LEAVE REQUEST

User guide – Administrator

Version 2.0

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MENU

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

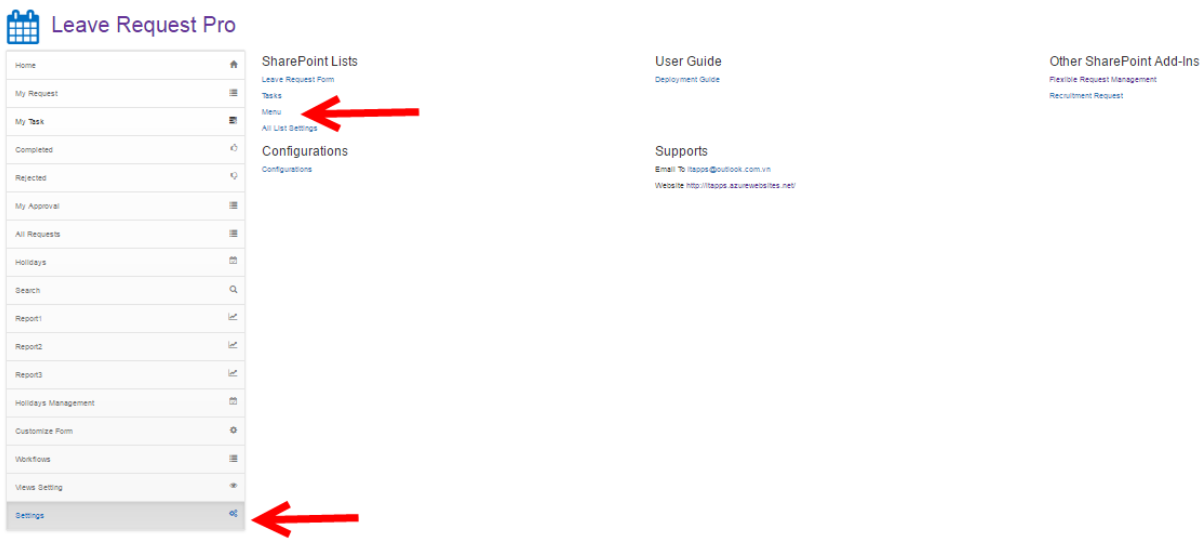
Step 1: Install the app to site

Step 2: Customize Left Menu

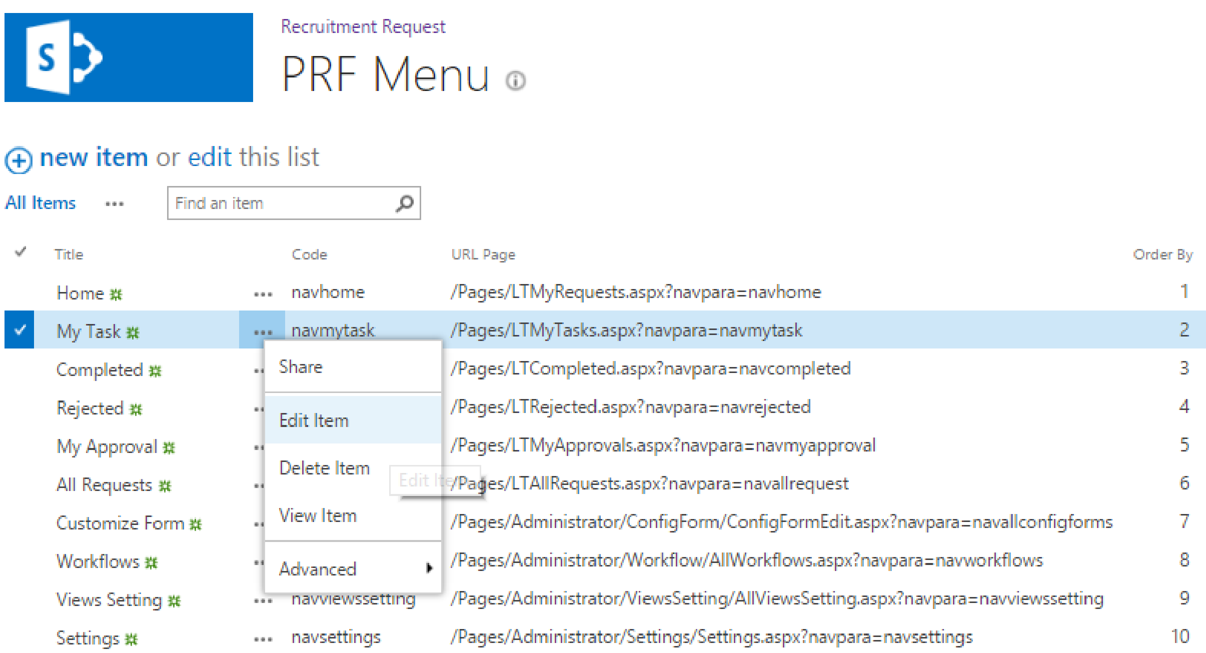
This step allows administrator to customize the left menu for consistent an organization. The administrator can reorder items in left menu and share permission for each item of left menu.

Edit Item

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

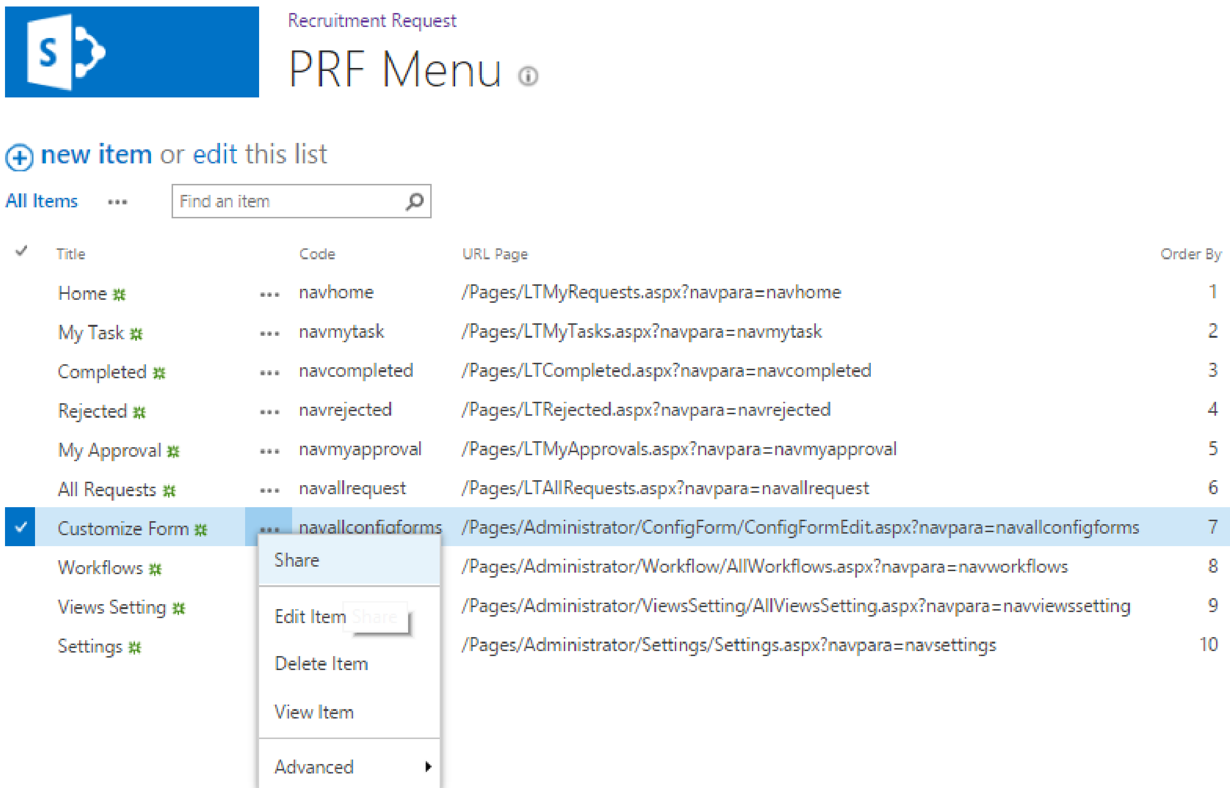


In **PRF Menu** List page, the administrator can edit any items if he wants.

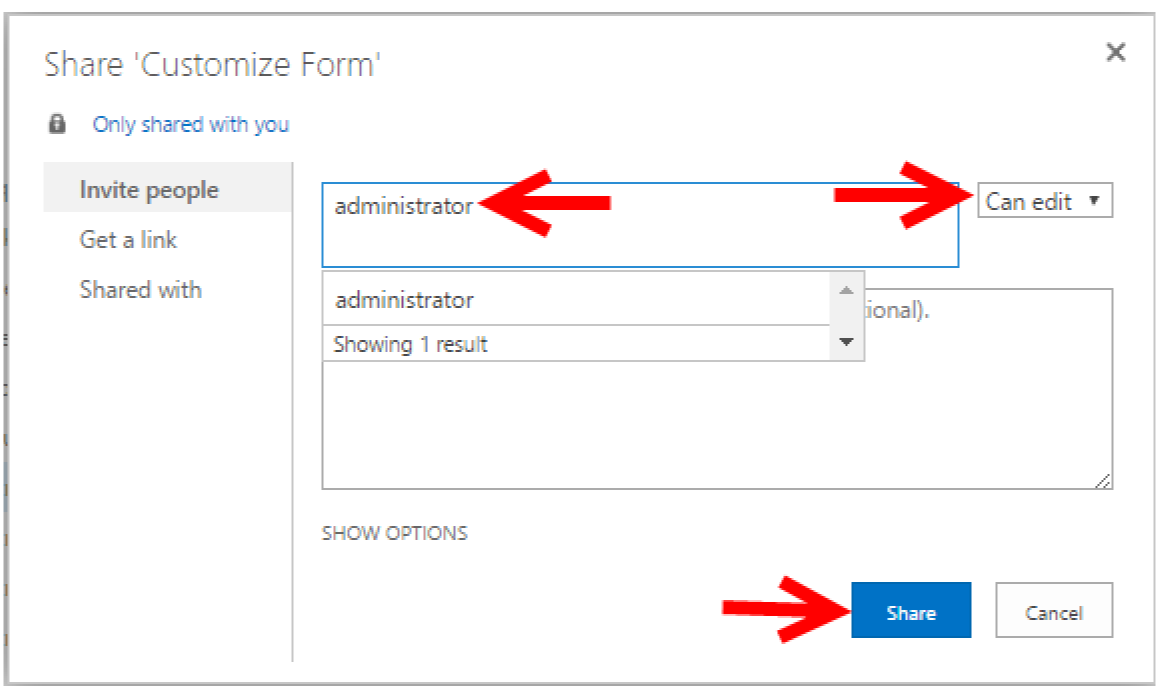


Share Permission

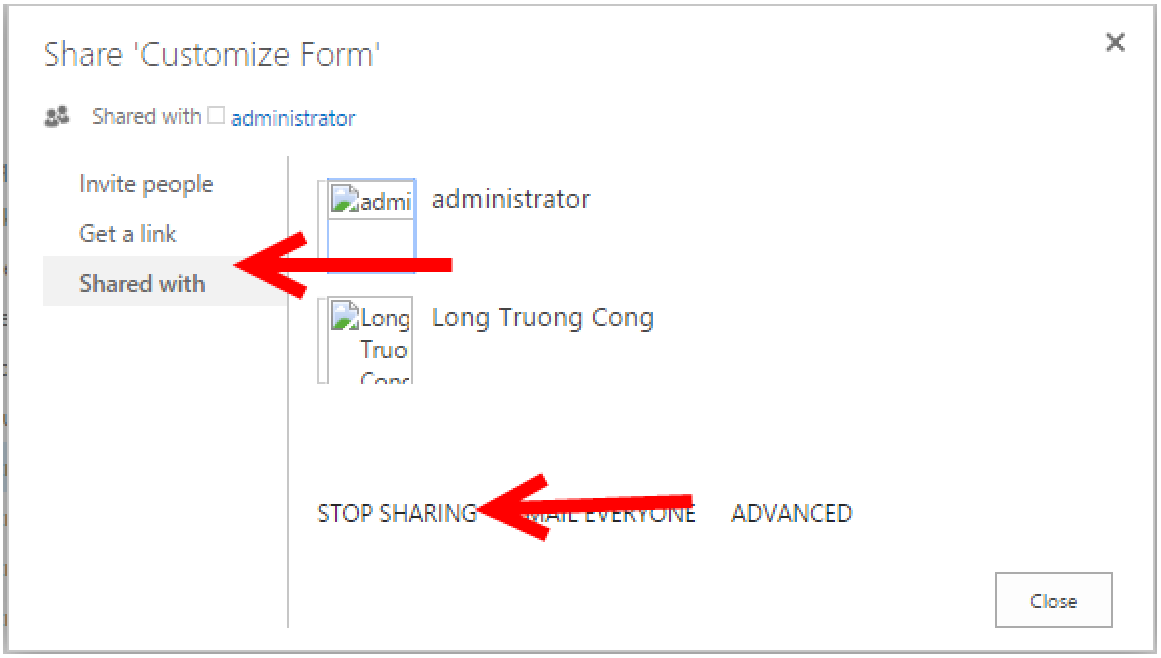
In **PRF Menu** List page, Click **Share** in context menu



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

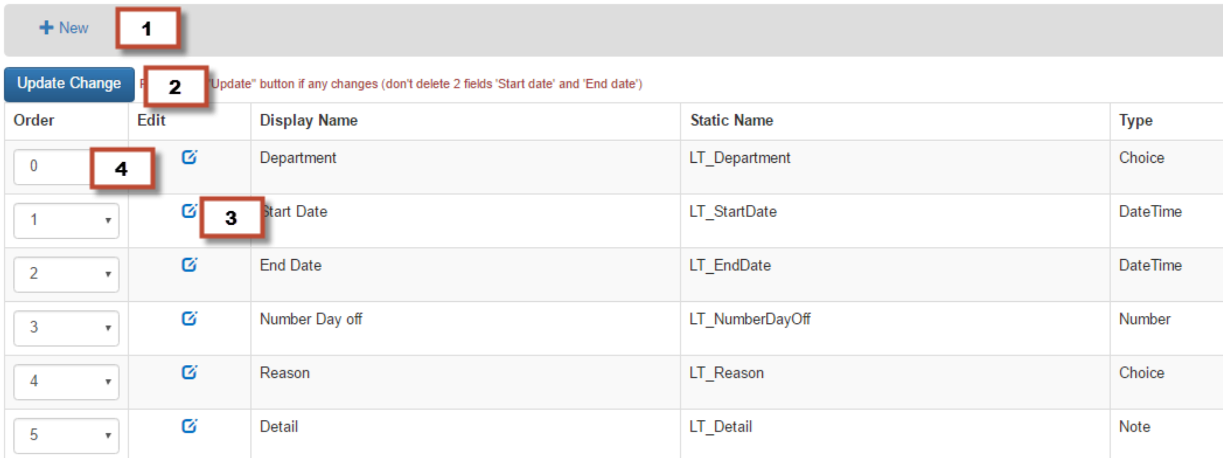
This step allows administrator to customize the form for consistent an organization. The administrator can add, edit, delete any field that he wants. This tool supports many types of [SharePoint Field](#)

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

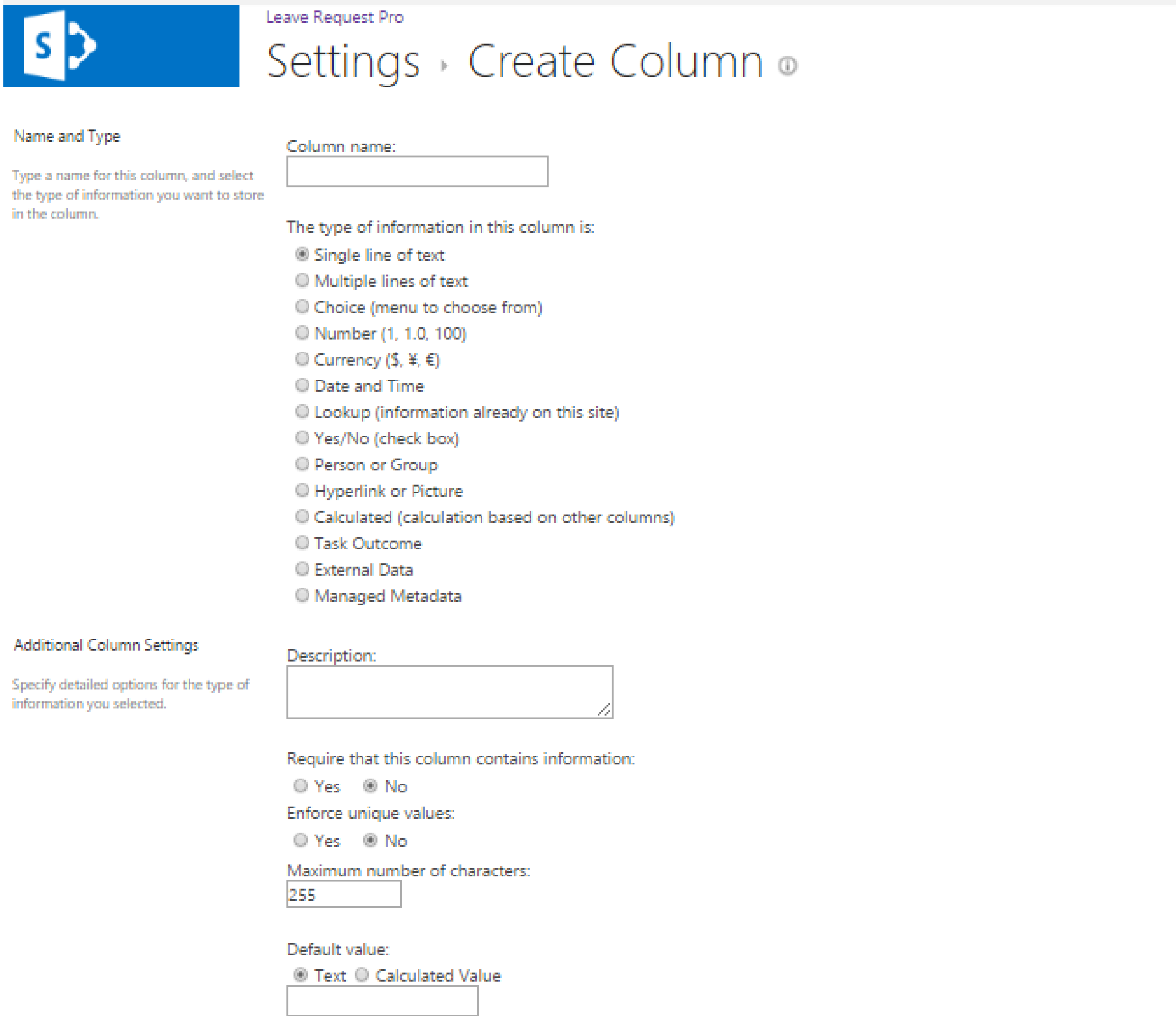


Order	Edit	Display Name	Static Name	Type
0		Department	LT_Department	Choice
1		Start Date	LT_StartDate	DateTime
2		End Date	LT_EndDate	DateTime
3		Number Day off	LT_NumberDayOff	Number
4		Reason	LT_Reason	Choice
5		Detail	LT_Detail	Note

- (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.



Edit or Delete Field Form

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

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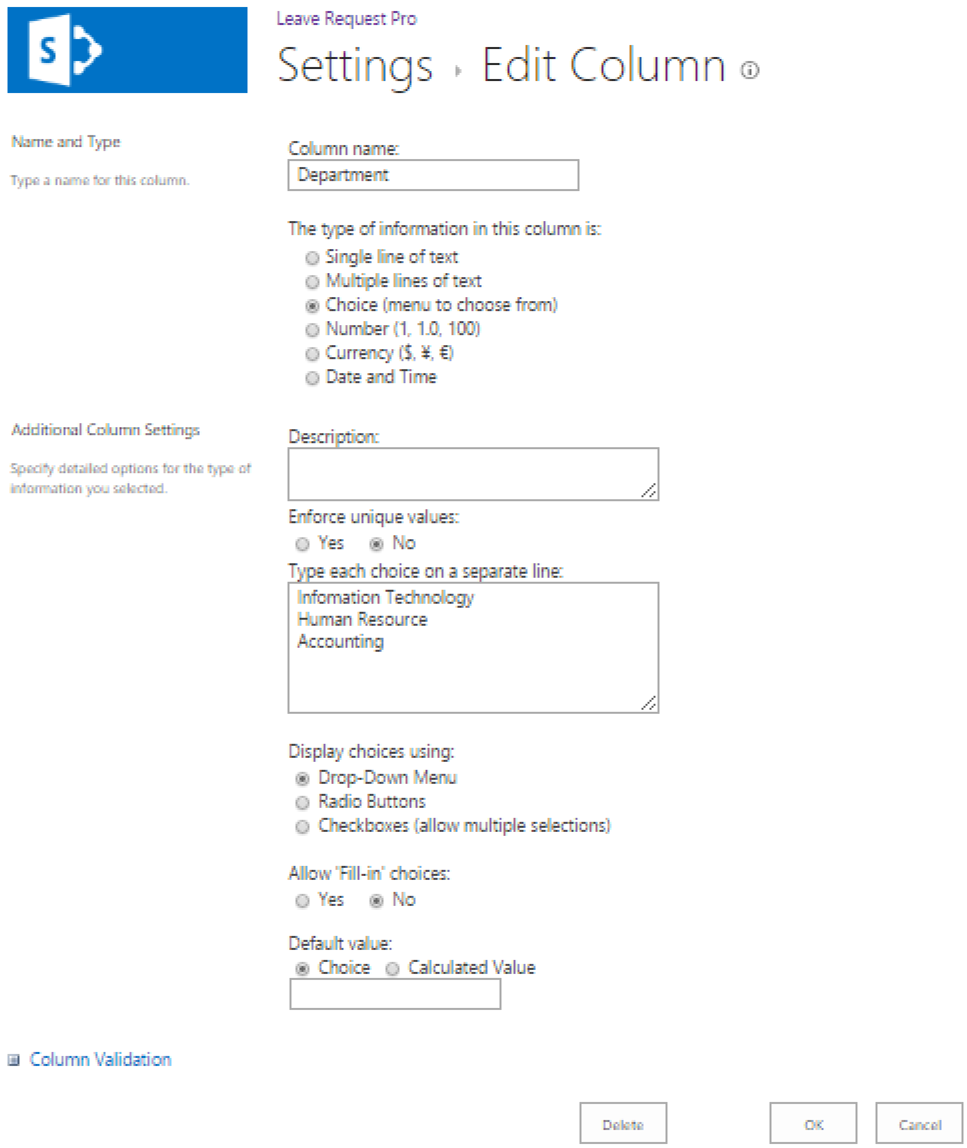


Step 4: Views Setting

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

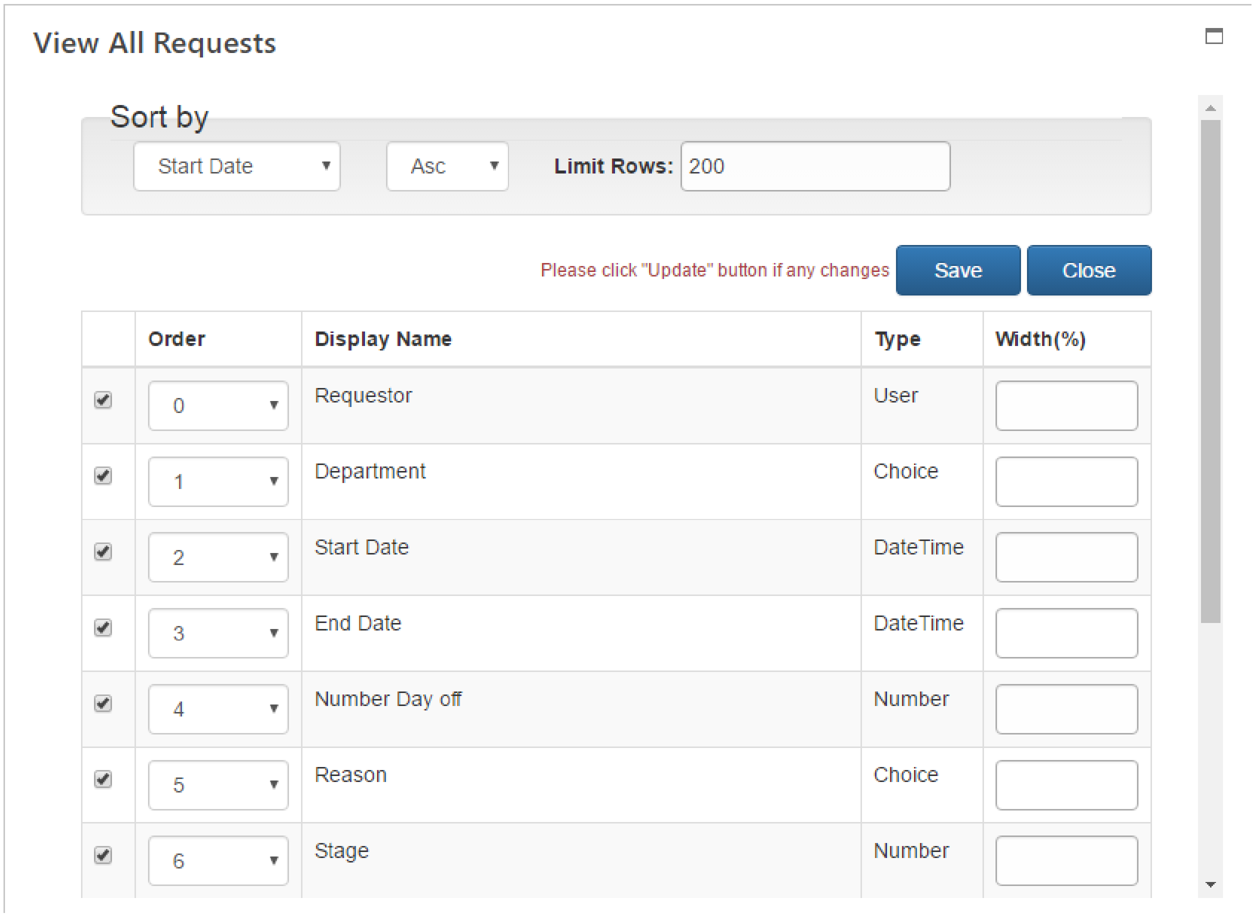
Please click "Update" button if any changes Save Change Close

	Order	Display Name	Type	Width(%)
☑	0	Start Date	DateTime	
☑	1	End Date	DateTime	
☑	2	Number Day off	Number	
☐	3	Created	DateTime	
☐	4	Modified	DateTime	

Please click "Update" button if any changes Save Change Close

<u>And Else</u>

This form supports all types of field.



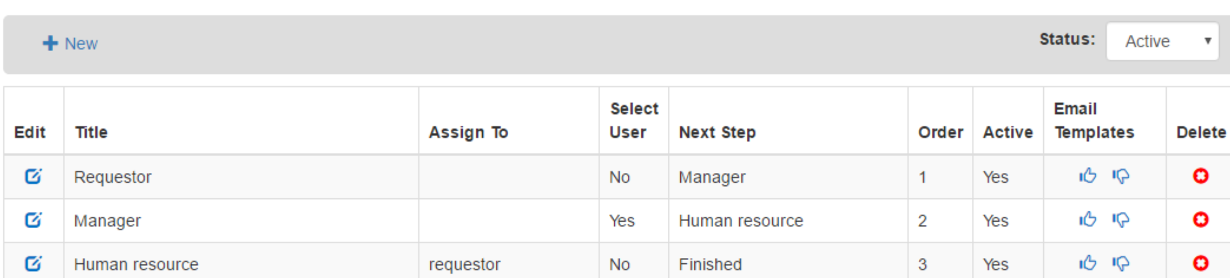
	Order	Display Name	Type	Width(%)
✔	0	Requestor	User	
✔	1	Department	Choice	
✔	2	Start Date	DateTime	
✔	3	End Date	DateTime	
✔	4	Number Day off	Number	
✔	5	Reason	Choice	
✔	6	Stage	Number	

<u>Note</u>: Limit Rows is 0 that means 5000 items

Step 5: Change workflows

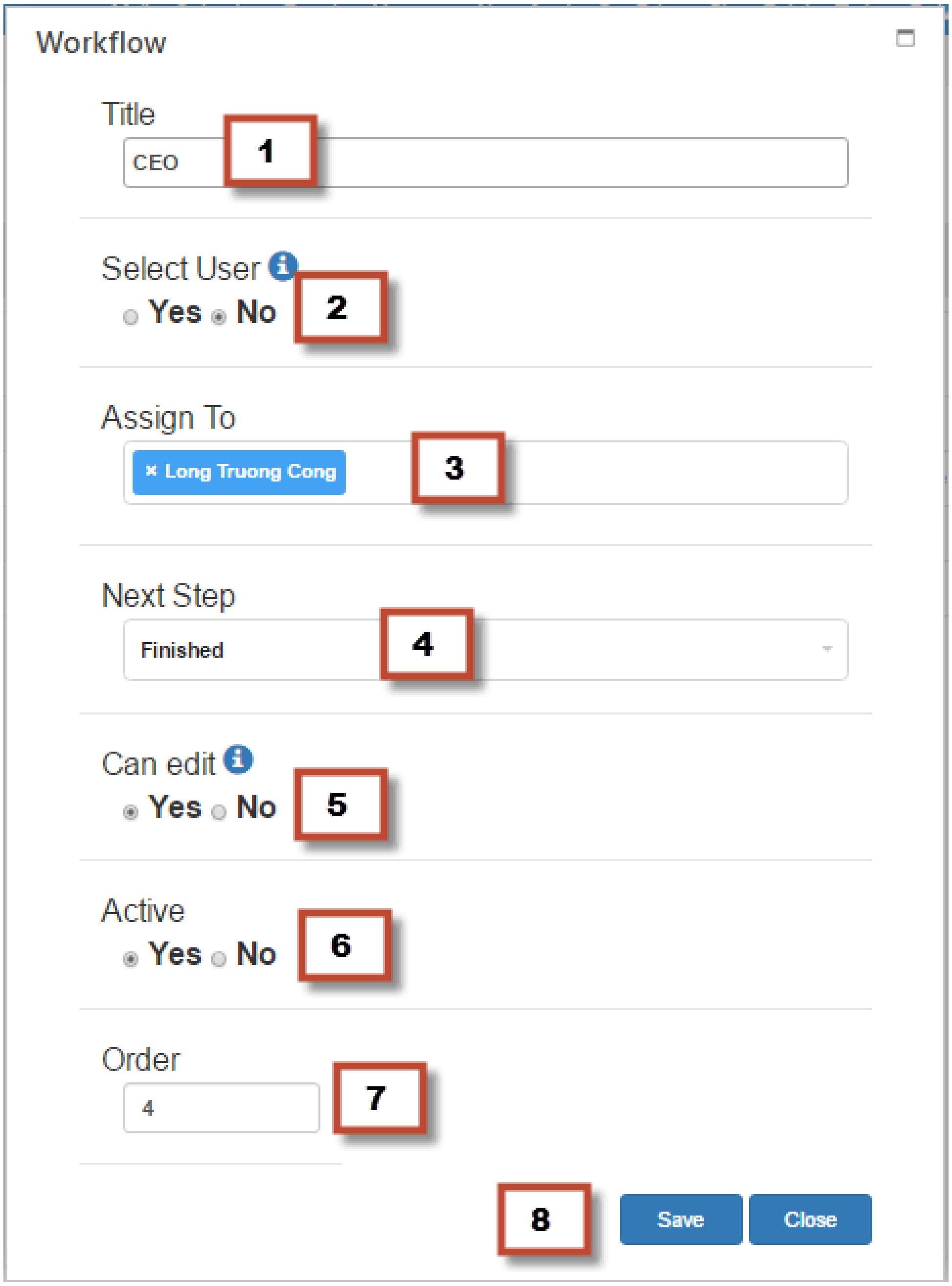
This step allows administrator to change the Workflow for consistent an organization.

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



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. Pease click **New**



- (**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.

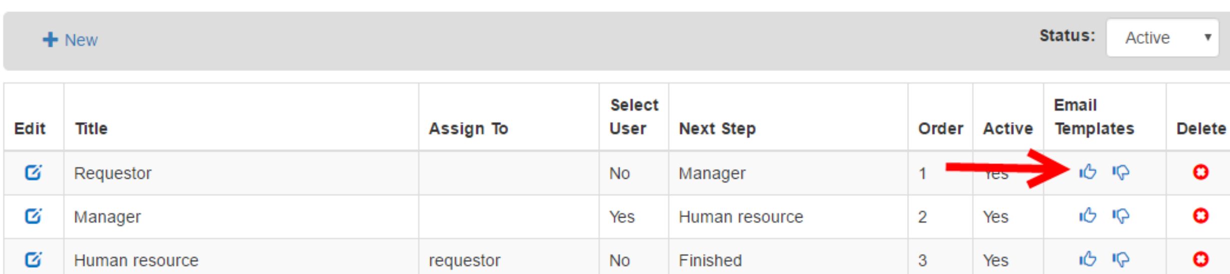
   Note

   - ➢ 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.

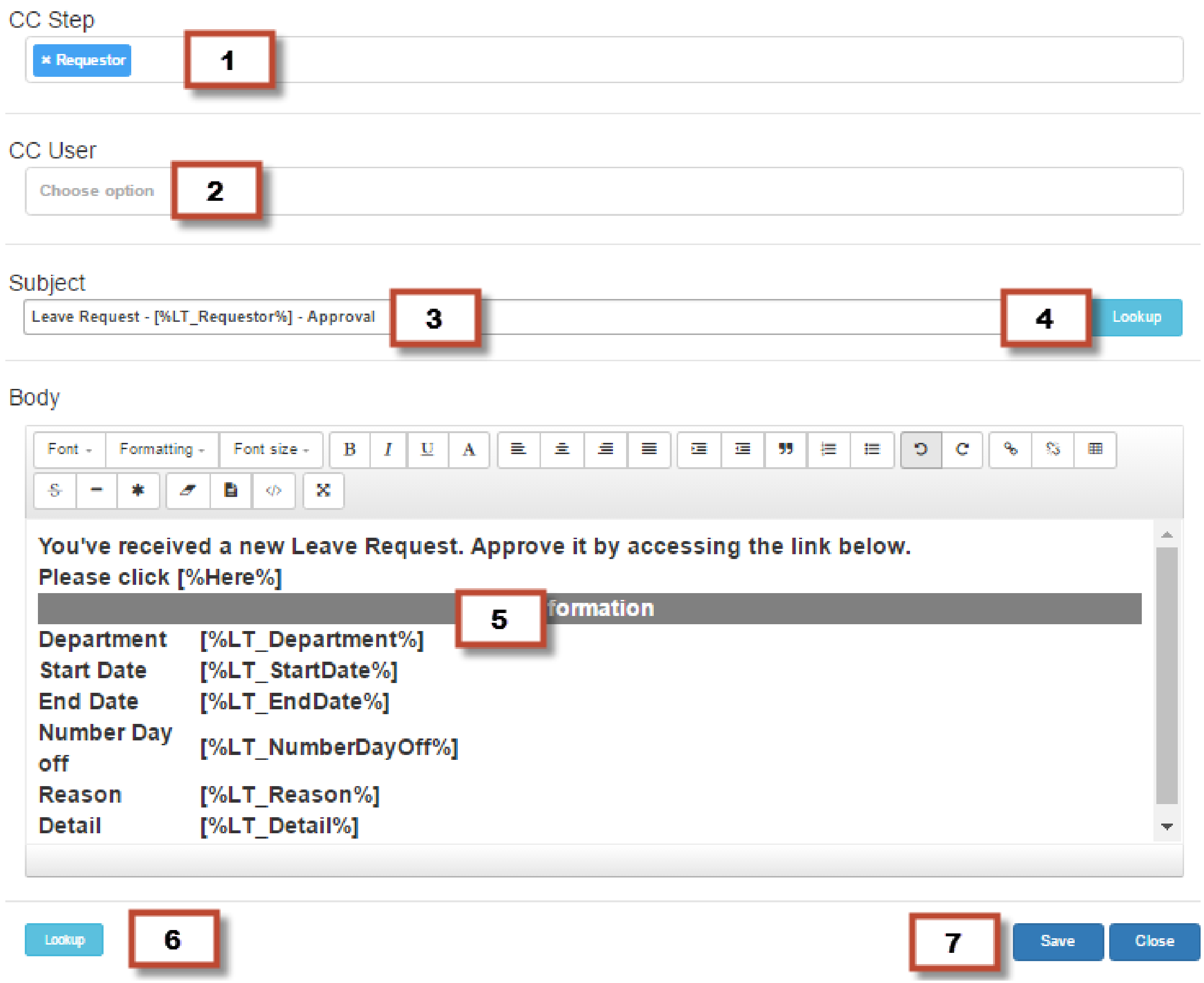
1. In left menu, click **Workflows.** Click **hand icon** to update an email template. **Hand up** is approval, **hand down** is reject



+ New   Status: Active

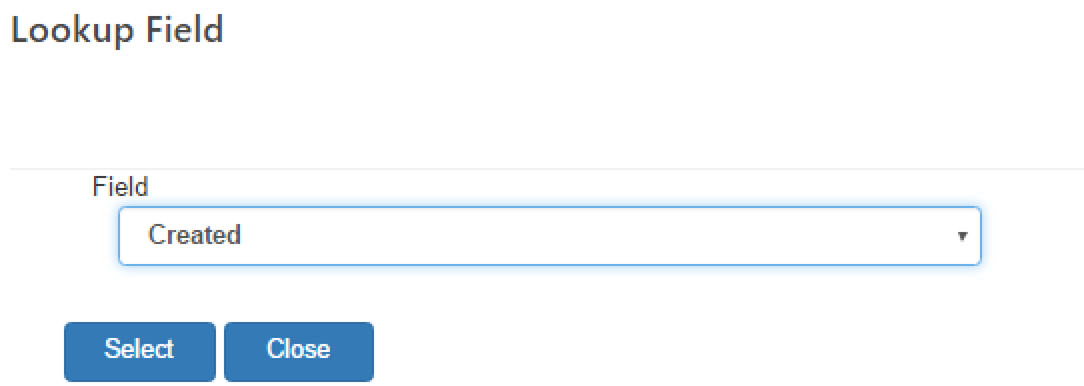
Edit	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
	Requestor		No	Manager	1	Yes		
	Manager		Yes	Human resource	2	Yes		
	Human resource	requestor	No	Finished	3	Yes		

2. Edit an email template



- (**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



Step 7: Setting up approval managers per department or user

There are 3 ways to set manager for the user

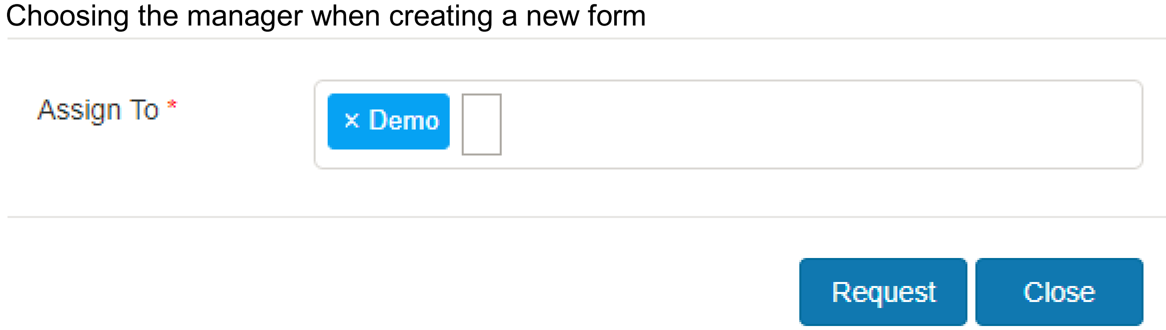
1. Choosing the manager (Assign To)
2. Setting manager for the department
3. Setting manager for the user

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

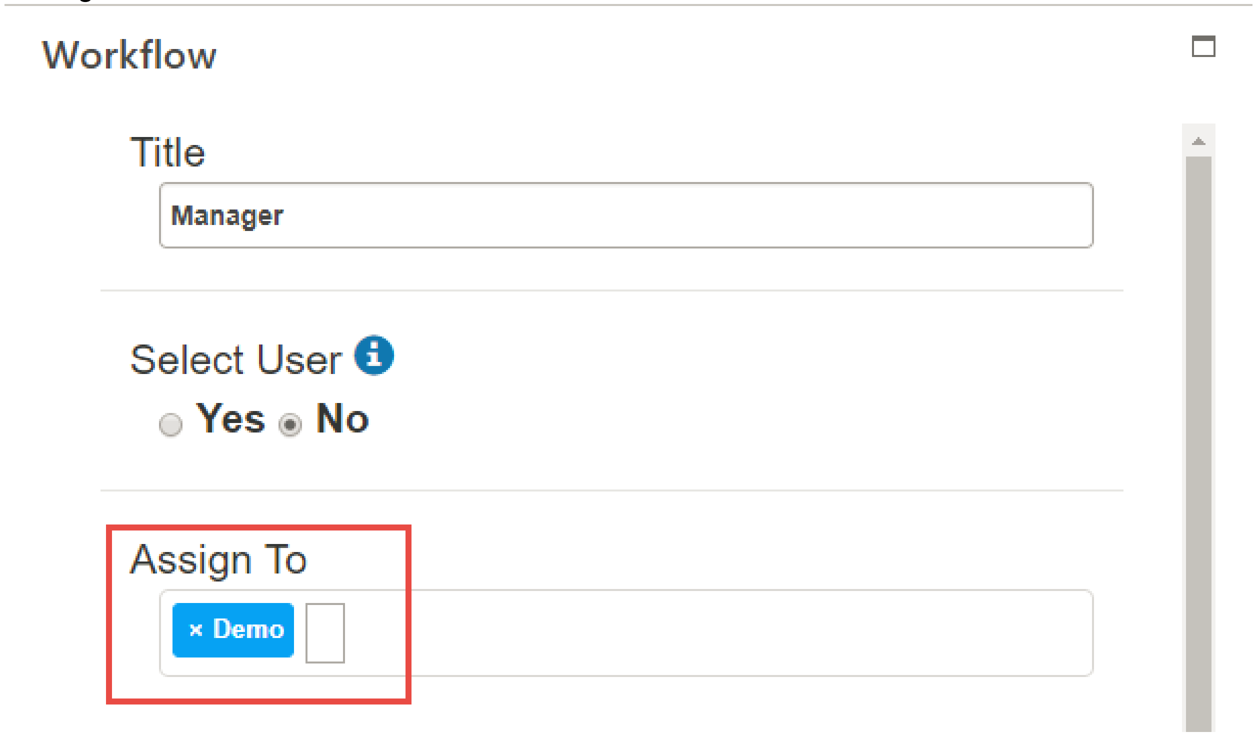
That way is the default way in the add-in. The configuration that go to the General Configuration page (Settings -> General Configuration) -> “Get manager” dropdown is “From Workflow”

That way has 2 options

1. Choosing the manager when creating a new form



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



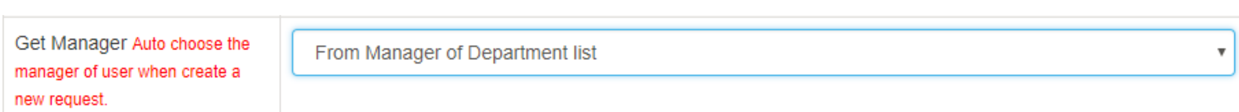
Setting manager for the department

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	
Infomation Technology	× Demo	Update
Human Resource	× LTAPPS Support	Update
Accounting	× Demo	Update

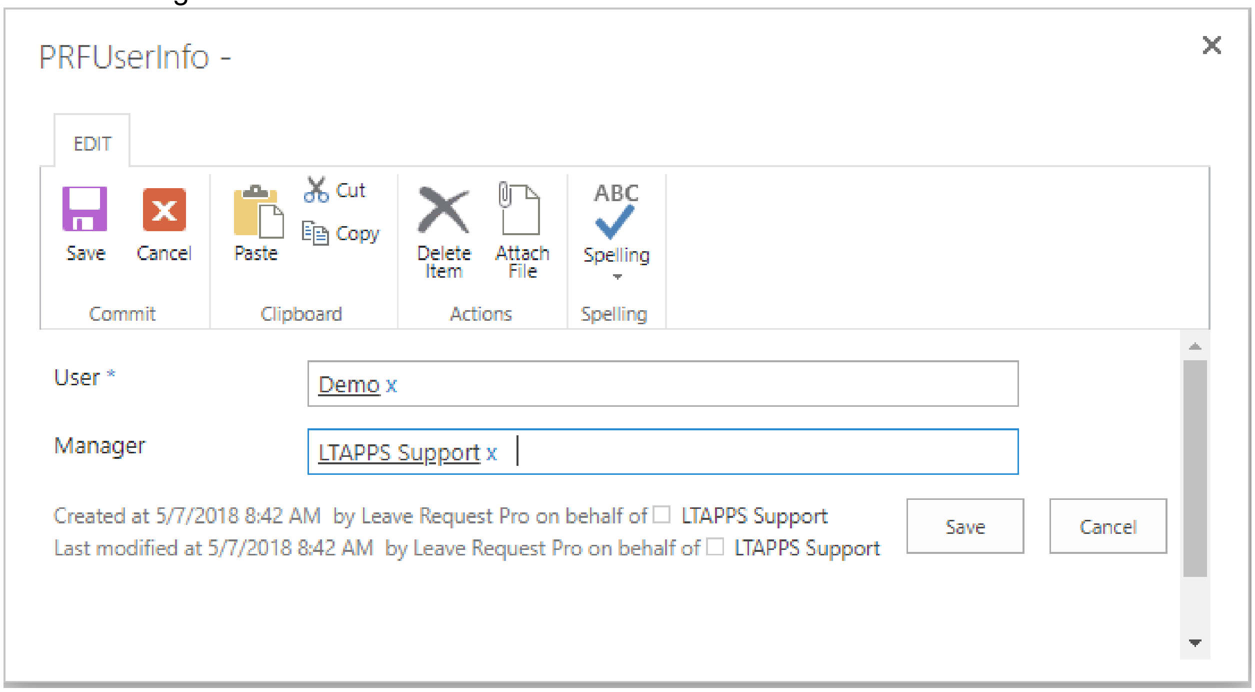
2. Going to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Manager of Department List"



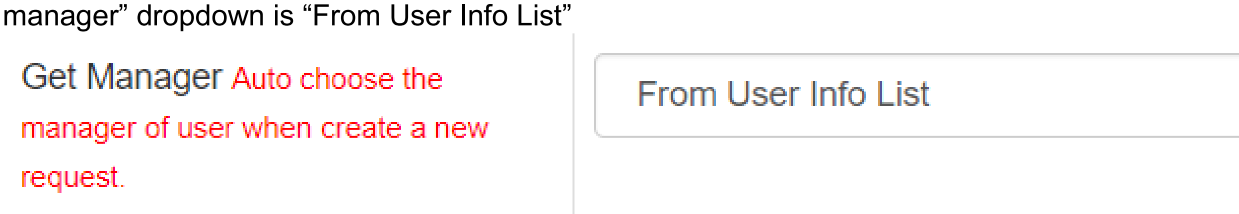
Setting manager for the user

The configuration has 2 steps

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



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

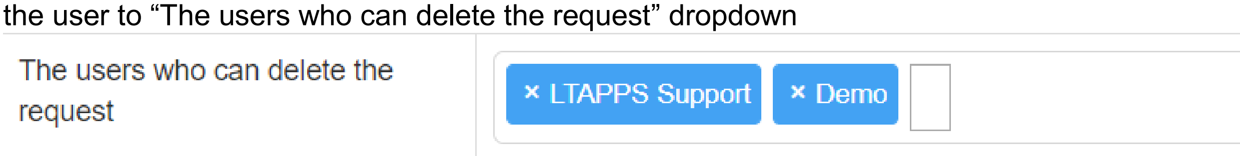


Step 8: Allows the user who can delete the request

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



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	Infomation Technology	05/07/2018 22:26	05/07/2018 22:26	1	Annual Leave	Human resource	Finished	
	LTAPPS Support	Infomation Technology	05/07/2018 22:30	05/07/2018 22:30	2	Sick Leave	Human resource	Finished	
	Demo	Infomation Technology	05/07/2018 22:38	05/07/2018 22:38	2	Annual Leave	Human resource	Finished	

Showing 1 to 3 of 3 entries

First Previous 1 Next Last