# Approval Hub (HR & Ops Suite)

## Administrator Guide

Version 2.0.3

Our Solutions Your Success

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# 1. Introduction & Admin Dashboard Overview

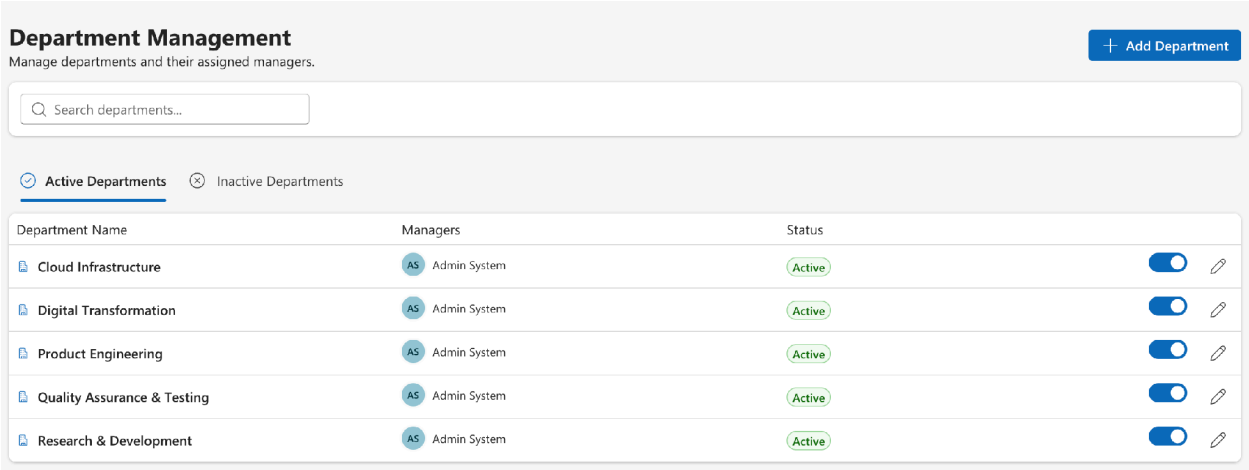
As an **App Administrator** (assigned the ApprovalHub-Administrator security role) and **System Administrator**, you are jointly responsible for managing the day-to-day business operational configurations of the platform.

While the core System Admin role explicitly handles infrastructure deployments, solution packaging, and raw database schemas, your operational focus within this guide centers on:

- Structuring corporate organizational and reporting boundaries.
- Configuring and maintaining environmental master data assets.
- Mapping data-driven dynamic workflow routing dependencies.
- Enforcing global Service Level Agreement (SLA) compliance policies.

# 2. Department Management

Departments function as the primary organizational boundaries within the application. They are used to isolate record visibility, determine operational ownership, and establish corporate reporting hierarchies. The system allows you to manage active listings or map multiple overseers to a single department node to handle complex authorization matrices.




## A. The Department Management Dashboard

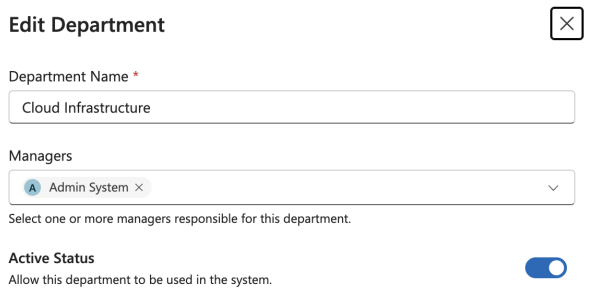
To oversee your organization's departmental registry, navigate to the **Administrator** group section in the left navigation menu and select **Departments**. The main central workspace provides several administrative controls:

- **Active / Inactive Status Tabs:** Toggle between *Active Departments* to manage units currently participating in live workflows, and *Inactive Departments* to review archived or reorganized units.

- **Contextual Search Bar:** Use the *"Search departments..."* filter input box to instantly locate specific divisions by typing their department names.
- **Add Department Button:** Click the blue **+ Add Department** button at the top-right corner to open a blank configuration form for a new corporate branch.
- **Inline Controls:** The main data grid lists all registered entries, displaying the *Department Name*, *Assigned Managers*, and a visual *Status* chip. You can click the inline toggle switch to instantly modify active state availability, or click the pencil icon to modify deep property settings.

## B. Setup & Edit Department Parameters

Clicking the edit pencil icon or creating a new record opens the focused configuration pane. App Administrators must populate and maintain the following structural properties:



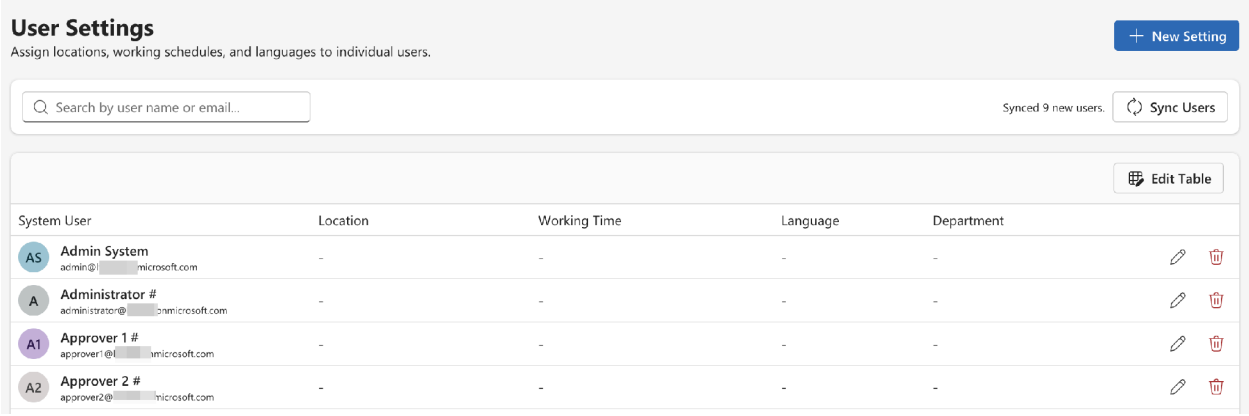

- **Department Name:** Enter the mandatory formal name of the business unit (e.g., *Cloud Infrastructure*, *Digital Transformation*, *Product Engineering*). This label represents the department across all end-user submission forms and monitoring dashboards.
- **Managers Selection:** A dynamic multi-select lookup field linked directly to your system user profiles. This field allows you to assign one or more designated individuals who are officially responsible for the department.
    - **System Integration Rule:** When a workflow step utilizes a group-based or multi-level manager routing logic, the system scans this multi-select array to distribute pending tasks to the assigned department leaders' queues.
    - **Configuration Note:** You can easily add multiple managers to a single department (e.g., mapping both *Admin System* and *Long Truong* to a single unit) to accommodate cross-functional structures or co-management scenarios. Existing assignments can be revoked by clicking the small "X" icon on their profile tags.
- **Active Status Toggle:** Controls the global availability of the business unit.
    - *Enabled (Yes):* The department is active and available for use on forms, workflow routing maps, and explorer dashboards.

- *Disabled (No):* Hides the department from end-users navigating submission screens, preventing new forms from being logged under this organizational node while safely preserving historical transactional logs.

💡 **Submission Rule:** Once changes or additions are finalized, click the blue **Save Changes** button at the bottom right corner of the pane to instantly update the live organizational mapping rules across the application suite.

## 3. User Settings

The **User Settings** module is a critical administration panel used to bind core operational master data—such as geographic locations, standard work schedules, localized languages, and organizational departments—directly to individual system profiles. Correctly mapping these dependencies ensures that localized validation rules, automated SLA calculations, and dynamic workflow routing chains function seamlessly for every employee.




### A. The User Settings Dashboard

To manage individual user mappings, navigate to the **Administrator** group section in the left navigation menu and select **Users**. The main console workspace offers a set of specialized data synchronization and batch editing controls:

- **Sync Users Engine:** Located at the top right of the dashboard, clicking the **Sync Users** button initiates a real-time background query to fetch and refresh active directory accounts from your organization's core system tenant. If all personnel profiles are already fully mapped and up to date, the platform will display an analytical status notification reading: *"All users already have settings. Nothing to sync."*
- **Contextual Directory Search:** Use the search text box at the top left to instantly filter the active list grid by typing an employee's formal name or explicit email address.
- **Add Individual Settings:** Click the blue **+ New Setting** button to manually hook up an unmapped user account to an environmental profile structure.

- **Data Presentation Grid:** The centralized list displays an aggregated data sheet containing key master variables for each user, including their *System User (Name/Email)*, *Location*, *Working Time*, *Language*, and active *Department*.

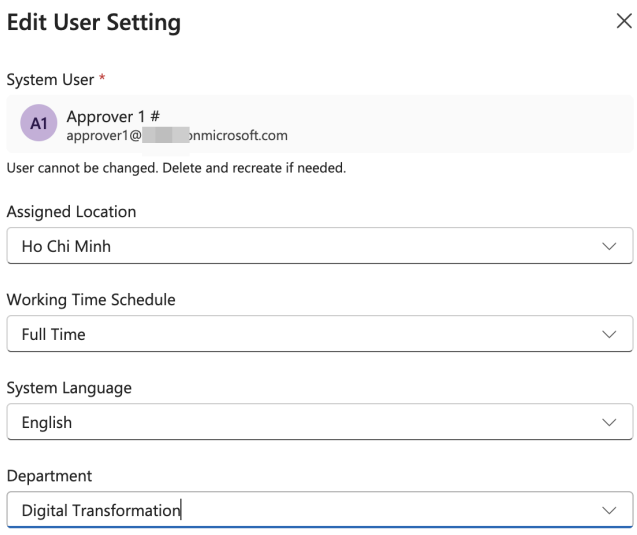
## B. Batch Management: Edit Table Mode

For fast, large-scale administrative maintenance (e.g., during mass corporate onboarding or annual restructuring shifts), the platform includes an efficient grid editing utility:

1. Click the **Edit Table** button on the right bank of the data data grid to shift the platform into **Edit Table Mode**.
2. Once activated, the static rows instantly transform into inline interactive dropdown selection menus across all mapping variables (*Location*, *Working Time*, *Language*, *Department*).
3. Administrators can quickly scroll through the employee directory and make direct inline selections without opening individual user records one by one.
4. Click the blue **Save Changes** button to commit all inline row modifications simultaneously, or click **Cancel** to roll back changes.

## C. Granular Profile Mapping: Edit User Setting Form

For deep adjustment of a specific profile, clicking the pencil icon at the far right of any user row opens a focused, dedicated properties panel. App Administrators must evaluate and manage the following structural parameters:




- **System User Identity:** Displays the employee's verified display name and underlying corporate identity email string (e.g., admin@italabs.onmicrosoft.com).
    - **System Integration Rule:** To preserve data consistency and tracking integrity across audit trails, the assigned System User identity string is **read-only and cannot be changed**

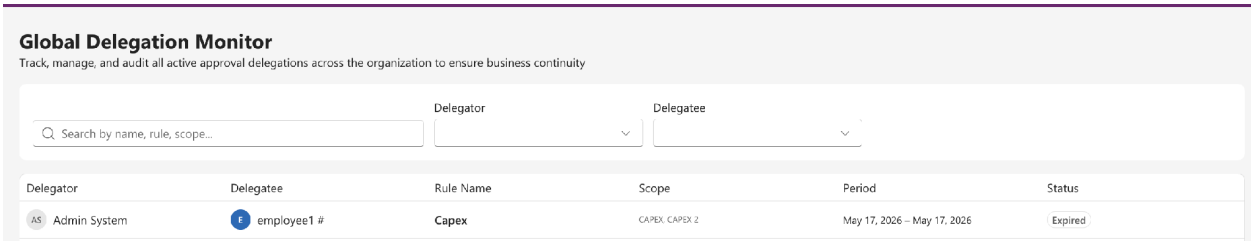
within an active profile. If a mistake was made during initial routing, the entire line configuration must be purged using the red trash icon and recreated from scratch.

- **Assigned Location:** A lookup dropdown used to anchor the employee to a specific physical corporate facility or geographic site profile (e.g., *VietNam*). This value drives localized conditional routing and filtering properties across submission grids.
- **Working Time Schedule:** Ties the employee to a pre-defined shift pattern or core attendance timeline (e.g., *Vietnam WT*). The *Business Time* SLA countdown engine reads this specific variable to calculate processing delays, automatically pausing target timers when tasks land outside the user's standard working hours.
- **System Language:** Sets the baseline localized language preference for the user's interface layout (e.g., *English*).
- **Department Assignment:** Maps the employee directly to their designated structural division (e.g., *Digital Transformation*). This field serves as a foundational data hook for the workflow engine when requests are directed to go through specific department-head approval tiers.

💡 **Submission Rule:** Once individual modifications are finalized, click the blue **Save Settings** button at the bottom right corner of the focused pane to permanently bind the operational rules to the user account.

## 4. Global Delegations

The **Global Delegation Monitor** is a centralized compliance and auditing dashboard engineered to manage, track, and audit all active and historical approval delegation mappings across the entire organization. This module ensures complete business continuity, preventing critical workflow bottlenecks when primary approvers are out of the office, while maintaining a strict, transparent audit trail for security and regulatory compliance.




### A. The Global Delegation Dashboard Controls

To monitor and configure platform-wide proxies, navigate to the **Administrator** group section in the left navigation menu and select **Global Delegations**. The upper workspace provides high-level filtering matrices to audit historical routing rules efficiently:

- **Global Text Filter:** Use the free-text search field at the left to instantly narrow down data entries by typing a specific name, rule name, or scope parameter.
- **Delegator Lookup Array:** A dedicated dropdown menu to isolate rows belonging to a specific primary task owner who has reassigned their signing authority.

- **Delegatee Lookup Array:** A dropdown menu to filter records based on the proxy user who was granted acting authority.

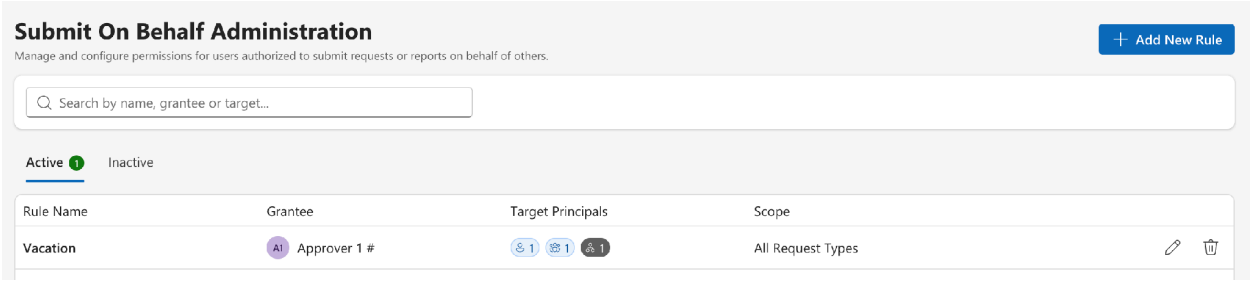
### B. Audit Grid Schema and Data Properties

The primary monitoring table aggregates every delegation instruction processed by the automation engine. App Administrators can track six critical compliance metrics across the ledger:

- **Delegator:** Displays the identity profile of the standard or executive manager who is offloading their approval queue (e.g., *Admin System*).
- **Delegatee:** Specifies the precise employee proxy profile authorized to act on behalf of the primary owner (e.g., *employee1 #*, *Long Truong #*).
- **Rule Name:** The administrative or user-defined title assigned to the delegation command to specify its operational context (e.g., *Capex*, *Test 1*, *test 3*).
- **Scope:** Dictates the exact boundary of functional authority conceded to the proxy.
    - *All Requests:* The proxy is authorized to approve any incoming process redirected to the delegator across all active form categories.
    - *Targeted Scope:* Limits the proxy's acting authority strictly to the designated Request Types (e.g., *CAPEX*, *CAPEX 2*), ensuring sensitive or high-value decisions do not route to unauthorized personnel.
- **Period:** The explicit date boundaries defining when the delegation protocol is programmatically active (e.g., *May 9, 2026 – May 11, 2026*).
    - **System Execution Logic:** The workflow engine automatically redirects pending approval tasks to the delegatee's queue at 12:00 AM on the start date and completely revokes the proxy's acting access at 11:59 PM on the end date.
- **Status:** A color-coded analytical chip indicating the active phase of the rule.
    - *Expired Status:* Indicates that the designated period has lapsed. The system securely locks the assignment profile, retaining the row permanently for archival purposes while returning all routing workflows exclusively to the original owner.

## 5. Submit on Behalf Management

The **Submit On Behalf Administration** module is a specialized governance panel designed to manage and configure advanced proxy submission privileges. This feature enables authorized coordinators, administrative assistants, or department delegates to initiate, populate, and dispatch operational requests on behalf of other employees or organizational units. It ensures transactional continuity across field teams or executive structures, while strictly logging security contexts to preserve transparent audit trails.



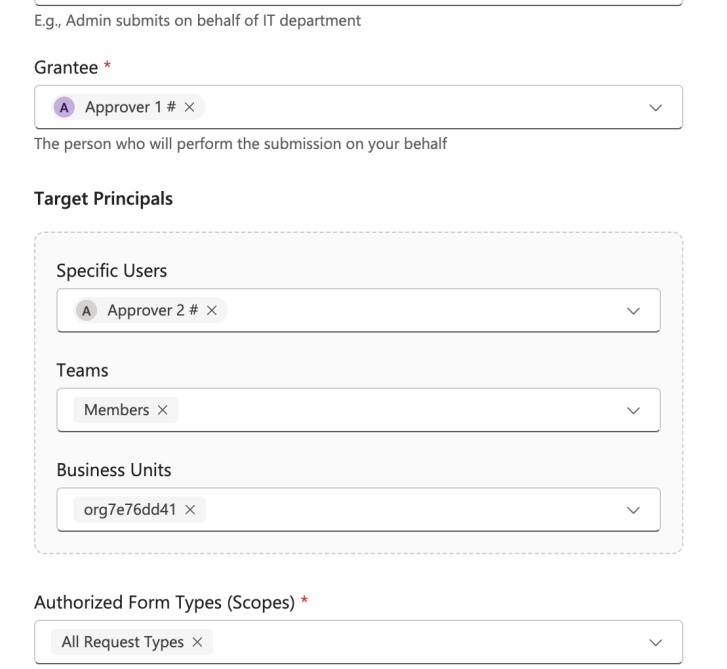

## A. The Submit On Behalf Dashboard Control Base

To oversee or grant proxy delegation authorities across your enterprise tenant, navigate to the **Administrator** group section in the left navigation menu and select **Submit on Behalf**. The core workspace interface provides several grid and query management options:

- **Contextual Query Filtering:** Use the central search bar at the top left (*"Search by name, grantee or target..."*) to immediately isolate specific routing records by inputting the rule name, the authorized submitter, or target employee indicators.
- **Active / Inactive Segment Tabs:** Allows administrators to filter the workspace between active delegation rules currently handling live data entries and inactive rules that have been archived.
- **Add New Rule Tool:** Click the blue **+ Add New Rule** button at the top right to open a blank configuration layout panel and construct a new proxy assignment map.
- **Grid Action Controls:** The tracking matrix lists all registered proxies, displaying the *Rule Name*, the *Grantee* (Authorized Submitter), the *Target Principals* (Count/Scope of represented users), and the active *Scope* of forms allowed. Administrators can use the pencil icon to modify properties or click the trash icon to instantly revoke proxy rights.

## B. Mapping Proxy Properties: Setup Submit On Behalf Panel

When clicking to edit an existing profile or creating a new rule, the focused configuration pane guides administrators through mapping out precise behavioral and authorization boundaries:



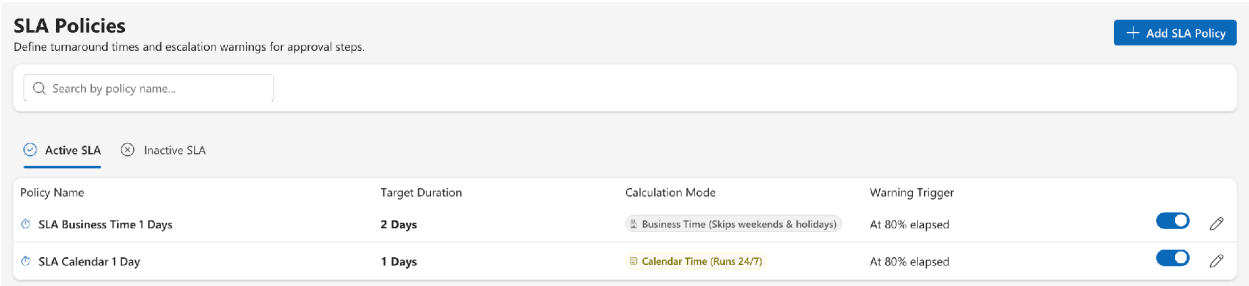

- **Active Status Toggle:** Controls the functional availability of the proxy mapping in real-time.
    - *Enabled:* The rule is active; the grantee can immediately select target principals on form generation screens.
    - *Disabled:* Temporarily freezes the proxy rule without purging its historical metadata or layout properties.
- **Rule Name:** Enter a unique, mandatory descriptor for the policy mapping to clearly outline its business context (e.g., *All Request*, or a custom label like *"Admin submits on behalf of IT department"*).
- **Grantee:** Map the specific individual user profile who is being officially authorized to perform the submissions.
    - **System UI Context:** The designated grantee (e.g., *Admin System*) will see a dynamic employee selection field inside their entry portal, allowing them to choose who they are representing when initiating a new workflow.

- **Target Principals Matrix:** This critical boundary block defines the exact security blast radius of the proxy rule. App Administrators can target and restrict the represented scope across three distinct identity vectors:
    - *Specific Users:* Select explicit individual accounts from the corporate directory (e.g., hardcoding employee1 # so the grantee can only represent that specific person).
    - *Teams:* Select entire Dataverse or Entra ID security groups, authorizing the grantee to act on behalf of any active member within that collective unit.
    - *Business Units:* Restrict or extend the proxy authority across entire structural corporate divisions or operational node hierarchies.
- **Authorized Form Types (Scopes):** Dictates exactly which workflow categories the grantee is permitted to execute for their target principals, avoiding cross-departmental policy violations.
    - *All Request Types Selection:* Grants blanket authority to log any form type configured within the system environment on behalf of the targets.
    - *Targeted Scope Selection:* Administrators can use the multi-select dropdown menu to explicitly check or uncheck individual forms (e.g., restricting the rule so the proxy can only submit *CAPEX* or *CAPEX 2* forms, while hiding sensitive HR templates like *Leave Requests* or *Performance Evaluations*).

💡 **Submission Rule:** Once settings are completed, click the blue **Save Rule** button at the bottom right corner of the panel to permanently commit the authorization properties to the live platform routing engine.

## 6. SLA Management

The **SLA Policies** module is the core configuration engine used to establish organization-wide turnaround time baselines, processing deadlines, and proactive escalation rules for operational approval steps. Maintaining clear SLA frameworks helps optimize business velocity, prevent process stagnancy, and automatically identify processing bottlenecks before they impact corporate timeline commitments.



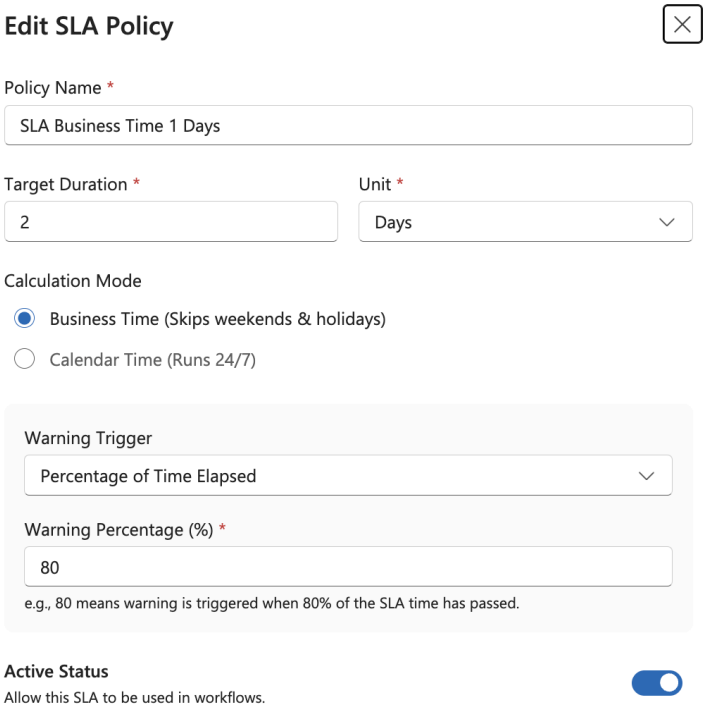

### A. The SLA Policies Dashboard Control Base

To access and manage your system-wide performance policies, navigate to the **Administrator** group section in the left-hand navigation pane and select **SLAs**. The central grid dashboard provides comprehensive administrative controls:

- **Contextual Policy Filter:** Use the upper search text input field (*"Search by policy name..."*) to instantly query and isolate specific rule frameworks by typing their assigned policy titles.
- **Active / Inactive State Segments:** Toggle between *Active SLA* tabs to oversee rules currently driving live workflow engines, and *Inactive SLA* tabs to review deprecated or paused operational benchmarks.
- **Add SLA Policy Instrument:** Click the blue **+ Add SLA Policy** button at the top right corner to initialize a blank configuration pane and construct a new turn-around protocol.
- **Dashboard Summary Matrix:** The live summary table renders key metric columns at a glance, detailing the *Policy Name*, *Target Duration*, the underlying *Calculation Mode*, active *Warning Triggers*, and an instant inline toggle switch to enable or disable the policy rule profile.

## B. Setup & Edit SLA Policy Parameters

Clicking the inline pencil icon or launching a new policy record opens the detailed **Edit SLA Policy** configuration sheet. App Administrators must configure and maintain the following operational metrics:




- **Policy Name:** Enter a mandatory, descriptive formal title for the rule mapping to ensure clear administrative visibility across workflow configuration screens (e.g., *SLA Business Time 1h*, *SLA Calendar 1 h*).
- **Target Duration & Unit:** Establishes the exact maximum lifespan allowed for a task block before it is systematically flagged as late.

- *Target Duration Input:* A mandatory numeric field defining the threshold value (e.g., 1 or 2).
- *Unit Selection Dropdown:* Dictates the temporal increment applied to the numeric input. Administrators can choose between **Hours** for fast-turnaround requests or **Days** for long-cycle operational processes.

- **Calculation Mode Selection:** Dictates how the automation engine counts time and handles calendar boundaries, weekends, and organizational closures:

| SLA Calculation Mode | Core Logic & Execution Boundaries | Best Used For |
|---|---|---|
| Business Time | The countdown timer **automatically pauses** over standard non-working weekend days and cross-references the centralized *Public Holidays* registry. If an item lands in a queue during a closure, the clock freezes to ensure operational fairness. | Standard corporate desk routines (e.g., *Leave Approvals, Procurement Requests, Expense Claims*). |
| Calendar Time (24/7) | The system operates an absolute, continuous countdown tracking engine **24 hours a day, 7 days a week**. It completely ignores weekends, regional holidays, or corporate calendar closures. | High-priority infrastructure or emergency reporting (e.g., *IT Critical Incident Reports, Security Breach Protocols*). |

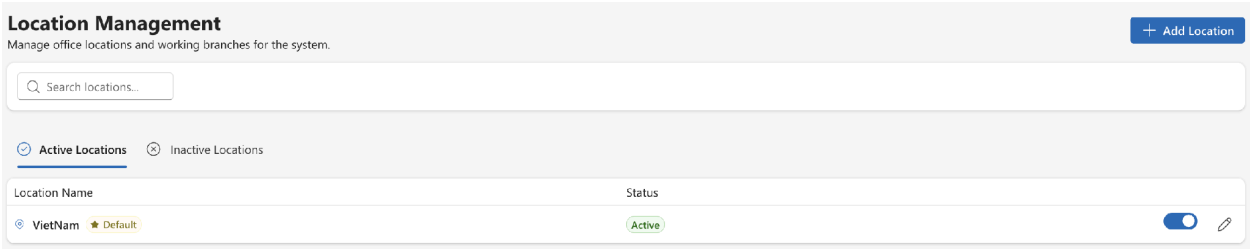
- **Warning Trigger Configuration:** Implements proactive alert boundaries, allowing the system to flag a near-breach task and notify stakeholders before the countdown lapses.
  - *Warning Trigger Definition:* Set to analyze performance based on the *Percentage of Time Elapsed*.
  - *Warning Percentage (%):* A mandatory numerical parameter defining the precise warning milestone (e.g., entering 80 means an escalation warning alert fires automatically the moment 80% of the allocated SLA duration has passed without user resolution).
- **Active Status Toggle:** Controls whether the specific SLA framework is available for assignment inside deployment architectures.
  - *Enabled (Yes):* Makes the policy active and immediately selectable as an SLA timer anchor within specific Request Types or independent workflow steps.

💡 **Submission Rule:** Once all variables are verified, click the blue **Save SLA** button at the bottom right corner of the panel to commit the configuration permanently to the live system environment.

## 7. Location Management

The **Location Management** module provides a centralized directory to map and govern your enterprise's physical footprint, including corporate headquarters, regional branch offices, logistics warehouses, or international production sites. Registering structured location assets allows the platform to automatically

pre-populate user profile boundaries, drive localized validation rules, and establish geographic condition routing paths across active workflow forms.



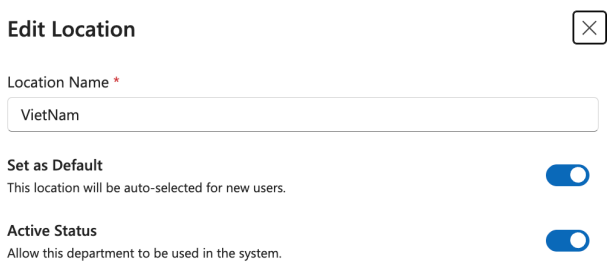

## A. The Location Management Dashboard

To oversee and maintain your organization's physical sites, navigate to the **Administrator** group section in the left navigation menu and select **Locations**. The main central hub offers several core administrative options:

- **Active / Inactive Location Tabs:** Toggle between *Active Locations* to manage properties currently available across user profiles and live forms, and *Inactive Locations* to review decommissioned, moved, or archived facility structures.
- **Search Box Filter:** Use the upper textual input interface (*"Search locations..."*) to immediately query and isolate specific site profiles by typing their designated location names.
- **Add Location Action:** Click the blue **+ Add Location** button at the top-right corner to launch a blank property sheet and register a new operational facility.
- **Main Summary Grid:** The data table provides a high-level view of registered sites, rendering the *Location Name* alongside a color-coded *Status* badge. A dedicated inline toggle switch allows quick activation or pausing of a profile, while the pencil icon opens the full configuration panel.
- **Default Tag:** Individual rows can display a golden **Default** star badge (e.g., next to *VietNam*). This indicates which site functions as the fallback baseline location during automated user directory synchronizations.

## B. Setup & Edit Location Parameters

Clicking the inline edit pencil icon or initiating a new record opens the focused **Edit Location** properties pane. App Administrators must configure and maintain the following operational parameters:



- **Location Name:** Enter the mandatory, descriptive formal name of the corporate facility or country site (e.g., *VietNam*). This label represents the location drop-down variable on all active end-user submission forms and monitoring layouts.
- **Set as Default Toggle:** Dictates the profile baseline behavioral policy when the automation engine initializes unmapped accounts.
    - *Enabled (Yes):* Marks this specific entry as the organization-wide baseline fallback. This location will be automatically selected and assigned to any new user profiles brought in during background synchronization loops if their regional location metadata is left undefined in the core directory.
    - *Disabled (No):* Keeps the entry as a standard selectable location asset without fallback automated assignment privileges.
- **Active Status Toggle:** Regulates whether the site is functionally deployed across the environmental ecosystem.
    - *Enabled (Yes):* The location profile is fully active, allowing administrators to map it inside user settings and exposing it as a valid parameter inside reporting grids.
    - *Disabled (No):* Freezes the entry and blocks it from being selected inside the active user forms setup, preventing errors while safely retaining old data properties for historical auditing.

💡 **Submission Rule:** Once verified, click the blue **Save Location** button at the bottom right corner of the focused pane to permanently apply the updated location properties across the application suite.

## 8. Working Time Management

The **Working Time Schedules** module serves as the core calculation base for the platform's time-sensitive operational features. By structuring precise daily working hours, operational days, and mandatory break windows for different employee groups, this module directly drives the *Business Time* SLA tracking engine. Accurate calendar mapping ensures that processing deadlines and overdue countdown timers automatically pause outside of official corporate working hours, shifts, or non-operational windows.



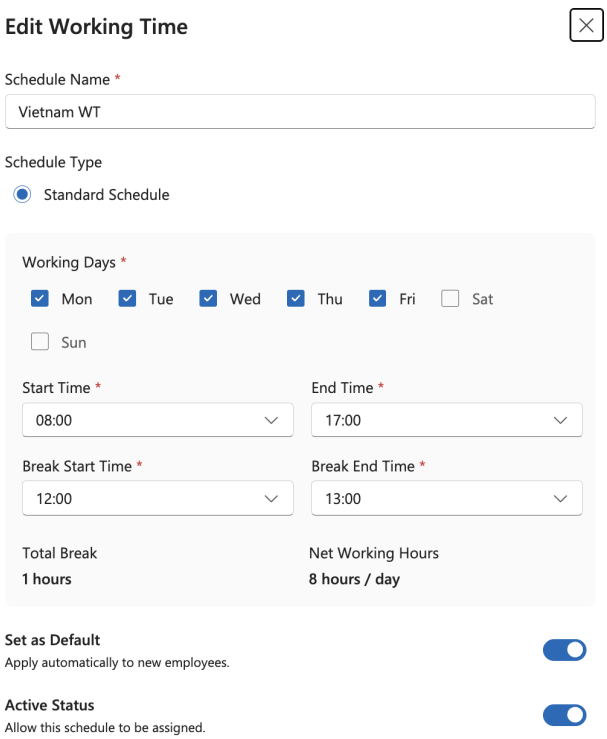
## A. The Working Time Schedules Dashboard

To manage and audit organization-wide shift baselines, navigate to the **Administrator** group section in the left navigation menu and select **Working Time**. The primary configuration hub provides several core interface options:

- **Active / Inactive Status Segments:** Toggle between *Active Working Times* to maintain profiles currently driving active workflow operations, and *Inactive Working Times* to review deprecated, historical, or seasonal shift models.
- **Search Bar Filter:** Use the upper textual search input box (*"Search by schedule name..."*) to quickly query and isolate specific schedule definitions.
- **Add Schedule Instrument:** Click the blue **+ Add Schedule** button at the top right corner to open a blank calendar workspace and define a new time shift model.
- **Main Summary Data Grid:** The table displays an aggregated layout of registered profiles. Each row renders the *Schedule Name*, a summary text block detailing the *Daily Configuration* (including core shifts and break hours), the schedule *Type* (e.g., *Standard*), a color-coded *Status* badge (*Active*), and an inline toggle switch for fast status adjustments.
- **Default Baseline Indicator:** A golden **Default** star badge (e.g., next to *Vietnam WT*) highlights the organization-wide baseline fallback schedule automatically assigned to new users.

## B. Setup & Edit Working Time Parameters

Clicking the inline edit pencil icon or creating a new timeline record launches the detailed **Edit Working Time** configuration panel. App Administrators must evaluate and manage the following operational metrics:




- **Schedule Name:** Enter a mandatory, descriptive formal name for the time model profile (e.g., *Vietnam WT*). This label serves as the selection variable inside user mapping grids.
- **Schedule Type Selection:** Establishes the structural nature of the shift pattern (e.g., set to *Standard Schedule*).
- **Working Days:** A mandatory checkbox matrix representing the official operational business week. Administrators must check or uncheck individual days (e.g., selecting *Mon, Tue, Wed, Thu, Fri* while leaving *Sat* and *Sun* unchecked) to dictate which calendar dates actively count toward SLA countdown loops.
- **Start Time & End Time:** Mandatory dropdown selection pickers defining the hard temporal boundaries of the corporate work shift (e.g., opening at *08:00* and closing at *17:00*).
- **Break Start Time & Break End Time:** Mandatory dropdown selection pickers establishing the official resting window (e.g., starting at *12:00* and ending at *13:00*).
- **Automated Operational Metrics:** The engine runs real-time mathematical validation tracks based on the hour selections and displays summary indicators:
    - *Total Break:* Displays the calculated non-working resting duration (e.g., *1 hours*).
    - *Net Working Hours:* Displays the actual active operational duration applied to the SLA metrics (e.g., *8 hours / day*).
- **Set as Default Toggle:** Controls the programmatic profile onboarding logic.

    - *Enabled (Yes):* Marks this specific time schedule as the organization-wide fallback baseline. The platform will automatically apply and bind this schedule to any new employee profiles synchronized from the tenant directory if their individual working schedules remain undefined.

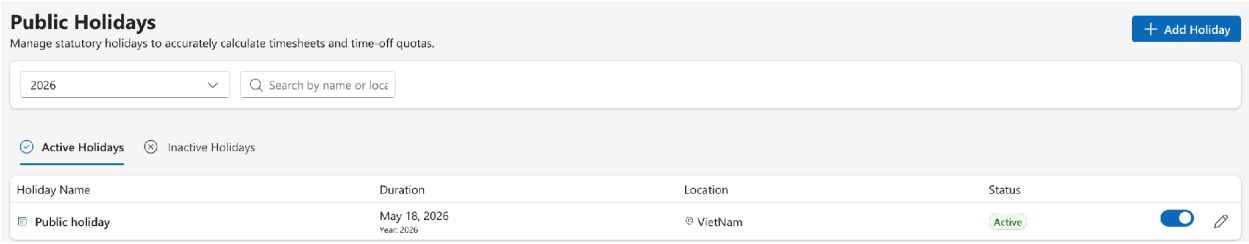
- **Active Status Toggle:** Regulates whether the specific working schedule is open for environmental assignment.
    - *Enabled (Yes):* Makes the schedule active, allowing administrators to map it directly inside active *User Settings*.

💡 **Submission Rule:** Once verified, click the blue **Save Schedule** button at the bottom right corner to permanently commit the structural calendar properties to the live platform routing engine.

## 9. Public Holiday Management

The **Public Holidays** management module is an essential administrative utility used to maintain the centralized calendar registry of statutory holidays, regional non-working days, and official corporate closures. This module directly feeds environmental calculation engines across the application suite.

Maintaining an accurate holiday repository is critical for the platform to correctly calculate timesheets, manage time-off quotas, and run the *Business Time* SLA tracking engine—which automatically pauses overdue countdown timers when tasks sit in an approver's queue during a registered holiday.




### A. The Public Holidays Dashboard

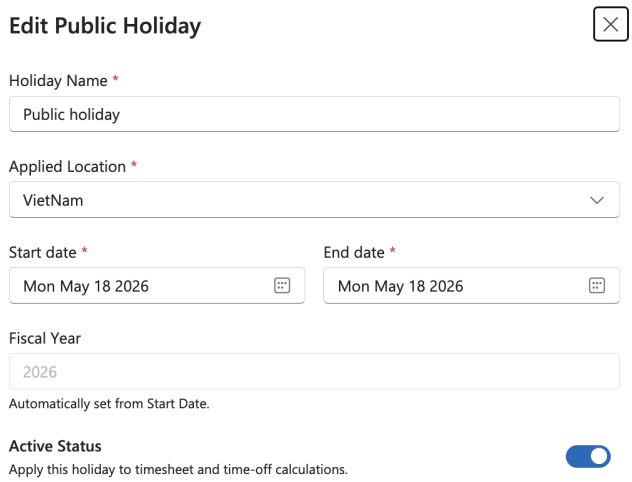
To oversee and structure your organization's non-working calendar milestones, navigate to the **Administrator** group section in the left navigation menu and select **Public Holidays**. The central administration panel provides the following control assets:

- **Fiscal Year Dropdown Filter:** Located at the top left of the workspace, this selection menu allows administrators to filter the active grid view by specific calendar years (e.g., *2026*), isolating yearly holiday schedules for clean data mapping.
- **Search Box Filter:** Use the textual input field (*"Search by name or loca..."*) to quickly query and find registered holiday events by typing key terms or specific regional names.
- **Active / Inactive Status Segment Tabs:** Easily separate current operational calendar milestones (*Active Holidays*) from old, deprecated, or historical closures (*Inactive Holidays*).
- **Add Holiday Button:** Click the blue **+ Add Holiday** button at the top right corner to open a blank registration sheet and map out an upcoming non-working day.

- **Ledger Data Columns:** The central management table organizes registered events across four distinct tracking metrics:
    - *Holiday Name:* The official descriptive title of the event (e.g., *Public holiday*).
    - *Duration:* Displays the explicit dates of the closure (e.g., *May 18, 2026*) along with its associated *Fiscal Year* marker.
    - *Location:* Indicates the targeted geographic boundary where the non-working day applies (e.g., *VietNam*).
    - *Status:* Renders a green *Active* badge alongside an inline master toggle switch for quick profile activation adjustments and a pencil icon for deeper edits.

## B. Setup & Edit Public Holiday Parameters

Clicking the inline edit pencil icon or launching a new record opens the focused **Edit Public Holiday** configuration panel. App Administrators must populate and maintain the following core parameters:




- **Holiday Name:** Enter a mandatory, formal title for the non-working day (e.g., *Public holiday*). This label represents the calendar asset across system audit trails and time-off tracking modules.
- **Applied Location:** A mandatory dropdown selector used to bind the statutory closure to a specific geographic operational branch or country profile (e.g., *VietNam*).
    - **System Automation Rule:** Tying holidays to specific locations ensures regional compliance. For example, a public holiday registered exclusively for *VietNam* will only affect the SLA timers and timesheet models of employees anchored to that specific geographic site profile in *User Settings*, leaving other global branch timelines unhindered.
- **Start Date & End Date:** Mandatory date pickers that establish the exact time boundaries of the corporate closure. For single-day events, the start and end dates will match (e.g., *Mon May 18 2026*). For extended structural closures (such as multi-day national festivals or corporate winter

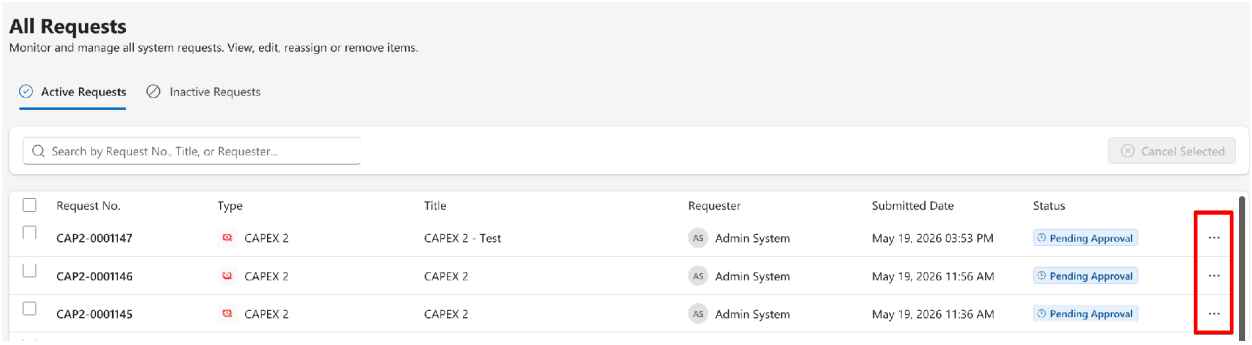
shutdowns), map the full date range from the initial opening closure to the final non-working day.

- **Fiscal Year Display:** A read-only field that is automatically calculated and hardcoded by the system based on the designated *Start Date* entry (e.g., *2026*). This preserves structural integrity during multi-year dashboard auditing.
- **Active Status Toggle:** Regulates the programmatic deployment of the holiday asset.
    - *Enabled (Yes):* The holiday is live. The platform instantly links this date boundary to timesheet validation modules, quota calculations, and workflow SLA tracking engines.

💡 **Submission Rule:** Once all holiday properties are verified, click the blue **Save Holiday** button at the bottom right corner of the focused pane to permanently apply the updated calendar metrics to the platform ecosystem.

## 10. Request Management

The **All Requests** module is the central administrative data ledger and audit vault of the platform. This control panel grants App Administrators and System Administrators global oversight over every single transaction, form submission, and approval lifecycle executed across the environmental ecosystem. It serves as the primary tool for compliance auditing, operational bottleneck analysis, structural troubleshooting, and force-reassignment actions.




### A. Central Workspace Management Controls

To oversee the master request registry, navigate to the **Administrator** group section in the left navigation menu and select **All Requests**. The upper control layer provides comprehensive filtering, segment switching, and batch processing mechanics:

- **Global Structural Query Bar:** Use the search text box (*"Search by Request No., Title, or Requester..."*) to instantly isolate specific transaction files. The engine processes inputs in real-time, matching queries against distinct data parameters such as request sequence numbers, dynamic titles, or employee names.
- **Segmented Execution Tabs:**
    - *Active Requests:* Used to monitor workflows currently processing through live validation steps and active line manager or department reviews.

  - *Inactive Requests:* Used to audit historically finalized, rejected, or canceled items that have exited the active automated workflow cycle.

- **Batch Action Console (Bulk Cancel):** Inside the *Active Requests* tab, administrators can check the bounding boxes on the left side of multiple records simultaneously. Once rows are staged, a red **Cancel Selected (X)** button appears at the top right, allowing the immediate cancellation of multiple pending items with a single command to clean up system noise or mass erroneous entries.

### B. High-Privilege Data Purging (System Admin Exclusive)

To maintain strict data integrity, database compliance, and storage optimization, the platform allows for the permanent deletion of historical or archived records under rigid security constraints:

- **Inactive Tab Purging Boundary:** Permanent deletion of data is strictly confined to the *Inactive Requests* tab. Active workflows cannot be deleted under any circumstances until they have been formally rejected, completed, or explicitly canceled to prevent accidental live-process destruction.
- **Role-Based Security Enforcement: Only accounts assigned the full System Administrator security role possess the authority to purge records from the system.** Standard users, managers, and even *App Administrators* do not have access to this destruction command. For App Administrators, the delete instrument remains completely hidden or cryptographically locked to ensure proper segregation of duties.
- **Executing Deletion:** When a *System Administrator* navigates to the *Inactive Requests* tab, they can select one or more archival records and click the high-privilege delete action tool. This execution completely purges the target item containers, attached line items from sub-grids, and linked metadata assets from the underlying Dataverse database layer permanently.

### C. Ledger Data Schema

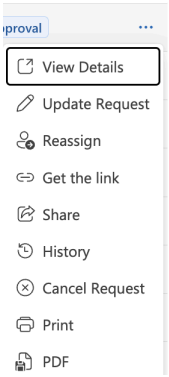
The primary master table organizes registered entries across six foundational metadata columns:

- **Request No.:** The unique, system-generated alphanumeric operational sequence ID driven by the Request Type's predefined prefix configuration (e.g., CAP2-0001147, SUB3001143, BOF001141).
- **Type:** Displays the core workflow category form layout coupled with its distinct Fluent UI icon (e.g., *CAPEX 2, Sub Form 3, Sub Form 2, The Form*).
- **Title:** The dynamic formatted string resulting from user inputs or automatic generation expressions (e.g., *CAPEX 2 - Test, Sub Form 3 - 12*).
- **Requester:** Tracks the original submitter's system identity profile, showing their account profile chip and display name (e.g., *Admin System, employee1 #*).
- **Submitted Date:** A permanent, unalterable system timestamp log marking the exact moment the record was committed to the database (e.g., *May 19, 2026 03:53 PM*).

- **Status:** A color-coded, live tracking badge indicating the exact processing step of the request. Statuses range from *Pending Approval* and *Approver 1 - Pending* to green *Hoàn Thành* (Completed) chips, offering immediate visual tracking.

### D. Administrative Context Action Menu

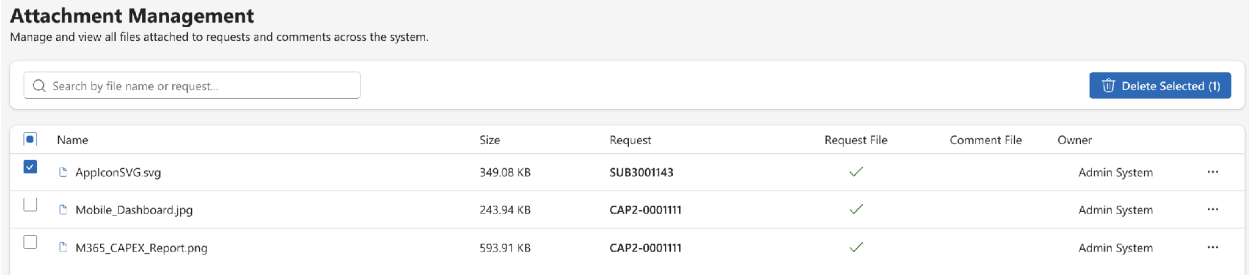
Clicking the ellipsis button (...) at the far right of any specific row launches a comprehensive, high-privilege action dropdown panel. These tools allow authorized administrators to bypass standard user restrictions and manage records directly:




- **View Details:** Opens the structural data sheet of the request in read-only mode to audit fields, tables, and nested grids.
- **Update Request:** Grants administrative write-access to correct data entry errors or adjust filed values mid-lifecycle if an unapproved record contains inaccurate operational metadata.
- **Reassign:** A high-level bypass tool allowing administrators to force-transfer a stuck task from the current non-responsive reviewer to another authorized proxy or line manager, eliminating operational bottlenecks.
- **Get the link:** Extracts the exact environmental URL pointing directly to the specific request container for easy sharing or integration into external ticketing systems.
- **Share:** Configures ad-hoc collaboration rights, extending temporary visibility access to auxiliary stakeholders who are not part of the standard routing matrix.
- **History:** Launches the full, immutable background audit log, detailing every step, modification timestamp, approver comment, and state change from initial creation to the current phase.
- **Cancel Request:** Instantly terminates the active workflow routing line, moving the target record status to *Canceled* and releasing any locked SLA timers.
- **Print / PDF:** Compiles the live record details and generates localized hardcopies or digital document snapshots based on the pre-configured *Print/PDF Template* layout assets.

# 11. Attachment Management

The **Attachment Management** module serves as the centralized digital asset ledger and storage governance workspace for the platform. This specialized console logs, aggregates, and monitors every file, receipt, corporate quote, or media object uploaded across standard workflow requests and internal timeline discussion comments. It functions as a critical compliance utility to audit uploaded data assets, track file ownership, and ensure enterprise storage optimization.




## A. Central Workspace & Search Controls

To oversee the platform-wide attachment repository, navigate to the **Administrator** group section in the left navigation menu and select **Attachments**. The upper dashboard region provides essential auditing tools:

- **Contextual File Query Filter:** Use the free-text search bar (*"Search by file name or request..."*) to instantly isolate specific assets. The search engine processes queries in real-time, matching terms against full file strings or unique target request sequence IDs.
- **Central Asset Ledger Grid:** The master data table indexes every attached file across six descriptive compliance properties:
    - *Name:* The official filename alongside its standard format icon indicator (e.g., AppIconSVG.svg, Mobile_Dashboard.jpg, M365_CAPEX_Report.png).
    - *Size:* Tracks the exact storage footprint occupied by the file asset (e.g., *349.08 KB*, *593.91 KB*).
    - *Request:* The unique system-generated alphanumeric sequence code of the workflow form where the asset is embedded (e.g., SUB3001143, CAP2-0001111).
    - *Request File:* Displays a green checkmark if the asset was explicitly attached to the core data entry form during initial submission or manager updates.
    - *Comment File:* Displays a status indicator if the asset was dynamically uploaded as a supporting document inside the timeline *Discussion Feature* block.
    - *Owner:* Identifies the profile identity of the employee who committed the file upload to the environment (e.g., *Admin System*).

## B. High-Privilege Purging Logic & Role Segregation

To ensure maximum protection against accidental information loss, maintain strict corporate data lifecycle policies, and enforce information security standards, the platform operates a strict, role-based boundary on data destruction:

- **System Administrator Purge Privileges: Only users assigned the full, overarching System Administrator security role possess the authority to permanently delete files from the central repository.** When logged in as a System Admin, selecting one or more files using the bounding checkboxes on the left activates the blue **Delete Selected (X)** batch command button at the top right. Executing this command permanently drops the selected assets from the active cloud storage and unlinks them from their parent workflow containers.
- **App Administrator View-Only Constraint:** Standard *App Administrators* (those assigned the standard application manager role) have a strictly limited boundary within this console. **App Administrators are granted full view-only rights to search, track, monitor, and audit the attachment ledger, but they do not possess delete capabilities.** For App Administrators, the delete button and file selection checkboxes remain completely hidden, suppressed, or locked from the user interface. This structural rule ensures that application managers can audit compliance and file flows without risking the accidental destruction of critical historical audit documents.

## C. Row-Level Administrative Actions

Clicking the standard ellipsis context menu (...) at the far right of individual data rows allows authorized administrators to view deep metadata, examine transactional histories, or inspect the validation state of the associated request container to verify data mapping integrity.