LTAPPS Booking

Configuration Guide

Version 1.0

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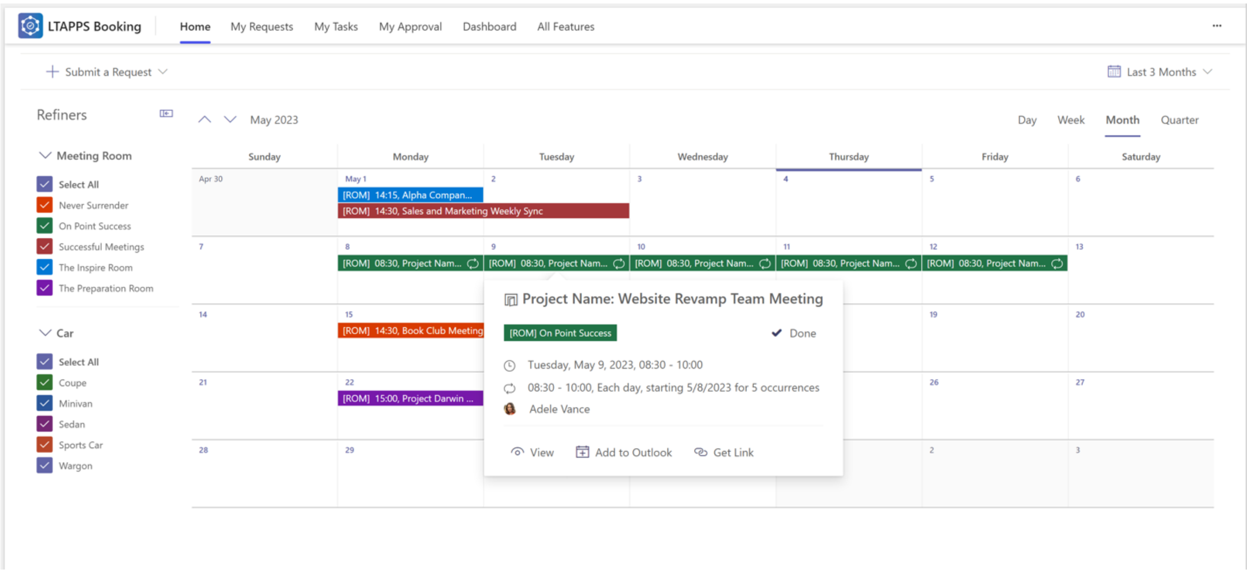
LTAPPS Booking

LTAPPS Booking is a software system that allows users to reserve and manage the booking requests

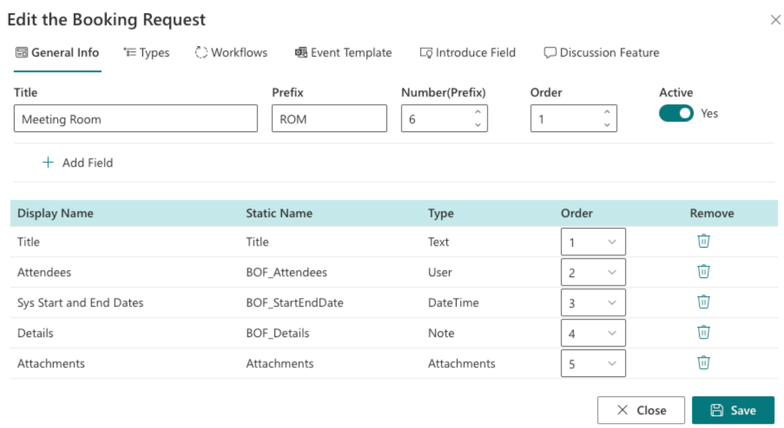
Overview

LTAPPS Booking is a software system that allows users to reserve and manage the booking requests such as meeting rooms in an office or vehicle. It can help optimize the use of space, avoid conflicts and double bookings, and improve the experience for employees and visitors.

Users can book via desktop, mobile, web app, or platforms such as O365 apps, SharePoint or Microsoft Teams. They can also see the availability and details of the rooms/vehicles on a calendar view.



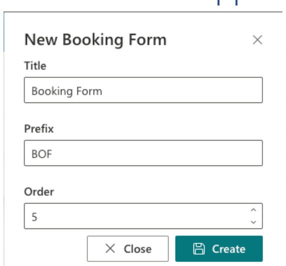
Request Form Types



This feature supports defines the approval process that includes:

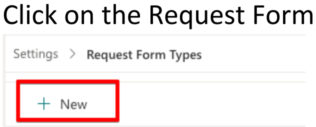
- Define the input form.
- Define the approval workflow.
- Email notifications template
- …

Create a new Approval Process



Follow the steps below:

- Open the app > click on the All Features button > Settings card.
- Click on the Request Form Type card. Then click on the New button.



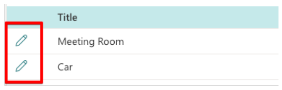
- Input:
  - Title: Name of the approval process
  - Prefix: The prefix for the auto number (ID)
  - Order: The position
- Click on the Create button.

Edit an Approval Process

General Info

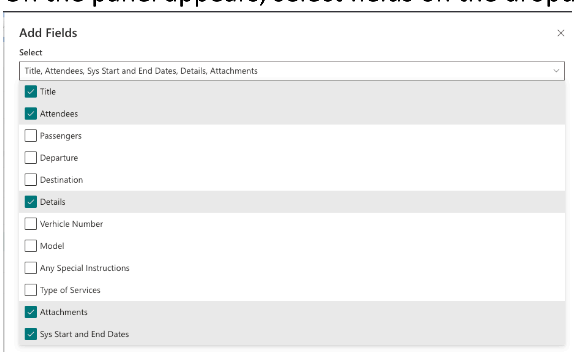
Follows the steps below:

- On the Request Form Types page, click on the edit icon of the Approval Process you want to edit.

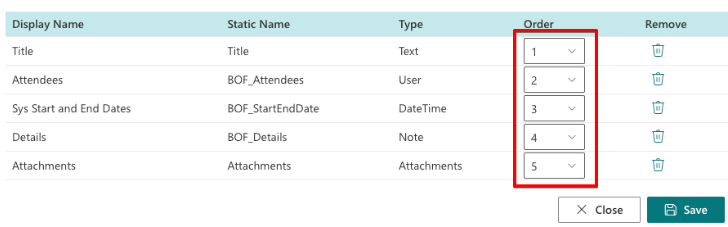


- On the General Info tab
    - Title: Name of the approval process
    - Prefix: The prefix for the auto number (ID)
    - Number: The number of the number after the prefix for the auto number (ID)
    - Order: The position
    - Active
- Click on the Add Field button to add more fields to the input form.

- On the panel appears, select fields on the dropdown & click on the Close button.



- On the Order column, select the position of the field displays on the input form.



- Click on the Delete icon on the Remove column to remove the field in the input form.
- Click on the Save button to save any changes.

Types

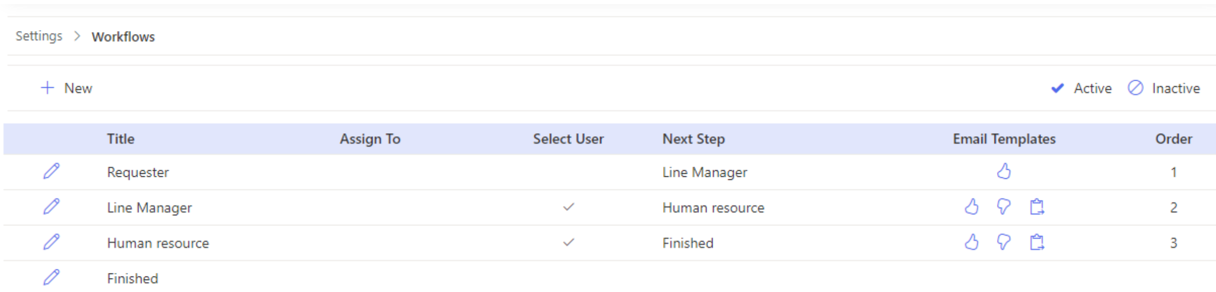
Follow the steps below:

- On the Edit the Booking Request page, switch to the Type tab
- Click on the New or Edit icon to add/edit the type
- On the Edit the Type page
    - Title: The name of the type
    - Prefix: The prefix of the type
    - Icon: The icon of the type
    - Color: The color
    - Description:

- Active:
- Order: The position of the type

- Click on the Save button for any changes

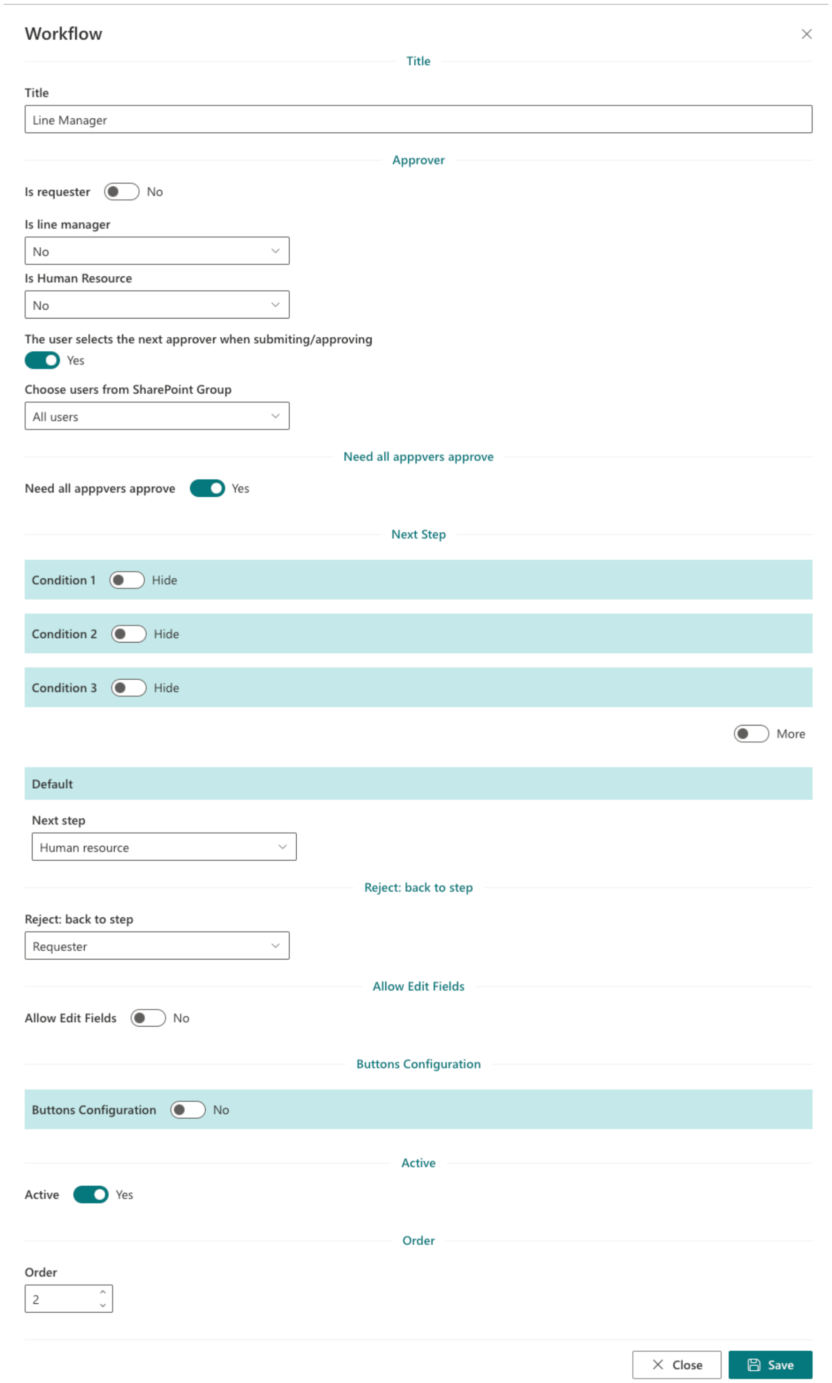
Workflows



The feature support set up the approval process for the approval process. With this feature, you can customize the approval process by adding/deleting the step. And you can also fork the process by conditions.

Follow the steps below

- On the Edit the Booking Request page, switch to the Workflows tab
- Add a new step, click on the New button



- Title: The step name
- In the Approver section, it has 4 options:
  - Is Requester: if select is Yes, the approver is the Requester who submitted the request
  - Is Line Manager:

- No: The app doesn't automatically get the manager. The end-user will choose the next approver.
- From the O365 Org Chart: The app automatics get the manager of the end-user who submits/approval the request from Active Directory
- From User Info List: The app automatics get the manager who has been configured on the Employees List
- From Manager of Department: The app automatics get the manager who has been configured in the Departments list

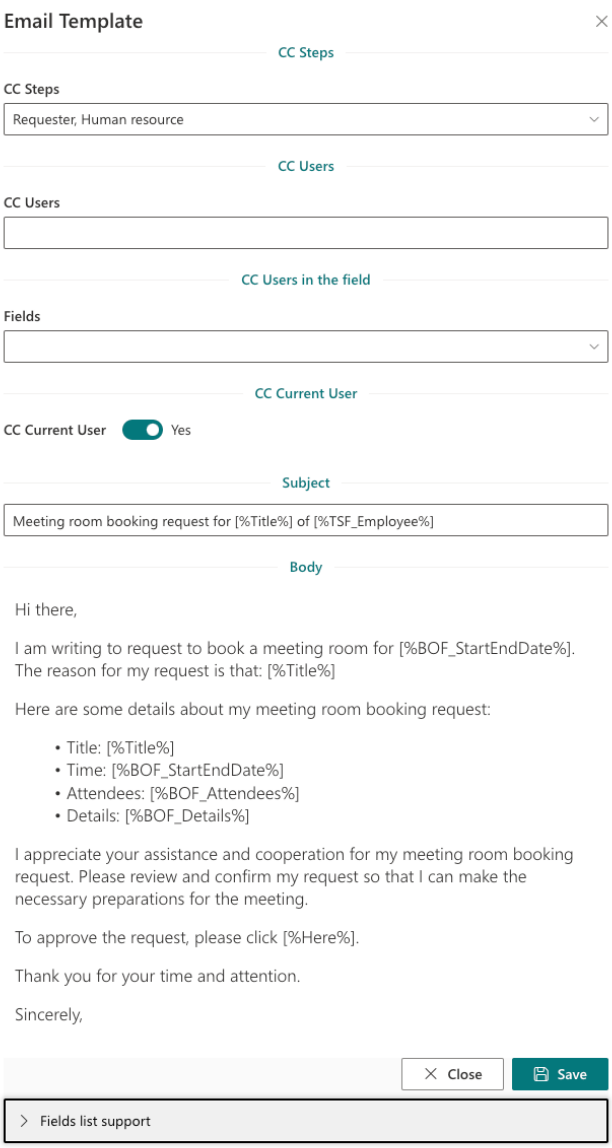
- Is Human Resources:
  - No: The app doesn't automatically get the human resource. The end-user will choose the next approver
  - From User Info List: The app automatics get the human resource who has been configured on the Employees List
  - From Manager of Department: The app automatics get the human resource who has been configured in the Departments list
- The user selects the next approver when submitting/approving
  - Yes: The end-user will select the approver when submitting/ Approving the request
  - No: The app will get the approver. There are 2 options
    - The approver is a SharePoint group. Any member of this group can approve the request
    - The approver is/are the specific person

- Need all approvers to approve: The request was sent to 2 approvers.
  - Yes: Need 2 approvers to approve before the request sends to the approver of the next step
  - No: Need only an approver to approve before the request sends to the approver of the next step
- In the Next Step section, it has 11 options: 10 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 10 conditions, it will jump to the default next step

    - 3 conditions: The field name only displays fields that have the type: Number, Dropdown, Lookup, or Yes/No
    - 3 conditions: The next step only displays steps if the next step has:
        - Is requester
        - Is manager
        - Is human resource
        - The user selects the next approver when submitting/approving: No
  - In the Reject: back to the step section, this is the step if the approver clicks the reject button
  - 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
  - Active section: Don't use the step
- Click on the Save button for any changes

Notification Email Templates



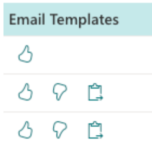
The feature support editing the notification email template when submitting/approving/delegating the request.

There are 3 types:

- Submit/Approve:
- Reject
- Delegate

Follow the steps below:

- On the workflow tab, click on the icon of the email template you want to edit on the Email Template column

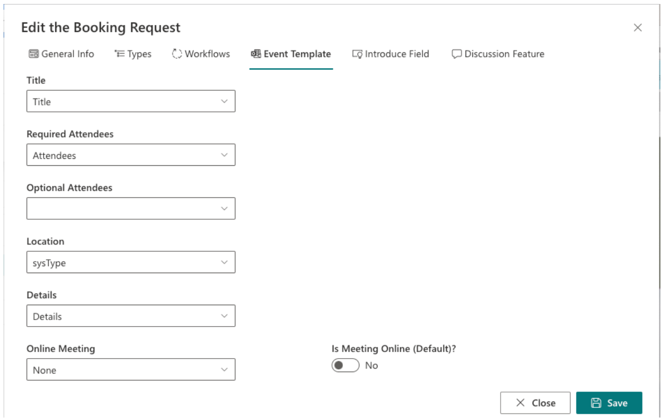


- In the form appearing
    - CC Steps: CC the person who is the approver of the step
    - CC Users: The users
    - CC Fields: CC the users in the field (People field)
    - CC Current User:
        - Yes: CC the current user who submitting the request
        - No: Don't add the current user to CC
    - Subject: Refer to the field list support to add the value of the field to the email
    - Body: Refer to the field list support to add the value of the field to the email
- Fields list support

#	Static Name	Title
1	[%ID%]	ID
2	[%Here%]	Here
3	[%TSF_Employee%]	Employee
4	[%TSF_Department%]	Department
5	[%BOF_StartEndDate%]	From To Date
6	[%TSF_Comment%]	Comment when approving the request
7	[%TSF_CommentOwner%]	The user who sent the message
8	[%TSF_CommentTime%]	The time when the message sent
9	[%BOF_Attendees%]	Attendees
10	[%BOF_Passengers%]	Passengers
11	[%BOF_Departure%]	Departure
12	[%BOF_Destination%]	Destination
13	[%BOF_Details%]	Details
14	[%BOF_VehicleNumber%]	Verhicle Number
15	[%BOF_Model%]	Model
16	[%BOF_AnySpecialInstructions%]	Any Special Instructions
17	[%BOF_TypeServices%]	Type of Services

- Note: if copy the field, please copy the field to the notepad first. After that copy it from the notepad to the Subject or body. This step is to remove all the HTML tags in the field.

Event Template

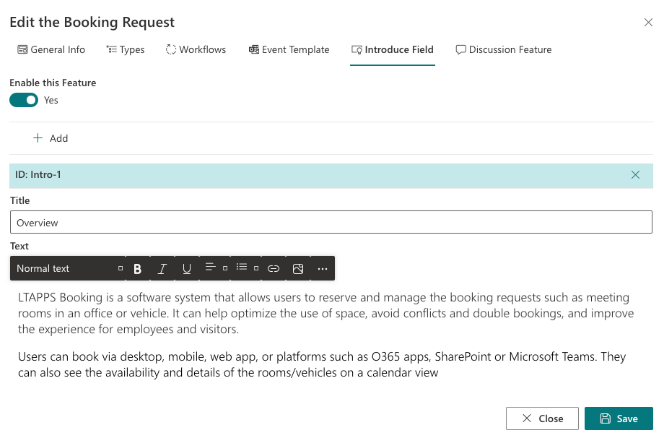


The feature defines the mapping fields between the request & Outlook Event or MS Teams Meeting.

Follows the steps below:

- Title: The title of the Outlook Event / MS Teams Meeting
- Required Attendant: The required attendant of the Outlook Event / MS Teams
- Optional Attendant: The optional attendant of the Outlook Event / MS Teams
- Location: The location of the Outlook Event / MS Teams
- Details: The details of the Outlook Event / MS Teams
- Online Meeting: This field is set the request is Outlook Event or it is both Outlook Event & MS Teams Meeting

Introduce Field

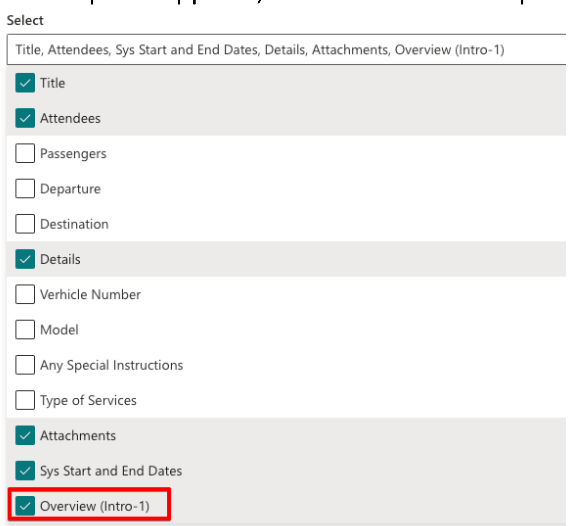


The feature support adding static text to the input form. The end-user cannot change the text in the field.

Follow below:

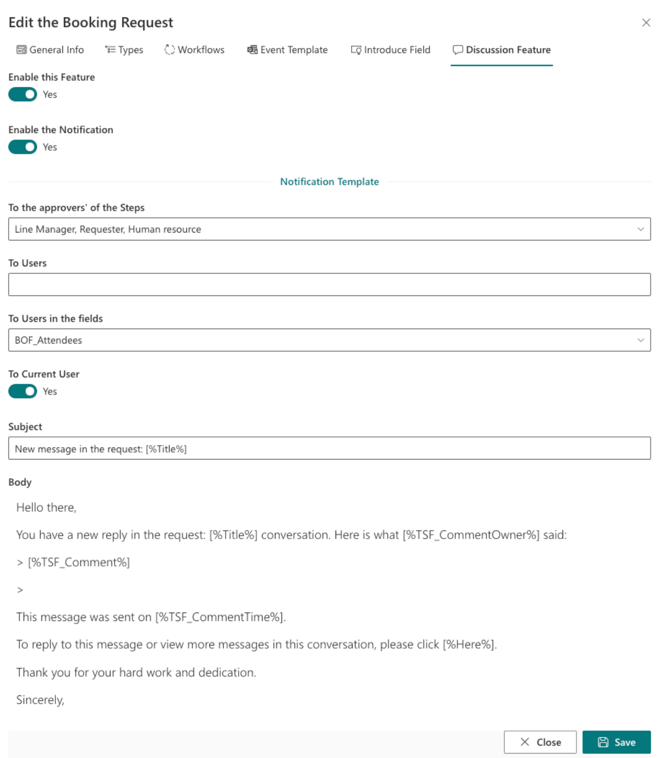
- Enable this feature: Enable/disable the feature
- Click on the Add button to add the field

- Input
  - ID: The ID of the field
  - Title: The title of the field
  - Text: The static text displays on the input form
- Click on the Save button for any changes
- Switch to the General Info tab, and click on the Add Field button
- On the panel appears, select the on the dropdown & click on the Close button.



- Use the order column to set where the field displays on the input form

Discuss Feature



The feature allows to engage in a dialogue with other people about a specific topic or question. It also allows notification when a comment is input.

Follow below:

- Enable this feature: Enable/disable this feature. It shows/hides the comment icon in the input form.
- Enable the Notification: Enable/disable the notification email when a comment is input.
- Notification Template. Please refer to the Notification Email Template above

Fields Setting

The feature supports customizing the booking form. With this feature, you can add/edit the field to the application.

Settings > Fields Setting

+ New Field   Update Configuration

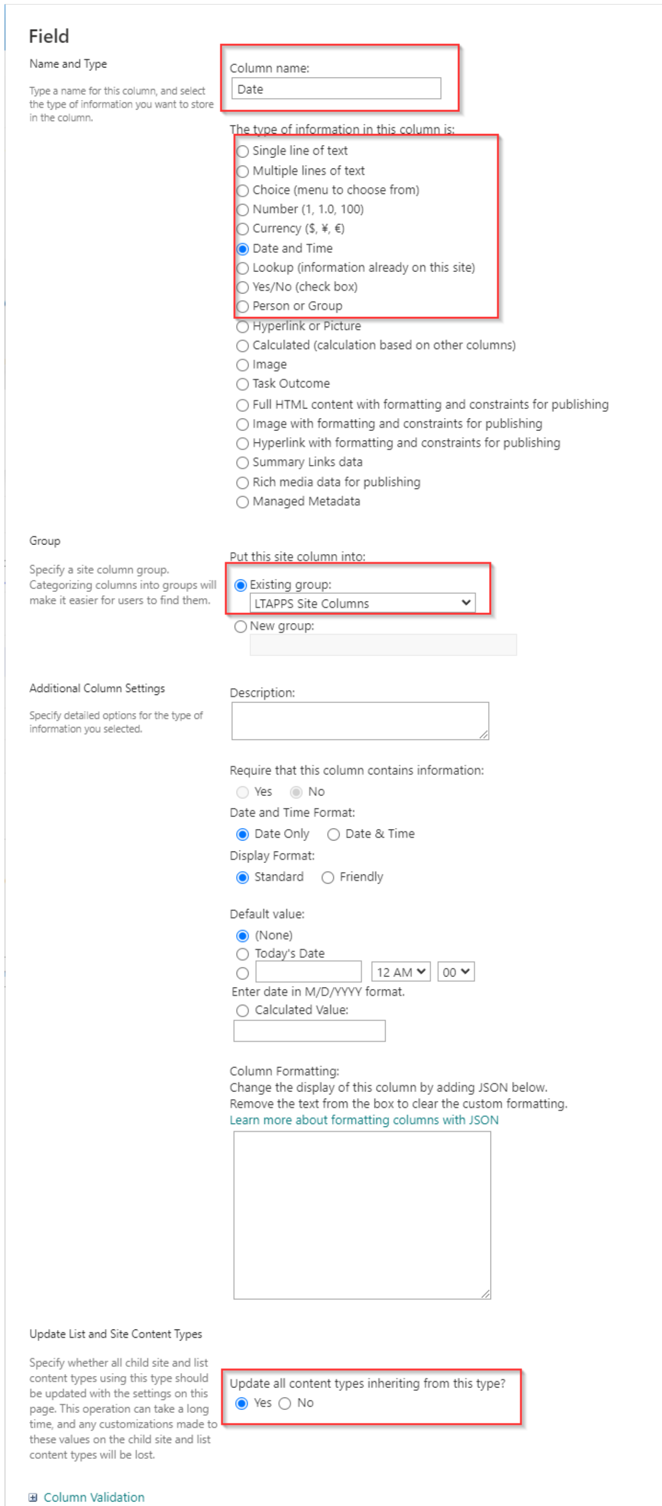
Edit	Display Name	Static Name	Type
	Attendees	BOF_Attendees	User
	Passengers	BOF_Passengers	User
	Departure	BOF_Departure	Lookup
	Destination	BOF_Destination	Lookup
	Details	BOF_Details	Note
	Verhicle Number	BOF_VehicleNumber	Text
	Model	BOF_Model	Text
	Any Special Instructions	BOF_AnySpecialInstructions	Note
	Type of Services	BOF_TypeServices	MultiChoice

Follow the steps below:

- Open the app, and click on the All Features button. Then click on the Settings section > Fields Setting
- Create a new field
    - Click on the New Field button

      + New Field   Update Configuration

    - In the panel appearing,



- Column Name: The field name, recommend you should use a simple name with only the alphabet & numbers, don't use any special characters. You can change the name in the edit form
- Type: The app supported the types

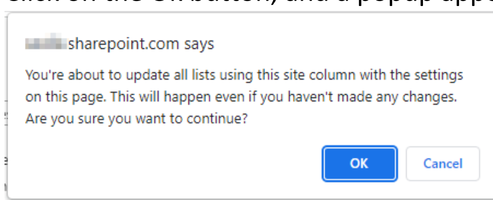
- Single line of text
- Multi line of text
- Choice
- Number
- Currency
- Date & Time
- Lookup
- Yes/No
- Person or Group

- Group: Select LTAPPS Site Column
- Update all content types inheriting from this type: Yes

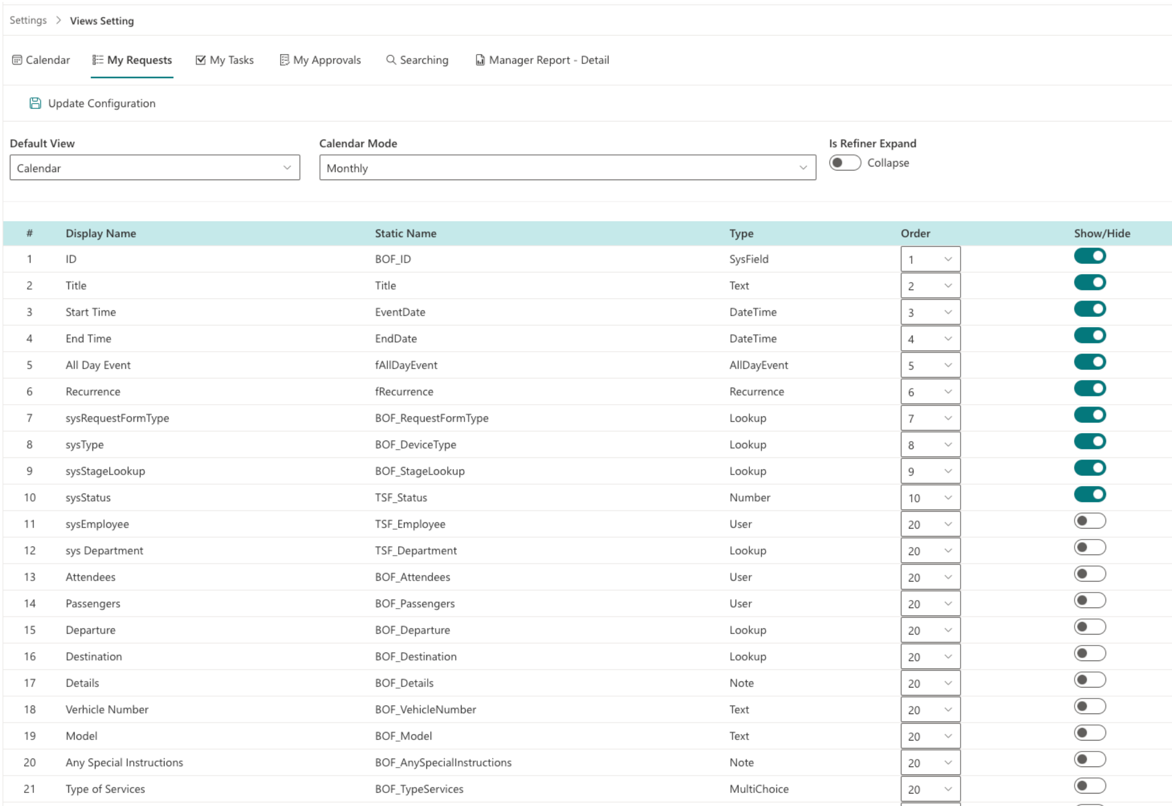
- Click on the Ok button
- The panel redirects to another page, ignore this page by closing the panel

- Edit the field
    - Click on the edit icon of the field you want to edit

    - In the panel appearing, edit the field
    - Click on the Ok button, and a popup appears to confirm. Click on the Ok button



Views Settings



#	Display Name	Static Name	Type	Order	Show/Hide
1	ID	BOF_ID	SysField	1	
2	Title	Title	Text	2	
3	Start Time	EventDate	DateTime	3	
4	End Time	EndDate	DateTime	4	
5	All Day Event	fAllDayEvent	AllDayEvent	5	
6	Recurrence	fRecurrence	Recurrence	6	
7	sysRequestFormType	BOF_RequestFormType	Lookup	7	
8	sysType	BOF_DeviceType	Lookup	8	
9	sysStageLookup	BOF_StageLookup	Lookup	9	
10	sysStatus	TSF_Status	Number	10	
11	sysEmployee	TSF_Employee	User	20	
12	sys Department	TSF_Department	Lookup	20	
13	Attendees	BOF_Attendees	User	20	
14	Passengers	BOF_Passengers	User	20	
15	Departure	BOF_Departure	Lookup	20	
16	Destination	BOF_Destination	Lookup	20	
17	Details	BOF_Details	Note	20	
18	Verhicle Number	BOF_VehicleNumber	Text	20	
19	Model	BOF_Model	Text	20	
20	Any Special Instructions	BOF_AnySpecialInstructions	Note	20	
21	Type of Services	BOF_TypeServices	MultiChoice	20	

The feature support customizing the view or report. With this feature, you can show/hide or order the field in the view,

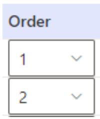
There are 6 views or reports you can custom:

- Calendar
- My Requests
- My Tasks
- My approvals
- Searching
- Manager Report - Details

Follow the steps below:

- Open the app, and click on the All Features button. Then click on the Settings section > Views Setting
- If the page has the calendar
  - Default View: The view loads first when open the page: Calendar view or List view
  - Calendar Mode: Quater/Monthly/Weekly/Daily
  - Is Refiner Expand: Expand/Collapse the Refiner tab of the Calendar view
- Show/hide the field: use the show/hide toggle

- Order: use the Order dropdown



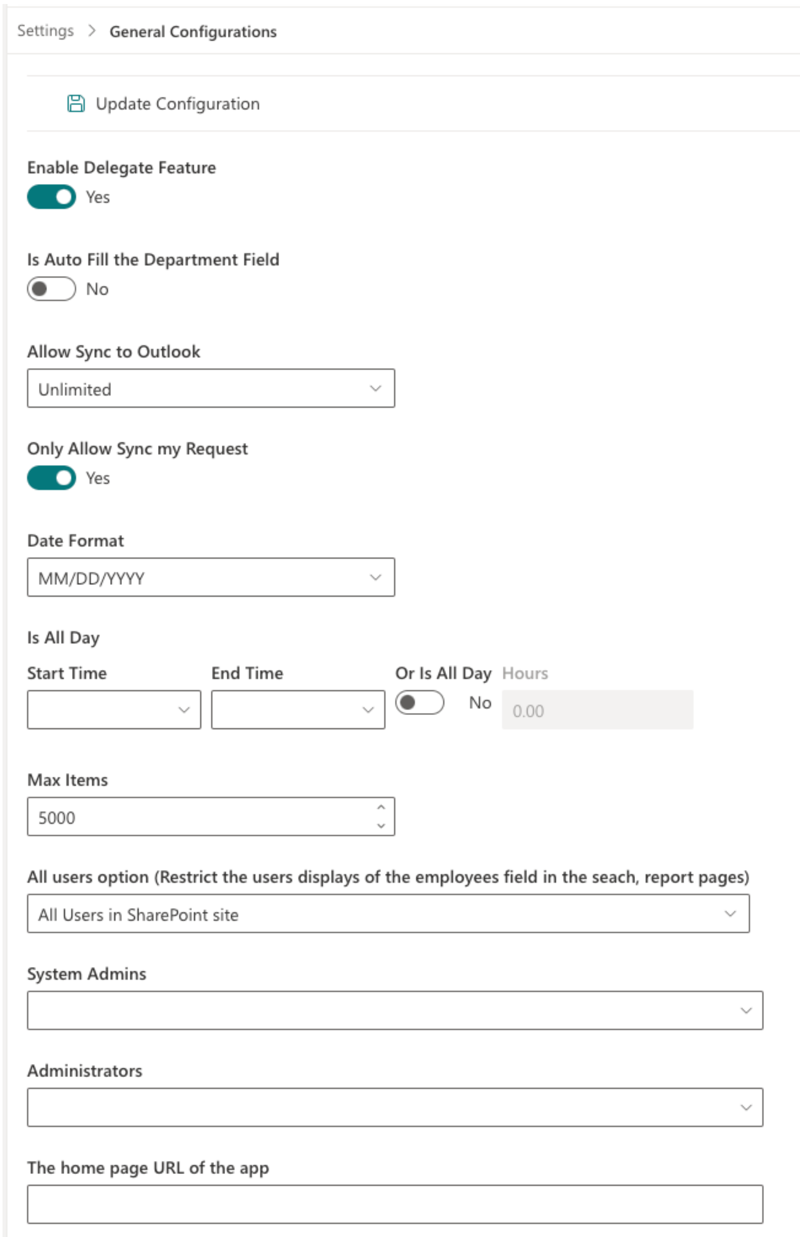
- Click on the Update Configuration to save any changes. Please refresh the page for changes to take effect.

Home page: Calendar filter

For the Home page, there is a configuration “Calendar Filter”. There are 3 options:

- **All Booking of All Users (Induce the pending request of the current user):** It means the home page displays all requests of all users and the pending request of the current user.
- **All Booking of Department (Induce the pending request of the current user):** It means the home page displays all requests of the department of the current user and the pending request of the current user.
- **The booking of the Current User:** It means the home page displays the requests of the current user

General Configurations



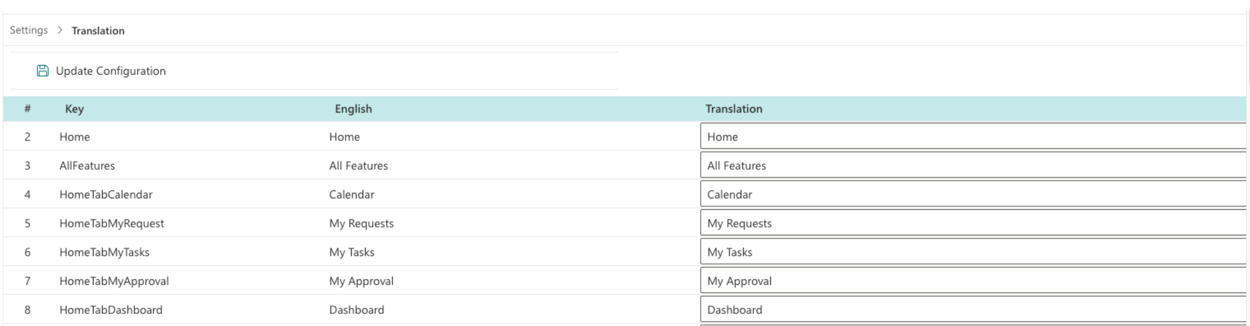
Follow the steps below:

- Open the app, and click on the All Features button. Then click on the Settings section > General Configuration
- Configurations
  - Enable Delegate Feature: If yes, the delegate button will display when the approver approves the request
  - Is Auto Fill the Department Field: If it is enable, the app automatically set the department of the end-user when submitting the request. The end-user cannot edit. The department gets from the employee's list or Active Directory.

- Allow Sync to Outlook:
    - No: Cannot sync the request to the Outlook
    - One time: Only sync the request one time.
    - Unlimited
- Only Allow Sync My Request: Only the requester can sync or all
- Date Format
- Is All Day: Configure the number of hours when the end-user selects the option “Is All Day” when submitting the request
- Max items: the setting to improve the performance.
- All user options: Restrict the user’s displays of the employee’s field in the search/report pages
- System Admin: By default, if the user has full control permission in the SharePoint where the app is installed => the user is a System, Admin. This setting allows adding more
- Administrator: the user who is the administrator
- SharePoint site URL: This setting only displays on MS Teams/O365 Apps, it allows to change the SharePoint site where the app on MS Team/O365 app is linked.
- The home page URL of the app: The URL of the SharePoint page where the web part is added. This configuration requires if you use the app on MS Teams/O365 Apps

- Click on the Update Configuration to save any changes. Please refresh the page for changes to take effect.

Translations



Settings > Translation

Update Configuration

#	Key	English	Translation
2	Home	Home	Home
3	AllFeatures	All Features	All Features
4	HomeTabCalendar	Calendar	Calendar
5	HomeTabMyRequest	My Requests	My Requests
6	HomeTabMyTasks	My Tasks	My Tasks
7	HomeTabMyApproval	My Approval	My Approval
8	HomeTabDashboard	Dashboard	Dashboard

The feature support translating English to another language.

Follow the steps below:

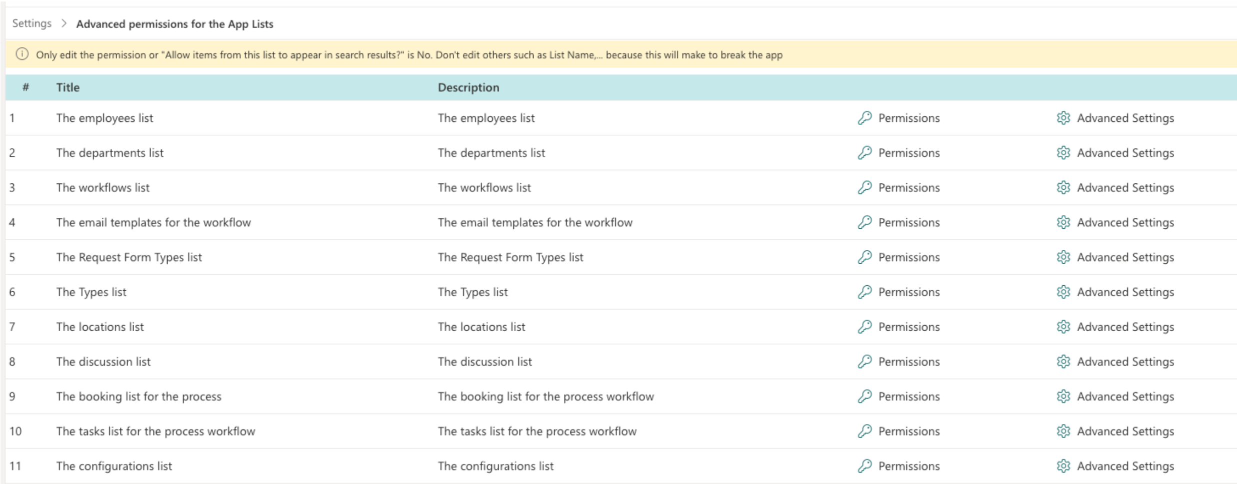
- Open the app, and click on the All Features button. Then click on the Settings section > Translation
- Translate the text
- Click on the Save button to save any changes. Please refresh the page for changes to take effect

Note: Some texts on the 2 special char: “{}” or the special text: “N” **should not** change or remove. E.g.

- On the **{0}** of each month
- On the **{0}** of every **{1}** months

- End after **{count}** occurence(s)
- every **N** days
- every **N** weeks

Advance Permissions



Settings > Advanced permissions for the App Lists

Only edit the permission or "Allow items from this list to appear in search results?" is No. Don't edit others such as List Name,... because this will make to break the app

#	Title	Description		
1	The employees list	The employees list	Permissions	Advanced Settings
2	The departments list	The departments list	Permissions	Advanced Settings
3	The workflows list	The workflows list	Permissions	Advanced Settings
4	The email templates for the workflow	The email templates for the workflow	Permissions	Advanced Settings
5	The Request Form Types list	The Request Form Types list	Permissions	Advanced Settings
6	The Types list	The Types list	Permissions	Advanced Settings
7	The locations list	The locations list	Permissions	Advanced Settings
8	The discussion list	The discussion list	Permissions	Advanced Settings
9	The booking list for the process	The booking list for the process workflow	Permissions	Advanced Settings
10	The tasks list for the process workflow	The tasks list for the process workflow	Permissions	Advanced Settings
11	The configurations list	The configurations list	Permissions	Advanced Settings

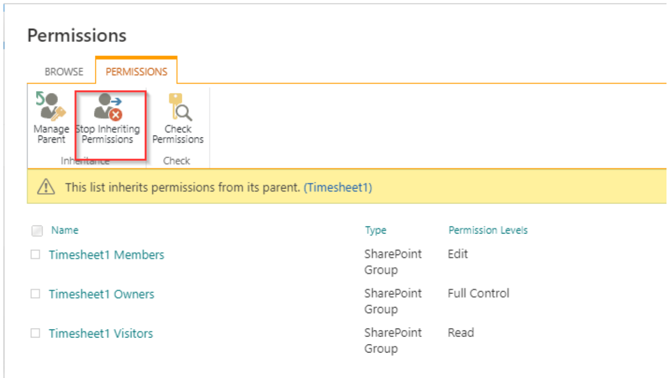
By default, the user only needs contributor permission on the SharePoint site where the app is installed => the user can use the app

If you want to the app be more secure, you can reset the permission for each SharePoint list where the app stores the data. You should set

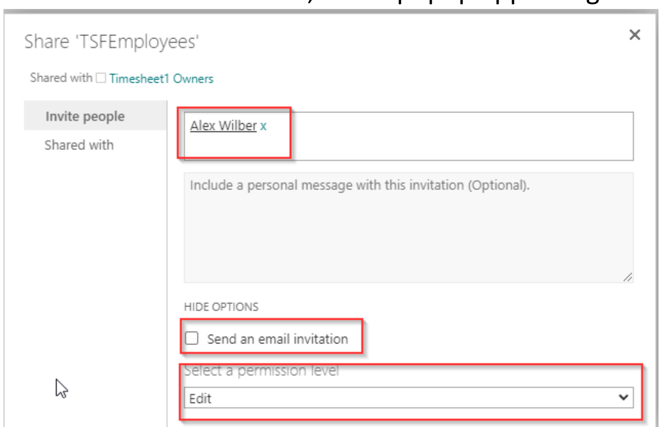
#	List	Normal user	Manager	Human Resource	Administrator	System Admin
1	The Employee List	Read	Read	Read	Contribute	Full Control
2	The department list	Read	Read	Read	Contribute	Full Control
3	The location list	Read	Read	Read	Contribute	Full Control
4	The types list	Read	Read	Read	Contribute	Full Control
5	The discussion	Contribute	Contribute	Contribute	Contribute	Full Control
6	The workflows list	Read	Read	Read	Contribute	Full Control
7	The Request Form Type	Read	Read	Read	Contribute	Full Control
8	The email templates	Read	Read	Read	Contribute	Full Control
9	The booking list for the process	Contribute	Contribute	Contribute	Contribute	Full Control
10	The tasks list for the process workflow	Contribute	Contribute	Contribute	Contribute	Full Control
11	The configurations list	Read	Read	Read	Read	Full Control

To reset the permission for each SharePoint list, follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Advanced permissions for the app lists
- Click on the key icon of the Permission
- In the panel appearing, click on the Stop Inheriting Permissions in the ribbon



- Select all permissions & click on the Remove User Permissions in the ribbon
- Click on Grant Permission, in the popup appearing

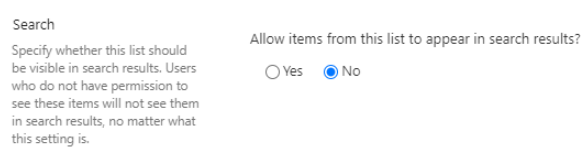


- Add permissions as in the table above. Then click on the Share button

Turn off the recent activity

Something the Recent Activity web part shows the request items. To turn off this, follow the steps below

- Open the app, and click on the All Features button. Then click on the Settings section > Advanced permissions for the app lists
- Click on the setting icon of the Advanced Settings
- In the panel appearing, choose "Allow items from this list to appear in search results?" is No in the Search section



- Click on the Ok button