

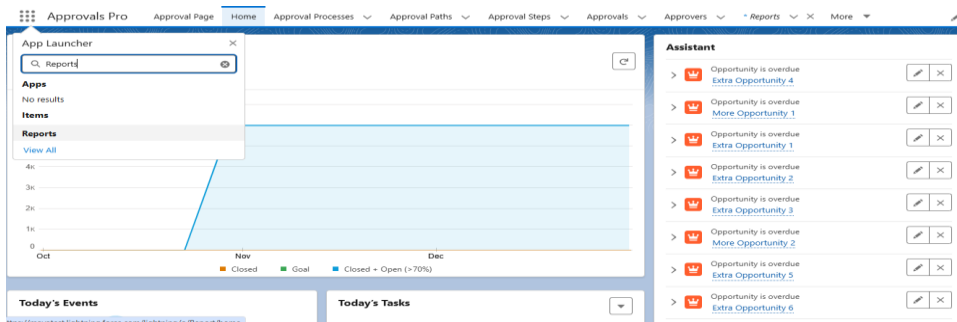


Quick Guide: Building Reports & Dashboards Based on Approvals Pro Data

In this quick guide, you will create reports that show pending approvals and the average time to approve requests. You will be completing this project in your sandbox environment.

Step 1: Creating the "Unapproved Steps Pending" Report

1. Click the App Launcher and choose "Reports."



2. Click "New Report."
3. Select "Approval Requests with Approvals" as the report type.
4. Add the following columns:
 - Approver
 - Date/Time Assigned
 - Summary Formula: `NOW() - appro__Approval__c.appro__Date_Time_assigned__c`

Note: The summary formula: `NOW() - appro__Approval__c.appro__Date_Time_assigned__c` calculates the number of days an approval request has been pending. This is essential for tracking efficiency and identifying delays in the approval process.

5. Validate and apply the formula

Approver	Date/Time Assigned	f_x Time Pending Approval
1 Amy Brown	1/27/2025, 4:18 AM	0.10
2 Steve Jobs	1/27/2025, 4:19 AM	0.10
3 Amy Brown	1/27/2025, 4:18 AM	0.10
4 Steve Jobs	1/24/2025, 2:32 PM	2.68
5 Pete Sampras	1/23/2025, 2:32 PM	3.68
6 Steve Jobs	1/19/2025, 2:32 PM	7.68
7 Steve Jobs	1/13/2025, 8:08 AM	13.94
8 Steve Jobs	1/13/2025, 8:08 AM	13.94
9 John Doe	1/13/2025, 8:08 AM	13.94
10 Steve Jobs	1/13/2025, 8:08 AM	13.94
11 John Doe	1/7/2025, 2:32 PM	19.68
12 Steve Jobs	1/7/2025, 2:32 PM	19.68
13		109.46 Avg: 9.12

6. Apply the following filters:

- Show me: All Approval Requests
- Approval Request Created Date: All Time
- Status: Equals Assigned

Why this filter? Filtering by "Status: Equals Assigned" ensures that only pending approval requests are considered, helping to focus on outstanding tasks.

Field	Operator	Value
Status	equals	Assigned

7. Save the report as "Unapproved Steps Pending."

Step 2: Creating the "Average Time to Approve" Report

1. Follow the same steps to start a new report.
2. Add the following fields:
 - Rows: Approval Step
 - Columns: Approval Request, Approval Name, Date/Time Assigned, Date/Time Approved
 - Summary Formula: `appro__Approval__c.appro__Date_Time_Approved__c - appro__Approval__c.appro__Date_Time_Assigned__c`

3. Summarize by Sum and Average.

Note: This formula calculates the total duration it takes to approve requests, helping to track efficiency

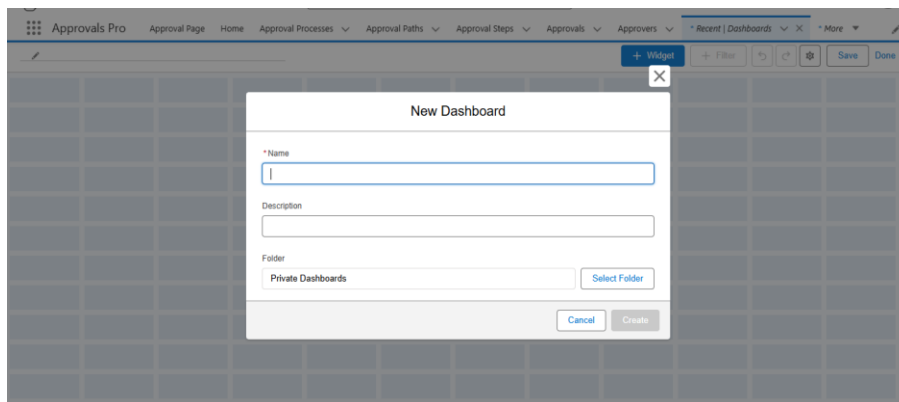
4. Apply filters:

- Show me: All Approval Requests
- Approval Request Created Date: All Time
- Date/Time Approved: Not Equal to blank
- Approval Steps

5. Save the report as "Avg Approval Time per Step."

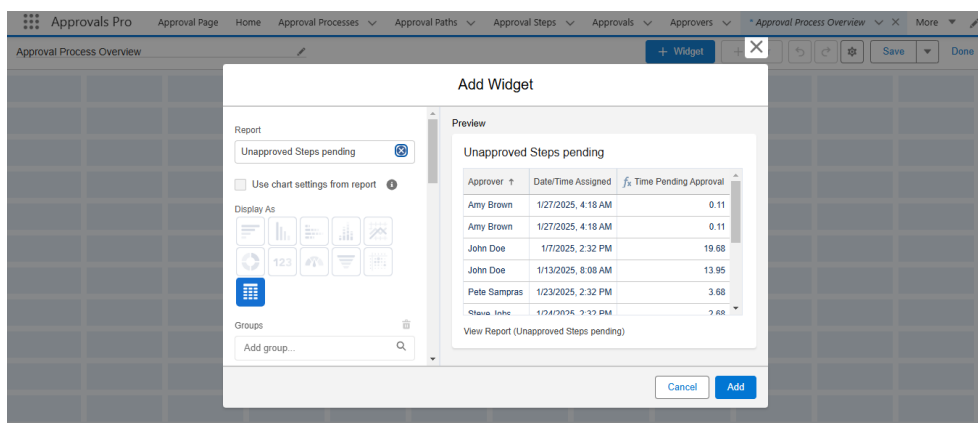
Step 3: Building the Dashboard

1. Click the App Launcher and choose "Dashboards." Click "New Dashboard" and name it appropriately (e.g., "Approval Process Overview").



2. Choose the desired widgets and add reports:

- Add a **Table Widget** for the "Unapproved Steps Pending" report.



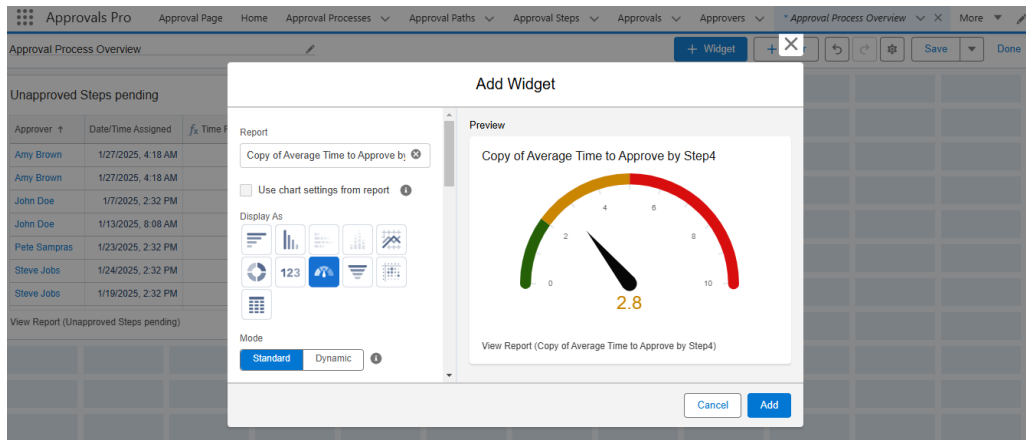
- Apply conditional highlighting to emphasize long pending approvals for the "Time Pending Approval" field.

3. More than 7 days = Red (critical)
4. More than 4 days (up to 7 days)= Orange (warning)
5. 4 days or less= Green (normal)
6. Add the report to the dashboard

Approval: Approval Name	Approver	Date/Time Assigned	Time Pending Approval
AP-0000176	John Doe	1/7/2025, 2:32 PM	19.58
AP-0000173	Steve Jobs	1/7/2025, 2:32 PM	19.58
AP-0000184	Steve Jobs	1/13/2025, 8:08 AM	13.84
AP-0000180	Steve Jobs	1/13/2025, 8:08 AM	13.84
AP-0000183	John Doe	1/13/2025, 8:08 AM	13.84
AP-0000185	Steve Jobs	1/13/2025, 8:08 AM	13.84
AP-0000175	Steve Jobs	1/19/2025, 2:32 PM	7.58
AP-0000177	Pete Sampras	1/23/2025, 2:32 PM	3.58
AP-0000178	Steve Jobs	1/24/2025, 2:32 PM	2.58
AP-0000186	Amy Brown	1/27/2025, 4:18 AM	0.00
AP-0000188	Steve Jobs	1/27/2025, 4:19 AM	0.00
AP-0000187	Amy Brown	1/27/2025, 4:18 AM	0.00

7. Add **Gauge Charts** for the "Avg Approval Time per Step" report:
 - Set the measure to "Average Duration."
 - Configure colors:
 - Green (0-3 days = Good)
 - Yellow (4-7 days = Moderate)
 - Red (8-10 days = Needs Attention)

Tip: To create multiple gauges for different approval steps, duplicate the report by making multiple copies of the report and filter each for specific approval steps. This allows you to create separate visualizations for different stages of the approval process, ensuring each gauge provides meaningful insights for individual steps. Each duplicated report should have filters adjusted based on the step you want to measure, and labeled accordingly for clarity.



8. Arrange the dashboard elements to ensure all information is visible at once, avoiding excessive scrolling.
9. Apply bold formatting to improve readability.

Step 4: Finalizing the Dashboard

- Save the dashboard under an appropriate label.
- Place components strategically to enhance visibility.
- Review the layout and ensure filters function correctly.

By following these steps, you will create reports and dashboards that provide actionable insights into the approval process.

