LTAPPS Approval Hub

User Guide

Version 1.0

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Detail	ID	Employee	Department	Submitted Date
⬈	🚀 FIS000015	Adele Vance	IT	December 25, 2023 17:37
⬈	🏠 DEE000014	Adele Vance	IT	December 25, 2023 17:37
⬈	✈ TRA000004	Adele Vance	IT	December 25, 2023 17:29
⬈	♻ CAP000006	Adele Vance	IT	December 25, 2023 17:30
⬈	👤 BUP000008	Adele Vance	IT	December 25, 2023 17:32

🏠 Home   ☰ My Requests   ☑ My Task (3)   🗐 **My Approval**   📊 Dashboard   ♻ Leads

🔍 Search

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LTAPPS Approval Hub

LTAPPS Approval Hub is a software solution that allows users to create, manage, and share approval requests from a centralized platform

Overview

LTAPPS Approval Hub is a software solution that allows users to create, manage, and share approval requests from a centralized platform. Approval requests are documents or tasks that require the consent or authorization of one or more approvers before they can be executed or completed. Examples of approval requests include purchase orders, expense reports, leave requests, contracts, invoices, and more.

LTAPPS Approval Hub app can benefit both employees and managers by simplifying the process of requesting and approving the request, reducing errors and delays, increasing transparency and accountability, and improving employee satisfaction and productivity.

Define the sale process to track the activities with the customer from having an appointment to the final settlement
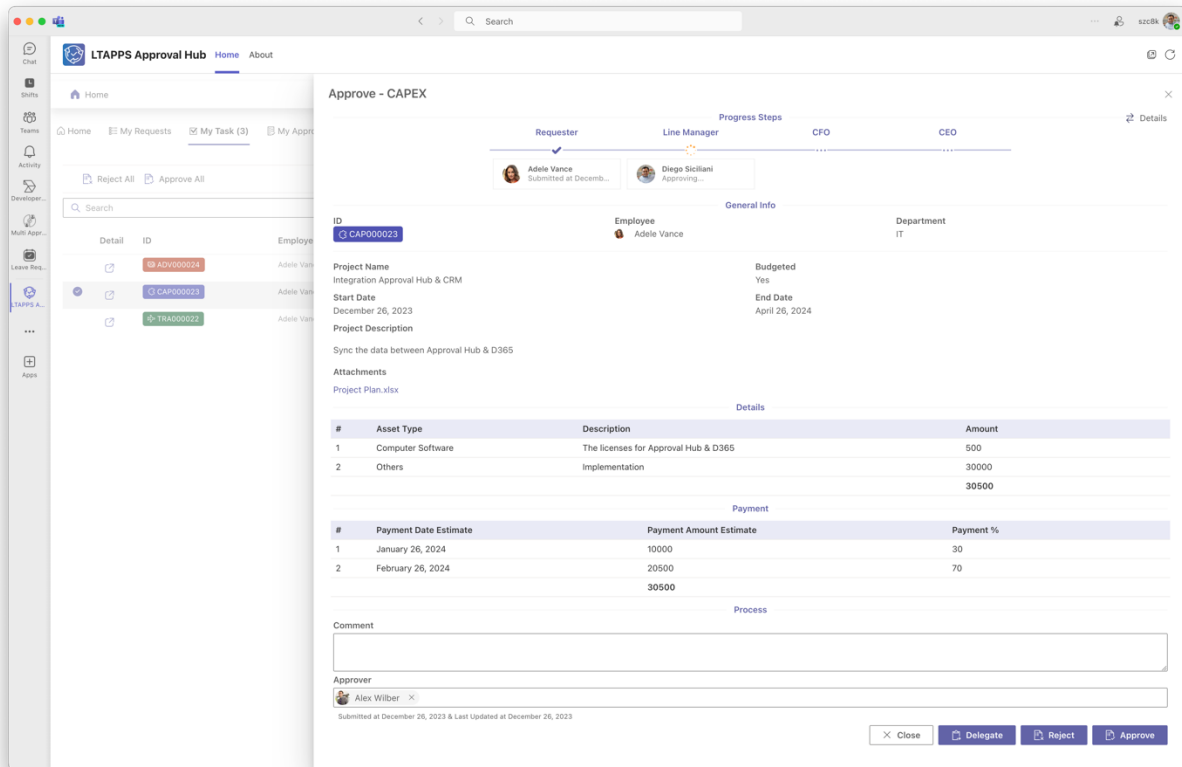
Can use the app via desktop, mobile, web app, or platforms such as O365 apps, SharePoint, or Microsoft Teams.

Open the App

You are able to open the app via:

- SharePoint
- MS Teams
- O365 Apps

## Via SharePoint

Follow the steps below:

- Open the O365 portal: https://www.office.com/?auth=2
- Log in with the Microsoft Account
- Open the SharePoint site where the app is installed.
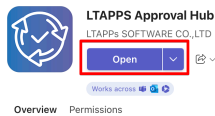- Open the SharePoint page where the web part is installed.

Via MS Teams

Follow the steps below:

- Open the MS Teams Desktop or MS Teams on the browser.

- Click on the Apps icon in the left navigation > Click on the Built for Your Org link. Then select the LTAPPS Approval Hub app.
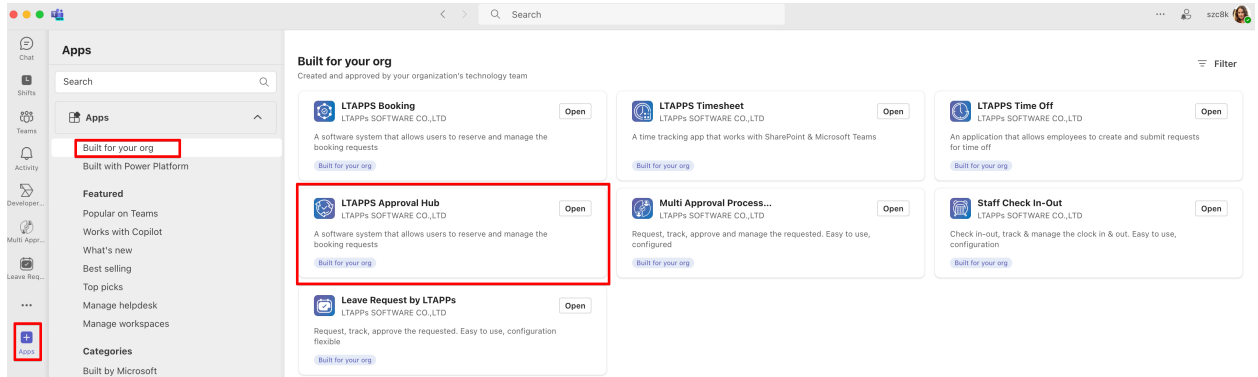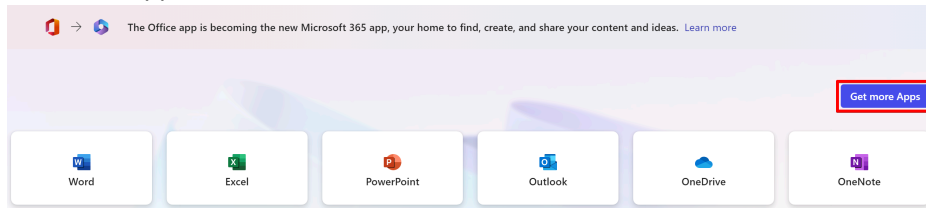

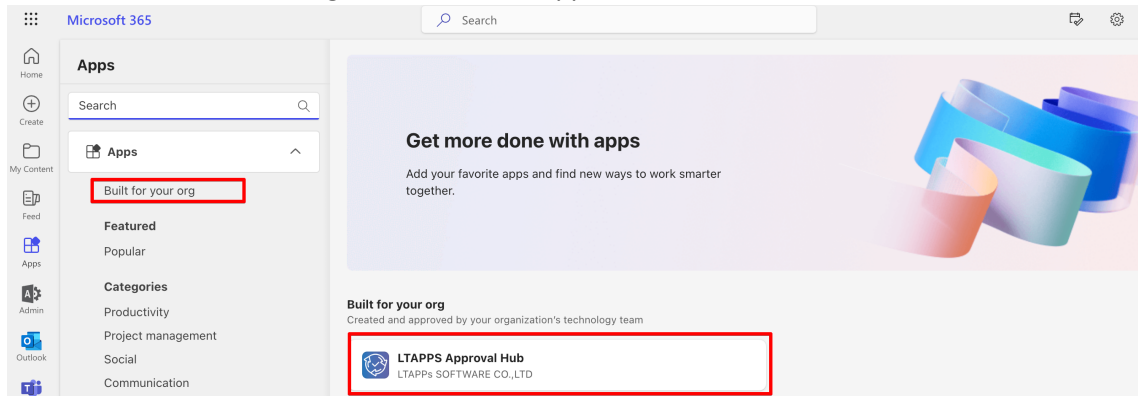- Then click on the Open button.

Via O365 Apps

Follow the steps below:

- Open the O365 Apps desktop or open the O365 portal on the browser.
- Click on the Apps icon in the left navigation > Click on the LTAPPS Approval Hub app icon under the Use Across Teams, Outlook, and Microsoft 365 section.
- If the app doesn't show under the Use Across Teams, Outlook, and Microsoft 365. Click on the Get more Apps button.

- Select the Built for Your Org link > Select the app.

- Then click on the Open button

Submit the Request

Follow the steps below:

- In the Home or My Request pages, click on the Submit a Request button.

- Or if the form is a sub-form, open a main request, the click on the Submit a Request

- In the request form in the right panel,
  - Select the department (The system auto-populates if your profile is set in the employee list)
  - Input all fields
  - Click on the Add Attachment link. In the popup that appears, select the file that you want to add.
- If you don't want to submit the request yet, click on the Save Draft button.
- Choose the next approver & click on the Submit button.

Approve/Reject the Request

Follow the steps below:

- Open the app, and switch to the My Task tab.
- In the List View, click on the View icon under the Detail column.

- In the Approval form of the right panel
- Review the request.

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o   Click on the Detail button at the right of the Progress Steps section to check more details of the information process.
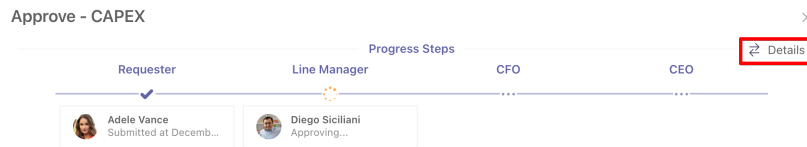
- Input the comment.
- Click on the Approve button if the request is okay for you.
- Click on the Reject button if the request needs to be updated.

For quick approval of the request without the comment, follow the steps below:

- In the List View, select the requests you want. Then click on the Approve All / Reject All buttons.
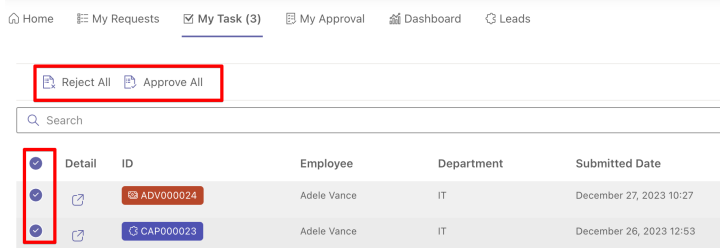
- If you approve more than 2 requests, a popup will show.
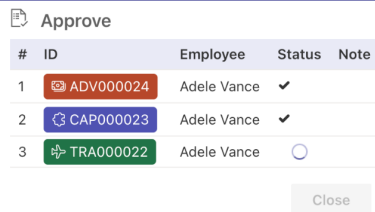
- If the request requires to select the next approvers, a popup will show.
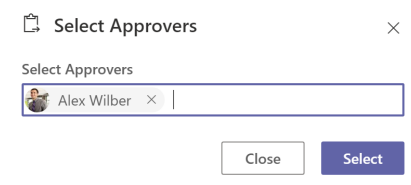
Delegate task

Follow the steps below

- In the Approval form, click on the Delegate button.

- In the delegate popup, select the person to whom the task delegates to.
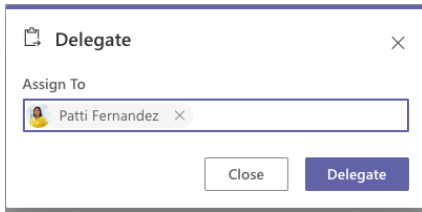
- Click on the Delegate button.

The administrator also can delegate the task from another to another. Follow the steps below:

- On the app, click on the All Features button > Click on the Searching card.
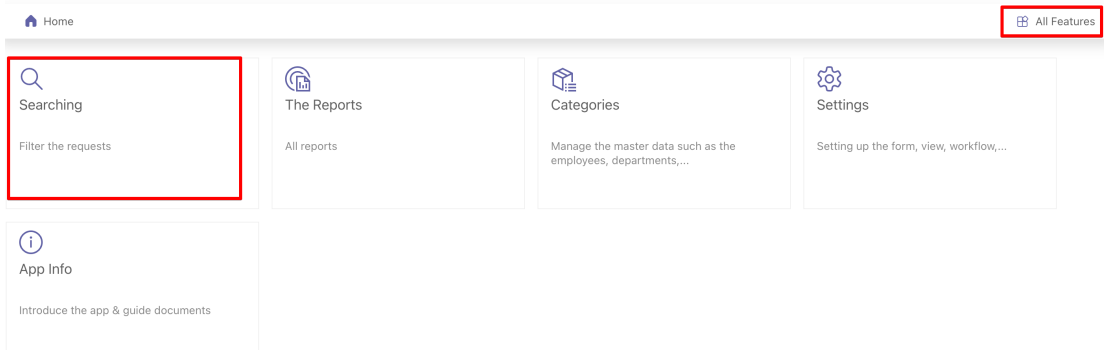
- Find the request that you want to delegate the task. Click on the ... icon > Delegate.
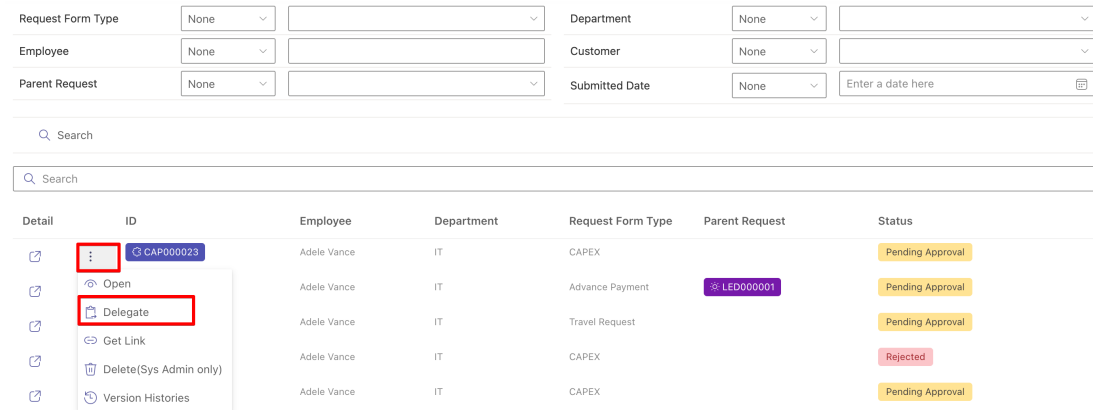
- In the delegate popup, select the person to whom the task delegates.
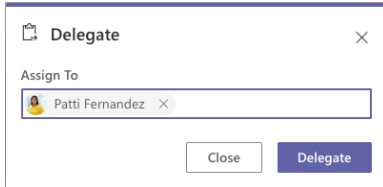
Submit on behalf of the employee

Follow the steps below:

- On the home page, click on the Submit a Request button.
- In the Employee dropdown field, select the employee you want to submit on behalf.
- Input the info.
- Click on the Submit button.

Note: The number of employees in the dropdown depended on the role of the current user

- Manager/Human Resource: Depended on the Manager/HR fields in the employees' list.

Edit the Request

If the request has been rejected & you want to edit this request. Follow the steps below:

- In the My Request or My Task tab, open the request.
- In the form that appears, changes the content. Then click on the Submit button again.

Add the Request to Outlook/MS Teams

Follow the steps below:

- Open the request form, and click on the Get Link button.

- Wait 15 seconds, a message shows to inform.
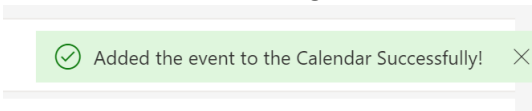
Print

Follow the steps below:

- Open the request form, and click on the Get Link button.

- Wait 15 seconds, a message shows to inform.
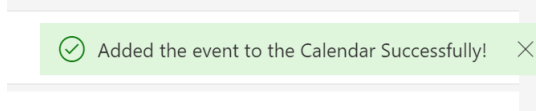
Note: Currently this feature only supports the app on SharePoint

Get the URL of the Request

Follow the steps below:

- Open the request form, and click on the Get Link button.

- Then click on the Get Link button
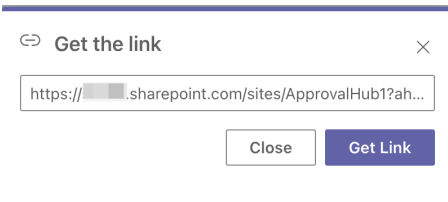
Delete the Request

If the request has been rejected & you want to delete this request. Follow the steps below:

- In the My Task tab, open the request.
- In the form that appears, click on the Delete button.

- In the Delete popup appearing, click on the Delete button. Wait some seconds to complete

The administrator/System admin also can delegate the task from another to another. The administrator only can delete the pending request. The sys admin can delete both the pending/complete request.

Follow the steps below:

- On the app, click on the All Features button > Click on the Searching card.

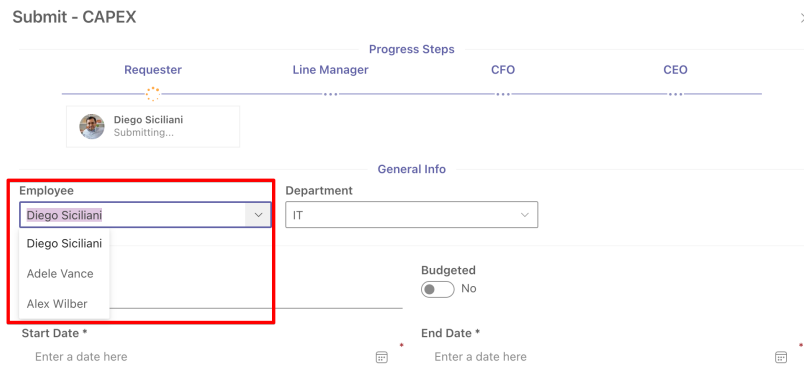|			
🔍 **Searching** Filter the requests	📊 **The Reports** All reports	📦 **Categories** Manage the master data such as the employees, departments,...	⚙️ **Settings** Setting up the form, view, workflow,...
ⓘ **App Info** Introduce the app & guide documents			

- Find the request that you want to delete. Click on the ... icon > Delete.

Request Form Type	None		Department	None	
Employee	None		Customer	None	
Parent Request	None		Submitted Date	None	Enter a date here 📅

🔍 Search

🔍 Search

Detail	ID	Employee	Department	Request Form Type	Parent Request	Status
↗	⋮ ⊙ CAP000023	Adele Vance	IT	CAPEX		Pending Approval
↗	👁 Open	Adele Vance	IT	Advance Payment	☀ LED000001	Pending Approval
↗	📋 Delegate	Adele Vance	IT	Travel Request		Pending Approval
↗	🔗 Get Link	Adele Vance	IT	CAPEX		Rejected
↗	🗑 Delete(Sys Admin only)	Adele Vance	IT	CAPEX		Pending Approval
	🕘 Version Histories					

- In the Delete popup appearing, click on the Delete button. Wait some seconds to complete.

Discussion Feature

Discussion   ✕

Hi Miriam Graham

The user guide of the LTAPPS Booking, please review

UserGuide.docx

Sent 2 minutes ago

Update the Delete section:

If the booking has been rejected & you want to delete this request. Follow the steps below:

- *In the My Task tab, open the request.*

- *In the form appears, click on the Delete button.*

- *In the Delete popup appearing, click on the Delete button. Wait some seconds to complete*

Miriam Graham
Sent seconds ago

📎   ➤

Discussion feature that allows to engage in a dialogue with other people about a specific topic or question.
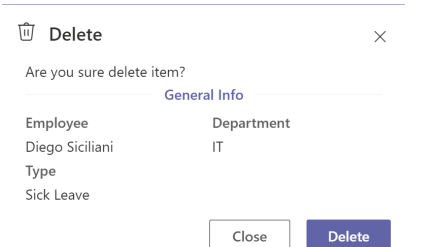
Follow the steps below:

- Open the Request form, and click on the Comment icon.

- Input the text into the Textbox (It supports the rich text), click on the attach icon & select the file.

- Then click on the Send icon.

Open/Close the request

The feature allows the user to submit the sub-form in the request. If the request is closed, no one can submit the sub-form

Follow the steps below:

- Open the My Request tab, click on the … icon > click on "Open/Close the request"

- Use the toggle to open or close

- Click on the Save button to save

The administrator/System admin also can set it up. Open the Search page > do the same above
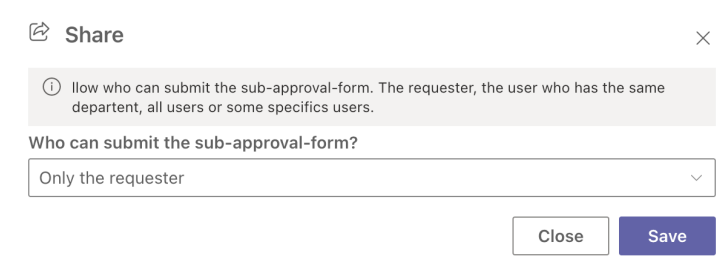
Share the request

The feature supports configuring the person who can submit the sub-form in the request

Follow the steps below:

- Open the My Request tab, click on the … icon > click on "Share"
- Use the dropdown to set

- Click on the Save button to save

  Note: The feature works if the re-share is true.

The administrator/System admin also can set it up. Open the Search page > do the same above

Views

Home

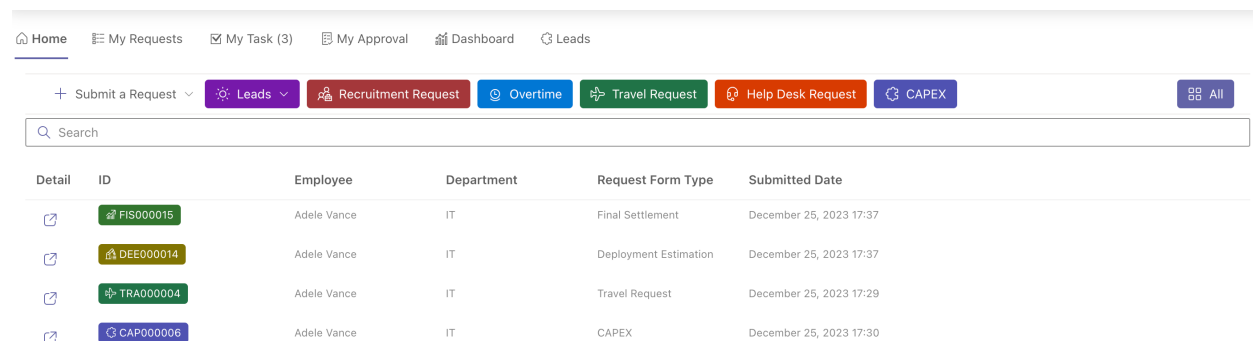To filter the requests by type, click on the button in the toolbar or click the All button to show all

To view the request, click on the request > click on the view button.

My Requests

	Home	My Requests	My Task (3)	My Approval	Dashboard	Leads

| + Submit a Request | ☀ Leads ⌄ | Recruitment Request | Overtime | Travel Request | Help Desk Request | CAPEX | | ▽ All ⌄ |

🔍 Search

Detail	ID	Request Form Type	Step	Status	Submitted Date	Approved Date
⧉	⋮ ☀ LED000025	Leads	Line Manager	Pending Approval	December 28, 2023 15:17	
⧉	Open	CAPEX	CFO	Pending Approval	December 26, 2023 12:53	
⧉	⌕ Open ⊝ Get Link	Advance Payment	CFO	Pending Approval	December 27, 2023 10:27	

To filter the requests by the type, click on the button in the toolbar or click the All button to show all

| ☀ Leads ⌄ | Recruitment Request | Overtime | Travel Request | Help Desk Request | CAPEX | | ▽ All ⌄ |

To filter the requests by the status

▽ All ⌄
⊞ All
☼ Pending Approval
⎔ Finished
⊖ Rejected

To view the request, click on the request > click on the view button.

Or click on … icon

Detail	ID
⧉	⋮ ☀ LED000025
⧉	⌕ Open
⧉	⊝ Get Link

My Tasks

	Home	My Requests	My Task (3)	My Approval	Dashboard	Leads

📄 Reject All   📄 Approve All

🔍 Search

✓	Detail	ID	Employee	Department	Submitted Date
✓	⧉	☀ LED000025	Adele Vance	IT	December 28, 2023 15:17
✓	⧉	CAP000021	Adele Vance	IT	December 26, 2023 11:36
✓	⧉	CAP000020	Adele Vance	IT	December 26, 2023 11:35
✓	⧉	TRA000019	Adele Vance	IT	December 25, 2023 18:27

My Approval

🔍 Search

Detail	ID	Employee	Department	Submitted Date
⧉	⚡ FIS000015	Adele Vance	IT	December 25, 2023 17:37
⧉	🏠 DEE000014	Adele Vance	IT	December 25, 2023 17:37
⧉	✈ TRA000004	Adele Vance	IT	December 25, 2023 17:29
⧉	◔ CAP000006	Adele Vance	IT	December 25, 2023 17:30
⧉	⚙ BUP000008	Adele Vance	IT	December 25, 2023 17:32

Dashboard

▽ All ∨   Oct   Nov   Dec   ⊞ All   🗓 Last 3 Months ∨

Summary   📊 ⊞

```
      1
   6
              18
```
🟩 Finished   🟨 Pending Approval   🟥 Rejected

By Month   📊 ⊞

```
28
                  25
21
14
 7
 0
      Oct   Nov   Dec
```
🟩 Finished   🟨 Pending Approval   🟥 Rejected

By Type   📊 ⊞

```
6

                                          4
4
              2             3                             2
2             1  1  1  1  1    1  1  1  1     1  1  1     1  1
0
    Lead… Cons… Recr… Busi… Over… Cont… Trav… Bidd… Help… Cont… Depl… CAPE… Cont… Depl… Fina… Adva… Cash… Paym…
```
🟩 Finished   🟨 Pending Approval   🟥 Rejected
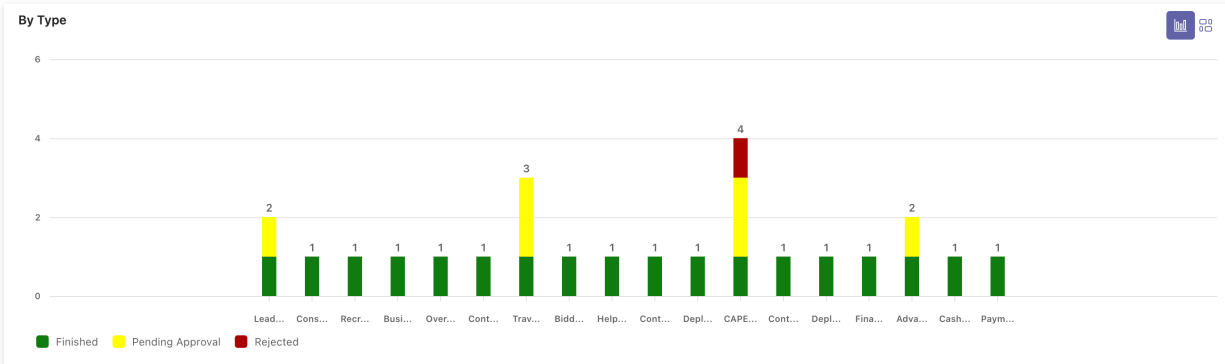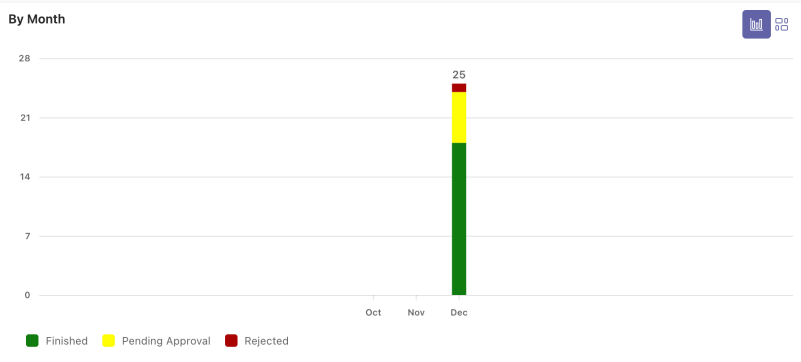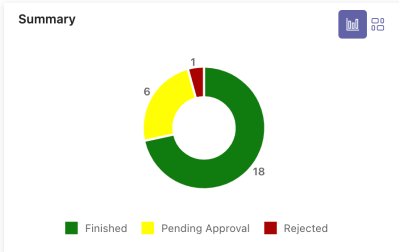
To filter by the form type, use the dropdown

All ⌄
All
Leads
Consultation Request
Recruitment Request
Business Project
Overtime
Contract Estimation
Travel Request
Bidding Documents Request
Help Desk Request
Contract
Deployment Request
CAPEX
Contract Performance Request
Deployment Estimation
Final Settlement
Advance Payment
Cash Advance Receipt
Payment Request

To change the year to filter, select the Month dropdown at the top right.

Oct   Nov   Dec   [⊞ All]   📅 Last 3 Months ⌄   📅 Year: 2023 ⌄
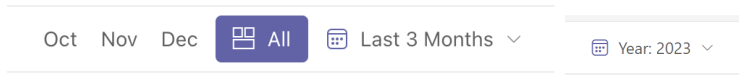
Use the chart & and component icons to switch the view.

View the requests list

Search
The view allows search requests by form type, department, employee, and status …

Request Form Type	None ▾	▾		Department	None ▾	▾
Employee	None ▾			Customer	None ▾	▾
Parent Request	None ▾	▾		Submitted Date	None ▾	Enter a date here 📅

🔍 Search

🔍 Search

Detail	ID	Employee	Department	Request Form Type	Parent Request	Status
↗ ⋮	☀ LED000025	Adele Vance	IT	Leads		Pending Approval
↗ ⋮	⏱ CAP000023	Adele Vance	IT	CAPEX		Pending Approval
↗ ⋮	☒ ADV000024	Adele Vance	IT	Advance Payment	☀ LED000001	Pending Approval
↗ ⋮	✈ TRA000022	Adele Vance	IT	Travel Request		Pending Approval

To filter the requests, select the conditions dropdown & click on the Search button

Click on the … icon to select more actions such as view the request, get the link,…

Detail	ID	Employee
↗	⋮ ☀ LED000025	Adele Vance
↗	👁 Open	Adele Vance
↗	📋 Delegate	Adele Vance
↗	🔗 Get Link	Adele Vance
↗	🗑 Delete(Sys Admin only)	Adele Vance
	🕘 Version Histories	

The Reports

☀ Lead Report: Details	☀ Lead Report: Sub Requests	👥 Recruitment Request Report: Details	🕐 Overtime Report: Details
Show the Lead requests	Show the sub-requests of the lead	Show the Recruitment requests	Show the Overtime requests

✈ Travel Request Report: Details	🎧 Help Desk Request Report: Details	🧩 CAPEX Report: Details	👥 Consultation Request Report: Details
Show the Travel Request request	Show the Help Desk Requests	Show the CAPEX request	Show the Consultation Request requests

The report shows the details of the request.

The Reports > Business Project Report: Details

| Department | None ▾ | ▾ | Employee | None ▾ | |
| Customer | None ▾ | ▾ | Parent Request | None ▾ | ▾ |

📄 Report   Download as XLS

#	ID	Employee	Department	Customer	(Business Project - Total Revenue) Estimation	(Business Project - Cost of Goods Sold) Estimation	(Business Project - Total Cost) Estimation	(Business Project - Profit) Estimation	Parent Request
1	BUP000008	Adele Vance	IT	Client Service Department	1	2	3	4	LED000008

Follow the steps below:

- Open the app, click on the All Features button at the right top
- In the All Features page, click on The Reports card, select the report
- Select the filters,…
- Click on the Report button to trigger. Wait some seconds for the data loading
- Click on the Download as XLS button to export to an Excel file