

# RECRUITMENT REQUEST

User guide – Administrator

Version 1.0

## MENU

Overview .....	3
Step 1: Install the app to site .....	3
Step 2: Customize Left Menu .....	3
Step 3: Customize Form .....	7
Step 4: Views Setting.....	9
Step 5: Change workflows .....	12
Step 6: Update Email Templates .....	16

## Overview

This document helps to administrator setup the app “Recruitment 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



# Recruitment Request

Home	🏠
My Task	☰
Completed	👍
Rejected	👎
My Approval	☰
All Requests	☰
Customize Form	⚙️
Workflows	☰
Views Setting	👁️
Settings	⚙️

## SharePoint Lists

Recruitment Request

Tasks

Menu

Workflows

Email Templates

All List Settings



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 Permission

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

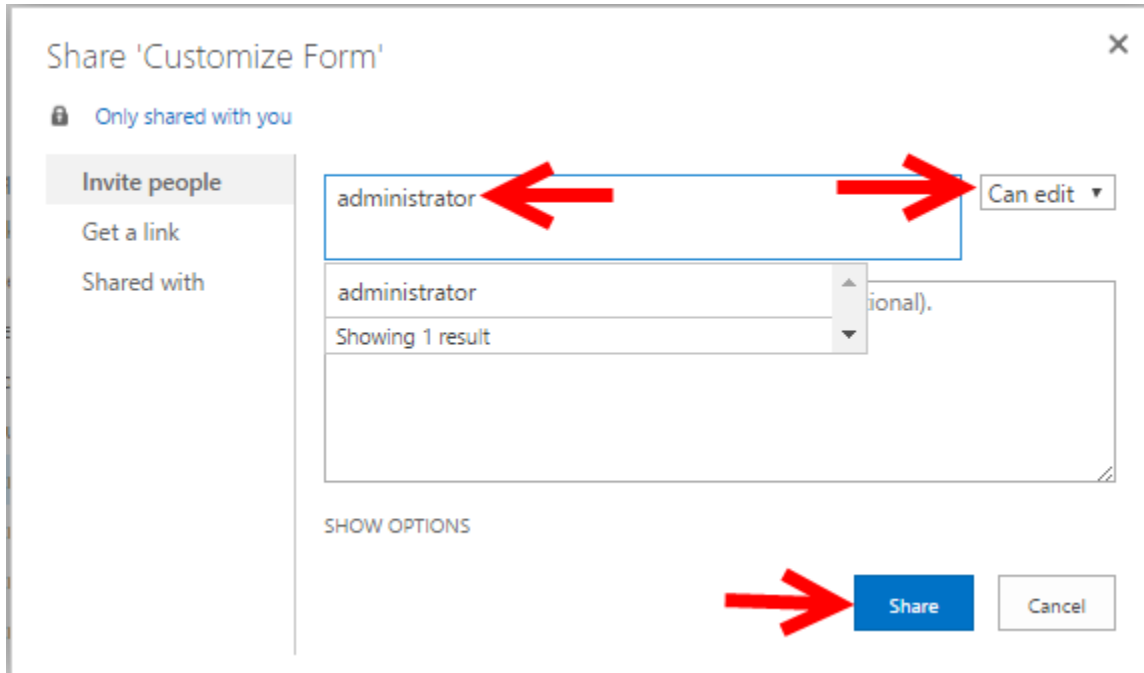


+ new item or edit this list

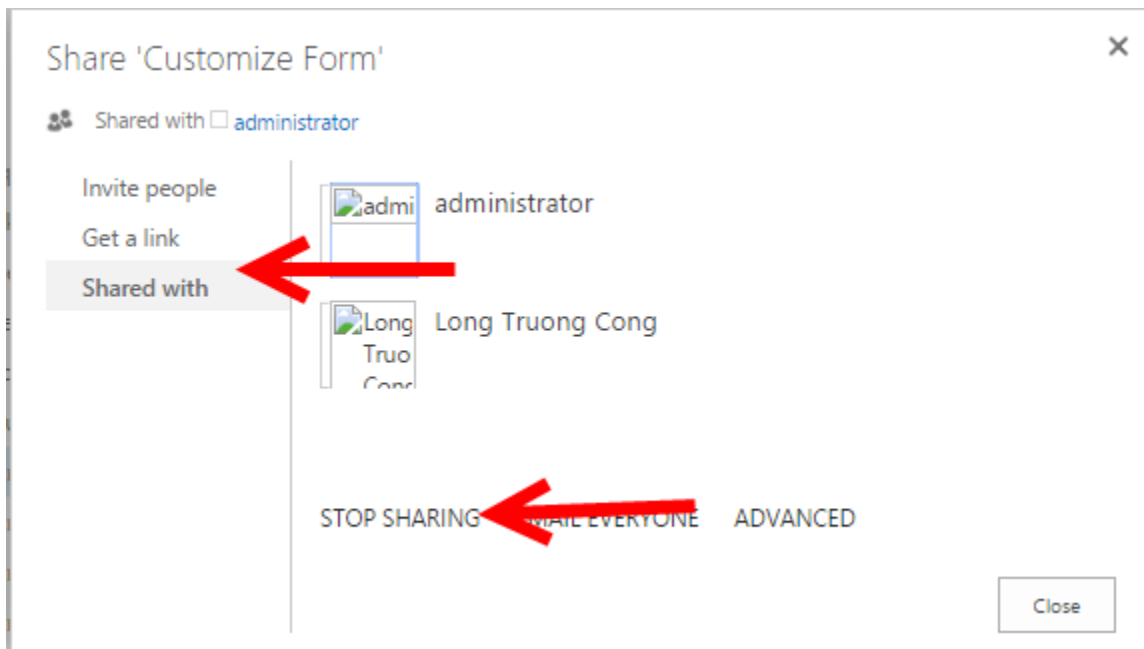
All Items ... Find an item 🔍

✓ 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

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](#)

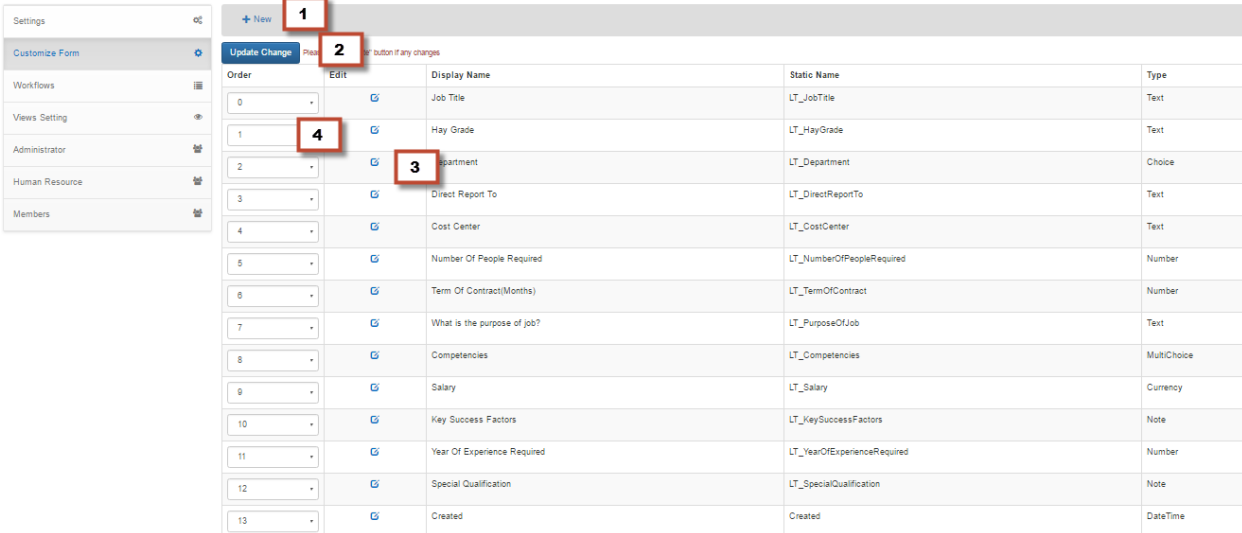
Type of field supports:

- 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

 Recruitment Request

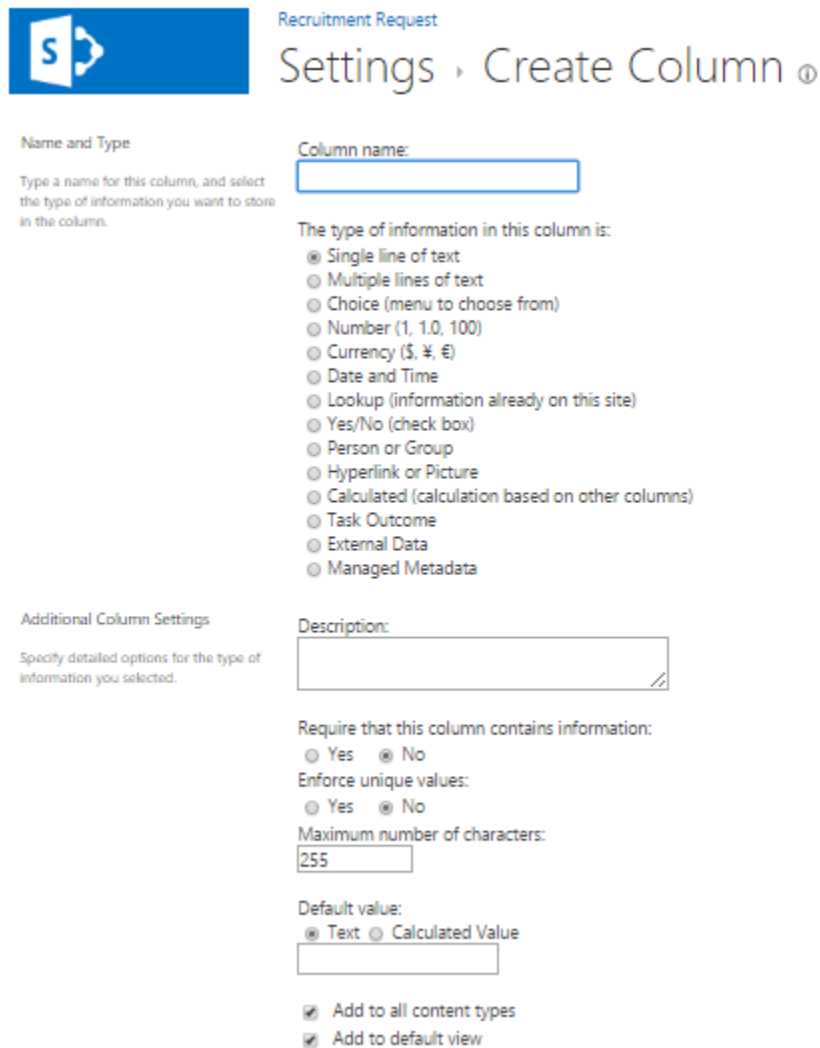


Order	Display Name	Static Name	Type
0	Job Title	LT_JobTitle	Text
1	Hay Grade	LT_HayGrade	Text
2	Department	LT_Department	Choice
3	Direct Report To	LT_DirectReponTo	Text
4	Cost Center	LT_CostCenter	Text
5	Number Of People Required	LT_NumberOfPeopleRequired	Number
6	Term Of Contract(Months)	LT_TermOfContract	Number
7	What is the purpose of job?	LT_PurposeOfJob	Text
8	Competencies	LT_Competencies	MultiChoice
9	Salary	LT_Salary	Currency
10	Key Success Factors	LT_KeySuccessFactors	Note
11	Year Of Experience Required	LT_YearOfExperienceRequired	Number
12	Special Qualification	LT_SpecialQualification	Note
13	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.



The screenshot shows the 'Create Column' configuration page in SharePoint. At the top left is the SharePoint logo. The page title is 'Recruitment Request' followed by 'Settings > Create Column'. The form is divided into two main sections: 'Name and Type' and 'Additional Column Settings'. In the 'Name and Type' section, there is a text box for 'Column name:' and a list of column types with radio buttons. The 'Additional Column Settings' section includes a 'Description:' text box, 'Require that this column contains information:' (Yes/No), 'Enforce unique values:' (Yes/No), 'Maximum number of characters:' (text box with '255'), 'Default value:' (Text/Calculated Value), and two checked checkboxes: 'Add to all content types' and 'Add to default view'.

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



# Recruitment Request

Settings	
Customize Form	
Workflows	
<b>Views Setting</b>	
Administrator	
Human Resource	
Members	

Edit	View Name
	Home
	My Tasks
	Completed
	Rejected
	My Approvals
	All Requests

## **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	

Please click "Update" button if any changes

Save Change

Close

## 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	
<input type="checkbox"/>	8	Key Success Factors	Note	
<input type="checkbox"/>	9	Modified	DateTime	


**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**


# Recruitment Request


Settings 


Customize Form 

**Workflows** 


Views Setting 

















Administrator 

Human Resource 

Members 

[+ 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	hr1; hr2	No	CEO	3	Yes	 	
	CEO	ceo1	No	Finished	4	Yes	 	

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

**Workflow**

Title  **1**

---

Select User <sup>i</sup>  
 Yes  No **2**

---

Assign To  
 **3**

---

Next Step  
 **4**

---

Can edit <sup>i</sup>  
 Yes  No **5**

---

Active  
 Yes  No **6**

---

Order  
 **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

### Workflow

Title

Select User  
 Yes  No

Next Step

Active  
 Yes  No

Order

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

### Recruitment Request

Settings		<a href="#">+ New</a>							Status: Active 	
Customize Form		<b>Edit</b>	<b>Title</b>	<b>Assign To</b>	<b>Select User</b>	<b>Next Step</b>	<b>Order</b>	<b>Active</b>	<b>Email Templates</b>	<b>Delete</b>
<b>Workflows</b>			Requestor		No	Manager	1	Yes 	 	
Views Setting			Manager		Yes	Human resource	2	Yes	 	
Administrator			Human resource	hr1; hr2	No	CEO	3	Yes	 	
Human Resource			CEO	ceo1	No	Finished	4	Yes	 	
Members										

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] [Print] [Fullscreen]

\$ - \* [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