



# LEAVE REQUEST PRO for SharePoint

Configuration guide

Version 3.1



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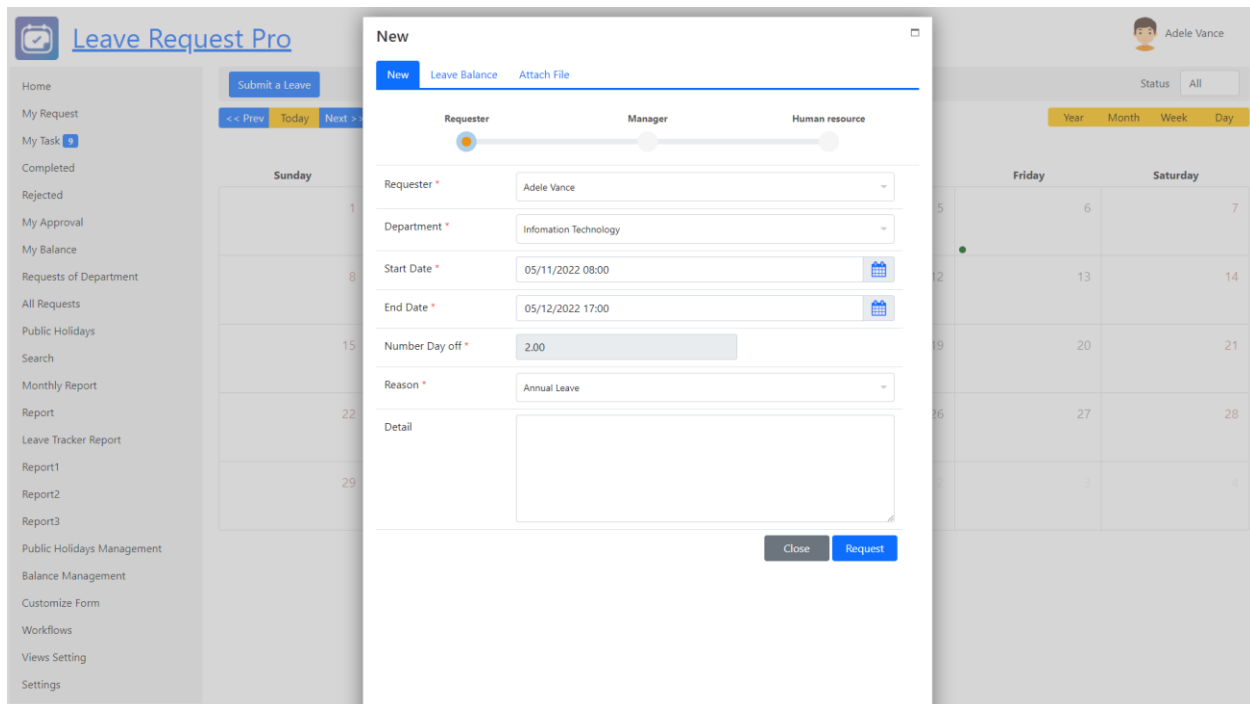
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# Leave Request Pro for SharePoint

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

## Overview

It is a system that supports end-users to request time off in your organization & allows the admin defines the system without code. It allows for creating a custom form and designing the workflow and you can change anything in the system for consistent with your organization. End users easy to create & manage the request. It provides all information to help the manager makes the approval. It is also a SharePoint hosted add-in all data of the add-in saves on your SharePoint site.



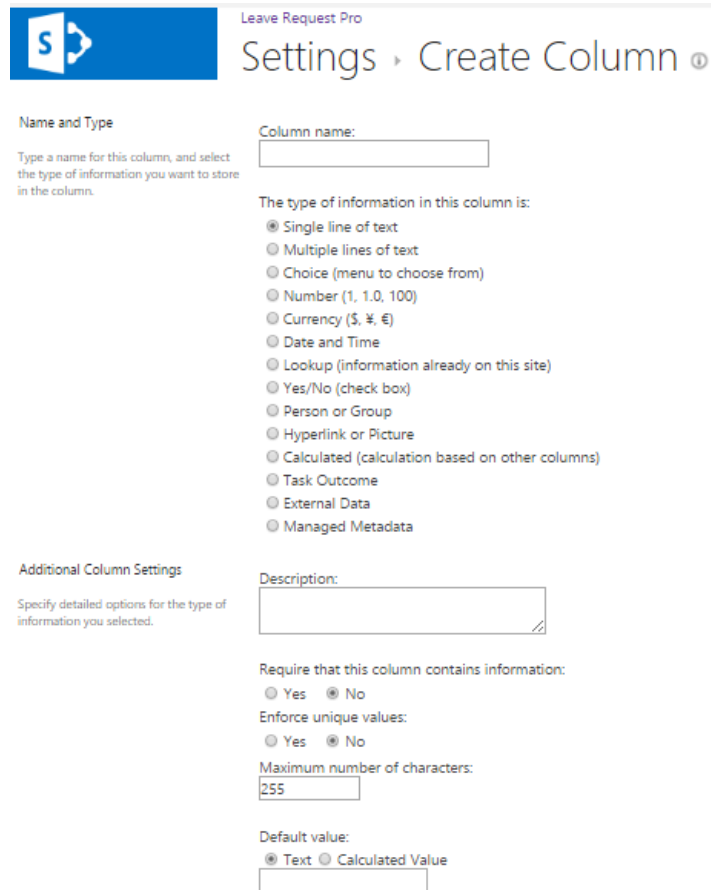
## Set up the form request

1. Open the app, click the **Customize Form** page link in the left menu
2. Click the New button to create a new field



3. On the page appears,

- Column name field
- Type of field
- The field is a required field or not
- ....



Leave Request Pro

## Settings > Create Column

**Name and Type**

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- Task Outcome
- External Data
- Managed Metadata

**Additional Column Settings**

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:  
 Yes  No

Enforce unique values:  
 Yes  No

Maximum number of characters:








Default value:  
 Text  Calculated Value

4. Click the **OK** button

5. Click the **edit** icon to edit the field. E.g. add more departments in the department field

New Update Change

Please click "Update Changes" button if any changes (don't delete fields 'Start date', 'End date', 'Department' and 'Number Days Of')













Order	Edit	Display Name	Static Name	Type
0		Department	LT_Department	Choice
1		Start Date	LT_StartDate	DateTime
2		End Date	LT_EndDate	DateTime
3		Number Day off	LT_NumberDayOff	Number
4		Reason	LT_Reason	Choice
5		Detail	LT_Detail	Note
6		Employee ID	Employee_x0020_ID	Text

- Use the **Order** column to reorder fields in the request form
- Click the **Save Change** button after completing the change

## Set up the workflow

- Open the app, click the **Workflow** link in the left menu

New Status Active

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

- Click the New button to add more steps to the workflow
- Click the edit icon to edit a step
- In the popup appears, input all fields
  - Title: Name of the step
  - Select user:
    - If **No**: The Assign To field will display to allow set the person who will be the approver of this step
    - If **Yes**: The **approver dropdown** will display in the form when submitting or approving the request. The list of users displayed in the **approver dropdown** that gets from the SharePoint group in the **Choose User from** the dropdown
  - Next step: The step after this step

- Can edit: if Yes, this step allows editing all fields (Start date, End date, Reason,... fields)
- Active: if Yes, the step is used in the workflow
- Order

### Workflow

Title

Select User ?  Yes  No

Choose user from

If you select the SharePoint Group, Please make sure that "Who can view the membership of the group?" in Group Settings is everyone

Next Step

Can Edit ?  Yes  No

Active  Yes  No

Order

5. Click the Save button after changes

## Edit the email template

1. Open the app, click the Workflow link in the left menu
2. Click the hand icon of the **Email Template** column. Up hand icon is the approved email template, and down hand icon is the reject email template

New								Status
								Active
Edit	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
	Requester		No	Manager	1	Yes		
	Manager	LTAPPS Support	No	Human resource	2	Yes		
	Human resource	LTAPPS Support	No	Finished	3	Yes		

3. In the popup appears, input all fields

- CC step: CC the user in the step when approving/rejecting the request

- CC User: CC the user when approving/rejecting the request
- CC Current User
  - If Yes, CC the current user when approving/rejecting the request
  - If No, don't CC the current user when approving/rejecting the request
- Subject: Subject the email, can use the lookup field
- Body: Body the email, can use the lookup field

**Workflow**

CC Step

CC User

CC Current User  
 Yes  No

Subject

Body

Font ▾ Formatting ▾ Font size ▾ **B** *I* U A

**You've received a new Leave Request.  
Approve it by accessing the link below.  
Please click [%Here%]**

**Information**

Department	[%LT_Department%]
Start Date	[%LT_StartDate%]
End Date	[%LT_EndDate%]
Number Day off	[%LT_NumberDayOff%]

4. Click the **Save** button after changes

## Set up pages

1. Open the app, click the **Views Setting** link in the left menu
2. Click the Edit icon of the page that you want to edit
3. There are 4 types of the page
  - **My Task & My Approval pages:** With this type, it allows display fields that have the number/text/date type
  - **My Request, Completed, Rejected & All Requests pages:** With this type, it allows display of all types of fields & allows configure the Sort By, number of rows display
  - **Search page:** With this type, it includes all abilities of the previous type and allows configuring the filter section
  - **Report page:** With this type, includes all abilities of the previous type and allows adding texts to the header of the report

**View My Requests**

Sort By: Created Desc Limit Rows: 200

Please click "Update" button if any changes

Close Save Changes

	Order	Display Name	Type	Width(%)
<input checked="" type="checkbox"/>	0	ID	Counter	
<input checked="" type="checkbox"/>	1	Department	Choice	20
<input checked="" type="checkbox"/>	2	Form Type	Lookup	
<input type="checkbox"/>	3	Competencies	MultiChoice	
<input type="checkbox"/>	4	Compliance Asset Id	Text	
<input type="checkbox"/>	5	Cost Center	Text	

4. After completing all changes, click the **Save Changes** button

## Set up the manager of the user or the department

### Set up the manager of the user

1. Click the **Settings** link in the left menu
2. In the **Configurations** zone, click the **User info** link



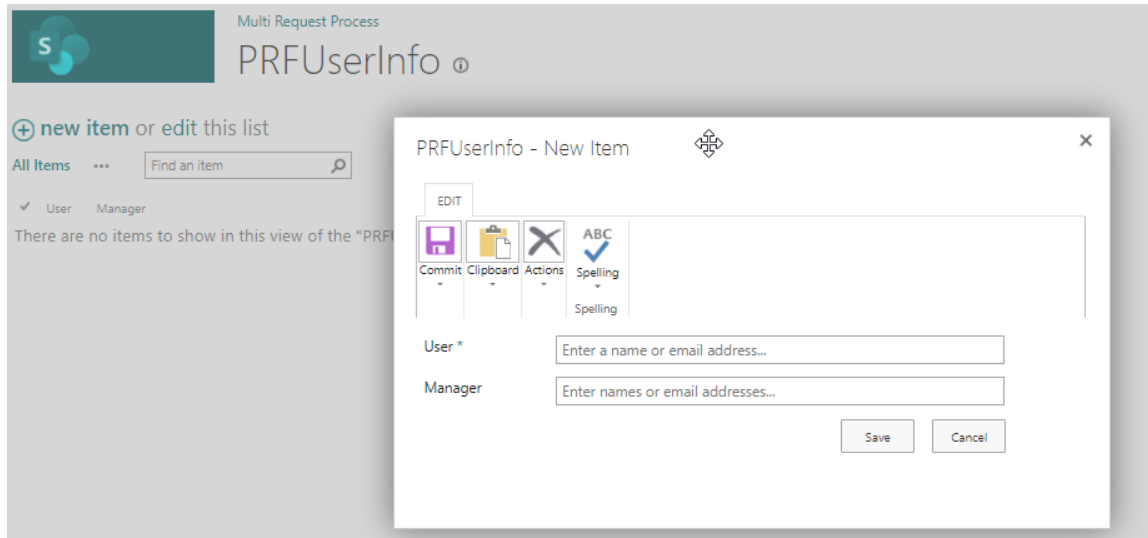
## Configurations

[General Configuration](#)

[Users Info](#)

[Manager of Department](#)

3. In the page appears, click the New item button
4. Input the user & manager fields



5. Click the **Save** button

### Set up the manager of the department

1. Click the **Settings** link in the left menu
2. In the **Configurations** zone, click the **Manager of Department** link
3. Select managers for each department then click the Update button

Department	Managers	
Information Technology	<input type="button" value="x CEO"/> <input type="button" value="x Finance 1"/> <input type="button" value="x Finance 2"/> <input type="text"/>	<input type="button" value="Update"/>
Human Resource	<input type="text" value="Choose option"/>	<input type="button" value="Update"/>
Accounting	<input type="text" value="Choose option"/>	<input type="button" value="Update"/>

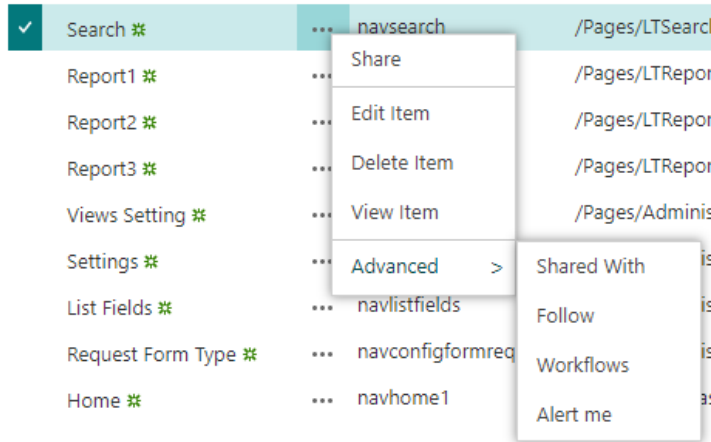
### Set up the permission

The permission of the add-in that based on the permission of items in the menu list. It means if the user doesn't have any permission to the report item in the menu list, he/she cannot see the report page.

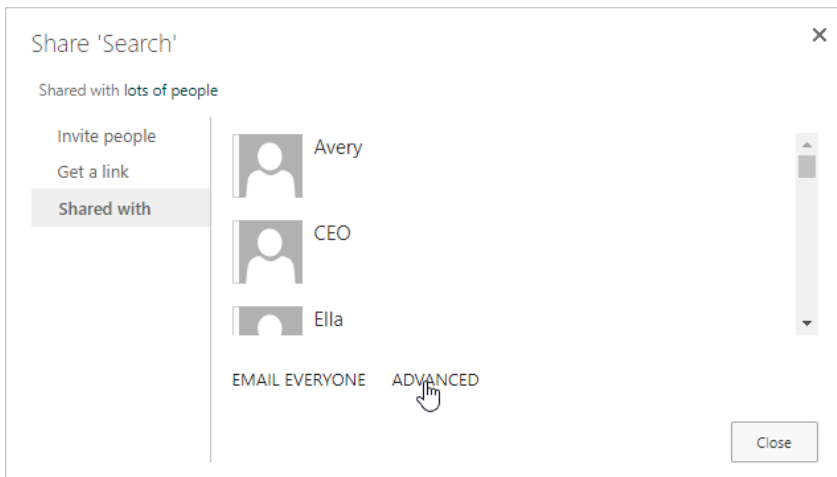
Follow the steps below to set it up

1. Click the **Settings** link in the left menu

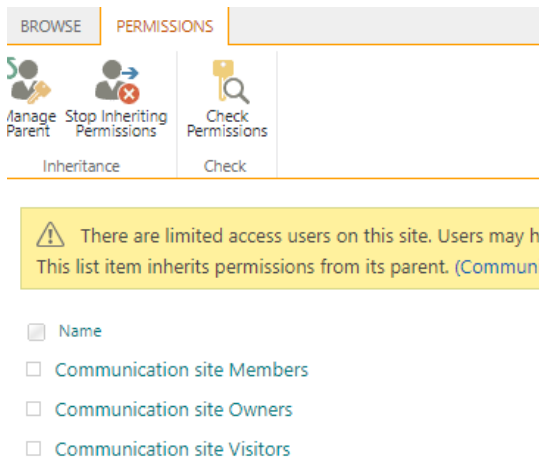
2. In the **Permission** zone, click the **Menu** link
3. In the menu list, select the **Search** item -> to click **Advanced** -> **Shared With** in the context menu



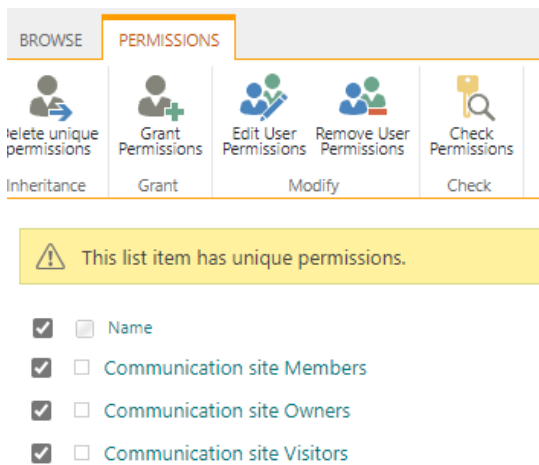
4. Click the **Advanced** button



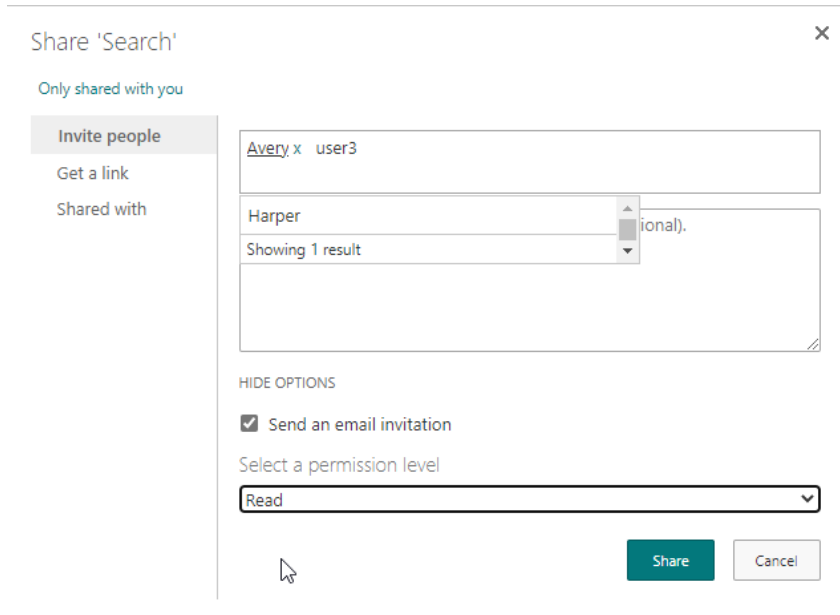
5. Click the Stop Inheriting Permissions icon on the ribbon



6. Select all SharePoint groups / Users then click the **Remove User Permission** icon



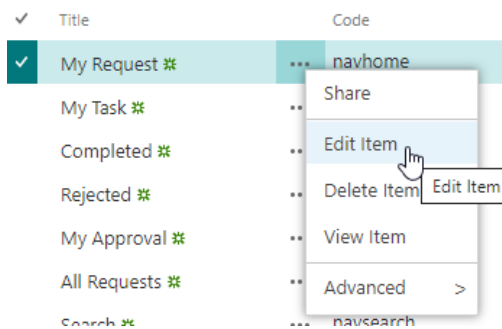
7. After that add the user who can see the **Search** page by clicking the **Grant Permissions** Icon then add the user with the Read permission



8. Click the **Share** button
9. Repeat all steps above to Pages (Report, settings page) that you want to change the permission

## Customize the left menu

1. Click the **Settings** link in the left menu
2. In the **Permission** zone, click the **Menu** link
3. Select the item, click the **Edit item** link



4. Edit the info



Title \*

Code \*

URL Page \*

Order By

Created at 3/10/2021 11:22 PM by  System Account  
Last modified at 3/10/2021 11:22 PM by  System Account

5. Click the **Save** button

## Setting up approval managers per department or user

There are 3 ways to set a manager for the user

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

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

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

Get Manager *Auto choose the manager of user when create a new request.*

That way has 2 options

1. Choosing the manager when creating a new form

Assign To \*

2. Choosing the manager in the step of the workflow. With this option, the user doesn't need to choose the manager in the new form. The manager who set in the step will manage the user

Workflow □

Title

---

Select User i  
 Yes  No

---

Assign To

### Setting manager for the department

The configuration has 2 steps

1. Going to the Manager of Department page (Settings->Manager of Department). Then add managers for each department's list

Department	Managers	
Information Technology	<input type="button" value="x Demo"/> <input type="text"/>	<input type="button" value="Update"/>
Human Resource	<input type="button" value="x LTAPPS Support"/> <input type="text"/>	<input type="button" value="Update"/>
Accounting	<input type="button" value="x Demo"/> <input type="text"/>	<input type="button" value="Update"/>

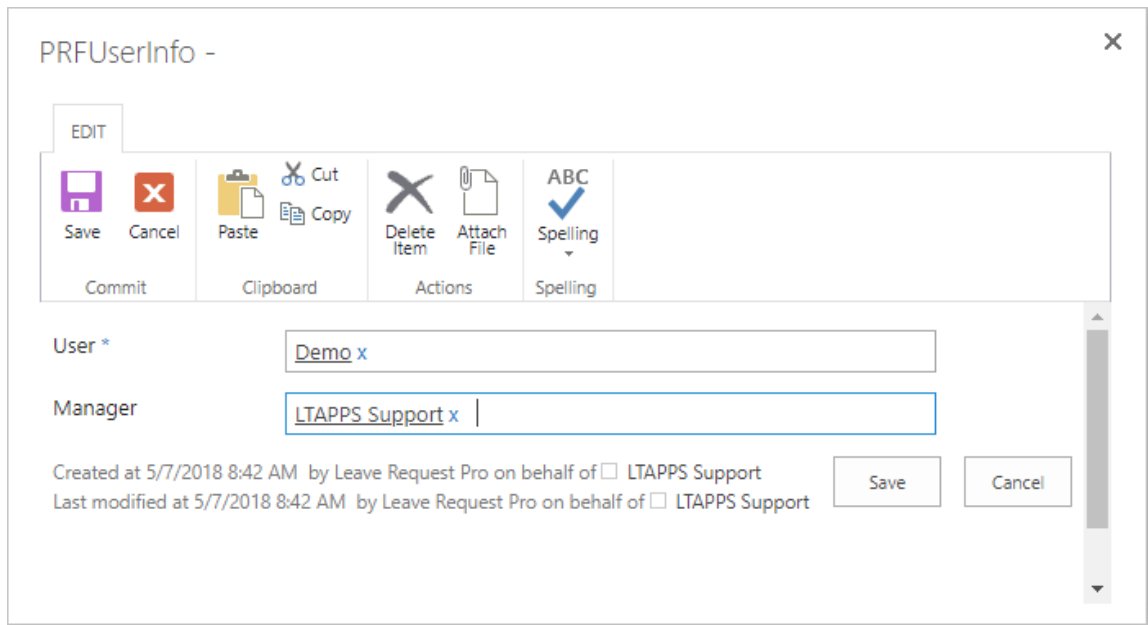
2. Going to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Manager of Department List"

Get Manager Auto choose the manager of user when create a new request.	<input type="text" value="From Manager of Department list"/>
--	--

### Setting manager for the user

The configuration has 2 steps

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



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

Get Manager Auto choose the manager of user when create a new request.

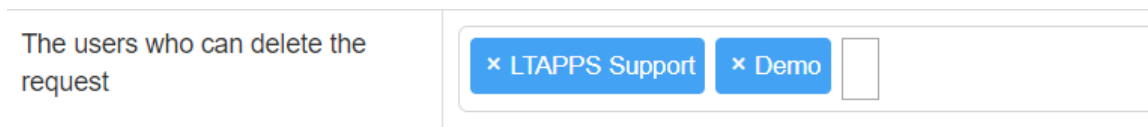
From User Info List

## Allows the user who can delete the request

The configuration configures the rule which allows the user can delete the request after it is finished or not

That step has 2 child steps

1. Going to the General Configuration page (Settings -> General Configuration) ->Then add the user to the "The users who can delete the request" dropdown



2. Going to the Search page, then find the request which needs to delete -> click the Delete icon

View	Requestor	Department	Start Date	End Date	Number Day off	Reason	Stage	Status	Delete
	LTAPPS Support	Information Technology	05/07/2018 22:26	05/07/2018 22:26	1	Annual Leave	Human resource	Finished	
	LTAPPS Support	Information Technology	05/07/2018 22:30	05/07/2018 22:30	2	Sick Leave	Human resource	Finished	
	Demo	Information Technology	05/07/2018 22:38	05/07/2018 22:38	2	Annual Leave	Human resource	Finished	

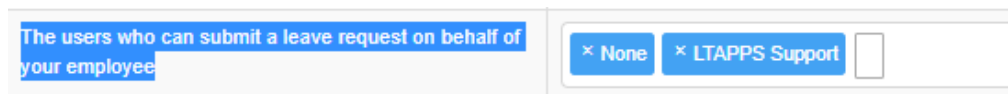
Showing 1 to 3 of 3 entries

First Previous **1** Next Last

## The users who can submit a leave request on behalf of the employee

The configuration configures the rule which allows the users who can submit a leave request on behalf of the employee

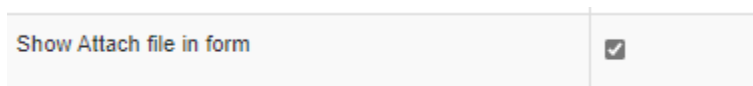
Going to the General Configuration page (Settings -> General Configuration) ->Then add the user to the **“The users who can submit a leave request on behalf of the employee”** dropdown



## Attachment file in form (Medical document ...)

The configuration allows attaching the medical document ... to form

Going to the General Configuration page (Settings -> General Configuration) -> Check the **“Show Attach file in form”** checkbox



## Automatic calculation of the number of days

The configuration allows automatic calculation of the number of days

Go to the General Configuration page (Settings -> General Configuration) and configures as the example image below. If allow editing the number of days in form, check the **“edit the number of days in the form”** checkbox





Automatic calculation on the number of days	
<input checked="" type="checkbox"/> Allows automatic calculation on the number of days	
Working hours	From 08:00 To 17:00
Break time	From 12:00 To 13:00
Weekend	Saturday & Sunday
<input type="checkbox"/> Allows edit the number of days	

## Fiscal Year

There are 2 options

- From January 1st to December 31st
- From April 1st to March 31<sup>st</sup>

Going to the General Configuration page (Settings -> General Configuration), the Fiscal Year dropdown

Fiscal Year	April 1st - March 31st
-------------	------------------------

## Date Format

Going to the General Configuration page (Settings -> General Configuration, Date Format dropdown

Date Format	DD/MMM/YYYY
-------------	-------------

## Restrict users display in the requester field

Going to the General Configuration page (Settings -> General Configuration, All Users dropdown

All Users (Display in view all requests, search, reports..) <small>If you select the SharePoint Group, Please make sure that "Who can view the membership of the group?" in Group Settings is everyone</small>	Team Site Owners
---	------------------

## Integrations

This feature allows the sync of the request to the SharePoint list in the parent site where the app is installed. After the request completed the process, the app syncs the request to the SharePoint list.

To set it up, follow the steps below

- Going to the Integration page (Setting -> Integrations)
- In the Integration page, input the info & click the Create Parent List button
  - o List Name:
  - o Is Hidden List:
    - Yes: The list hides in the parent site
    - No: The list shows on the parent site

To disable/enable this feature, select the **active** is yes/no & click the Update button

To update fields from Leave Request app to the parent list, click the **Sync Fields of the parent list** button

List Name

Is Hidden List  Yes  No

Active  Yes  No

Click the Create Parent List button to create a SharePoint custom list in the parent site. After the request finished, the app sync the request to the list. You are able to use the Power Automate or other tools to sync the data to other systems.

Click the Update button to update the title / hidden of the parent list and make the intergration feature is active or inactive

Click the Sync Fields to the Parent List button if you make any changes fields in the Customize Form page

**Note:**

- if the type field (Leave Request) is 'Choice', 'Lookup' => the fype field (Parent list) is 'Single line of text'
- If you change the type field and click the Sync Fields button, may result in a loss of data.
- Don't change the name of view 'All items' of the parent list

Leave Request - Field Name	Leave Request - Field Type	Parent List - Field Name	Parent List - Field Type
Checkbox	Yes/No	Checkbox	Yes/No
Currency	Currency	Currency	Currency
Department 1	Choice	Department 1	Single line of text
Detail	Multiple lines of text	Detail	Multiple lines of text
DrowdownMulti	Choice	DrowdownMulti	Single line of text
End Date	Date and Time	End Date	Date and Time

## Default view & field display in Calendar View

Going to the General Configuration page (Settings -> General Configuration)

Calendar View Mode (Home View)	<input type="text" value="Month"/>
Title of item in calendar (All Requests View)	<input type="text" value="Reason"/>
Calendar View Mode (All Requests View)	<input type="text" value="Month"/>

## Translation

There are 3 locations

1. Left Menu
2. Fields in the form
3. Others (Calendar, Status, Step... fields)

### Left Menu

1. Open the app, click the **Setting** link in the left menu
2. Click the **Menu** link under the Permission section
3. Edit each item in the menu list & changes the **title** of the items

### The field in the form

1. Open the app, click the **Customize Form** link in the left menu
2. Click the **edit icon** of the field
3. Changes the **title** of the field

### Other (Calendar, Status, Step... fields)

1. Open the app, click the **Setting** link in the left menu
2. Click the **Translation** link under the Configurations section
3. On the page appears, changes the text in the Translate column

[Update Change](#)

Key	English	Translate
SubmitRequest	Submit a Leave	<input type="text" value="Submit a Leave"/>
FormTitleNew	New	<input type="text" value="New"/>
FormTitleView	View	<input type="text" value="View"/>
FormTitleToDo	Todo	<input type="text" value="Todo"/>
FormTitleEdit	Edit	<input type="text" value="Edit"/>
FormTabView	View	<input type="text" value="View"/>
FormTabNew	New	<input type="text" value="New"/>
FormTabEdit	Edit	<input type="text" value="Edit"/>
FormTabLeaveBalance	Leave Balance	<input type="text" value="Leave Balance"/>
FormTabInformationProcessing	Information Processing	<input type="text" value="Information Processing"/>
FormTabLeaveAttachFiles	Attach File	<input type="text" value="Attach File"/>
Requester	Requester	<input type="text" value="Requester"/>
Approver	Approver	<input type="text" value="Approver"/>
Step	Step	<input type="text" value="Step"/>
Status	Status	<input type="text" value="Status"/>
DateModified	Date Modified	<input type="text" value="DateModified"/>

4. Click the **Save Change** button after changes