APPROVAL REQUEST FORM SYSTEM

User guide – Administrator

Version 1.0

MENU

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.

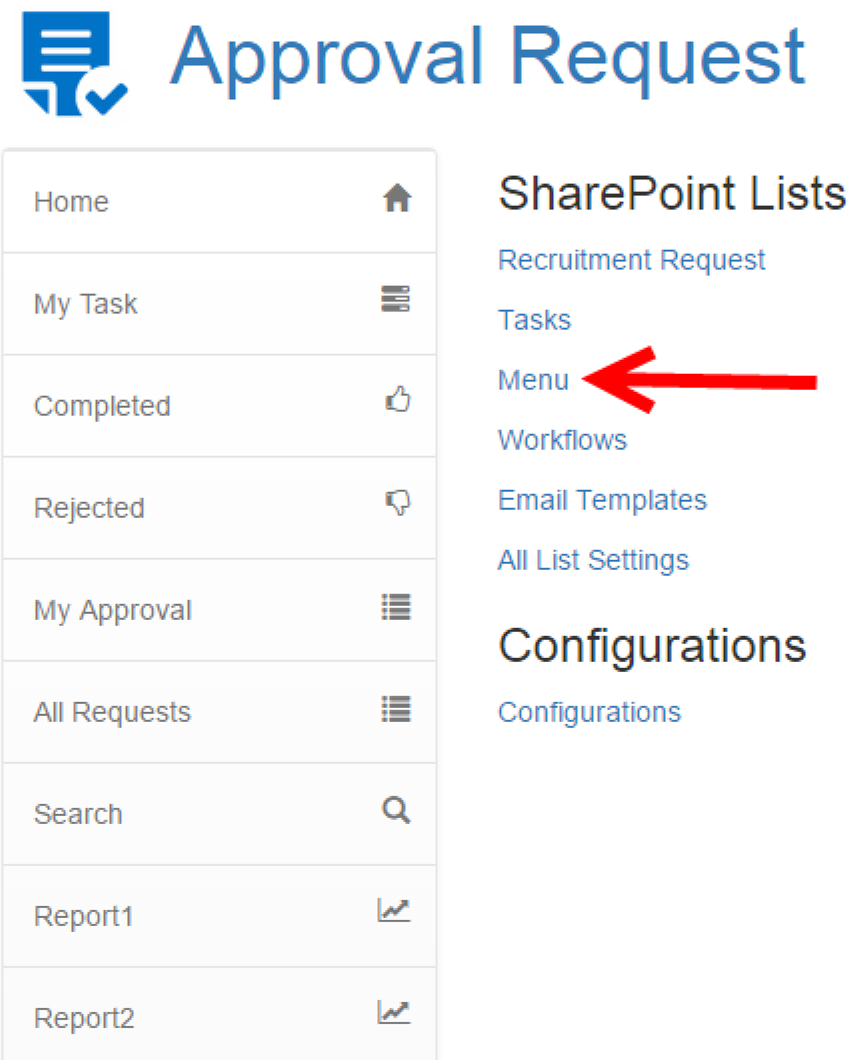
Step 1: Install the app to site

Step 2: Customize Left Menu

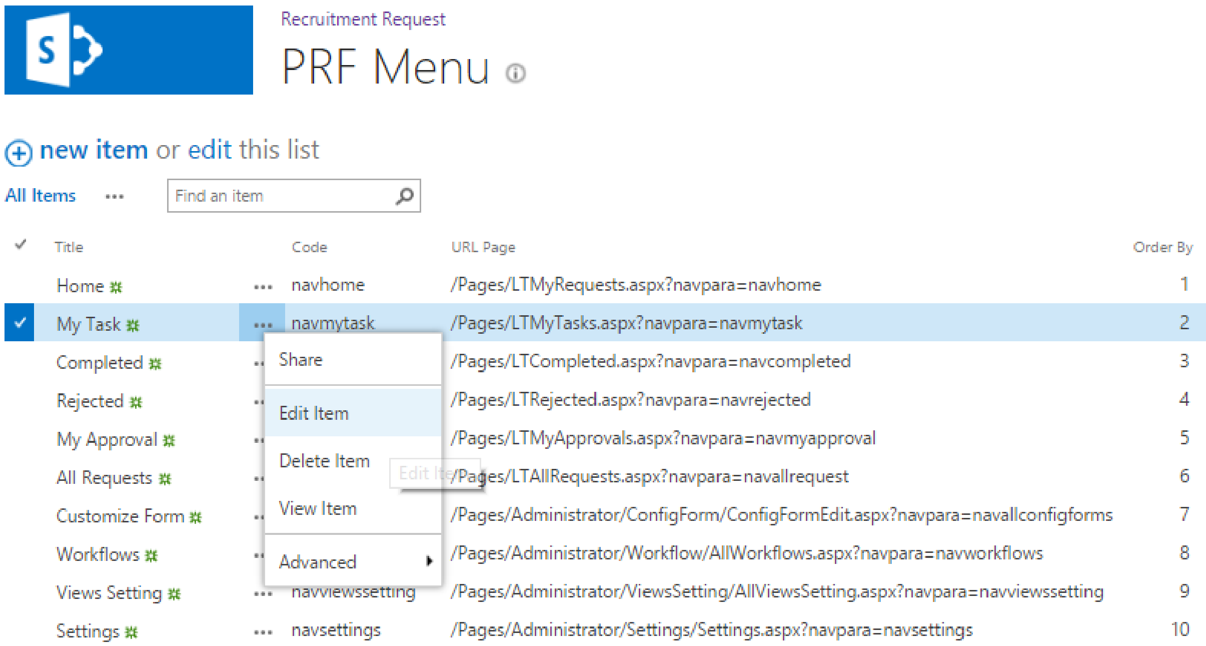
This step allows administrator to customize the left menu for consistent an organization. The administrator can reorder items in left menu and share permission for each item of left menu.

Edit Item

In **settings** page, Click "**Menu**" under **SharePoint Lists** Tab

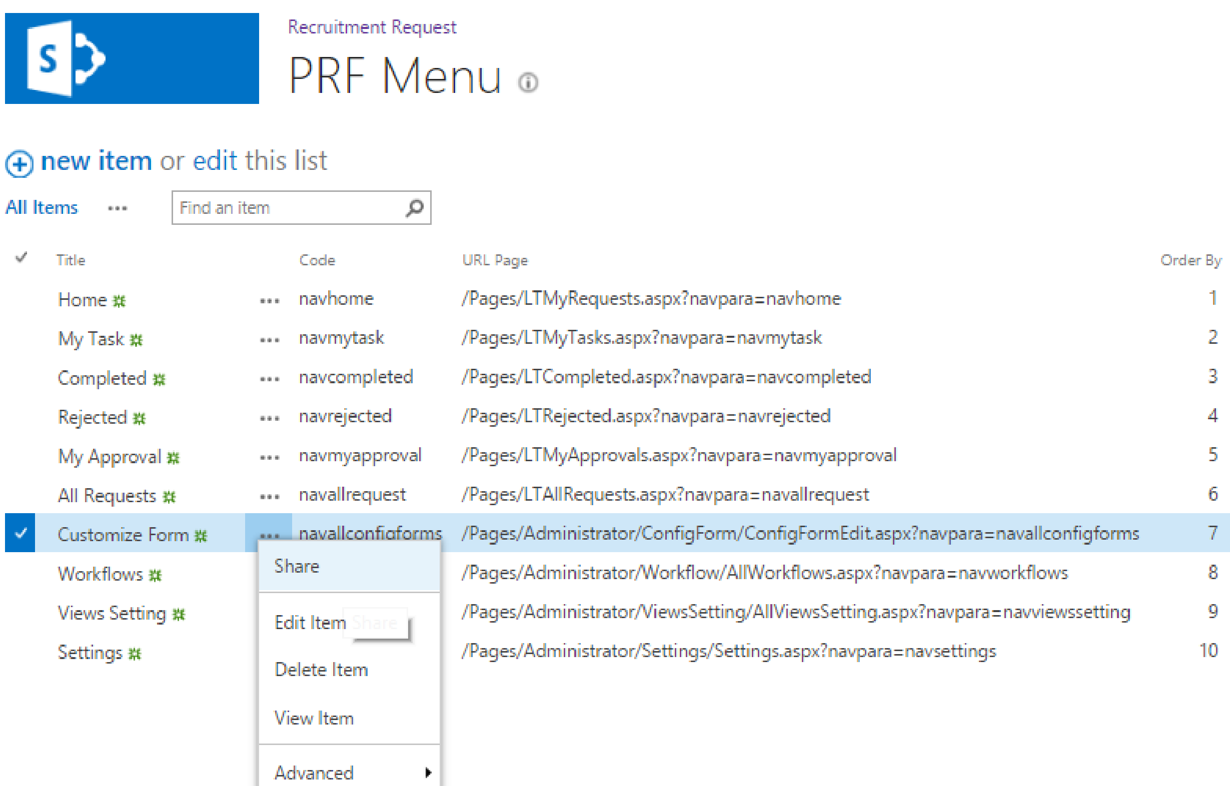


In **PRF Menu** List page, the administrator can edit any items if he wants.

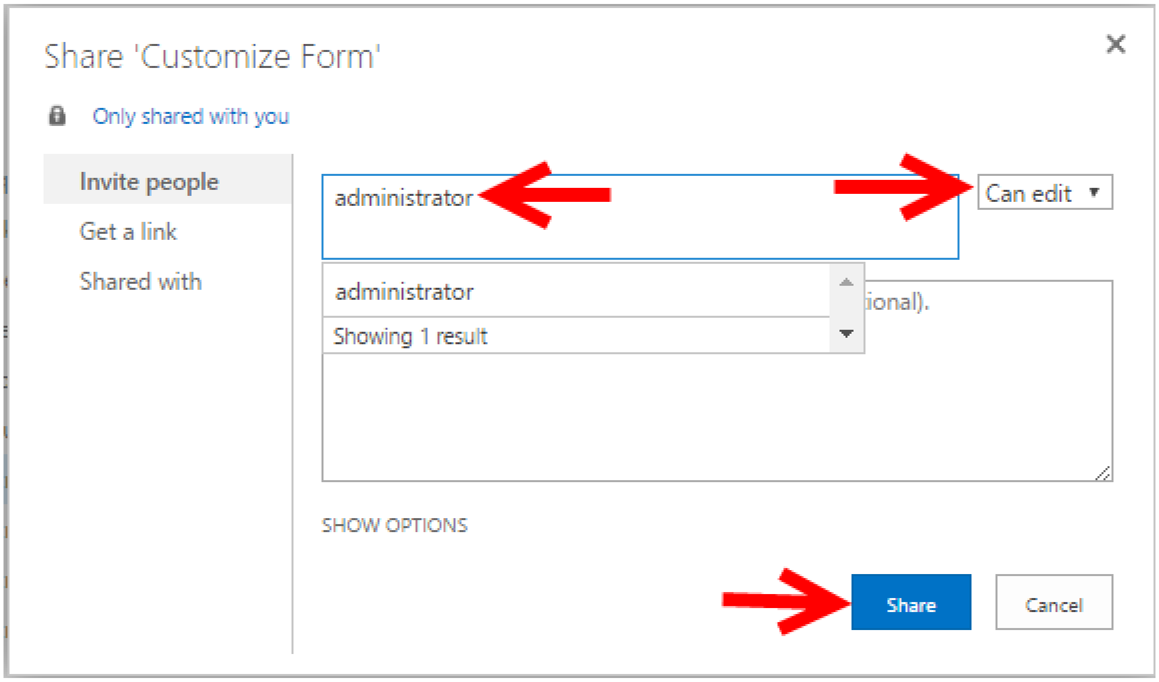


Share Permission

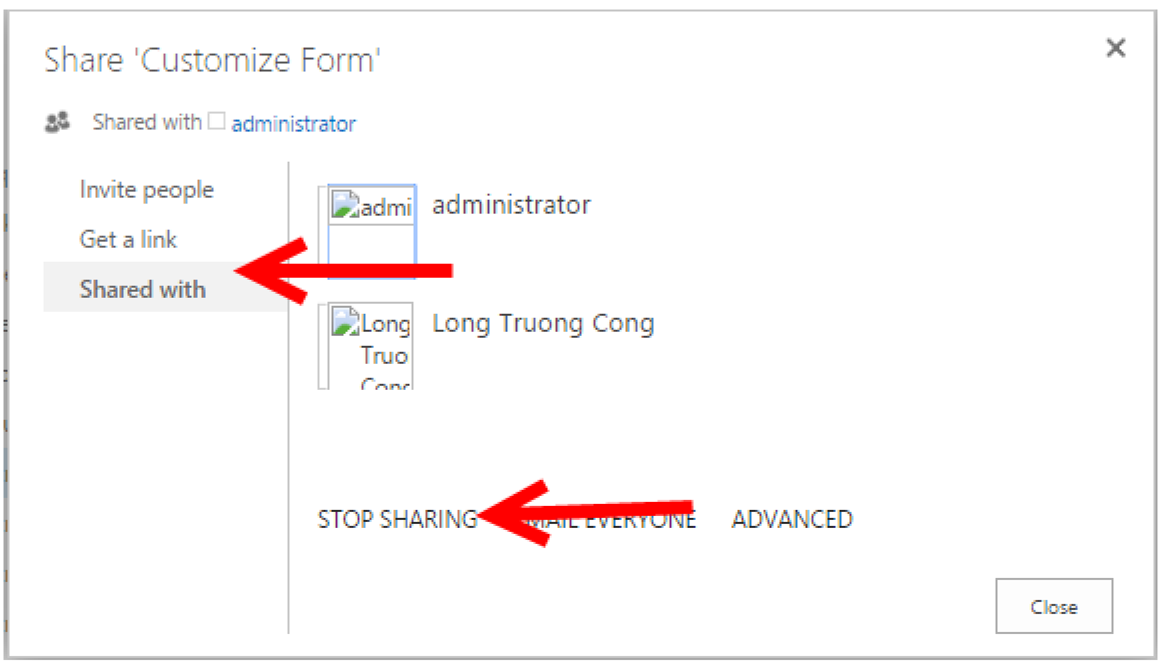
In **PRF Menu** List page, Click **Share** in context menu



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



If you want to remove all permissions in the item, select **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

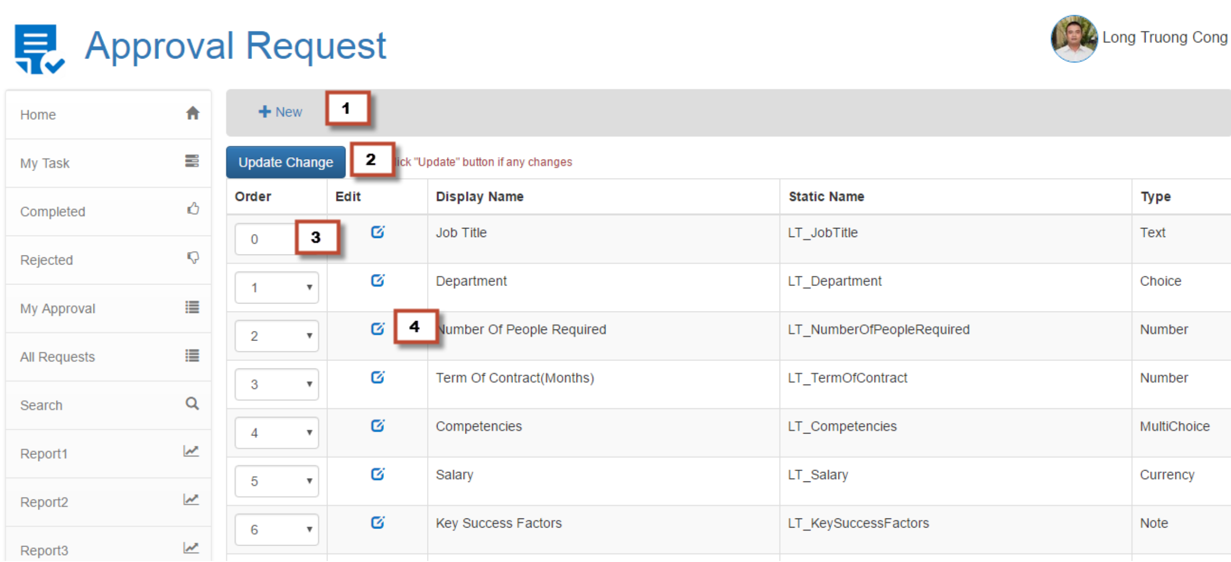
This step allows administrator to customize the form for consistent an organization. The administrator can add, edit, delete any field that he wants. This tool supports many types of SharePoint Field

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

<u>All Fields of Form</u>

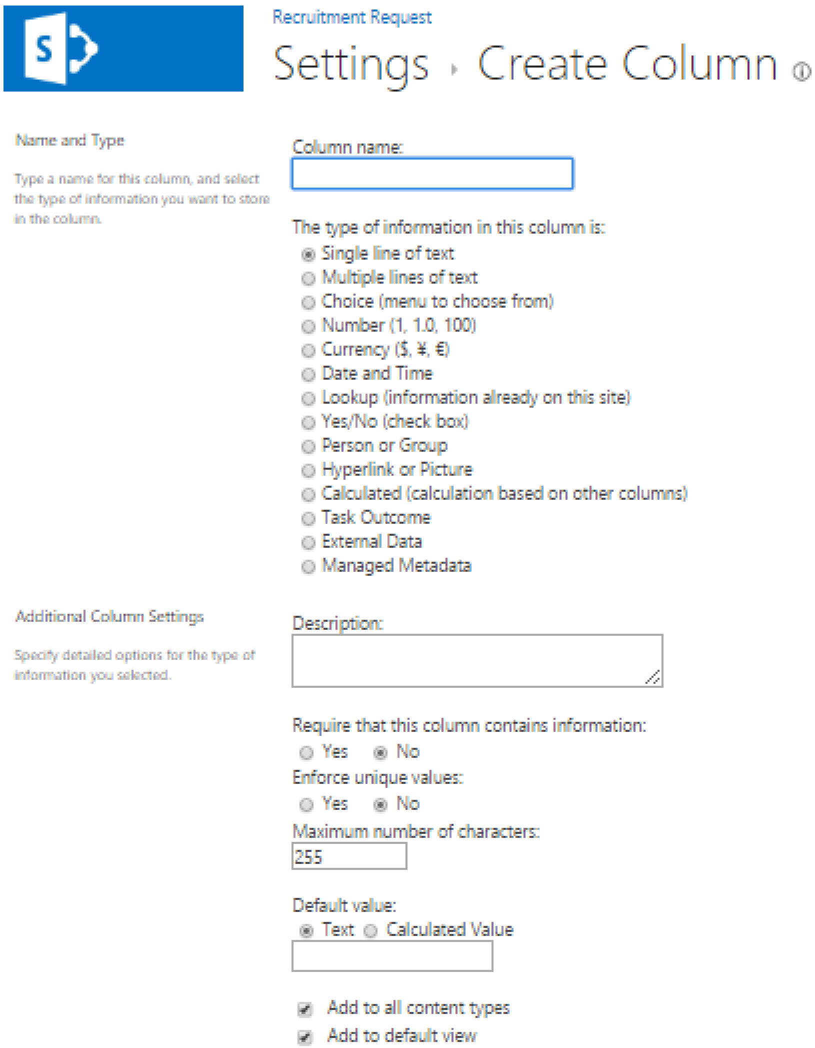
This view that administrator can add, edit, delete and reorder the field. When any field changes, please click “Update changes” button



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

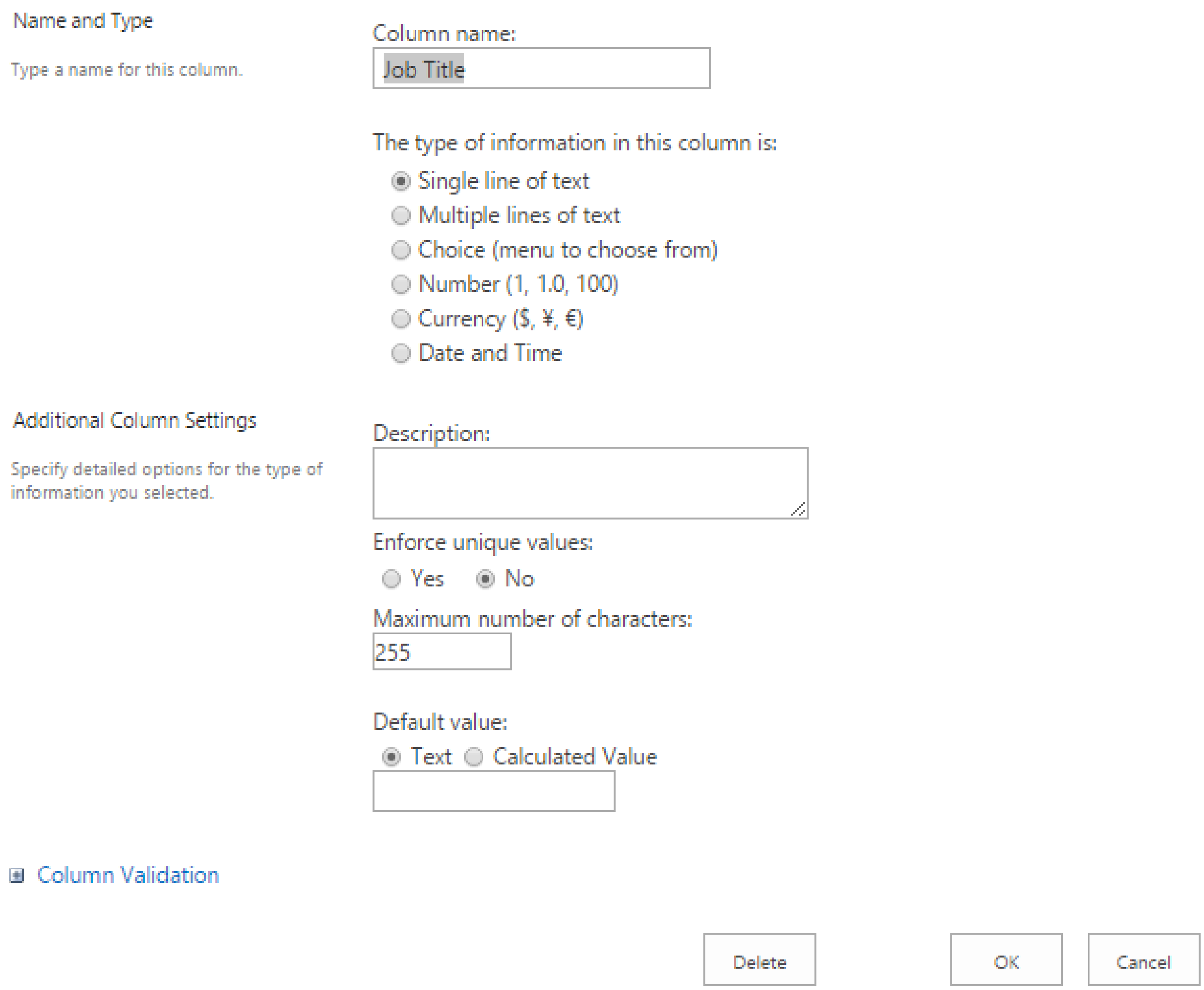
<u>New Field Form</u>

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



Edit or Delete Field Form

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

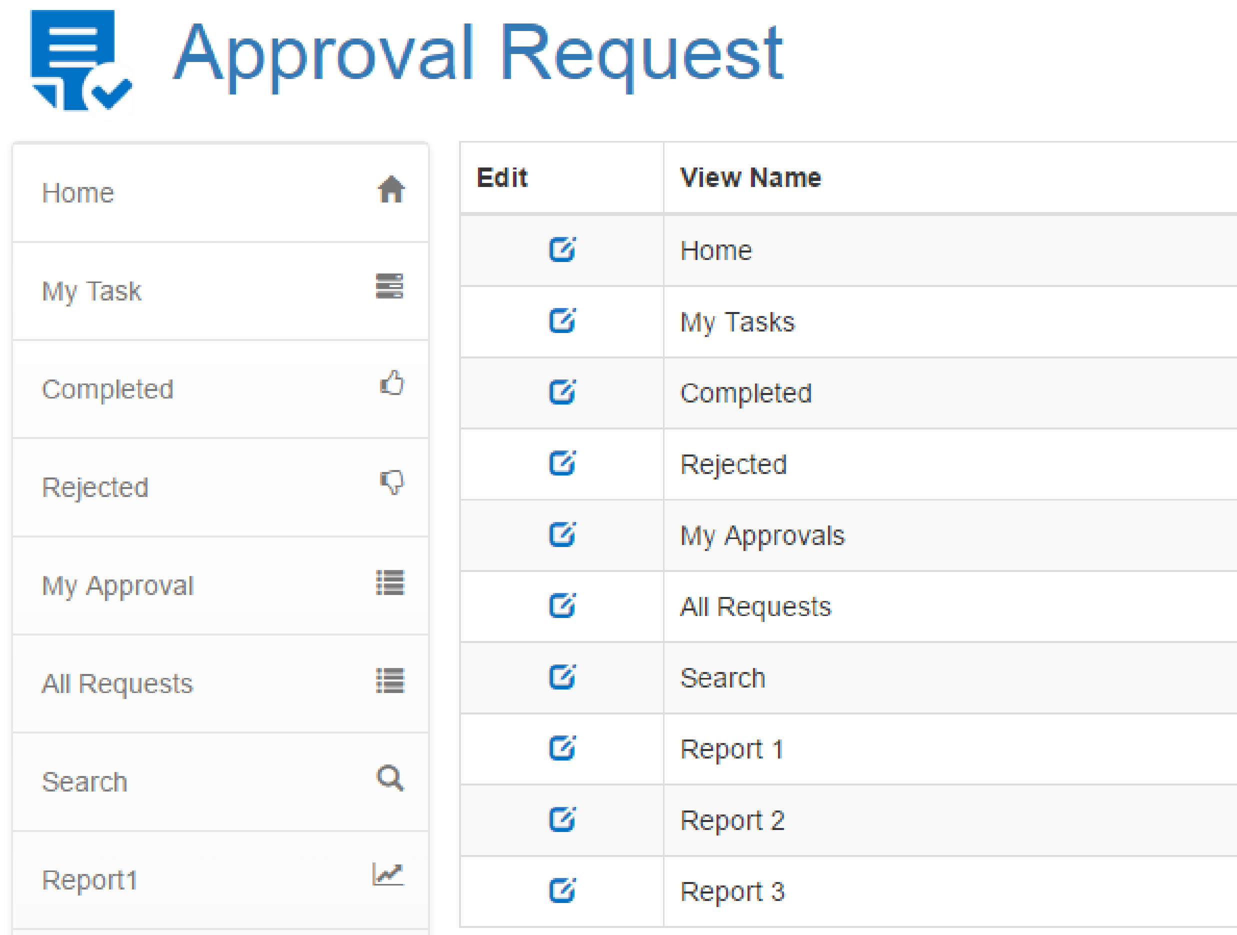


Step 4: Views Setting

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

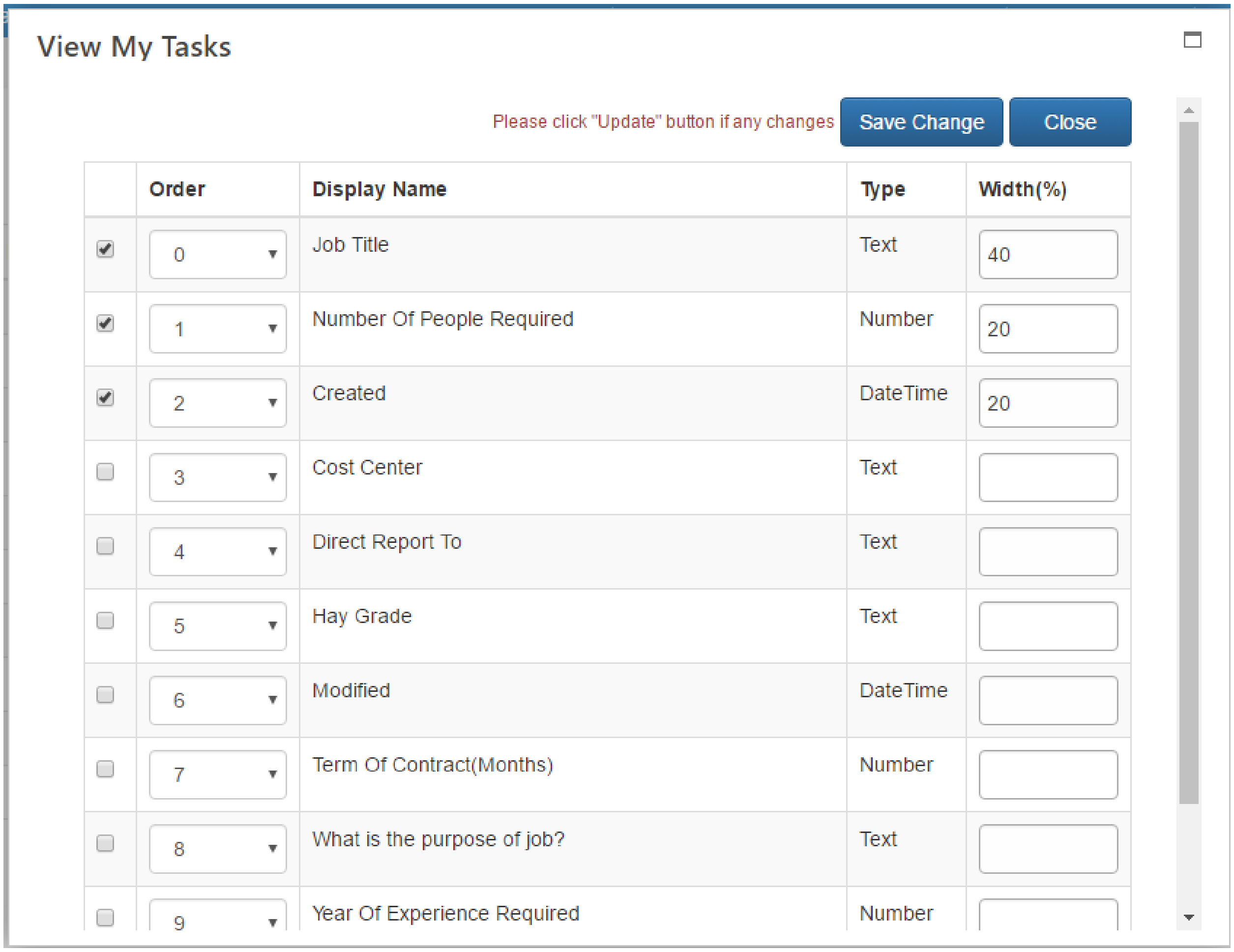
2 types of view setting form

- View setting form for “My Task” and “My Approval”
- And for else



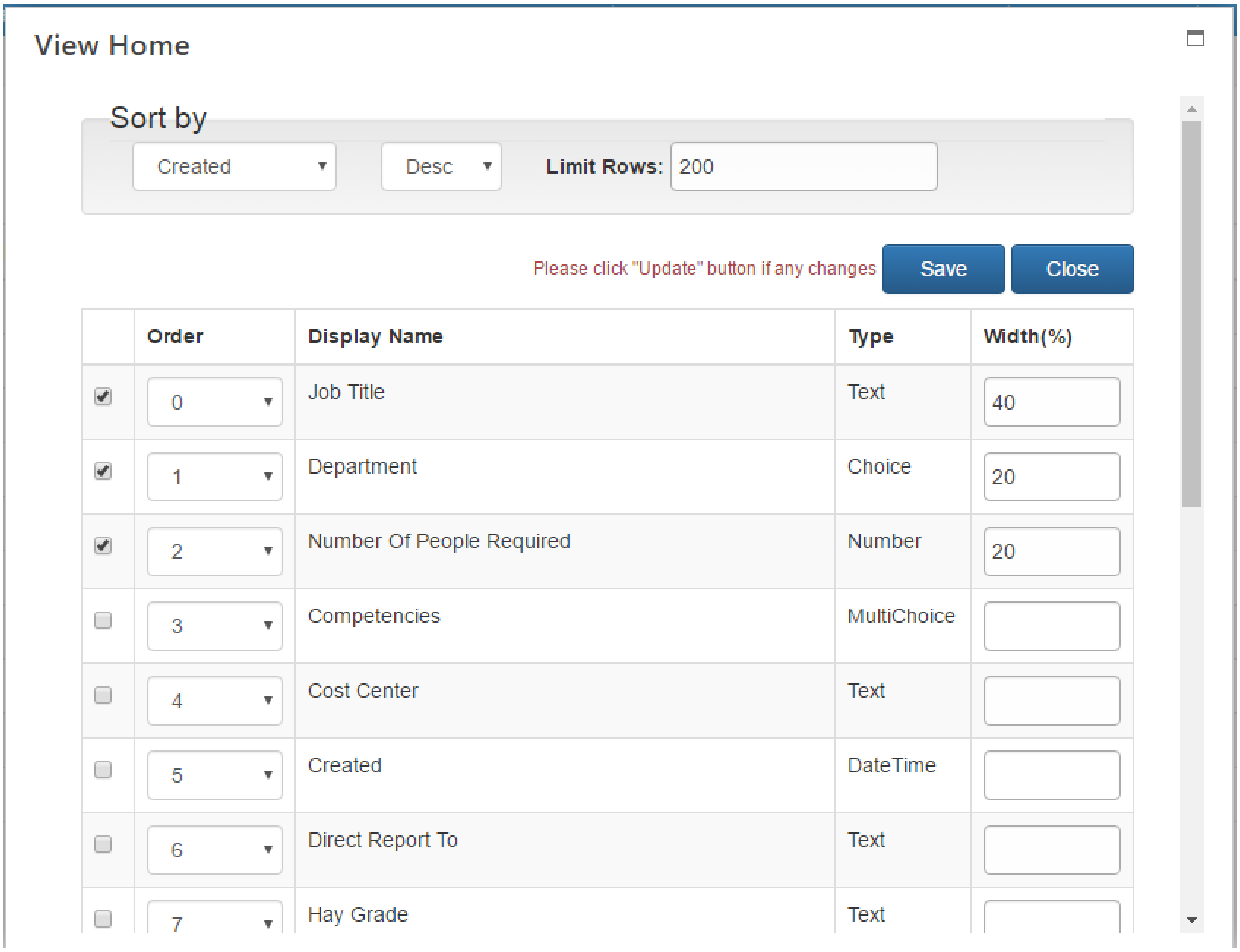
View Setting form for “My task” and “My appoval”

This form supports some types of field: Text, Number, DateTime



And Else

This form supports all types of field.

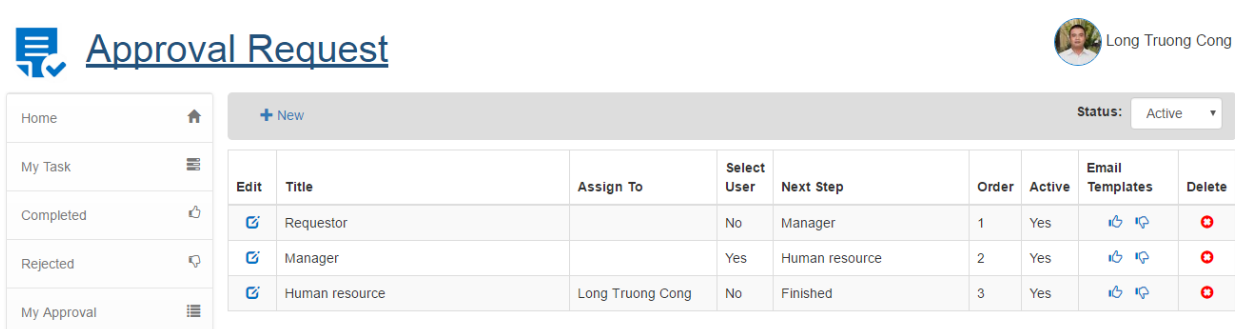


Note: Limit Rows is 0 that means unlimited

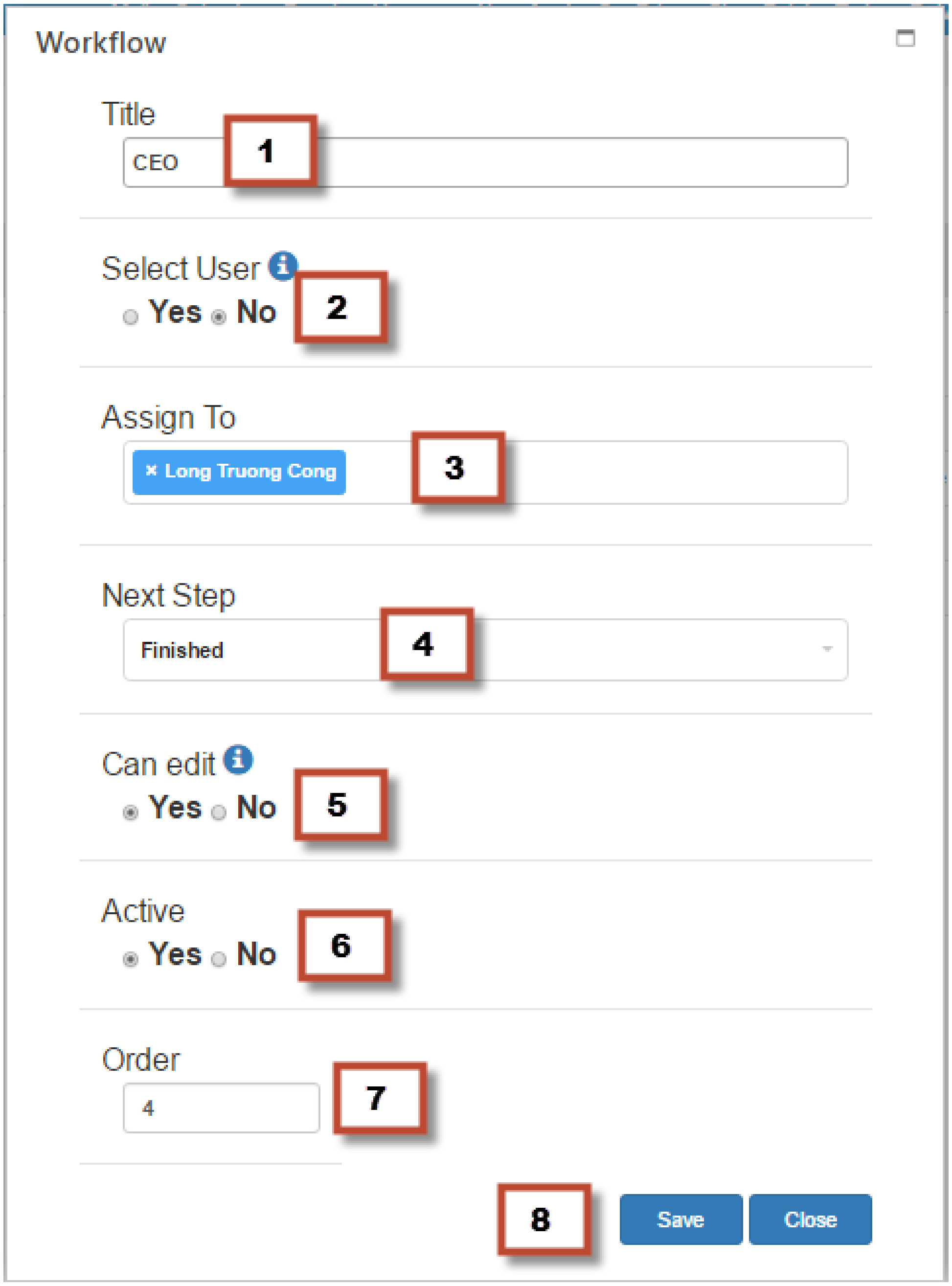
Step 5: Change workflows

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

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



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

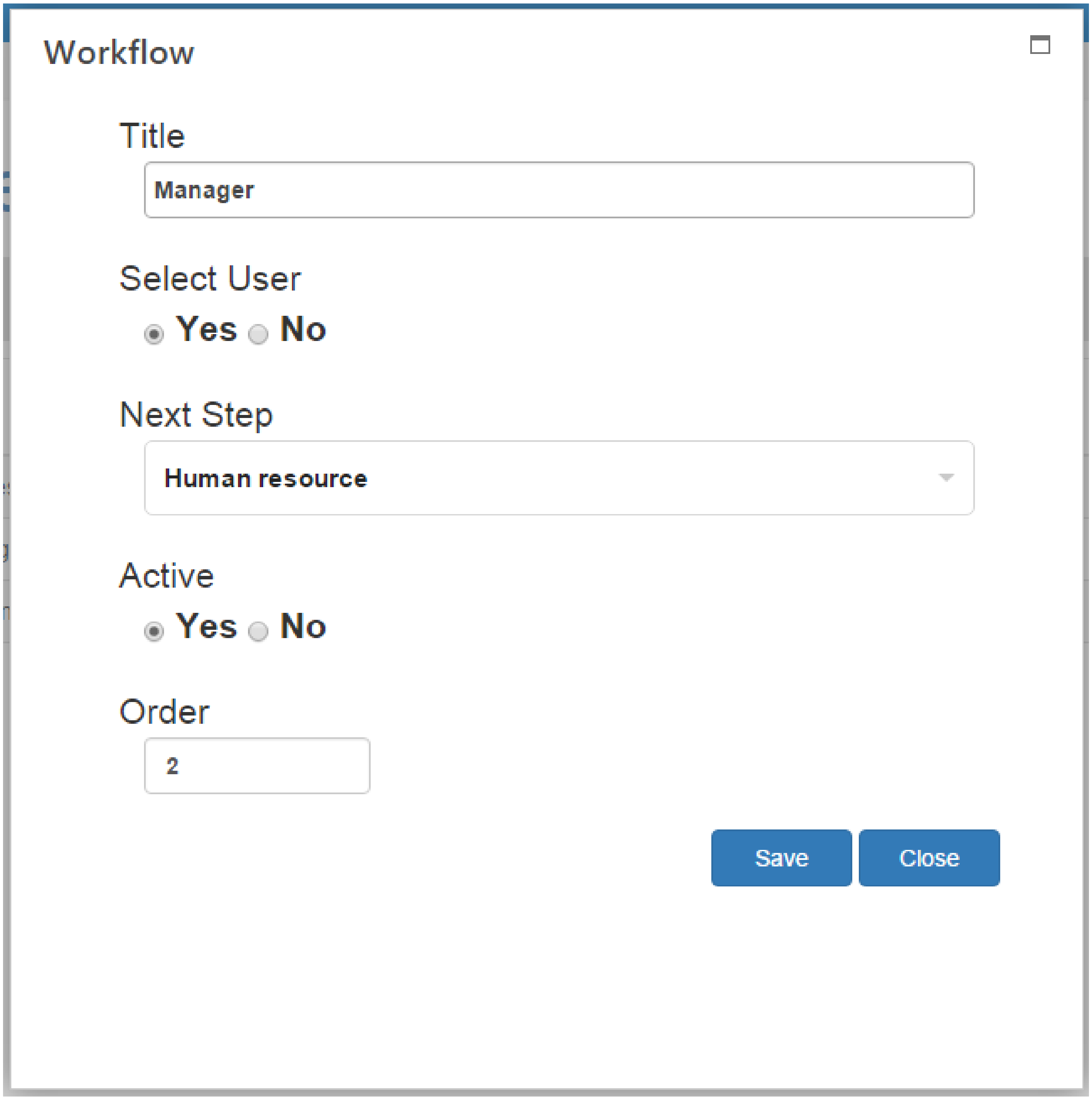


- (**1**): Name of step
- (**2**): Select User. The “Assign To” field will display in the “Request” form if you choose ‘Yes’
- (**3**): Assign To: if select user is No
- (**4**): Next Step: if this step is last step, this step is Finished
- (**5**): Can Edit: User can edit data in the “Request” form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

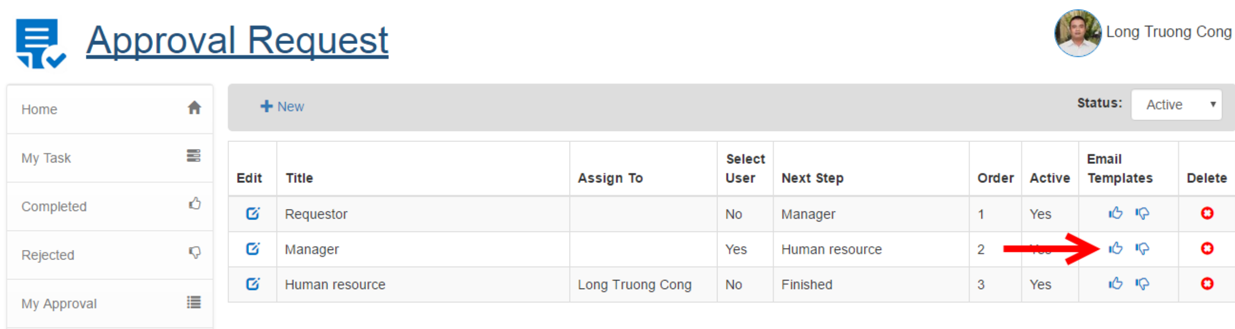
➢ Can't delete a step "Requestor" because this step is first step.

➢ Can't delete a step if this step is used

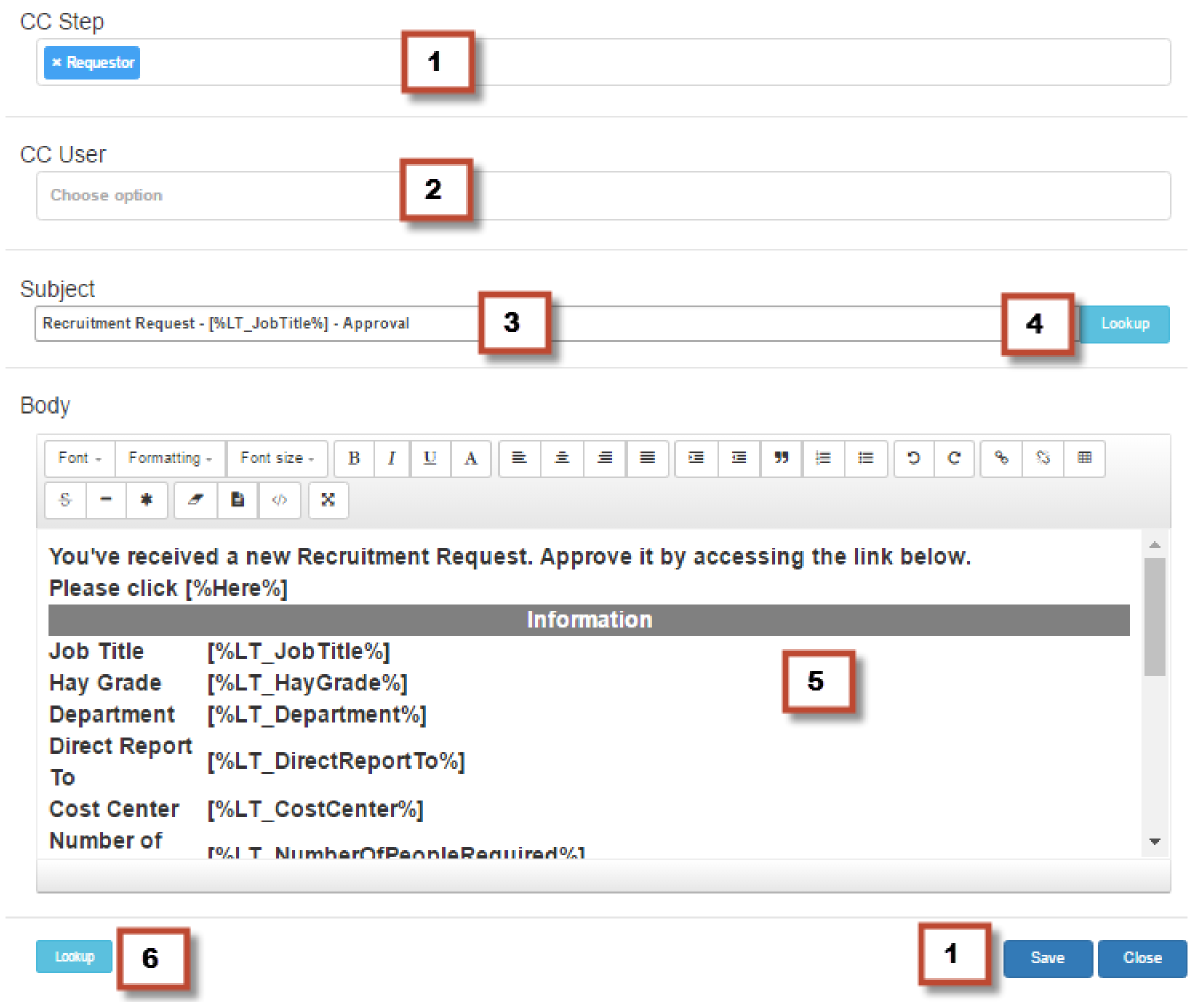
Step 6: Update Email Templates

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

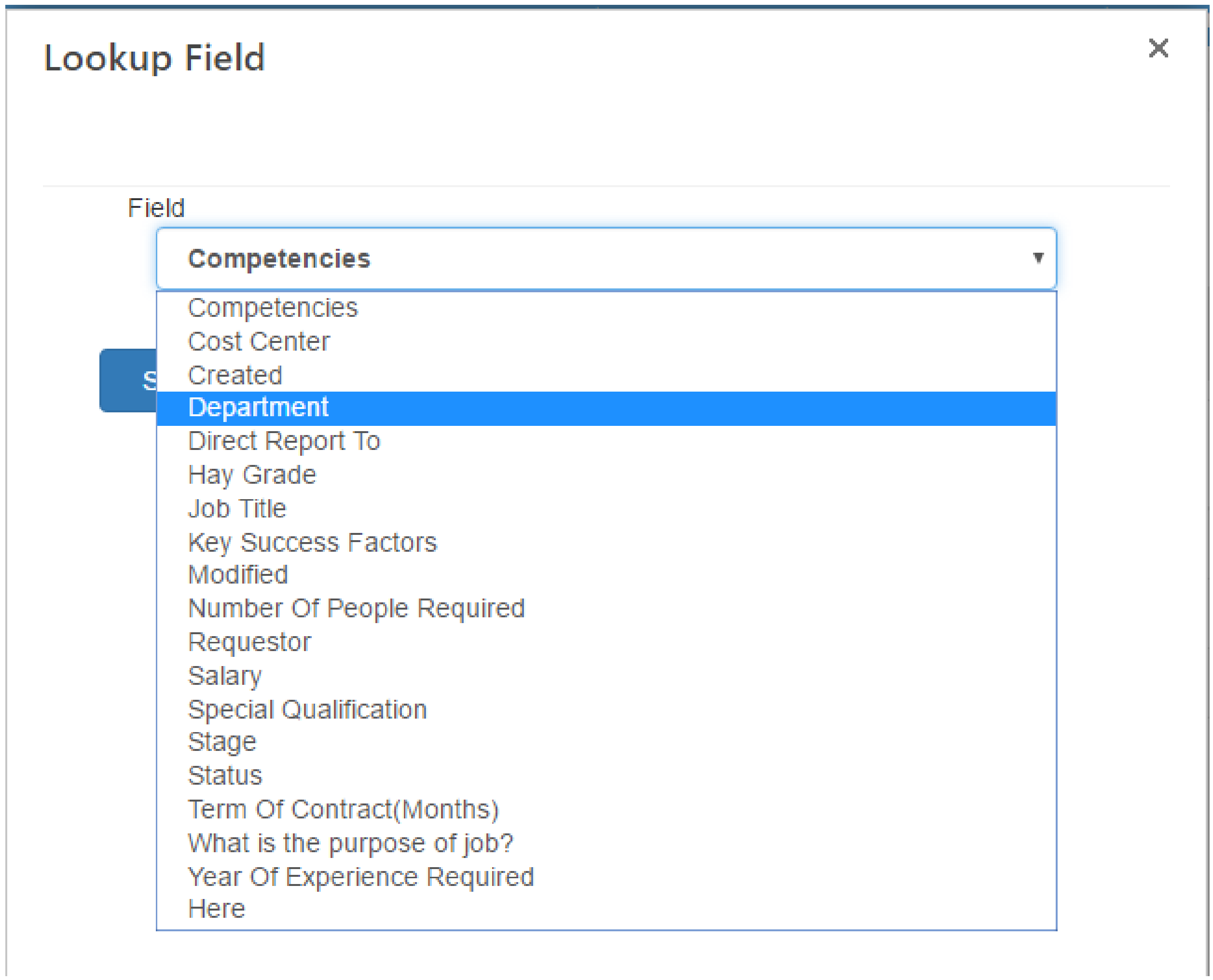


2. Edit an email template



- (**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


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