

# APPROVAL REQUEST FORM SYSTEM

User guide – Administrator

Version 1.0

# MENU

- Overview ..... 3
- Step 1: Install the app to site ..... 4
- Step 2: Customize Left Menu ..... 4
- Step 3: Customize Form ..... 7
- Step 4: Views Setting..... 9
- Step 5: Change workflows ..... 12
- Step 6: Update Email Templates ..... 15

## Overview

This document helps to administrator setup the app “Approval Request Form System”. There are 6 steps that need administrator to setup.

1. Install the app to site
2. 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.
3. Customize Form: This step allows administrator to customize the form for consistent an organization. The administrator can add, edit, delete any field that he wants
4. Views Setting: This step allows administrator to choose the field that he wants to show in view
5. Change workflows. This step allows administrator to change the Workflow for consistent an organization.
6. Update Email templates. This step allows administrator to change the Email Template for consistent an organization.

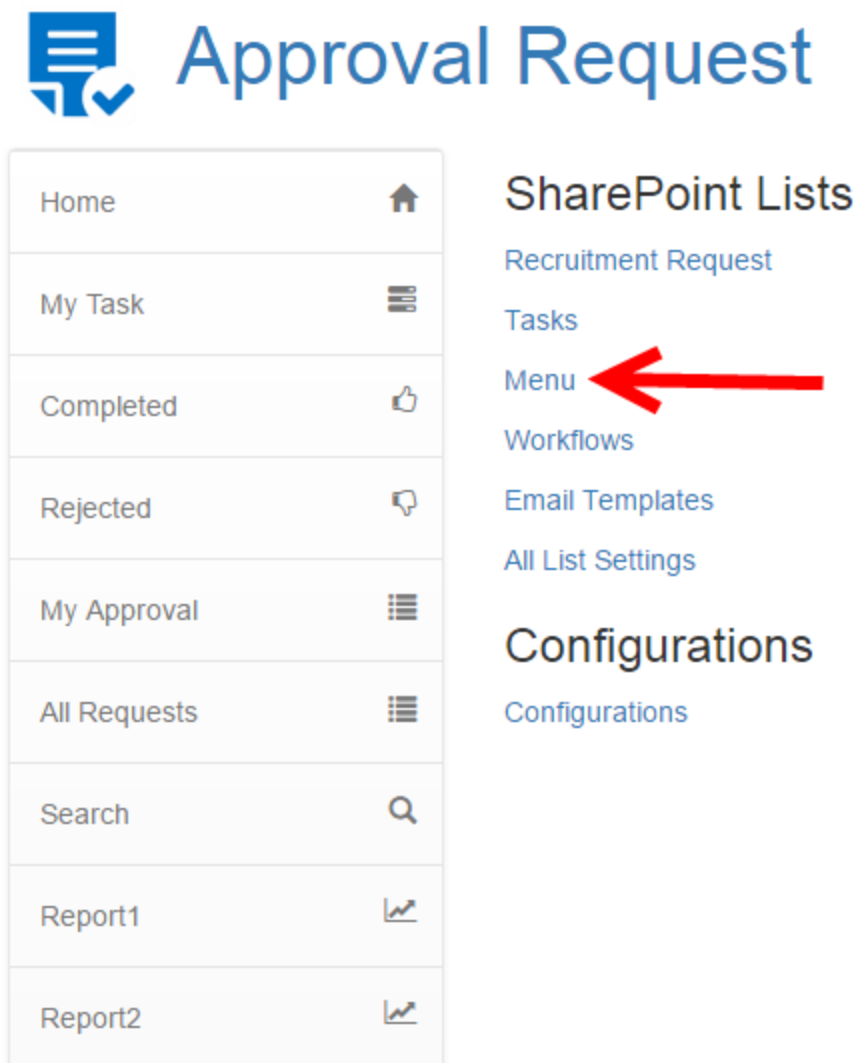
## Step 1: Install the app to site

## Step 2: 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.

### Edit Item

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



The screenshot displays the 'Approval Request' application interface. On the left, there is a vertical navigation menu with the following items: Home (with a house icon), My Task (with a list icon), Completed (with a thumbs up icon), Rejected (with a speech bubble icon), My Approval (with a list icon), All Requests (with a list icon), Search (with a magnifying glass icon), Report1 (with a line graph icon), and Report2 (with a line graph icon). On the right, the 'SharePoint Lists' settings page is visible, featuring a list of options: Recruitment Request, Tasks, Menu (highlighted with a red arrow), Workflows, Email Templates, and All List Settings. Below this, the 'Configurations' section is shown with a 'Configurations' link.

In **PRF Menu** List page, the administrator can edit any items if he wants.



+ 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 🚩	navallconfigforms	/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

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

## Share Permission

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



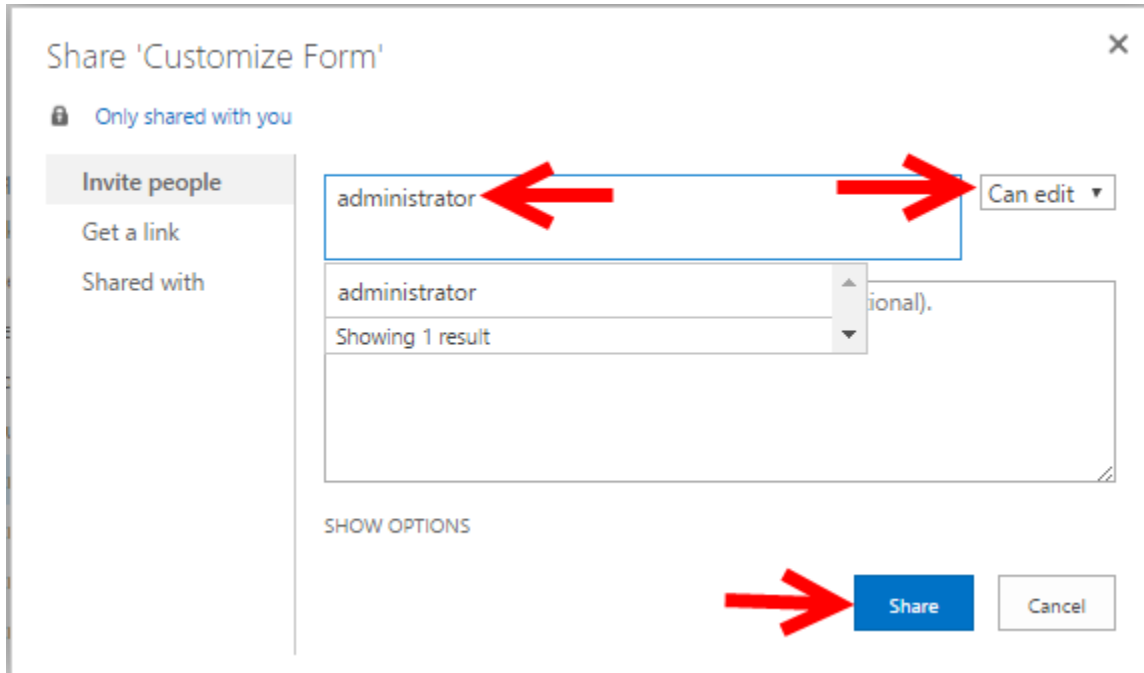
+ new item or edit this list

All Items ... Find an item 🔍

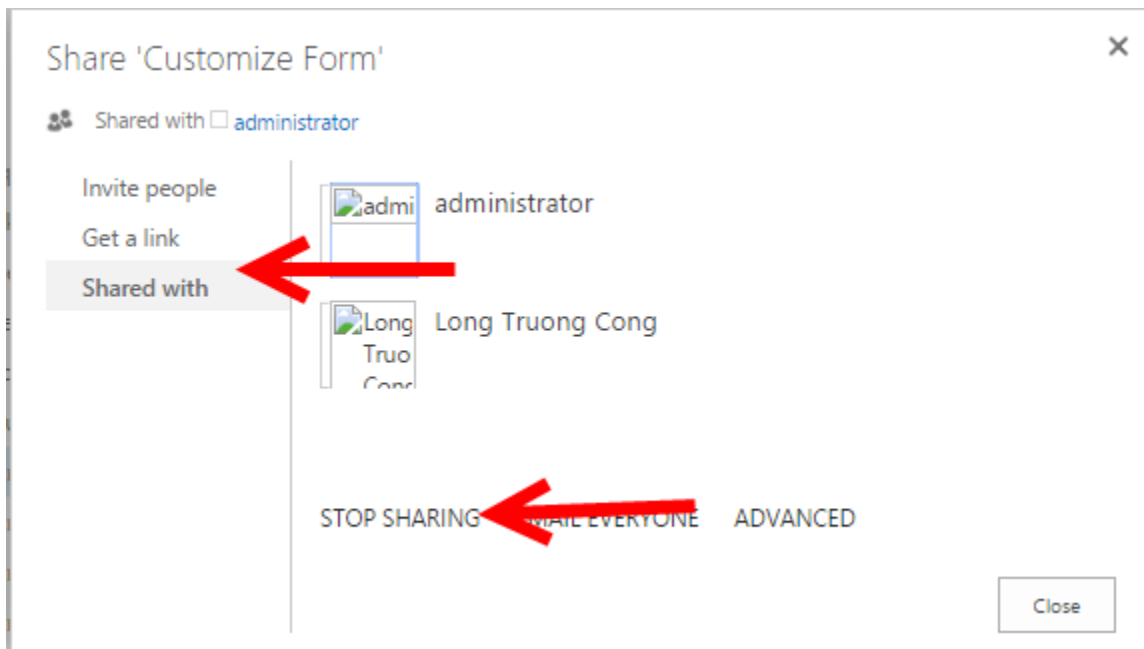
✓	Title	Code	URL Page	Order By
	Home 🚩	navhome	/Pages/LTMyRequests.aspx?navpara=navhome	1
	My Task 🚩	navmytask	/Pages/LTMyTasks.aspx?navpara=navmytask	2
	Completed 🚩	navcompleted	/Pages/LTCompleted.aspx?navpara=navcompleted	3
	Rejected 🚩	navrejected	/Pages/LTRejected.aspx?navpara=navrejected	4
	My Approval 🚩	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 🚩	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

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

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



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



**Note:** if user does have permission "View" in item, user will not see it in left menu

## Step 3: Customize Form

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

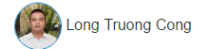
Type of field supports:








- Single line of text
- Multiple lines of text (Not supports RichText)
- 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

#### Approval Request

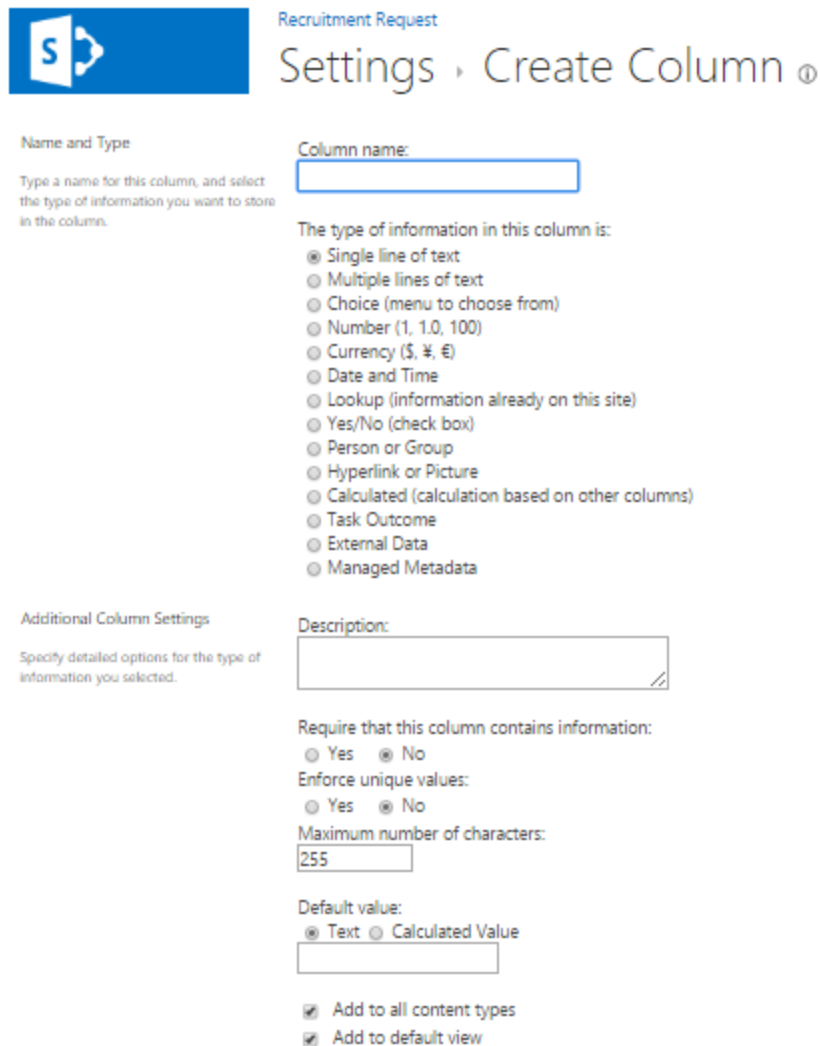


Order	Edit	Display Name	Static Name	Type
0		Job Title	LT_JobTitle	Text
1		Department	LT_Department	Choice
2		Number Of People Required	LT_NumberOfPeopleRequired	Number
3		Term Of Contract(Months)	LT_TermOfContract	Number
4		Competencies	LT_Competerencies	MultiChoice
5		Salary	LT_Salary	Currency
6		Key Success Factors	LT_KeySuccessFactors	Note

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

### New Field Form

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



**Recruitment Request**  
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

Add to all content types  
 Add to default view

## **Edit or Delete Field Form**

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



### 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 the type of information you selected.

Description:

Enforce unique values:

- Yes
- No

Maximum number of characters:

Default value:

- Text
- Calculated Value

### Column Validation

## Step 4: Views Setting

This step allows administrator to choose the field that he wants to show in view.

2 types of view setting form

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



# Approval Request

Home	
My Task	
Completed	
Rejected	
My Approval	
All Requests	
Search	
Report1	

Edit	View Name
	Home
	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, DateTime

## View My Tasks

Please click "Update" button if any changes

Save Change

Close

	Order	Display Name	Type	Width(%)
<input checked="" type="checkbox"/>	0	Job Title	Text	40
<input checked="" type="checkbox"/>	1	Number Of People Required	Number	20
<input checked="" type="checkbox"/>	2	Created	DateTime	20
<input type="checkbox"/>	3	Cost Center	Text	
<input type="checkbox"/>	4	Direct Report To	Text	
<input type="checkbox"/>	5	Hay Grade	Text	
<input type="checkbox"/>	6	Modified	DateTime	
<input type="checkbox"/>	7	Term Of Contract(Months)	Number	
<input type="checkbox"/>	8	What is the purpose of job?	Text	
<input type="checkbox"/>	9	Year Of Experience Required	Number	

### And Else

This form supports all types of field.

**View Home**

Sort by

Created Desc Limit Rows: 200

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



	Order	Display Name	Type	Width(%)
<input checked="" type="checkbox"/>	0	Job Title	Text	40
<input checked="" type="checkbox"/>	1	Department	Choice	20
<input checked="" type="checkbox"/>	2	Number Of People Required	Number	20
<input type="checkbox"/>	3	Competencies	MultiChoice	
<input type="checkbox"/>	4	Cost Center	Text	
<input type="checkbox"/>	5	Created	DateTime	
<input type="checkbox"/>	6	Direct Report To	Text	
<input type="checkbox"/>	7	Hay Grade	Text	


**Note:** Limit Rows is 0 that means unlimited













## Step 5: Change workflows





This step allows administrator to change the Workflow for consistent an organization.

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

 **Approval Request**  Long Truong Cong

Home  + 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	Long Truong Cong	No	Finished	3	Yes	 	

My Task   
Completed   
Rejected   
My Approval 

2. If want to new step. Pease 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**

---

- (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

The screenshot shows a 'Workflow' form with the following fields and controls:

- Title:** A text input field containing the value 'Manager'.
- Select User:** A section with two radio buttons, 'Yes' (selected) and 'No'.
- Next Step:** A dropdown menu with 'Human resource' selected.
- Active:** A section with two radio buttons, 'Yes' (selected) and 'No'.
- Order:** A text input field containing the value '2'.
- Buttons:** Two blue buttons labeled 'Save' and 'Close' are located at the bottom right of the form.

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

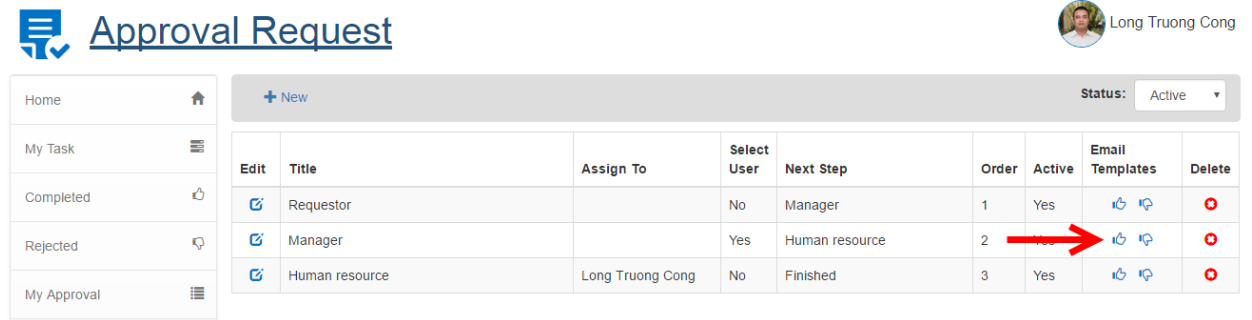
**Note**

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

## Step 6: Update Email Templates

This step allows administrator to change the Email Template for consistent an organization.

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



The screenshot shows the 'Approval Request' interface. On the left is a navigation menu with options: Home, My Task, Completed, Rejected, and My Approval. The main content area has a '+ New' button and a 'Status: Active' dropdown. Below this is a table with the following data:

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	Long Truong Cong	No	Finished	3	Yes		

A red arrow points to the 'Email Templates' column for the 'Manager' step (Order 2).

2. Edit an email template

CC Step

\* Requestor **1**

---

CC User

Choose option **2**

---

Subject

Recruitment Request - [%LT\_JobTitle%] - Approval **3** **4** Lookup

---

Body

Font - Formatting - Font size - B I U A [List Icons] [Undo] [Redo] [Link] [Image] [Table]

\$ - \* [Icons] [Close]

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

Information	
Job Title	[%LT_JobTitle%]
Hay Grade	[%LT_HayGrade%] <b>5</b>
Department	[%LT_Department%]
Direct Report To	[%LT_DirectReportTo%]
Cost Center	[%LT_CostCenter%]
Number of	[%LT_NumberOfPeopleRequired%]

---

Lookup **6** **1** 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

**Competencies** ▼

Competencies

Cost Center

Created

**Department**

Direct Report To

Hay Grade

Job Title

Key Success Factors

Modified

Number Of People Required

Requestor

Salary

Special Qualification

Stage

Status

Term Of Contract(Months)

What is the purpose of job?

Year Of Experience Required

Here