OVERTIME REQUEST

User guide – Administrator

Version 1.0

MENU

Overview

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

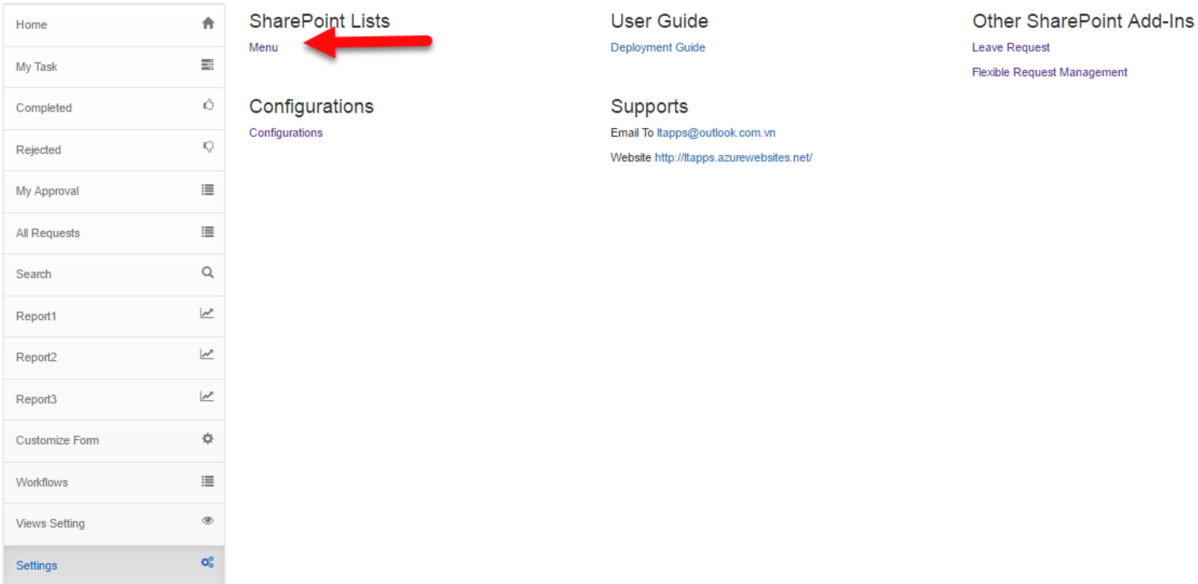
Step 1: Install the app to site

Step 2: Customize Left Menu

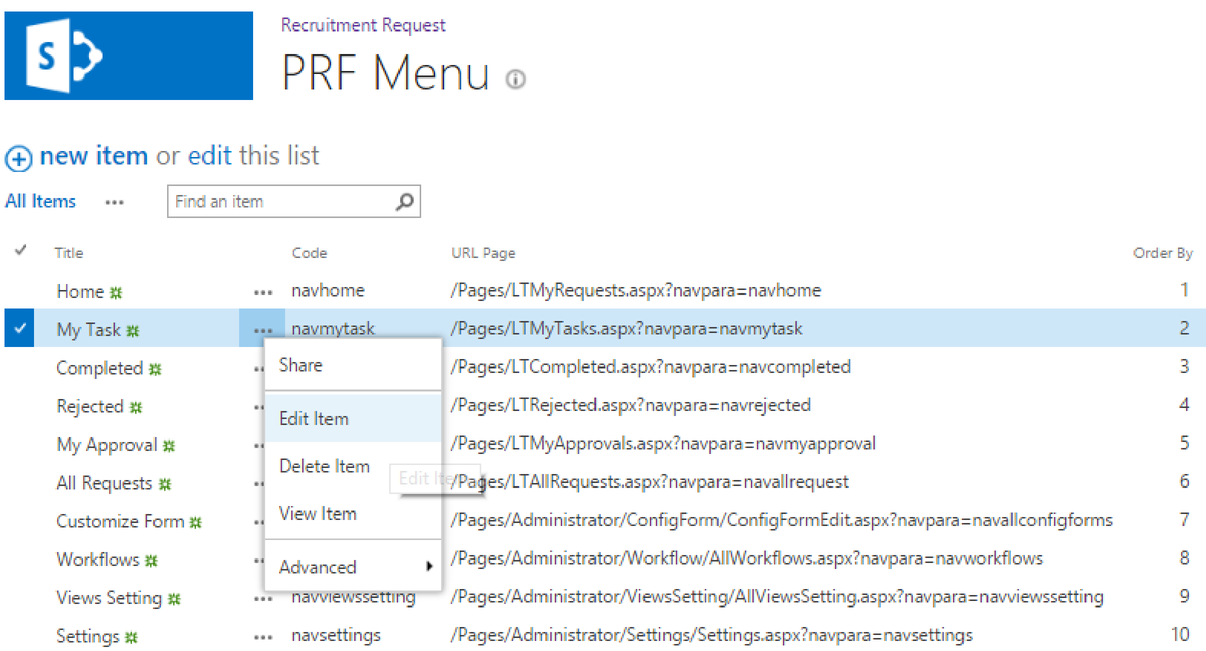
This step allows administrator to customize the left menu for consistent an organization. The administrator can reorder items in left menu and share permission for each item of left menu.

Edit Item

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

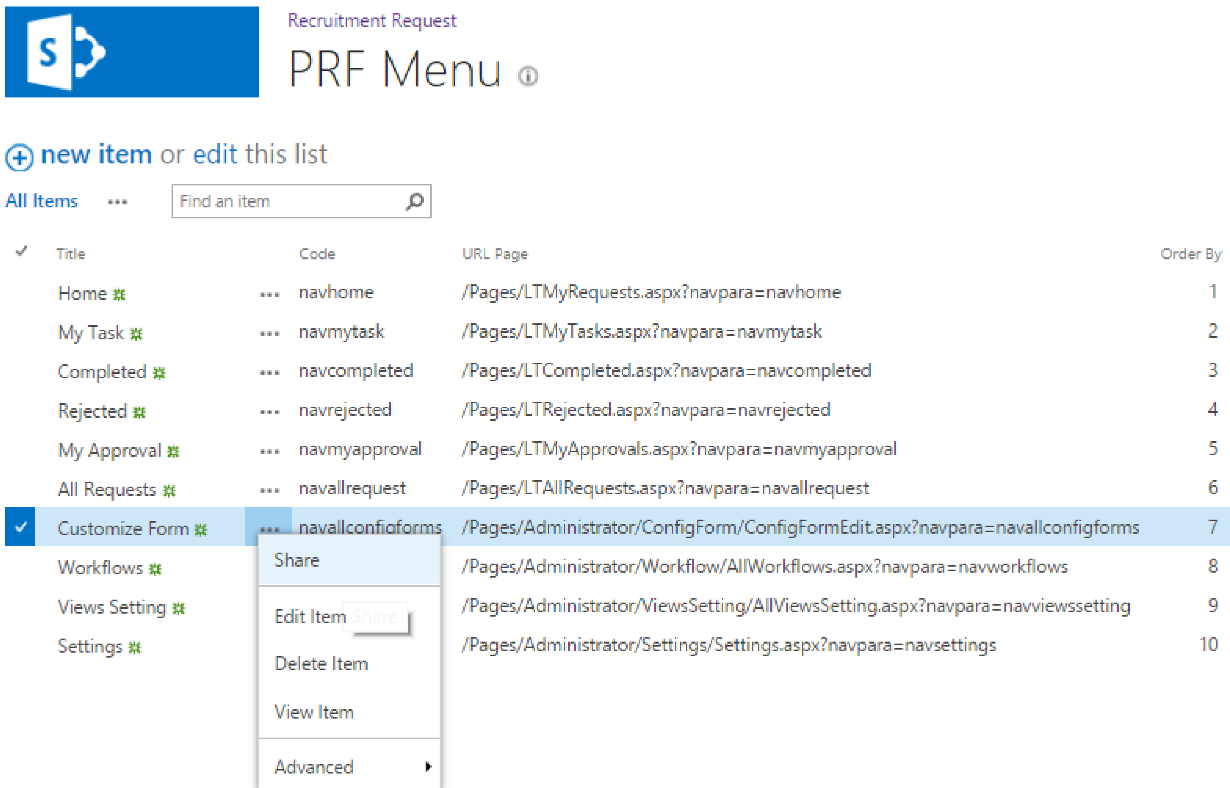


In **PRF Menu** List page, the administrator can edit any items if he wants.

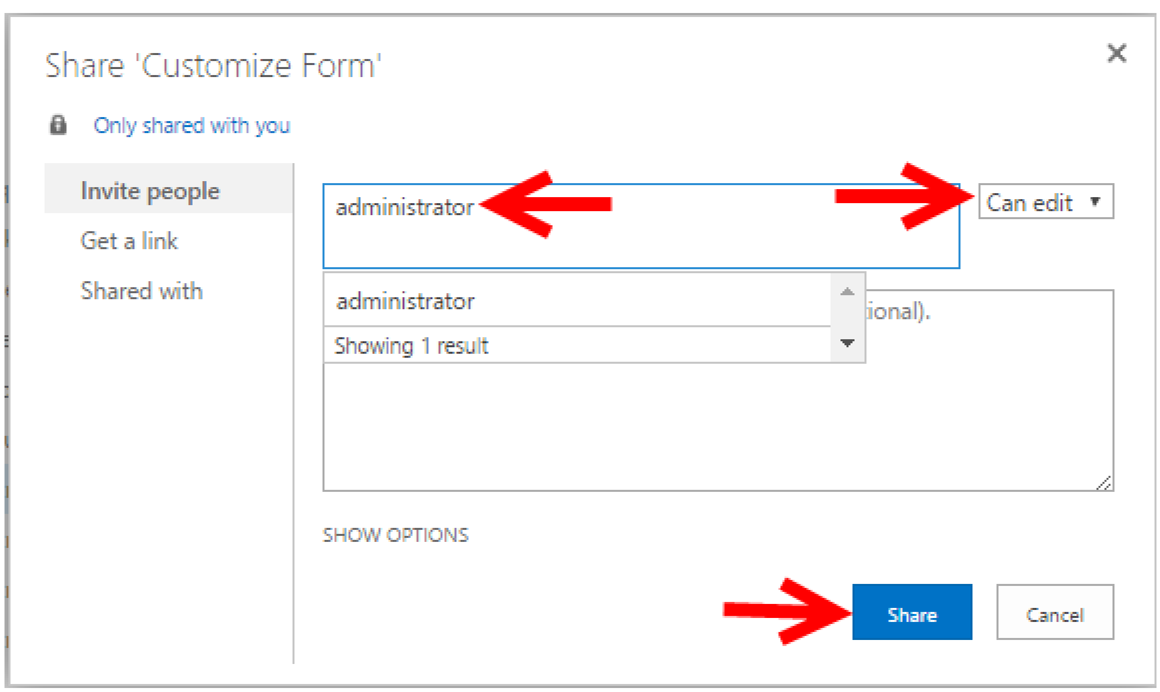


Share Permission

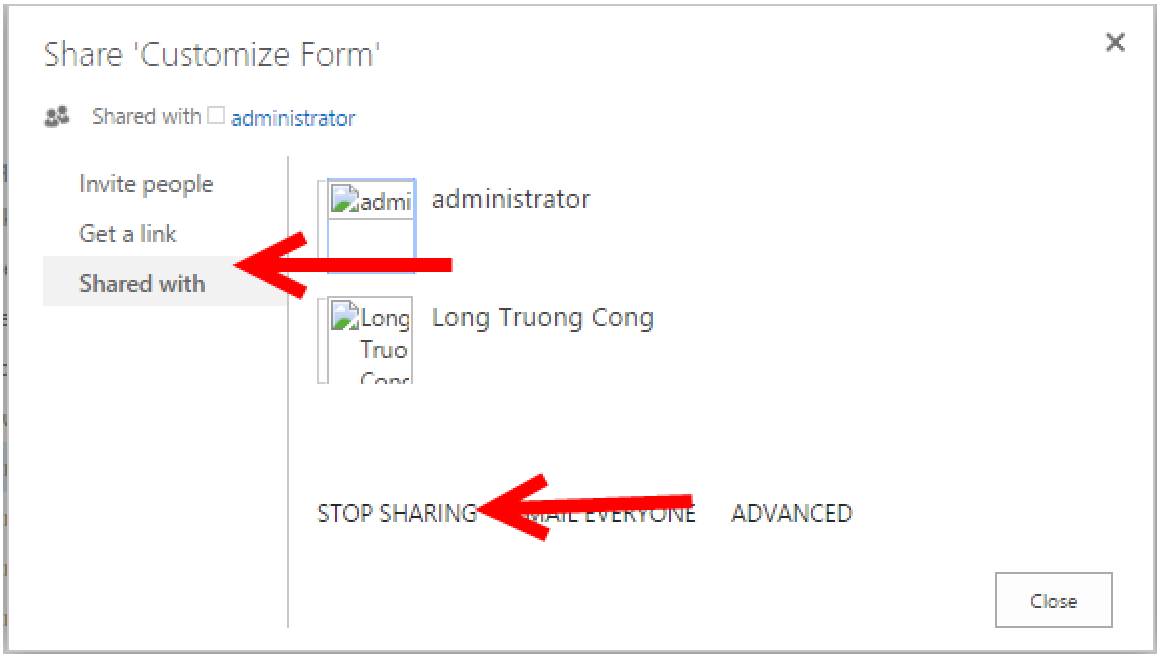
In **PRF Menu** List page, Click **Share** in context menu



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

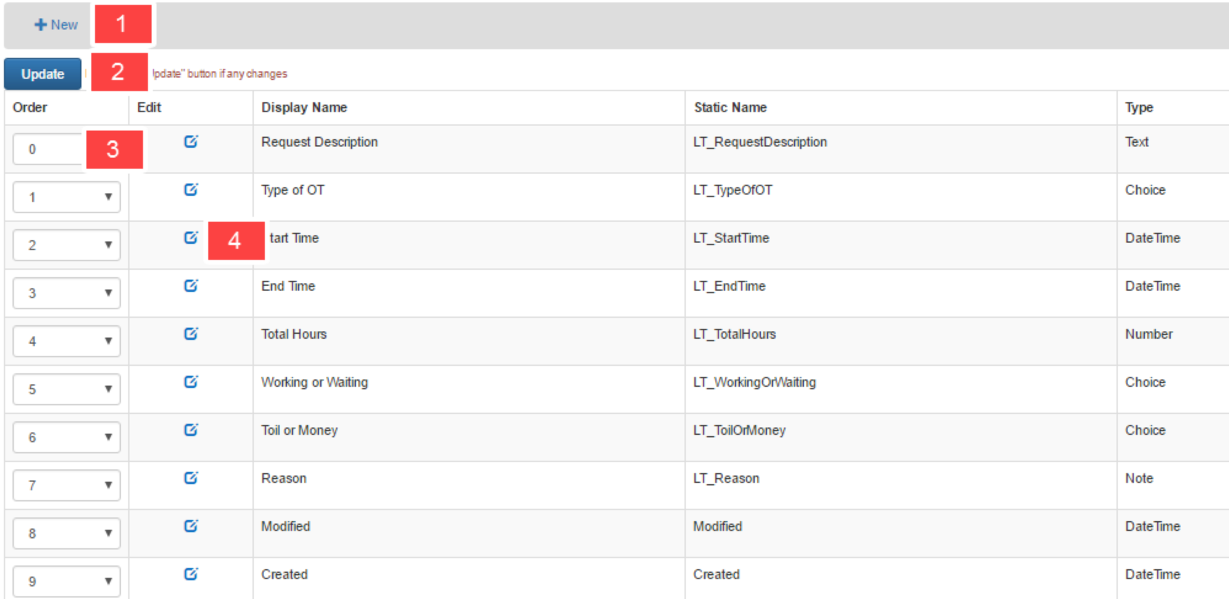
This step allows administrator to customize the form for consistent an organization. The administrator can add, edit, delete any field that he wants. This tool supports many types of [SharePoint Field]

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

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

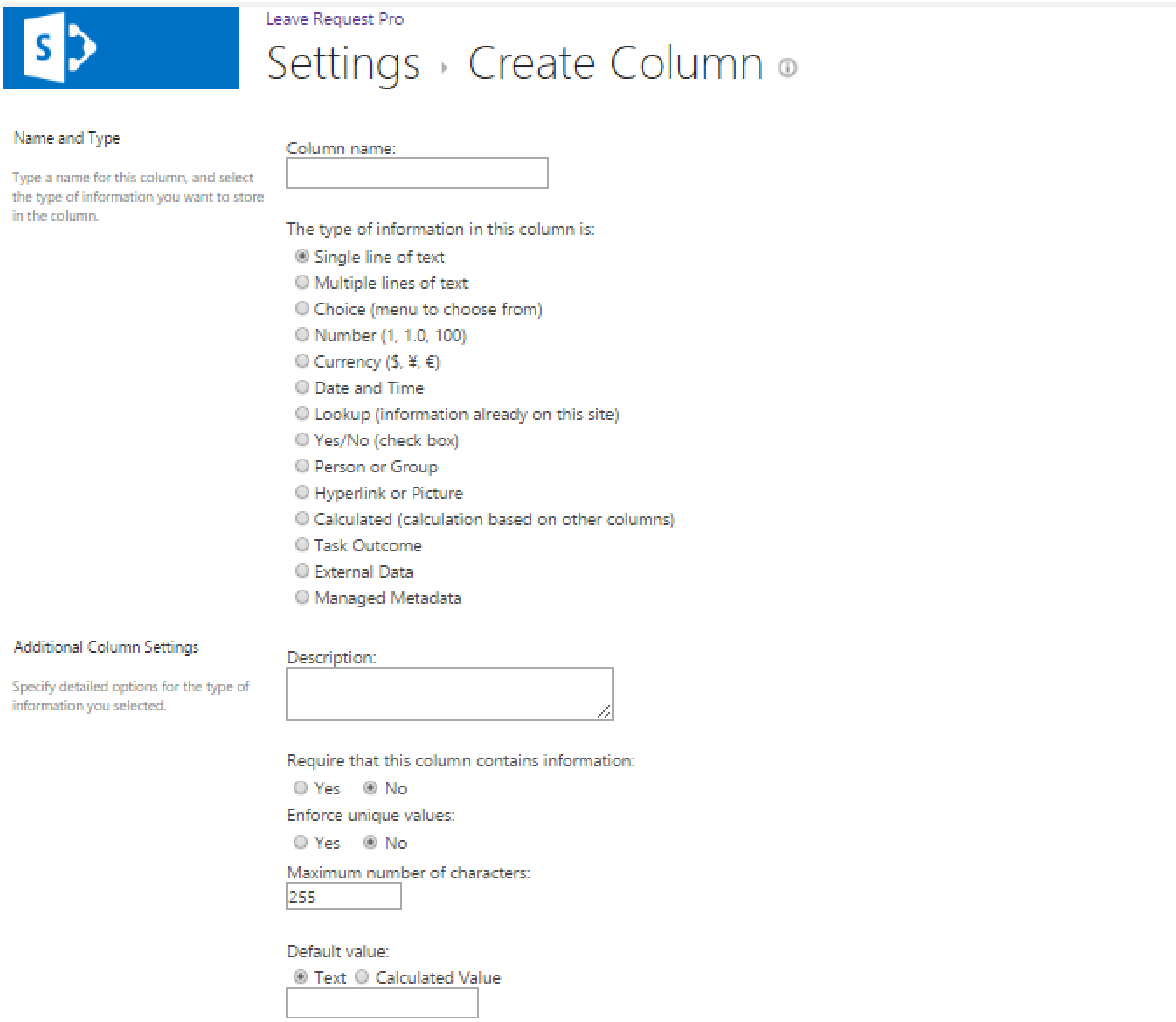


Order	Edit	Display Name	Static Name	Type
0		Request Description	LT_RequestDescription	Text
1		Type of OT	LT_TypeOfOT	Choice
2		tart Time	LT_StartTime	DateTime
3		End Time	LT_EndTime	DateTime
4		Total Hours	LT_TotalHours	Number
5		Working or Waiting	LT_WorkingOrWaiting	Choice
6		Toil or Money	LT_ToilOrMoney	Choice
7		Reason	LT_Reason	Note
8		Modified	Modified	DateTime
9		Created	Created	DateTime

- (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.



Leave Request Pro

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:

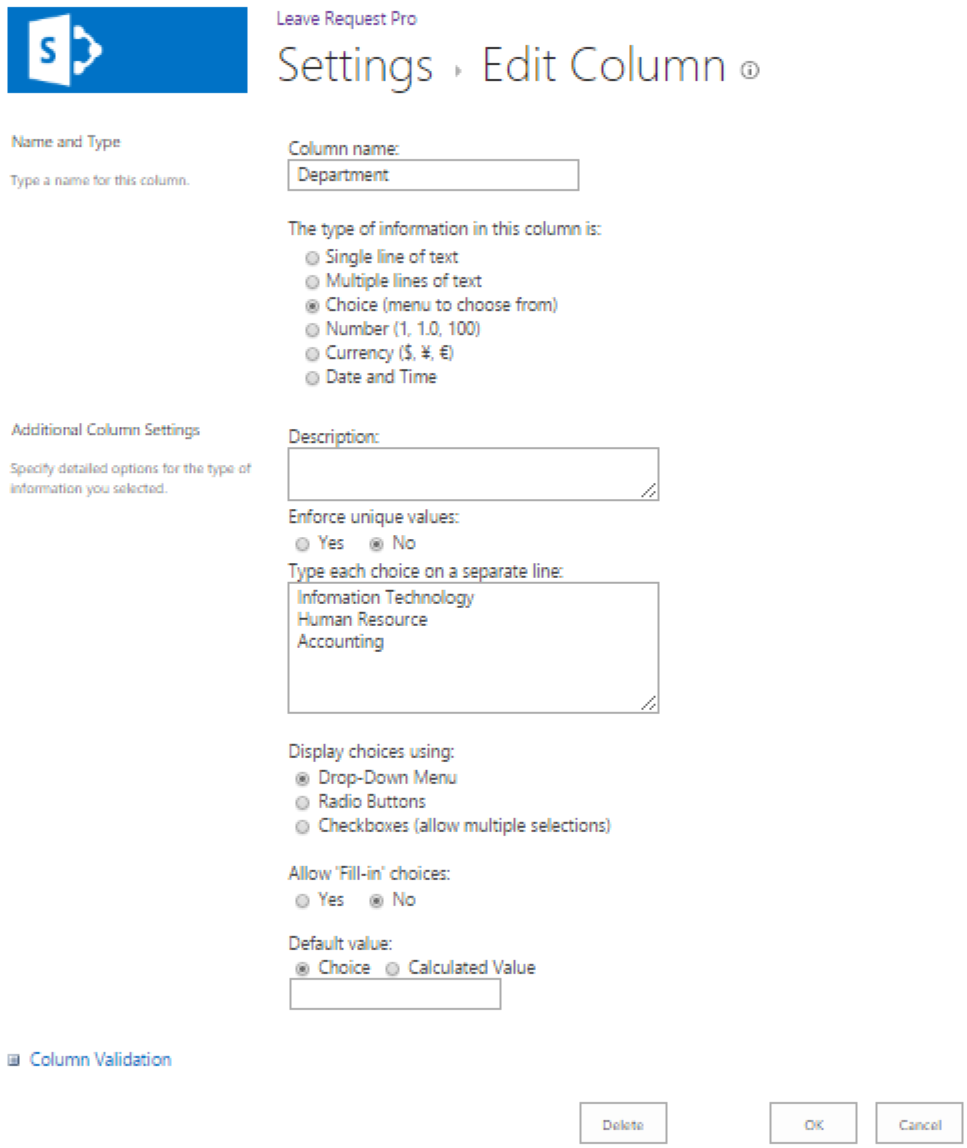
255

Default value:

Text Calculated Value

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.

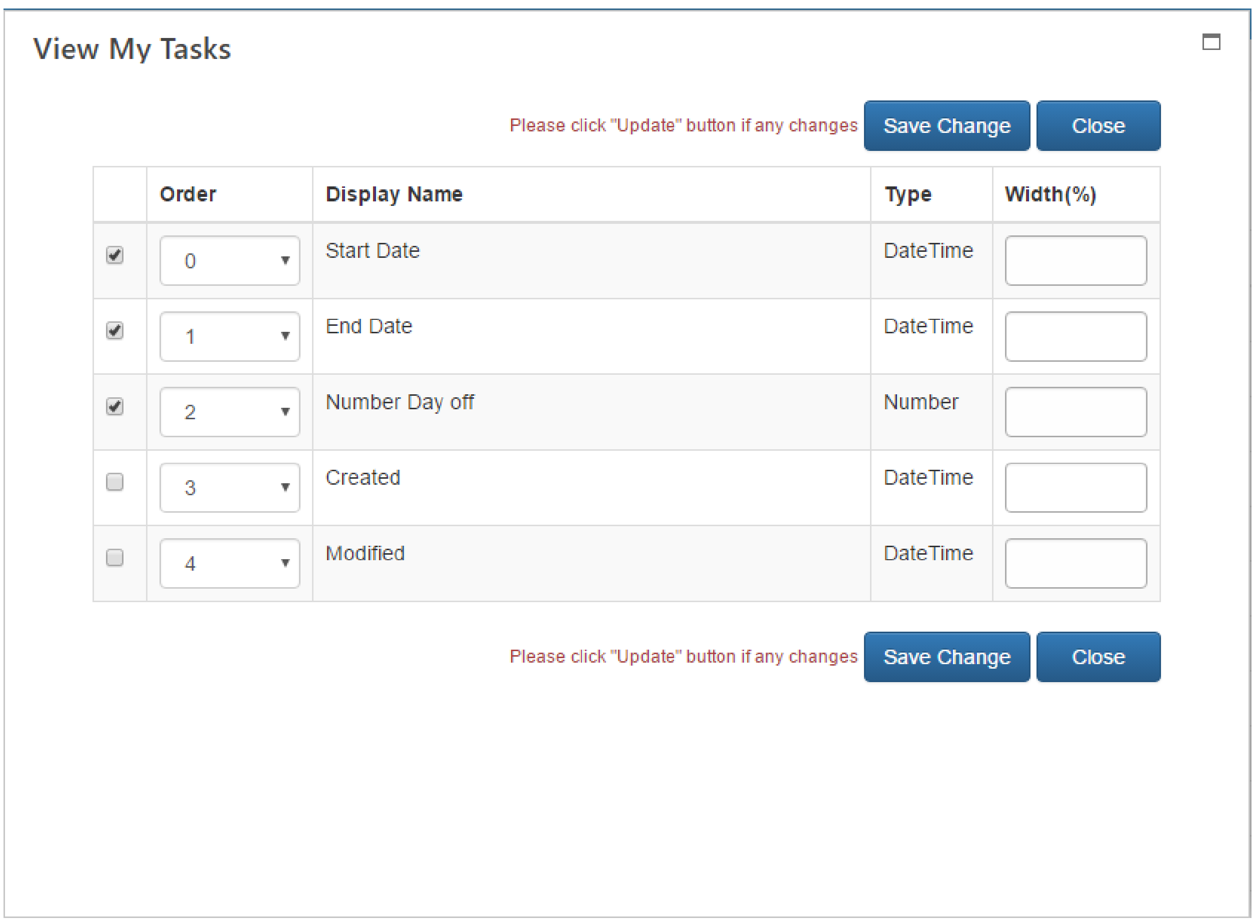
2 types of view setting form

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

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 appoval"

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



View My Tasks

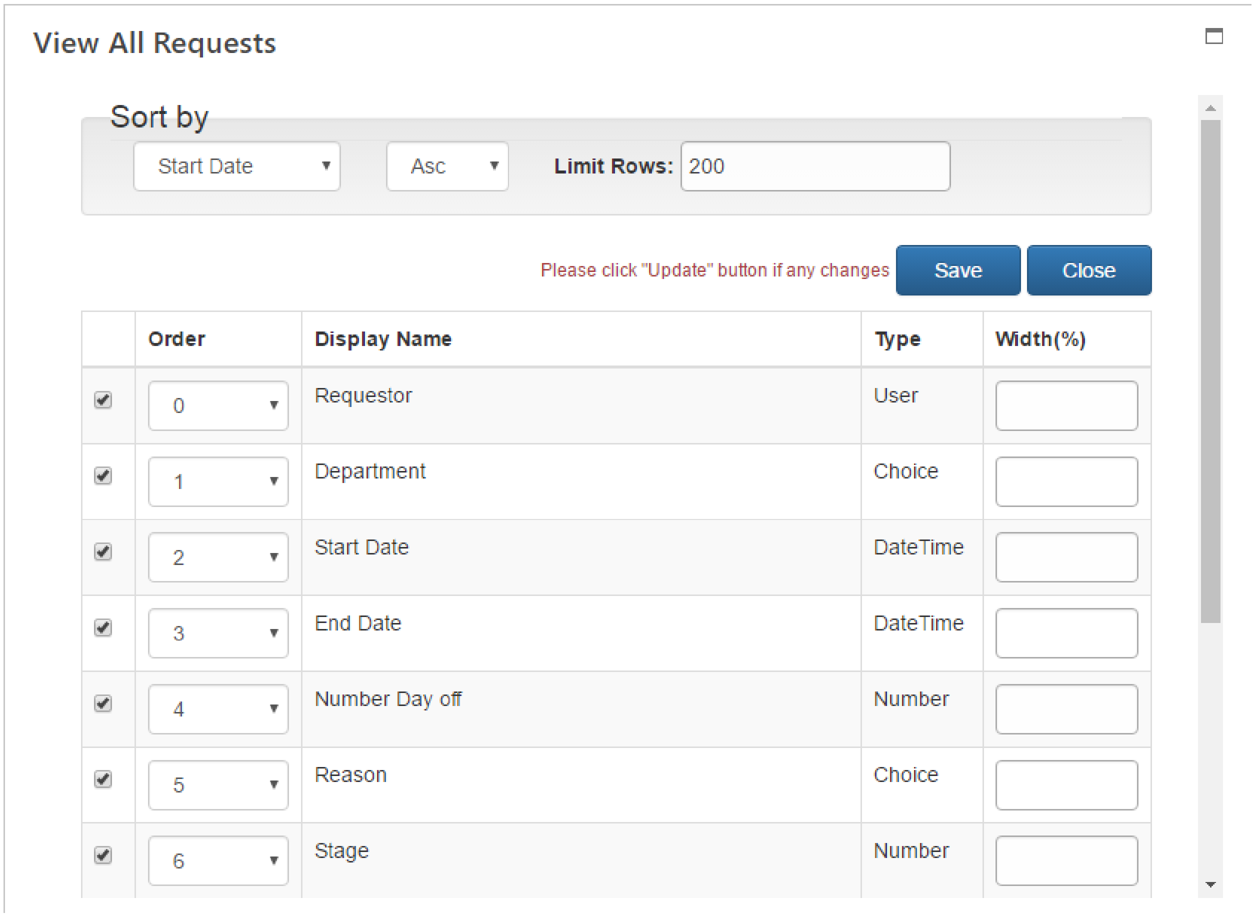
Please click "Update" button if any changes Save Change Close

	Order	Display Name	Type	Width(%)
☑	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

And Else

This form supports all types of field.



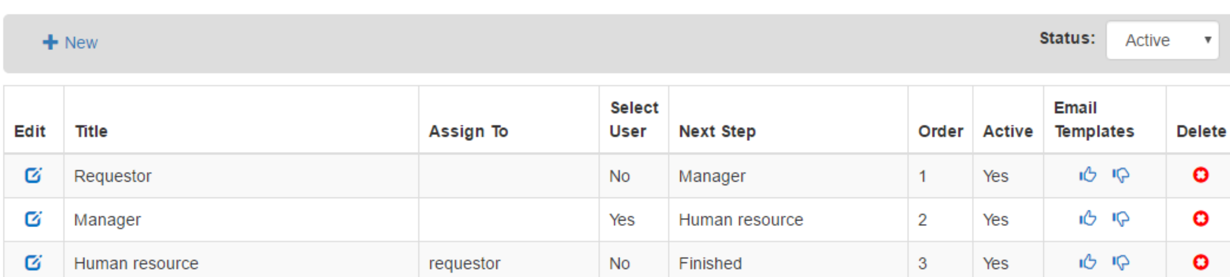
	Order	Display Name	Type	Width(%)
✔	0	Requestor	User	
✔	1	Department	Choice	
✔	2	Start Date	DateTime	
✔	3	End Date	DateTime	
✔	4	Number Day off	Number	
✔	5	Reason	Choice	
✔	6	Stage	Number	

Note: Limit Rows is 0 that means 5000 items

Step 5: Change workflows

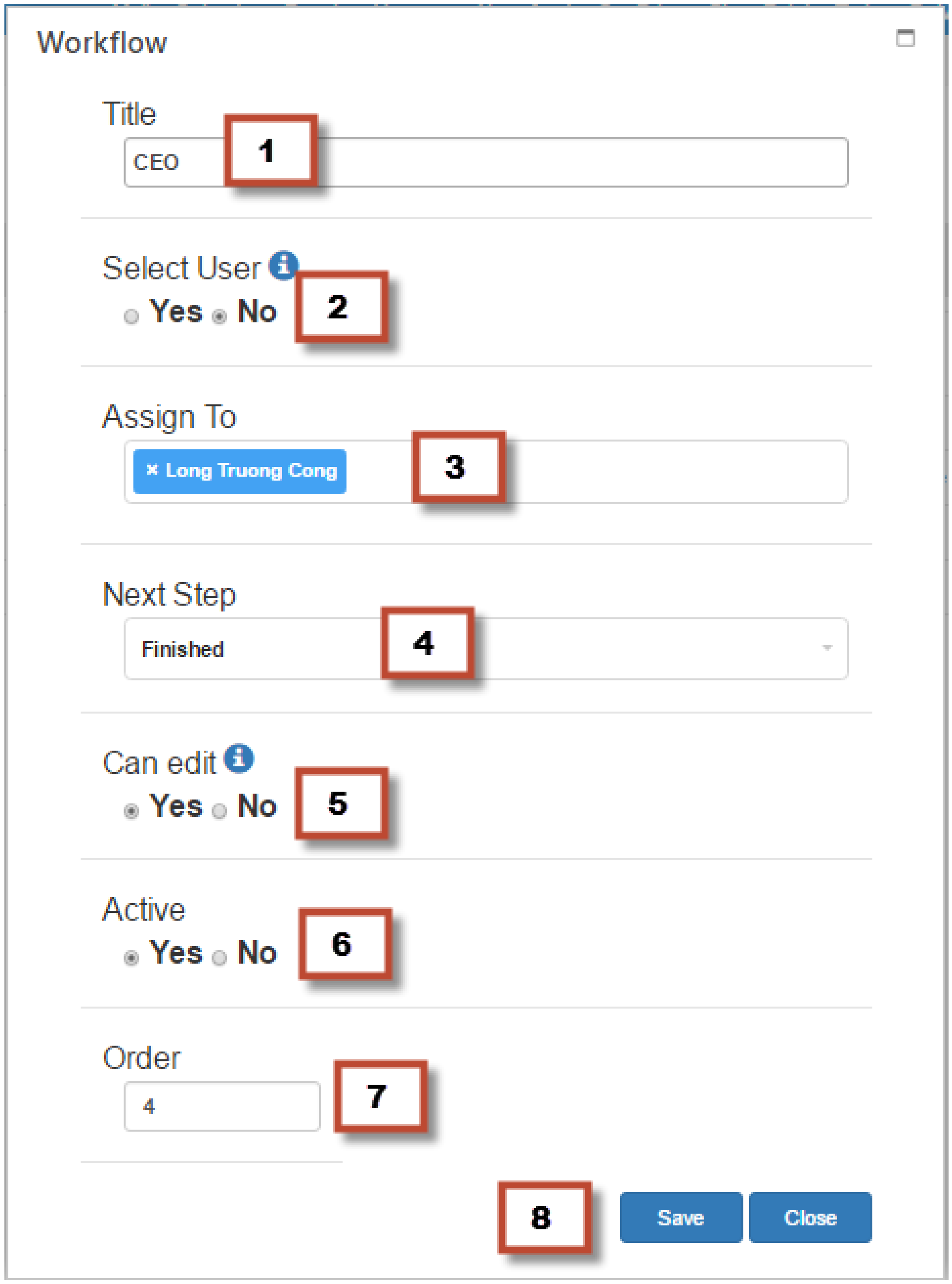
This step allows administrator to change the Workflow for consistent an organization.

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



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**



- (**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.

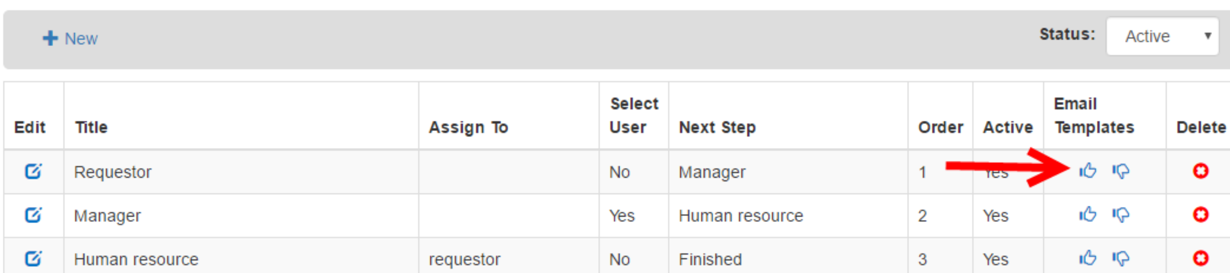
   Note

   - 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.

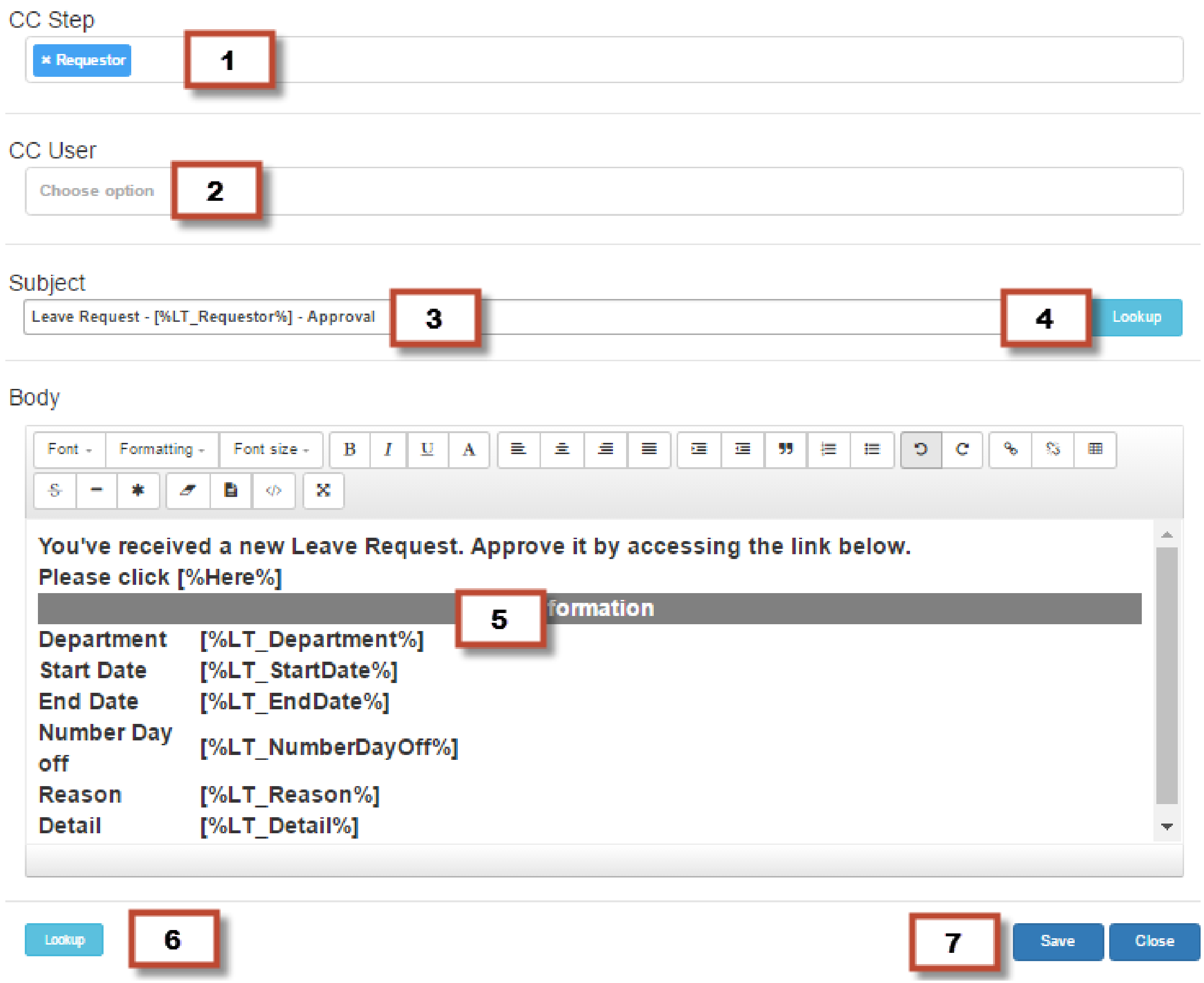
1. In left menu, click **Workflows.** Click **hand icon** to update an email template. **Hand up** is approval, **hand down** is reject



+ 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



- (**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