# LEAVE REQUEST PRO for SharePoint

## Configuration guide

Version 3.0

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# Contents

# Leave Request Pro for SharePoint

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

## Overview

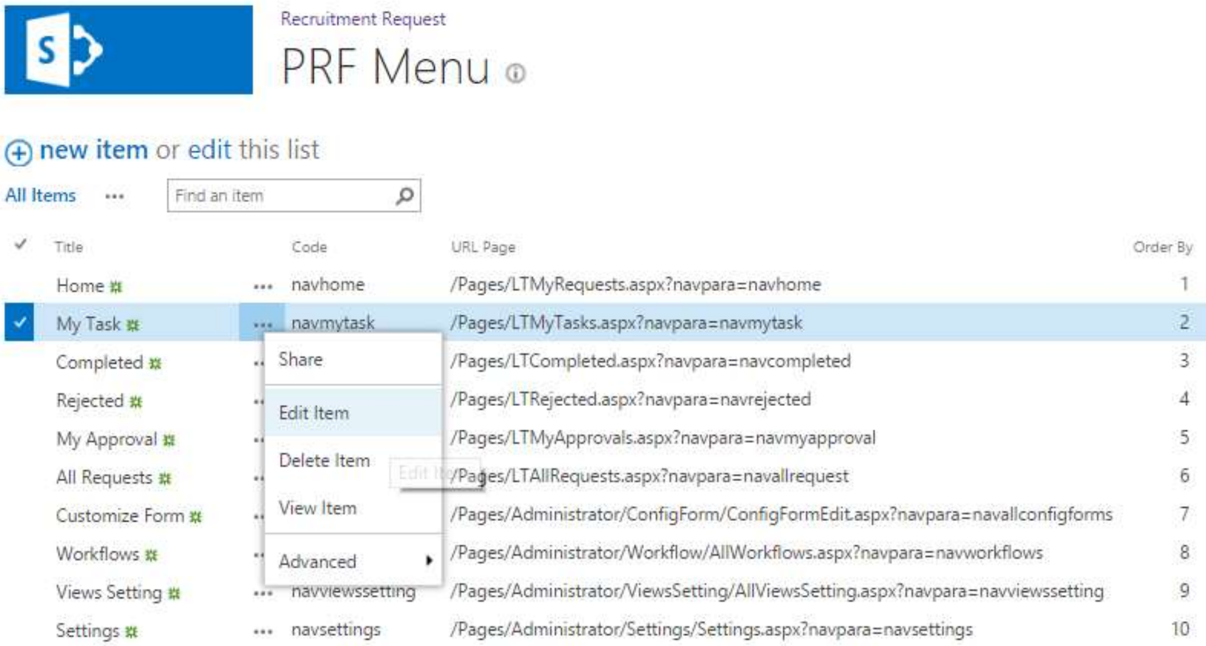
It is a system that supports end users to request time off in your organization & allows the admin defines the system without code. It allows create a custom form, design the workflow and you can change anything in the system for consistent with your organization. End users easy to create & manage the 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

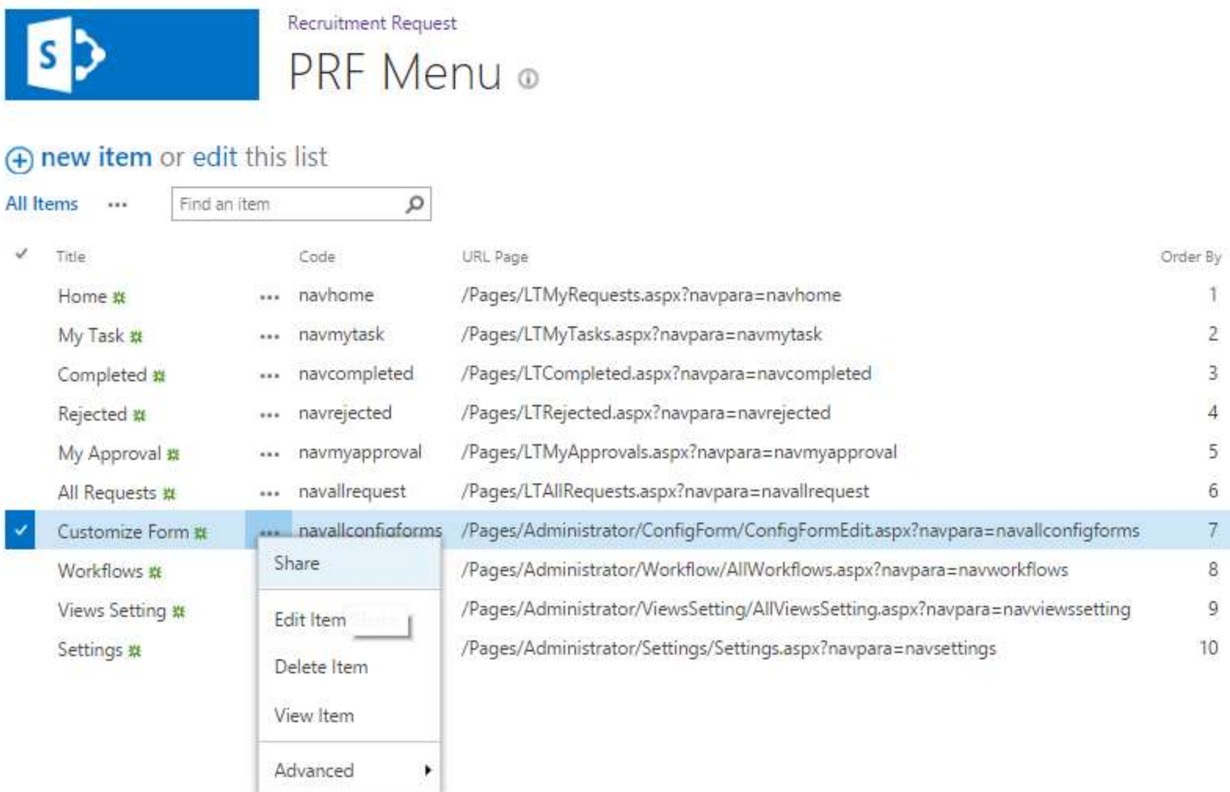

In **PRF Menu** List page, you can edit/delete any item if you want



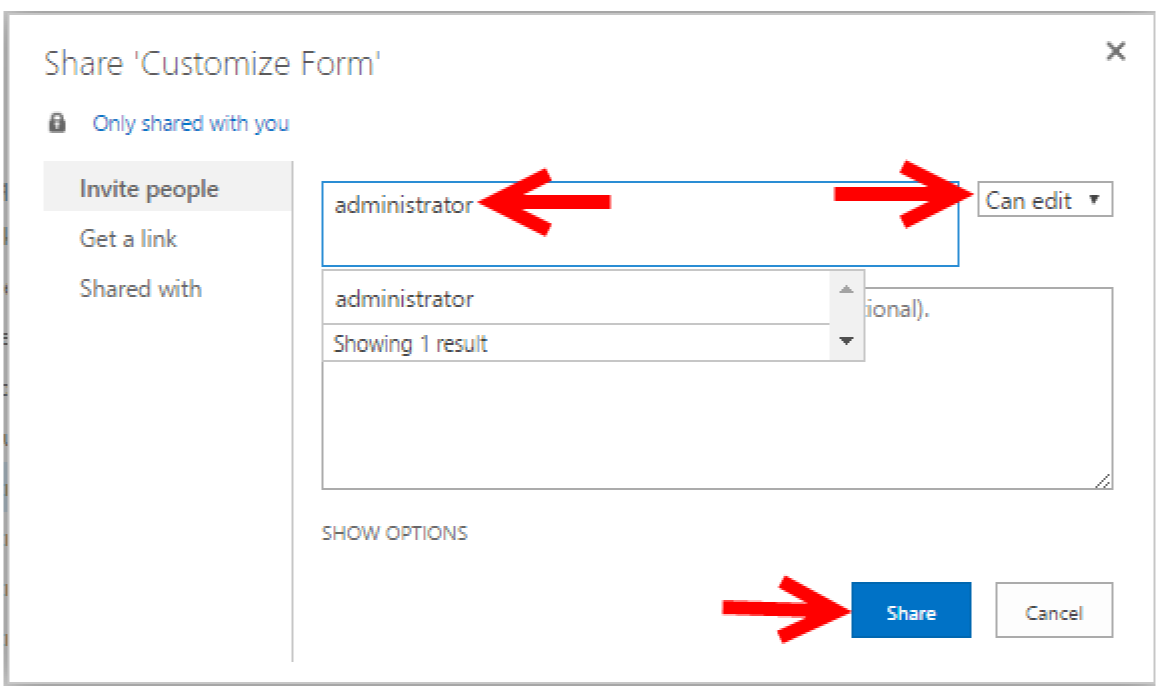

## Permission

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

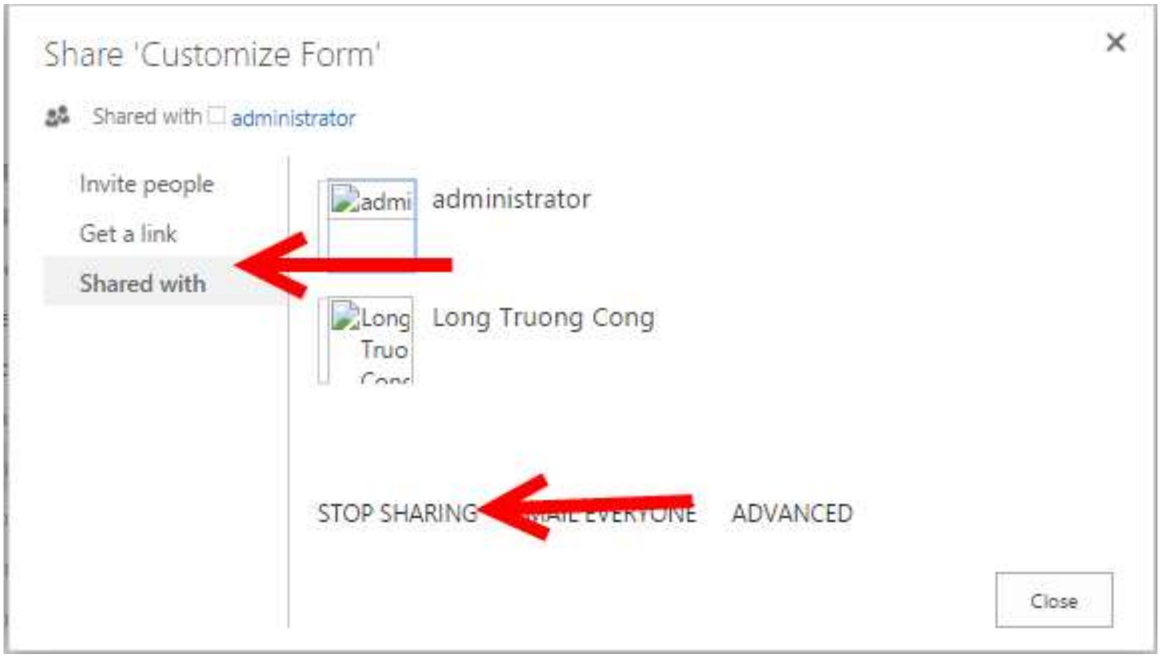
In **PRF Menu** List page, Click **Share** in context menu




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




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




## Customize the form

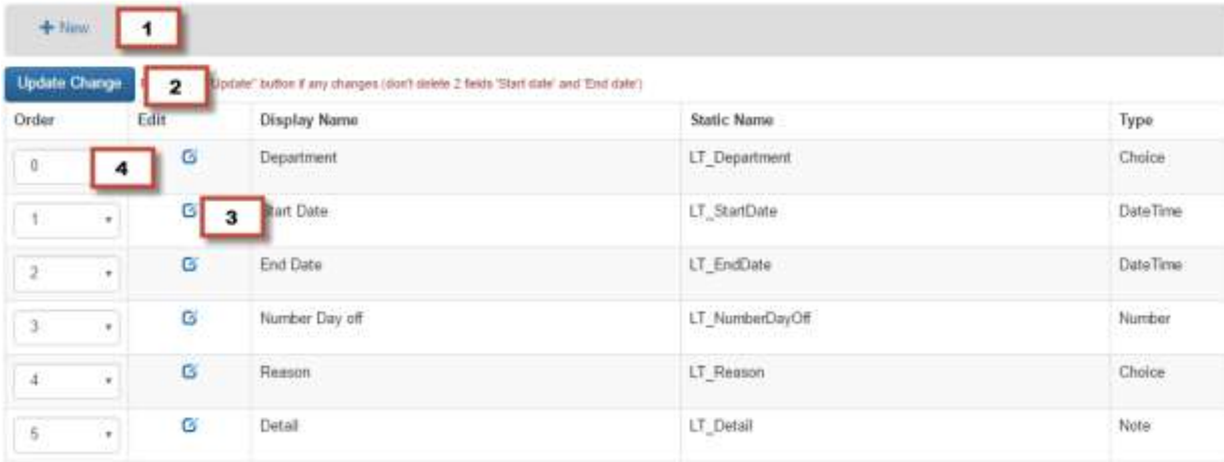
Allows administrator to customize the form for consistent the organization. The administrator can add, edit or delete any field that he wants. This tool supports many types of [SharePoint Field]

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

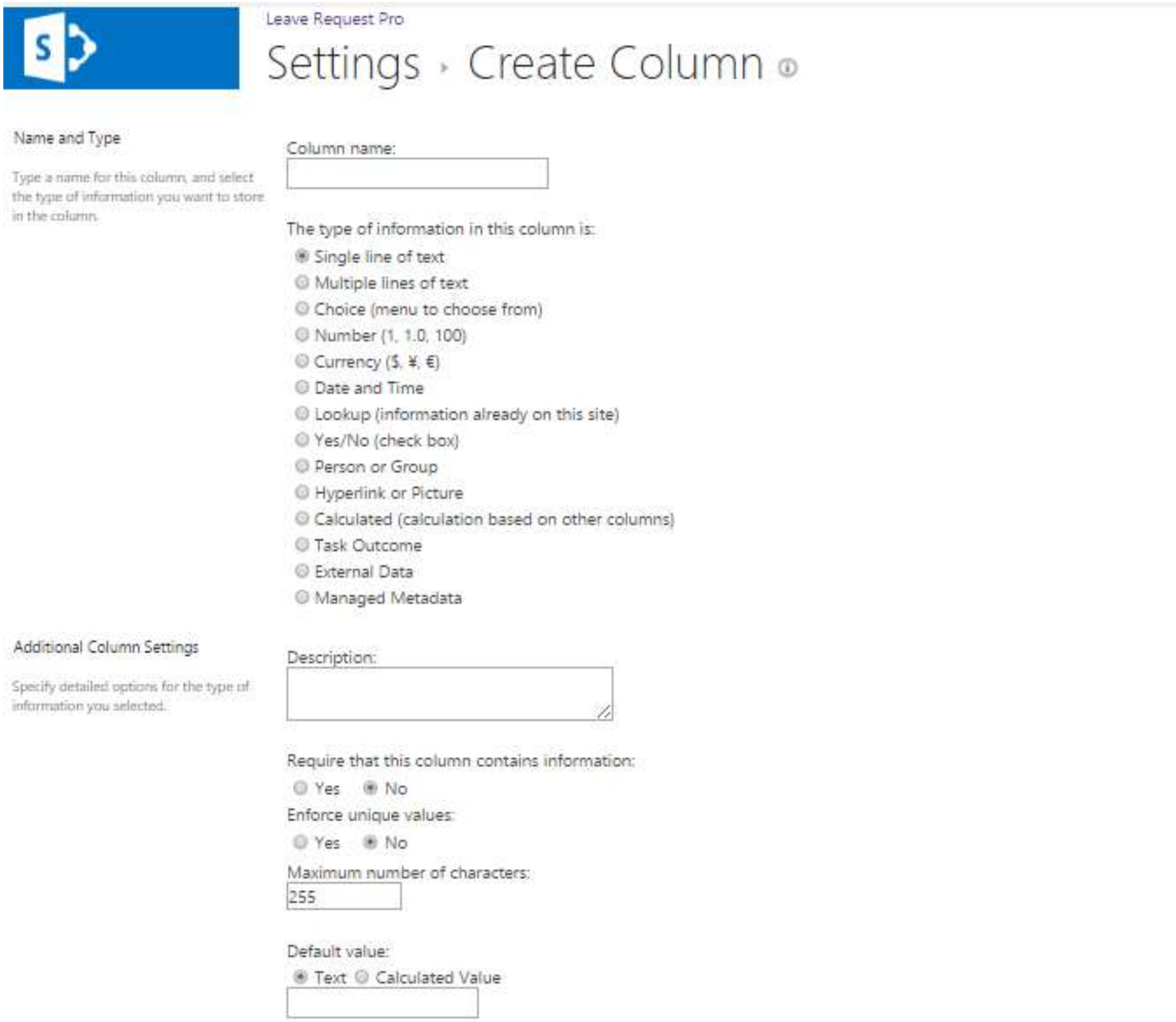
This view that administrator can add, edit, delete and reorder the field. When any field changes, please click “Update changes” button




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

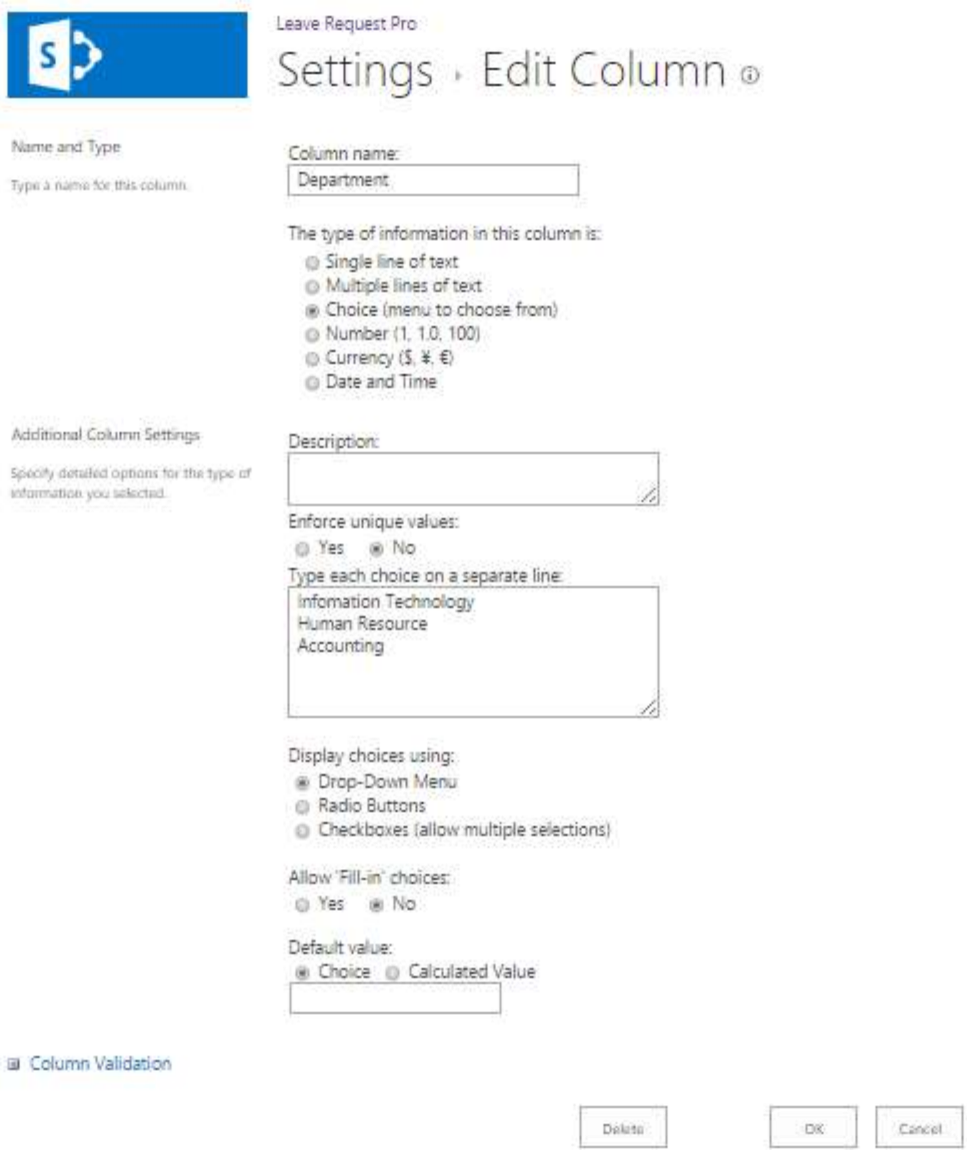
## New Field Form

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




## Edit or Delete Field Form

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




## 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

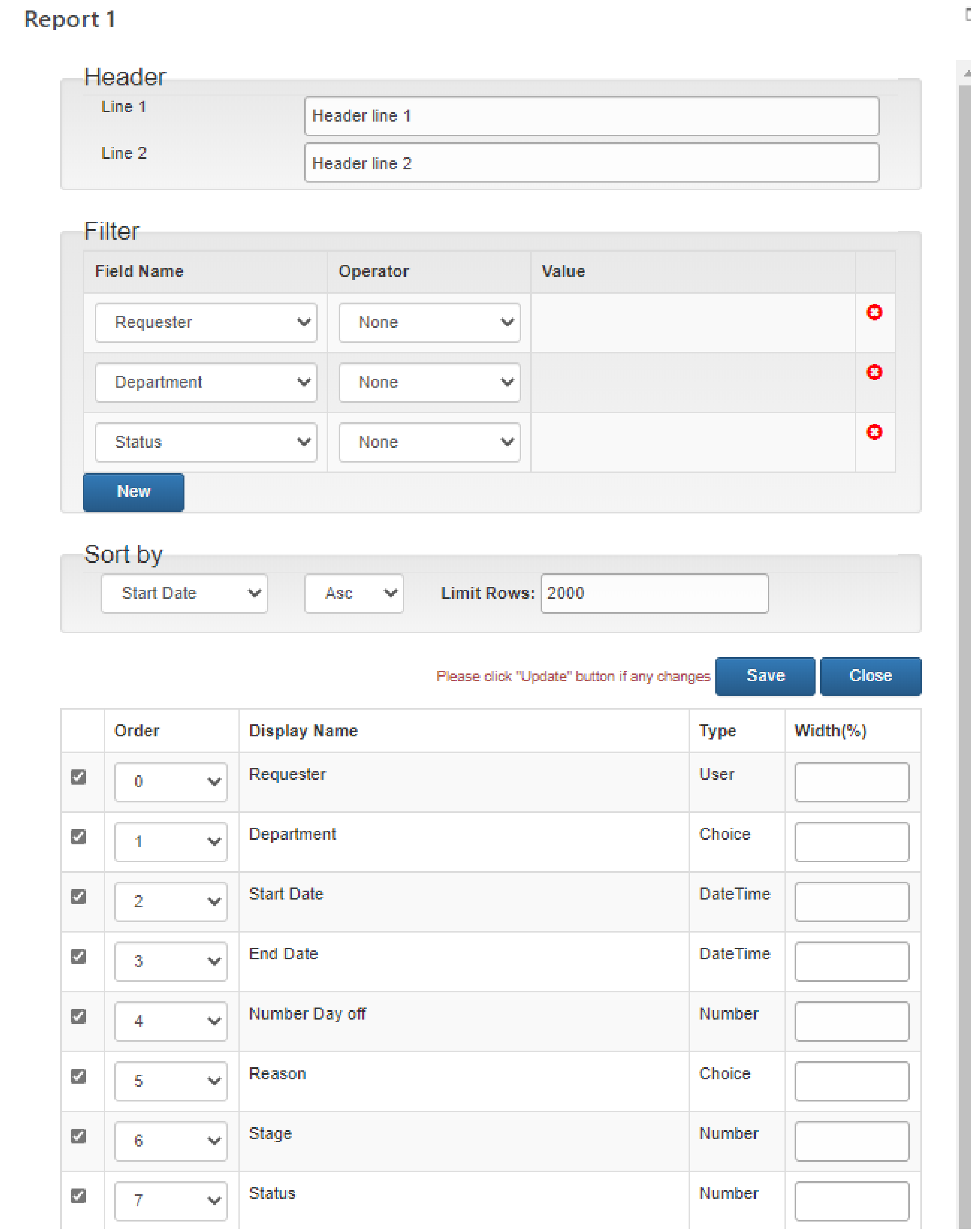
### View My Tasks

Please click "Update" button if any changes Save Change Close

| | Order | Display Name | Type | Width(%) |
|---|---|---|---|---|
| ☑ | 0 | Start Date | DateTime | |
| ☑ | 1 | End Date | DateTime | |
| ☑ | 2 | Number Day off | Number | |
| ☐ | 3 | Created | DateTime | |
| ☐ | 4 | Modified | DateTime | |

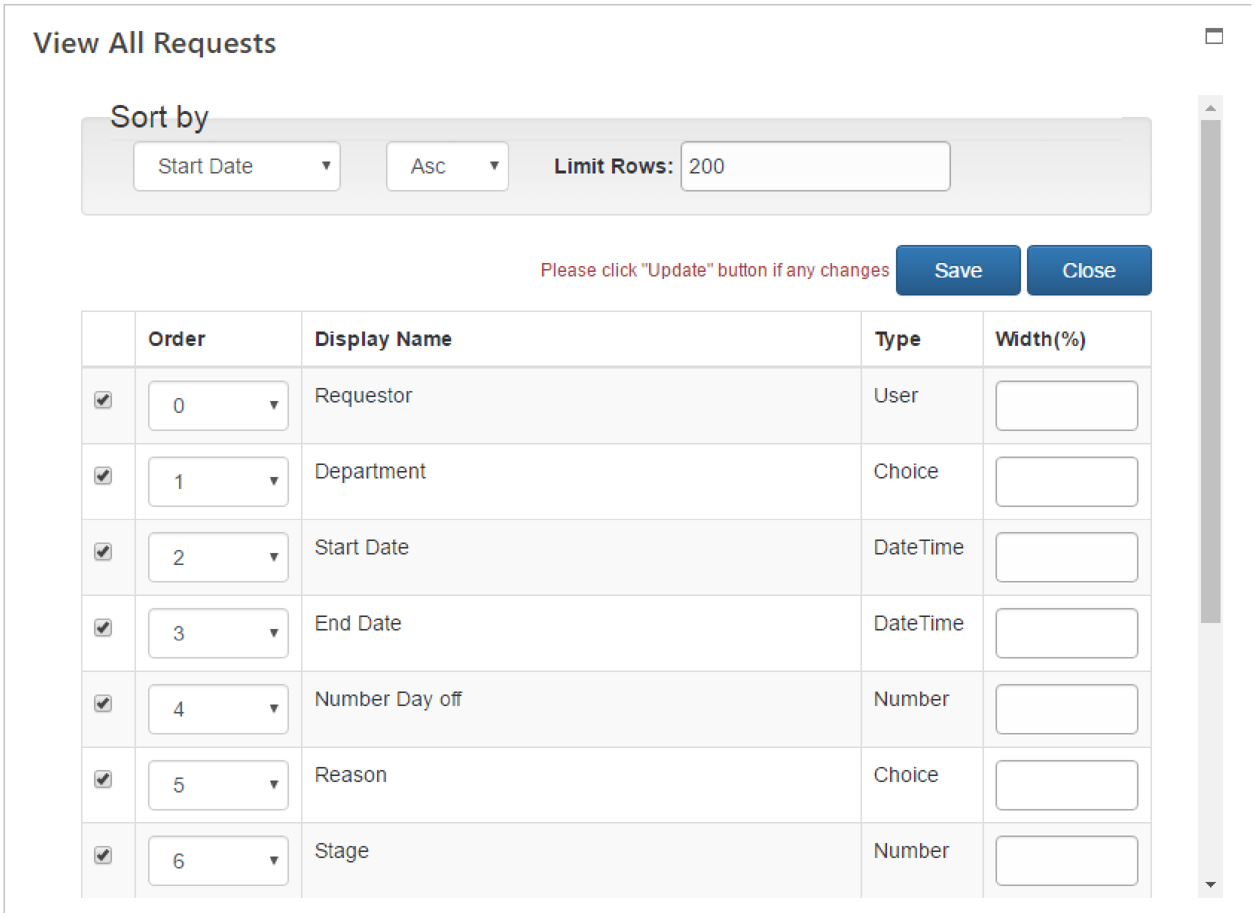
Please click "Update" button if any changes Save Change Close

## Reports


Report 1
Header
Line 1
Header line 1
Line 2
Header line 2
Filter
Field Name
Operator
Value
Requester
None
Department
None
Status
None
New
Sort by
Start Date
Asc
Limit Rows:
2000
Please click "Update" button if any changes
Save
Close
Order
Display Name
Type
Width(%)
0
Requester
User
1
Department
Choice
2
Start Date
DateTime
3
End Date
DateTime
4
Number Day off
Number
5
Reason
Choice
6
Stage
Number
7
Status
Number

## And Else

This form supports all types of field.



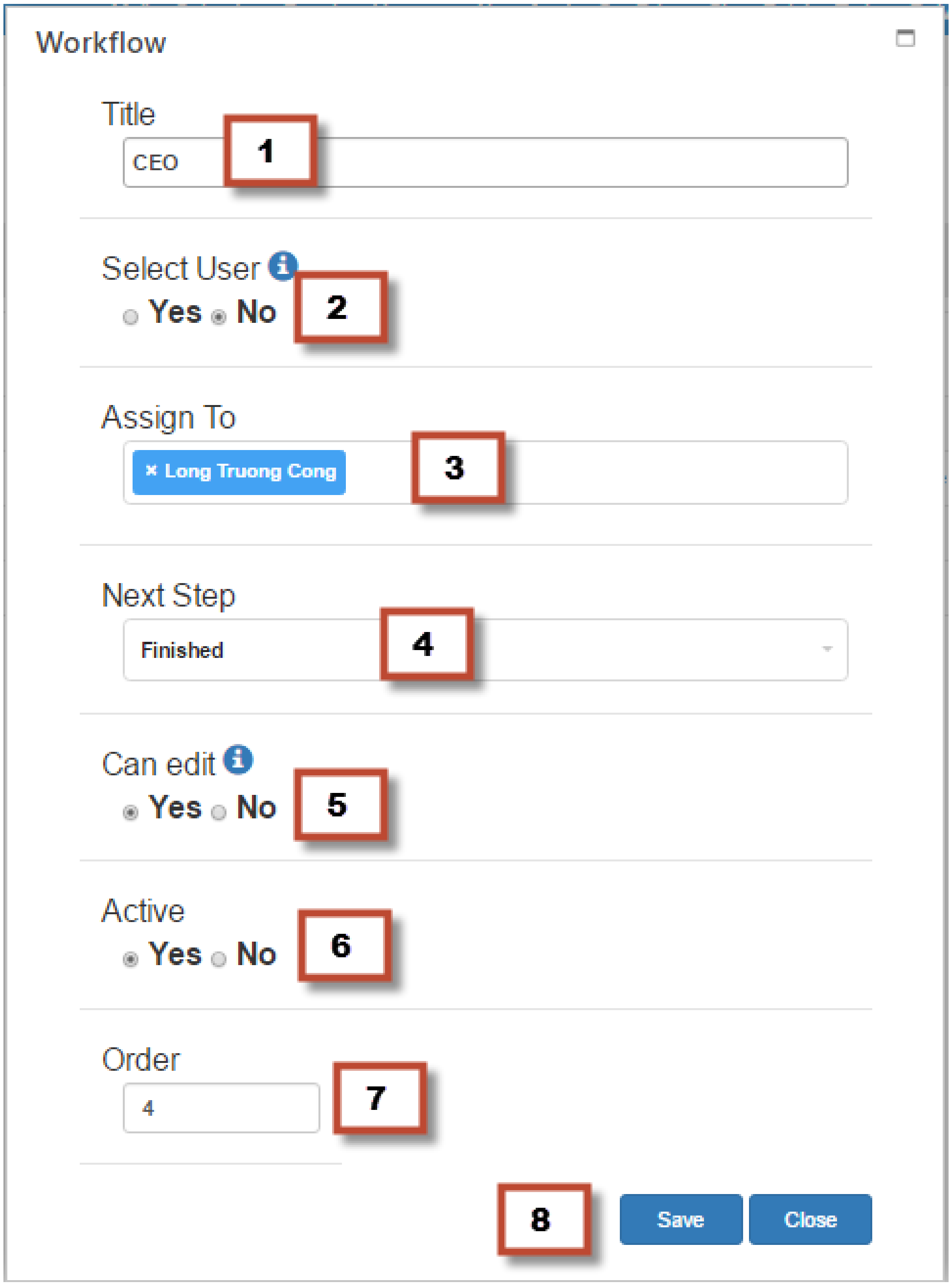

**Note**: Limit Rows is 0 that means 5000 items

# Workflow

Allows administrator to update the workflow for consistent the organization.

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


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




- (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

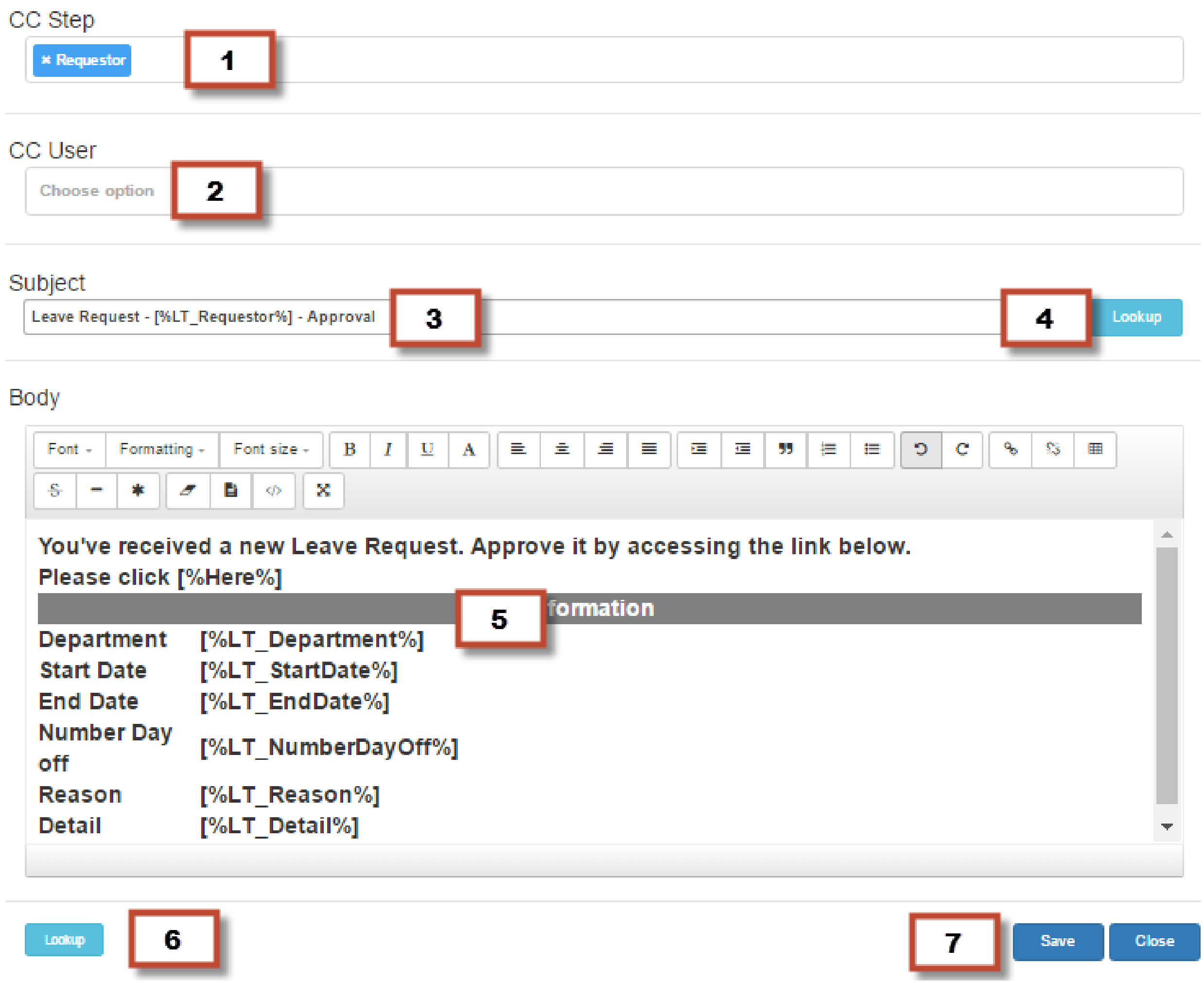
- ➢ Can't delete a step "Requestor" because this step is first step.
- ➢ Can't delete a step if this step is used

## Email templates

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

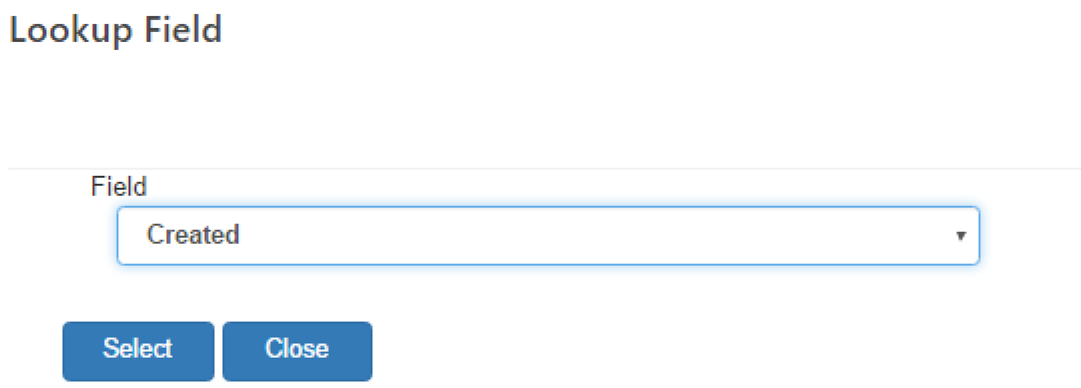
1. In left menu, click **Workflows.** Click **hand icon** to update an email template. **Hand up** is approval, **hand down** is reject


2. Edit an email template




- (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




## Setting up approval managers per department or user

There are 3 ways to set manager for the user

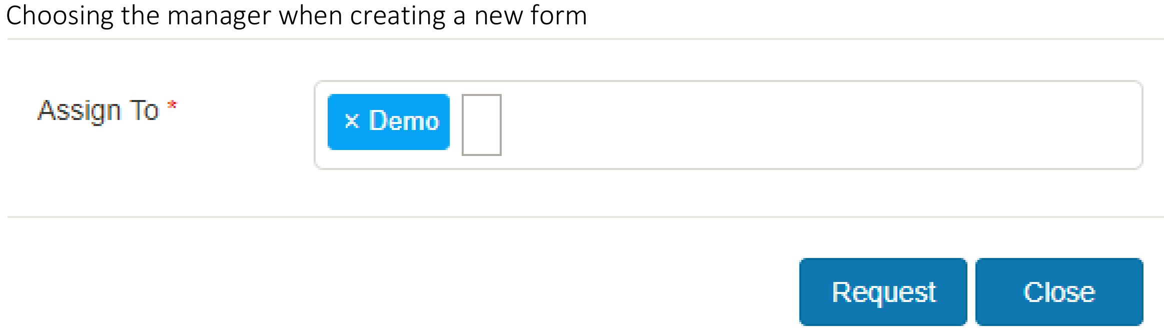
1. Choosing the manager (Assign To)
2. Setting manager for the department
3. Setting manager for the user

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

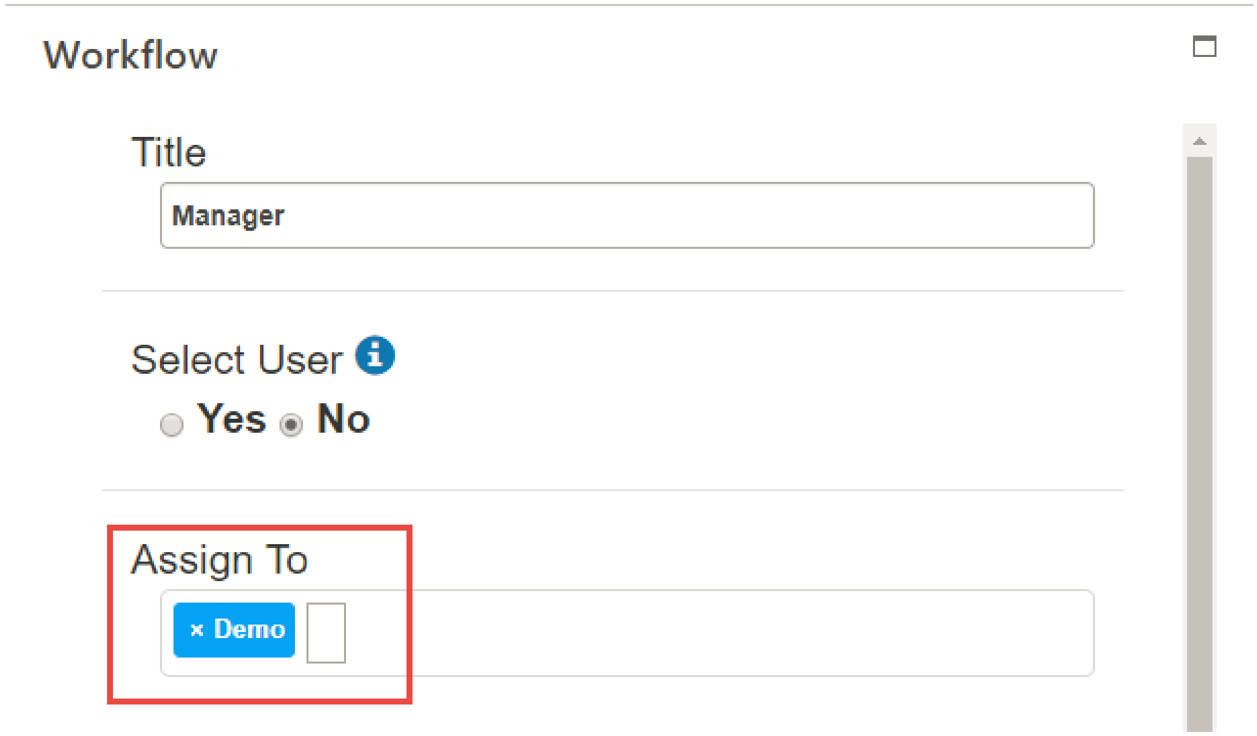
That way is the default way in the add-in. The configuration that go to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Workflow"


That way has 2 options

1. Choosing the manager when creating a new form




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



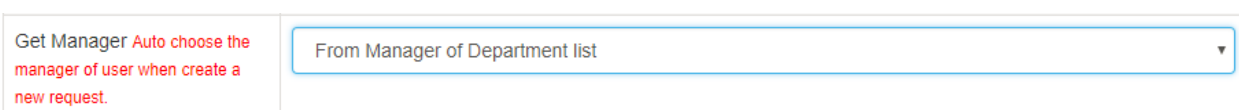

## Setting manager for the department

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 | |
|---|---|---|
| Infomation Technology | × Demo | Update |
| Human Resource | × LTAPPS Support | Update |
| Accounting | × Demo | Update |

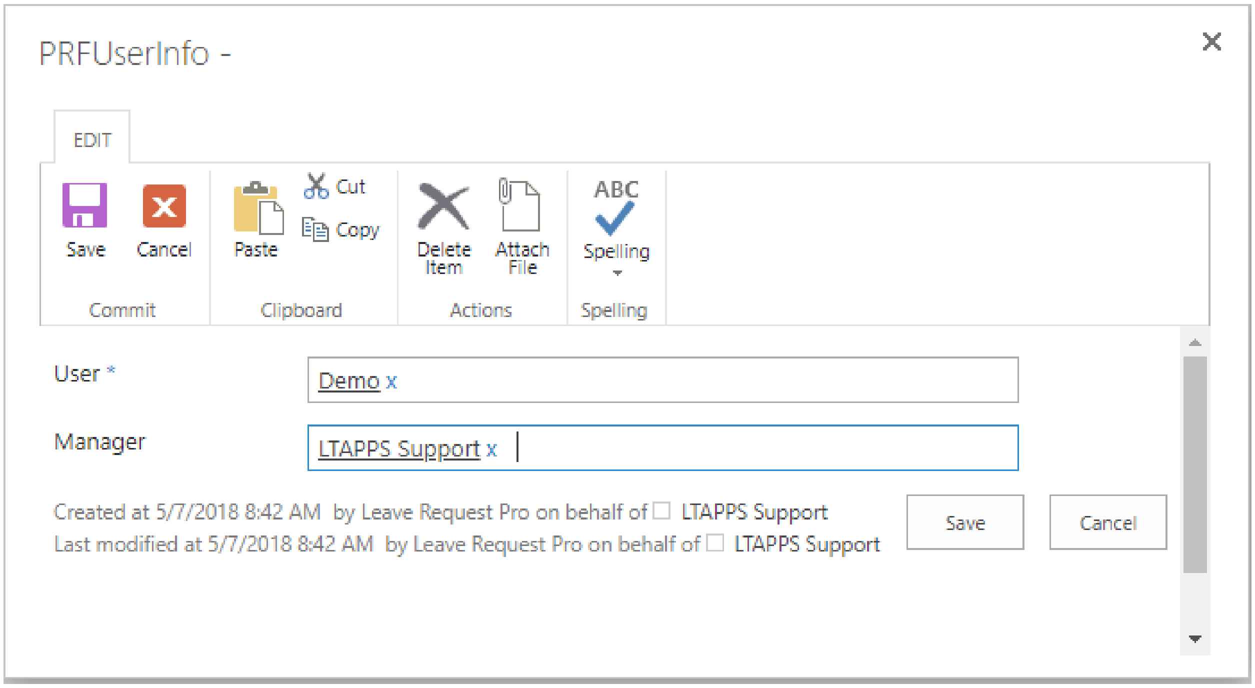
2. Going to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Manager of Department List"



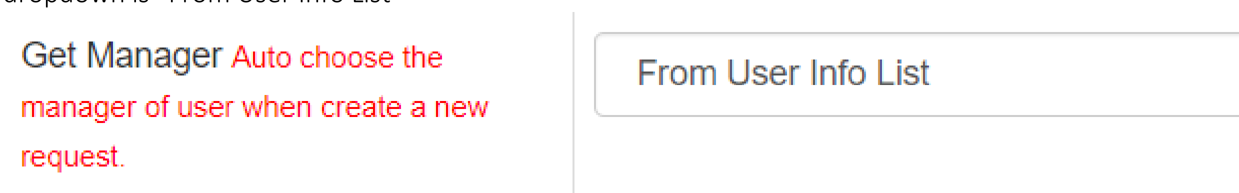

## Setting manager for the user

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"

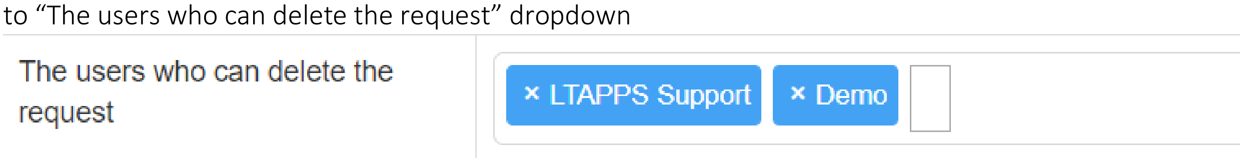



## Allows the user who can delete the request

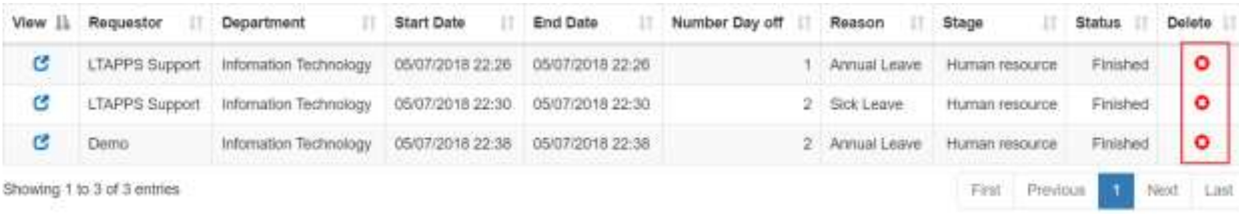
The configuration configures the rule which allows the user can delete the request after it is finished or not

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




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



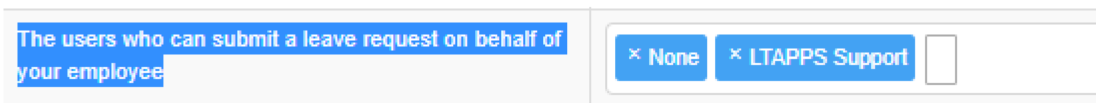
| View | Requestor | Department | Start Date | End Date | Number Day off | Reason | Stage | Status | Delete |
|---|---|---|---|---|---|---|---|---|---|
| | LTAPPS Support | Information Technology | 05/07/2018 22:26 | 05/07/2018 22:26 | 1 | Annual Leave | Human resource | Finished | |
| | LTAPPS Support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

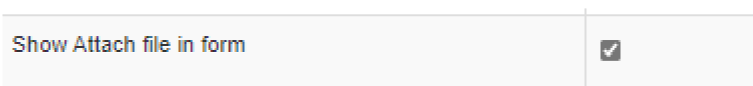
Going to the General Configuration page (Settings -> General Configuration) ->Then add the user to "The users who can submit a leave request on behalf of the employee" dropdown




## Attachment file in form (Medical document …)

The configuration allows attach the medical document … to form

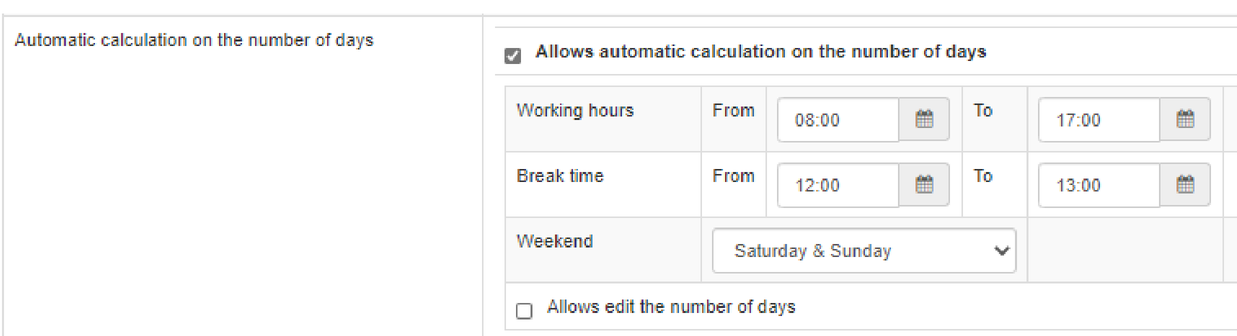
Going to the General Configuration page (Settings -> General Configuration) -> Check "Show Attach file in form" checkbox




## 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



## 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 |

## Date Format

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

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

## 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..)<br>If you select the SharePoint Group, Please make sure that "Who can view the membership of the group?" in Group Settings is everyone | Team Site Owners |

## 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 |