MULTI APPROVAL PROCESS

Configuration guide

Version 2.1

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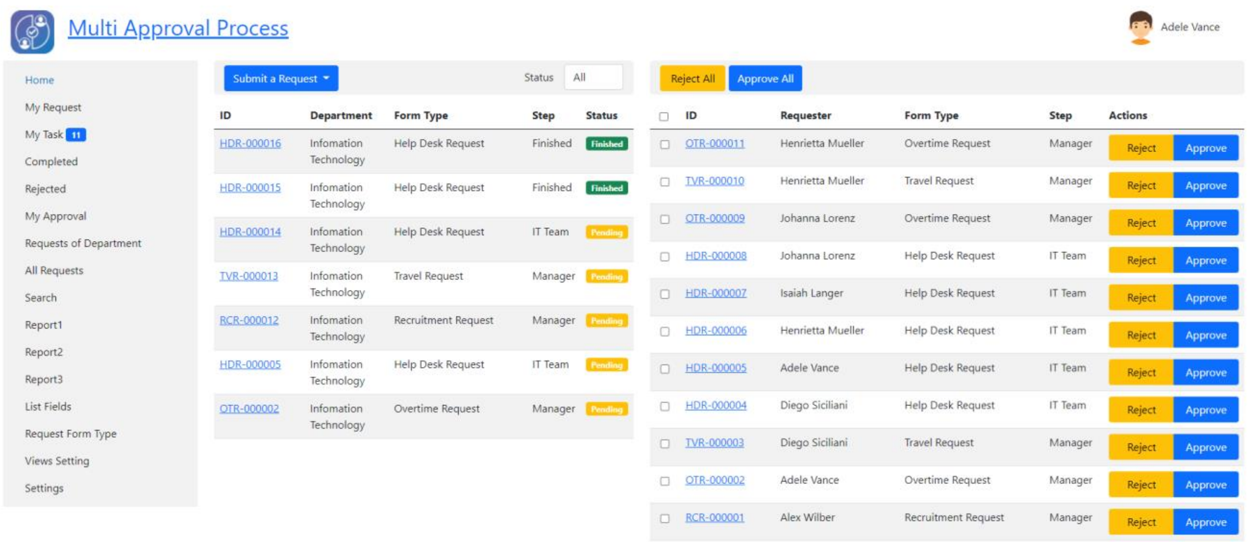
MENU

Multi Approval Process for SharePoint

Request, track, approve and manage the requested. Easy to use, configured, and very flexible

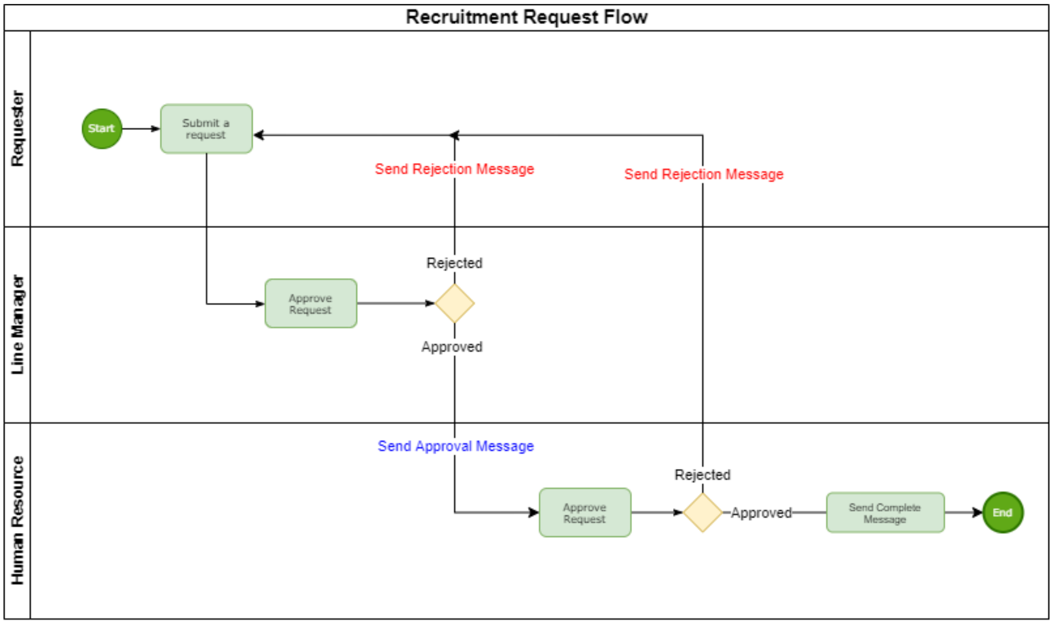
Overview

The Multi Approval Process is the add-in in SharePoint, Microsoft Team & Microsoft Outlook. It supports the organization and creates a lot of approval systems without coding. It allows the creation of unlimited approval systems, and unlimited workflows, and changes anything in the system for consistency with your organization. End users easy to create & manage the request. It provides all information to help the manager makes the approval. It is also a SharePoint Hosted add-in, all data of the add-in saves on your SharePoint site. Very easy to use, configuration.

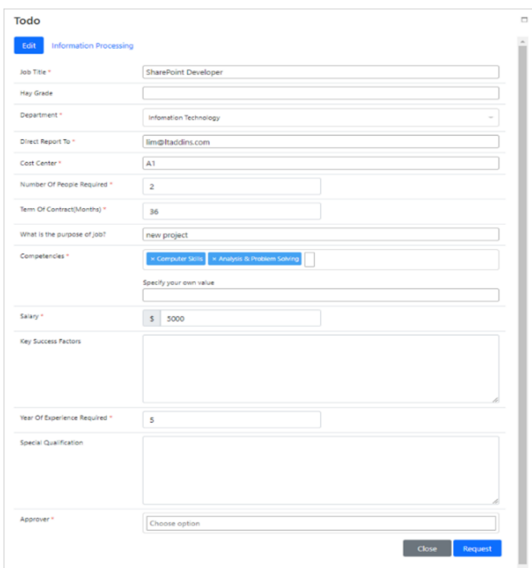


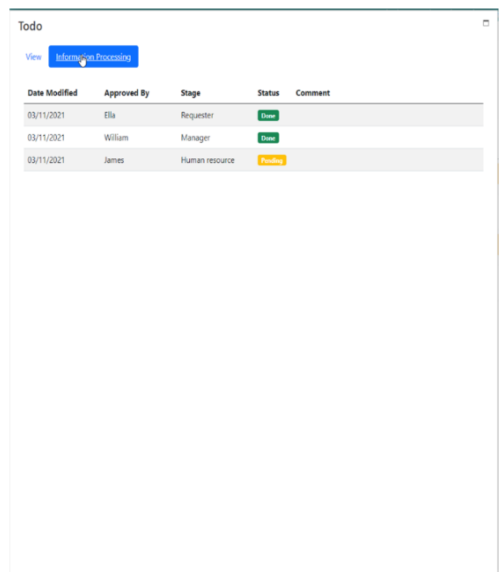
Currently, the add-in has 4 default approval systems

1. Recruitment Request: Finding and hiring the best and most qualified candidate for a job opening, in a timely and cost-effective manner
   - Workflow

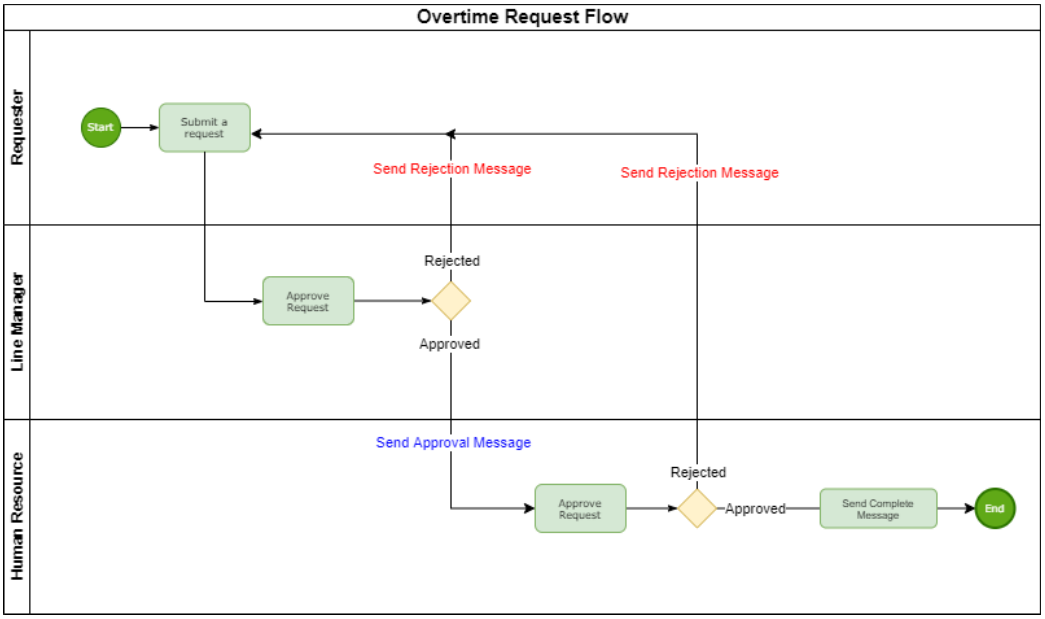


- Layout





2. Overtime Request: Supports users to request overtime in the organization
    - Workflow



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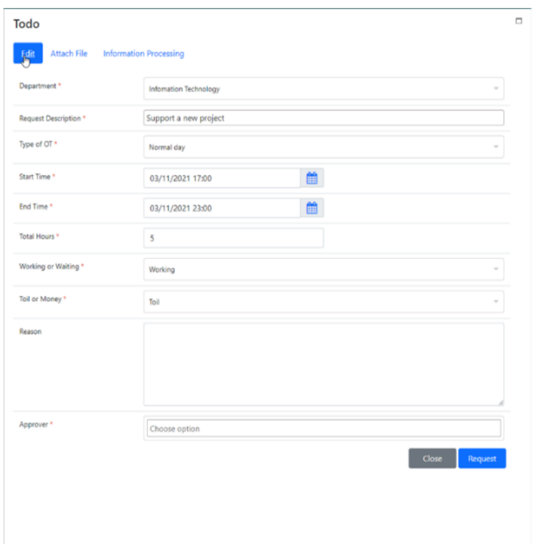
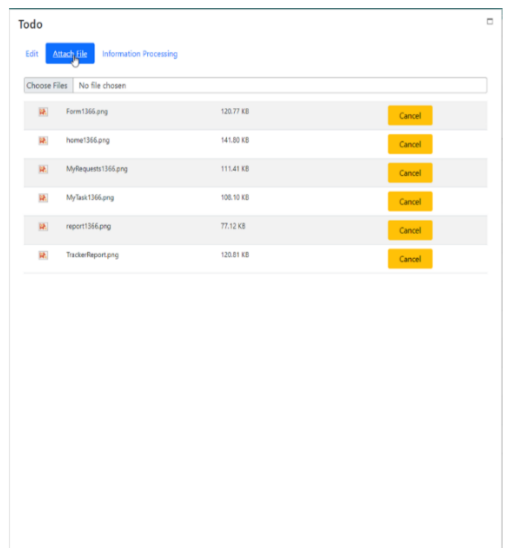
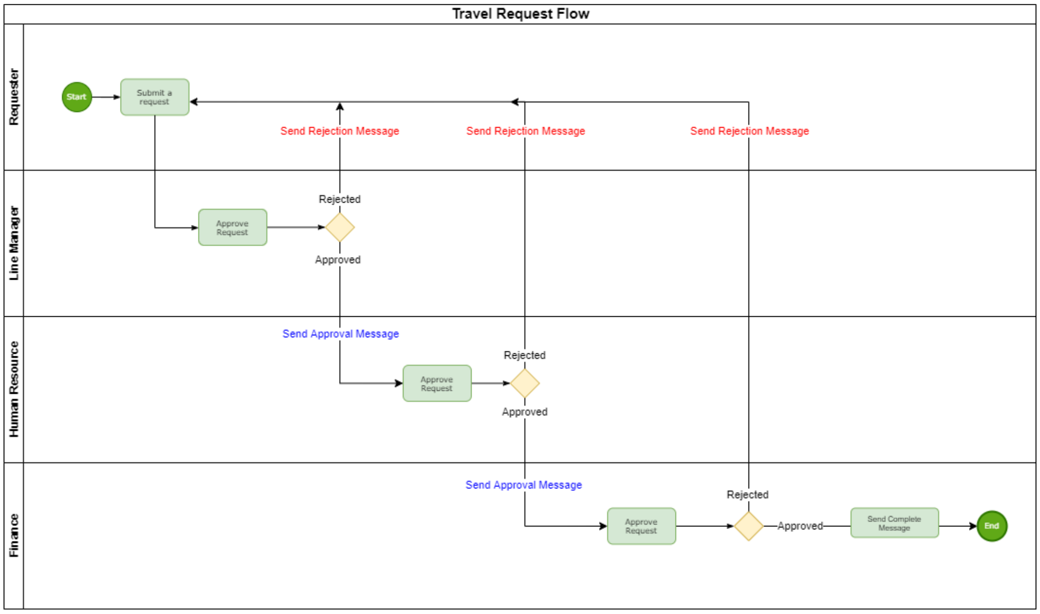
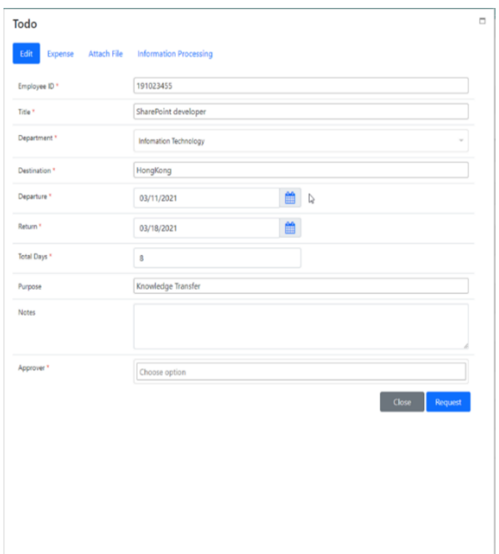


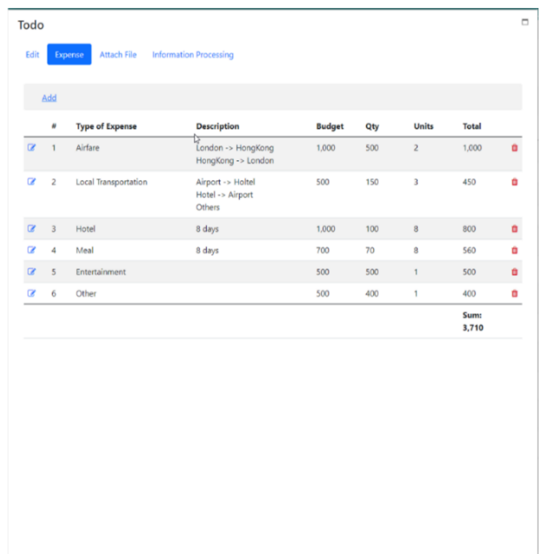


3. Travel Request: Handling of the request and approval process of business trips
   - Workflow

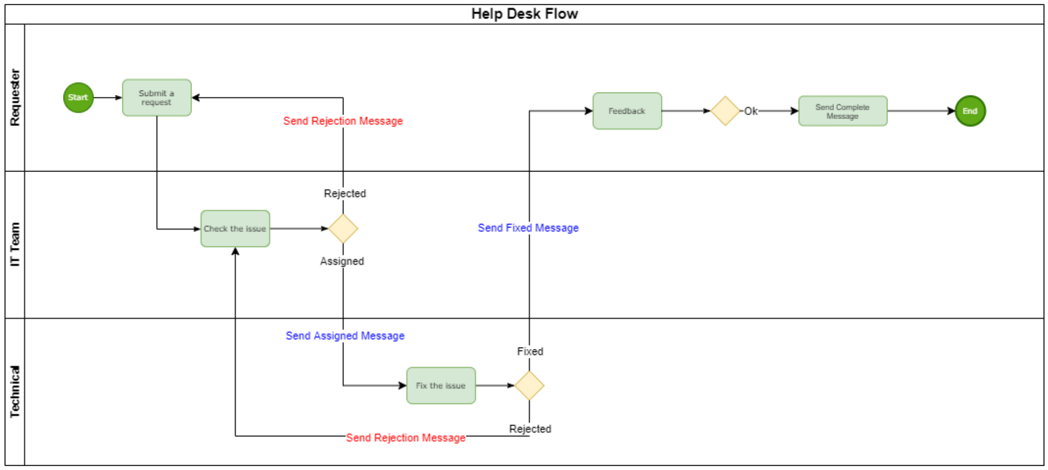


- Layout

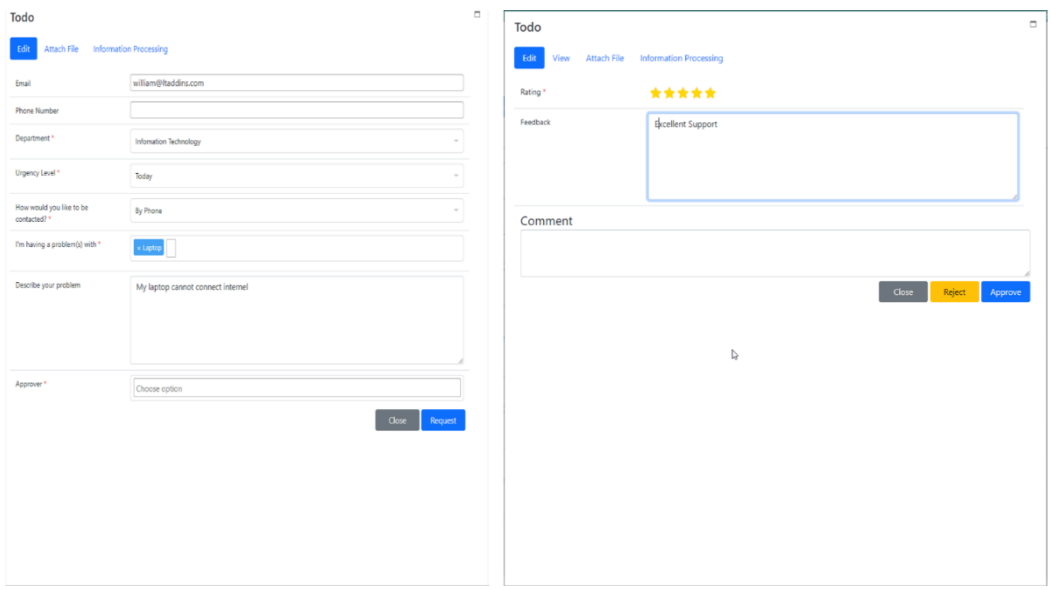




4. Help Desk Request: Resolve end-user issues efficiently by simply automating the complaint resolution process with ticket management
    - Workflow



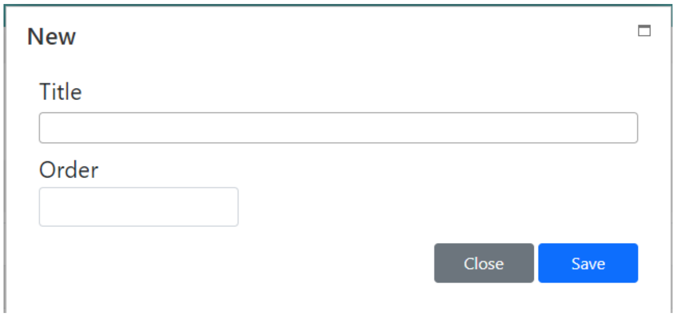
- Layout



Setup a new approval process

Create a new approval process

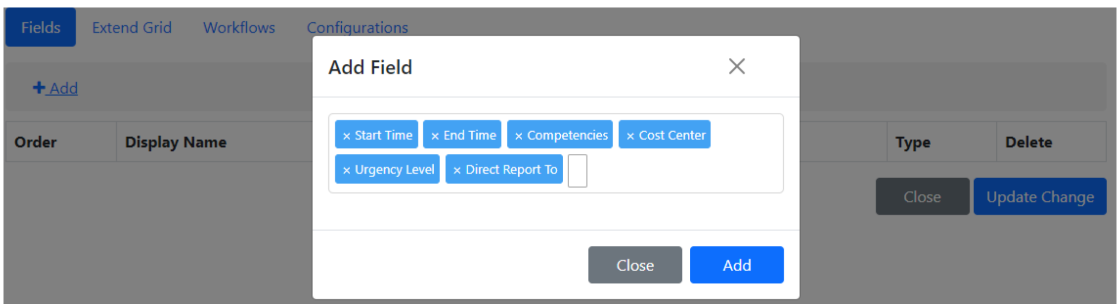
1. Open the app, click the **Request Form Type link** in the left menu
2. Click the **New** button
3. Input the title of the new approval system & order field



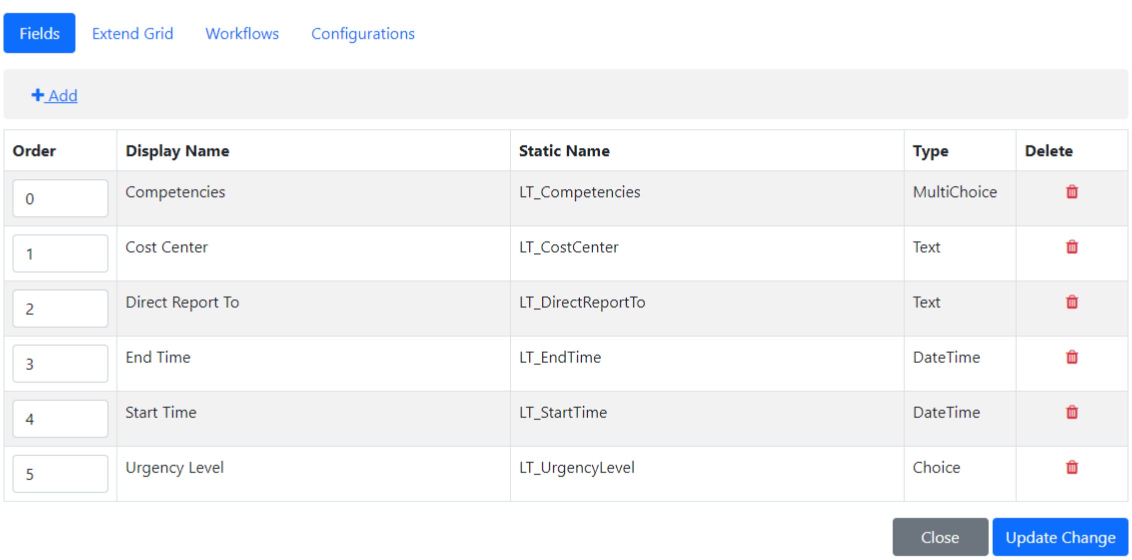
4. Click the **Save** button

Set up the request form

1. Click the **edit icon** of the new approval process on the **Request Form Type** page
2. In the **Fields** tab, click the **Add** button
3. In the page appears, choose fields that want to display in the form



4. Click the **Add** button & the **Update Change** button
5. To reorder fields in the form, change the **number** in the **Order** column
6. To remove the field in the form, click the **delete icon** in the **Delete** column



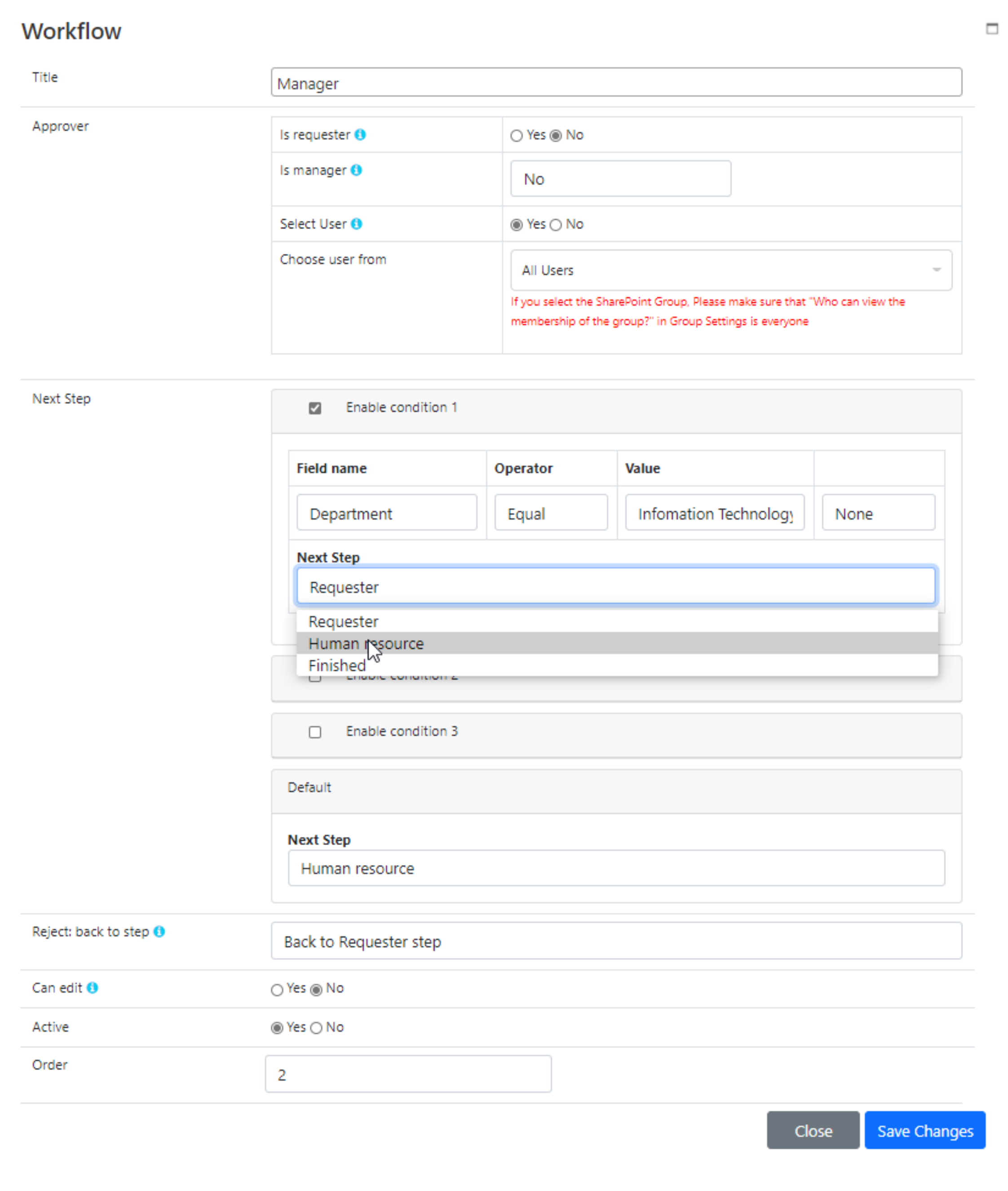
Order	Display Name	Static Name	Type	Delete
0	Competencies	LT_Competencies	MultiChoice	
1	Cost Center	LT_CostCenter	Text	
2	Direct Report To	LT_DirectReportTo	Text	
3	End Time	LT_EndTime	DateTime	
4	Start Time	LT_StartTime	DateTime	
5	Urgency Level	LT_UrgencyLevel	Choice	

Set up the workflow for the new approval process

Repeat the steps below when having a workflow process you want

Create a new step of the workflow

1. In the **Workflow** tab, click the Add button
2. OnIn the page appears



3. Input the **title** of the step

4. In the **Approver** section, it has 3 options
    a. **Is requester**: if select is Yes, the **approver** is the **Requester** who submits the request. Ex the **feedback & rating step** in the Helpdesk Request
    b. **Is Manager**:
        - **No**: The app doesn't automatically get the manager. The end-user will choose the manager
        - **From User Info List**: The app automatics get the manager who has been configured on the **User Info List page**
        - **From Manager of Department**: The app automatics get the manager who has been configured in the **Manager of Department page**
    c. **Select User**
        - **Yes:** The end-user will select the approver when submitting/ Approving the request
        - **No:** The app will get the approver from the Assign To when submitting/approving the request
5. In the **Next Step** section, it has 4 options: 3 conditions & 1 default. The priority order: **Condition 1** > **Condition 2** > **Condition 3** > **Default**. It means if the request hits **condition 1**, the next step of the process is the **next step configured in condition 1**. The same with conditions 2 & 3. If the request doesn't hit 3 conditions, it will jump to the default next step
    a. 3 conditions: The field name only displays fields that have the type is **Number**, **Dropdown,** or **Sum/Count** in the **extended grid**
    b. 3 conditions: The next step only displays steps if the next step has: **Is requester is yes** or **Is manager is No** or **Select User is No**
6. In the **Reject: back to step** section, this is the step if the approver clicks the reject button
7. In the **Can Edit** section, if Yes the approver can edit fields when approving the request. In the **Can edit fields** section, choose fields that the approver can edit. If empty, the approver can edit all fields that setup in the Field tab
8. Active section: No it doesn't use the step

Edit the email template

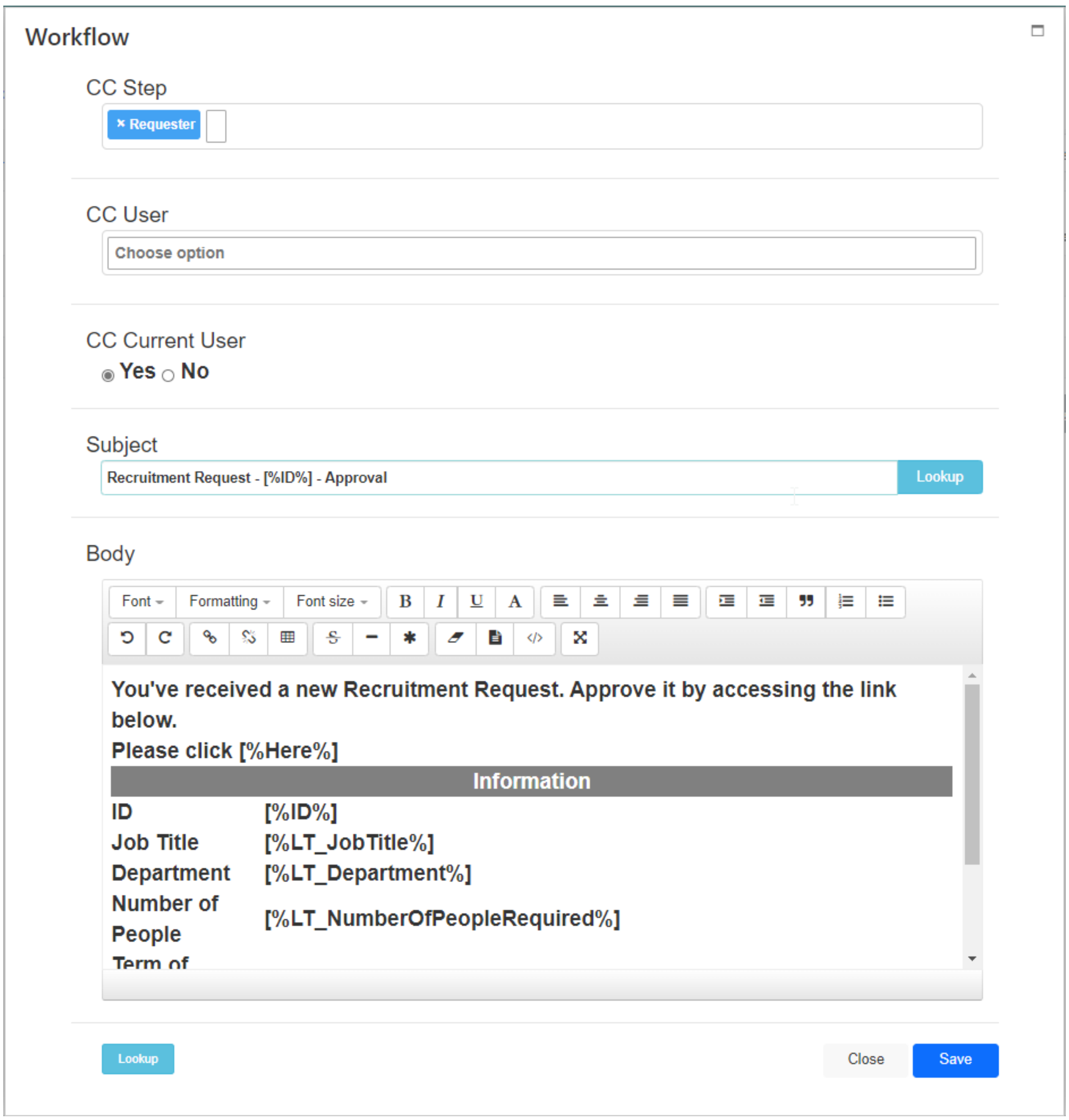
1. In the **Workflows** tab

2. Click the hand icon in the **Email template column**. Up hand, the icon is the approved template, and Down hand icon is the Rejected template

+ New Status: Active

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

3. OnIn the page appears

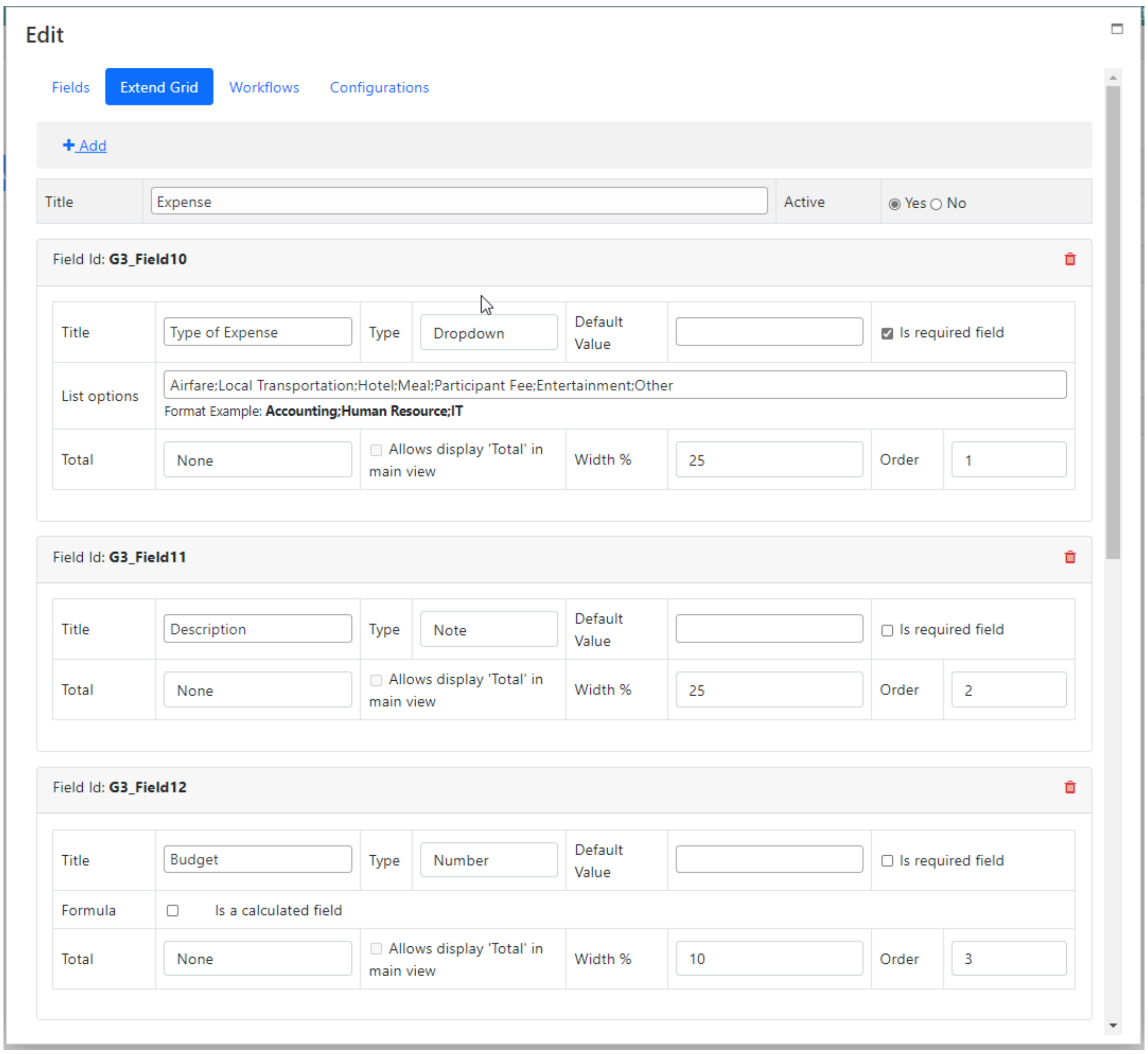


4. In the **CC Step** section, add the step that you want CC in the email

5. In the **CC User** section, add the user who you want to CC in the email
6. In the **CC Current User,** by default the app CC the current user if you don't want this -> choose No
7. Subject of the email, click the **lookup** button to add the field
8. Body of the email
9. Click the Save

Set up the Extend grid

1. In the **Extend Grid** tab



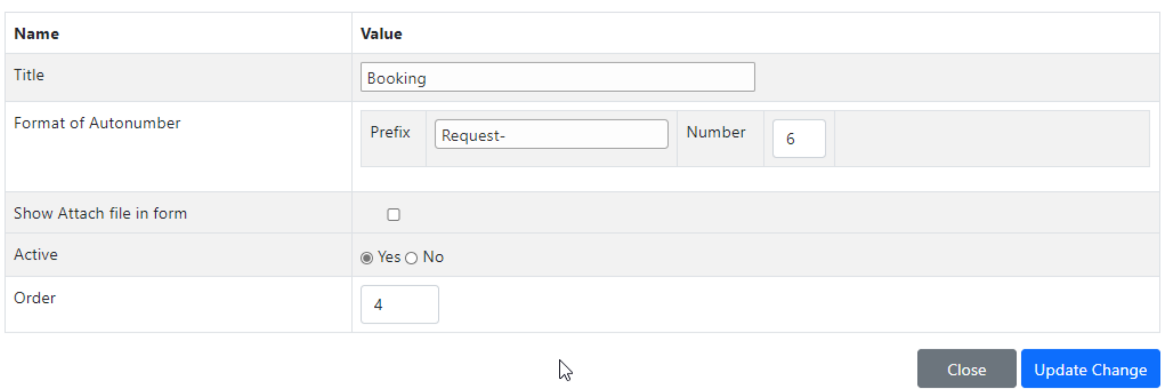
2. Input the **Title** of the extend grid & set **Active** is Yes
3. Click the **Add** button to add the field
4. The app supports 8 types
    a. Single line of text

b. Note
c. Number
d. Date
e. Dropdown
f. Checkbox
g. User
h. Calculated: it only supports the number type

5. The **default value** setting supports – Single line of text, note, number & or dropdown
6. The **Total** setting has 3 options
    a. None
    b. Count: supports all types
    c. Sum: Only supports the number type
7. The **Allows display 'total' in the main view** setting, checked **my request, reports, and search** pages can display the total

Set up the format of the auto number, name of the approval process, attachment

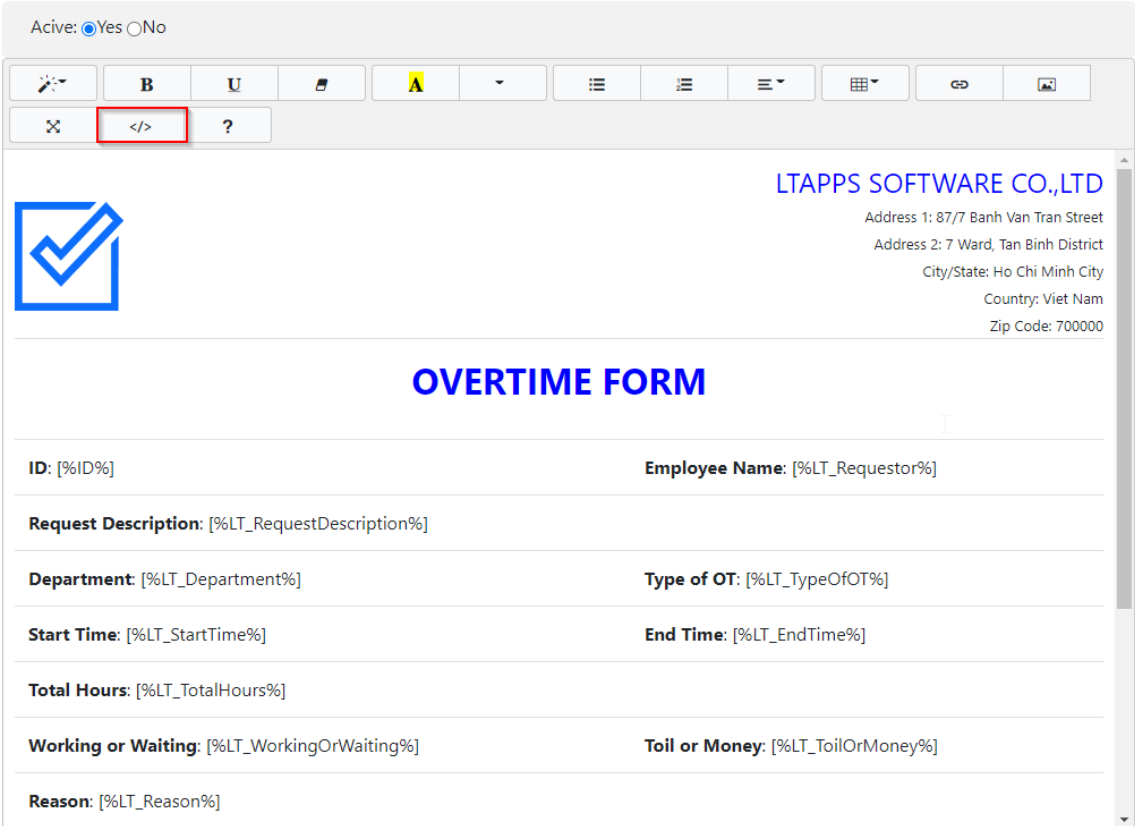
1. In the configuration tab



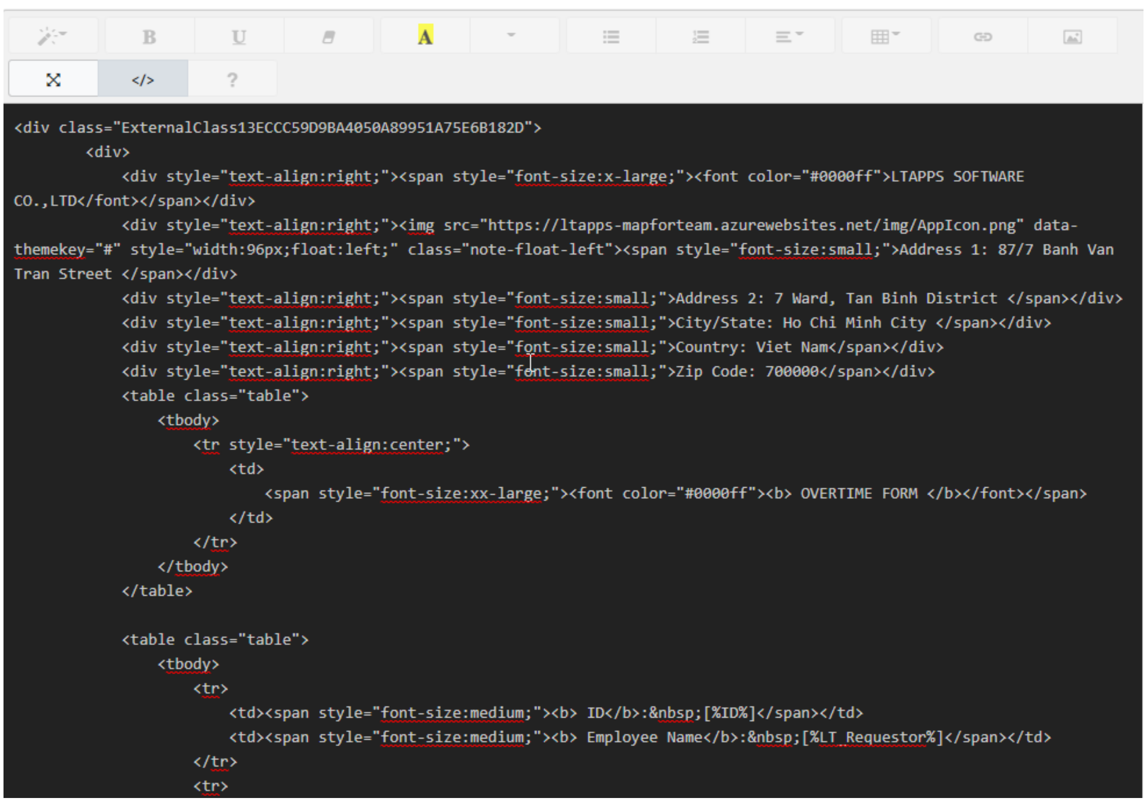
2. **Title**: the name of the approval process
3. **Format of Autonumber**: allows change of the prefix & length of the number
4. **Show attach the file in the form**: if Yes, the attach files tab will display in the request form to allow the end-user uploads the file
5. **Active**: Choose No if you don't allow submit this request anymore

Design the print template

1. In the print tab, preview the print template
2. Click the Edit the Print Template to edit
3. Use the text editor tool to format the template

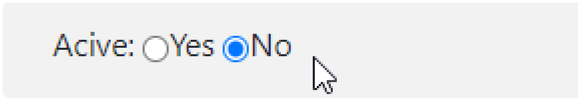


4. Or use the HTML format to edit the template



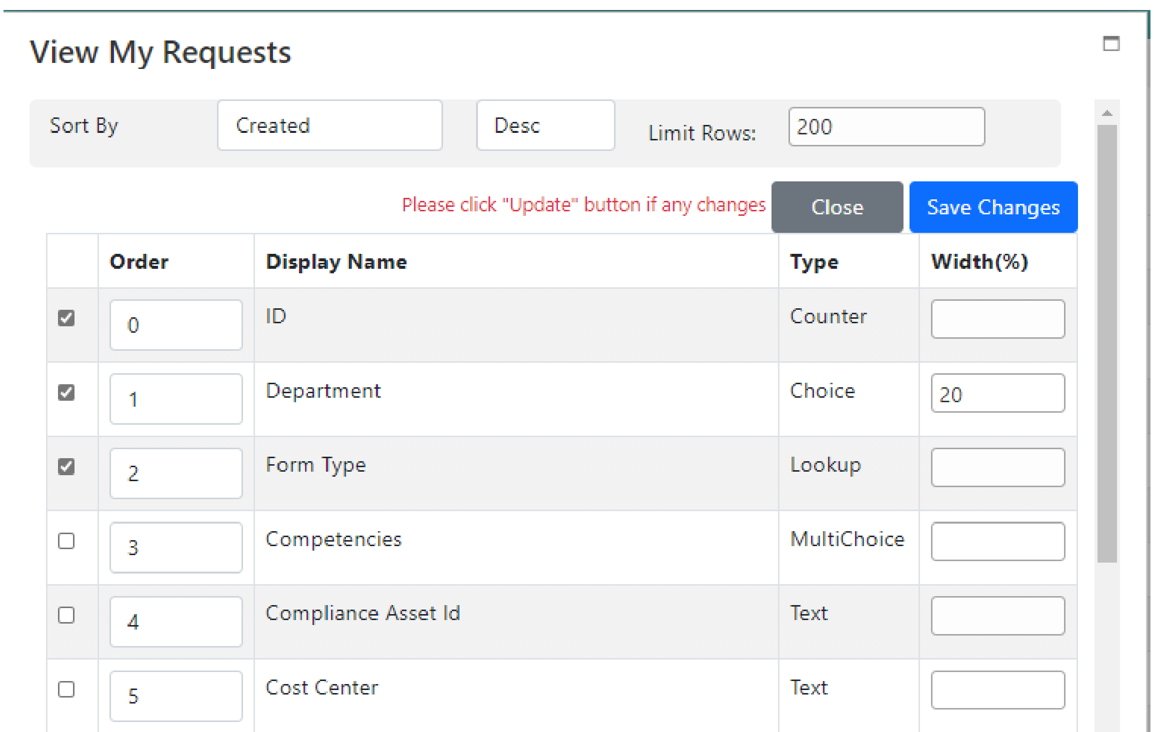
```
<div class="ExternalClass13ECCC59D9BA4050A89951A75E6B182D">
        <div>
            <div style="text-align:right;"><span style="font-size:x-large;"><font color="#0000ff">LTAPPS SOFTWARE CO.,LTD</font></span></div>
            <div style="text-align:right;"><img src="https://ltapps-mapforteam.azurewebsites.net/img/AppIcon.png" data-themekey="#" style="width:96px;float:left;" class="note-float-left"><span style="font-size:small;">Address 1: 87/7 Banh Van Tran Street </span></div>
            <div style="text-align:right;"><span style="font-size:small;">Address 2: 7 Ward, Tan Binh District </span></div>
            <div style="text-align:right;"><span style="font-size:small;">City/State: Ho Chi Minh City </span></div>
            <div style="text-align:right;"><span style="font-size:small;">Country: Viet Nam</span></div>
            <div style="text-align:right;"><span style="font-size:small;">Zip Code: 700000</span></div>
            <table class="table">
                <tbody>
                    <tr style="text-align:center;">
                        <td>
                            <span style="font-size:xx-large;"><font color="#0000ff"><b> OVERTIME FORM </b></font></span>
                        </td>
                    </tr>
                </tbody>
            </table>

            <table class="table">
                <tbody>
                    <tr>
                        <td><span style="font-size:medium;"><b> ID</b>: [%ID%]</span></td>
                        <td><span style="font-size:medium;"><b> Employee Name</b>: [%LT_Requestor%]</span></td>
                    </tr>
                    <tr>
```

5. If you don't want to use this feature, set the Active is No



Set up pages

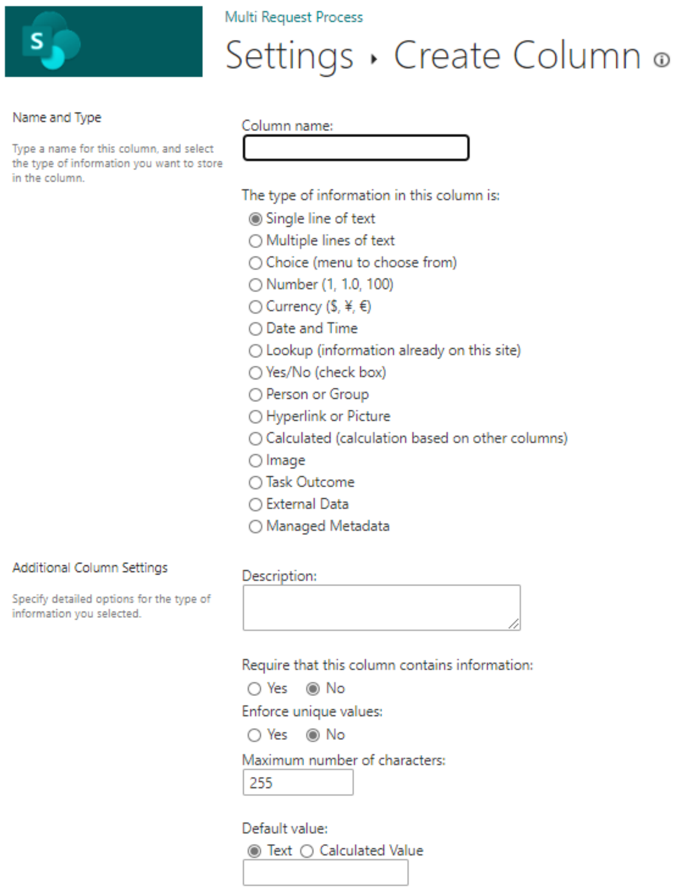
1. Open the app, click the **Views Setting** link in the left menu
2. Click the Edit icon of the page that you want to edit
3. There are 4 types of page
    a. **My Task & My Approval pages**: With this type, it allows display fields that have the number/text/date type
    b. **My Request, Completed, Rejected & All Requests pages**: With this type, it allows display of all types of fields & allows configure the Sort By, number of rows display
    c. **Search** page: With this type, it includes all abilities of the previous type and allows configuring the filter section
    d. **Report** page: With this type, includes all abilities of the previous type and allows adding texts to the header of the report



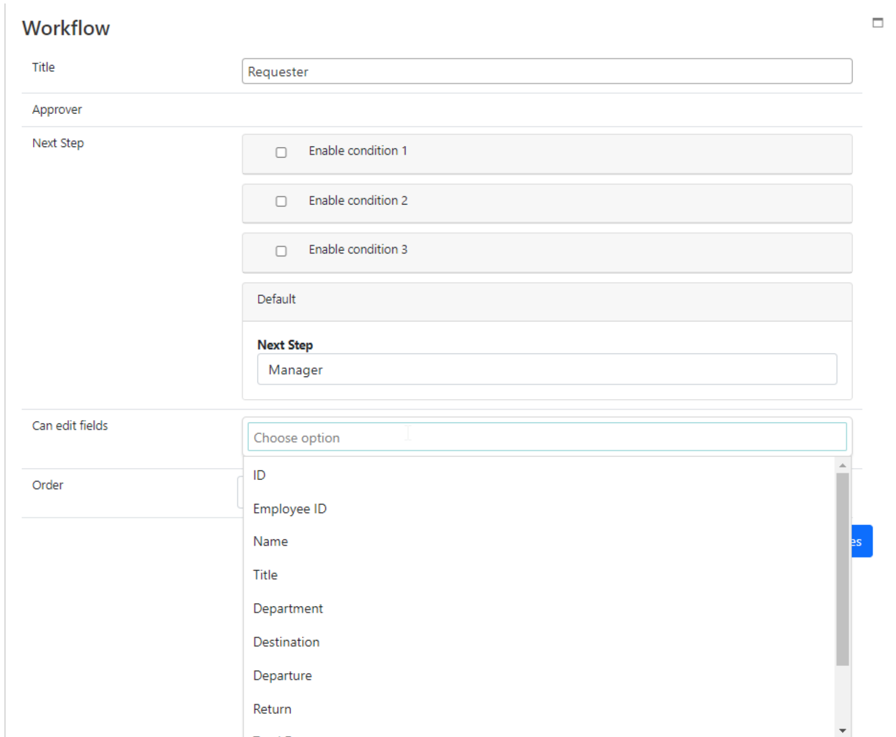
4. After completing all changes, click the **Save Changes** button

Create a new field & add this field to the approval process

1. Open the app, click the **List Fields** link in the left menu
2. In the page appears, click the **Add** button at the top left
3. In the **Create Column** page, input the info & click the Ok button



4. Click the **Request Form Type** link in the left menu, click the icon of the approval process that you want to add the field
5. In the **Fields** tab, click the **Add** button on the page that appears
6. Select the field & click the **Add** button to close the popup
7. Click the **Update Changes** button in the Fields tab
8. If any steps in the Workflows tab that use the feature **Can edit fields**, edit the step & add the field to the **Can edit fields** field



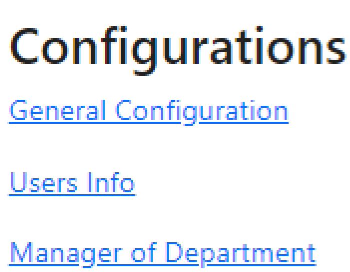
Update the existing field

1. Open the app, click the **List Fields** link in the left menu
2. Click the edit icon of the field that you want to edit
3. In the page appears, edit the field then click the **Ok** Button
4. Click the **Request Form Type** link in the left menu, click the icon of the approval process
5. Click the **Update Change** button

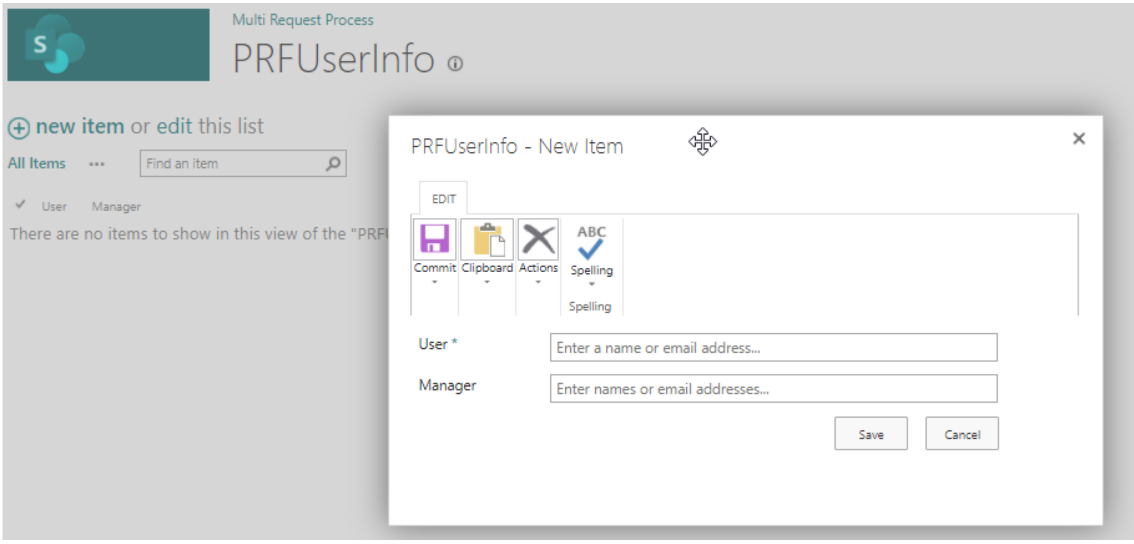
Set up the manager of the user or the department

Set up the manager of the user

1. Click the **Settings** link in the left menu
2. In the **Configurations** zone, click the **User info** link



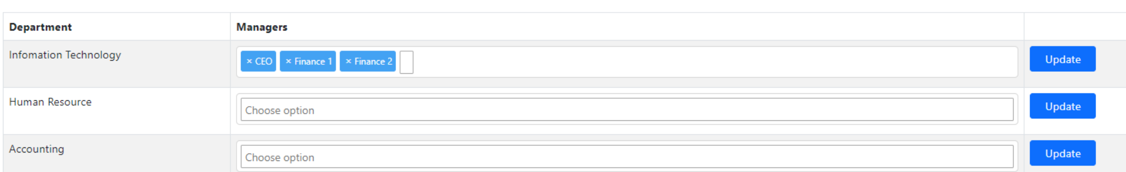
3. In the page appears, click the New item button
4. Input the user & manager fields



5. Click the **Save** button

Set up the manager of the department

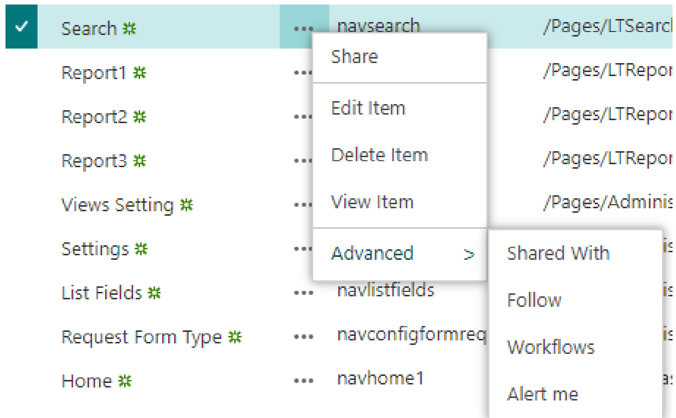
1. Click the **Settings** link in the left menu
2. In the **Configurations** zone, click the **Manager of Department** link
3. Select managers for each department then click the Update button



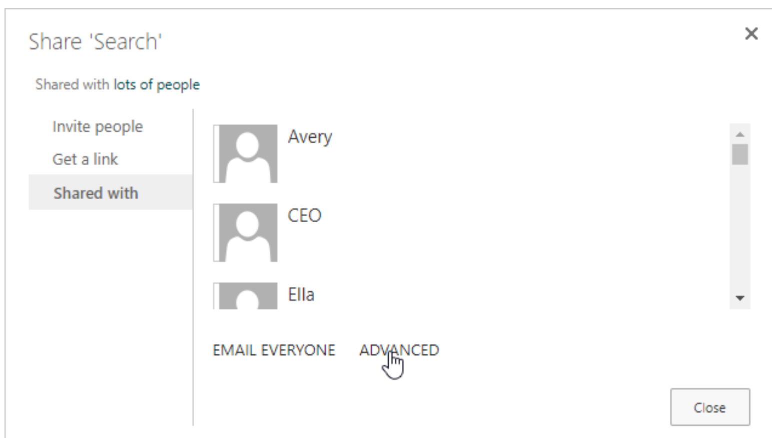
Set up the permission

The permission of the add-in that based on the permission of an item in the menu list. It means if the user doesn't have any permission to report items in the menu list, he/she cannot see the report page. Follow the steps below to set it up

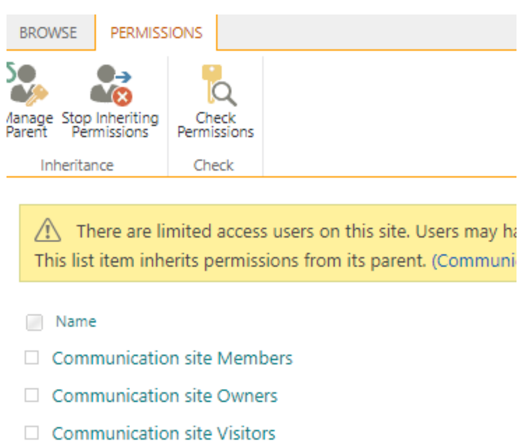
1. Click the **Settings** link in the left menu
2. In the **Permission** zone, click the **Menu** link
3. In the menu list, select the **Search** item -> to click **Advanced -> Shared With** in the context menu



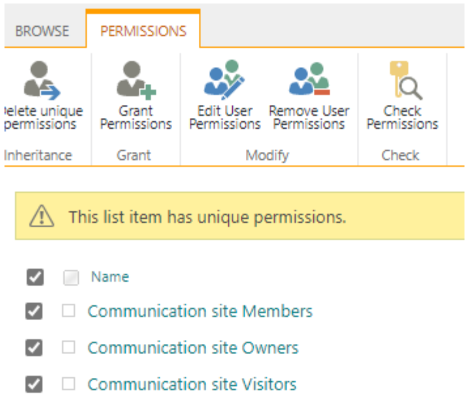
4. Click the **Advanced** button



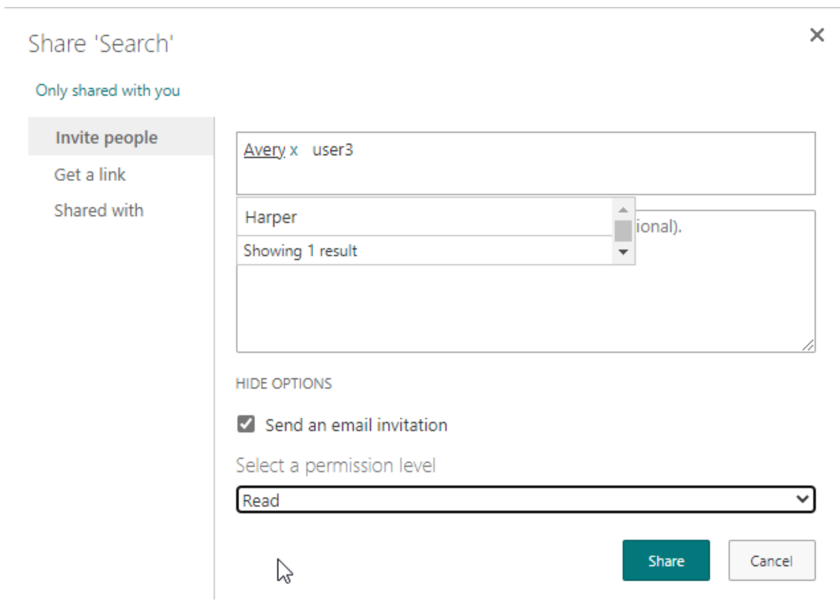
5. Click the Stop Inheriting Permissions icon on the ribbon



6. Select all SharePoint groups / Users then click the **Remove User Permission** icon



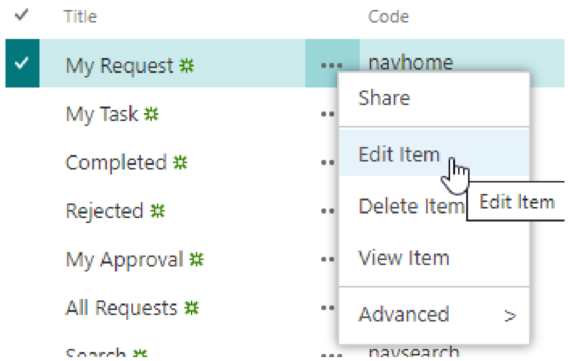
7. After that add the user who can see the **Search** page by clicking the **Grant Permissions** Icon then add the user with the Read permission



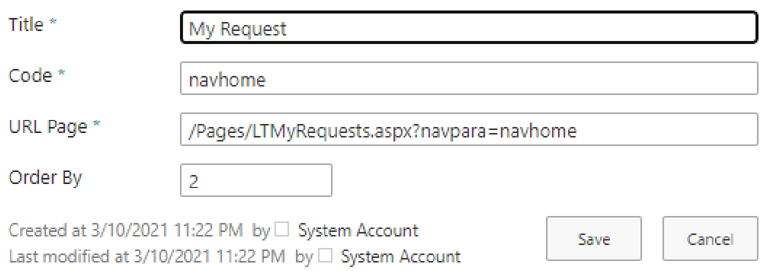
8. Click the **Share** button
9. Repeat all steps above to Pages (Report, settings page) that you want to change the permission

Customize the left menu

1. Click the **Settings** link in the left menu
2. In the **Permission** zone, click the **Menu** link
3. Select the item, click the **Edit item** link



4. Edit the info

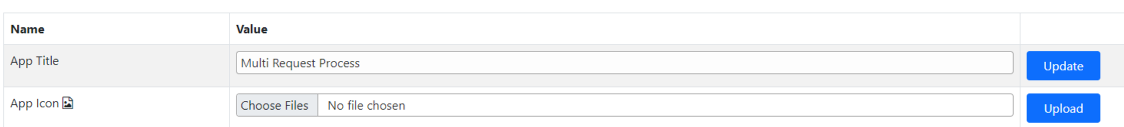


5. Click the **Save** button

General configurations (Datetime format, delete the request, …)

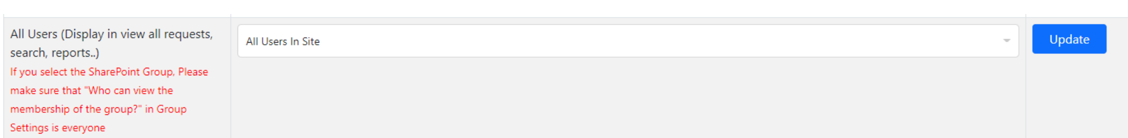
Change the app title & icon

1. Click the **Settings** link in the left menu
2. In the **Permission** zone, click the **General Configurations** link
3. In the page appears, change any info & click the Update button



Set up all users display in the Requester dropdown (All requests, reports, search pages)

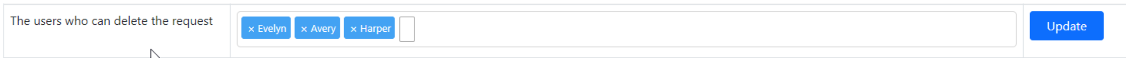
1. In the **General configurations** page, select the SharePoint Group where the requester field gets users



Note: If you select the SharePoint Group, please make sure that "Who can view the membership of the group?" in Group Settings is everyone

Set up the user who can delete the completed request

1. In the **General configurations** page, select the user who can delete the completed request

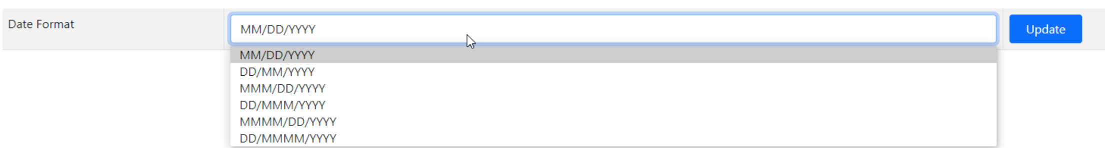


2. Go to the **Search** page, find the request that you want to delete then click the Delete icon at the right of the table

TVR-000014	Mason	Infomation Technology	Travel Request	03/11/2021 16:14	Manager	Pending	
OTR-000013	Harper	Infomation Technology	Overtime Request	03/11/2021 16:13	Manager	Pending	
RCR-000012	James	Infomation Technology	Recruitment Request	03/11/2021 16:13	Manager	Pending	

Set up the DateTime format

1. In the **General configurations** page, select the format in the dropdown



2. Click the **Update** button

Integrations

This feature allows the sync of the request to the SharePoint list in the parent site where the app is installed. After the request completed the process, the app syncs the request to the SharePoint list.

To set it up, follow the steps below

- Going to the Integration page (Setting -> Integrations)
- In the Integration page, input the info & click the Create Parent List button
    - List Name:
    - Is Hidden List:
        - Yes: The list hides in the parent site
        - No: The list is shown on the parent site

To disable/enable this feature, select the **active** is yes/no & click the Update button

To update fields from Leave Request app to the parent list, click the **Sync Fields of the parent** list button

List Name	Multi Approval Process
Is Hidden List	○ Yes ◉ No
Active	◉ Yes ○ No

Update

Click the Create Parent List button to create a SharePoint custom list in the parent site. After the request finished, the app sync the request to the list. You are able to use the Power Automate or other tools to sync the data to other systems.

Click the Update button to update the title / hidden of the parent list and make the intergration feature is active or inactive

Click the Sync Fields to the Parent List button if you make any changes fields in the Customize Form page

Note:

- if the type field (Leave Request) is 'Choice', 'Lookup' => the fype field (Parent list) is 'Single line of text'
- If you change the type field and click the Sync Fields button, may result in a loss of data.
- Don't change the name of view 'All items' of the parent list

Sync Fields of the Parent List

Leave Request - Field Name	Leave Request - Field Type	Parent List - Field Name	Parent List - Field Type
Competencies	Choice	Competencies	Single line of text
Cost Center	Single line of text	Cost Center	Single line of text
Date Create	Date and Time	Date Create	Date and Time
Date Modify	Date and Time	Date Modify	Date and Time
Department	Choice	Department	Single line of text
Departure	Date and Time	Departure	Date and Time