



Approval Component

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Introduction

The Approval Component by ForzaVizual Lda is a custom component that will help your users easily manage their pending approval requests.

The component can be placed on any lightning page and will show the user the list of approval requests pending the user's approval.

The Approval Detail component will allow the user to see more details (as defined in the Approval Component Manager) about the record up for approval and will allow the user to approve or reject this record.

The Approval Component is optimized for use in the Salesforce mobile app.

Functional Explanation

Installation

The Approval Component can be either installed for all users or just admins.

If installed for all users, all of them will also have access to the Approval Component Manager.

If installed just for admins, there are two permission sets to manage the other user's access.

Permission Sets

The available permission sets are:

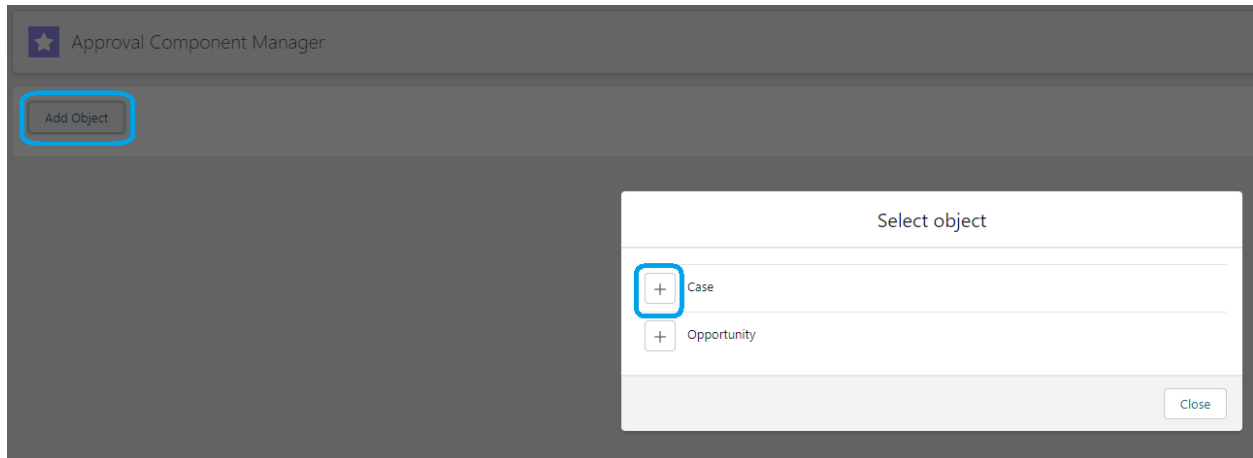
- Approval Component User: with this permission set, a user will have access to the Approval Component (with the list of pending approvals) and, subsequently, to the Approval Detail component)
- Approval Component Manager: users with this permission set will have access to the Approval Component Manager tab and component

Approval Component Manager

The Approval Component Manager is a component placed in a tab with the same name. Users for which the Approval Component has been installed or to whom the specific permission set has been granted, will have access to it.

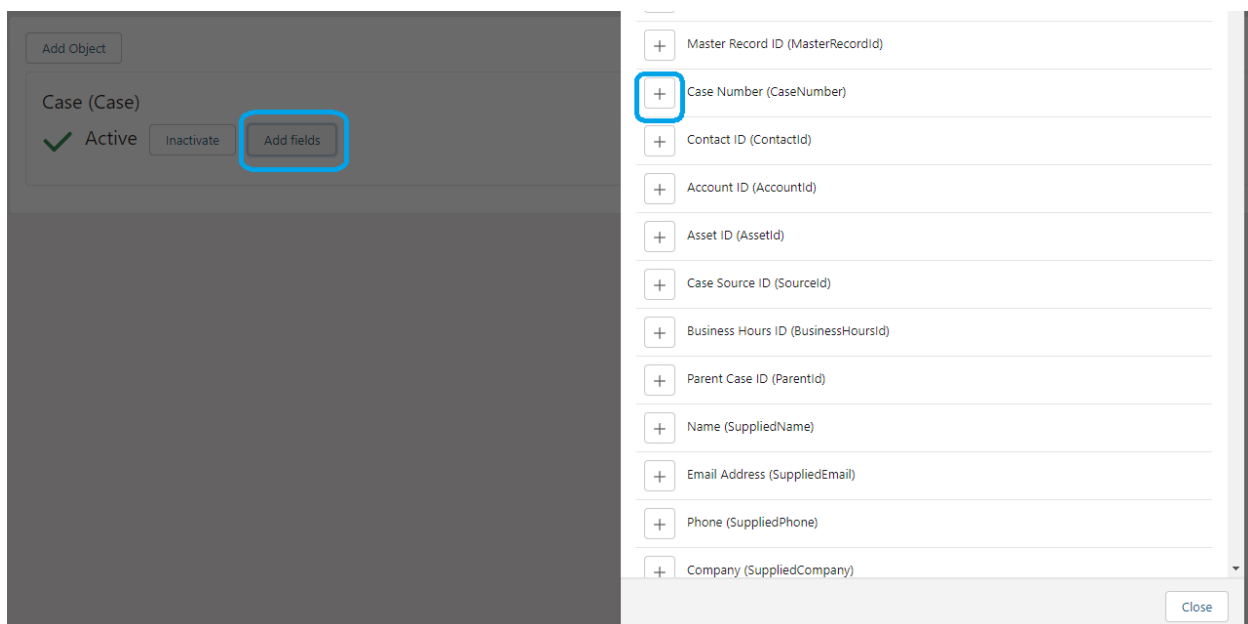
Selecting an object

Only objects that have active approval processes can be selected.



Adding fields

All fields from the selected object can be added to the field list. The fields selected here will then be visible in the Approval Detail.



Rearranging fields

Using the arrows, the fields can be moved up or down. This defines the position they are shown in the Approval Detail.

Approval Component Manager

Add Object

Case (Case)

✓ Active Inactivate Add fields

Order		Field Label	Field API Name	
1	↑ ↓	Case ID	Id	🗑️
2	↑ ↓	Contact ID	ContactId	🗑️
3	↑ ↓	Email Address	SuppliedEmail	🗑️
4	↑ ↓	Record Type ID	RecordTypeId	🗑️

Deleting fields

Using the delete button, the fields can be removed from the selection.

Approval Component Manager

Add Object

Case (Case)

✓ Active Inactivate Add fields

Order		Field Label	Field API Name	
1	↑ ↓	Case ID	Id	🗑️
2	↑ ↓	Contact ID	ContactId	🗑️
3	↑ ↓	Email Address	SuppliedEmail	🗑️
4	↑ ↓	Record Type ID	RecordTypeId	🗑️

Inactivating an object

An object can be inactivated using the specific button (and reactivated afterwards in the same manner).

If an object is not defined in the Approval Component Manager or is inactivated, it will still be visible in the Approval Component but, in the Approval Detail, will only show the standard fields (Object Type, Record Name, Submission Date and Submission Comments).

Approval Component Manager

Add Object

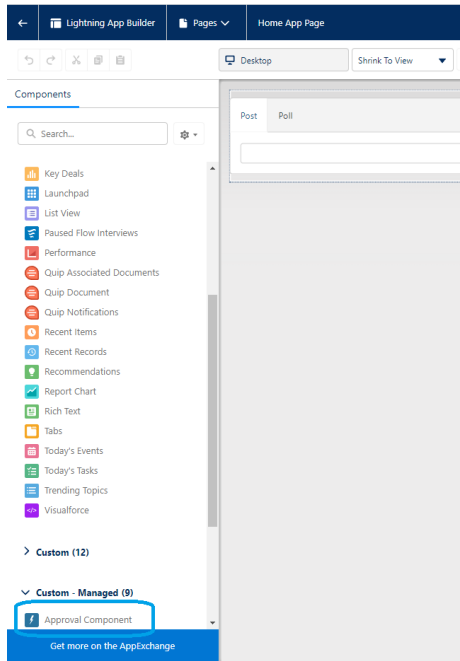
Case (Case)

✓ Active Inactivate Add fields

Order		Field Label	Field API Name	
1	↑ ↓	Case ID	Id	🗑️
2	↑ ↓	Contact ID	ContactId	🗑️
3	↑ ↓	Email Address	SuppliedEmail	🗑️
4	↑ ↓	Record Type ID	RecordTypeId	🗑️

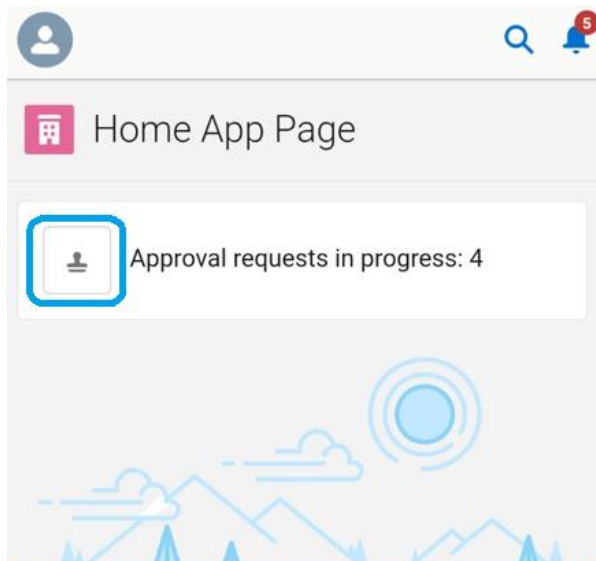
Approval Component

The Approval Component can be placed on any lightning page.

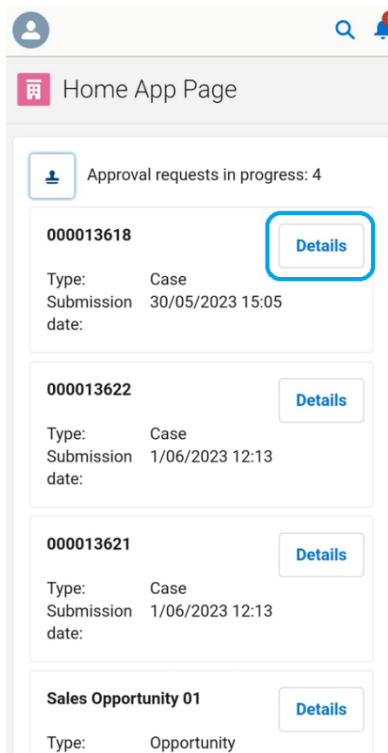


The component will show the user the number of pending approval records he has assigned to himself.

By pressing the icon button, the list of pending approvals is shown.



By clicking on the Details button, the user is taken to the Approval Detail component.

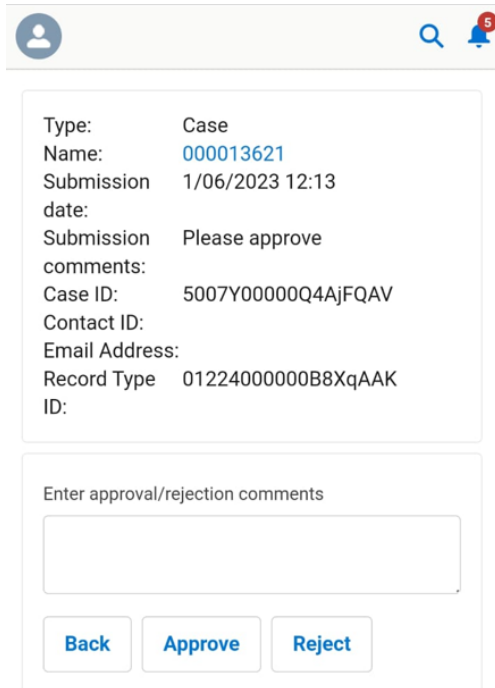


Approval Detail

The Approval Detail component shows the user details of the specific pending approval record.

Object defined in Manager

If the record's object has been defined in the Approval Component Manager, the fields shown will be the ones defined there, in the selected order.



The screenshot shows the top of a web application with a header bar containing a user profile icon, a search icon, and a notification bell with a red '5' badge. Below the header is a light gray box with a list of fields and values: Type: Case, Name: 000013621 (with a link icon), Submission date: 1/06/2023 12:13, Submission comments: Please approve, Case ID: 5007Y00000Q4AjFQAV, Contact ID: , Email Address: , Record Type ID: 01224000000B8XqAAK. Below this box is another light gray box with the label 'Enter approval/rejection comments' and a large text input field. At the bottom of this second box are three buttons: 'Back', 'Approve', and 'Reject'.

Type:	Case
Name:	000013621
Submission date:	1/06/2023 12:13
Submission comments:	Please approve
Case ID:	5007Y00000Q4AjFQAV
Contact ID:	
Email Address:	
Record Type ID:	01224000000B8XqAAK

Enter approval/rejection comments

[Back](#) [Approve](#) [Reject](#)

Object not defined in Manager

If the record's object has not been defined in the Approval Component Manager (or is inactivated there), only the standard fields are shown.

These fields are:

- The record's object name
- The record name (with a link to the record)
- The submission date
- The submission comments



Type: Case

Name: [000013621](#)

Submission date: 1/06/2023 12:13

Submission comments: Please approve

Enter approval/rejection comments

[Back](#) [Approve](#) [Reject](#)

Approving/Rejecting a record

A record can be approved or rejected by using the specific button for each action.

In the comments text area, the approval/rejection comments can be entered.



Type: Case

Name: [000013621](#)

Submission date: 1/06/2023 12:13

Submission comments: Please approve

Enter approval/rejection comments

[Back](#) [Approve](#) [Reject](#)

Technical Design

Custom objects

Two custom objects are part of this package. They are used to manage the fields that are shown in the Approval Detail component.

Approval Component – Object

This object is used to keep the data of the objects where we want to show more fields in the Approval Detail component.

If an object is referenced in this object (and is Active), the ApprovalModel used in the Approval Detail component will use its data to decide which fields to show.

The sharing model is Public Read-Write.

API name: Approval_Component_Object__c

Fields:

API Name	Label	Type	Referenced object
Name	Approval Component - Object Name	Auto Number	
Object_API_Name__c	Object API Name	Text (100)	
Active__c	Active	Checkbox	

Approval Component – Object Field

This object is used to keep the data of the objects where we want to show more fields in the Approval Detail component.

A record must be connected to a Approval_Component_Object__c (master-detail). The records in this object represent the fields that should be shown in the Approval Detail component.

API name: Approval_Component_Object_Field__c

Fields:

API Name	Label	Type	Referenced object
Name	Approval Component - Object Field Name	Auto Number	
API_Field_Name__c	API Field Name	Text (100)	
Active__c	Active	Checkbox	
Order__c	Order	Number (3, 0)	
Object__c	Object__c	Master-Detail	Approval Component - Object

Apex Classes

ApprovalManagerController

Manages all the operations in the approvalDetail component.

ApprovalManagerObjectModel

A model used to show the selected objects (records from Approval_Component_Object__c) in the approvalManager LWC.

ApprovalManagerObjectFieldModel

A model used to show the selected objects (records from Approval_Component_Object_Field__c) in the approvalManager LWC.

ApprovalController

Manages all the operations in the approvalComponent and the approvalDetail component.

ApprovalModel

A model used to show the data related to the record to be approved in the approvalDetail LWC.

ApprovalModelField

A model used to show the fields (as defined in Approval_Component_Object_Field__c) for the record to be approved in the approvalDetail LWC. Only the accessible fields are shown (a check on isAccessible() is done for all fields).

ApprovalTestClass

The test class to cover the other 6 classes.

Lightning Components

approvalComponent

A LWC component to be placed in any lightning page. This component shows the user his pending approvals.

approvalDetail

A LWC accessible from the approvalComponent. There is an aura component called ApprovalDetailAura to support redirection from a button in LWC approvalComponent to the approvalDetail. This aura component has inside it the approvalDetail LWC and implements lightning:isUrlAddressable. The approvalDetail component shows data related to the record to be approved/rejected. The fields shown on this component are defined in the approvalManager LWC.

approvalManager

This LWC manages the fields that show up on approvalDetail. It uses 2 custom objects to do so: Approval_Component_Object__c and Approval_Component_Object_Field__c. The LWC allows the user to create a record in Approval_Component_Object__c for objects that have an active approval process (a query on ProcessDefinition is done to get that information). Then the fields of the selected target object can be selected and will be added to the Approval_Component_Object_Field__c object. The order in which the fields appear in approvalDetail can also be easily defined by the user in the approvalManager component and this is reflected in the Order__c field.

Permission sets

Approval Component Manager

Used to give access to the Approval Component Manager feature. Gives full access to objects Approval_Component_Object__c and Approval_Component_Object_Field__c. Gives access to apex class ApprovalManagerController.

Approval Component User

Used to give access to the general Approval Component feature (approvalComponent and approvalDetail). Gives access to apex class ApprovalController.

Languages

There are 22 custom labels, translated in the following languages: English, Spanish, Italian, German, Nederlands, Swedish, Danish and Portugueses (Brazil).