



# LTAPPS Time Off

## Configuration Guide

Version 1.0

## Table of Contents

Overview .....	4
Form Settings .....	5
Workflows .....	5
Notification Email Templates .....	9
Fields Setting .....	10
Views Settings .....	13
Home page: Calendar filter .....	14
Categories (Master Lists) .....	14
Types (Reason of Leave) .....	14
Employees .....	15
Departments .....	16
Locations .....	17
Working Times .....	17
Public holidays .....	18
Balance Management .....	19
Update the balance by manual .....	19
Update the balance by Excel file .....	19
Default the balance .....	20
Carry forward leave days/hours into the next year .....	21
Enable .....	21
Update days/hours remaining by manual .....	21
Update days/hours remaining by the tool .....	22
Increase the number of hours/days allocated by Month .....	22
Other features .....	24
Automatic Calculate the number of days/hours .....	24
Delegate feature .....	24
Fiscal Year .....	24
Auto Fill the Department Field .....	25
Prevent the Overlapping .....	25



Date Time format.....	26
Submit on behalf.....	26
Restrict the users displays of the employees field in the search, report page .....	26
The Home page of the app .....	27
SharePoint site URL.....	27
Admin & Administrator roles .....	27
Sync the request to Outlook .....	27
Introduce Field .....	28
Discuss Feature .....	29
Multi Locations .....	30
General Configurations .....	31
Translations .....	32
Retroactive.....	33
Advance Permissions .....	34
Turn off the recent activity .....	35

# LTAPPS Time Off

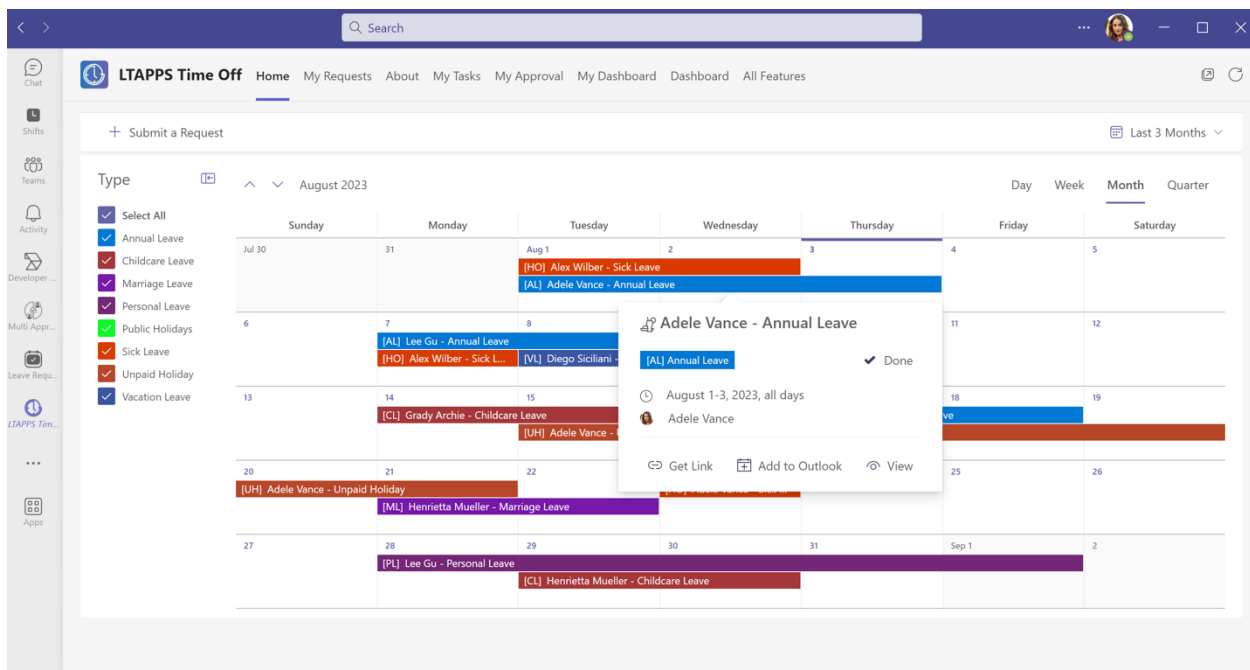
LTAPPS Time Off is a software application that allows employees to create and submit requests for time off

## Overview

LTAPPS Time Off is a software application that allows employees to create and submit requests for time off from work, and managers to approve or reject them. A leave request app can also track the leave balances, status, and history of each employee, as well as the company holidays and policies.

LTAPPS Time Off app can benefit both employees and managers by simplifying the process of requesting and approving time off, reducing errors and delays, increasing transparency and accountability, and improving employee satisfaction and productivity.

Users can submit the request via desktop, mobile, web app, or platforms such as O365 apps, SharePoint or Microsoft Teams.



The screenshot displays the LTAPPS Time Off web application interface. The top navigation bar includes a search bar and menu items: Home, My Requests, About, My Tasks, My Approval, My Dashboard, Dashboard, and All Features. The main content area is titled "Submit a Request" and shows a calendar for August 2023. A sidebar on the left lists various leave types with checkboxes: Select All, Annual Leave, Childcare Leave, Marriage Leave, Personal Leave, Public Holidays, Sick Leave, Unpaid Holiday, and Vacation Leave. The calendar grid shows leave requests for various employees, such as Alex Wilber (Sick Leave), Adele Vance (Annual Leave), Lee Gu (Annual Leave), Diego Siciliani (Annual Leave), Grady Archie (Childcare Leave), Adele Vance (Unpaid Holiday), Henrietta Mueller (Marriage Leave), and Lee Gu (Personal Leave). A modal window is open over the calendar, displaying details for "Adele Vance - Annual Leave" with a "Done" button and options to "Get Link", "Add to Outlook", and "View".

## Form Settings

[General Info](#)
[Workflows](#)
[Event Template](#)
[Introduce Field](#)
[Discussion Feature](#)

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

[+ Add Field](#)

Display Name	Static Name	Type	Order	Remove
Sys Start and End Dates	BOF_StartEndDate	DateTime	1	
Details	TOF_Details	Note	2	
Attachments	Attachments	Attachments	3	

[Close](#)
[Save](#)

The feature support to define the input form for the Leave Request. With this feature, you can define which/where fields display.

Follows the steps below:

- On the Home page of the app, click on the All Features button.
- On the All Features page, click on the Settings > Time Off Form Settings
- Click on the Add Field button, then select the field you want. The fields list defines in the Fields Settings section below.

Add Fields ×

Select

[Close](#)

- Use the dropdown in the Order column to set the position where the field shows.
- Click on the Delete icon in the Remove column to remove the field in the form.

## Workflows

Settings > **Time Off Form Settings**

[General Info](#)
[Workflows](#)
[Event Template](#)
[Introduce Field](#)
[Discussion Feature](#)

[+ New](#) ✓ Active  Inactive

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

The feature support to 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 Time Off Form Settings 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

---

Custom Status Text

Is Enable  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 are setup in the Field tab.
- In the Buttons Configuration section: If enabled, you can change the title of the Action buttons in the approval form such as Approve, Reject, Delegate, or Close buttons. You also can set the button to show/hide.
- In the Custom Status Text: If enabled, you can change the title of the status. E.g., the Step is Line Manager & Status is pending, you can change the status to "Pending Line Manager Approval"
- Active section: Don't use the step.
- Click on the Save button for any changes.



## Notification Email Templates

**Email Template** ×

---

**CC Steps**

CC Steps

---

**CC Users**

CC Users

---

**CC Users in the field**

Fields

---

**CC Current User**

CC Current User  Yes

---

**Subject**

Leave request for [%TSF\_Employee%] at [%BOF\_StartEndDate%]

---

**Body**

Hi there,

The leave request for [%TSF\_LeaveType%]. The reason for the request is that: [%TSF\_LeaveType%]

Here are some details about the leave request:

- Employee: [%TSF\_Employee%]
- Time: [%BOF\_StartEndDate%]
- Reason: [%TSF\_LeaveType%] - [%TOF\_NumberHoursOff%]
- Details: [%TOF\_Details%]

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

Thank you for your time and attention.

Sincerely,

× Close Save

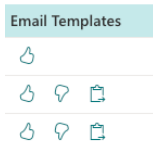
The feature support editing the notification email template when submitting/approving/delegating the request.

There are 3 types:

- Submit/Approve:
- Reject
- Delegate

Follow the steps below:

- On the Time Off Form Settings, switch to 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	[%TSF_LeaveType%]	Type
6	[%TOF_NumberHoursOff%]	Number of days/hours off
7	[%BOF_StartEndDate%]	From To Date
8	[%TSF_Comment%]	Comment when approving the request
9	[%TSF_CommentOwner%]	The user who sent the message
10	[%TSF_CommentTime%]	The time when the message sent
11	[%TOF_Details%]	Details

- **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.**

## Fields Setting

The feature supports customizing the Time Off 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
	Details	TOF_Details	Note

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,

## 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

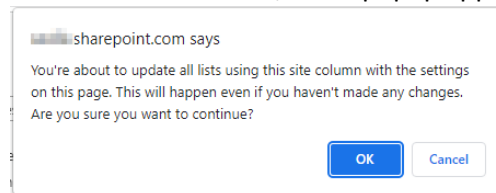
### Column Validation

- **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  
  Employee Report - Detail  
  Manager Report - Detail

Event Title: [%TSF\_Employee%] - [%TSF\_LeaveType%]  
 Default View: Calendar  
 Calendar Mode: Monthly  
 Is Refiner Expand:  Expand

#	Display Name	Static Name	Type	Order	Show/Hide
1	ID	BOF_ID	SysField	1	<input checked="" type="checkbox"/>
2	Start Time	EventDate	DateTime	2	<input checked="" type="checkbox"/>
3	End Time	EndDate	DateTime	3	<input checked="" type="checkbox"/>
4	NumberHoursOff	TOF_NumberHoursOff	Number	4	<input checked="" type="checkbox"/>
5	sysLeaveType	TSF_LeaveType	Lookup	5	<input checked="" type="checkbox"/>
6	TOFStageLookup	TOF_StageLookup	Lookup	6	<input checked="" type="checkbox"/>
7	sysStatus	TSF_Status	Number	7	<input checked="" type="checkbox"/>
8	sysEmployee	TSF_Employee	User		<input type="checkbox"/>
9	sys Department	TSF_Department	Lookup		<input type="checkbox"/>

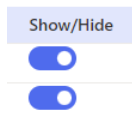
The feature support customizing the view or report. With this feature, you can show/hide or order the field in the view,

There are 6 views or reports you can custom:

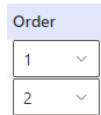
- Calendar
- My Requests
- My Tasks
- My approvals
- Searching
- Employee Report - Details
- Manager Report - Details

Follow the steps below:

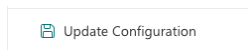
- Open the app, and click on the All Features button. Then click on the Settings section > Views Setting
- If the page has the calendar
  - Default View: The view loads first when open the page: Calendar view or List view
  - Calendar Mode: Quater/Monthly/Weekly/Daily
  - Is Refiner Expand: Expand/Collapse the Type 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 4 options:

- **All Time Off 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 Time Off of the Location (Induce the pending request of the current user):** It means the home page displays all requests of the location of the current user and the pending request of the current user.
- **All Time Off 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 Time Off of the Current User:** It means the home page displays the requests of the current user.

## Categories (Master Lists)

### Types (Reason of Leave)

Categories > Leave Types

+ New ✓ Active   ○ Inactive

Prefix	Title	Icon	Color	Order
AL	Annual Leave		<span style="color: blue;">●</span>	1
CL	Childcare Leave		<span style="color: red;">●</span>	2
HO	Sick Leave		<span style="color: orange;">●</span>	3
VL	Vacation Leave		<span style="color: blue;">●</span>	4
ML	Marriage Leave		<span style="color: purple;">●</span>	5
PL	Personal Leave		<span style="color: purple;">●</span>	6
UH	Unpaid Holiday		<span style="color: orange;">●</span>	7

This feature allows you to manage the leave types.

Follow the steps below:

- On the All Features page, click on Categories > Leave Types

- 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
  - Text Color: The text color of the type (Black or White)
  - Description:
  - Active:
  - Order: The position of the type
- Others
  - Allow Carry Forward: Support the Carry Forward leaves into the Next Year feature.
  - Allow Increase Allocated Days By Month: Enable the “Allow Increase Allocated Days By Month” feature.
  - Allow Submit the Negative Balance,
- Click on the Save button for any changes.

## Employees

Categories > Employees List

+ New Manage Employees ✔ Active  Inactive

	Title	Department	Managers	Human Resources	Working Time	Location	Active
	Adele Vance	IT	Diego Siciliani,		Default		Yes
	Alex Wilber	IT	Diego Siciliani,		Default		Yes
	Diego Siciliani	IT	Diego Siciliani,		Default		Yes
	Grady Archie	IT	Diego Siciliani,		Default		Yes
	Henrietta Mueller	IT	Diego Siciliani,		Default		Yes
	Lee Gu	IT	Diego Siciliani,		Default		Yes

This feature allows to set up the employees list

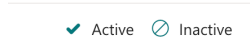
Follow the steps below

- Open the app, and click on the All Features button.
- In All Features, click on Categories (Master List)> Employees List
- Click on the New or Edit icon to add/edit the employee
  - Employee (Mandatory): The employee’s name
  - Department (Mandatory): The employee’s department
  - Manager (Mandatory): The line manager of the employee
  - Human Resource (Optional): The human resource of the employee. This config supports some features of the process workflow & views.
  - Working Time (Optional): The working time of the employee. This config supports the working types such as full-time, and haft-time,... if it is blank, the app autos get the default working time for the employee

- Location (Optional): The location (Country) where the employee is working. This config supports Multi-Locations feature.
- Date Joining (Optional): The date when the employee joins the company. This config supports “Increase Allocated Days By Month” feature
- Active
- Click on the Save button to save any changes.
- Click on the Manage Employee button to open the SharePoint view.







- Click on the Active/Inactive buttons to switch the view.



## Departments

Categories > Departments List

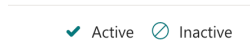
+ New  Manage Departments ✔ Active  Inactive

Title	Managers	Human Resources	Active
 IT	Diego Siciliani,		Yes
 Accounting	Alex Wilber,		Yes
 Human Resource	Grady Archie,		Yes

This feature supports managing the department.

Follow the steps below:

- Open the app, click on the All Features button
- In All Features, click on Categories > Departments List
- Click on the New or Edit icon to add/edit the department
  - Title (Mandatory): The department’s name.
  - Manager (Mandatory): The manager of the department.
  - Human Resource (Optional): The human resource of the department. This config supports some features of the process workflow & views.
  - Active
- Click on the Save button to save any changes.
- Click on the Active/Inactive buttons to switch the view.









## Locations

Categories > Locations List

+ New ✔ Active ⓧ Inactive

Title	Active
 Vietnam	Yes
 United Kingdom	Yes
 United States of America	Yes
 Germany	Yes

This feature supports managing the location.

Follow the steps below:

- Open the app, click on the All Features button
- In All Features, click on Categories > Locations List
- Click on the New button
  - Title (Mandatory): The location's name
  - Active
- Click on the Save button to save any changes.
- Click on the Active/Inactive buttons to switch the view.

✔ Active ⓧ Inactive

## Working Times

Categories > Working Times

+ New ✔ Active ⓧ Inactive

Title	Working Time	Break Time	Hours	Weekend	Default	Active
 Default	08:00 - 17:00	12:00 - 13:00	8	SaturdaySunday	Yes	Yes
 Full Time	08:00 - 17:00	12:00 - 13:00	8	SaturdaySunday	No	Yes
 Part Time	08:00 - 12:00	12:00 - 12:00	4	SaturdaySunday	No	Yes

This feature supports managing the working time.

Follow the steps below:



- Open the app, click on All Features button.
- In All Features, click on Categories > Working Times List.
- Click on the New button
  - Title (Mandatory): The working time's name.
  - Working Time: Select the start & end times.
  - Break Time: Select the start & end times.
  - Weekend: Select the weekend
  - Active

- Click on the Save button to save any changes.
- Click on the Active/Inactive buttons to switch the view.





Active  Inactive

## Public holidays

Categories > Public Holidays List

+ New  Update Configuration  Active  Inactive  Year: 2023  Location: All


Color   Text Color  Black

Title	From	To	Location	Active
 New Year's Day	Sunday, January 1 2023	Sunday, January 1 2023	United States of America	Yes
 Martin Luther King Jr. Day	Monday, January 16 2023	Monday, January 16 2023	United States of America	Yes
 Presidents' Day	Monday, February 20 2023	Monday, February 20 2023	United States of America	Yes
 Memorial Day	Monday, May 29 2023	Monday, May 29 2023	United States of America	Yes

This feature supports managing the public holiday.

Follow the steps below:

- Open the app, click on All Features button.
- In All Features, click on Categories > Public Holidays List.
- To set up the color of the public holiday
  - Color: The background color
  - Text Color: The text color
- Click on the Update Configuration button to save any changes.
- Click on the New button
  - Title (Mandatory): The public holiday's name.
  - From (Mandatory): The from date
  - To (Mandatory): The to date
  - Location (Optional): The location (Country) of the public holidays. This config supports Multi-Location feature
  - Year
  - Active
- Click on the Save button to save any changes.
- Click on the Active/Inactive buttons to switch/change the filter of the view.

Active  Inactive  Year: 2023  Location: All

# Balance Management

## Update the balance by manual

Categories > Balance Mgt > Leave Balance Management

+ New Employee    Update Configuration    Year 2023

#	Employee	Annual Leave	Sick Leave	Vacation Leave	Childcare Leave	Marriage Leave	Personal Leave	Unpaid Holiday
1	Adele Vance	144	240	240	240	240	240	240
2	Alex Wilber	144	240	240	240	240	240	240
3	Diego Siciliani	144	240	240	240	240	240	240
4	Grady Archie	144	240	240	240	240	240	240
5	Henrietta Mueller	144	240	240	240	240	240	240
6	Lee Gu	144	240	240	240	240	240	240

This feature support updating the days allocated for the employee & type.

Follow the steps below:

- On All Feature page > click on Categories > Balance Management > Balance Management
- Click on the New Employee to add the employee.
- Input the number of days allocated for the employee & type.
- Click on the Update Configuration to save any changes.
- Use the Year dropdown to switch the year

Year 2023

## Update the balance by Excel file

Categories > Balance Mgt > Upload Balance

**1** Follow the steps below to update the balances for the employees

- Click the **Download The Excel Template** button to download the template
- Input values to the Excel file.
- Select the Excel file above. Review the data in the table
- Click on **Update The Balance** button. Wait some minutes to complete the process & check the result in the table

Please make sure input the valid value in the excel file

- No(Optional): Input the number
- Email(Required): Email of the user. e.g., **user.1@abc.com**
- Year(Required): Input the number. e.g., **2023** or **2024**,...
- Others(Required): Input the number of the days/hours for each types

↑ Update the balance
↓ Download The Excel Template

Choose File | No file chosen

No	Email	Year	Annual	Sick	Vacation	Childcare	Marriage	Personal	Unpaid	Note
	*	*	Leave*	Leave*	Leave*	Leave*	Leave*	Leave*	Holiday*	

This feature support updating the days allocated for the employee & type by Excel file

Follow the steps below:

- On All Feature page > click on Categories > Balance Management > Upload the
- On All Feature page > click on Categories > Balance Management > Balance Management
- Click the Download The Excel Template button to download the template

- Input values to the Excel file.
  - No(Optional): Input the number
  - Email(Required): Email of the user. e.g., user\_1@abc.com
  - Year(Required): Input the number. e.g., 2023 or 2024,...
  - Others(Required): Input the number of days/hours for each type
- Select the Excel file above. Review the data in the table
- Click on Update The Balance button. Wait some minutes to complete the process & check the result in the table

## Default the balance

Categories > Balance Mgt > Leave Balance Management

Update Configuration Year 2023 ▾

#	Type	Default
1	Annual Leave	144 <input type="text"/>
2	Sick Leave	240 <input type="text"/>
3	Vacation Leave	240 <input type="text"/>
4	Childcare Leave	240 <input type="text"/>
5	Marriage Leave	240 <input type="text"/>
6	Personal Leave	240 <input type="text"/>
7	Unpaid Holiday	240 <input type="text"/>

This feature support updating the default days allocated for the employee & type. If the balance doesn't set direct to the employee. The app will get the number of days/hours allocated from here.

Follow the steps below:

- On All Feature page > click on Categories > Balance Management > Default Balance
- Click on the New Employee to add the employee.
- Input the number of days allocated for the type.
- Click on the Update Configuration to save any changes.
- Use the Year dropdown to switch the year

▾

## Carry forward leave days/hours into the next year

Categories > Balance Mgt > Leave Balance Management

+ New Employee    Update Configuration    Year 2023

#	Employee	Annual Leave		Sick Leave		Vacation Leave	Childcare Leave	Marriage Leave	Personal Leave		Unpaid Holiday
		Remain 2022	2023						Remain 2022	2023	
1	Adele Vance	32	144	240	240	240	240	240	40	240	240
2	Alex Wilber	8	144	240	240	240	240	240	16	240	240
3	Diego Siciliani	8	144	240	240	240	240	240	16	240	240
4	Grady Archie	8	144	240	240	240	240	240	16	240	240
5	Henrietta Mueller	0	144	240	240	240	240	240	0	240	240
6	Lee Gu	0	144	240	240	240	240	240	0	240	240

This feature supports bringing the remaining days to the next year.

### Enable

Follow the steps below:

- On All Features, click on Categories > Leave Types.
- Click on the edit icon of the leave type you want to enable.
- On the Type form

Allow Carry Forward  Yes      Expires in months:

Allow Increase Allocated Days By Months  No

Allow Submit the Negative Balance  Yes

- Allow Carry Forward: Yes
- Expires in Months: Number of months after the fiscal end date the employee can use the remaining days/hours

### Update days/hours remaining by manual

Follow the steps below:

- On All Features, click on Categories > Balance Management > Balance Management.
- In the column of the type, there are 2 sub-columns. If the current year is 2023.
  - Remaining 2022: It is the number of the remaining days/hours of the previous year.
  - 2023: It is the number of days/hours allocated for 2023.
- Input the number to the Remaining 2022 column.
- Click on the Update Configuration to save any changes.

## Update days/hours remaining by the tool

Categories > Balance Mgt > Upload the remaining hours/days in the year

① Follow the steps below to carry forward leaves to the next year

- Select the type you want to update
- Select the year. E.g. if you want to bring forward leaves to **2024**, you need to select the year is **2023**
- Review the data in the table
- Click on the **Update the Remaining** button. Wait some minutes to complete the process

Columns meaning

- **RP** Remaining - Previous Year: The remaining hours/days bring from the previous year
- **TP** Taken for PY: The taken the remaining days of the previous year before the expired
- **BL** Allowed: The allowcated days of the year
- **TK** Taken: The taken days of the year
- **RN** Remaining - for the Next Year:
  - if  $(TP \geq RP)$ :  $RN = (BL + RP) - TK$
  - else  $RN = BL - (TK - TP)$

↑ Update the Remaining

Annual Leave ▾ Year 2023 ▾

#	Employee	Remaining - Previous Year (RP)	Taken - Before Expired(TP)	Balance (BL)	Taken (TK)	Remaining - for Next Year(RN)
1	Adele Vance	32	88	144	88	88
2	Alex Wilber	8	16	144	16	136
3	Diego Siciliani	8	40	144	40	112
4	Grady Archie	8	32	144	32	120
5	Henrietta Mueller	0	24	144	24	120
6	Lee Gu	0	16	144	16	128

Follow the steps below:

- On All Features, click on Categories > Balance Management > Update the Remaining Days/Hours into the Next Year.
- Select the type you want to update
- Select the year. E.g. if you want to bring forward leaves to 2024, you need to select the year is 2023
- Review the data in the table
  - RP Remaining - Previous Year: The remaining hours/days bring from the previous year
  - TP Taken for PY: The taken the remaining days of the previous year before the expired
  - BL Allowed: The allowcated days of the year
  - TK Taken: The taken days of the year
  - RN Remaining - for the Next Year:
    - if  $(TP \geq RP)$ :  $RN = (BL + RP) - TK$
    - else  $RN = BL - (TK - TP)$
- Click on the Update the Remaining button. Wait some minutes to complete the process.

### Increase the number of hours/days allocated by Month

This feature supports increasing the number of hours/days allocated by Month

To enable this feature, make sure 3 points:

1. On the leave type, you want to enable. The config "Allow increase Allocated Days by Month" is Yes

Allow Carry Forward  
 Expires in months:

Allow Increase Allowcated Days By Months

Allow Submit the Negative Balance

2. Set the Date Joining for the employee.

**Employee** ×

Name: Adele Vance

Department: IT

Managers: Diego Siciliani ×

Human Resources:

Working Time: Default

Location:

**Date Joining** 📅

Thursday, August 3 2023

Active:  Yes

× Close 💾 Save

3. Balance management

- Set the number of days/hours allocated for the employee & type

Categories > Balance Mgt > Leave Balance Management

+ New Employee 📄 Update Configuration 📅 Year 2023

#	Employee	Annual Leave		Sick Leave	Vacation Leave	Childcare Leave	Marriage Leave	Personal Leave		Unpaid Holiday
		Remain 2022	2023					Remain 2022	2023	
1	Adele Vance	32	144	240	240	240	240	40	240	240
2	Alex Wilber	8	144	240	240	240	240	16	240	240

- Set the default of number of days/hours allocated for the type

📄 Update Configuration 📅 Year 2023

#	Type	Default
1	Annual Leave	144
2	Sick Leave	240
3	Vacation Leave	240
4	Childcare Leave	240
5	Marriage Leave	240
6	Personal Leave	240
7	Unpaid Holiday	240

## Other features

### Automatic Calculate the number of days/hours

Enable the automatic calculation on the number of days/hours

Yes

Type

Automatic set the End Date by select the Start Date & Hours

Number of

Hours

The feature supports:

- Calculate the number of days/hours between start & end dates.
- Set the end date by start & number of days/hours.

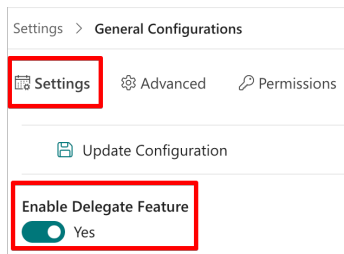
Follow the steps below:

- On All Features page, click on Settings > General configuration
- Enable the automatic calculation on the number of days/hours

### Delegate feature

The feature support re-assigning the task to another.

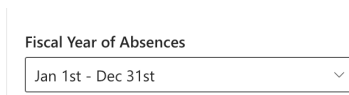
Open the general configuration page > Settings tab. Enable the feature.



### Fiscal Year

The feature support defining the fiscal year.

Open the general configuration page > Advanced tab. Select the fiscal year option





## Auto Fill the Department Field

Settings Advanced Permissions

Update Configuration

Enable Delegate Feature

Yes

Auto Fill the Department Field

Yes

Is Check Overlapping

Yes

The feature supports automatic set the department when submitting the request.

If the feature is enabled, the app will automatically set the department to the Department field & the end-user cannot edit it.

There are 3 cases:

- If the employee is added to the employee's list > The app will get the department from this employee's info.
- If the employee is not added to the employee's list> The app will get the employee's department from the Active Directory.
  - o To support this, the department's name in the Active Directory needs to be the same as the department's name in the department's list.
  - o If not the same, this option will not work.
- If the app cannot get the employee's department, the employee can select the department when submitting the request.

## Prevent the Overlapping

Settings > General Configurations

Settings Advanced Permissions

Update Configuration

Enable Delegate Feature

Yes

Auto Fill the Department Field

Yes

Is Check Overlapping

Yes

The feature supports preventing overlapping dates when the employee submits the request.

Open the general configuration page & enable it.

## Date Time format

Start & End Date Fields Format

DateTime

Date Format

MMMM D YYYY

The feature supports the date field displays.

There are 2 configurations:

- Start & End Date fields format: The start & end date fields display when submitting/approving the request. 2 options:
  - Date Only
  - Date Time
- Date Format: the date's format in the app

## Submit on behalf

Who can submit on behalf the timesheet for the employee

Administrator, Manager of the employee...

Manager of the employee

Human Resource of the employee

Administrator

The feature supports the manager, human resource or administrator can submit on behalf of the employee.

There are 3 options or you can select all of them:

- Manager of the employee: The line manager is configured in the employee's list.
- Human resource of the employee: The human resource is configured in the employee's list.
- Administrator

## Restrict the users displays of the employees field in the search, report page

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

Employees in the Employees List

The feature support restricting the users shown in the employee dropdown field. It prevents the system shows in the employee field.

Open the general configuration page > Advanced tab.

You can select the option:

- All users in the SharePoint site
- Employees in the employees list
- Form a SharePoint group

## The Home page of the app

The home page URL of the app

https://[redacted]/sites/TimeoffAug03/SitePages/Time-Off.aspx

The feature supports the link in the notification email.

Because the app can work in Microsoft Teams, and Microsoft Apps but the app cannot support opening the app on Microsoft Teams, Microsoft Apps via the link in the notification email.

To support the link in the email notification when using the app on MS Teams & MS Apps. Adding the URL of the SharePoint page where the web part is added to this configuration.

## SharePoint site URL

This setting only displays on MS Teams/O365 Apps, it allows to change the SharePoint site where the app on MS Teams/O365 app is linked.

## Admin & Administrator roles

System Admins

Adele Vance

Administrators

Adele Vance

The feature set up the roles:

- Admin: Full permission in the app
- Administrator: who has some permission such as add the categories, remove the pending request,...

Open the general configuration page > Advanced tab. Then select the user who are the admin or administrator.

## Sync the request to Outlook

Settings > Time Off Form Settings

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

Title  
[%TSF\_Employee%] - [%TSF\_LeaveType%]

Required Attendees  
[Dropdown]

Optional Attendees  
[Dropdown]

Location  
sysLeaveType

Details  
Details

Online Meeting  
None

Is Meeting Online (Default?)  
 No

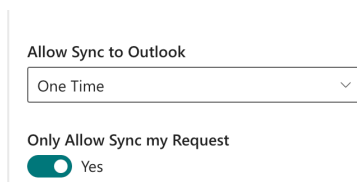
Close Save

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

Follows the steps below:

- On All Feature page, click on Settings > Time Off Form Settings
- Switch to the Event Template tab
  - 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
- Click on the Save button to save any changes.

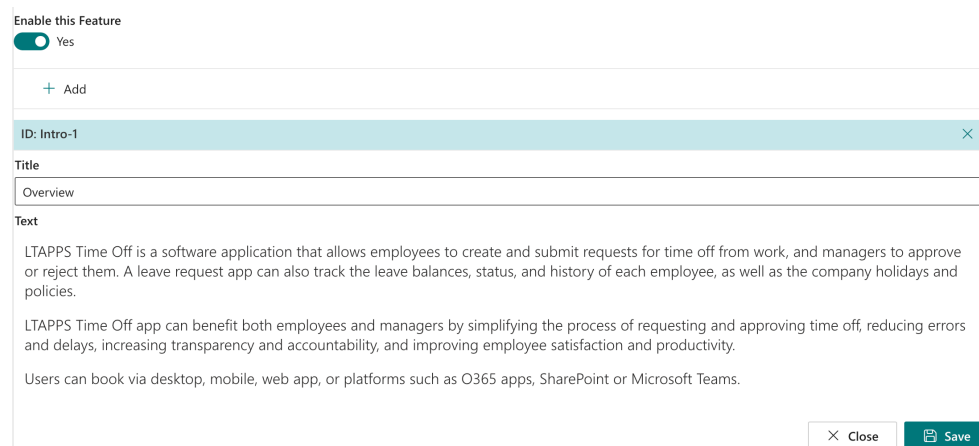
You can set up the number of times to allow sync in the general configuration.



Allow Sync to Outlook  
One Time

Only Allow Sync my Request  
 Yes

## Introduce Field



Enable this Feature  
 Yes

+ Add

ID: Intro-1

Title  
Overview

Text  
LTAPPS Time Off is a software application that allows employees to create and submit requests for time off from work, and managers to approve or reject them. A leave request app can also track the leave balances, status, and history of each employee, as well as the company holidays and policies.  
LTAPPS Time Off app can benefit both employees and managers by simplifying the process of requesting and approving time off, reducing errors and delays, increasing transparency and accountability, and improving employee satisfaction and productivity.  
Users can book via desktop, mobile, web app, or platforms such as O365 apps, SharePoint or Microsoft Teams.

Close Save

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

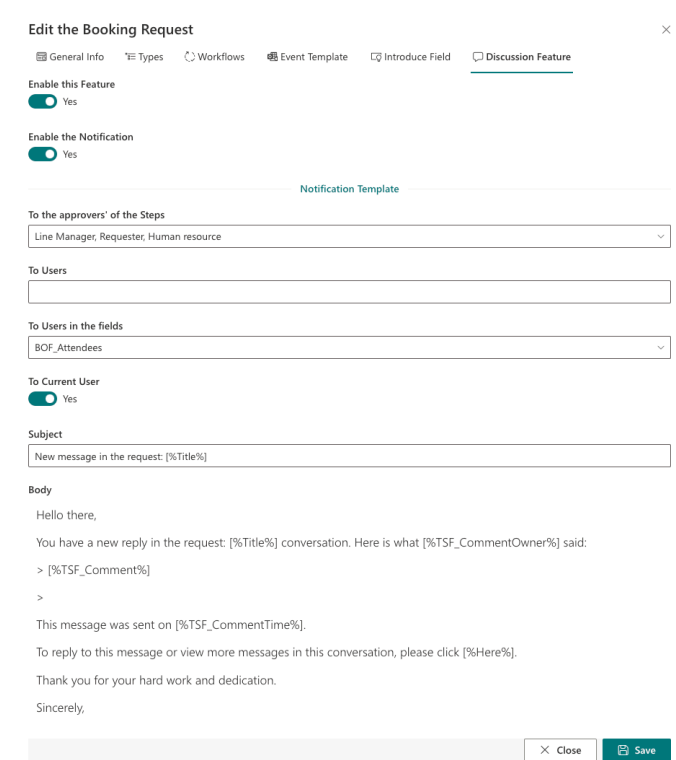
- Input
  - ID: The ID of the field

- 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.



- 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.

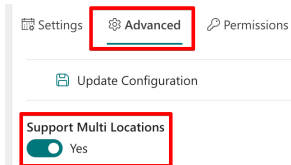
- Notification Template. Please refer to the Notification Email Template above

## Multi Locations

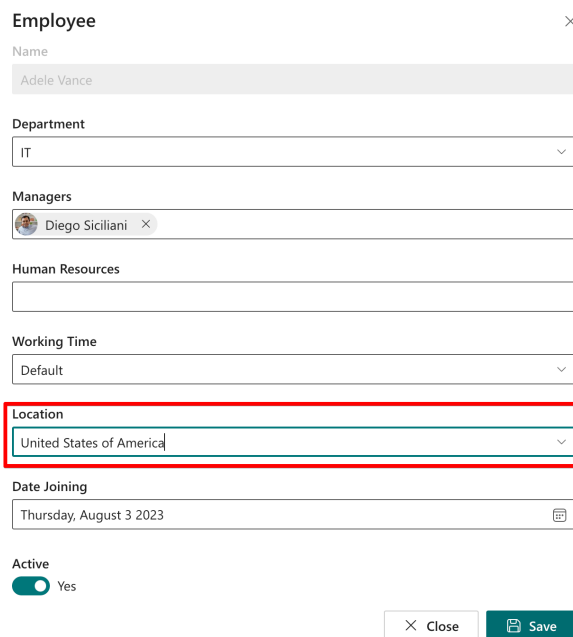
The feature supports different countries & different time zones.

To enable this feature, make sure 3 points:

1. Open the general configuration page > Advanced tab. Enable the multi-locations configuration.



2. Set the location for the employee.



**Employee** ×

Name  
Adele Vance

Department  
IT

Managers  
Diego Siciliani ×

Human Resources

Working Time  
Default

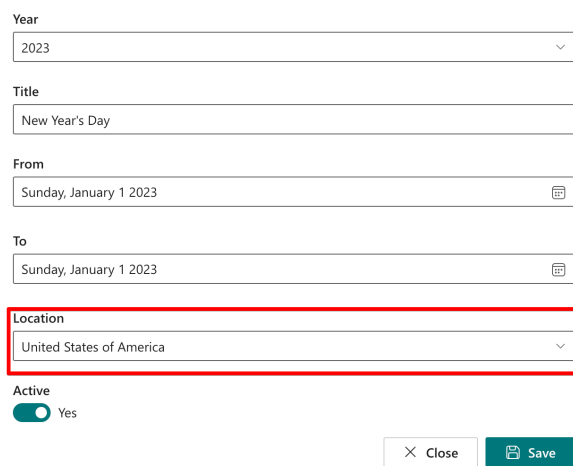
**Location**  
United States of America

Date Joining  
Thursday, August 3 2023

Active  
 Yes

× Close Save

3. Set the location for the public holiday.



Year  
2023

Title  
New Year's Day

From  
Sunday, January 1 2023

To  
Sunday, January 1 2023

**Location**  
United States of America

Active  
 Yes

× Close Save

## General Configurations

Settings > General Configurations

Settings Advanced Permissions Retroactive

Update Configuration

**Enable Delegate Feature**  
 Yes

**Auto Fill the Department Field**  
 Yes

**Is Check Overlapping**  
 Yes

**Allow Sync to Outlook**  
One Time

**Only Allow Sync my Request**  
 Yes

**Enable the automatic calculation on the number of days/hours**  
 Yes

**Type**  
Automatic set the End Date by select the Start Date & Hours

**Number of**  
 Hours

**Fiscal Year of Absences**  
Jan 1st - Dec 31st

**Start & End Date Fields Format**  
 DateTime

**Date Format**  
MMMM D YYYY

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 enabled, 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.
  - Is Check Overlapping: Prevent the overlapping date when submitting the request.

- 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.
- Enable the automatic calculation on number of days/hours
- Fiscal year
- Start & end date fields format
- Date Format
- Support Multi Locations
- 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

## Retroactive

Settings > General Configurations

Settings Advanced Permissions **Retroactive**

Follow the steps below to update the old data

- Click the **Download The Excel Template** button to download the template
- Input values to the Excel file.
- Select the Excel file above. Review the data in the table
- Click on the **Upload The Data** button. Wait some minutes to complete the process & check the result in the table

Please make sure input the valid value in the excel file

- No: Input the number
- Employee or User: Email of the user. e.g., **user\_1@abc.com**
- Date Time: In the excel file, format to the Date Time field. After select the excel file, the app automatics format to **MM/DD/YYYY**
- Multi Choices, Multi Users or Multi Lookup: The syntax is **Value 1;Value2**
- Yes/No: Input the value is **Yes/No**

No file chosen

No	Employee *	Department *	Location	Type *	Working Time	Start Date *	End Date *	# of Hours Off *	Is All Day *	Details	Note
----	------------	--------------	----------	--------	--------------	--------------	------------	------------------	--------------	---------	------

The feature allows updating the old data.

Open the general configuration page > Retroactive tab.































Follow the steps below:

- Click the Download The Excel Template button to download the template
- Input values to the Excel file.
  - No: Input the number
  - Employee or User: Email of the user. e.g., user\_1@abc.com
  - Date Time: In the excel file, format to the Date Time field. After select the excel file, the app automatics format to MM/DD/YYYY
  - Multi Choices, Multi Users or Multi Lookup: The syntax is Value 1;Value2
  - Yes/No: Input the value is Yes/No
- Select the Excel file above. Review the data in the table.
- Click on the Upload The Data button. Wait some minutes to complete the process & check the result in the table

# Advance Permissions

 Settings
  Advanced
  **Permissions**
 Retroactive

① 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		
1	The employees list	 Permissions	 Advanced Settings
2	The departments list	 Permissions	 Advanced Settings
3	The leave types list	 Permissions	 Advanced Settings
4	The balance for employees list	 Permissions	 Advanced Settings
5	The default number of hours/days allowcated for types	 Permissions	 Advanced Settings
6	The public holidays list	 Permissions	 Advanced Settings
7	The working times list	 Permissions	 Advanced Settings
8	The workflows list	 Permissions	 Advanced Settings
9	The email templates for the workflow	 Permissions	 Advanced Settings
10	The Types list	 Permissions	 Advanced Settings
11	The locations list	 Permissions	 Advanced Settings
12	The discussion list	 Permissions	 Advanced Settings
13	The leave request list	 Permissions	 Advanced Settings
14	The tasks list for the process workflow	 Permissions	 Advanced Settings
15	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

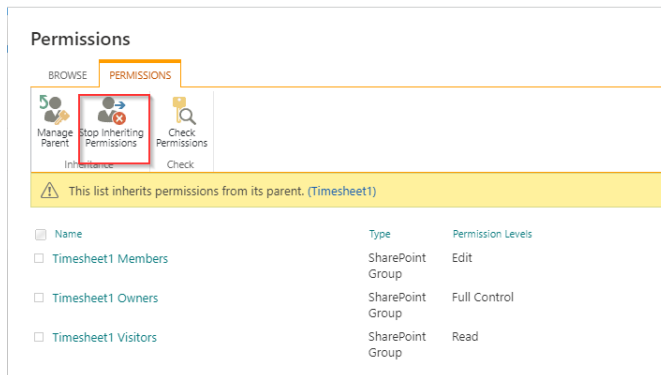
If you want to the app be more secure, you can reset the permission for each SharePoint list where the app stores the data. You should set

#	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 leave types list	Read	Read	Read	Contribute	Full Control
4	The balance for employees list	Read	Read	Read	Contribute	Full Control
5	The default number of hours/days allocated for types	Read	Read	Read	Contribute	Full Control
6	The public holidays list	Read	Read	Read	Contribute	Full Control
7	The working times list	Read	Read	Read	Contribute	Full Control
8	The location list	Read	Read	Read	Contribute	Full Control
9	The discussion	Contribute	Contribute	Contribute	Contribute	Full Control
10	The workflows list	Read	Read	Read	Contribute	Full Control
11	The Request Form Type	Read	Read	Read	Contribute	Full Control

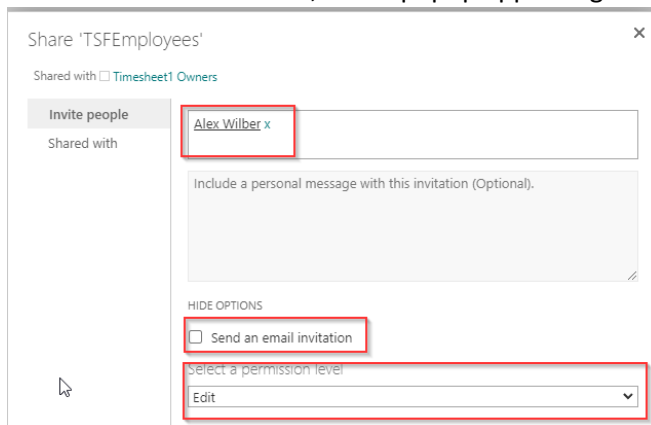
12	The email templates	Read	Read	Read	Contribute	Full Control
13	The leave request list for the process	Contribute	Contribute	Contribute	Contribute	Full Control
14	The tasks list for the process workflow	Contribute	Contribute	Contribute	Contribute	Full Control
15	The configurations list	Read	Read	Read	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



#### Search

Specify whether this list should be visible in search results. Users who do not have permission to see these items will not see them in search results, no matter what this setting is.

Allow items from this list to appear in search results?

Yes  No

- Click on the Ok button