



# LTAPPS Booking

## Configuration Guide

Version 1.0

## Table of Contents

Overview .....	3
Request Form Types .....	4
Create a new Approval Process .....	4
Edit an Approval Process .....	4
General Info .....	4
Types .....	5
Workflows .....	6
Notification Email Templates .....	10
Event Template .....	12
Introduce Field .....	12
Discuss Feature .....	14
Fields Setting .....	14
Views Settings .....	18
General Configurations .....	20
Translations .....	21
Advance Permissions .....	22
Turn off the recent activity .....	23

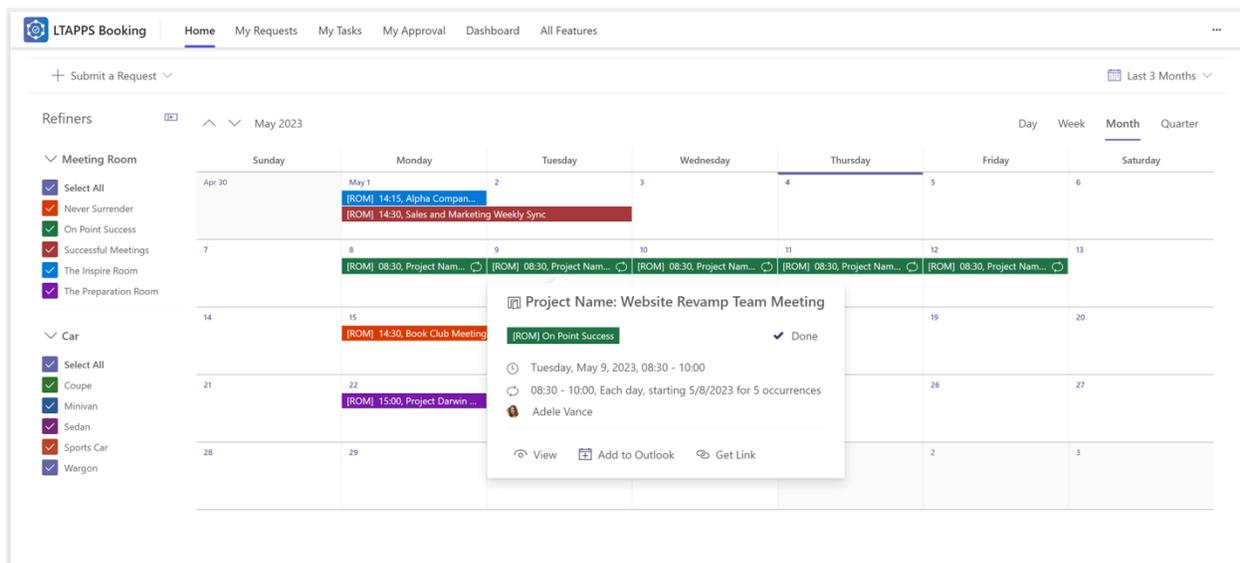
# LTAPPS Booking

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.



The screenshot displays the LTAPPS Booking web interface. At the top, there is a navigation menu with 'Home', 'My Requests', 'My Tasks', 'My Approval', 'Dashboard', and 'All Features'. Below the navigation is a 'Submit a Request' button and a date range selector set to 'Last 3 Months'. The main area shows a calendar for May 2023. On the left, there are 'Refiners' for 'Meeting Room' and 'Car'. The 'Meeting Room' refiners include 'Select All', 'Never Surrender', 'On Point Success', 'Successful Meetings', 'The Inspire Room', and 'The Preparation Room'. The 'Car' refiners include 'Select All', 'Coupe', 'Minivan', 'Sedan', 'Sports Car', and 'Wagon'. The calendar shows several bookings. A pop-up window is open over a booking on Tuesday, May 9, 2023, from 08:30 to 10:00. The pop-up title is 'Project Name: Website Revamp Team Meeting'. It shows the date and time, a checkmark for 'Done', and the name 'Adele Vance'. At the bottom of the pop-up, there are three options: 'View', 'Add to Outlook', and 'Get Link'.

## Request Form Types

**Edit the Booking Request** ×

General Info
Types
Workflows
Event Template
Introduce Field
Discussion Feature

Title: 
 Prefix: 
 Number(Prefix): 
 Order: 
 Active:  Yes

[+ Add Field](#)

Display Name	Static Name	Type	Order	Remove
Title	Title	Text	1	
Attendees	BOF_Attendees	User	2	
Sys Start and End Dates	BOF_StartEndDate	DateTime	3	
Details	BOF_Details	Note	4	
Attachments	Attachments	Attachments	5	

Close
Save

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

**New Booking Form** ×

Title:

Prefix:

Order:

Close
Create

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:

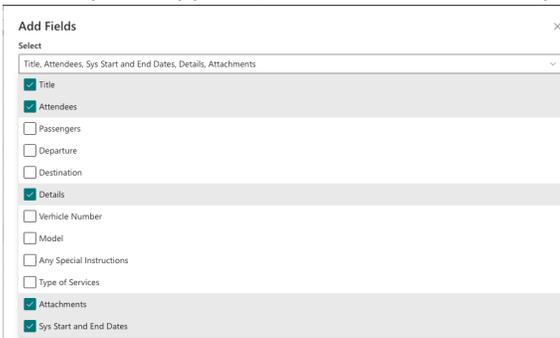
- On the Request Form Types page, click on the edit icon of the Approval Process you want to edit.



- 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.

Display Name	Static Name	Type	Order	Remove
Title	Title	Text	1	
Attendees	BOF_Attendees	User	2	
Sys Start and End Dates	BOF_StartEndDate	DateTime	3	
Details	BOF_Details	Note	4	
Attachments	Attachments	Attachments	5	

- 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

Settings > Workflows

+ New ✓ Active ○ Inactive

	Title	Assign To	Select User	Next Step	Email Templates	Order
	Requester			Line Manager		1
	Line Manager		✓	Human resource	  	2
	Human resource		✓	Finished	  	3
	Finished					

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

**Workflow** ×

---

Title

Title

---

Approver

Is requester  No

Is line manager

Is Human Resource

The user selects the next approver when submitting/approving  
 Yes

Choose users from SharePoint Group

---

Need all apppers approve

Need all apppers approve  Yes

---

Next Step

Condition 1  Hide

Condition 2  Hide

Condition 3  Hide

More

Default

Next step

---

Reject: back to step

Reject: back to step

---

Allow Edit Fields

Allow Edit Fields  No

---

Buttons Configuration

Buttons Configuration  No

---

Active

Active  Yes

---

Order

Order

---

- 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 automatically get the manager of the end-user who submits/approval the request from Active Directory
- From User Info List: The app automatically get the manager who has been configured on the Employees List
- From Manager of Department: The app automatically 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 automatically get the human resource who has been configured on the Employees List
  - From Manager of Department: The app automatically 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

### Email Template

CC Steps

Requester, Human resource

CC Users

CC Users in the field

Fields

CC Current User  Yes

Subject

Meeting room booking request for [%Title%] of [%TSF\_Employee%]

Body

Hi there,

I am writing to request to book a meeting room for [%BOF\_StartEndDate%].  
The reason for my request is that: [%Title%]

Here are some details about my meeting room booking request:

- Title: [%Title%]
- Time: [%BOF\_StartEndDate%]
- Attendees: [%BOF\_Attendees%]
- Details: [%BOF\_Details%]

I appreciate your assistance and cooperation for my meeting room booking request. Please review and confirm my request so that I can make the necessary preparations for the meeting.

To approve the request, please click [%Here%].

Thank you for your time and attention.

Sincerely,

> Fields list support

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

**Email Templates**



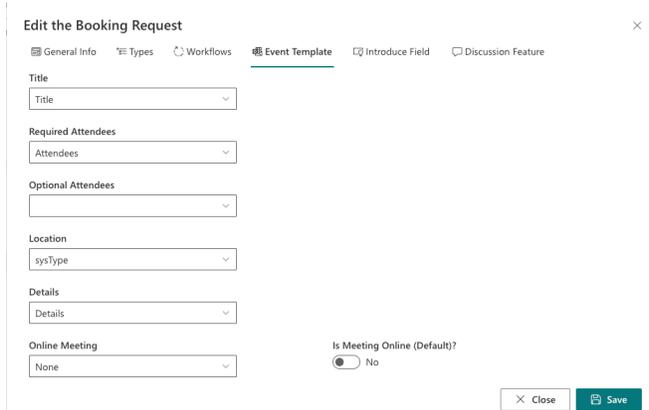
- In the form appearing
  - CC Steps: CC the person who is the approver of the step
  - CC Users: The users
  - CC Fields: CC the users in the field (People field)
  - CC Current User:
    - Yes: CC the current user who submitting the request
    - No: Don't add the current user to CC
  - Subject: Refer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

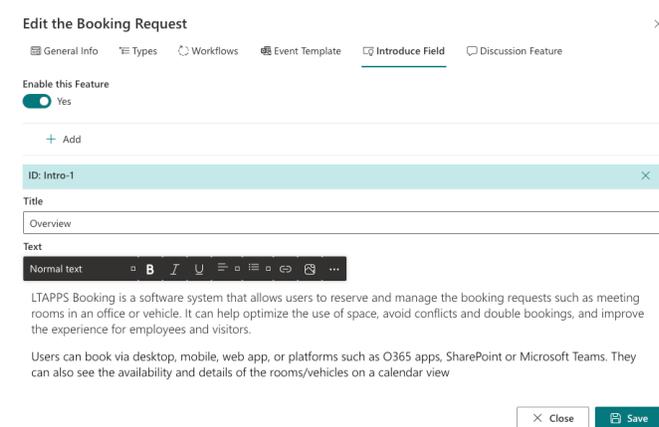


The feature defines the mapping fields between the request & Outlook Event or MS Teams Meeting.

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

+ Add

- **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.

Select

Title, Attendees, Sys Start and End Dates, Details, Attachments, Overview (Intro-1)

<input checked="" type="checkbox"/>	Title
<input checked="" type="checkbox"/>	Attendees
<input type="checkbox"/>	Passengers
<input type="checkbox"/>	Departure
<input type="checkbox"/>	Destination
<input checked="" type="checkbox"/>	Details
<input type="checkbox"/>	Vehicle Number
<input type="checkbox"/>	Model
<input type="checkbox"/>	Any Special Instructions
<input type="checkbox"/>	Type of Services
<input checked="" type="checkbox"/>	Attachments
<input checked="" type="checkbox"/>	Sys Start and End Dates
<input checked="" type="checkbox"/>	Overview (Intro-1)

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

## Discuss Feature

### Edit the Booking Request

General Info | Types | Workflows | Event Template | Introduce Field | **Discussion Feature**

**Enable this Feature**  
 Yes

**Enable the Notification**  
 Yes

**Notification Template**

To the approvers' of the Steps  
Line Manager, Requester, Human resource

To Users  
[Empty field]

To Users in the fields  
BOF\_Attendees

To Current User  
 Yes

**Subject**  
New message in the request: [%Title%]

**Body**  
Hello there,  
You have a new reply in the request: [%Title%] conversation. Here is what [%TSF\_CommentOwner%] said:  
> [%TSF\_Comment%]  
>  
This message was sent on [%TSF\_CommentTime%].  
To reply to this message or view more messages in this conversation, please click [%Here%].  
Thank you for your hard work and dedication.  
Sincerely,

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.

+ 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  

  - In the panel appearing,

## Field

### 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)
- Image
- Task Outcome
- Full HTML content with formatting and constraints for publishing
- Image with formatting and constraints for publishing
- Hyperlink with formatting and constraints for publishing
- Summary Links data
- Rich media data for publishing
- Managed Metadata

### Group

Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:  
 Existing group:  
  
 New group:

### Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

Yes  No

Date and Time Format:

Date Only  Date & Time

Display Format:

Standard  Friendly

Default value:

(None)

Today's Date

Enter date in M/D/YYYY format.

Calculated Value:

Column Formatting:

Change the display of this column by adding JSON below. Remove the text from the box to clear the custom formatting. [Learn more about formatting columns with JSON](#)

### Update List and Site Content Types

Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to these values on the child site and list content types will be lost.

Update all content types inheriting from this type?  
 Yes  No

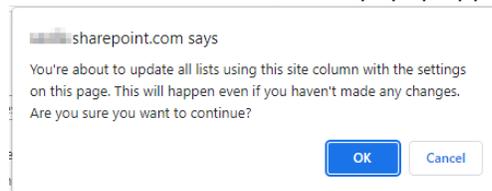
### Column Validation

- **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

Settings > Views Setting

[Calendar](#)
[My Requests](#)
[My Tasks](#)
[My Approvals](#)
[Searching](#)
[Manager Report - Detail](#)

[Update Configuration](#)

Default View: 
 Calendar Mode: 
 Is Refiner Expand:  Collapse

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

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

Show/Hide

- Order: use the Order dropdown

Order

1 ▾

2 ▾

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

 Update Configuration

### 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

Settings > General Configurations

---

 Update Configuration

---

**Enable Delegate Feature**  
 Yes

**Is Auto Fill the Department Field**  
 No

**Allow Sync to Outlook**  
Unlimited

**Only Allow Sync my Request**  
 Yes

**Date Format**  
MM/DD/YYYY

**Is All Day**  
Start Time:  End Time:  Or Is All Day:  No  Hours

**Max Items**  
5000

**All users option (Restrict the users displays of the employees field in the search, report pages)**  
All Users in SharePoint site

**System Admins**

**Administrators**

**The home page URL of the app**

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}** occurrence(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	Permissions	Advanced Settings
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

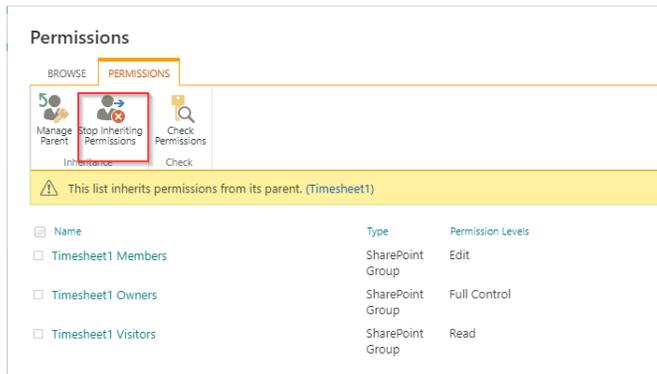
By default, the user only needs contributor permission on the SharePoint site where the app is installed => the user can use the app

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

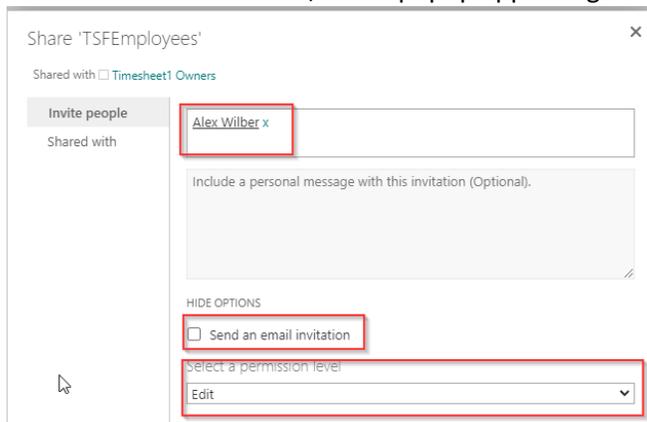
#	List	Normal user	Manager	Human Resource	Administrator	System Admin
1	The Employee List	Read	Read	Read	Contribute	Full Control
2	The department list	Read	Read	Read	Contribute	Full Control
3	The location list	Read	Read	Read	Contribute	Full Control
4	The types list	Read	Read	Read	Contribute	Full Control
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

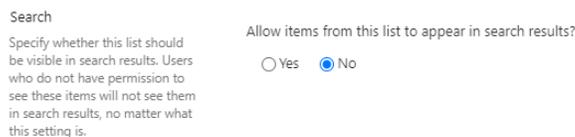


- Add permissions as in the table above. Then click on the Share button

### 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