



MULTI APPROVAL PROCESS

User guide

Version 2.1



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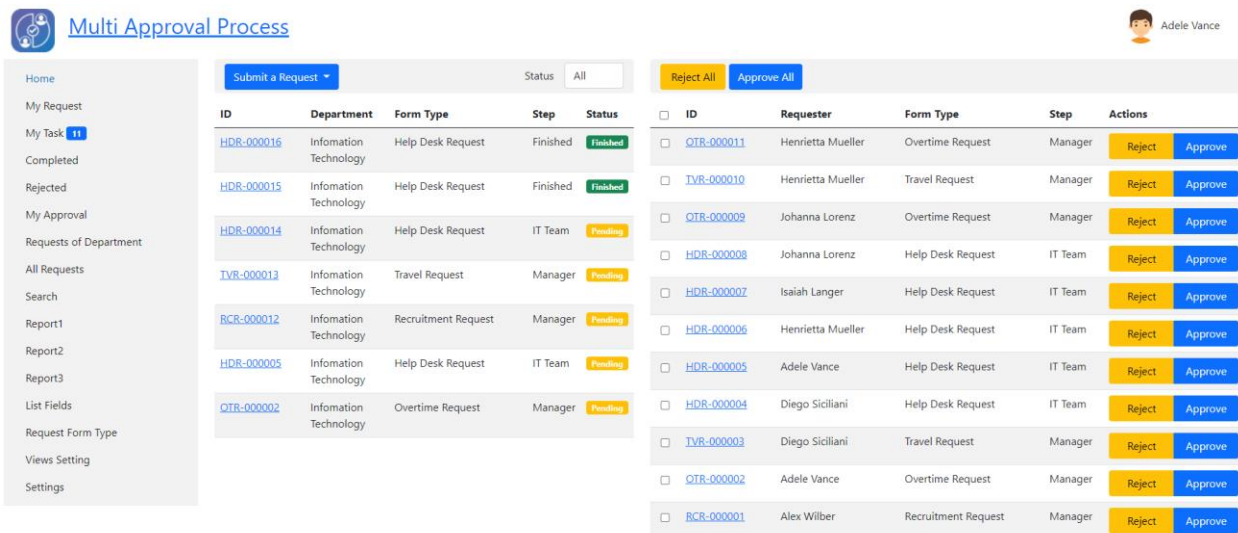
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Multi Approval Process for SharePoint

Request, track, approve and manage the requested. Easy to use, configured, and very flexible

Overview

The Multi Approval Process is the add-in in SharePoint, Microsoft Team & Microsoft Outlook. It supports the organization and creates a lot of approval systems without coding. It allows the creation of unlimited approval systems, and unlimited workflows, and changes anything in the system for consistency with your organization. End users easy to create & manage the request. It provides all information to help the manager makes the approval. It is also a SharePoint Hosted add-in, all data of the add-in saves on your SharePoint site. Very easy to use, configuration.



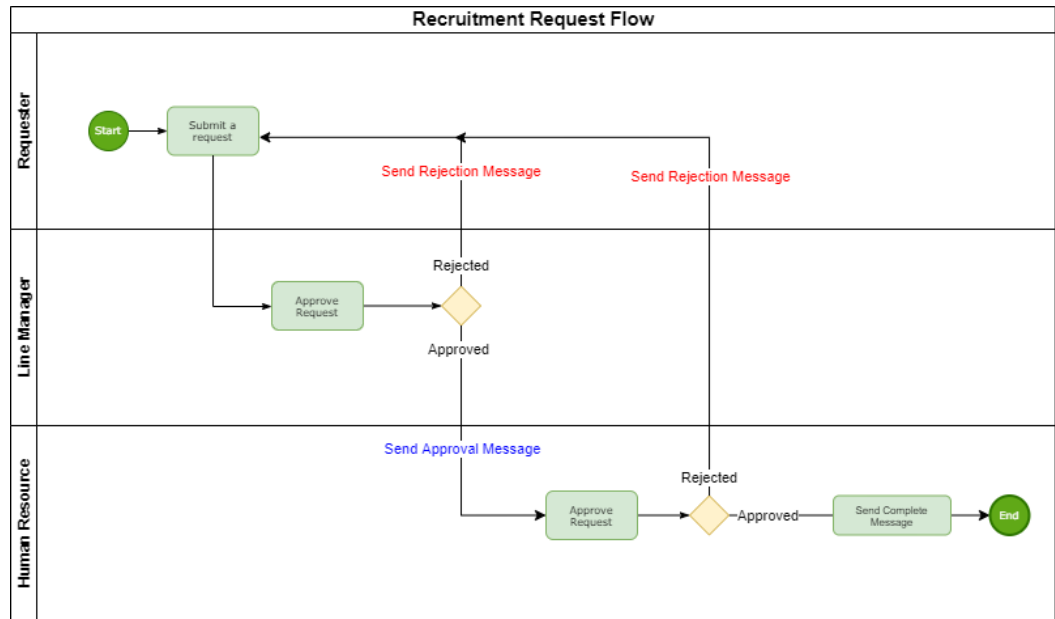
Multi Approval Process

Submit a Request | Status: All | Reject All | Approve All

ID	Department	Form Type	Step	Status	ID	Requester	Form Type	Step	Actions	
HDR-000016	Information Technology	Help Desk Request	Finished	Finished	<input type="checkbox"/>	QTR-000011	Henrietta Mueller	Overtime Request	Manager	Reject Approve
HDR-000015	Information Technology	Help Desk Request	Finished	Finished	<input type="checkbox"/>	TVR-000010	Henrietta Mueller	Travel Request	Manager	Reject Approve
HDR-000014	Information Technology	Help Desk Request	IT Team	Pending	<input type="checkbox"/>	QTR-000009	Johanna Lorenz	Overtime Request	Manager	Reject Approve
TVR-000013	Information Technology	Travel Request	Manager	Pending	<input type="checkbox"/>	HDR-000008	Johanna Lorenz	Help Desk Request	IT Team	Reject Approve
RCR-000012	Information Technology	Recruitment Request	Manager	Pending	<input type="checkbox"/>	HDR-000007	Isaiah Langer	Help Desk Request	IT Team	Reject Approve
HDR-000005	Information Technology	Help Desk Request	IT Team	Pending	<input type="checkbox"/>	HDR-000006	Henrietta Mueller	Help Desk Request	IT Team	Reject Approve
QTR-000002	Information Technology	Overtime Request	Manager	Pending	<input type="checkbox"/>	HDR-000005	Adele Vance	Help Desk Request	IT Team	Reject Approve
					<input type="checkbox"/>	HDR-000004	Diego Siciliani	Help Desk Request	IT Team	Reject Approve
					<input type="checkbox"/>	TVR-000003	Diego Siciliani	Travel Request	Manager	Reject Approve
					<input type="checkbox"/>	QTR-000002	Adele Vance	Overtime Request	Manager	Reject Approve
					<input type="checkbox"/>	RCR-000001	Alex Wilber	Recruitment Request	Manager	Reject Approve

Currently, the add-in has 4 default approval systems

1. Recruitment Request: Finding and hiring the best and most qualified candidate for a job opening, in a timely and cost-effective manner
 - o Workflow



○ Layout

Todo

[Edit](#) [Information Processing](#)

Job Title *

Pay Grade

Department *

Direct Report To *

Cost Center *

Number Of People Required *

Term Of Contract(Months) *

What is the purpose of job?

Competencies *

Specify your own value

Salary *

Key Success Factors

Year Of Experience Required *

Special Qualification

Approver *

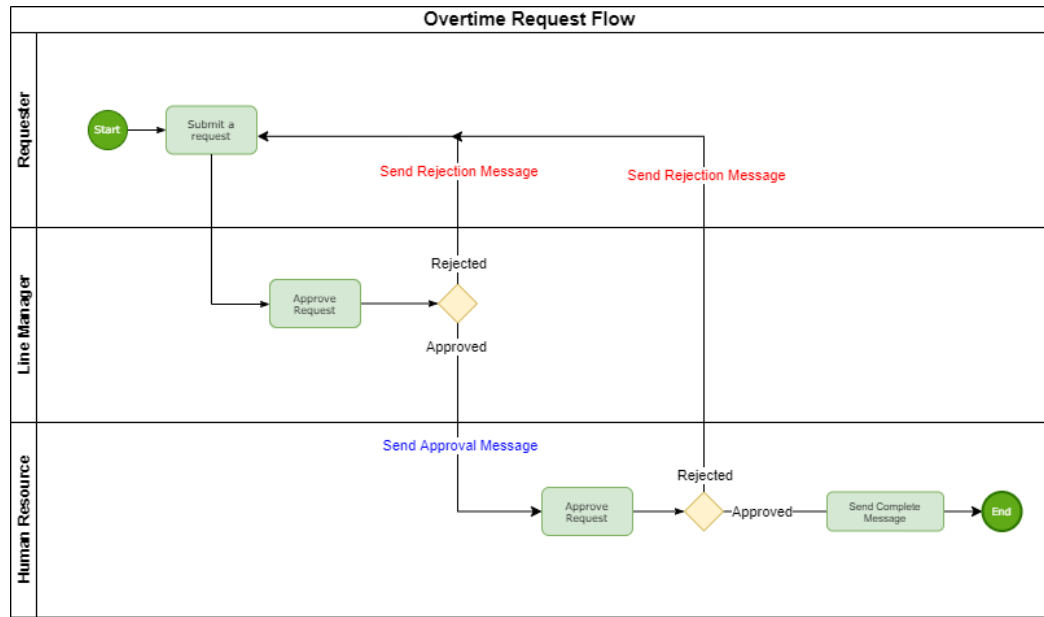
Todo

[View](#) [Information Processing](#)

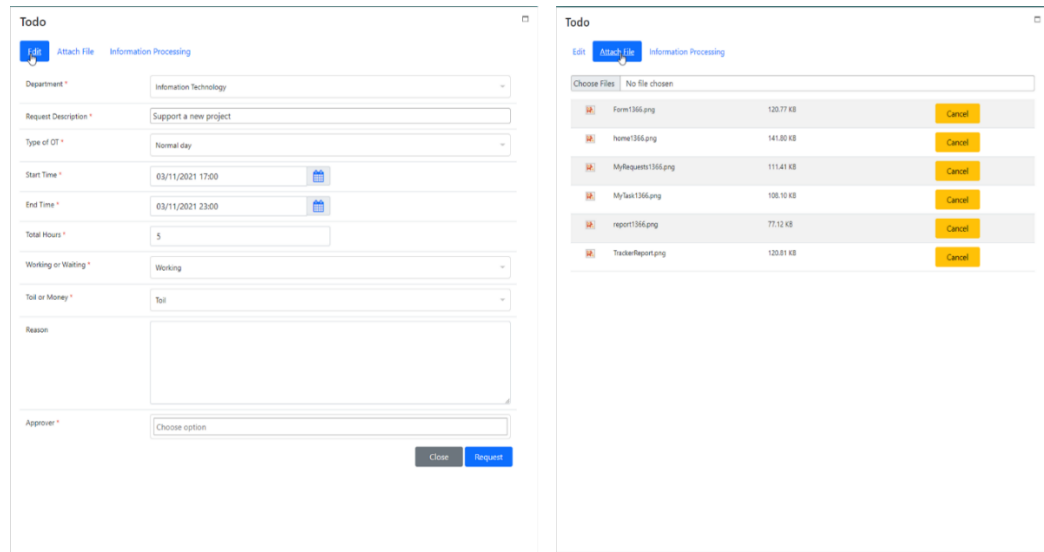
Date Modified	Approved By	Stage	Status	Comment
03/11/2021	Ella	Requester	Done	
03/11/2021	William	Manager	Done	
03/11/2021	James	Human resource	Pending	

2. Overtime Request: Supports users to request overtime in the organization

○ Workflow

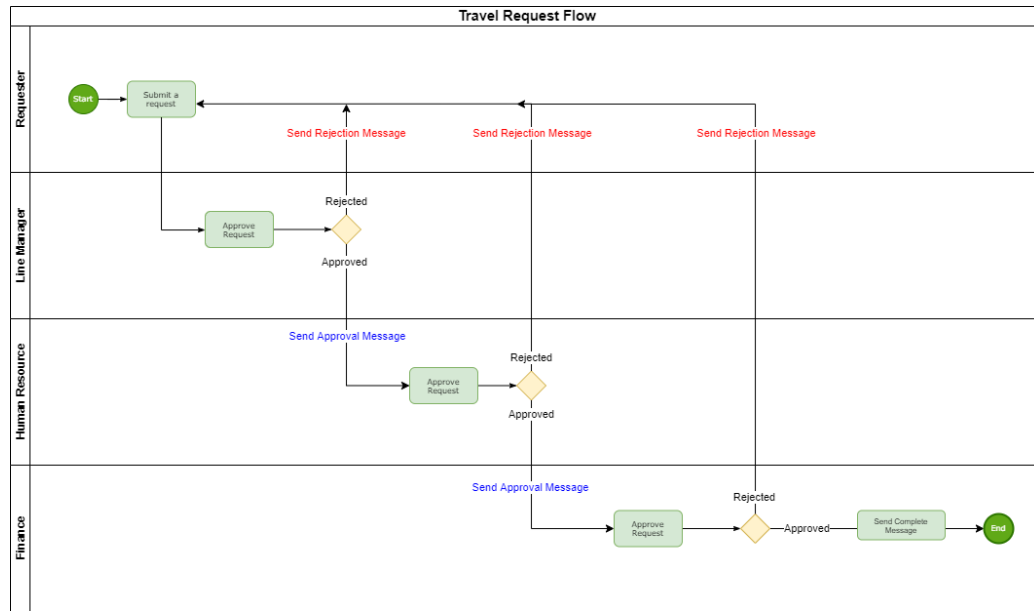


○ Layout



3. Travel Request: Handling of the request and approval process of business trips

○ Workflow



o Layout

Todo

Employee ID *

Title *

Department *

Destination *

Departure *

Return *

Total Days *

Purpose

Notes

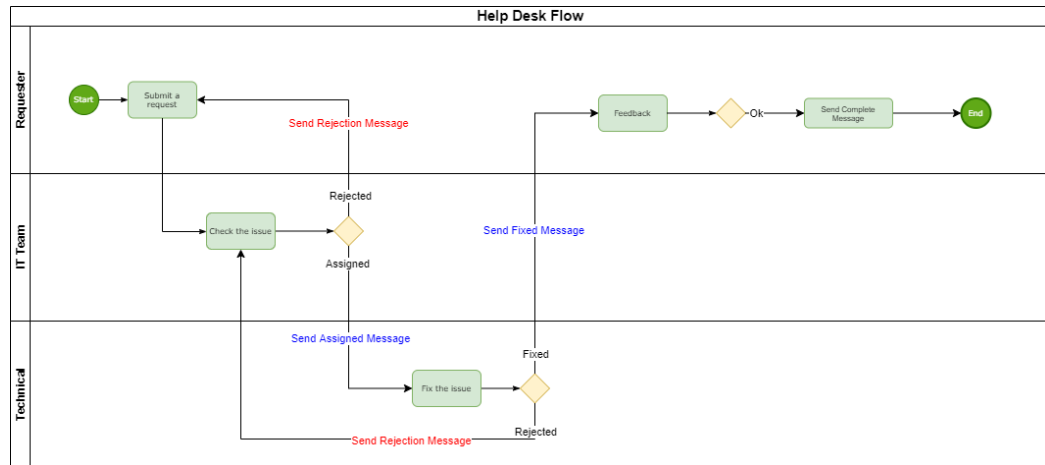
Approver *

Todo

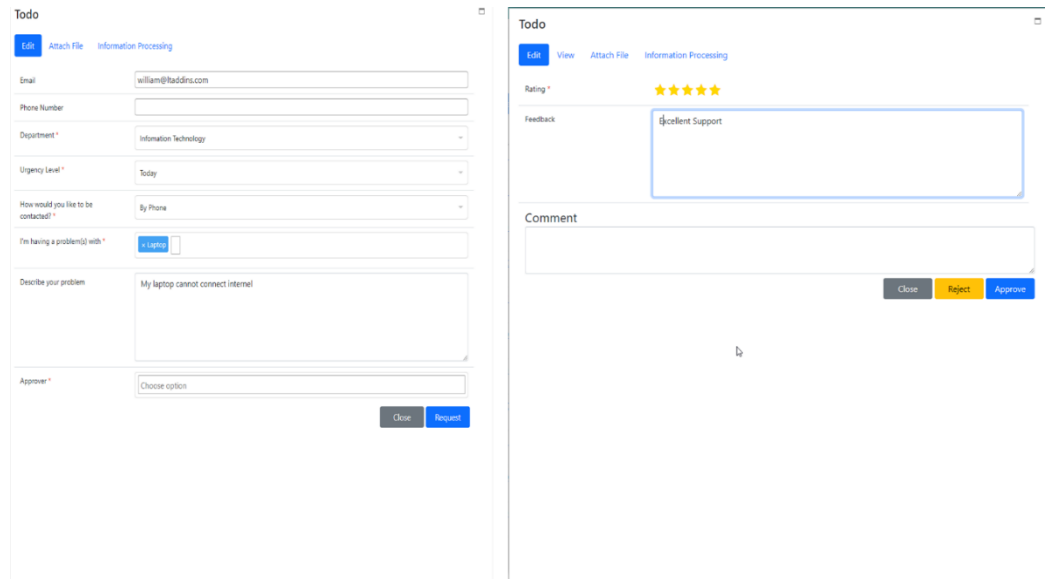
#	Type of Expense	Description	Budget	Qty	Units	Total
1	Airfare	London -> HongKong HongKong -> London	1,000	500	2	1,000
2	Local Transportation	Airport -> Hotel Hotel -> Airport Others	500	150	3	450
3	Hotel	8 days	1,000	100	8	800
4	Meal	8 days	700	70	8	560
5	Entertainment		500	500	1	500
6	Other		500	400	1	400
Sum:						3,710

4. Help Desk Request: Resolve end-user issues efficiently by simply automating the complaint resolution process with ticket management

o Workflow

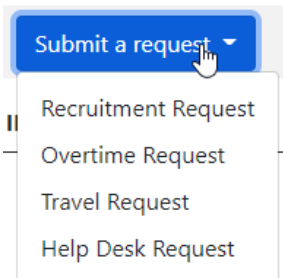


o Layout



Submit a request

1. Open the app, click the **home** or **my request** link in the left menu
2. Click the button **Submit a request**, then select the request type that wants to submit



3. Input all fields & click the **Request** button

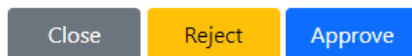


Approve/Reject a request

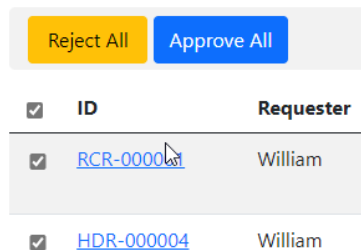
1. Open the app, click the **home** or **my task** link in the left menu
2. Click the link in the ID column to open the form



3. When the request form appears, review all information & click the **Approve** or **Reject** button
 - a. Click the **View** tab to know the main info
 - b. Click the **Information Process** tab to know the history of the process
 - c. Click the **Attach Files** to see the files



4. To quickly Approve/Reject the request without opening the request form. Click the button **Approve/Reject** button at the right of the table
5. To approve/reject multi requests
 - a. Select the request you want to approve/reject but check the checkbox. If you want to select all requests, click the check at the header of the table
 - b. Then click the **Approve All/Reject All**



<input checked="" type="checkbox"/>	ID	Requester
<input checked="" type="checkbox"/>	RCR-000001	William
<input checked="" type="checkbox"/>	HDR-000004	William

Cancel the request

1. Open the app, click the **home** or **my request** link in the left menu
2. Click the **delete icon** at the right of the table

Step	Delete
Manager	
IT Team	
Manager	
Manager	
Feedback	
Requester	
Requester	
Human resource	

View my request

1. Open the app, click the **home** or **my request** link in the left menu
2. Click the link in the ID column to view detail of the request
3. Click the Status field at the right top to filter requests by status
4. If you want to use the search function, use the search textbox

Submit a request Status: Pending

Show 10 entries Search:

ID	Department	Form Type	Step	Delete
RCR-000009	Information Technology	Recruitment Request	Manager	
HDR-000008	Information Technology	Help Desk Request	IT Team	
OTR-000006	Information Technology	Overtime Request	Manager	
RCR-000005	Information Technology	Recruitment Request	Manager	
HDR-000004	Information Technology	Help Desk Request	Feedback	
TVR-000003	Information Technology	Travel Request	Requester	
OTR-000002	Information Technology	Overtime Request	Requester	
RCR-000001	Information Technology	Recruitment Request	Human resource	

View My tasks

1. Open the app, click the **home** or **my task** link in the left menu
2. If want to use the search function, use the search textbox at the right top of the table

Reject All Approve All

Show 10 entries Search:

ID	Requester	Form Type	Created	Step	Comment	Actions
RCR-00001	William	Recruitment Request	03/11/2021 15:51	Human resource	<input type="text"/>	Reject Approve
HDR-00004	William	Help Desk Request	03/11/2021 16:00	Feedback	<input type="text"/>	Reject Approve
QTR-00002	William	Overtime Request	03/11/2021 15:52	Requester		
TVR-00003	William	Travel Request	03/11/2021 15:59	Requester		
QTR-00019	Avery	Overtime Request	03/11/2021 16:16	Manager	<input type="text"/>	Reject Approve
TVR-00018	Jackson	Travel Request	03/11/2021 16:16	Manager	<input type="text"/>	Reject Approve
QTR-00017	Jackson	Overtime Request	03/11/2021 16:15	Manager	<input type="text"/>	Reject Approve
HDR-00015	Evelyn	Help Desk Request	03/11/2021 16:14	IT Team	<input type="text"/>	Reject Approve
TVR-00014	Mason	Travel Request	03/11/2021 16:14	Manager	<input type="text"/>	Reject Approve
QTR-00013	Harper	Overtime Request	03/11/2021 16:13	Manager	<input type="text"/>	Reject Approve

Showing 1 to 10 of 11 entries

First Previous 1 2 Next Last

View all completed requests

1. Open the app, click the **completed** link in the left menu
2. If you want to use the search function, use the search textbox at the right top of the table

Show 10 entries Search:

ID	Department	Form Type	Created
TVR-00007	Information Technology	Travel Request	03/11/2021 16:06
RCR-00010	Information Technology	Recruitment Request	03/11/2021 16:08
QTR-00011	Information Technology	Overtime Request	03/11/2021 16:08

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

View all rejected requests

1. Open the app, click the **Rejected** link in the left menu
2. If you want to use the search function, use the search textbox at the right top of the table

Show 10 entries Search:

ID	Department	Form Type	Created
QTR-00002	Information Technology	Overtime Request	03/11/2021 15:52
TVR-00003	Information Technology	Travel Request	03/11/2021 15:59

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

View all approved requests

1. Open the app, click the **My Approval** link in the left menu
2. If you want to use the search function, use the search textbox at the right top of the table

Show entries Search:

ID	Requester	Form Type	Created	Step	Status
RCR-000016	Ella	Recruitment Request	03/11/2021 16:15	Human resource	Pending
HDR-000004	William	Help Desk Request	03/11/2021 16:00	Feedback	Pending
TVR-000003	William	Travel Request	03/11/2021 15:59	Requester	Pending
QTR-000011	William	Overtime Request	03/11/2021 16:08	Human resource	Finished
HDR-000008	William	Help Desk Request	03/11/2021 16:06	IT Team	Pending
TVR-000007	William	Travel Request	03/11/2021 16:06	Finance	Finished
QTR-000006	William	Overtime Request	03/11/2021 16:05	Manager	Pending
QTR-000002	William	Overtime Request	03/11/2021 15:52	Requester	Pending

Showing 1 to 8 of 8 entries First Previous **1** Next Last

View all requests of all employees

1. Open the app, click the **All Requests** link in the left menu
2. Select the requester field for filter requests by the requester
3. Select the status field for filter requests by status

Requester: Status:

Show entries Search:

ID	Department	Form Type	Requester	Created	Stage
RCR-000016	Information Technology	Recruitment Request	Ella	03/11/2021 16:15	Human resource
RCR-000001	Information Technology	Recruitment Request	William	03/11/2021 15:51	Human resource
HDR-000004	Information Technology	Help Desk Request	William	03/11/2021 16:00	Feedback
QTR-000002	Information Technology	Overtime Request	William	03/11/2021 15:52	Requester
TVR-000003	Information Technology	Travel Request	William	03/11/2021 15:59	Requester
QTR-000019	Information Technology	Overtime Request	Avery	03/11/2021 16:16	Manager
TVR-000018	Information Technology	Travel Request	Jackson	03/11/2021 16:16	Manager
QTR-000017	Information Technology	Overtime Request	Jackson	03/11/2021 16:15	Manager
HDR-000015	Information Technology	Help Desk Request	Evelyn	03/11/2021 16:14	IT Team
TVR-000014	Information Technology	Travel Request	Mason	03/11/2021 16:14	Manager

Showing 1 to 10 of 16 entries First Previous **1** 2 Next Last

Search the requests

1. Open the app, click the **Search** link in the left menu
2. Select filters & click the **Search** button

Field Name	Operator	Value
Department	Equal	Infomation Technology
Created	None	

Refresh Search

Show 15 entries Search:

ID	Requester	Department	Form Type	Created	Stage	Status
RCR-000016	Ella	Infomation Technology	Recruitment Request	03/11/2021 16:15	Human resource	Pending
RCR-000001	William	Infomation Technology	Recruitment Request	03/11/2021 15:51	Human resource	Pending
HDR-000004	William	Infomation Technology	Help Desk Request	03/11/2021 16:00	Feedback	Pending
OTR-000002	William	Infomation Technology	Overtime Request	03/11/2021 15:52	Requester	Pending
TVR-000003	William	Infomation Technology	Travel Request	03/11/2021 15:59	Requester	Pending
OTR-000019	Avery	Infomation Technology	Overtime Request	03/11/2021 16:16	Manager	Pending
TVR-000018	Jackson	Infomation Technology	Travel Request	03/11/2021 16:16	Manager	Pending
OTR-000017	Jackson	Infomation Technology	Overtime Request	03/11/2021 16:15	Manager	Pending
HDR-000015	Evelyn	Infomation Technology	Help Desk Request	03/11/2021 16:14	IT Team	Pending

Show the report & export it to word, excel, or pdf file

1. Open the app, click the **Report** link in the left menu
2. Select filters & click the **report** button
3. Click icons at the right top to export the work, excel or pdf file

Field Name	Operator	Value
Department	None	
Created	None	

Refresh Report

Report Header Line 1 Report Header Line 2

ID	Requester	Department	Form Type	Stage	Status	Created
RCR-000016	Ella	Infomation Technology	Recruitment Request	Human resource	Pending	03/11/2021 16:15
RCR-000001	William	Infomation Technology	Recruitment Request	Human resource	Pending	03/11/2021 15:51
HDR-000004	William	Infomation Technology	Help Desk Request	Feedback	Pending	03/11/2021 16:00
OTR-000002	William	Infomation Technology	Overtime Request	Requester	Pending	03/11/2021 15:52
TVR-000003	William	Infomation Technology	Travel Request	Requester	Pending	03/11/2021 15:59
OTR-000019	Avery	Infomation Technology	Overtime Request	Manager	Pending	03/11/2021 16:16
TVR-000018	Jackson	Infomation Technology	Travel Request	Manager	Pending	03/11/2021 16:16
OTR-000017	Jackson	Infomation Technology	Overtime Request	Manager	Pending	03/11/2021 16:15
HDR-000015	Evelyn	Infomation Technology	Help Desk Request	IT Team	Pending	03/11/2021 16:14
TVR-000014	Mason	Infomation Technology	Travel Request	Manager	Pending	03/11/2021 16:14
OTR-000013	Harper	Infomation Technology	Overtime Request	Manager	Pending	03/11/2021 16:13
RCR-000012	James	Infomation Technology	Recruitment Request	Manager	Pending	03/11/2021 16:13
TVR-000007	William	Infomation Technology	Travel Request	Finance	Finished	03/11/2021 16:06