Approval Processes

Housekeeping

Here is the ERD for the Approval Process Objects. Typically reporting will be done from the Process Instance Step => Process Instance => Process Definition or from the Process Instance => Process Definition.

Process Instance Steps

Process Steps show any pending, completed, or recalled approval process steps.

SOAP API Developer Documentation

Retrieve all Process Steps that are Pending Approval

```
SELECT Id, ProcessInstance.TargetObjectId, CreatedBy.Name, Actor.Name, OriginalActor.Name,
ProcessInstance.Status, ProcessInstance.TargetObject.Type, ElapsedTimeInDays,
ElapsedTimeInHours, ElapsedTimeInMinutes
FROM ProcessInstanceWorkitem
WHERE ProcessInstance.Status IN ('Pending', 'Started')
```

Retrieve all Process Steps that are Pending Approval and apply to a specific object

```
SELECT Id, ProcessInstance.TargetObjectId, CreatedBy.Name, Actor.Name, OriginalActor.Name,
ProcessInstance.Status, ProcessInstance.TargetObject.Type, ElapsedTimeInDays,
ElapsedTimeInHours, ElapsedTimeInMinutes
FROM ProcessInstanceWorkitem
WHERE ProcessInstance.Status IN ('Pending', 'Started') AND ProcessInstance.TargetObject.Type =
'Opportunity'
```

Getting Metrics on Approval Process Completion

Process Instance SOAP API Developer Documentation

Process Definition SOAP API Developer Documentation

```
SELECT
ProcessDefinition.Name,SUM(ElapsedTimeInDays),SUM(ElapsedTimeInHours),SUM(ElapsedTimeInMinutes
),COUNT(Id),Status,TargetObject.Type
FROM ProcessInstance
WHERE ProcessDefinition.State = 'Active' AND Status IN ('Approved','Rejected')
GROUP BY ProcessDefinitionId, ProcessDefinition.Name,Status,TargetObject.Type
```

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