

# LEAVE REQUEST

User guide – Administrator

Version 2.0

## MENU

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## Overview

This document helps to administrator setup the app “Leave Request Pro”. There are 6 steps that need administrator to setup.

1. Install the app to site
2. Customize Left Menu: This step allows administrator to customize the left menu for consistent an organization. The administrator can reorder items in left menu and share permission for each item of left menu.
3. Customize Form: This step allows administrator to customize the form for consistent an organization. The administrator can add, edit, delete any field that he wants
4. Views Setting: This step allows administrator to choose the field that he wants to show in view
5. Change workflows. This step allows administrator to change the Workflow for consistent an organization.
6. Update Email templates. This step allows administrator to change the Email Template for consistent an organization.
7. Setting up approval managers per department or user
8. Allows the user who can delete the request

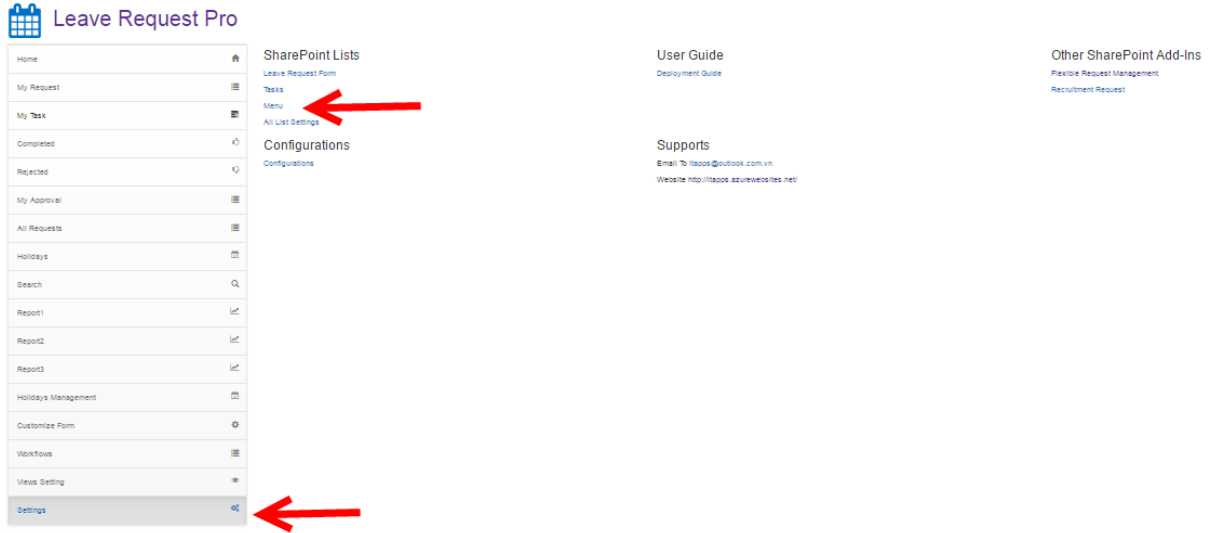
## Step 1: Install the app to site

## Step 2: Customize Left Menu

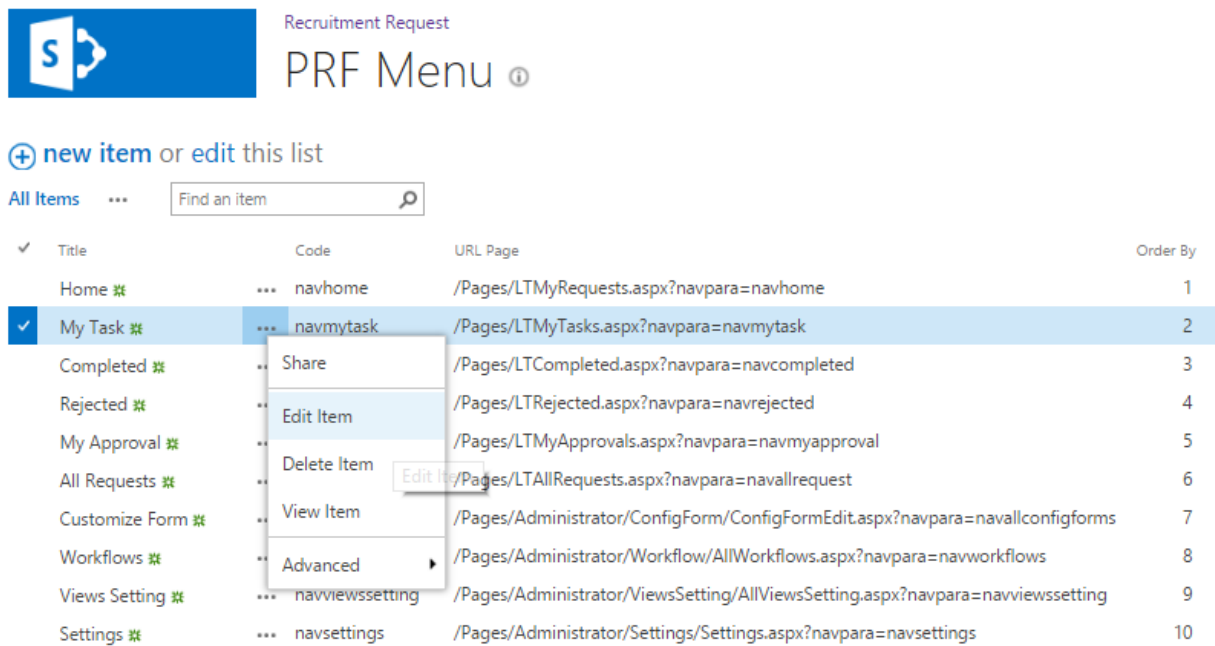
This step allows administrator to customize the left menu for consistent an organization. The administrator can reorder items in left menu and share permission for each item of left menu.

### Edit Item

In **settings** page, Click “**Menu**” under **SharePoint Lists** Tab



In **PRF Menu** List page, the administrator can edit any items if he wants.



## Share Permission

In **PRF Menu** List page, Click **Share** in context menu



Recruitment Request

# PRF Menu ⓘ

[+ new item](#) or [edit this list](#)

All Items ...  🔍

| ✓ | Title                         | Code                  | URL Page   | Order By |
|---|-------------------------------|-----------------------|--|----------|
|   | Home <span>⌵</span>           | ... navhome           | /Pages/LTMyRequests.aspx?navpara=navhome                                       | 1        |
|   | My Task <span>⌵</span>        | ... navmytask         | /Pages/LTMyTasks.aspx?navpara=navmytask  | 2        |
|   | Completed <span>⌵</span>      | ... navcompleted      | /Pages/LTCompleted.aspx?navpara=navcompleted                                   | 3        |
|   | Rejected <span>⌵</span>       | ... navrejected       | /Pages/LTRejected.aspx?navpara=navrejected                                     | 4        |
|   | My Approval <span>⌵</span>    | ... navmyapproval     | /Pages/LTMyApprovals.aspx?navpara=navmyapproval                                | 5        |
|   | All Requests <span>⌵</span>   | ... navallrequest     | /Pages/LTAllRequests.aspx?navpara=navallrequest                                | 6        |
| ✓ | Customize Form <span>⌵</span> | ... navallconfiaforms | /Pages/Administrator/ConfigForm/ConfigFormEdit.aspx?navpara=navallconfigforms  | 7        |
|   | Workflows <span>⌵</span>      | ...                   | /Pages/Administrator/Workflow/AllWorkflows.aspx?navpara=navworkflows           | 8        |
|   | Views Setting <span>⌵</span>  | ...                   | /Pages/Administrator/ViewsSetting/AllViewsSetting.aspx?navpara=navviewssetting | 9        |
|   | Settings <span>⌵</span>       | ...                   | /Pages/Administrator/Settings/Settings.aspx?navpara=navsettings                | 10       |

Share

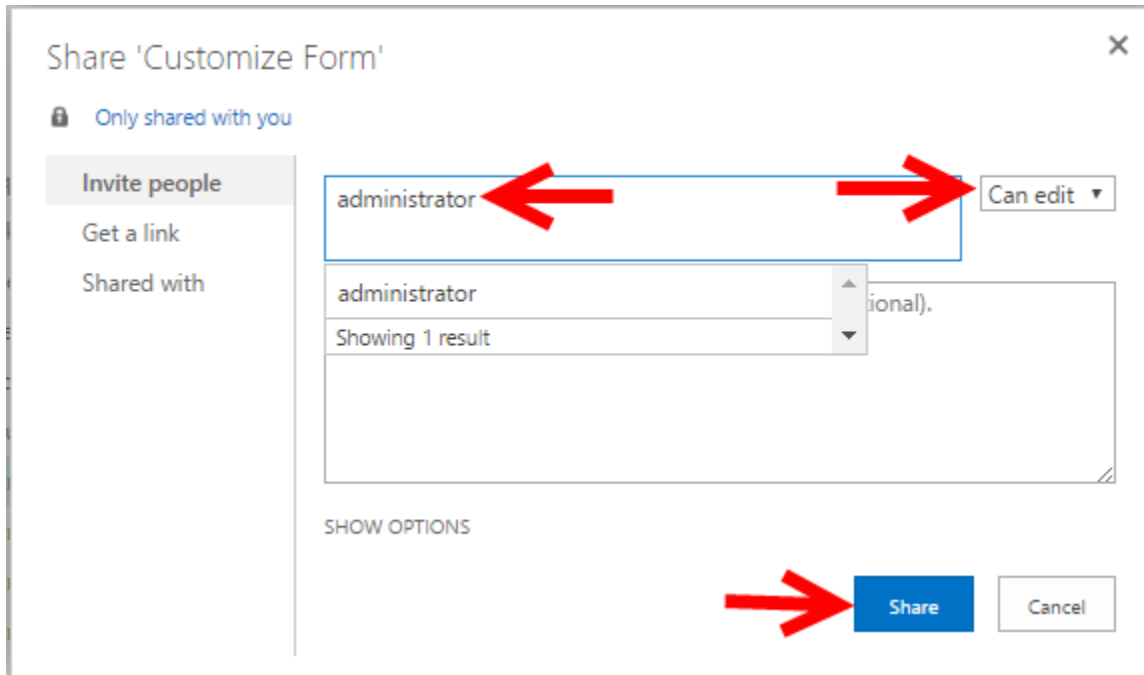
Edit Item Share

Delete Item

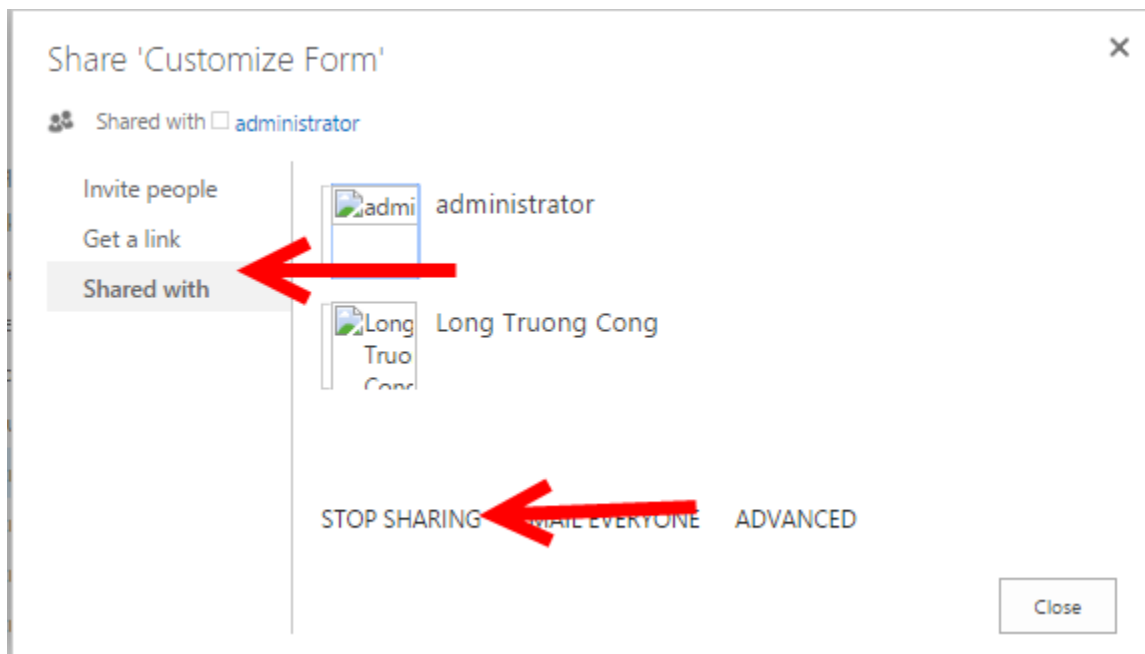
View Item

Advanced ▶

In popup appear. Select User, choose a permission, then click **Share**



If you want to remove all permissions in the item, select **Share with** in left, then click **Stop Sharing**.



**Note:** if user does have permission "View" in item, user will not see it in left menu

### Step 3: Customize Form







This step allows administrator to customize the form for consistent an organization. The administrator can add, edit, delete any field that he wants. This tool supports many types of [SharePoint Field](#)

Type of field supports:

- Single line of text
- Multiple lines of text (Not supports Rich Text)
- Choice
- Number
- Currency
- Date and Time
- Lookup (Not supports addition field)
- Yes/No
- Person or Group (Not supports Group)
- Hyperlink or Picture
- Calculated

### All Fields of Form

This view that administrator can add, edit, delete and reorder the field. When any field changes, please click “Update changes” button

| + New <span style="border: 1px solid red; padding: 2px;">1</span>   |   |                |                 |          |
|---|---|----------------|-----------------|----------|
| Update Change <span style="border: 1px solid red; padding: 2px;">2</span> Update* button if any changes (don't delete 2 fields 'Start date' and 'End date') |   |                |                 |          |
| Order   | Edit  | Display Name   | Static Name     | Type     |
| 0 <span style="border: 1px solid red; padding: 2px;">4</span>   |    | Department     | LT_Department   | Choice   |
| 1 <input type="text" value="1"/>  |  <span style="border: 1px solid red; padding: 2px;">3</span> | Start Date     | LT_StartDate    | DateTime |
| 2 <input type="text" value="2"/>  |    | End Date       | LT_EndDate      | DateTime |
| 3 <input type="text" value="3"/>  |    | Number Day off | LT_NumberDayOff | Number   |
| 4 <input type="text" value="4"/>  |    | Reason         | LT_Reason       | Choice   |
| 5 <input type="text" value="5"/>  |    | Detail         | LT_Detail       | Note     |

- (1): New a Field
- (2): Update Changes
- (3): Edit a Field
- (4): Reorder

### New Field Form

This form is new field form of SharePoint. The administrator can select type that he wants.



**Name and Type**

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Task Outcome
- External Data
- Managed Metadata

**Additional Column Settings**

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes  No

Enforce unique values:

- Yes  No

Maximum number of characters:

Default value:

- Text  Calculated Value

**Edit or Delete Field Form**

This form is default form of SharePoint. The administrator can delete, change the field.





Leave Request Pro

## Settings › Edit Column ⓘ

### Name and Type

Type a name for this column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Enforce unique values:

- Yes
- No

Type each choice on a separate line:




Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

- Yes
- No

Default value:

- Choice
- Calculated Value

Column Validation




## Step 4: Views Setting

This step allows administrator to choose the field that he wants to show in view.

2 types of view setting form

- View setting form for “My Task” and “My Approval”
- And for else

| Edit  | View Name     |
|---|---------------|
|  | View Calendar |
|  | My Requests   |
|  | My Tasks      |
|  | Completed     |
|  | Rejected      |
|  | My Approvals  |
|  | All Requests  |
|  | Search        |
|  | Report 1      |
|  | Report 2      |
|  | Report 3      |

### View Setting form for “My task” and “My approval”

This form supports some types of field: Text, Number, Date Time

View My Tasks

Please click "Update" button if any changes
[Save Change](#)
[Close](#)

|                                     | Order | Display Name   | Type     | Width(%)                                 |
|-------------------------------------|-------|----------------|----------|--|
| <input checked="" type="checkbox"/> | 0     | Start Date     | DateTime | <input style="width: 80%;" type="text"/> |
| <input checked="" type="checkbox"/> | 1     | End Date       | DateTime | <input style="width: 80%;" type="text"/> |
| <input checked="" type="checkbox"/> | 2     | Number Day off | Number   | <input style="width: 80%;" type="text"/> |
| <input type="checkbox"/>            | 3     | Created        | DateTime | <input style="width: 80%;" type="text"/> |
| <input type="checkbox"/>            | 4     | Modified       | DateTime | <input style="width: 80%;" type="text"/> |

Please click "Update" button if any changes
[Save Change](#)
[Close](#)

## And Else

This form supports all types of field.

### View All Requests □

Sort by

Start Date ▾

Asc ▾

Limit Rows:

Please click "Update" button if any changes

Save
Close

|                                     | Order                            | Display Name   | Type     | Width(%)                                  |
|-------------------------------------|----------------------------------|----------------|----------|---|
| <input checked="" type="checkbox"/> | <input type="text" value="0"/> ▾ | Requestor      | User     | <input style="width: 80px;" type="text"/> |
| <input checked="" type="checkbox"/> | <input type="text" value="1"/> ▾ | Department     | Choice   | <input style="width: 80px;" type="text"/> |
| <input checked="" type="checkbox"/> | <input type="text" value="2"/> ▾ | Start Date     | DateTime | <input style="width: 80px;" type="text"/> |
| <input checked="" type="checkbox"/> | <input type="text" value="3"/> ▾ | End Date       | DateTime | <input style="width: 80px;" type="text"/> |
| <input checked="" type="checkbox"/> | <input type="text" value="4"/> ▾ | Number Day off | Number   | <input style="width: 80px;" type="text"/> |
| <input checked="" type="checkbox"/> | <input type="text" value="5"/> ▾ | Reason         | Choice   | <input style="width: 80px;" type="text"/> |
| <input checked="" type="checkbox"/> | <input type="text" value="6"/> ▾ | Stage          | Number   | <input style="width: 80px;" type="text"/> |

**Note:** Limit Rows is 0 that means 5000 items

## Step 5: Change workflows

This step allows administrator to change the Workflow for consistent an organization.

1. In left menu, click **Workflows**

+ New
Status: Active ▾

| Edit | Title          | Assign To | Select User | Next Step      | Order | Active | Email Templates | Delete |
|------|----------------|-----------|-------------|----------------|-------|--------|-----------------|--------|
|      | Requestor      |           | No          | Manager        | 1     | Yes    |                 |        |
|      | Manager        |           | Yes         | Human resource | 2     | Yes    |                 |        |
|      | Human resource | requestor | No          | Finished       | 3     | Yes    |                 |        |

2. If want to new step. Please click **New**

**Workflow** □

Title  **1**

---

Select User i  
 Yes  No **2**

---

Assign To  **3**

---

Next Step  **4**

---

Can edit i  
 Yes  No **5**

---

Active  Yes  No **6**

---

Order  **7**

---

**8**

- (1): Name of step
- (2): Select User. The “Assign To” field will display in the “Request” form if you choose ‘Yes’
- (3): Assign To: if select user is No
- (4): Next Step: if this step is last step, this step is Finished

- (5): Can Edit: User can edit data in the “Request” form if you choose ‘Yes’
- (6): Active
- (7): Order By
- (8): Save

3. If want to change step. Please click **Edit** Icon

4. If want to delete step. Please click **Delete** Icon.













**Note**

- Can't delete a step “Requestor” because this step is first step.
- Can't delete a step if this step is used

## Step 6: Update Email Templates

This step allows administrator to change the Email Template for consistent an organization.

1. In left menu, click **Workflows**. Click **hand icon** to update an email template. **Hand up** is approval, **hand down** is reject

| + New   |                |           |             |                |       |   | Status:   | Active  |  |
|---|----------------|-----------|-------------|----------------|-------|---|---|---|--|
| Edit  | Title          | Assign To | Select User | Next Step      | Order | Active  | Email Templates   | Delete  |  |
|  | Requestor      |           | No          | Manager        | 1     | Yes  |   |  |  |
|  | Manager        |           | Yes         | Human resource | 2     | Yes   |   |  |  |
|  | Human resource | requestor | No          | Finished       | 3     | Yes   |   |  |  |

2. Edit an email template

CC Step

\* Requestor **1**

---

CC User

Choose option **2**

---

Subject

Leave Request - [%LT\_Requestor%] - Approval **3** **4** Lookup

---

Body

Font - Formatting - Font size - B I U A [align icons] [list icons] [quote icons] [table icons] [undo] [redo] [link] [unlink] [table border]

[-] [\*] [text color] [background color] [code] [x]

You've received a new Leave Request. Approve it by accessing the link below.  
Please click [%Here%]

**5** Information

|                |                     |
|----------------|---------------------|
| Department     | [%LT_Department%]   |
| Start Date     | [%LT_StartDate%]    |
| End Date       | [%LT_EndDate%]      |
| Number Day off | [%LT_NumberDayOff%] |
| Reason         | [%LT_Reason%]       |
| Detail         | [%LT_Detail%]       |

---

Lookup **6** **7** Save Close

- (1): CC Step: CC Email to “Assign To” of step
- (2): CC User: CC User
- (3): Subject Email
- (4): Lookup field for subject
- (5): Body
- (6): Lookup field for body
- (7): Save

### 3. Lookup field

## Lookup Field

Field

Created

Select

Close

## Step 7: Setting up approval managers per department or user

There are 3 ways to set manager for the user

1. Choosing the manager (Assign To)
2. Setting manager for the department
3. Setting manager for the user

### Choosing the manager (Assign To) when creating a new request

That way is the default way in the add-in. The configuration that go to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Workflow"

Get Manager *Auto choose the manager of user when create a new request.*

From Workflow

That way has 2 options

1. Choosing the manager when creating a new form

Assign To \*

× Demo

Request

Close

2. Choosing the manager in the step of workflow. With this option, the user doesn't need choose the manager in the new form. The manager who set in the step will manager of the user

## Workflow

Title

Manager

Select User 

Yes  No

Assign To

## Setting manager for the department

The configuration has 2 steps

1. Going to the Manager of Department page (Settings->Manager of Department). Then add managers for each department list

| Department             | Managers   |                                       |
|------------------------|--|---------------------------------------|
| Information Technology | <input type="button" value="x Demo"/> <input type="text"/>           | <input type="button" value="Update"/> |
| Human Resource         | <input type="button" value="x LTAPPS Support"/> <input type="text"/> | <input type="button" value="Update"/> |
| Accounting             | <input type="button" value="x Demo"/> <input type="text"/>           | <input type="button" value="Update"/> |

2. Going to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Manager of Department List"

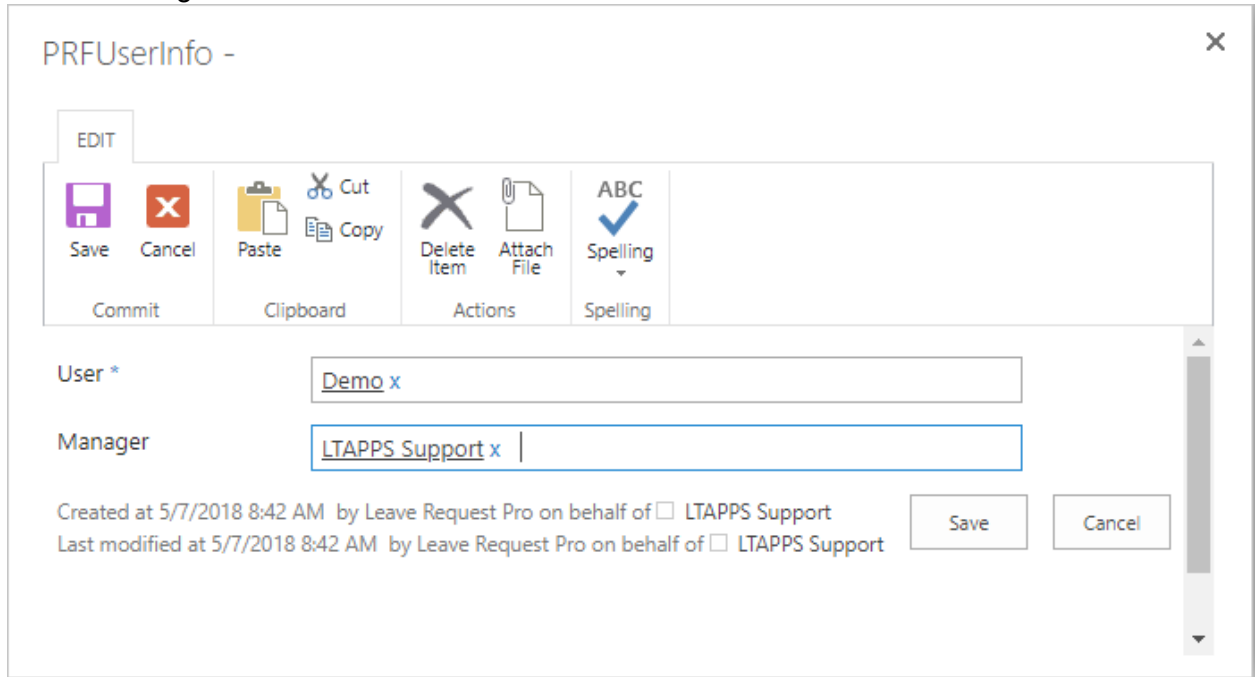
|   |  |
|---|--|
| Get Manager <i>Auto choose the manager of user when create a new request.</i> | <input type="text" value="From Manager of Department list"/> |
|---|--|



## Setting manager for the user

The configuration has 2 steps

1. Going to the Manager of Department page (Settings->User). Then add the user and his/her manager



PRFUserInfo -

EDIT

Save Cancel Paste Copy Delete Item Attach File Spelling

User \* Demo x

Manager LTAPPS Support x

Created at 5/7/2018 8:42 AM by Leave Request Pro on behalf of  LTAPPS Support  
 Last modified at 5/7/2018 8:42 AM by Leave Request Pro on behalf of  LTAPPS Support

Save Cancel

2. Going to the General Configuration page (Settings -> General Configuration) -> “Get manager” dropdown is “From User Info List”

Get Manager Auto choose the manager of user when create a new request.

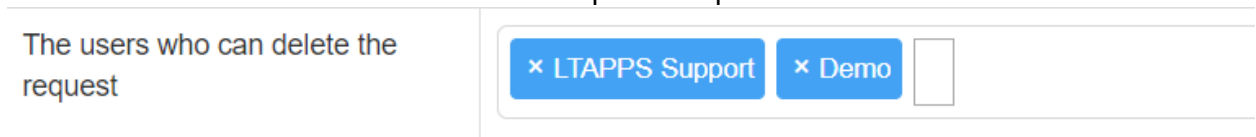
From User Info List

## Step 8: Allows the user who can delete the request

That step configures the rule which allows the user can delete the request after it is finished or not

That step has 2 child steps







1. Going to the General Configuration page (Settings -> General Configuration) ->Then add the user to “The users who can delete the request” dropdown



The users who can delete the request

x LTAPPS Support x Demo

2. Going to the Search page, then find the request which needs to delete -> click Delete icon

| View  | Requestor      | Department             | Start Date       | End Date         | Number Day off | Reason       | Stage          | Status   | Delete  |
|---|----------------|------------------------|------------------|------------------|----------------|--------------|----------------|----------|---|
|  | LTAPPS Support | Information Technology | 05/07/2018 22:26 | 05/07/2018 22:26 | 1              | Annual Leave | Human resource | Finished |  |
|  | LTAPPS Support | Information Technology | 05/07/2018 22:30 | 05/07/2018 22:30 | 2              | Sick Leave   | Human resource | Finished |  |
|  | Demo           | Information Technology | 05/07/2018 22:38 | 05/07/2018 22:38 | 2              | Annual Leave | Human resource | Finished |  |

Showing 1 to 3 of 3 entries