LEAVE REQUEST PRO for SharePoint

Configuration guide

Version 3.1

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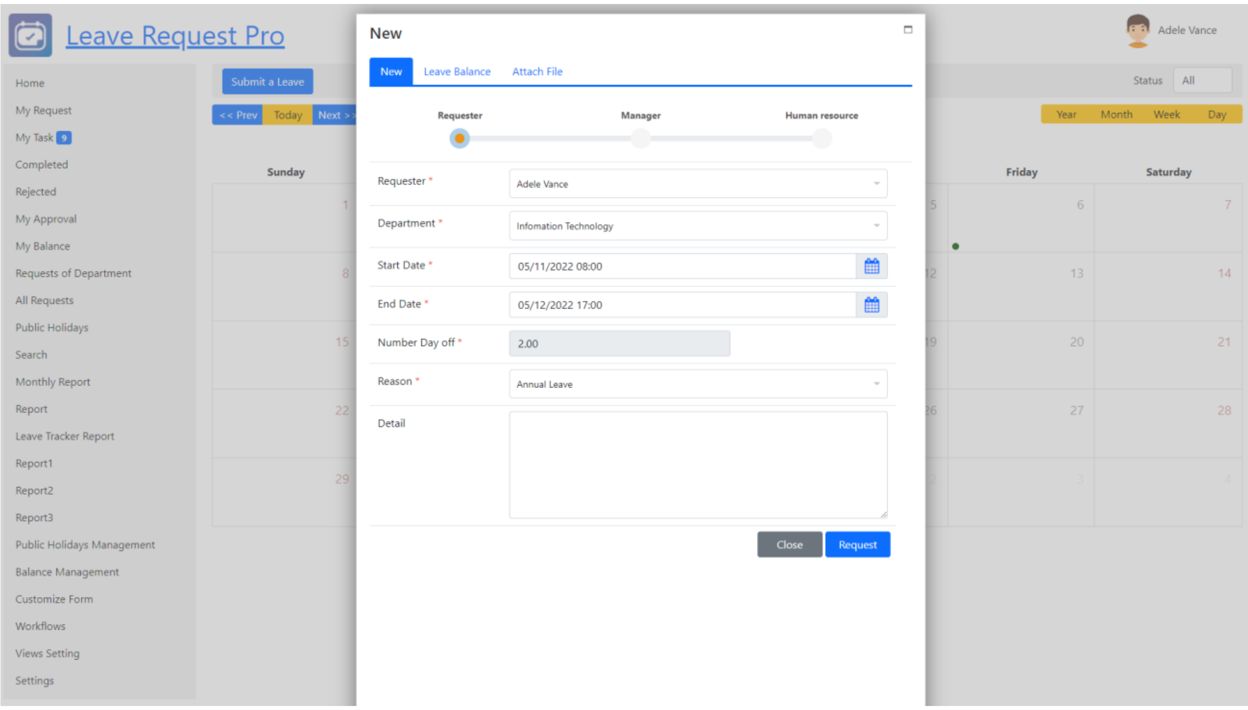
Leave Request Pro for SharePoint

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

Overview

It is a system that supports end-users to request time off in your organization & allows the admin defines the system without code. It allows for creating a custom form and designing the workflow and you can change anything in the system for consistent 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.

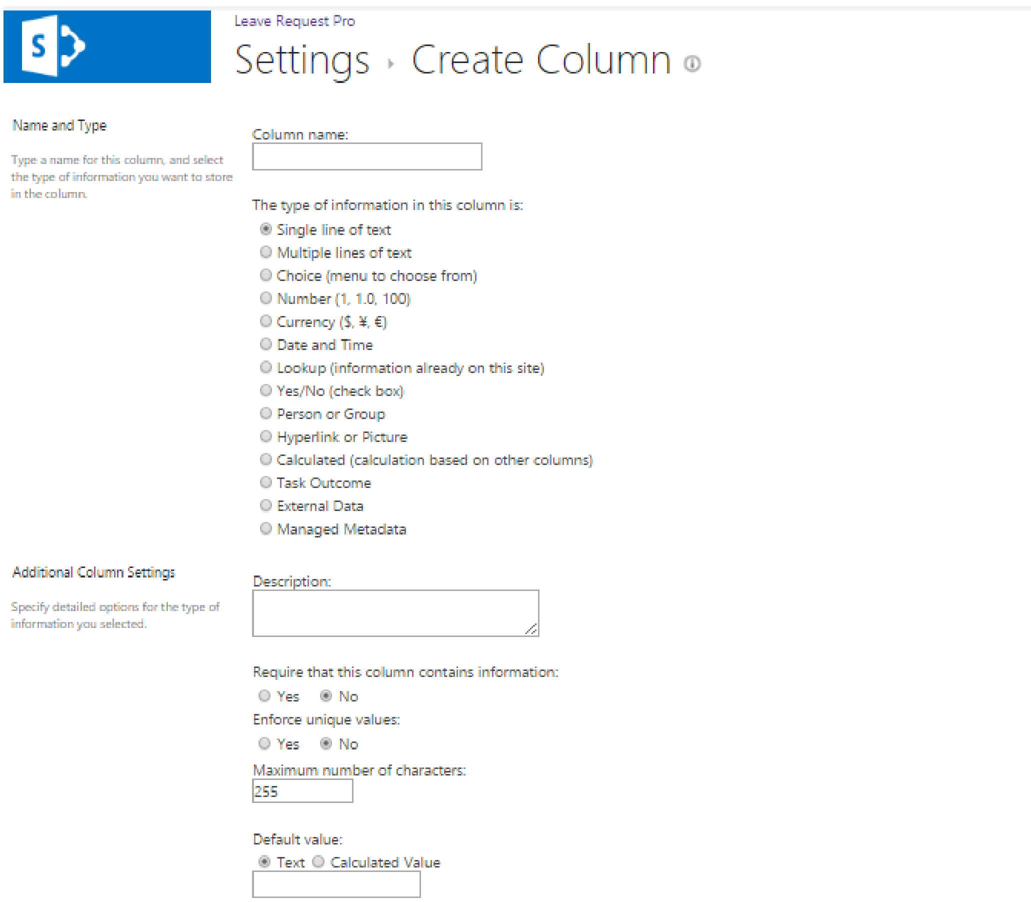


Set up the form request

1. Open the app, click the **Customize Form** page link in the left menu

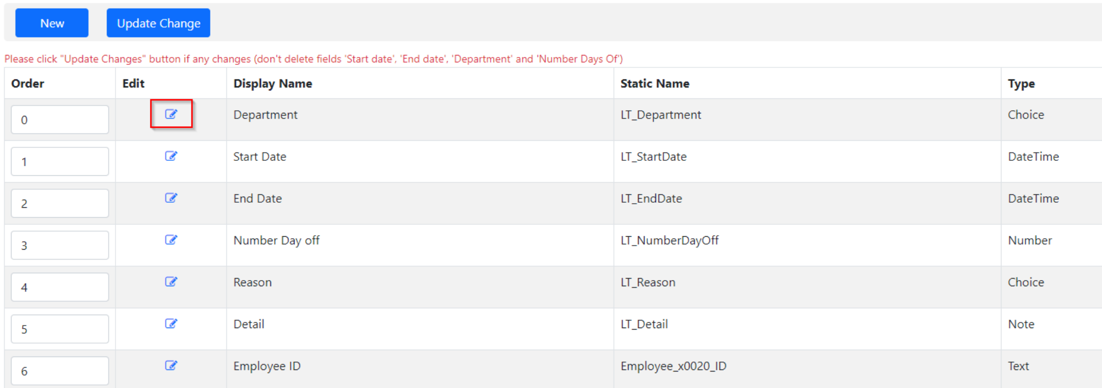
2. Click the New button to create a new field

3. On the page appears,
    - Column name field
    - Type of field
    - The field is a required field or not
    - ....



4. Click the **OK** button

5. Click the **edit** icon to edit the field. E.g. add more departments in the department field



New | Update Change

Please click "Update Changes" button if any changes (don't delete fields 'Start date', 'End date', 'Department' and 'Number Days Of')

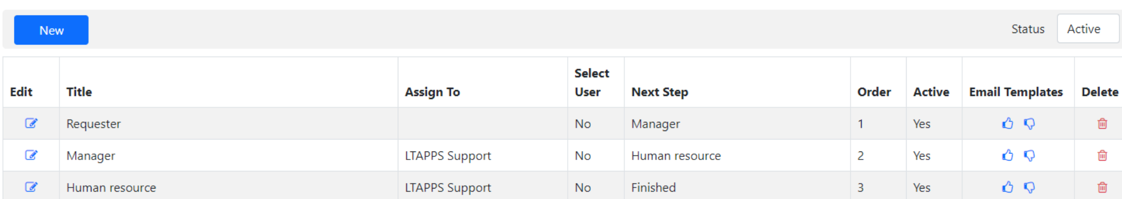
Order	Edit	Display Name	Static Name	Type
0		Department	LT_Department	Choice
1		Start Date	LT_StartDate	DateTime
2		End Date	LT_EndDate	DateTime
3		Number Day off	LT_NumberDayOff	Number
4		Reason	LT_Reason	Choice
5		Detail	LT_Detail	Note
6		Employee ID	Employee_x0020_ID	Text

6. Use the **Order** column to reorder fields in the request form

7. Click the **Save Change** button after completing the change

Set up the workflow

1. Open the app, click the **Workflow** link in the left menu



New | Status | Active

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

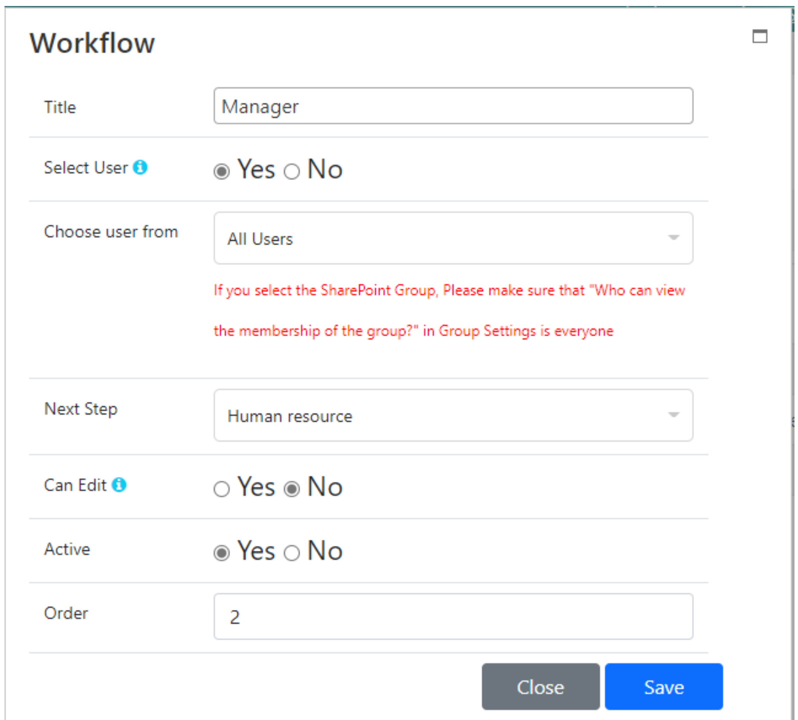
2. Click the New button to add more steps to the workflow

3. Click the edit icon to edit a step

4. In the popup appears, input all fields

- Title: Name of the step
- Select user:
  - If **No**: The Assign To field will display to allow set the person who will the approver of this step
  - If **Yes**: The **approver dropdown** will display in the form when submitting or approving the request. The list of users display in the **approver dropdown** that gets from the SharePoint group in the **Choose User from** the dropdown
- Next step: The step after this step

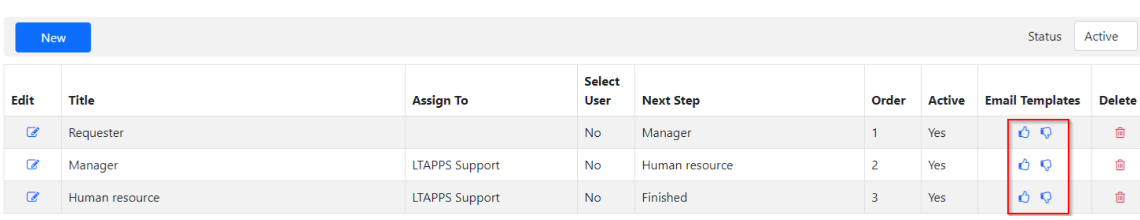
- Can edit: if Yes, this step allows editing all fields (Start date, End date, Reason,… fields)
- Active: if Yes, the step is used in the workflow
- Order



5. Click the Save button after changes

Edit the email template

1. Open the app, click the Workflow link in the left menu
2. Click the hand icon of the **Email Template** column. Up hand icon is the approved email template, and down hand icon is the reject email template

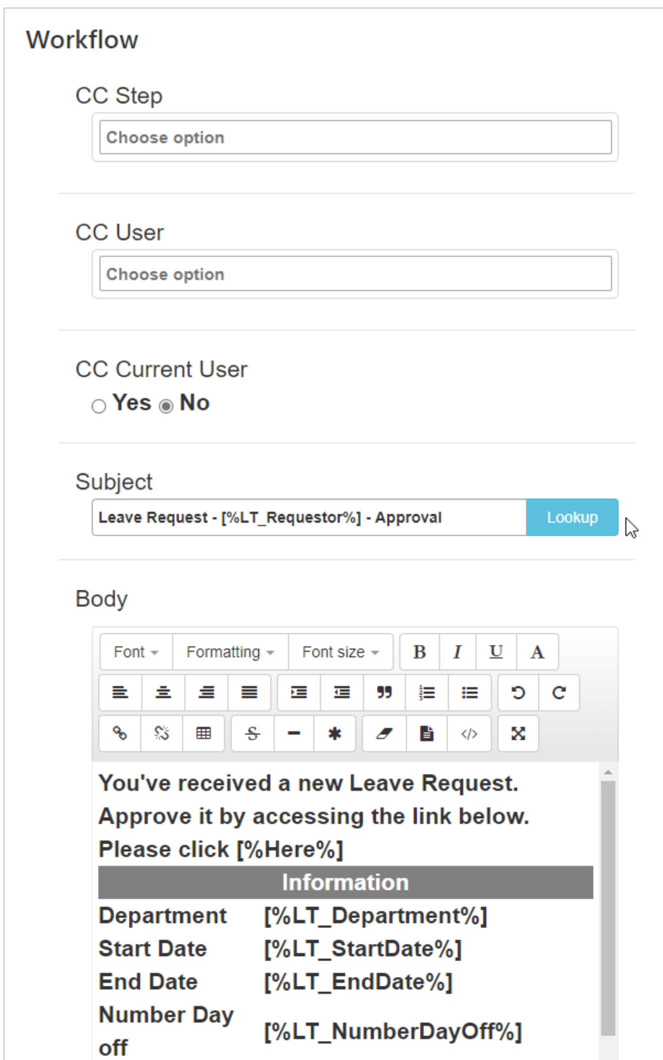


Edit	Title	Assign To	Select User	Next Step	Order	Active	Email Templates	Delete
	Requester		No	Manager	1	Yes		
	Manager	LTAPPS Support	No	Human resource	2	Yes		
	Human resource	LTAPPS Support	No	Finished	3	Yes		

3. In the popup appears, input all fields

- CC step: CC the user in the step when approving/rejecting the request

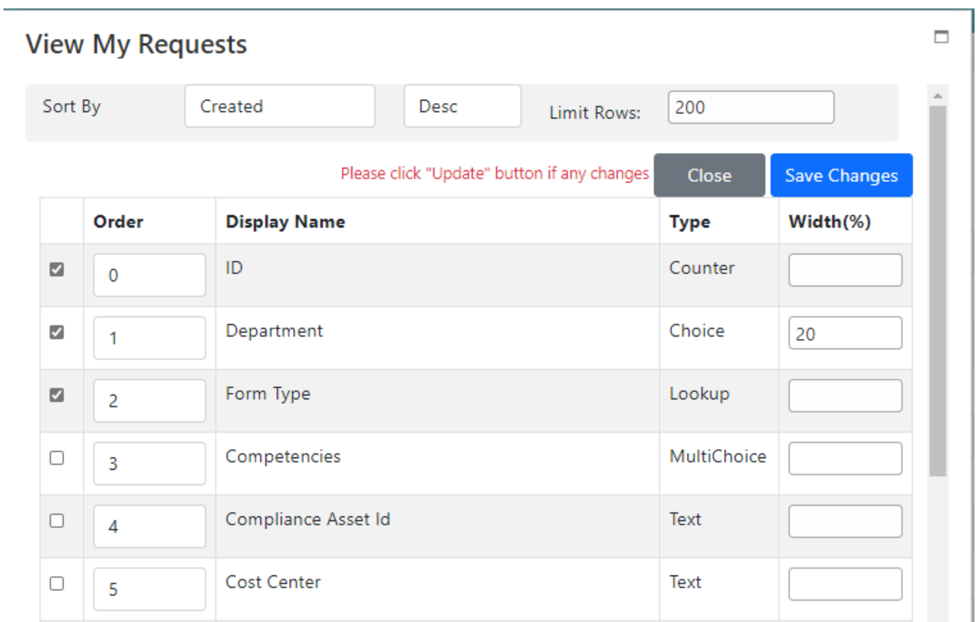
- CC User: CC the user when approving/rejecting the request
- CC Current User
    - If Yes, CC the current user when approving/rejecting the request
    - If No, don’t CC the current user when approving/rejecting the request
- Subject: Subject the email, can use the lookup field
- Body: Body the email, can use the lookup field



4. Click the **Save** button after changes

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 the page
    - **My Task & My Approval pages**: With this type, it allows display fields that have the number/text/date type
    - **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
    - **Search** page: With this type, it includes all abilities of the previous type and allows configuring the filter section
    - **Report** page: With this type, includes all abilities of the previous type and allows adding texts to the header of the report

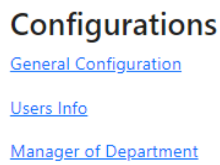


4. After completing all changes, click the **Save Changes** button

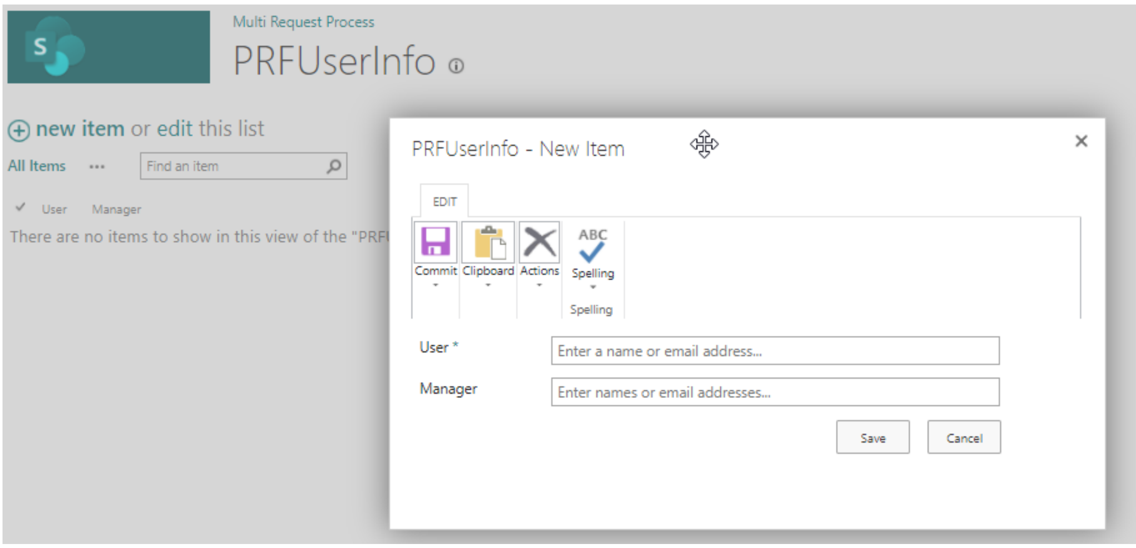
Set up the manager of the user or the department

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



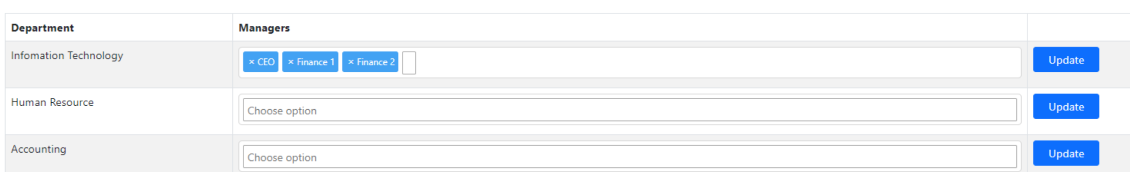
3. In the page appears, click the New item button
4. Input the user & manager fields



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

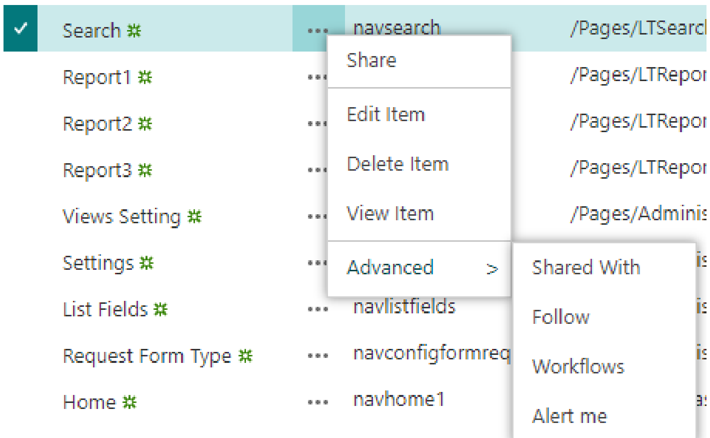


Set up the permission

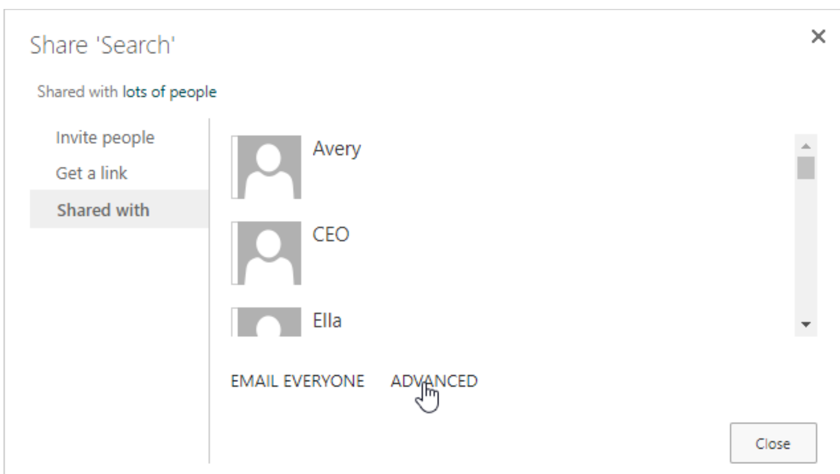
The permission of the add-in that based on the permission of items in the menu list. It means if the user doesn't have any permission to the report item in the menu list, he/she cannot see the report page. Follow the steps below to set it up

1. Click the **Settings** link in the left menu

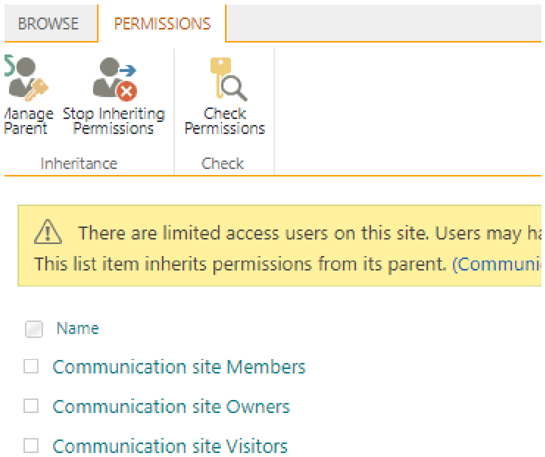
2. In the **Permission** zone, click the **Menu** link
3. In the menu list, select the **Search** item -> to click **Advanced -> Shared With** in the context menu



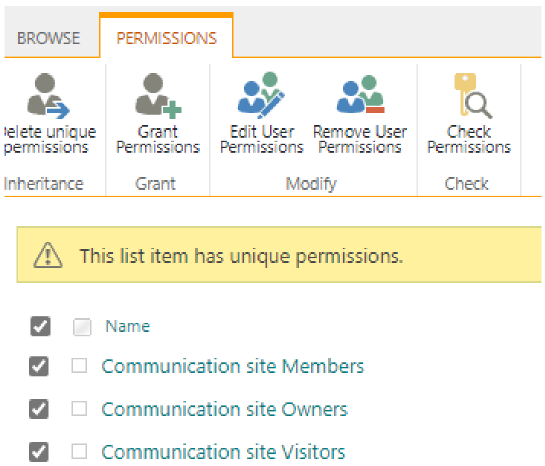
4. Click the **Advanced** button



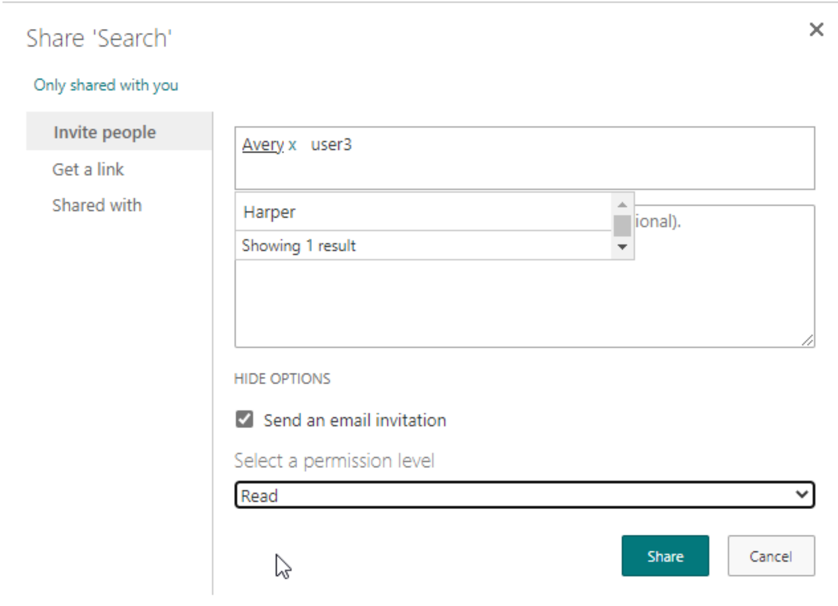
5. Click the Stop Inheriting Permissions icon on the ribbon



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



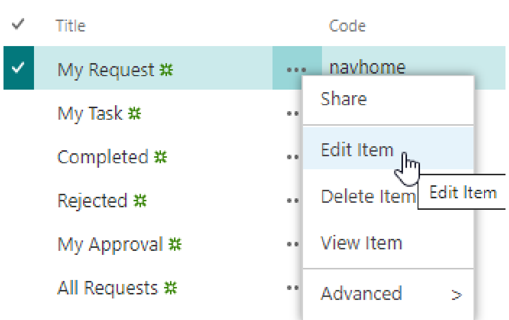
7. After that add the user who can see the **Search** page by clicking the **Grant Permissions** Icon then add the user with the Read permission



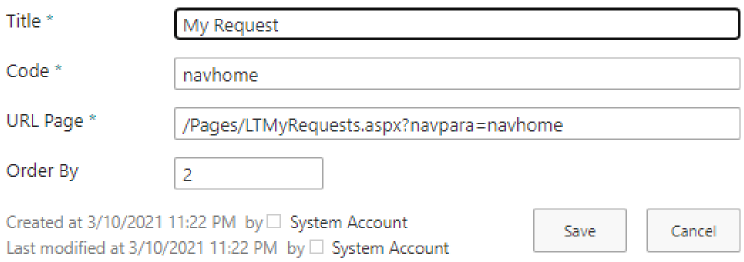
8. Click the **Share** button
9. Repeat all steps above to Pages (Report, settings page) that you want to change the permission

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

Setting up approval managers per department or user

There are 3 ways to set a manager for the user

1. Choosing the manager (Assign To)
2. Setting manager for the department
3. Setting manager for the user

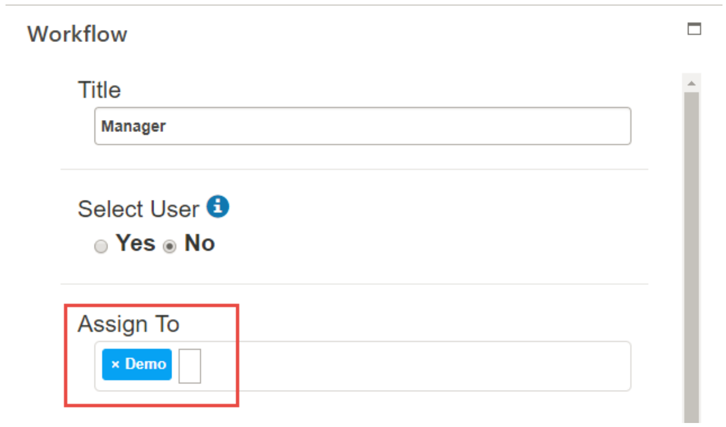
Choosing the manager (Assign To) when creating a new request

That way is the default way in the add-in. The configuration that goes to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Workflow"

That way has 2 options

1. Choosing the manager when creating a new form

2. Choosing the manager in the step of the workflow. With this option, the user doesn't need to choose the manager in the new form. The manager who set in the step will manage the user

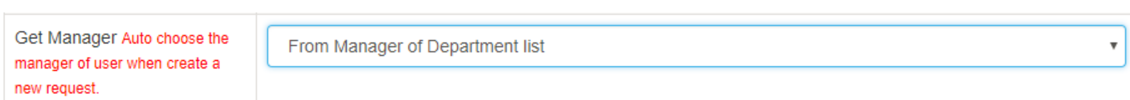


Setting manager for the department

The configuration has 2 steps

1. Going to the Manager of Department page (Settings->Manager of Department). Then add managers for each department's list

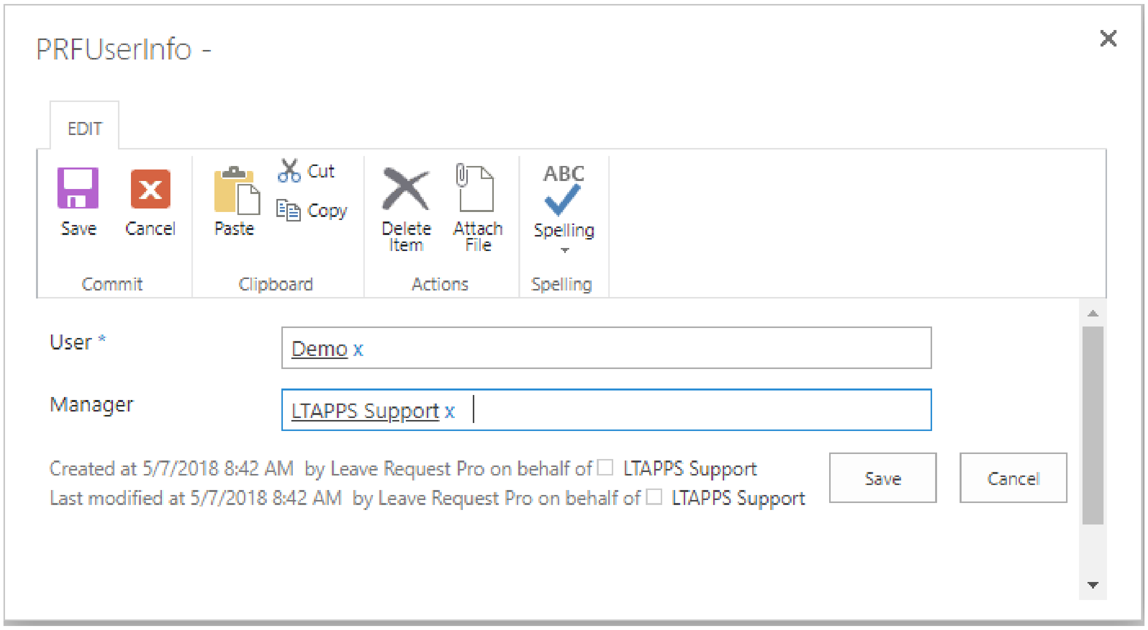
2. Going to the General Configuration page (Settings -> General Configuration) -> "Get manager" dropdown is "From Manager of Department List"



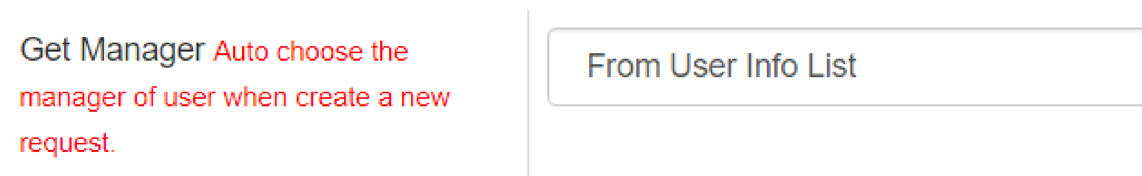
Setting manager for the user

The configuration has 2 steps

1. Going to the Manager of Department page (Settings->User). Then add the user and his/her manager



2. Going to the General Configuration page (Settings -> General Configuration) -> “Get manager” dropdown is “From User Info List”

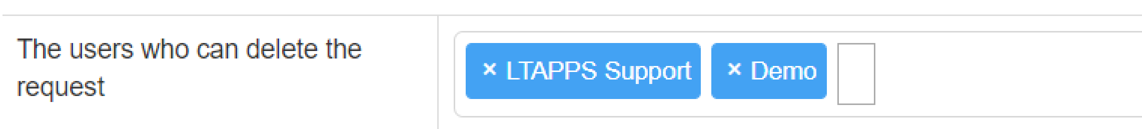


Allows the user who can delete the request

The configuration configures the rule which allows the user can delete the request after it is finished or not

That step has 2 child steps

1. Going to the General Configuration page (Settings -> General Configuration) ->Then add the user to the “The users who can delete the request” dropdown



2. Going to the Search page, then find the request which needs to delete -> click the Delete icon

View	Requestor	Department	Start Date	End Date	Number Day off	Reason	Stage	Status	Delete
	LTAPPS Support	Infomation Technology	05/07/2018 22:26	05/07/2018 22:26	1	Annual Leave	Human resource	Finished	
	LTAPPS Support	Infomation Technology	05/07/2018 22:30	05/07/2018 22:30	2	Sick Leave	Human resource	Finished	
	Demo	Infomation Technology	05/07/2018 22:38	05/07/2018 22:38	2	Annual Leave	Human resource	Finished	

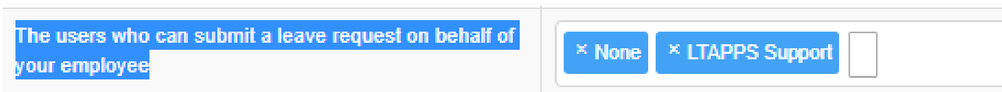
Showing 1 to 3 of 3 entries

First Previous 1 Next Last

The users who can submit a leave request on behalf of the employee

The configuration configures the rule which allows the users who can submit a leave request on behalf of the employee

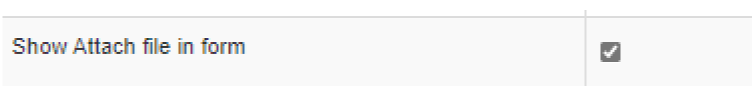
Going to the General Configuration page (Settings -> General Configuration) ->Then add the user to the "**The users who can submit a leave request on behalf of the employee**" dropdown



Attachment file in form (Medical document …)

The configuration allows attaching the medical document ... to form

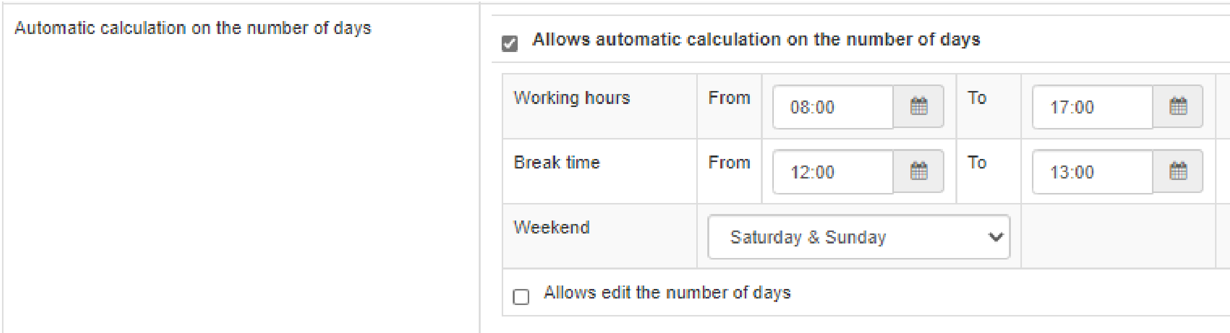
Going to the General Configuration page (Settings -> General Configuration) -> Check the "**Show Attach file in form**" checkbox



Automatic calculation of the number of days

The configuration allows automatic calculation of the number of days

Go to the General Configuration page (Settings -> General Configuration) and configures as the example image below. If allow editing the number of days in form, check the "edit the number of days in the form" checkbox



Fiscal Year

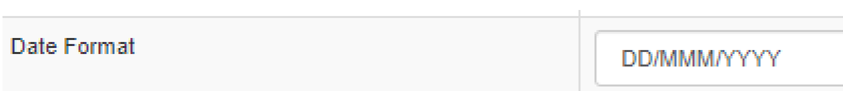
There are 2 options

- From January 1st to December 31st
- From April 1st to March 31st

Going to the General Configuration page (Settings -> General Configuration), the Fiscal Year dropdown

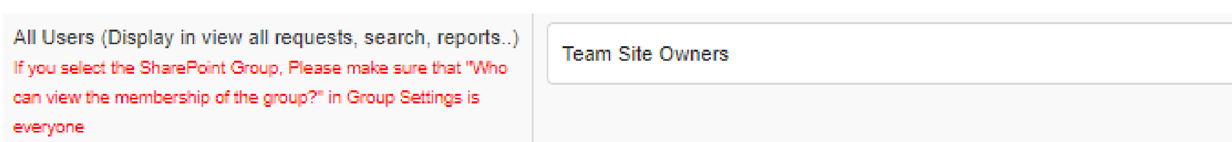
Date Format

Going to the General Configuration page (Settings -> General Configuration, Date Format dropdown



Restrict users display in the requester field

Going to the General Configuration page (Settings -> General Configuration, All Users dropdown



Integrations

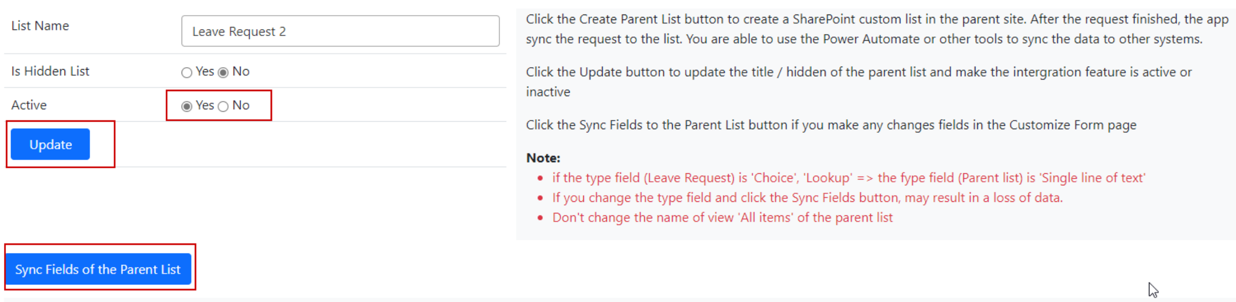
This feature allows the sync of the request to the SharePoint list in the parent site where the app is installed. After the request completed the process, the app syncs the request to the SharePoint list.

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 shows 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



Leave Request - Field Name	Leave Request - Field Type	Parent List - Field Name	Parent List - Field Type
Checkbox	Yes/No	Checkbox	Yes/No
Currentcy	Currency	Currentcy	Currency
Department 1	Choice	Department 1	Single line of text
Detail	Multiple lines of text	Detail	Multiple lines of text
DrowdownMulti	Choice	DrowdownMulti	Single line of text
End Date	Date and Time	End Date	Date and Time

Default view & field display in Calendar View

Going to the General Configuration page (Settings -> General Configuration

Calendar View Mode (Home View)	Month
Title of item in calendar (All Requests View)	Reason
Calendar View Mode (All Requests View)	Month

Translation

There are 3 locations

1. Left Menu
2. Fields in the form
3. Others (Calendar, Status, Step… fields)

Left Menu

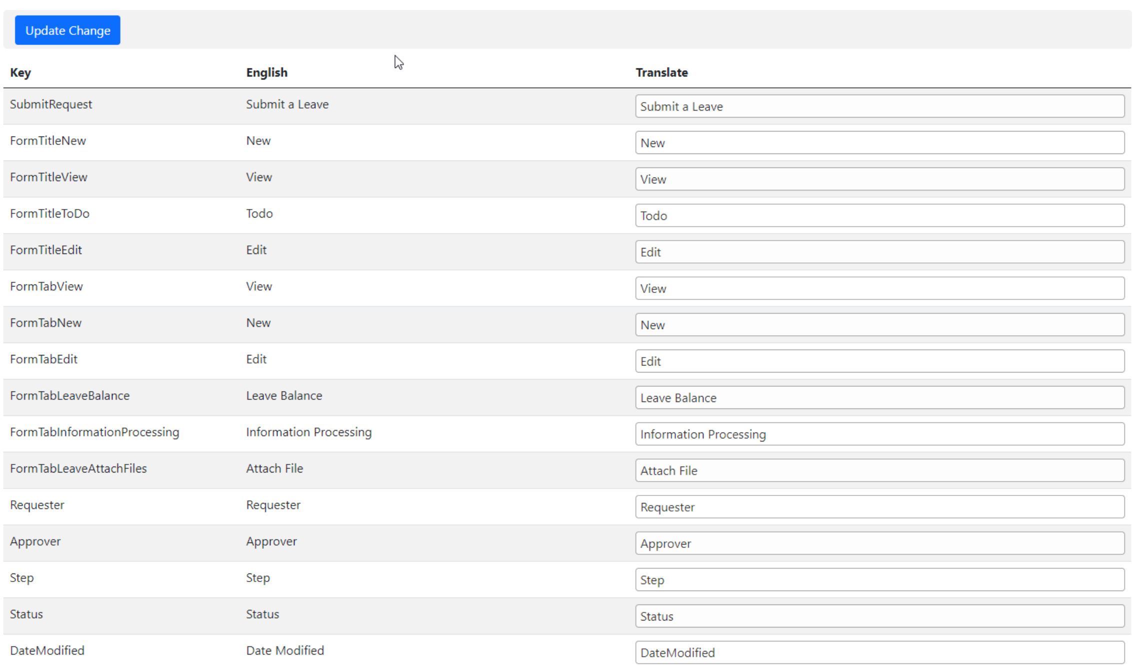
1. Open the app, click the **Setting** link in the left menu
2. Click the **Menu** link under the Permission section
3. Edit each item in the menu list & changes the **title** of the items

The field in the form

1. Open the app, click the **Customize Form** link in the left menu
2. Click the **edit icon** of the field
3. Changes the **title** of the field

Other (Calendar, Status, Step… fields)

1. Open the app, click the **Setting** link in the left menu
2. Click the **Translation** link under the Configurations section
3. On the page appears, changes the text in the Translate column


Update Change

Key	English	Translate
SubmitRequest	Submit a Leave	Submit a Leave
FormTitleNew	New	New
FormTitleView	View	View
FormTitleToDo	Todo	Todo
FormTitleEdit	Edit	Edit
FormTabView	View	View
FormTabNew	New	New
FormTabEdit	Edit	Edit
FormTabLeaveBalance	Leave Balance	Leave Balance
FormTabInformationProcessing	Information Processing	Information Processing
FormTabLeaveAttachFiles	Attach File	Attach File
Requester	Requester	Requester
Approver	Approver	Approver
Step	Step	Step
Status	Status	Status
DateModified	Date Modified	DateModified

4. Click the **Save Change** button after changes