

LEAVE REQUEST PRO for SharePoint

Configuration guide

Version 3.0

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Leave Request Pro for SharePoint

Request, track, approval and manage the requested. Easy to use, configuration and very flexible

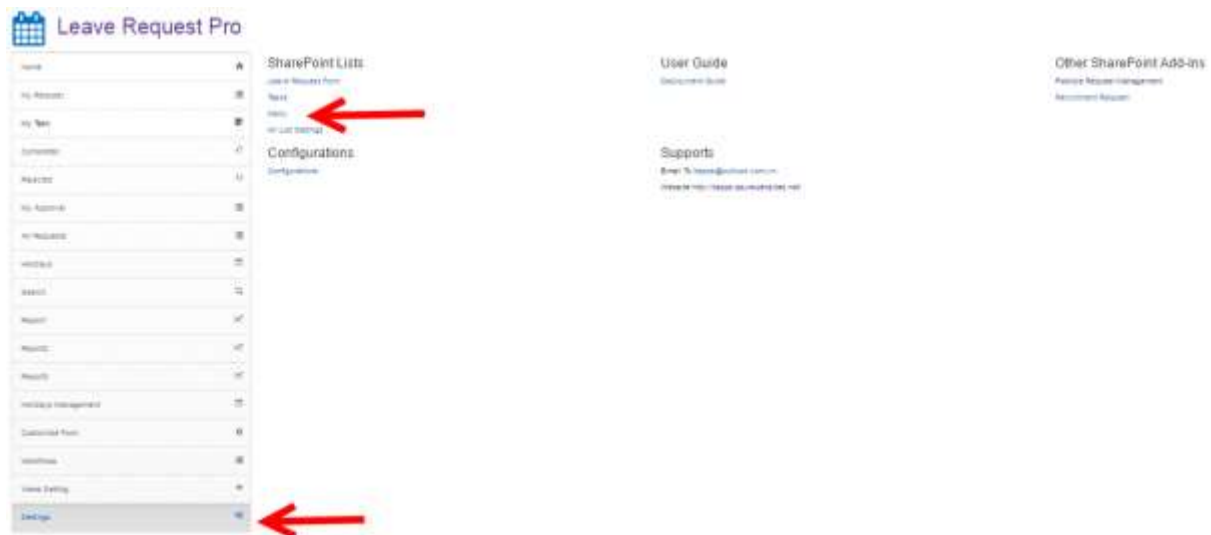
Overview

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 create a custom form, design 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.

Customize left menu

This step allows administrator to customize the left menu for consistent an organization. The administrator can reorder items in left menu and share permission for each item of left menu.

In **settings** page, Click “Menu” under **SharePoint Lists** Tab



In **PRF Menu** List page, you can edit/delete any item if you want



+ [new item](#) or [edit this list](#)
 All Items ... 🔍

✓ Title	Code	URL Page	Order By
Home ⚙	navhome	/Pages/LTMyRequests.aspx?navpara=navhome	1
✓ My Task ⚙	navmytask	/Pages/LTMyTasks.aspx?navpara=navmytask	2
Completed ⚙	Share	/Pages/LTCompleted.aspx?navpara=navcompleted	3
Rejected ⚙	Edit Item	/Pages/LTRejected.aspx?navpara=navrejected	4
My Approval ⚙	Delete Item	/Pages/LTMyApprovals.aspx?navpara=navmyapproval	5
All Requests ⚙	View Item	/Pages/LTAllRequests.aspx?navpara=navallrequest	6
Customize Form ⚙	Advanced	/Pages/Administrator/ConfigForm/ConfigFormEdit.aspx?navpara=navallconfigforms	7
Workflows ⚙	navworkflows	/Pages/Administrator/Workflow/AllWorkflows.aspx?navpara=navworkflows	8
Views Setting ⚙	navviewssetting	/Pages/Administrator/ViewsSetting/AllViewsSetting.aspx?navpara=navviewssetting	9
Settings ⚙	navsettings	/Pages/Administrator/Settings/Settings.aspx?navpara=navsettings	10

Permission

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

In **PRF Menu** List page, Click **Share** in context menu

Recruitment Request

PRF Menu

+ new item or edit this list

All Items Find an item

Title	Code	URL Page	Order By
Home	navhome	/Pages/LTMyRequests.aspx?navpara=navhome	1
My Task	navmytask	/Pages/LTMyTasks.aspx?navpara=navmytask	2
Completed	navcompleted	/Pages/LTCompleted.aspx?navpara=navcompleted	3
Rejected	navrejected	/Pages/LTRejected.aspx?navpara=navrejected	4
My Approval	navmyapproval	/Pages/LTMyApprovals.aspx?navpara=navmyapproval	5
All Requests	navallrequest	/Pages/LTAllRequests.aspx?navpara=navallrequest	6
Customize Form	navallconfioforms	/Pages/Administrator/ConfigForm/ConfigFormEdit.aspx?navpara=navallconfigforms	7
Workflows		/Pages/Administrator/Workflow/AllWorkflows.aspx?navpara=navworkflows	8
Views Setting		/Pages/Administrator/ViewsSetting/AllViewsSetting.aspx?navpara=navviewssetting	9
Settings		/Pages/Administrator/Settings/Settings.aspx?navpara=navsettings	10

Context menu for 'Customize Form':

- Share
- Edit Item
- Delete Item
- View Item
- Advanced

In popup appear. Select User, choose a permission, then click **Share**

Share 'Customize Form'

Only shared with you

Invite people

Get a link

Shared with

administrator Can edit

administrator (additional).

Showing 1 result

SHOW OPTIONS

Share Cancel

If you want to remove all permissions in the item, select **Shared with**, then click **Stop Sharing**.



Customize the form

Allows administrator to customize the form for consistent the organization. The administrator can add, edit or delete any field that he wants. This tool supports many types of [SharePoint Field](#)

Type of field supports:

- Single line of text
- Multiple lines of text (Not supports Rich Text)
- Choice
- Number
- Currency
- Date and Time
- Lookup (Not supports addition field)
- Yes/No
- Person or Group (Not supports Group)
- Hyperlink or Picture
- Calculated

All Fields of Form

This view that administrator can add, edit, delete and reorder the field. When any field changes, please click "Update changes" button

+ New 1				
Update Change 2		Update button if any changes (don't delete 2 fields 'Start date' and 'End date')		
Order	Edit	Display Name	Static Name	Type
0 4		Department	LT_Department	Choice
1	 3	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

- (1): New a Field
- (2): Update Changes
- (3): Edit a Field
- (4): Reorder

New Field Form

This form is the new field form of SharePoint. The administrator can select type that he wants.



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

Edit or Delete Field Form

This form is the default form of SharePoint. The administrator can delete, update the field.



Leave Request Pro

Settings » Edit Column

Name and Type

Type a name for this 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

Additional Column Settings

Specify detailed options for this type of information you selected.

Description:

Enforce unique values:

- Yes
- No

Type each choice on a separate line:

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:

- Yes
- No

Default value:

- Choice
- Calculated Value

Column Validation

Pages & Reports Setting

Allows administrator to set up the page (Display field, filter, Sort by).

3 types of view setting form

- View setting form for "My Task" and "My Approval"
- Reports
- And for else

Edit	View Name
	View Calendar
	My Requests
	My Tasks
	Completed
	Rejected
	My Approvals
	All Requests
	Search
	Report 1
	Report 2
	Report 3

View Setting form for “My task” and “My approval”

This form supports some types of field: Text, Number, Date Time

View My Tasks □

Please click "Update" button if any changes

Save Change
Close

	Order	Display Name	Type	Width(%)
<input checked="" type="checkbox"/>	0 ▼	Start Date	DateTime	<input style="width: 80%;" type="text"/>
<input checked="" type="checkbox"/>	1 ▼	End Date	DateTime	<input style="width: 80%;" type="text"/>
<input checked="" type="checkbox"/>	2 ▼	Number Day off	Number	<input style="width: 80%;" type="text"/>
<input type="checkbox"/>	3 ▼	Created	DateTime	<input style="width: 80%;" type="text"/>
<input type="checkbox"/>	4 ▼	Modified	DateTime	<input style="width: 80%;" type="text"/>

Please click "Update" button if any changes

Save Change
Close

Reports

Report 1

Header

Line 1

Line 2

Filter

Field Name	Operator	Value	
<input type="text" value="Requester"/>	<input type="text" value="None"/>		<input type="button" value="✖"/>
<input type="text" value="Department"/>	<input type="text" value="None"/>		<input type="button" value="✖"/>
<input type="text" value="Status"/>	<input type="text" value="None"/>		<input type="button" value="✖"/>

Sort by

Limit Rows:

Please click "Update" button if any changes

	Order	Display Name	Type	Width(%)
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	Requester	User	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Department	Choice	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Start Date	DateTime	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	End Date	DateTime	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	Number Day off	Number	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	Reason	Choice	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="6"/>	Stage	Number	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="7"/>	Status	Number	<input type="text"/>

And Else

This form supports all types of field.

View All Requests □

Sort by

Limit Rows:

Please click "Update" button if any changes

Save
Close

	Order	Display Name	Type	Width(%)
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	Requestor	User	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	Department	Choice	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	Start Date	DateTime	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	End Date	DateTime	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	Number Day off	Number	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	Reason	Choice	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text" value="6"/>	Stage	Number	<input type="text"/>

Note: Limit Rows is 0 that means 5000 items

Workflow

Allows administrator to update the workflow for consistent the organization.

1. In left menu, click **Workflows**

+ New
Status:

	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
	Requestor		No	Manager	1	Yes		
	Manager		Yes	Human resource	2	Yes		
	Human resource	requestor	No	Finished	3	Yes		

2. If want to new step, click **New**

Workflow

Title **1**

Select User ⁱ Yes No **2**

Assign To **3**

Next Step **4**

Can edit ⁱ Yes No **5**

Active Yes No **6**

Order **7**

8

- (1): Name of step
- (2): Select User. The "Assign To" field will display in the "Request" form if you choose 'Yes'
- (3): Assign To: if select user is No
- (4): Next Step: if this step is last step, this step is Finished
- (5): Can Edit: User can edit data in the "Request" form if you choose 'Yes'

- (6): Active
- (7): Order By
- (8): Save

3. If want to change step. Please click **Edit** Icon
4. If want to delete step. Please click **Delete** Icon.

Note

- Can't delete a step "Requestor" because this step is first step.
- Can't delete a step if this step is used

Email templates

Allows administrator to update the email template for consistent the organization.

1. In left menu, click **Workflows**. Click **hand icon** to update an email template. **Hand up** is approval, **hand down** is reject

+ New								Status: Active
Edit	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
	Requestor		No	Manager	1	Yes	 	
	Manager		Yes	Human resource	2	Yes	 	
	Human resource	requestor	No	Finished	3	Yes	 	

2. Edit an email template

CC Step

* Requestor **1**

CC User

Choose option **2**

Subject

Leave Request - [%LT_Requestor%] - Approval **3** **4** Lookup

Body

Font - Formatting - Font size - B I U A [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons] [List Icons]

⌵ - * [List Icons] [List Icons] [List Icons] [List Icons]

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

5 Information

Department	[%LT_Department%]
Start Date	[%LT_StartDate%]
End Date	[%LT_EndDate%]
Number Day off	[%LT_NumberDayOff%]
Reason	[%LT_Reason%]
Detail	[%LT_Detail%]

Lookup **6** **7** Save Close

- (1): CC Step: CC Email to "Assign To" of step
- (2): CC User: CC User
- (3): Subject Email
- (4): Lookup field for subject
- (5): Body
- (6): Lookup field for body
- (7): Save

3. Lookup field

Lookup Field

Field

Created

Select
Close

Setting up approval managers per department or user

There are 3 ways to set 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 go 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.*

From Workflow

That way has 2 options

1. Choosing the manager when creating a new form

Assign To *

x Demo

Request
Close

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

Workflow

Title

Manager

Select User i

Yes No

Assign To

x Demo

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 list

Department	Managers	
Information Technology	x Demo	Update
Human Resource	x LTAPPS Support	Update
Accounting	x Demo	Update

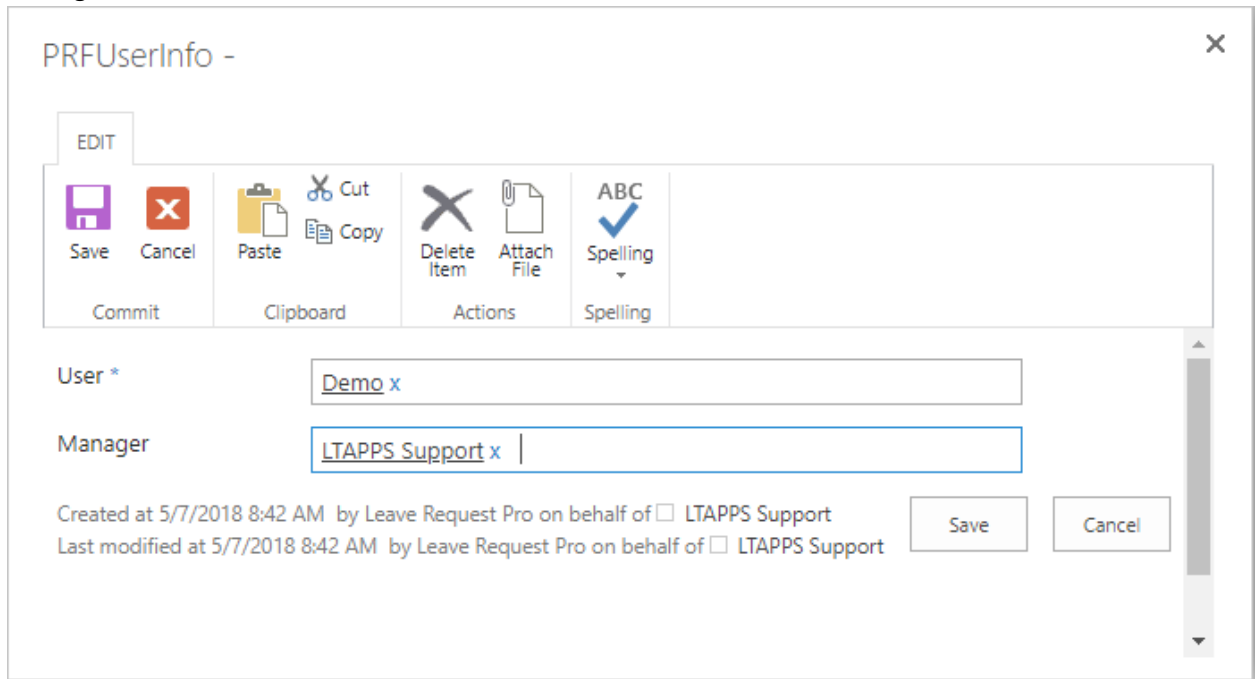
2. Going to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Manager of Department List"

<p>Get Manager Auto choose the manager of user when create a new request.</p>	<p>From Manager of Department list</p>
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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



The screenshot shows a window titled "PRFUserInfo -" with a close button in the top right. Below the title bar is a ribbon menu with tabs for "EDIT", "Clipboard", "Actions", and "Spelling". The "EDIT" tab is active, showing icons for Save, Cancel, Paste, Copy, Delete Item, Attach File, and Spelling. Below the ribbon are two text input fields: "User *" containing "Demo x" and "Manager" containing "LTAPPS Support x". At the bottom, there is a status bar with creation and modification timestamps, a checkbox for "LTAPPS Support", and "Save" and "Cancel" buttons.

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.

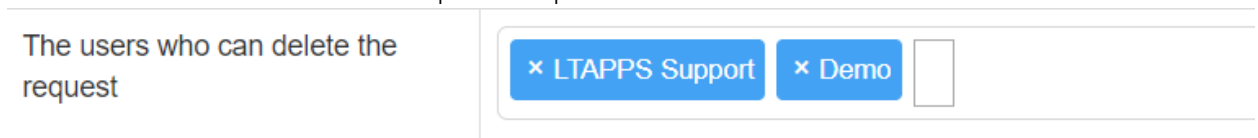
From User Info List

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 users who can delete the request" dropdown



The screenshot shows a configuration field labeled "The users who can delete the request". To the right of the label is a dropdown menu with two selected items: "x LTAPPS Support" and "x Demo", and an empty input box.

2. Going to the Search page, then find the request which needs to delete -> click 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 users who can submit a leave request on behalf of the employee” dropdown

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

Attachment file in form (Medical document ...)

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

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

Show Attach file in form

Automatic calculation on the number of days

The configuration allows automatic calculation on the number of days

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

Automatic calculation on the number of days

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			

Allows edit the number of days

Fiscal Year

There are 2 options

- From January 1st to December 31st
- From April 1st to March 31st

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

Fiscal Year	April 1st - March 31st
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Date Format

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

Date Format	DD/MMM/YYYY
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Restrict users display in 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
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Default view & field display in Calendar View

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

Calendar View Mode (Home View)	Month
Title of item in calendar (All Requests View)	Reason
Calendar View Mode (All Requests View)	Month

