



# LEAVE REQUEST PRO for SharePoint

User guide

Version 3.1



## Table of Contents

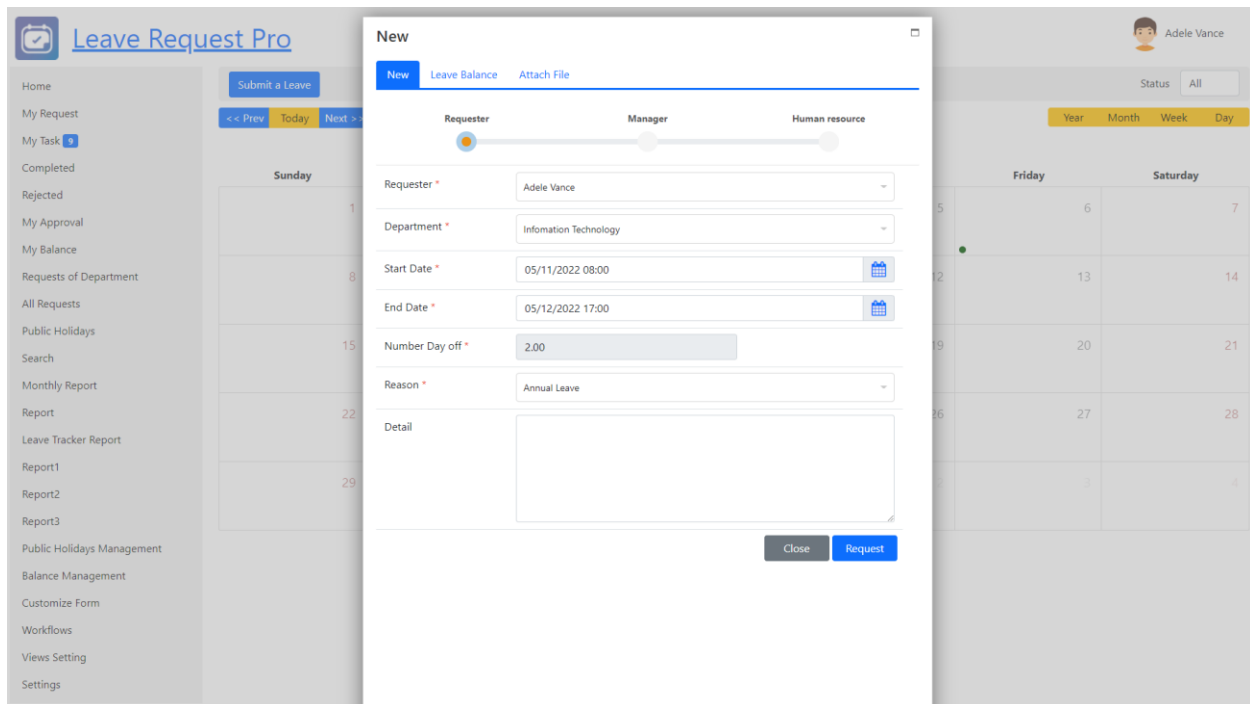
Overview .....	3
Submit a Leave .....	3
Approve/Reject a request .....	4
Cancel a request.....	5
View my request .....	6
View my task.....	6
View my balance .....	6
View all rejected requests.....	7
View all approved requests.....	7
View all requests of all employees.....	7
Public holidays .....	8
Search page.....	9
The balance of all employees.....	10
The Leave Tracker report .....	11
Report 1, 2 & 3 .....	11
Balance management .....	12
Add/Edit/Delete the public holiday .....	14

# 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.



## Submit a Leave

1. Open the app, click the **Home** or **My Request** link in the left menu
2. Click the **Submit a Leave** button

Submit a Leave

Status All

3. In the form that appears, input all fields as Start Date, End Date, Reason, ...

### New

**New** Leave Balance Attach File

Requester Manager Human resource

Department \* Infomation Technology

Start Date \* 04/07/2021 07:00

End Date \* 04/08/2021 18:00

Number Day off \* 2

Reason \* Annual Leave

Detail

Approver \* × James

Close Request

4. Select the approver who will approve the request. Then click the Request button. An email will be sent to the approver for notification

## Approve/Reject a request

1. Open the app, click the **My Task** link in the left menu
2. Click the **edit** icon to open the approval form or click the **Here** link in the email notification

<input type="checkbox"/>	View	Edit	Requester	Start Date	End Date	Number Day off	Reason	Step	Status
<input type="checkbox"/>			David	04/07/2021 08:00	04/07/2021 18:00	1	Annual Leave	Manager	<span style="background-color: #ffc107; padding: 2px;">Pending</span>

3. In the approval form, review all information & click the **Approve/Reject** button to accept or reject the request

- Click the **approve** button: If the current step is the last step, an email sends to the requester to inform the request is done. If the current step is not the last step, an email sends to the next approver to inform him/her that a request needs to approve
- Click the **reject** button: The request backs to the requester to update & an email sends to the requester to inform



4. To quickly Approve/Reject the request without opening the request form. Click the button **Approve/Reject** button at the right of the table

Show  entries Filter requests

<input type="checkbox"/>	View	Edit	Requester	Start Date	End Date	Number Day off	Reason	Step	Status	Comment	Actions
<input type="checkbox"/>			David	04/07/2021 08:00	04/07/2021 18:00	1	Annual Leave	Manager	<span style="background-color: #ffc107; padding: 2px;">Pending</span>	<input type="text" value="Comment"/>	<span style="background-color: #ffc107; padding: 2px;">Reject</span> <span style="background-color: #007bff; color: white; padding: 2px;">Approve</span>
<input type="checkbox"/>			David	04/07/2021 00:00	04/07/2021 18:30	1	Annual Leave	Manager	<span style="background-color: #ffc107; padding: 2px;">Pending</span>	<input type="text" value="Comment"/>	<span style="background-color: #ffc107; padding: 2px;">Reject</span> <span style="background-color: #007bff; color: white; padding: 2px;">Approve</span>

Showing 1 to 2 of 2 entries First Previous 1 Next Last

5. To approve/reject multi requests

- Select the request you want to approve/reject but check the checkbox. If you want to select all requests, click the check at the header of the table
- Then click the **Approve All/Reject All**



## Cancel a request

1. Open the app, click the **home** or **my request** link in the left menu
2. Select the **Status** field is **Pending**
3. Click the **delete icon** at the right of the table

Show  entries Filter requests

View	Department	Start Date	End Date	Number Day off	Reason	Step	Delete
	Infomation Technology	04/07/2021 08:00	04/07/2021 18:00	1	Annual Leave	Manager	
	Infomation Technology	04/07/2021 00:00	04/07/2021 18:30	1	Annual Leave	Manager	

Showing 1 to 2 of 2 entries First Previous **1** Next Last

## View my request

1. Open the app, click **my request** link in the left menu
2. Click the link in the ID column to view detail of the request
3. Click the **Status** field at the right top to filter requests by status
4. If you want to use the search function, use the search textbox

Show  entries Filter requests

View	Department	Start Date	End Date	Number Day off	Reason	Step	Delete
	Infomation Technology	04/07/2021 08:00	04/07/2021 18:00	1	Annual Leave	Manager	
	Infomation Technology	04/07/2021 00:00	04/07/2021 18:30	1	Annual Leave	Manager	

Showing 1 to 2 of 2 entries First Previous **1** Next Last

## View my task

1. Open the app, click **my task** link in the left menu
2. If you want to use the search function, use the search textbox at the right top of the table

Show  entries Filter requests

<input type="checkbox"/>	View	Edit	Requester	Start Date	End Date	Number Day off	Reason	Step	Status	Comment	Actions
<input type="checkbox"/>			David	04/07/2021 08:00	04/07/2021 18:00	1	Annual Leave	Manager	Pending	<input type="text" value="Comment"/>	<span>Reject</span> <span>Approve</span>
<input type="checkbox"/>			David	04/07/2021 00:00	04/07/2021 18:30	1	Annual Leave	Manager	Pending	<input type="text" value="Comment"/>	<span>Reject</span> <span>Approve</span>

Showing 1 to 2 of 2 entries First Previous **1** Next Last

## View my balance

1. Open the app, click **my Balance** link in the left menu
2. OnIn the balance page,
  - Taken tab: displays the number of days off by months



Taken My Balance

< Year 2021 >

Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Sum
Annual Leave	0	5.67	6	15.25	0	0	0	0	0	0	0	0	26.92
Sick Leave	0	0	0	0	0	0	0	0	0	0	0	0	0
Vacation Leave	0	0	0	0	0	0	0	0	0	0	0	0	0
Childcare Leave	0	0	0	0	0	0	0	0	0	0	0	0	0
Marriage Leave	0	0	0	0	0	0	0	0	0	0	0	0	0
Personal Leave	0	0	0	0	0	0	0	0	0	0	0	0	0
Time in Lieu	0	0	0	0	0	0	0	0	0	0	0	0	0
Unpaid Leave	0	0	0	0	0	0	0	0	0	0	0	0	0

- My balance tab: displays the number of days off, balance & remaining days

Taken My Balance

< Year 2021 >

Type	Taken	Balance	Remaining
Annual Leave	26.92	18	-9
Sick Leave	0	30	30
Vacation Leave	0	12	12
Childcare Leave	0	60	60
Marriage Leave	0	1	1
Personal Leave	0	6	6
Time in Lieu	0	2	2
Unpaid Leave	0	180	180

3. Use < > icons to switch the year

## View all rejected requests

1. Open the app, click the **completed** link in the left menu
2. If you want to use the search function, use the search textbox at the right top of the table

## View all approved requests

1. Open the app, click the **My Approval** link in the left menu
2. If you want to use the search function, use the search textbox at the right top of the table

## View all requests of all employees

1. Open the app, click the **All Requests** link in the left menu
2. Select the requester field for filter requests by the requester
3. Select the status field for filter requests by status

Requester:  Status:

[List View](#) [Calendar](#)

Show  entries Filter requests

View	Requester	Department	Start Date	End Date	Number Day off	Reason	Step	Status
	Tom	Infomation Technology	28/April/2021 14:00	30/April/2021 14:30	2.06	Annual Leave	Manager	<span style="background-color: #ffc107;">Pending</span>
	LTAPPS Support	Infomation Technology	28/April/2021 08:00	29/April/2021 17:00	2	Annual Leave	Requester	<span style="background-color: #dc3545;">Deleted</span>
	LTAPPS Support	Infomation Technology	27/April/2021 08:00	28/April/2021 17:00	2	Annual Leave	test	<span style="background-color: #28a745;">Finished</span>
	LTAPPS Support	Infomation Technology	26/April/2021 08:00	27/April/2021 17:00	2	Annual Leave	Human resource	<span style="background-color: #ffc107;">Pending</span>
	Admin	Infomation Technology	26/April/2021 08:00	27/April/2021 17:00	2	Annual Leave	Manager	<span style="background-color: #ffc107;">Pending</span>
	LTAPPS Support	Infomation Technology	20/April/2021 08:00	23/April/2021 14:00	3.63	Annual Leave	Manager	<span style="background-color: #ffc107;">Pending</span>
	LTAPPS Support	Infomation Technology	19/April/2021 08:00	30/April/2021 16:00	9.88	Annual Leave	Human resource	<span style="background-color: #ffc107;">Pending</span>
	LTAPPS Support	Infomation Technology	19/April/2021 08:00	23/April/2021 17:00	5	Annual Leave	Human resource	<span style="background-color: #28a745;">Finished</span>
	LTAPPS Support	Infomation Technology	05/April/2021 15:00	29/April/2021 17:00	8.25	Annual Leave	test	<span style="background-color: #28a745;">Finished</span>
	LTAPPS Support	Infomation Technology	05/April/2021 08:00	29/April/2021 17:00	9	Annual Leave	Manager	<span style="background-color: #ffc107;">Pending</span>

Showing 1 to 10 of 46 entries First Previous **1** 2 3 4 5 Next Last

#### 4. Switch the calendar tab to see requests in the calendar

Requester:  Status:

[List View](#) [Calendar](#)

[<< Prev](#) [Today](#) [Next >>](#) APRIL 2021 [Year](#) [Month](#) [Week](#) [Day](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

### Public holidays

1. Open the app, click the **Public holiday** in the left menu
2. Use the year dropdown to filter





Year

**List View** Calendar

#	From Date	To Date	Holiday Name
1	01/January/2021	01/January/2021	New Year's Day
2	10/February/2021	16/February/2021	Tet
3	21/April/2021	21/April/2021	Hung Kings Commemoration Day
4	30/April/2021	30/April/2021	Reunification Day
5	01/May/2021	01/May/2021	Labor Day

### 3. Switch to the **Calendar** tab

Year

List View **Calendar**

<< Prev Today Next >> **2021** Year Month Week Day

1 January	1 February	March	2 April
Hung Kings Commemoration Day Reunification Day			
1 May	June	July	August
September	October	November	December

## Search page

1. Open the app, click the **Search** link in the left menu
2. Select filters, then click the **Search** button

Field Name	Operator	Value
Requester	Equal	LTAPPS Support
Department	None	
Status	None	
Created	None	

Refresh Search

Show 15 entries Filter requests

View	Requester	Department	Start Date	End Date	Number Day off	Reason	Step	Status
	LTAPPS Support	Infomation Technology	03/August/2020 08:00	05/August/2020 17:00	3	Annual Leave	Requester	Deleted
	LTAPPS Support	Infomation Technology	03/August/2020 08:00	04/August/2020 17:00	2	Annual Leave	Administrator	Deleted
	LTAPPS Support	Infomation Technology	04/August/2020 08:00	04/August/2020 17:00	1	Annual Leave	Administrator	Deleted
	LTAPPS Support	Infomation Technology	07/August/2020 08:00	10/August/2020 17:00	2	Vacation Leave	Human resource	Finished
	LTAPPS Support	Infomation Technology	12/August/2020 08:00	14/August/2020 17:00	3	Childcare Leave	Human resource	Finished
	LTAPPS Support	Infomation Technology	12/August/2020 08:00	13/August/2020 13:00	1.5	Sick Leave	Requester	Finished
	LTAPPS Support	Infomation Technology	14/August/2020 08:00	17/August/2020 17:00	2	Annual Leave	Human resource	Finished
	LTAPPS Support	Infomation Technology	18/August/2020 08:00	18/August/2020 17:00	1	Sick Leave	Human resource	Finished
	LTAPPS Support	Infomation Technology	20/August/2020 08:00	21/August/2020 08:00	1	Sick Leave	Requester	Deleted
	LTAPPS Support	Infomation Technology	21/August/2020 08:00	27/August/2020 17:00	4	Personal Leave	Human resource	Finished
	LTAPPS Support	Infomation Technology	21/August/2020 08:00	25/August/2020 17:00	3	Annual Leave	Human resource	Finished

## The balance of all employees

1. Open the app, click the **Report** link in the left menu
2. Select filters Year, Quarter, Month, Requester & Type
3. Then click the **Report** button

Year	Quarter	Month
2021	All	All
Requester	Type	
All	All	

Refresh Report

Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Sum	Balance	Remaining
<b>Admin</b>															
Annual Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sick Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Vacation Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Childcare Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Marriage Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Overtime	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Personal Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Time in Lieu	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Unpaid Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>LTAPPS Support</b>															
Annual Leave	0	5.67	6	15.25	0	0	0	0	0	0	0	0	26.92	18	-9
Sick Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	30	30
Vacation Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	12	12
Childcare Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	60	60
Marriage Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Overtime	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Personal Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	6	6
Time in Lieu	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2
Unpaid Leave	0	0	0	0	0	0	0	0	0	0	0	0	0	180	180

4. Click **excel** or **word** icons at the top right of the table to extract data to file

## The Leave Tracker report

1. Open the app, click the **Leave Tracker Report** link in the left menu
2. Select filters **Requester, Year & Month**
3. Then click the **Report** button

Requester																																Sum
All																																
Year	2020																															
Month	Aug																															
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Report Refresh</span> <span>📄</span> </div>																																
Requester: All	Annual Leave		Sick Leave		Vacation Leave		Childcare Leave		Marriage Leave		Holidays																					
Year: 2020	Personal Leave		Time in Lieu		Unpaid Leave						Weekend																					
Month: Aug											Not Applicable																					
Month	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Sum
Harry																																
Aug			0	0	0	1	0			0	0	0	0	0			0	0	0	0	0			0	1	1					0	3
Mike																																
Aug			1	1	0	0	0			0	0	1	0.5	0			0	0	0	0	0			0	0	0					0	3.50
Tom																																
Aug			0	0	0	0	0			1	1	1	1	0			0	0	0	0	0			0	0	0					0	4
Vish																																
Aug			0	0	0	0	0			0	0	0	0	0			0	0	0	0	0			0	0	0					0	0
Matt																																
Aug			0	0	0	0	0			0	0	0	0	0			0	0	1	1	1			0	0	0					0	3
Stephen																																
Aug			0	0	0	0	0			0	0	0	0	0			0	0	0	0	0			0	0	0					0	0
Stephane																																
Aug			0	0	0	0	0			0	0	0	0	0			0	0	0	0	0			0	0	0					0	0
Scall																																




4. Click the **Excel** icon at the top right of the table to extract data from to file

## Report 1, 2 & 3

1. Open the app, click the **Report 1, 2 & 3** links in the left menu
2. Select filters
3. Then click the **Report** button



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

**Header line 1**

Header line 2

Requester	Department	Start Date	End Date	Number Day off	Reason	Step	Status
LTAPPS Support	Infomation Technology	03/August/2020 08:00	05/August/2020 17:00		3 Annual Leave	Requester	Deleted
LTAPPS Support	Infomation Technology	03/August/2020 08:00	04/August/2020 17:00		2 Annual Leave	Administrator	Deleted
LTAPPS Support	Infomation Technology	04/August/2020 08:00	04/August/2020 17:00		1 Annual Leave	Administrator	Deleted
LTAPPS Support	Infomation Technology	07/August/2020 08:00	10/August/2020 17:00		2 Vacation Leave	Human resource	Finished
LTAPPS Support	Infomation Technology	12/August/2020 08:00	14/August/2020 17:00		3 Childcare Leave	Human resource	Finished
LTAPPS Support	Infomation Technology	12/August/2020 08:00	13/August/2020 13:00		1.5 Sick Leave	Requester	Finished
LTAPPS Support	Infomation Technology	14/August/2020 08:00	17/August/2020 17:00		2 Annual Leave	Human resource	Finished
LTAPPS Support	Infomation Technology	18/August/2020 08:00	18/August/2020 17:00		1 Sick Leave	Human resource	Finished
LTAPPS Support	Infomation Technology	20/August/2020 08:00	21/August/2020 08:00		1 Sick Leave	Requester	Deleted
LTAPPS Support	Infomation Technology	21/August/2020 08:00	27/August/2020 17:00		4 Personal Leave	Human resource	Finished
LTAPPS Support	Infomation Technology	21/August/2020 08:00	25/August/2020 17:00		3 Annual Leave	Human resource	Finished
LTAPPS Support	Infomation Technology	26/August/2020 08:00	28/August/2020 17:00		1 Sick Leave	Human resource	Finished

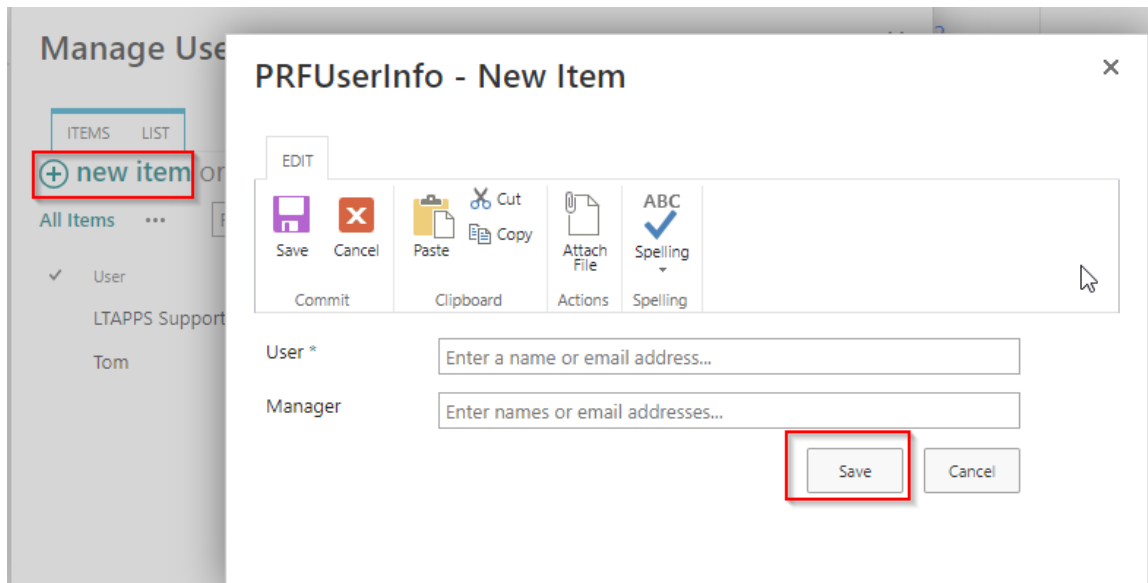
4. Click **excel** or **word** icons at the top right of the table to extract data to file

## Balance management

There are 2 ways to update the balance for employees

### By manual

1. Open the app, click the **Balance Management** link in the left menu
2. Click the **Manage user info list** link at the bottom right to add more users
3. In the popup page, click the **New** button to add the user
4. Select the user & click the **Save** Button



5. Close the popup to back to the **Balance Management** page
6. Click into the cell of the table & input the number of days

Year 2021									
User Name	Annual Leave	Sick Leave	Vacation Leave	Childcare Leave	Marriage Leave	Overtime	Personal Leave	Time in Lieu	Unpaid Leave
LTAPPS Support	18	30	12	60	1	—	6	2	180
Tom	—	—	<input style="border: 1px solid red;" type="text"/>	15	2	—	6	—	—

[Manage usersinfo list](#)

7. Use < or > icons to switch the year

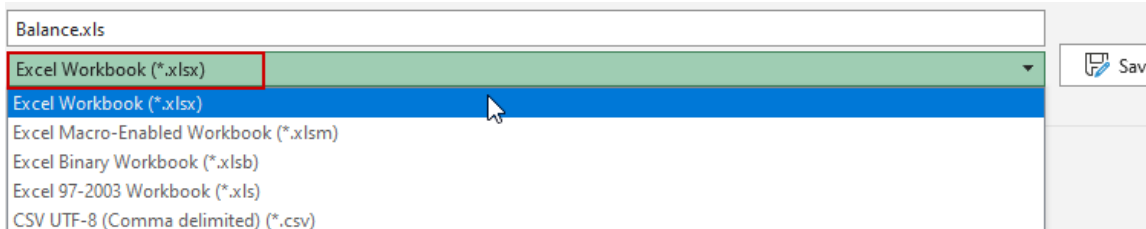
### By uploading the excel file

1. Open the app, click the **Balance Management** or **Settings** links in the left menu
2. Then click the **Upload the Balance** link
3. Click the Download Excel Template button to download the template excel file
4. Input the balance for each employee
  - No - Optional: Number of rows
  - Email – Mandatory: The email of the employee
  - Year – Mandatory: The year of the balance
  - Others (Leave Type) – Mandatory: The day allowance

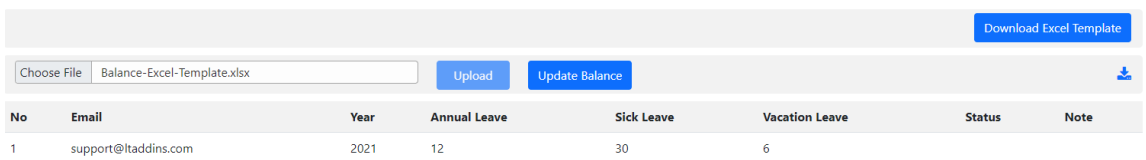


A	B	C	D	E	F
No	Email	Year	Annual Leave	Sick Leave	Vacation Leave
1	<a href="mailto:support@ltaddins.com">support@ltaddins.com</a>	2021	12	30	6

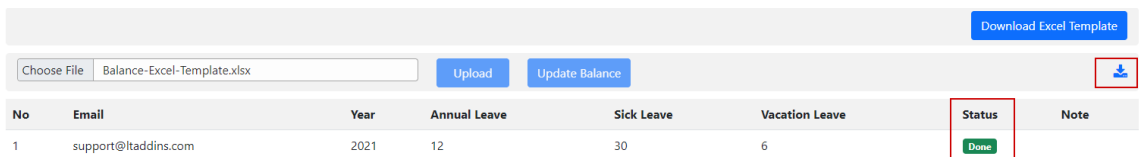
5. **Save As** the file as the **xlsx** file.



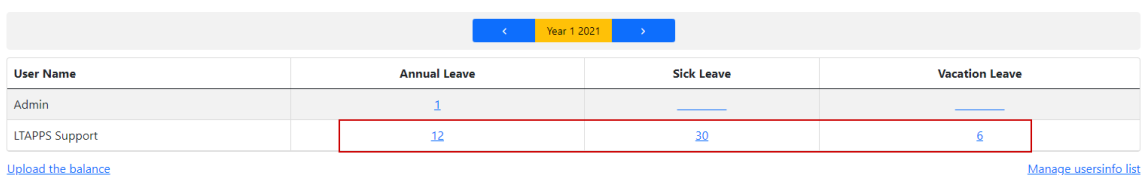
6. On the Upload Balance page, click the **Choose File** button & select the **xlsx** (Excel) file above. Then click the **Upload** button to get the data from the Excel file



7. Then click the **Update Balance** to update. The status column shows **done** after that. Click the **Download Icon** to get logs













8. Back to the Balance Management to see the result



## Add/Edit/Delete the public holiday


1. Open the app, click the **Public Holiday Management** link in the left menu
2. Click the **New** button to create a new
3. Click the **edit icon** to edit




New						Year	2021
Edit	Order	From Date	To Date	Holiday Name	Delete		
	1	01/01/2021	01/01/2021	New Year's Day			
	2	02/10/2021	02/16/2021	Tet			
	3	04/21/2021	04/21/2021	Hung Kings Commemoration Day			
	4	04/30/2021	04/30/2021	Reunification Day			
	5	05/01/2021	05/01/2021	Labor Day			

4. Input all fields & click the Save button

### Holiday

From Date  

To Date  

Holiday Name

Year

Order

5. Click the **delete icon** to delete

6. Use the **Year** dropdown to switch the year