

LEAVE REQUEST

User guide – Administrator

Version 1.0

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Overview

This document helps to administrator setup the app “Leave Request Pro”. 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

Leave Request Pro

The screenshot shows the SharePoint navigation menu for 'Leave Request Pro'. The menu items are: Home, My Request, My Task, Completed, Rejected, My Approval, All Requests, Holidays, Search, Report1, Report2, Report3, Holidays Management, Customize Form, Workflows, Views Setting, and Settings. The 'Settings' item is highlighted with a red arrow. To the right of the menu, there are sections for 'SharePoint Lists' (containing Leave Request Form, Tasks, Menu, and All List Settings), 'Configurations' (containing Configurations), 'User Guide' (containing Deployment Guide), 'Supports' (containing Email: To: itapos@outlook.com.vn and Website: http://itapos.azurewebsites.net/), and 'Other SharePoint Add-Ins' (containing Flexible Request Management and Recruitment Request).

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

The screenshot shows the 'PRF Menu' list page in SharePoint. The page title is 'Recruitment Request PRF Menu'. Below the title, there is a '+ new item or edit this list' button and a search bar labeled 'Find an item'. The list contains 10 items with columns for Title, Code, URL Page, and Order By. The 'My Task' item is selected, and a context menu is open over it, showing options: Share, Edit Item, Delete Item, View Item, and Advanced. The 'Edit Item' option is highlighted.

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		/Pages/LTRejected.aspx?navpara=navrejected	4
My Approval		/Pages/LTMyApprovals.aspx?navpara=navmyapproval	5
All Requests		/Pages/LTAllRequests.aspx?navpara=navallrequest	6
Customize Form		/Pages/Administrator/ConfigForm/ConfigFormEdit.aspx?navpara=navallconfigforms	7
Workflows		/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 Permission

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



PRF Menu ?

[+ 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 ⌵	... 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 ⌵	... navallconfiaforms	/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

Share

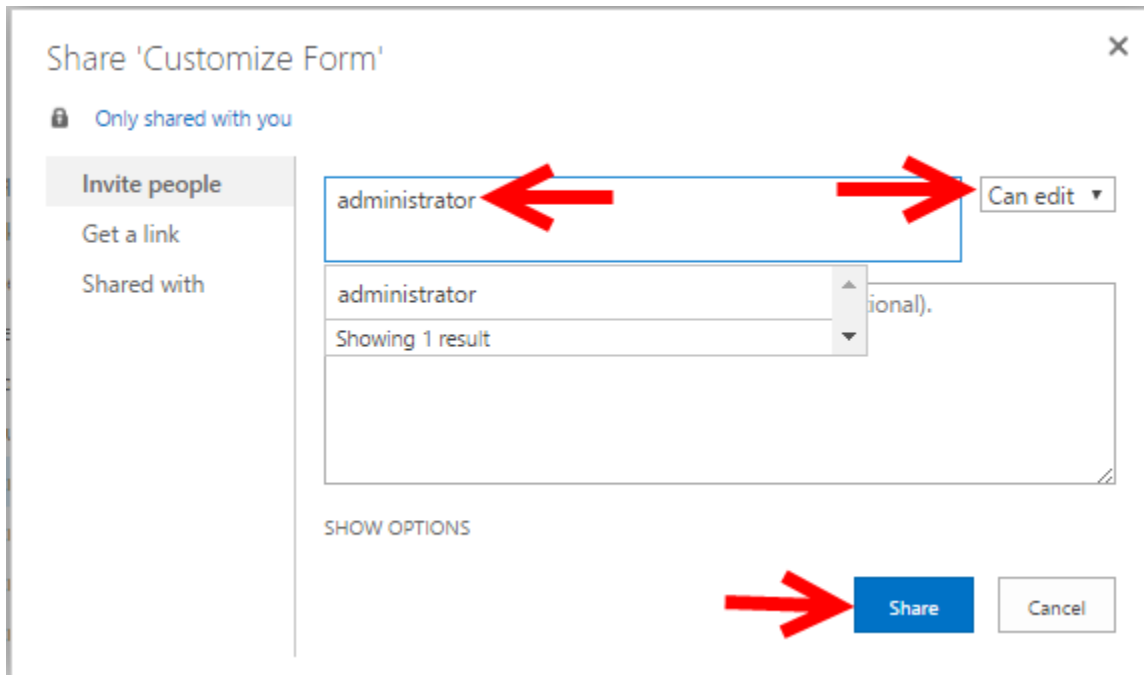
Edit Item Share

Delete Item

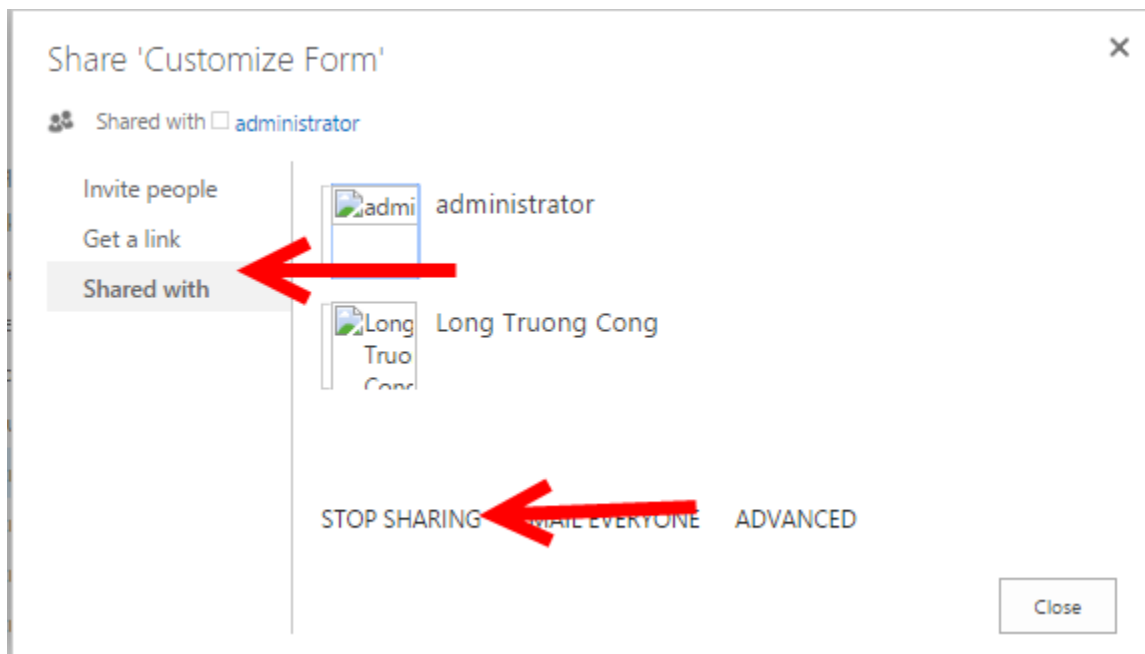
View Item

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

+ 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 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 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

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

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

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, DateTime

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: 80px;" type="text"/>
<input checked="" type="checkbox"/>	1 ▾	End Date	DateTime	<input style="width: 80px;" type="text"/>
<input checked="" type="checkbox"/>	2 ▾	Number Day off	Number	<input style="width: 80px;" type="text"/>
<input type="checkbox"/>	3 ▾	Created	DateTime	<input style="width: 80px;" type="text"/>
<input type="checkbox"/>	4 ▾	Modified	DateTime	<input style="width: 80px;" type="text"/>

Please click "Update" button if any changes

Save Change
Close

And Else

This form supports all types of field.

View All Requests □

Sort by

Start Date ▾ Asc ▾ Limit Rows: 200

Please click "Update" button if any changes Save Close

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

Note: Limit Rows is 0 that means 5000 items

Step 5: Change workflows

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

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

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

Workflow

Title
CEO **1**

Select User **i**
 Yes No **2**

Assign To
 3

Next Step
Finished **4**

Can edit **i**
 Yes No **5**

Active
 Yes No **6**

Order
4 **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

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

+ 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