Approval Hub (HR & Ops Suite)

Deployment & Setup Guide

Version 2.0.3

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1. System Prerequisites

Before initiating the installation of the app from Microsoft AppSource, ensure your environment meets the following requirements:

- **Environment:** A dedicated Microsoft Power Platform Environment (Production or UAT) with a Dataverse database enabled.
- **Storage Capacity:** Minimum of 1 GB available Dataverse Database storage capacity.
- **Licensing:** End-users must be assigned a Power Apps Premium license (Per User or Per App plan) to access the Model-Driven App and custom PCF controls.
- **Admin Permissions:** The account performing the installation must have the System Administrator security role within the target environment.

2. Installation via Microsoft AppSource

1. Navigate to the app listing on Microsoft AppSource.
2. Click the **"Get it now"** button.
3. You will be redirected to the Power Platform Admin Center. Select the target environment where you wish to install the solution.
4. Review and agree to the Terms of Use and Privacy Policy.
5. Click **Install**. The installation process will run in the background. Please wait until the status changes to Installed.

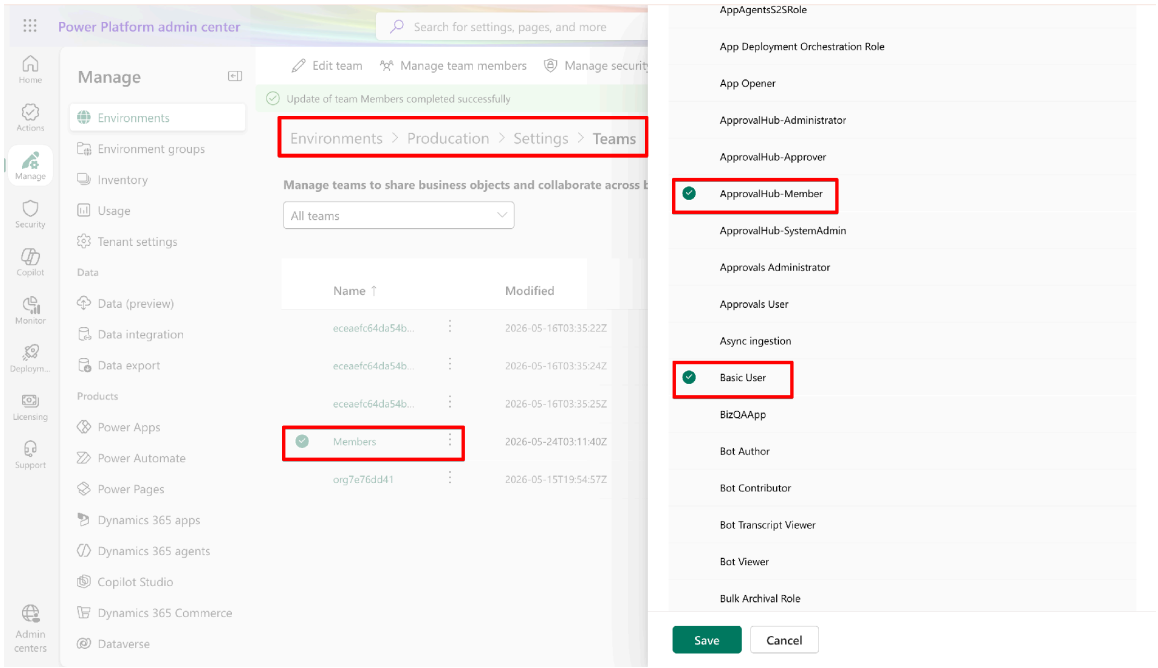
3. Security Roles Mapping (Microsoft Entra ID Integration)

To ensure secure access control, the application comes with 4 pre-defined Dataverse security roles. We highly recommend mapping these roles to your Microsoft Entra ID (formerly Azure AD) Security Groups rather than assigning them to individual users.

⚠️ **CRITICAL PREREQUISITE:** To access and use the application, every user must be assigned the standard Dataverse **Basic User** role in addition to at least one of the specific application roles listed below.

Step-by-Step Mapping:

1. Open the Power Platform Admin Center > **Environments** > [Your Target Environment] > **Settings** > **Users + permissions** > **Teams**.
2. Create a new Entra ID Group Team (e.g., *App Admins Group*).
3. Assign the corresponding Dataverse security role to this newly created team:



Target Audience	Entra ID Group Example	Assigned Dataverse Security Role	Permissions Granted
System Administrators	SG_App_SystemAdmins	`ApprovalHub-SystemAdmin`	Full system-level administration and environment control.
App Administrators	SG_App_Admins	`ApprovalHub-Administrator`	Full access to manage workflow engine configurations, SLA setups, and application parameters.
Department Managers & Approvers	SG_App_Approvers	`ApprovalHub-Approver`	Approve or reject assigned tasks. Note: If a user acts as a Department Manager, they must be assigned this Approver role to have sufficient privileges to view and manage their department's data.
Standard Employees	SG_App_Members	`ApprovalHub-Member`	Submit new requests and view personal submission history.

Alternative: Individual User Assignment (Manual Assignment)

While assigning roles via Entra ID Security Groups is recommended for easier maintenance, you can also assign security roles directly to individual users if needed.

Step-by-Step Manual Assignment:

1. Navigate to the Power Platform Admin Center > **Environments** > [Your Target Environment] > **Settings** > **Users + permissions** > **Users**.

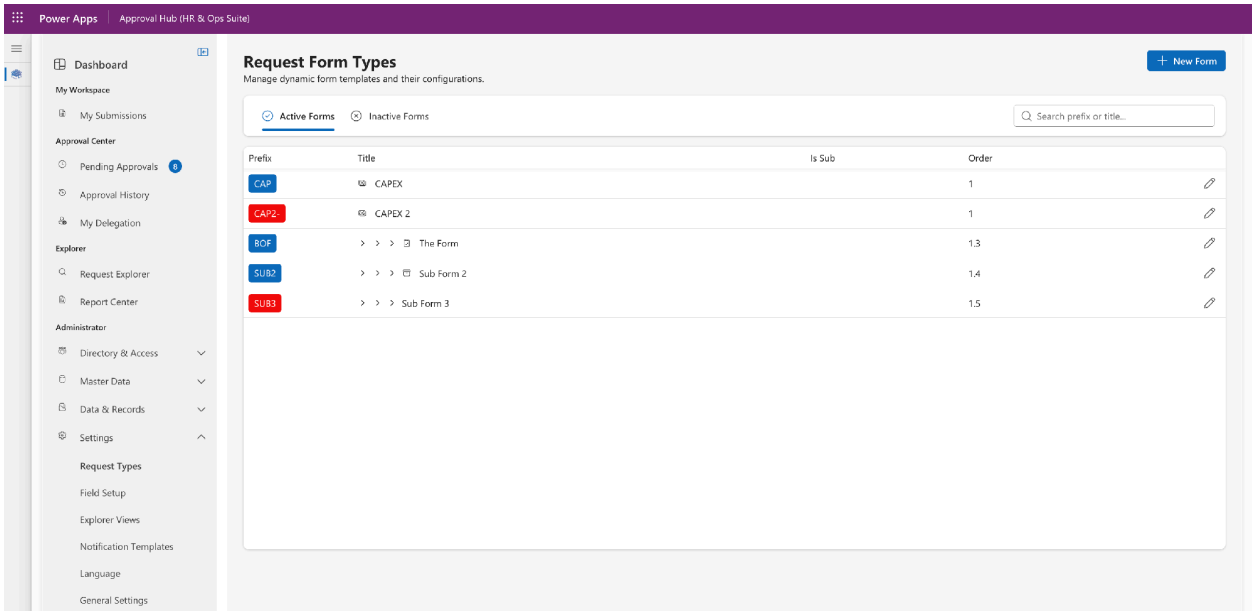
2. Select the user you want to assign a role to and click **Manage security roles** in the command bar.
3. In the right-hand pane, check the boxes for the required roles:
    - **CRITICAL:** You must first check the **Basic User** role.
    - Then, check the appropriate application role (e.g., `ApprovalHub-Member`, `ApprovalHub-Approver`, etc.) based on their responsibilities.
4. Click **Save**.

Important Note for Department Managers: If a user is designated as a manager for a specific department within the app's settings, you must ensure they are assigned the `ApprovalHub-Approver` role. Without this role, they will not have the necessary privileges to view or interact with their department's data.

4. Request Form Types

The Request Types module is the heart of the Approval Hub. Here, you define the distinct categories of requests (e.g., Expense Claim, Leave Request, IT Access) and map out their associated routing logic.

To access this, navigate to the **Request Types** link in the left navigation.



Creating a New Request Type

To initialize a new workflow, navigate to the Request Types page and click the **New Form** button. In the configuration panel that appears, you will define the foundational details of the request:

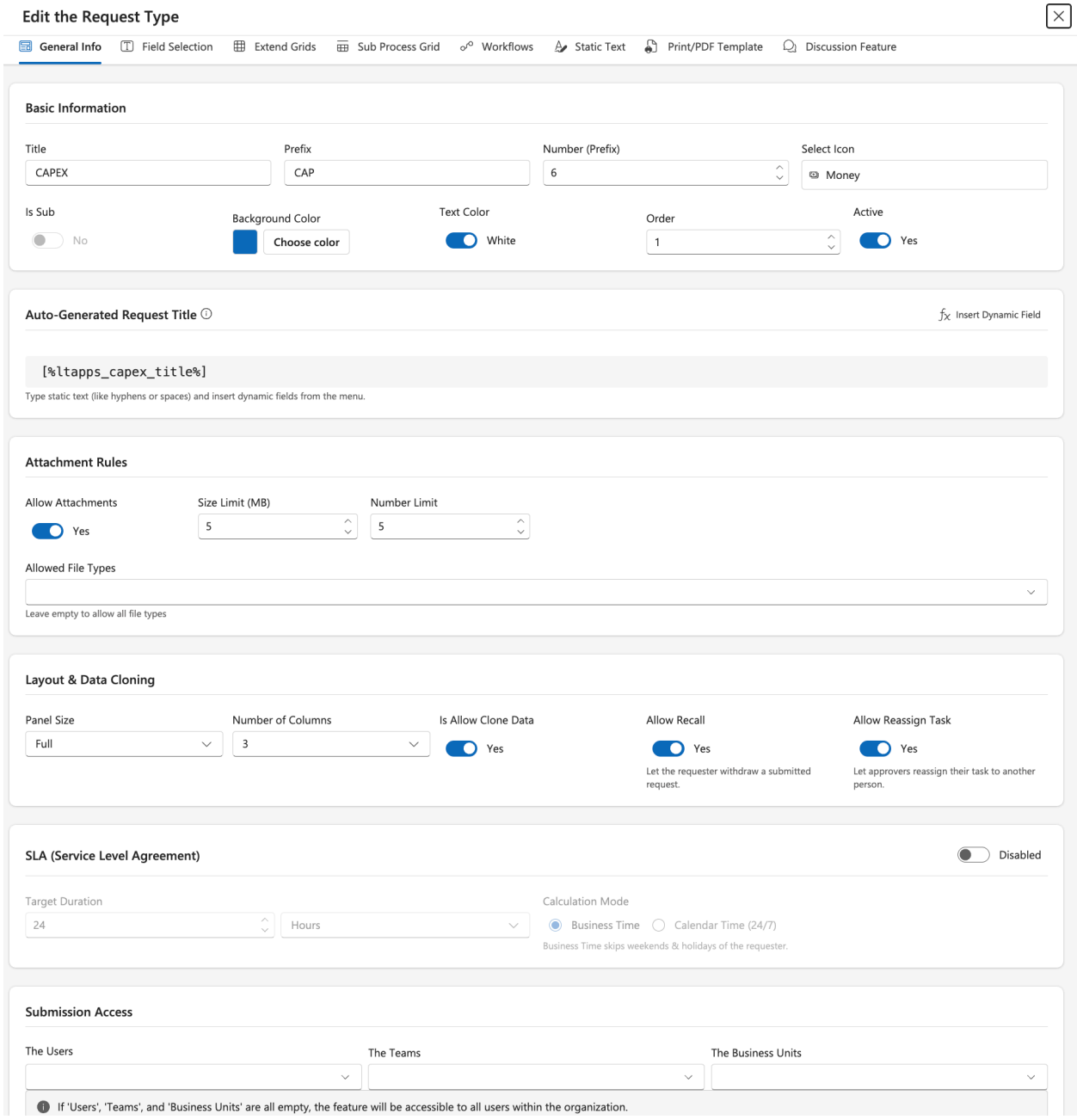
- **Title:** Enter the primary display name for this request category (e.g., Travel Expense, Hardware Request).
- **Prefix:** Define a short alphanumeric code used to auto-generate unique IDs for submitted requests (e.g., entering TRV will generate IDs like TRV-0001).
- **Icon:** Select an appropriate visual representation from the system's icon library to help users quickly identify the request type on their dashboard.
- **Is Sub (Sub-Process):** Enable this toggle if this new request is a child process of a larger workflow. Once enabled, you will be prompted to select the designated Parent Request Type.
- **Clone the Request:** To save time, enable this option to duplicate an existing request type's configuration (including its form fields and workflows) to use as a starting baseline.
- **Order:** Specify a numerical value to determine the display sequence of this request type in the End-User portal (e.g., 1 will appear first).

Edit the request Type

In the request form type page, click on the **edit icon** of the request type you want to edit.

General Info

When creating or editing a Request Type (e.g., CAPEX, Leave Request), the General Info tab is the starting point. It allows administrators to define the fundamental behavior, visual identity, form layout, and access restrictions of the request.



The configuration is divided into six critical sections:

Basic Information This section controls how the Request Type is identified and displayed to End-Users on their dashboard.

- **Title:** The display name of the request (e.g., CAPEX).

- **Prefix & Number (Prefix):** These fields define the auto-numbering format for generated requests. For example, setting the Prefix to CAP and Number to 6 will generate sequential Request IDs like CAP-000001.
- **Select Icon:** Choose an appropriate icon (e.g., Money) from the system library to visually represent the request type.
- **Is Sub:** Define if this request is a standalone process or a sub-process of another workflow.
- **Background Color & Text Color:** Customize the visual appearance of the request type's card/button on the user portal.
- **Order:** Determine the display sequence of this request type relative to others (e.g., Order 1 appears first).
- **Active:** A toggle to enable (Yes) or disable (No) the request type. Disabled types are hidden from End-Users.

Auto-Generated Request Title To maintain consistency across list views and reports, you can force the system to automatically format the title of submitted requests.

- **Dynamic Expression:** You can combine static text with dynamic variables. By clicking "Insert Dynamic Field", you can select form inputs (e.g., `[%ltapps_capex_title%]`) so the request title automatically populates based on what the user types in the form.

Attachment Rules Govern how users upload supporting documents (e.g., quotes, receipts, medical certificates) to their requests.

- **Allow Attachments:** Toggle to enable or disable file uploads for this specific request type.
- **Size Limit (MB):** Define the maximum file size allowed per attachment (e.g., 5 MB).
- **Number Limit:** Restrict the maximum number of files a user can upload per request (e.g., 5 files).
- **Allowed File Types:** Specify accepted file extensions (e.g., .pdf, .xlsx). If left empty, the system will accept all standard file types.

Layout & Data Cloning Configure the user experience and advanced interaction permissions for the data entry form.

- **Panel Size:** Determine how the form opens for the user (e.g., Full screen or sliding side panel).
- **Number of Columns:** Arrange the form's data fields into 1, 2, or 3 columns to optimize screen real estate.

- **Is Allow Clone Data:** If enabled (Yes), users can duplicate a previously submitted request to save time on repetitive data entry.
- **Allow Recall:** If enabled (Yes), the original submitter can withdraw their request after submission, provided it has not yet been processed by the approver.
- **Allow Reassign Task:** If enabled (Yes), Approvers are permitted to delegate or forward their pending approval task to another authorized user.

SLA (Service Level Agreement) Configure the expected processing times and deadlines for this specific request type to ensure operational efficiency.

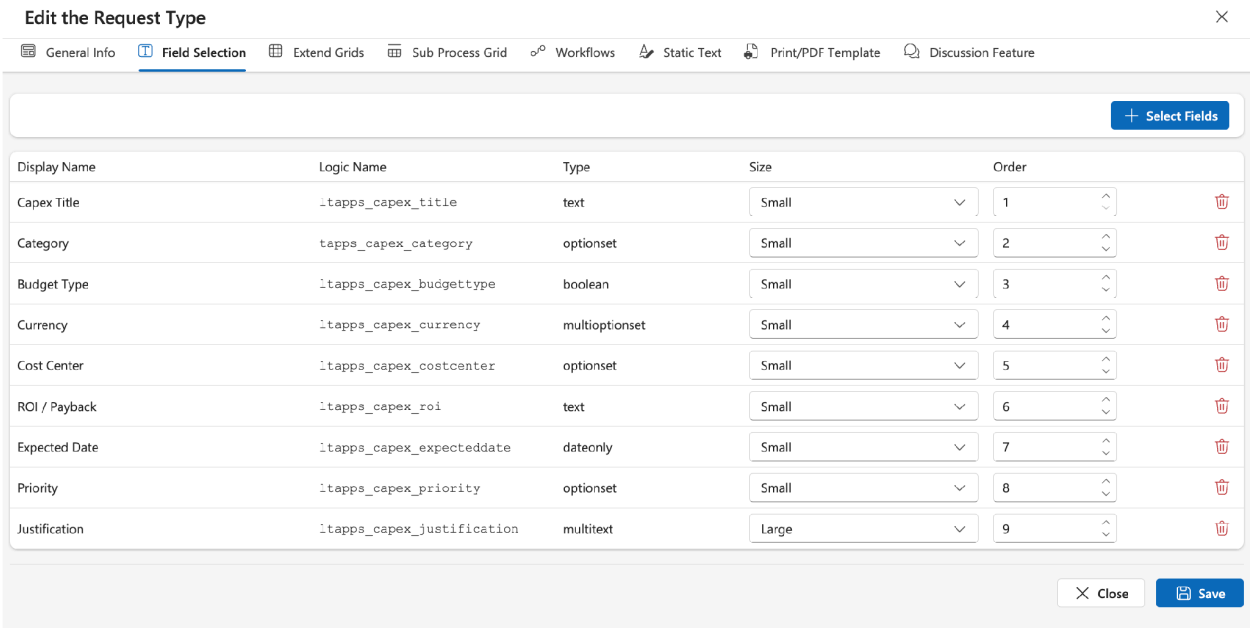
- **SLA Toggle:** Enable or disable SLA tracking.
- **Target Duration:** Define the expected completion time by entering a numerical value and selecting a time unit (e.g., 24 Hours or 2 Days).
- **Calculation Mode:**
    - *Business Time:* Calculates processing deadlines by automatically skipping weekends and the submitter's country-specific public holidays, ensuring fair tracking.
    - *Calendar Time (24/7):* Calculates deadlines continuously, regardless of weekends or holidays (ideal for critical 24/7 operations like IT Incident Reports).

Submission Access Strictly control who is permitted to view and submit this specific type of request. This is particularly useful for department-specific workflows (e.g., only the Finance team can submit a CAPEX request).

- **The Users:** Grant submission access to specific individuals.
- **The Teams:** Grant access to specific Microsoft Entra ID or Dataverse teams.
- **The Business Units:** Restrict access to entire Dataverse Business Units.
- *Note:* If 'Users', 'Teams', and 'Business Units' are all left empty, the request type will be globally accessible to all users within the organization.

Field Section

The Field Selection tab is the primary form builder interface. Once you have defined your custom data fields in the global Field Setup settings, you use this tab to assemble and structure the specific data entry form for this Request Type.



Adding Fields to the Form To construct your form, click the blue **"+ Select Fields"** button located at the top right of the grid. This will open a dialog allowing you to search and pull in the pre-configured custom fields relevant to this workflow (e.g., Capex Title, Category, Expected Date).

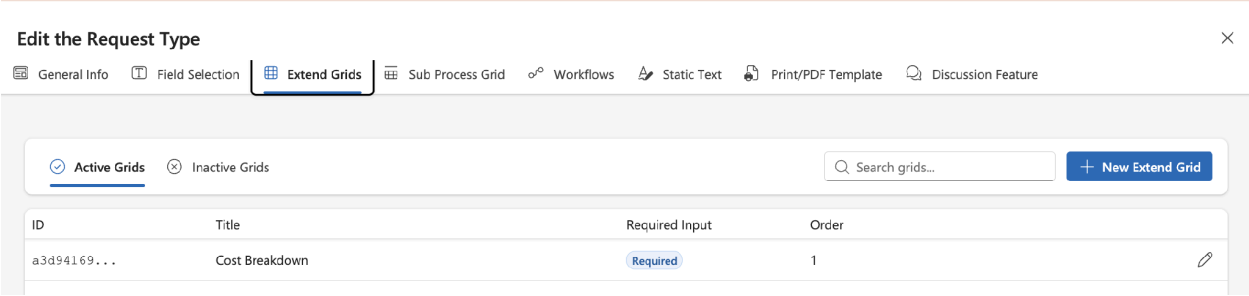
Managing Form Layout and Properties Once fields are added to the grid, you can manage how they render on the end-user's screen using the available configuration columns:

- **Display Name:** The user-friendly label that will appear next to the input field on the form.
- **Logic Name:** The underlying database schema name (e.g., ltapps_capex_title). This is a read-only identifier used internally for reporting and workflow variables.
- **Type:** The data format of the field (e.g., text, optionset, boolean, dateonly, multitext). This dictates what kind of input control is rendered (like a calendar picker for dates or a dropdown for option sets).
- **Size:** Control the physical width of the field on the user interface.
    - *Small:* The field will take up a fraction of the screen width (depending on the Number of Columns setting in the General Info tab).
    - *Large:* The field will span wider, which is ideal for multitext (multi-line text) fields like Justification or Descriptions.
- **Order:** Define the sequential flow of the form. Enter numerical values to dictate the top-to-bottom, left-to-right arrangement of the fields.

- **Remove Field (Trash Icon):** Click the red trash can icon to remove a field from this specific Request Type form. Note: This only removes it from the current layout; it does not delete the field from the global system database.

Extend Grids

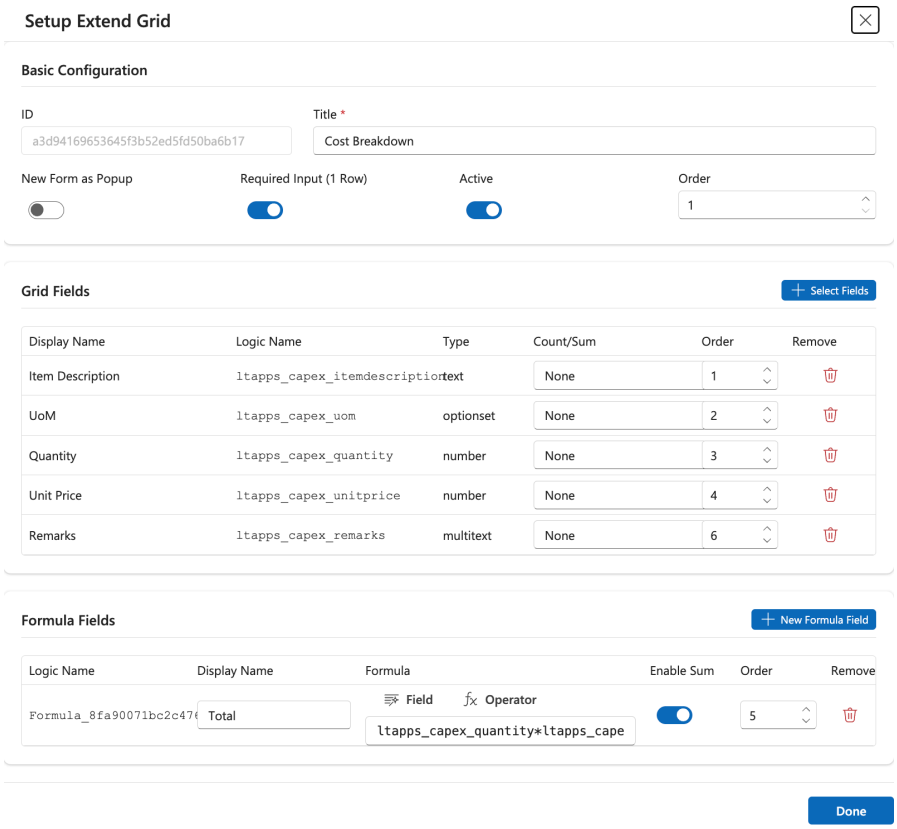
The Extend Grids tab allows you to add sub-forms (also known as nested tables or line items) to your main request form. This is essential for scenarios where a single request requires multiple entries, such as listing multiple items on a Purchase Request or adding several receipts to an Expense Claim.



Managing Active Grids On the main tab, you will see a list of all grids currently associated with this request type.

- **Active / Inactive Tabs:** Toggle between currently used grids and those that have been disabled.
- **Search:** Use the search bar to quickly locate a specific grid if you have multiple configured.
- **Edit:** Click the pencil icon next to an existing grid (e.g., Cost Breakdown) to modify its structure.
- **New Extend Grid:** Click this blue button to create a completely new sub-form.

Setup Extend Grid (Configuration Panel) When you edit or create a new grid, the Setup Extend Grid panel appears, offering deep customization for the sub-form's behavior and calculations.



Basic Configuration

- **Title:** The display name of the grid section on the End-User form (e.g., Cost Breakdown).
- **New Form as Popup:** Toggle this on to have the data entry fields for a new line item open in a clean popup window, rather than inline. This provides a better user experience for complex grids.
- **Required Input (1 Row):** If enabled, the submitter is forced to add at least one line item to this grid before they are allowed to submit the entire request.
- **Active:** Enable or disable the grid.
- **Order:** Determine the grid's position on the main form relative to other grids.

Grid Fields Click **"+ Select Fields"** to pull data fields into this specific sub-grid. Similar to the main form builder, you can manage the layout:

- **Display Name & Logic Name:** Identify the field.
- **Count/Sum:** This is a powerful feature for numerical fields (like Quantity). You can set it to automatically calculate the Sum (total) or Count of all line items entered by the user, displaying a running total at the bottom of the grid.

- **Order:** Set the left-to-right column order of the fields within the grid.

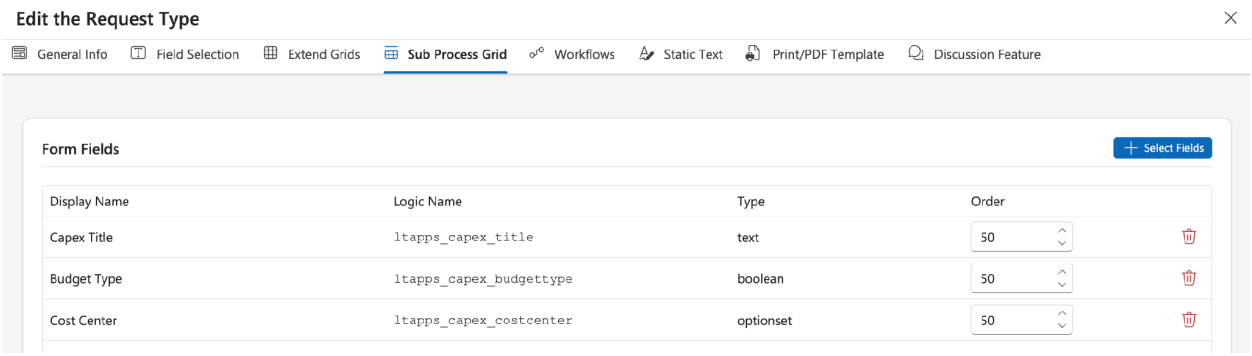
Formula Fields This section allows you to create dynamic calculated columns without requiring the user to do manual math.

- **New Formula Field:** Click to add a calculated column.
- **Display Name:** What the user sees (e.g., Total).
- **Formula:** Construct the calculation using the Field and Operator buttons. For example, to calculate a line item total, you would build the formula: `[ltapps_capex_quantity] * [ltapps_capex_unitprice]`.
- **Enable Sum:** Toggle this on to automatically calculate and display the grand total of this calculated column at the bottom of the grid.

Sub Process Grid

The Sub Process Grid tab is specifically utilized when you are managing Parent-Child workflow relationships (as defined by the "Is Sub" toggle in the General Info tab).

If a parent request generates or links to multiple child sub-requests, this tab allows you to define exactly which data fields from those child requests will be displayed as summary columns in the grid on the parent request's form.



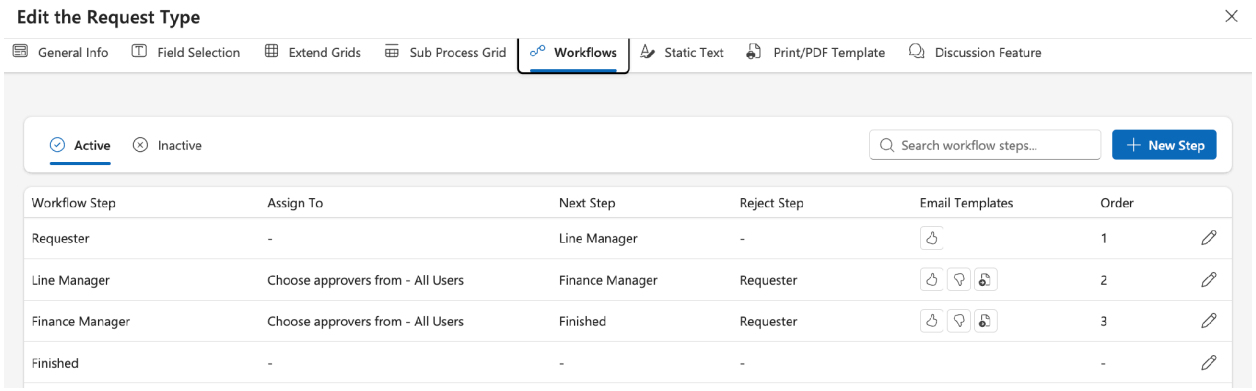
Configuring the Sub Process Grid To build the summary grid, you will select and arrange the fields that give the parent approver the best quick-glance context of the child items.

- **+ Select Fields:** Click this blue button to open the field picker. Select the specific data points from the sub-request (e.g., Capex Title, Budget Type, Justification) that you want to expose in the parent's summary grid.
- **Display Name:** This acts as the column header visible to the users when they look at the grid.
- **Logic Name & Type:** These read-only columns display the system identifier and the data format (e.g., text, boolean, multitext) to help administrators ensure they have selected the correct field.

- **Order:** Determine the left-to-right sequence of the columns in the grid. Use numerical values to set the layout (e.g., Order 1 will be the furthest left column).
- **Remove (Trash Icon):** Click the red trash can icon to remove a column from the summary grid. Note: Removing a field here only hides it from the parent grid view; it does not delete the data or remove the field from the actual sub-request form.

Workflows

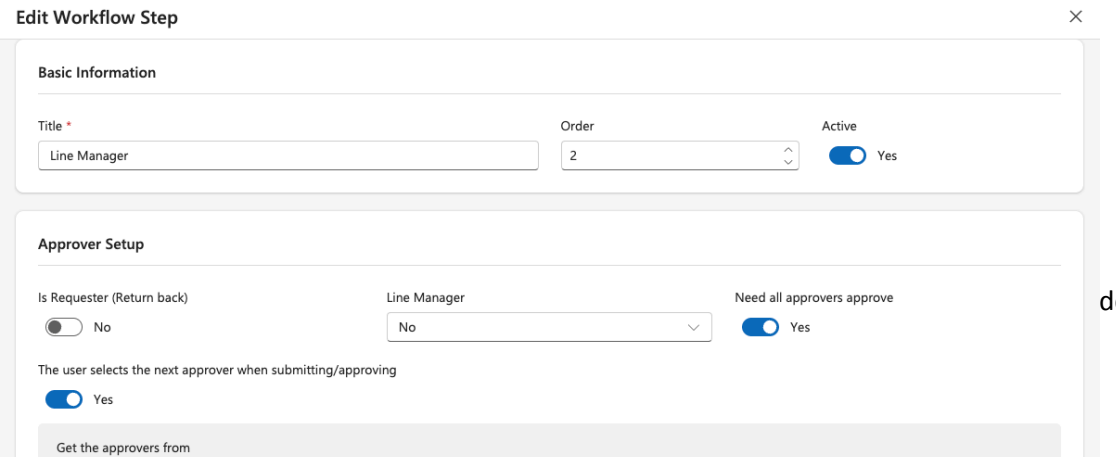
The Workflows tab is the powerful routing engine of the Approval Hub. Here, you define the exact sequence of stages a request must navigate from submission to final completion. You can build simple sequential approvals or highly complex, condition-based branching paths.



Managing Workflow Steps The main view provides a high-level visual map of the entire process (e.g., Requester -> Line Manager -> Finance Manager -> Finished).

- **Active / Inactive:** Toggle views to manage current or deprecated steps.
- **List Columns:** At a glance, you can see who is assigned to each step, where the request goes next, where it returns if rejected, and which email templates are triggered (indicated by the thumbs up/down icons).
- **+ New Step:** Click this blue button to add a new stage to your workflow.
- **Edit (Pencil Icon):** Click the pencil icon to configure the deep logic of an existing step.

Edit Workflow Step (Detailed Configuration) When creating or editing a specific step within your workflow (e.g., Line Manager Review), the configuration panel is broken down into highly customizable operational areas:



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Basic Information

- **Title:** The display name of the step as it will appear in the system, audit logs, and on the End-User's tracking timeline (e.g., Finance Manager Review).
- **Order:** The numerical sequence of the step (e.g., step 2 happens after step 1).
- **Active:** A toggle to enable (Yes) or temporarily disable (No) this specific stage without deleting it.

Approver Setup This critical section dictates exactly who receives the task and has the authority to process the request at this stage. You have multiple routing strategies:

- **Is Requester (Return back):** Enable this toggle if this step is designed as a correction loop, sending the form back to the original submitter.
- **Line Manager:** Utilize organizational hierarchy. You can automatically route the request to the submitter's direct manager (e.g., Manager Level 1, Manager Level 2).
- **Need all approvers approve:** If multiple individuals are assigned to this step, enabling this enforces unanimous consensus—every assigned person must click "Approve" before the workflow can advance.
- **Manual Selection (The user selects...):** If enabled, the person completing the preceding step must manually choose the next approver from a predefined list.
- **Assign to specific team/users:** If none of the dynamic options above are used, you can hardcode the approvers for this step:
    - *Users:* Select one or more specific individuals (e.g., Approver 1, Approver 2).
    - *A Team:* Assign the task to an entire Dataverse/Entra ID Team. Any member of that team can claim and approve the request.

Workflow Routing This is where you build the "brain" of the workflow, using dynamic branching logic based on the data entered in the form.

- **Conditional Routing (+ Add Condition Next Step):** Create rules to bypass standard steps. For example, you can build a condition:
    - *Field Name:* (CAPEX - Cost Breakdown) Total
    - *Operator:* Lower Than or Equal
    - *Value:* 5,000
    - *Next Step:* Route directly to Finished (bypassing the Finance Manager if the cost is low).
- **Default Next Step:** If the request does not meet any of your custom conditions, it will default to this path (e.g., route to Finance Manager).

- **Reject: Back to step:** Define exactly where the workflow should revert if the current approver clicks "Reject" (e.g., return it to the Requester to start over).

Permissions & Editing Control what data the approver at this specific stage is allowed to modify.

- **Allow Edit Fields:** If enabled (Yes), the approver can alter the data submitted by the requester.
    - *Form Fields:* You can select specific fields they are allowed to edit. Note: If you leave this blank, the approver will have full access to edit all fields on the main form.
    - *Extend Grid (Cost Breakdown) allows edit:* You can grant permission to modify line items within specific sub-grids.
- **Allow Edit Attachments:** If enabled (Yes), the approver can add, remove, or modify the supporting files attached to the request.

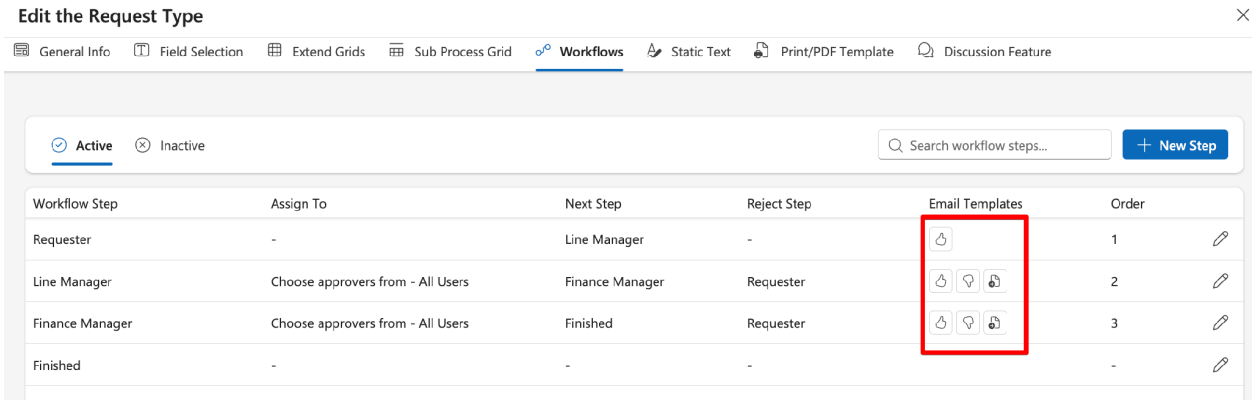
Advanced Settings

- **Custom Buttons Configuration:** Override the default system buttons to match your business context. For example, you can rename the "Approve" button to "Verify" or "Acknowledge". You can also hide specific buttons (like Reassign Button) by toggling the Display switch to off.
- **Allow Set Urgent:** Permit the approver at this stage to flag the request as high priority for the next person in line.
- **Custom Status Text:** Instead of a generic "Pending" status, define exactly what the End-User sees when tracking their request (e.g., Pending LM Approve).
- **Enable SLA:** Attach a specific Service Level Agreement (SLA) timer strictly to this individual step to monitor the approver's turnaround time.

Email Templates

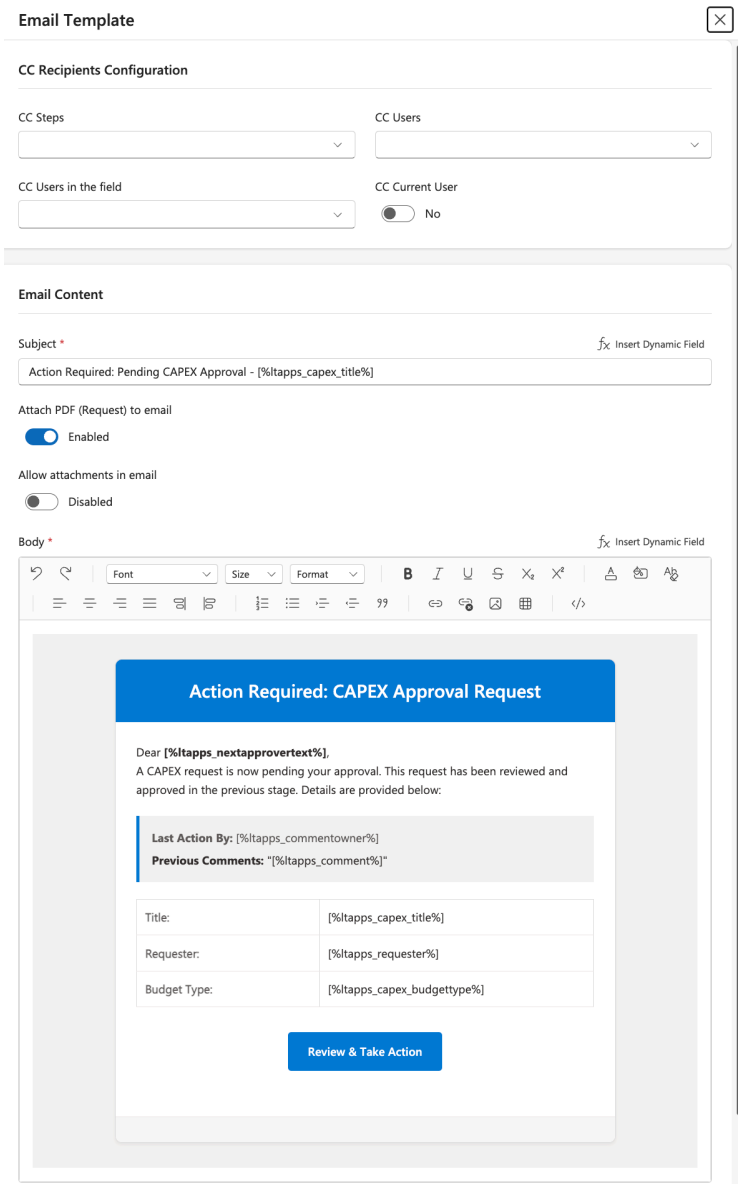
The Email Templates module allows you to standardize and automate all system-generated communications. This ensures that requesters, approvers, and other stakeholders are kept informed throughout the lifecycle of a request.

1. Managing Templates per Workflow Step You can configure specific email triggers for each workflow stage. In the "Email Templates" column, you can define actions for different outcomes:



- **Approval Request (Thumbs Up icon):** Triggered when a request moves to a user's queue.
- **Rejection (Thumbs Down icon):** Triggered when an approver rejects a request, automatically notifying the requester with the reason for rejection.
- **Delegation/Reassignment (Document icon):** Triggered when a task is forwarded or delegated to another user.

2. Configuring an Email Template When you click to edit or create a template, the Email Template configuration panel allows you to customize the content to fit your corporate branding and communication style:



CC Recipients Configuration You can automatically copy stakeholders on emails without requiring them to be direct approvers:

- **CC Steps:** Automatically CC users who were involved in previous workflow steps.
- **CC Users:** Manually select specific individuals to always receive notifications for this step.
- **CC Users in the field:** Dynamically add users listed in specific form fields (e.g., CC the "Project Lead" field).
- **CC Current User:** Toggle to automatically CC the person who performed the last action.

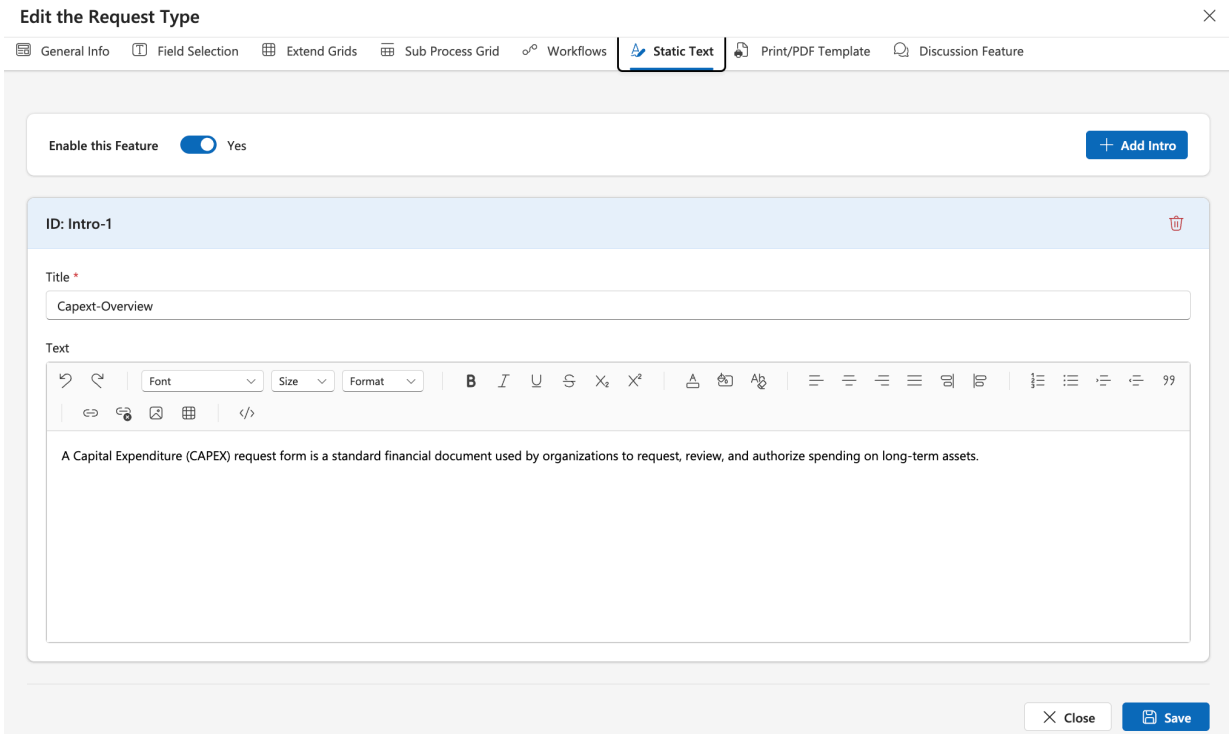
Email Content & Personalization The system provides a robust visual editor for email creation:

- **Subject:** Define a clear subject line. Use the "Insert Dynamic Field" function to include real-time data, such as `[%ltapps_capex_title%]`, ensuring the email is easily identifiable in the recipient's inbox.
- **Advanced HTML Customization:** For advanced formatting or to match your specific corporate email branding, click the "<> " (Source Code) icon in the editor toolbar. This allows you to view and edit the raw HTML and CSS of your email template directly.
- **Attachment Controls:**
    - *Attach PDF (Request):* When enabled, the system automatically generates a snapshot of the request form as a PDF and attaches it to the email.
    - *Allow attachments in email:* Toggle this to permit the inclusion of original documents uploaded during the submission process.
- **Dynamic Fields:** Utilize the editor to design professional email bodies. You can incorporate dynamic tags to pull request details—such as `[%ltapps_comment%]`, `[%ltapps_requester%]`, or `[%ltapps_nextapprovertext%]`—ensuring that every notification is contextually relevant.

Always remember to click the Save button after finalizing your template changes to ensure that all future system notifications reflect your updated design.

Static Text

The Static Text tab allows you to embed informational headers, instructions, or policy disclaimers directly into the request form. This is an excellent way to provide guidance to users exactly where they need it—at the top of the form before they begin data entry.



1. Enabling and Managing Content

- **Enable this Feature:** Use this toggle to turn the Static Text display on or off for this specific Request Type.
- **Add Intro:** Click this button to create a new content block. You can add multiple blocks of static text if you need to separate different instructions into distinct sections.
- **Delete (Trash Icon):** If you no longer need a specific section of static text, click the trash icon to remove the block entirely from the form.

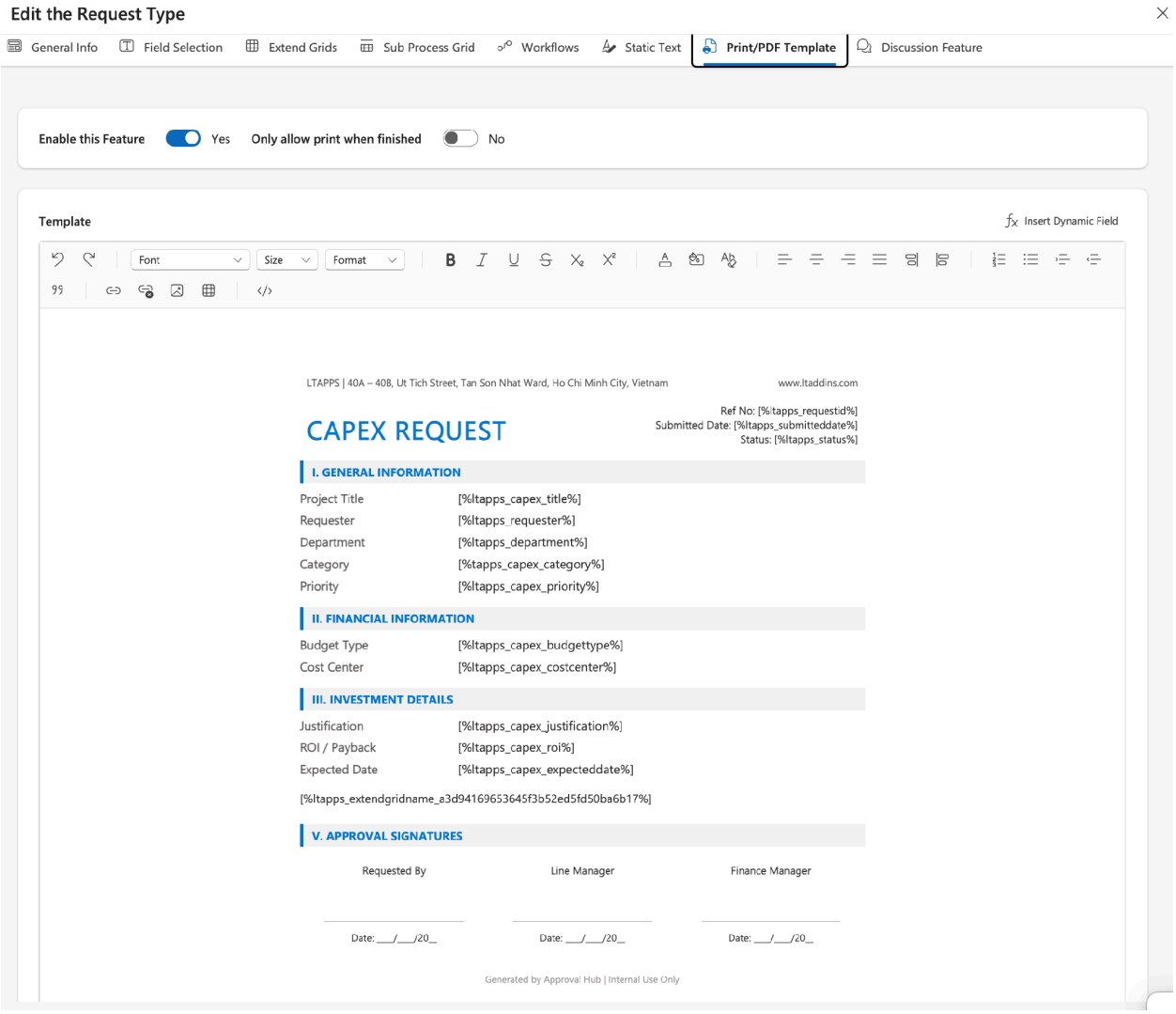
2. Configuring the Content Block Each content block provides you with the flexibility to present information clearly:

- **Title:** Enter a header for the section (e.g., Capex Overview or Important Submission Policy).
- **Rich Text Editor:** Use the built-in toolbar to style your text. You have full control over font formatting (bold, italic, underlining), bulleted/numbered lists, text alignment, and colors.
- **Advanced HTML Customization:** Similar to the Email Templates module, you can click the "<>" (Source Code) icon in the toolbar. This allows you to insert custom HTML and CSS, which is useful for embedding advanced layout elements, specific branded styling, or complex formatting that standard rich text cannot achieve.

- **Media and Links:** The editor supports inserting hyperlinks (e.g., linking to your internal corporate policy pages) and images to make your instructions even clearer for the End-User.

Print/PDF Template

The Print/PDF Template tab allows you to design custom document layouts that can be generated directly from a request. This feature is essential for businesses that require official hardcopies, physical archiving, or signed documentation (e.g., CAPEX requests, formal contracts, or official leave letters).



A. Global Print Settings At the top of the interface, you can control the accessibility of the printing feature:

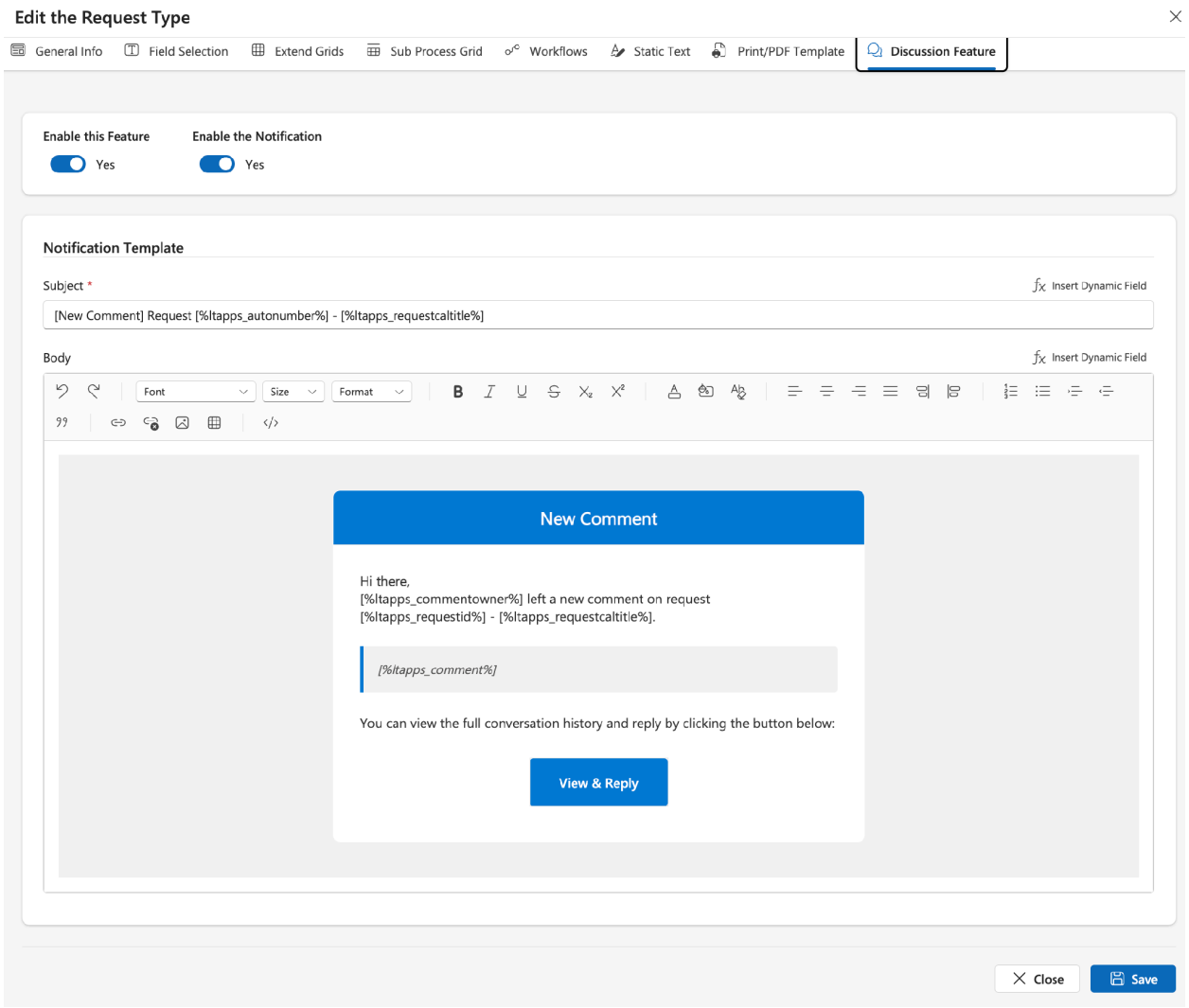
- **Enable this Feature:** Toggle this to "Yes" to allow users to generate a PDF/Print version of the request.
- **Only allow print when finished:** If enabled, this enforces a strict business rule where the Print/PDF export is only available once the workflow has reached the "Finished" status. This ensures that only finalized, official versions of the document are archived.

B. Designing the Document Template The core of this tab is a rich-text editor that functions similarly to a standard document creator, allowing you to build the professional structure of your request form:

- **Template Builder:** Use the toolbar to design your document. You can add company logos, headers, standardized contact information, and professional footers.
- **Dynamic Fields:** Use the "Insert Dynamic Field" button to populate the document with live request data. By inserting fields such as `[%ltapps_requestid%]`, `[%ltapps_requester%]`, or `[%ltapps_capex_title%]`, the system will automatically inject the specific details of the individual request into the generated PDF.
- **Advanced HTML Customization:** For advanced document formatting—such as precise margin control, complex table borders, or specific brand-compliant CSS—click the "<> " (Source Code) icon in the toolbar. This gives you full control over the raw HTML and CSS of your document layout.
- **Structured Sections:** Organize the data into professional sections (e.g., "General Information," "Financial Information," and "Investment Details") to mirror the organization of your digital form.
- **Signature Blocks:** You can pre-configure dedicated signature areas at the bottom of the template, complete with date placeholders, providing space for physical wet-ink signatures if required by your internal audit process.

Discuss Feature

The Discussion Feature tab enables collaboration and real-time communication directly within each request. Instead of relying on fragmented external chats or separate emails, requesters and approvers can converse, clarify information, and log discussions right on the request timeline.



Feature Activation At the top of the panel, you can control how the system handles collaboration:

- **Enable this Feature:** Toggle this to "Yes" to activate the comment and discussion block on the user interface for this specific Request Type.
- **Enable the Notification:** Toggle this to "Yes" to ensure that the system automatically broadcasts automated emails whenever a new comment is posted, keeping all involved parties engaged in the loop.

Configuring the Notification Template When notifications are enabled, you can customize the email template that alerts users to new comments:

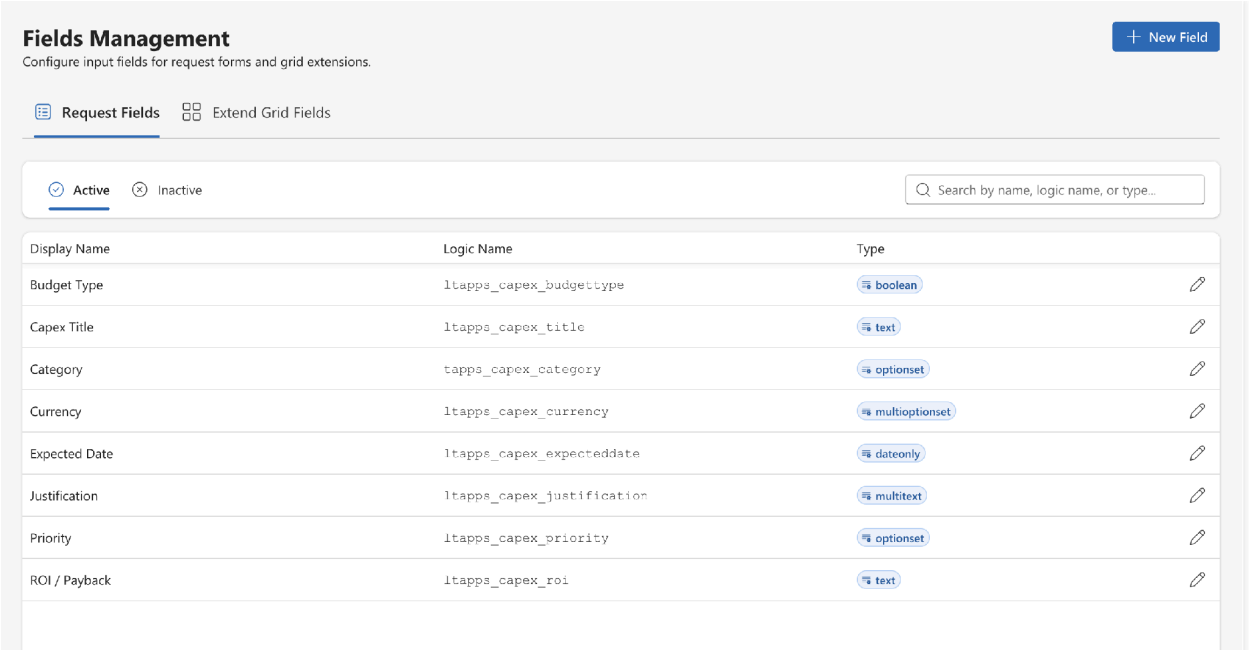
- **Subject:** Define a clear subject line for discussion notifications. You can use the "Insert Dynamic Field" button to inject real-time tracking data, such as `[%ltapps_autonumber%]`

and `[%ltapps_requestcaltitle%]`, ensuring users know exactly which conversation requires their attention.

- **Rich Text Editor & Advanced HTML:** Design the email layout using the standard styling options (fonts, formatting, alignment). For deeper design customization or to adapt the notification to your corporate design systems, click the "<>" (Source Code) icon to paste or edit raw HTML/CSS.
- **Dynamic Tokens:** Personalize the alert body by adding contextual placeholders.

5. Fields Setup

The Fields Management module acts as the central data dictionary for your application. Before you can add any data input block to a request form or a nested sub-form, the field must first be defined in this section.

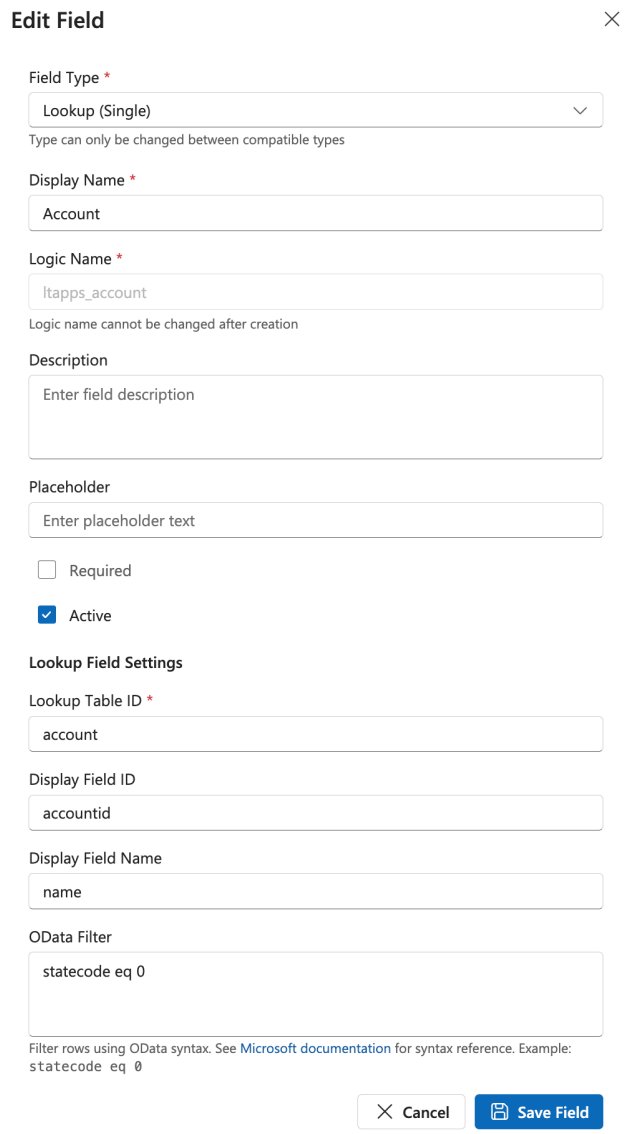


The interface is divided into two main tabs to keep your database organized:

- **Request Fields:** Global fields intended for use on main request forms (e.g., Justification, Capex Title).
- **Extend Grid Fields:** Dedicated fields designed specifically to be used as columns tables (e.g., Quantity, Unit Price, Item Description).

Creating a New Field: Core Properties

To create a new data input, click the "+ New Field" button. Every field shares a standard set of core properties that must be configured:



- **Field Type:** Determines the format of the data (e.g., Text, Number, Date). Note: Type can only be changed between compatible formats after creation.
- **Display Name:** The user-facing label that appears next to the input box on the form.
- **Logic Name:** The internal database schema name. The system automatically prefixes this with your namespace (e.g., ltapps_capex_category). Important: This cannot be changed after creation.
- **Description:** An internal note for administrators explaining the field's purpose.

- **Placeholder:** Ghost text that appears inside the empty input box to guide users (e.g., "Enter your justification here...").
- **Required:** Check this box to make the field mandatory, preventing users from submitting the form if it is left blank.
- **Active:** Controls the field's availability. Unchecking this prevents the field from being added to new forms, but preserves historical data.

Specialized Field Type Configurations

Depending on the Field Type selected, the configuration panel will dynamically display additional settings tailored to that specific data format:

Choice (Single / Multiple) Used to create standardized dropdown menus.

- **Choices:** Use the "+ Add Choice" button to define the list of selectable items (e.g., IT, Facilities, Vehicles).
- **Default Value:** Optionally set a pre-selected baseline value to speed up data entry.

Date and Time / Date Only Used for capturing deadlines, event dates, or system timestamps.

- **Default to current date and time:** Automatically populates the field with the exact moment the user opens the form.
- **Time Constraints:** For Date and Time fields, you can restrict the selection window by defining the Start Hour and End Hour (e.g., limiting selection to working hours between 08:00 and 17:00), and set specific Time Increments (e.g., 30-minute intervals).

Lookup (Single / Multiple) Connects your form directly to other database tables within Dataverse to pull existing records.

- **Lookup Table ID:** The schema name of the target table (e.g., account).
- **Display Settings:** Map the specific Display Field ID and Display Field Name to determine what text is actually shown to the end-user.
- **OData Filter:** Use standard OData syntax to restrict the available records. For example, entering `statecode eq 0` ensures only "Active" records appear in the lookup list.

User (Single / Multiple) A specialized lookup linked to your organization's Microsoft Entra ID directory.

- **Default to current user:** Automatically populates the field with the logged-in submitter.
- **OData Filter:** Filter the user directory (e.g., `isdisabled eq false` to only show active employees, or filter by specific departments).

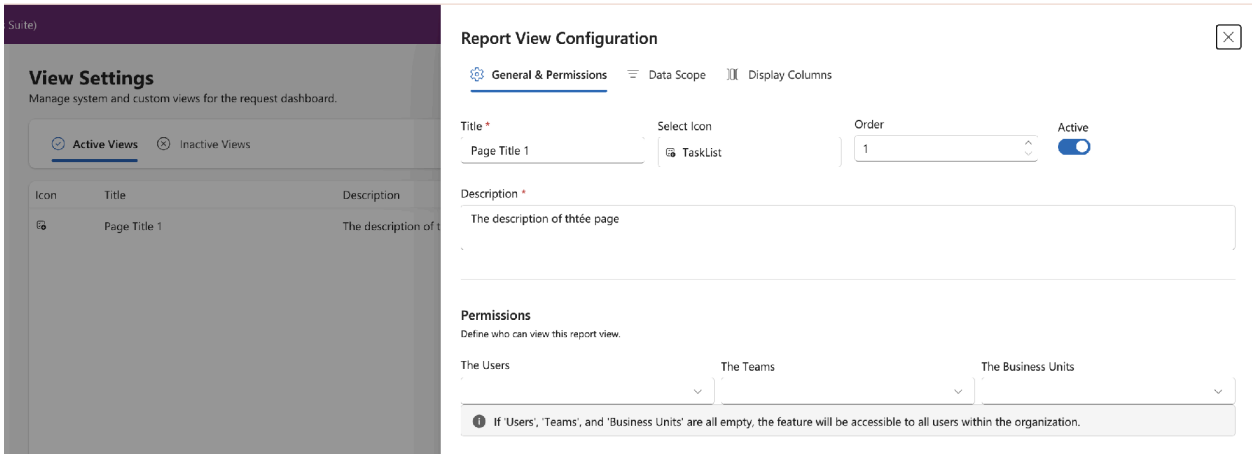
Standard Text & Numeric Fields

- **Single Line of Text:** Standard input. You can restrict input length using the Maximum Length parameter.
- **Multiple Lines of Text:** Generates a larger, expandable text area for detailed descriptions.
- **Number:** Restricts the user to inputting only numeric characters.

6. Explorer Views

The Explorer Views module provides system administrators with control over how data is queried, filtered, and displayed across the application's dashboards and list views. By configuring custom views, you determine the exact columns end-users and managers see when searching or auditing requests, ensuring data security and cross-departmental relevance.

To manage your system views, navigate to Settings > Explorer Views. From the main dashboard, you can search existing grids, manage Active/Inactive Views, or click the blue + New View button to launch the Report View Configuration engine.



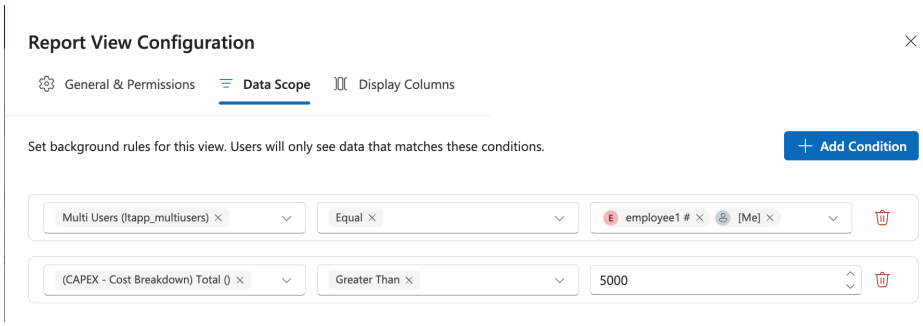
The view configuration process is divided into three functional tabs:

General & Permissions Tab This tab establishes the identification and security scope of the specific report view.

- **Title:** Enter a unique, descriptive name for the view as it will appear in the dashboard dropdown menus.
- **Select Icon:** Choose a visual identifier from the Fluent UI library to represent this list.
- **Order:** Define the numerical sequence of the view in list menus (e.g., lower numbers appear at the top).
- **Active Toggle:** Enable or temporarily disable the visibility of this view across the platform.

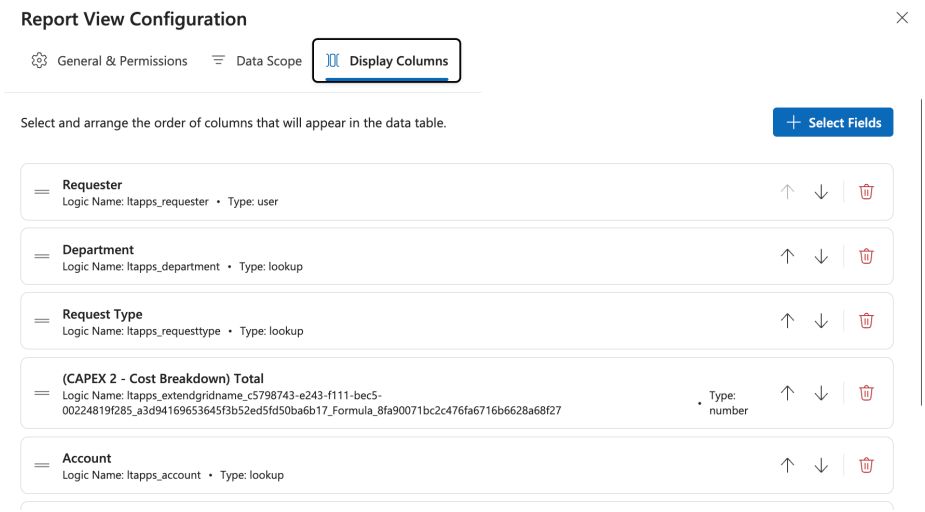
- **Description:** Provide internal context regarding what information this query captures.
- **Permissions Matrix:** Strictly dictate who has the authority to load this specific view. Access can be limited by selecting specific individuals (The Users), dedicated directory divisions (The Teams), or entire organizational hierarchies (The Business Units).
    - *Note:* If all permission fields are left empty, the view defaults to global accessibility and can be used by all users within the organization.

Data Scope Tab The Data Scope tab serves as a visual query builder, allowing you to define background rules that filter out irrelevant records. Users loading this view will only see data that matches the strict conditions specified here.



- **Dynamic Rule Binding:** Click + Add Condition to implement background criteria.
- **Field Selection:** Select from any system or custom-created field schema (including complex calculated sub-grid attributes like total cost breakdowns or dynamic priority tags).
- **Logical Operators:** Refine how data maps against validation metrics using standard parameters:
    - *Equal / Not Equal:* Enforces precise keyword, user identification, or numerical string matching.
    - *Greater Than / Greater Than or Equal:* Sets low-end numeric thresholds.
    - *Lower Than / Lower Than or Equal:* Sets ceiling caps or deadline limits.
- **Target Value:** Hardcode parameters or utilize dynamic system values (such as filtering against the active logged-in employee record using the `[Me]` token).

Display Columns Tab This final tab dictates the exact presentation layout of the data table grid rendered on the user interface.

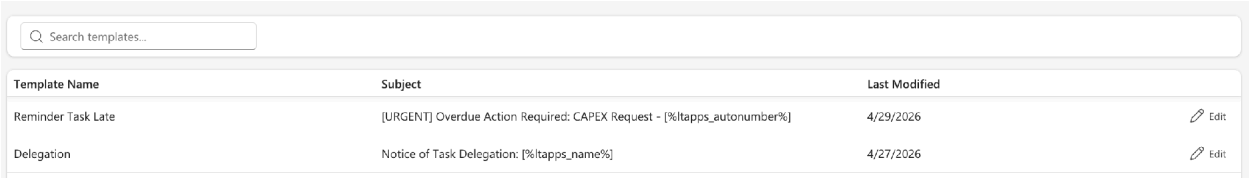


- **Field Selection Mapping:** Click + Select Fields to pull defined data attributes into the reporting grid view.
- **Column Ordering:** Use the Up/Down arrows next to any listed field to adjust the left-to-right column progression of the live table.
- **Field Data Awareness:** The configuration grid displays the specific database Logic Name and data Type (e.g., text, user, lookup, datetime, option+set, boolean) to ensure administrators map data models correctly.
- **Column Extraction (Trash Icon):** Click the red trash can icon to instantly drop a column from the presentation table without altering any stored database assets.

7. Notification Templates

The global Notification Templates module under Settings manages automated, system-wide email communications triggered by system events rather than specific workflow steps. These templates govern critical system actions, such as late task escalation reminders and formal task delegation configurations.

From the main summary dashboard, administrators can view all registered system templates, verify their active subject lines, track the Last Modified date, and use the search query bar to isolate specific configurations. Clicking the pencil Edit icon launches the specialized configuration designer.



The template customization dashboard is structured into two main control regions:

A. CC Recipients Configuration This section allows administrators to maintain transparency by automatically looping in auxiliary stakeholders whenever a system alert fires.

- **CC Users:** A dedicated dropdown menu to hardcode specific management accounts, security groups, or audit personnel who must monitor all system alerts of this category (e.g., automatically copying the IT Admin team on all escalation or delegation alerts).

B. Email Content & Personalization Layout The core engine provides a robust rich-text designer to build corporate, brand-compliant message frameworks.

- **Subject Line:** Enter the primary email subject header. Administrators can utilize the "Insert Dynamic Field" tool to map dynamic, contextual parameters—such as the request sequence token `[%ltapps_autonumber%]` or process titles `[%ltapps_name%]`—guaranteeing high visibility in users' inboxes.
- **Rich Text Editor Toolbar:** Standard formatting parameters allow comprehensive layout manipulation, including custom font choices, sizing constraints, list parameters, alignment adjustments, and hyperlinked navigation assets.
- **Advanced HTML Customization:** For precise layout control or deep alignment with your organization's corporate styling sheets, clicking the "<> " (Source Code) icon opens the raw HTML editor pane to paste or construct custom web layouts directly.
- **Dynamic Data Tokens:** Personalize the email notification canvas with automated transactional tokens based on the type of system alert:

Case Study 1: Overdue Task Reminder Templates Designed to automatically prod inactive approvers when an attached Service Level Agreement (SLA) milestone fails to meet compliance.

- `[%ltapps_nextapprovertext%]`: Target line manager or reviewer holding the bottlenecked process.
- `[%ltapps_day_overdue%]`: Live countdown tracking exactly how many operational business days the task has breached its deadline.
- `[%ltapps_duedate%]`: The official target expiration milestone.
- `[%ltapps_requestid%]`, `[%ltapps_requestcaltitle%]`, `[%ltapps_requester%]`: Baseline operational metrics identifying the source file context.
- **Call-to-Action (CTA) Element:** A clear, high-contrast action button (e.g., "REVIEW & ACTION NOW") to seamlessly bridge the recipient directly onto the pending record.

Case Study 2: Task Delegation Notice Templates Triggered instantly when a user maps out an out-of-office rule or a system administrator redirects permissions to an authorized proxy.

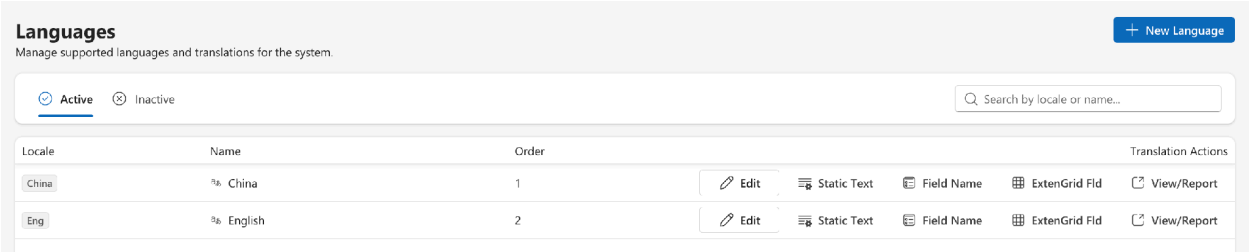
- `[%ltapps_delegatee%]`: The proxy user receiving temporary authority.

- `[%ltapps_delegator%]`: The original owner offloading the task lifecycle.
- `[%ltapps_scope%]`: The administrative boundary of permissions being conceded.
- `[%ltapps_startdate%]` / `[%ltapps_enddate%]`: The explicit temporal window validating the delegation protocol.

8. Languages

The Languages module gives system administrators full control over localization and multi-language capabilities across the platform. This module ensures that multinational business units can interact with the system using their preferred regional dialect, localizing core UI components, input forms, and data grid labels.

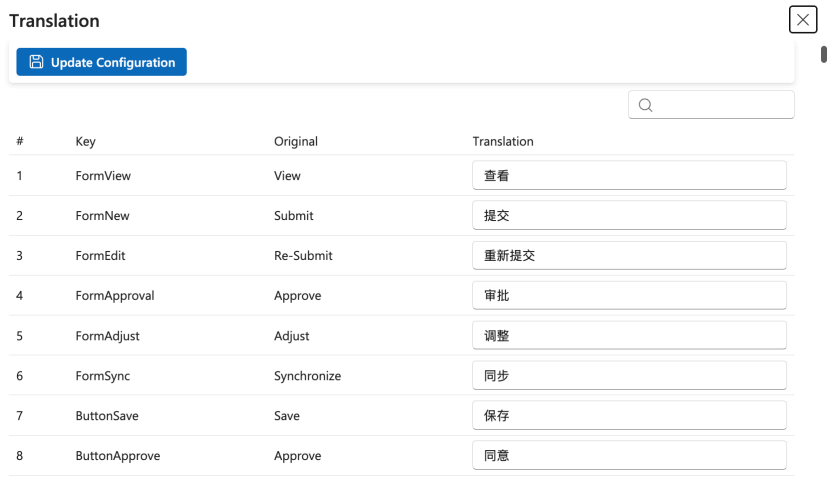
To access the localization suite, navigate to Settings > Language. The primary dashboard displays a registry of all added locales, their sorting display order, and a toggle to handle Active/Inactive visibility status. Clicking + New Language allows you to register a new region profile using the standard parameters: Locale Code, Title, Order, and Active Status.



Managing Translations (Translation Actions) Rather than using a single, fragmented translation file, the platform separates localization into specific business contexts. From the main language registry grid, administrators can manage precise translation matrices by executing specialized actions across distinct system regions:

- **Static Text Translation:** Opens a configuration matrix to translate localized core application text blocks, hardcoded interface descriptors, placeholder tooltips, and informational instructions.
- **Field Name Translation:** Maps localized text to data schema elements within standard request forms. This handles structural database components (e.g., translating a core key like ltapps_capex_title from its original string value "Capex Title" into target localized variations).
- **ExtenGrid Fld Translation:** A dedicated localization engine designed exclusively to handle translations for data columns embedded within nested sub-forms, tables, and line-item grids (e.g., Quantity, Unit Price, UoM).
- **View/Report Translation:** Manages string translations for custom data views built inside the Explorer Views module. This translates metadata parameters, including the structural View Title and View Description keys linked to unique system dashboard GUIDs.

Working inside the Translation Editor Pane Clicking any translation category launches a clean interface grid engineered to streamline mapping tasks:

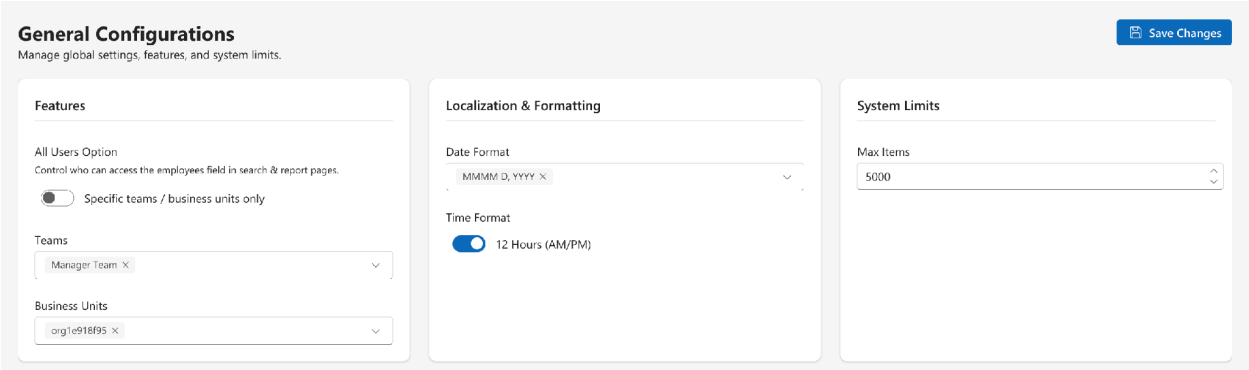


1. **System Key Indexing:** Each UI element displays its immutable backend database identification Key alongside its baseline deployment wording (Original).
2. **Translation Input Grid:** Administrators can type customized region-specific text strings directly into the corresponding Translation text field input blocks (e.g., localized system operations like translating the original button string "Submit" into standard system equivalents like Chinese "提交" or Vietnamese "Gửi").
3. **Search Query Filter:** Utilize the top-right text search box to instantly isolate specific keys, button strings, or field labels without scrolling through large localization datasets.

9. General Configurations

The General Settings module handles the global parameters, formatting baselines, and environmental data caps that dictate how the entire platform operates. Changes applied within this panel establish overarching governance policies across all active workflow channels, dashboards, and reporting metrics.

To manage your system environment baselines, navigate to Settings > General Settings. The dashboard segregates global properties into three dedicated configuration matrices:



A. Features Matrix This section manages organizational user visibility parameters within application exploration environments.

- **All Users Option Toggle:** This toggle controls data boundary constraints regarding who can pull up employee profiles or navigate staff-centric parameters across the centralized search and reporting modules.
    - *Specific teams / business units only (Disabled):* When kept off, the user-lookup fields remain globally unconstrained.
    - *Specific teams / business units only (Enabled):* Activating this option restricts lookups to isolated sectors, enforcing strict confidentiality.
- **Teams Selector:** Hardcode specific directory groups (e.g., Manager Team) to delegate unique operational visibility rights.
- **Business Units Selector:** Map specific enterprise divisions or organizational node GUIDs (e.g., org1e918f95) to assign isolated access permissions across target entity streams.

B. Localization & Formatting Matrix This column standardizes temporal and calendar data parsing rules to keep your interface clean and unified across various regions.

- **Date Format Selection:** A dropdown menu used to map default system-wide temporal string masks. Selecting a format (e.g., MMMM D, YYYY) standardizes text layouts across all active submission dashboards and exported auditing sheets (translating inputs to readable metrics like May 24, 2026).
- **Time Format Toggle:** Defines how the system parses hourly timestamps.
    - *12 Hours (AM/PM) Enabled:* Enforces a standard 12-hour clock layout complete with AM/PM indicators.
    - *Disabled:* Switches the system interface to display standard military or 24-hour timestamp logs.

C. System Limits Matrix This card protects system data structures from running sluggishly during periods of high transactional traffic by setting operational safety boundaries.

- **Max Items Validation Box:** Establishes a strict upper bound cap on the maximum number of transactional records or line items that can be handled simultaneously within individual processing windows, grid outputs, or mass query loops (e.g., capping structural grid operations to a maximum of 5000 items).