

LEAVE REQUEST

User guide – Administrator

Version 1.0

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Overview

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

1. Install the app to site
2. Create the SharePoint groups
3. Add users to the group
4. Change permission to SharePoint lists of app. This step assign permission to SharePoint List that make sure users always have permissions.
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.

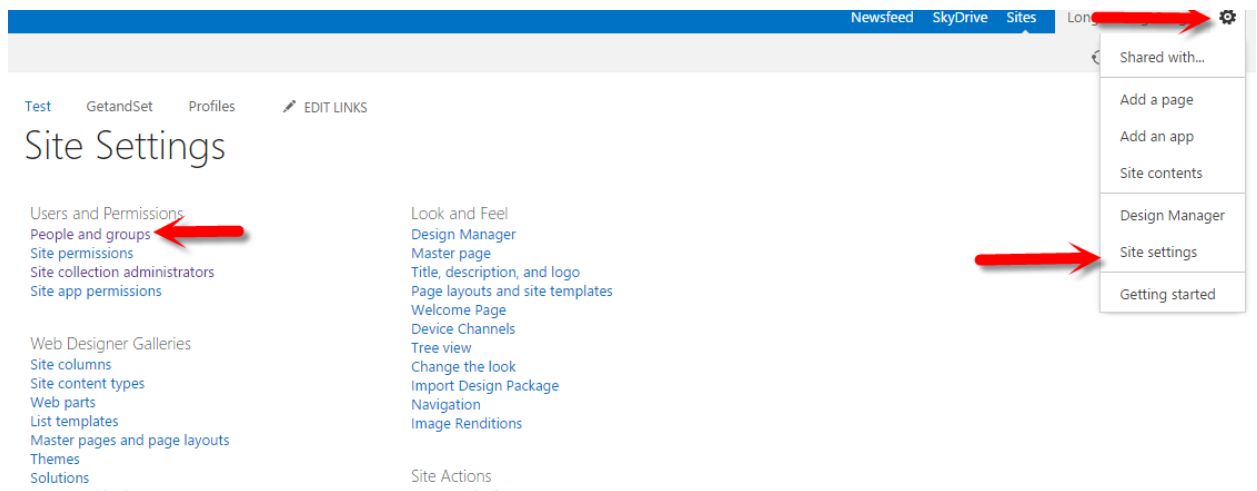
Step 1: Install the app to site

Step 2: Create the SharePoint group

This step create SharePoint Groups

. **AFLAdministrators**: This group is administrator group

1. Open your site. Then click **Setting -> Site Settings -> People and groups**



2. Click **More**

Groups

Test Members

Excel Services
Viewers

Test Visitors

Test Owners

Style Resource
Readers

Designers

Hierarchy Managers

Approvers

Restricted Readers

Quick Deploy Users

AFLAdministrators

AFLHumanResource

AFLMembers

More...



3. Click **New** -> **New Group**. Then input the information like below

Name and About Me Description

Type a name and description for the group.

Name:

About Me:

[Click for help about adding HTML formatting.](#)

Owner

The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:

Group Settings

Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?

Group Members

Everyone

Who can edit the membership of the group?

Group Owner

Group Members

Membership Requests

Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.

Allow requests to join/leave this group?

Yes

No

Auto-accept requests?

Yes

No

Caution: If you select yes for the Auto-accept requests option, any user requests sent to this group will automatically be added or removed.

Send membership requests to the following e-mail address:

- **Name:** AFLAdministrators
- **Who can view the membership of the group?** : Everyone
- **Who can edit the membership of the group?** : Group member

AFLHumanResource: This group is Human Resource group

Same as configuration of AFLAdministrators

<p>Name and About Me Description Type a name and description for the group.</p>	<p>Name: <input type="text" value="AFLHumanResource"/></p> <p>About Me: <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> Click for help about adding HTML formatting.</p>
<p>Owner The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.</p>	<p>Group owner: <input type="text" value="Long Truong Cong x"/></p>
<p>Group Settings Specify who has permission to see the list of group members and who has permission to add and remove members from the group.</p>	<p>Who can view the membership of the group? <input type="radio"/> Group Members <input checked="" type="radio"/> Everyone</p> <p>Who can edit the membership of the group? <input type="radio"/> Group Owner <input checked="" type="radio"/> Group Members</p>
<p>Membership Requests Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will automatically be added or removed when they make a request.</p> <p>Caution: If you select yes for the Auto-accept requests option, any user requesting access to this group will automatically be added as a member of the group and receive the permission levels associated with the group.</p>	<p>Allow requests to join/leave this group? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Auto-accept requests? <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Send membership requests to the following e-mail address: <input type="text"/></p>

- **Name:** AFLHumanResource
- **Who can view the membership of the group?** : Everyone
- **Who can edit the membership of the group?** : Group member

AFLMembers: This group is Member group

Same as configuration of AFLAdministrators

People and Groups › Change Group Settings ⓘ

Name and About Me Description

Type a name and description for the group.

Name:

About Me:

[Click for help about adding HTML formatting.](#)

Owner

The owner can change anything about the group such as adding and removing members or deleting the group. Only one user or group can be the owner.

Group owner:

Group Settings

Specify who has permission to see the list of group members and who has permission to add and remove members from the group.

Who can view the membership of the group?

Group Members

Everyone

Who can edit the membership of the group?

Group Owner

Group Members

Membership Requests

Specify whether to allow users to request membership in this group and allow users to request to leave the group. All requests will be sent to the e-mail address specified. If auto-accept is enabled, users will

Allow requests to join/leave this group?

Yes

No

Auto-accept requests?

- **Name:** AFLMembers
- **Who can view the membership of the group?** : Everyone
- **Who can edit the membership of the group?** : Group member

Step 3: Add users to the group

This step allows assign role for user.

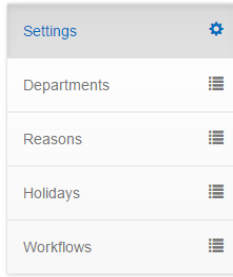
- If user is administrator, please add user to 'AFLAdministrators' group
- If user is human resource, please add user to 'AFLHumanResource' group
- If user is member, please add user to 'AFLMembers' group

Step 4: Change permission to SharePoint lists of app

This step assign permission to SharePoint List that make sure users always have permissions.

AFL List

1. In **Setting** page, click link **All List Setting**.



Categories

- Departments
- Reasons
- Holidays

Settings

- Workflows

SharePoint Lists

- Leave Request
- Tasks
- Workflows
- Departments
- Reasons
- Email templates
- Holidays
- All List settings



2. Click **Customize 'AFL'**

- ▣ [Create new content](#)

[Customize "AFL"](#) 

[Customize "AFL Configurations"](#)

3. Click **Permissions for this list**



ApplicationForLeave

AFL ▸ Settings

List Information

Name: AFL
Web Address: <http://apps-b04b8d3dde07f1.sharepointapps.local/ApplicationForLeave/Lists/AFL/AllItems.aspx>
Description: Application for leave

General Settings

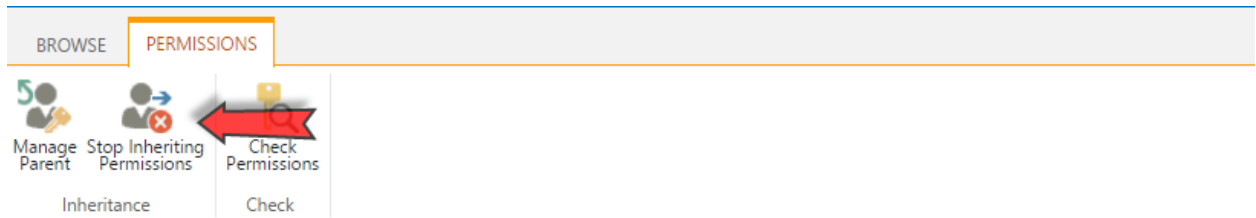
- ▣ [List name, description and navigation](#)
- ▣ [Versioning settings](#)
- ▣ [Advanced settings](#)
- ▣ [Validation settings](#)
- ▣ [Audience targeting settings](#)
- ▣ [Rating settings](#)

Permissions and Management

- ▣ [Delete this list](#)
- ▣ [Save list as template](#)
- ▣ [Permissions for this list](#)
- ▣ [Generate file plan report](#)
- ▣ [Enterprise Metadata and Keywords Settings](#)
- ▣ [Information management policy settings](#)



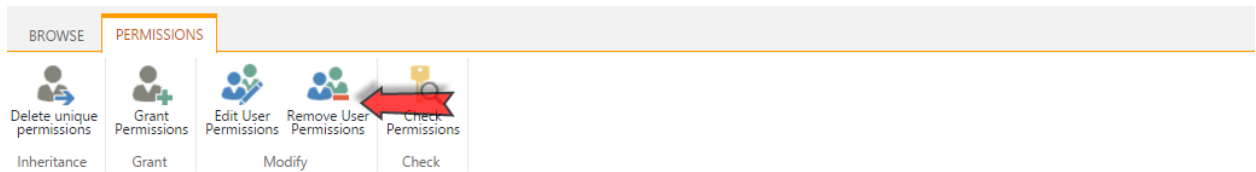
4. In ribbon bar, click **Stop Inheriting Permission**.



This list inherits permissions from its parent. (Home)

<input type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/> Approvers	SharePoint Group	Approve
<input type="checkbox"/> Designers	SharePoint Group	Design
<input type="checkbox"/> Excel Services Viewers	SharePoint Group	View Only
<input type="checkbox"/> Hierarchy Managers	SharePoint Group	Manage Hierarchy
<input type="checkbox"/> Home Members	SharePoint Group	Edit

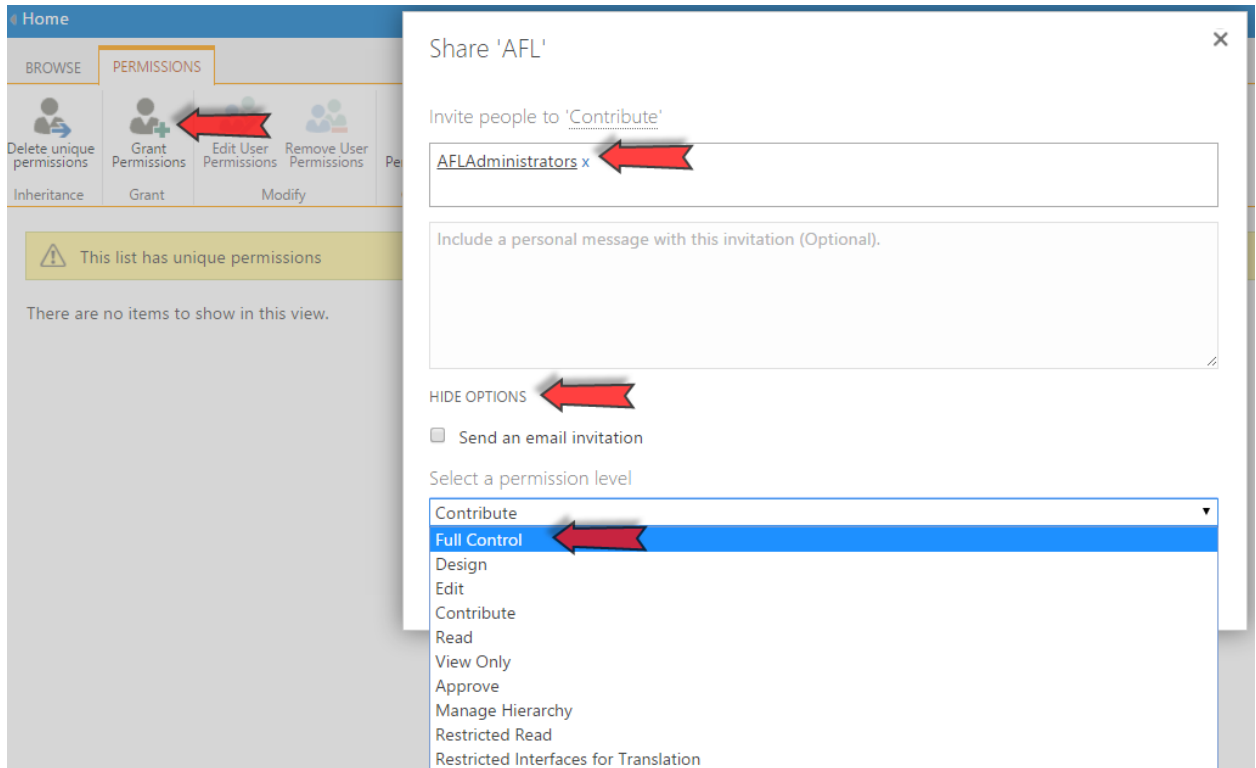
5. Select all permission in list view and click **Remove User Permission**.



This list has unique permissions

<input checked="" type="checkbox"/> Name	Type	Permission Levels
<input checked="" type="checkbox"/> <input type="checkbox"/> Approvers	SharePoint Group	Approve
<input checked="" type="checkbox"/> <input type="checkbox"/> Designers	SharePoint Group	Design
<input checked="" type="checkbox"/> <input type="checkbox"/> Excel Services Viewers	SharePoint Group	View Only
<input checked="" type="checkbox"/> <input type="checkbox"/> Hierarchy Managers	SharePoint Group	Manage Hierarchy
<input checked="" type="checkbox"/> <input type="checkbox"/> Home Members	SharePoint Group	Edit
<input checked="" type="checkbox"/> <input type="checkbox"/> Home Owners	SharePoint Group	Full Control
<input checked="" type="checkbox"/> <input type="checkbox"/> Home Visitors	SharePoint Group	Read
<input checked="" type="checkbox"/> <input type="checkbox"/> Restricted Readers	SharePoint Group	Restricted Read
<input checked="" type="checkbox"/> <input type="checkbox"/> Translation Managers	SharePoint Group	Restricted Interfaces for Translation

6. Then click **Grant Permissions**. Choose **AFLAdministrators** SharePoint Group -> click **Show Options** -> Select **Full Control**. Then click **Share**



7. Same as above for **AFLHumanResource** is **Contribute**

Share 'AFL' ✕

Invite people to 'Contribute'

AFLHumanResource x

Include a personal message with this invitation (Optional).

HIDE OPTIONS

Send an email invitation

Select a permission level

Contribute ▼

Share Cancel

8. Same as above for **AFLMembers** is **Contribute**

Share 'AFL' ✕

Invite people to 'Contribute'

[AFLMembers](#) x

Include a personal message with this invitation (Optional).

HIDE OPTIONS

Send an email invitation

Select a permission level

Contribute ▼

Share
Cancel

AFL Configurations

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Read**
- **AFLMembers** is **Read**

<input type="checkbox"/>	<input type="checkbox"/> Name
<input type="checkbox"/>	AFLAdministrators
<input type="checkbox"/>	AFLHumanResource
<input type="checkbox"/>	AFLMembers

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Read
SharePoint Group	Read

AFL Departments

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Contribute**
- **AFLMembers** is **Read**

<input type="checkbox"/>	<input type="checkbox"/>	Name
<input type="checkbox"/>	<input type="checkbox"/>	AFLAdministrators
<input type="checkbox"/>	<input type="checkbox"/>	AFLHumanResource
<input type="checkbox"/>	<input type="checkbox"/>	AFLMembers

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Contribute
SharePoint Group	Read

AFL Email Template

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Read**
- **AFLMembers** is **Read**

<input type="checkbox"/>	<input type="checkbox"/>	Name
<input type="checkbox"/>	<input type="checkbox"/>	AFLAdministrators
<input type="checkbox"/>	<input type="checkbox"/>	AFLHumanResource
<input type="checkbox"/>	<input type="checkbox"/>	AFLMembers

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Read
SharePoint Group	Read

AFL Holidays

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Contribute**
- **AFLMembers** is **Read**

<input type="checkbox"/>	<input type="checkbox"/>	Name
<input type="checkbox"/>	<input type="checkbox"/>	AFLAdministrators
<input type="checkbox"/>	<input type="checkbox"/>	AFLHumanResource
<input type="checkbox"/>	<input type="checkbox"/>	AFLMembers

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Contribute
SharePoint Group	Read

AFL Reasons

Same as **AFL List**

- **AFLAdministrator** is **Full Control**

- **AFLHumanResource** is **Contribute**
- **AFLMembers** is **Read**

- Name
- [AFLAdministrators](#)
- [AFLHumanResource](#)
- [AFLMembers](#)

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Contribute
SharePoint Group	Read

AFL Style Library

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Read**
- **AFLMembers** is **Read**

- Name
- [AFLAdministrators](#)
- [AFLHumanResource](#)
- [AFLMembers](#)

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Read
SharePoint Group	Read

AFL Tasks

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Contribute**
- **AFLMembers** is **Contribute**

- Name
- [AFLAdministrators](#)
- [AFLHumanResource](#)
- [AFLMembers](#)

Type	Permission Levels
SharePoint Group	Full Control
SharePoint Group	Contribute
SharePoint Group	Contribute

AFL Workflows

Same as **AFL List**

- **AFLAdministrator** is **Full Control**
- **AFLHumanResource** is **Read**

➤ **AFLMembers is Read**

<input type="checkbox"/>	<input type="checkbox"/>	Name	Type	Permission Levels
<input type="checkbox"/>	<input type="checkbox"/>	AFLAdministrators	SharePoint Group	Full Control
<input type="checkbox"/>	<input type="checkbox"/>	AFLHumanResource	SharePoint Group	Read
<input type="checkbox"/>	<input type="checkbox"/>	AFLMembers	SharePoint Group	Read

Step 5: Change workflows

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

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

Settings	+ New								Status: Active ▼
Departments	Edit	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
Reasons		Requestor		No	Manager	1	Yes		
Holidays		Manager		Yes	Human resource	2	Yes		
Workflows 		Human resource	Administrator	No	Finished	3	Yes		

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

Workflow □

Title
 1

Select User
 Yes No **2**

Assign To
 3

Next Step
 4

Active
 Yes No **5**

Order
 6

7

- (1): Name of step
- (2): Select User. If Select User is yes => User will choose "Assign To" at "Request" Form. Else choose "Assign To" at this form.
- (3): Assign To: if select user is no
- (4): Next Step: if this step is last step, this step is Finished
- (5): Active
- (6): Order By
- (7): 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

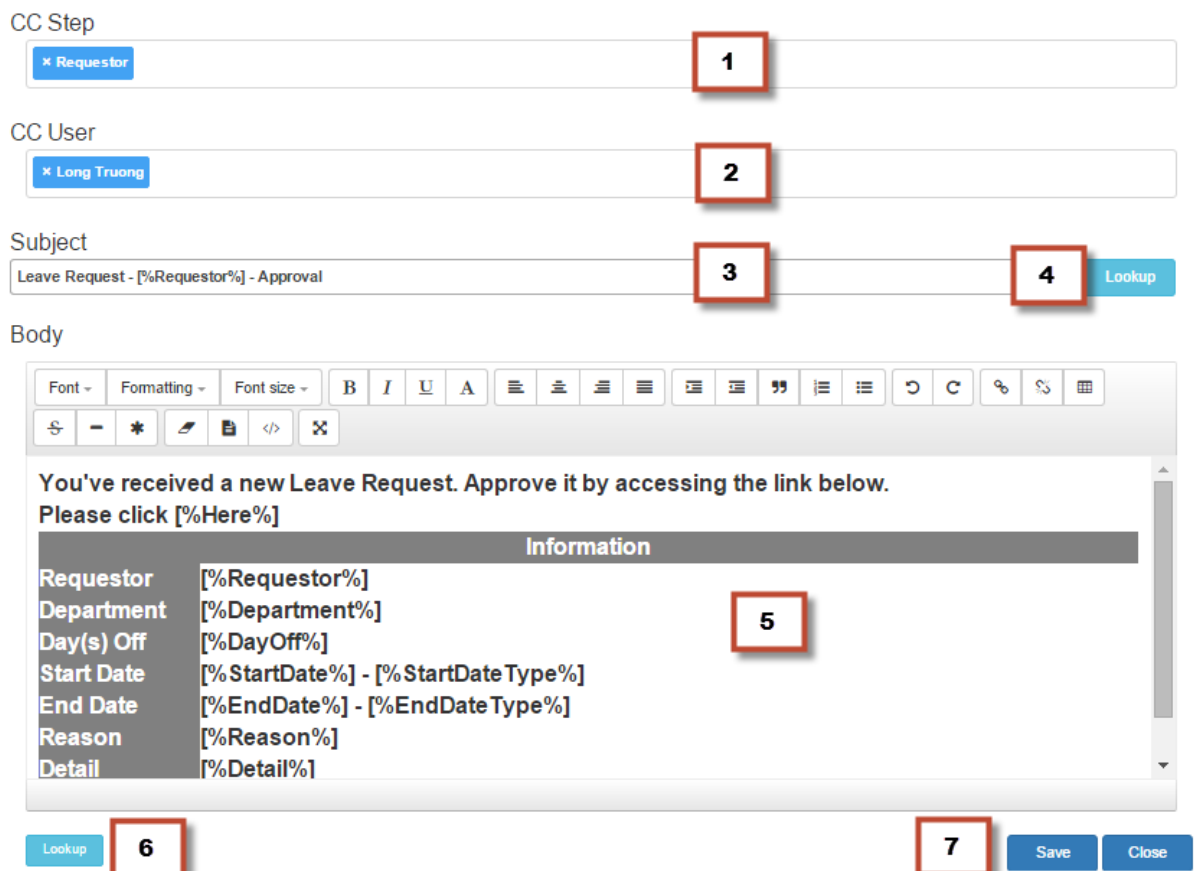
This step allows administrator to change the Email Template for consistent an organization.

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



Edit	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
	Requestor		No	Manager	1			
	Manager		Yes	Human resource	2	Yes		
	Human resource	Administrator	No	Finished	3	Yes		

2. Edit an email template



CC Step: (1)

CC User: (2)

Subject: (3) (4)

Body:

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

Information	
Requestor	[%Requestor%]
Department	[%Department%]
Day(s) Off	[%DayOff%]
Start Date	[%StartDate%] - [%StartDate Type%]
End Date	[%EndDate%] - [%EndDate Type%]
Reason	[%Reason%]
Detail	[%Detail%]

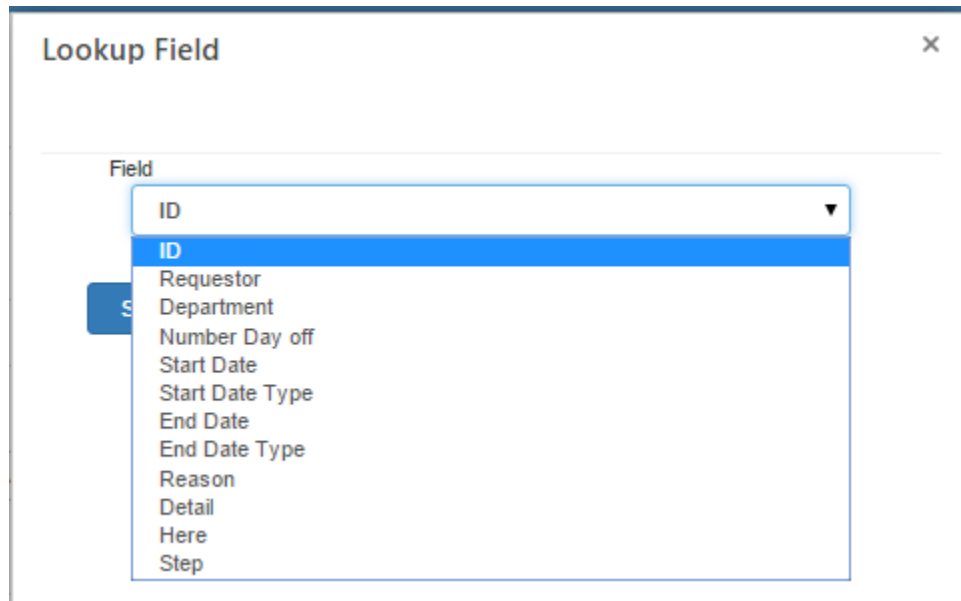
 (5)

(6) (7)

- (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



- Requestor: Requestor name
- Department: Department Name
- Number Day off: Number of days off
- Start Date
- Start Date Type: Full Day, Morning or Afternoon
- End Date
- End Date Type: Full Day, Morning or Afternoon
- Reason
- Detail
- Step
- Here: Link to "Request" form