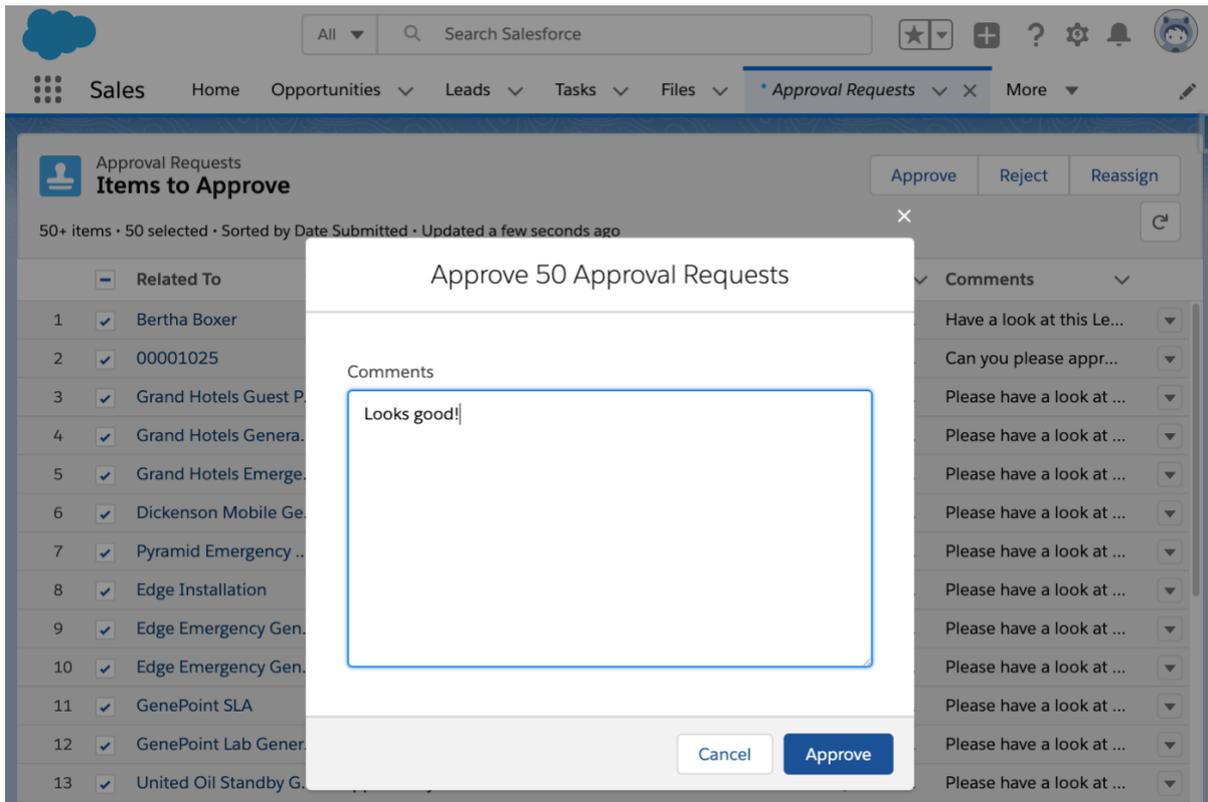


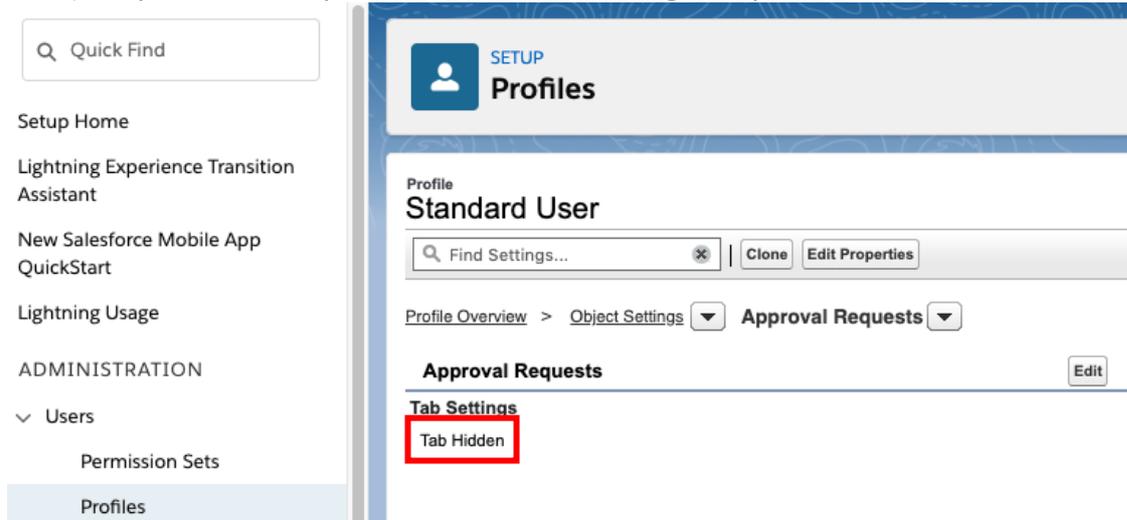
Table of Contents

1	<i>Hide standard Approval Requests tab</i>	2
2	<i>Install 'Enhanced Approval Requests' package</i>	2
3	<i>Assign 'Enhanced Approval Requests' permission set to users</i>	3
4	<i>Add 'Items to Approve (enhanced)' to home page(s)</i>	3
5	<i>Configure table and action features (optional)</i>	4

1 Hide standard Approval Requests tab

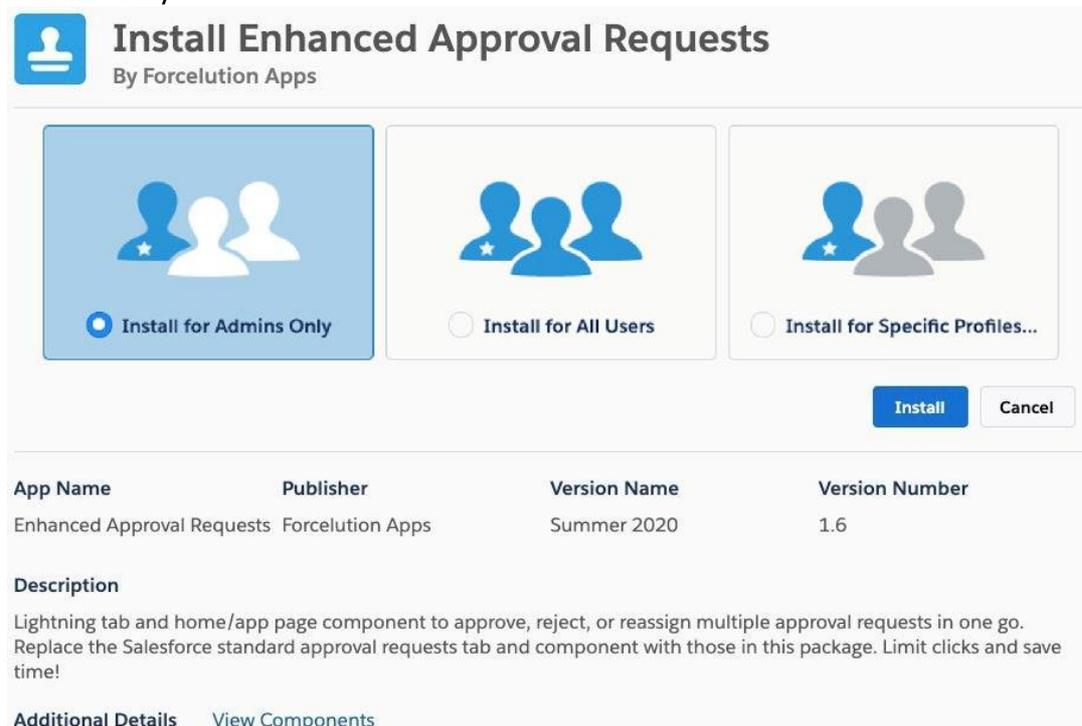
Before installing the Enhanced Approval Requests package, adjust the Tab Settings of the standard Approval Requests to 'Tab Hidden' for all applicable user profiles:

- 1) Go to Setup → Users → Profiles.
- 2) Click one of the concerning profiles.
- 3) Go to Object Settings → Approval Requests.
- 4) Click 'Edit'.
- 5) Select 'Tab Hidden' under 'Tab Settings'.
- 6) Click 'Save'.
- 7) Repeat these steps for the other concerning user profiles.



2 Install 'Enhanced Approval Requests' package

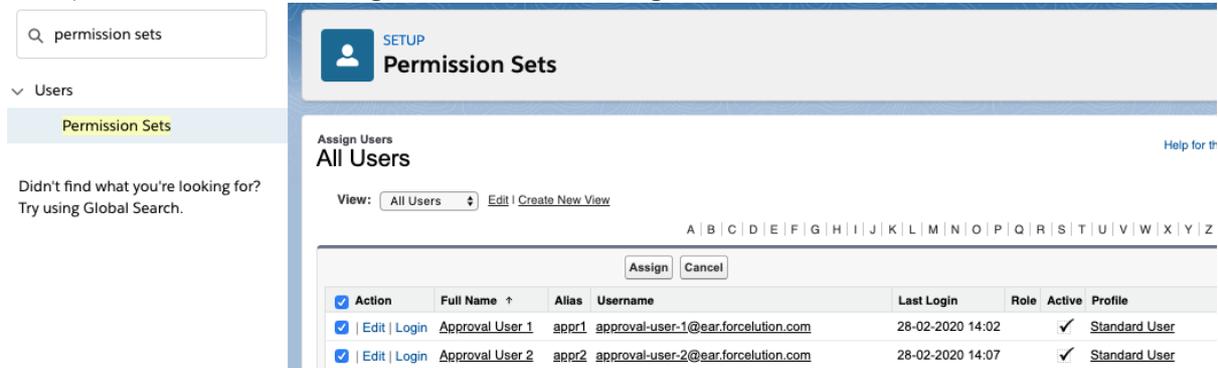
Install the Enhanced Approval Requests package from the AppExchange. Select 'Install for Admins Only'.



3 Assign 'Enhanced Approval Requests' permission set to users

The users that will be managing (approving, rejecting or reassigning) approval requests need to be assigned with the 'Enhanced Approval Requests' permission set:

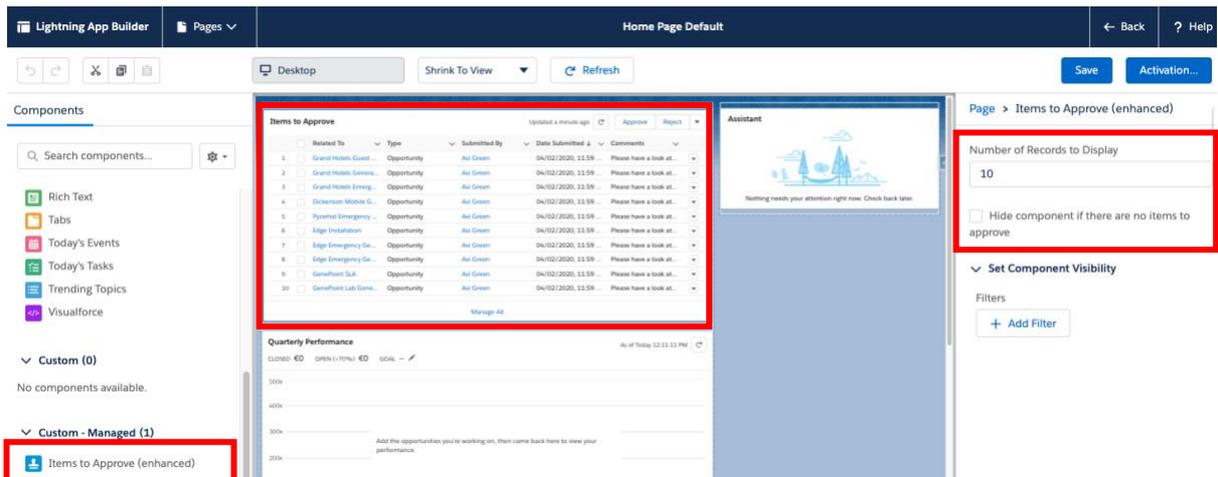
- 1) Go to Setup → Users → Permission Sets.
- 2) Click the 'Enhanced Approval Requests' permission set.
- 3) Click 'Manage Assignment'.
- 4) Select the concerning users and click 'Assign'.



4 Add 'Items to Approve (enhanced)' to home page(s)

Add the 'Items to Approve (enhanced)' Lightning component to the home page(s):

- 1) Go to the Home page in the concerning app.
- 2) Click 'Edit Page' under the gear-icon in the right-upper corner.
- 3) Remove the standard 'Items to Approve' component from the page (if it's still there).
- 4) Find 'Items to Approve (enhanced)' under 'Custom – Managed'.
- 5) Drag and drop the component to the desired location on the page.
- 6) Optionally, adjust the maximum number of items that will be shown in the component via the setting 'Number of Records to Display'.
- 7) Optionally, select "Hide component if there are no items to approve".

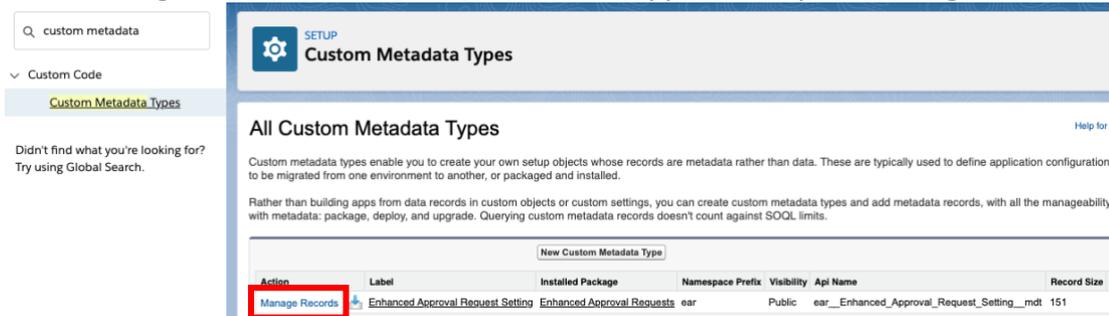


5 Configure table and action features (optional)

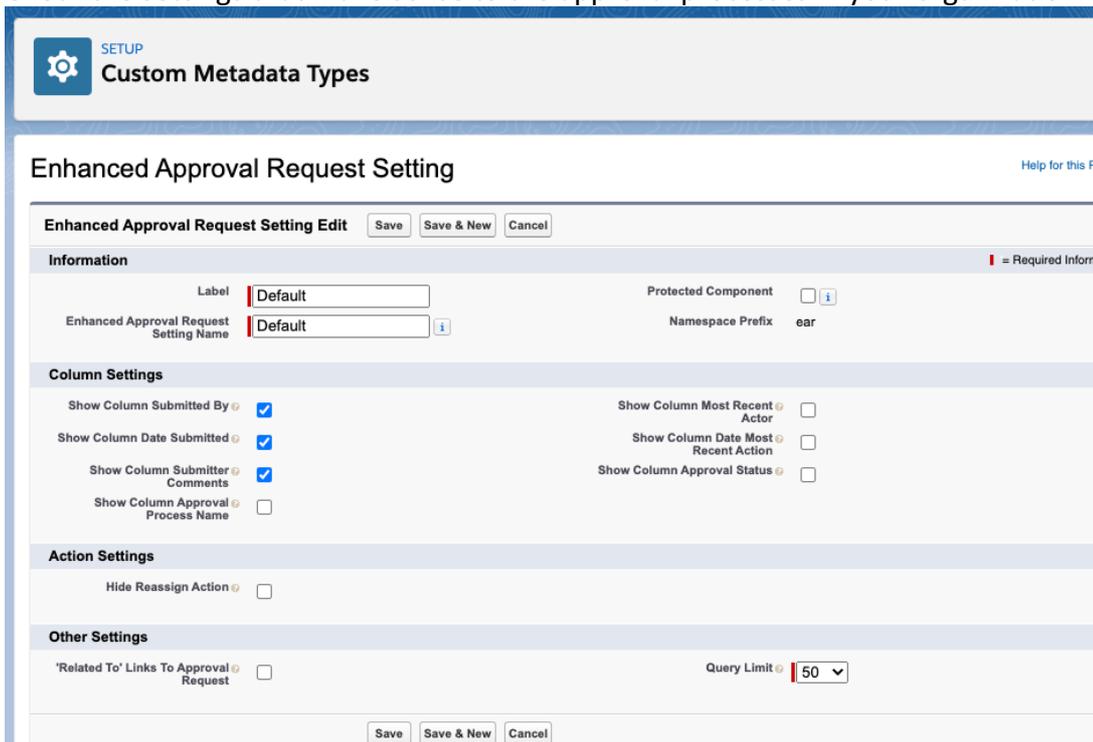
By default, after installation of the package, the Approval Requests table shows columns related to the submitter. It is possible to hide some of these columns and/or show additional columns, including *most recent actor/action* columns and a status (submitted or reassigned) column. Also, it is possible to hide the reassign action, which makes sense if users in your org should not be reassigning approval requests to other users.

These settings can be adjusted under Custom Metadata Types in the Setup:

- 1) Go to Setup → Custom Metadata Types.
- 2) Click 'Manage Records' to the left of 'Enhanced Approval Request Setting'.



- 3) Click 'Edit' to the left of 'Default'.
- 4) Check the settings that make sense to the approval processes in your organization.



- 5) Click 'Save'.

Note: if you had installed a previous version of the package and upgraded to version 1.4 (or above), not all of the settings might be visible on the Custom Metadata Type page layout yet. In order to add them, go back to Custom Metadata Types, click on 'Enhanced Approval Request Setting', scroll down to Page Layouts, and click 'Edit' to the left of 'Enhanced Approval Request Setting Layout'. Subsequently, add the fields and (optionally) the sections as shown in the image above.

Column and Action Settings

Enhanced Approval Request Setting Edit

Information

Label: Namespace Prefix: ear

Enhanced Approval Request Setting Name:

Column Settings

Show Column Submitted By: 1

Show Column Date Submitted: 2

Show Column Submitter Comments: 3

Show Column Most Recent Actor:

Show Column Date Most Recent Action:

Show Column Approval Status:

Action Settings

Hide Reassign Action: 4

Other Settings

Query Limit:

Buttons: Save, Save & New, Cancel

Related To	Type	Submitted By	Date Submitted	Submitter Comments
Bertha Boxer	Lead	Josh Davis	04/02/2020, 01:12 PM	Have a look at this Lead!
00001025	Case	Josh Davis	04/02/2020, 01:10 PM	Can you please approve this case?
Grand Hotels Guest Portable Genera...	Opportunity	Avi Green	04/02/2020, 11:59 AM	Please have a look at this opportunity.
Grand Hotels Generator Installations	Opportunity	Avi Green	04/02/2020, 11:59 AM	Please have a look at this opportunity.

Enhanced Approval Request Setting Edit

Information

Label: Namespace Prefix: ear

Enhanced Approval Request Setting Name:

Column Settings

Show Column Submitted By:

Show Column Date Submitted:

Show Column Submitter Comments: 1

Show Column Most Recent Actor: 2

Show Column Date Most Recent Action: 3

Show Column Approval Status: 4

Action Settings

Hide Reassign Action: 5

Other Settings

Query Limit:

Buttons: Save, Save & New, Cancel

Related To	Type	Most Recent Actor	Date Most Recent Action	Status	Submitter Comments
Bertha Boxer	Lead	Josh Davis	04/02/2020, 01:12 PM	Submitted	Have a look at this Lead!
00001025	Case	Josh Davis	05/08/2020, 04:52 PM	Reassigned	Can you please approve this c...
Grand Hotels Guest Portable ...	Opportunity	Avi Green	04/02/2020, 11:59 AM	Submitted	Please have a look at this opp...
Grand Hotels Generator Instal...	Opportunity	Avi Green	04/02/2020, 11:59 AM	Submitted	Please have a look at this opp...

'Related To' Links To Approval Request

By default, when a user clicks on the name of an approval request item in the 'Related To' column, the user will navigate to the record detail page of the target object. Alternatively, when *'Related To Links To Approval Request'* is checked, the user will navigate to the Approval Request work item page.

Query Limit

By default, when a user clicks on the Approval Requests tab, there are initially maximum 50 approval request items loaded. If the user scrolls down the page, the next batch of 50 items is loaded (if there are any). This can continue up to 2000 items.

It is possible to adjust the number of items that are loaded per batch. Please be aware that increasing this query limit might affect the performance (i.e. increasing the load time of items to approve). The query limit can be adjusted to 100, 150 or 200 items.