



Manual For Administrator

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Getting Started with Workflows

For using Jobcan Workflow, it is necessary to configure basic data beforehand.

Basic Information Setting List

 User [30items] ③ Register users who can use the service. Users can be associated with groups or titles.	 Route [34items] ④ Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	 Form [34items] ⑤ Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	 Form categories [10items] ⑥ Registering a form type allows you to manage your forms by classifying them
 Group [20items] ① Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	 Post rank [13items] ② Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	 Project [4items] ⑦ You can register a project. Registering will allow you to link your project to your application information	 Generic master settings [6items] ⑧ You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

The configuration steps for getting started are as follows:

1. Group Registration ***Required**
2. Post Rank Registration ***Required**
3. User Registration ***Required**
4. Route (Workflow) Registration ***Required**
5. Form Registration ***Required**
6. Form Categories Registration
7. Project Registration
8. Generic Master Settings Registration

1. Group Registration (Group)

Groups in Jobcan Workflow represent the organizational structure within a company, such as departments or divisions. By registering groups, you can:

- Assign users to specific groups.
- Select group-specific approvers for users within each group. 「Group Approvers」

1.1 How to Register a Group

1. Select 「Basic Information Setting」 From the 「Administrator Function」 menu on the left side and select 「Group」

The screenshot shows the 'Basic Information Setting List' interface. On the left, there is a sidebar menu with 'Administrator function' expanded, and 'Group' is selected and highlighted with a red box. The main content area displays a grid of settings:

Basic Information Setting List			
User [30Items] Register users who can use the service. Users can be associated with groups or titles.	Route [34Items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [34Items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [10Items] Registering a form type allows you to manage your forms by classifying them
Group [20Items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13Items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4Items] You can register a project. Registering will allow you to link your project to your application information	Generic master settings [6Items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Select 「Register a new group」 at the top

⚠ In case you haven't registered any items yet, when you select 「Groups」 in Step 1, the 「Group Registration」 screen will appear in Step 3.

The screenshot shows the 'Group list' screen. It features a title 'Group list' and a subtitle 'List of registered groups'. Below the subtitle, it says 'You can register a new group using the button below'. At the bottom, there are four buttons: 'Register a new group', 'CSVUpload', 'CSV Sample', and 'Download CSV'.

3. Fill in group information

General Information

Group name
(Required)

group code
Enter a group code, such as a branch number or department code, to identify the group

Explanation

Main group 
If you manage groups in a hierarchical way, please set up a group that is the "parent (main group)" of this group

Group name	Required	Setting the name of the group, such as the department name (no more than 255 characters)
Group code	Not mandatory	You can fill in the appropriate code for the group (numbers must not exceed 255 characters, must be in English).
Explanation	Not mandatory	Fill in information if there is a description of the group.
Main group	Not mandatory	In the case where you want to assign a higher level to a group that has already been registered, you can register it with a higher level than other groups.

4. After fill in the necessary information in the required fields, click the "Save" button to complete the registration process.

General Information

Group name
(Required)

group code
Enter a group code, such as a branch number or department code, to identify the group

Explanation

Main group 
If you manage groups in a hierarchical way, please set up a group that is the "parent (main group)" of this group

1.2 Group Modification

How to change the information of a group that has been successfully registered is below. Even if the group information is edited, it does not affect completed requests or in-progress requests.

✘ For requests where the group is configured for the approver, if the group is deleted, the name of the deleted group will no longer appear in the "Approver" field of that request

1. Select 「Basic Information Setting」 under the " 「Manager Functions」 in the left menu, then choose 「Group」 from the list on the screen.

Basic Information Setting List

User [31Items] Register users who can use the service. Users can be associated with groups or titles.	Route [34Items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [35Items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [10Items] Registering a form type allows you to manage your forms by classifying them
Group [20Items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13Items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4Items] You can register a project. Registering will allow you to link your project to your application information	Generic master settings [6Items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on the 「group」 that you want to modify on the 「Group Name」 screen.

Group list

List of registered groups
You can register a new group using the button below

Register a new group CSVUpload CSV Sample Download CSV

Group name : JOBCAN TH Code : JCTH Explanation : JOBCAN TH TEST
Group name : Driver Code : DIBKK Explanation : คนขับรถในสาขากรุงเทพ
Group name : Office Code : -
Group name : Sales Code : -

3. If the information has been changed, click “Update”.

Group registration

Register groups such as a department or branch
Once groups are set up, you can link users to groups and specify groups in the approval route setting

Show group list

General Information

Group name
(Required)

JOBCAN TH

group code

JCTH

Enter a group code, such as a branch number or department code, to identify the group

Explanation

JOBCAN TH TEST

Main group

Select group x

If you manage groups in a hierarchical way, please set up a group that is the "parent (main group)" of this group

Update

1.3 Group Deletion

Groups created can be deleted. Deleted data cannot be restored. Even after deleting the group, the user associated with it is deleted. But it will not affect past requests.

1. Select 「Basic Information Setting」 under the 「Manager Functions」 in the left menu, then choose 「Group」 from the list on the screen.

Application function

Approval function

Approve 0

Sharing / View function

Applications you shared

Applications shared to you

View applications

Administrator function

All applications

All files

Basic information setting

Basic Information Setting List

<p>User [31Items]</p> <p>Register users who can use the service. Users can be associated with groups or titles.</p>	<p>Route [34Items]</p> <p>Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.</p>	<p>Form [35Items]</p> <p>Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.</p>	<p>Form categories [10Items]</p> <p>Registering a form type allows you to manage your forms by classifying them</p>
<p>Group [20Items]</p> <p>Register the group corresponding to the department of your company. You can set the group to which the user belongs, and link the group to the application.</p>	<p>Post rank [13Items]</p> <p>Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.</p>	<p>Project [4Items]</p> <p>You can register a project. Registering will allow you to link your project to your application information</p>	<p>Generic master settings [6Items]</p> <p>You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.</p>

2. Use your mouse to point to the group that you want to delete on the screen. 「Group List」
3. Click the icon  on the right side. ****Deleted data cannot be retrieved.**

Group list

List of registered groups
You can register a new group using the button below

[Register a new group](#)[CSVUpload](#)[CSV Sample](#)[Download CSV](#)

Group name : JOBCAN TH

Code : JCTH Explanation : JOBCAN TH TEST

Group name : Driver

Code : DiBKK Explanation : คนขับรถในสาขากรุงเทพ

Group name : Office

Code : -

Group name : Sales

Code : -

Group name : Engineer

Code : -



2. Registering Positions (Post rank)

The positions in jobcan workflow refer to the positions within the organizational structure of the company. By configuring positions, you can limit the forms that can be used based on those positions. Additionally, you can add specific positions to the approval flow.

2.1 Position Registration Methods

1. Select 「Basic Information Setting」 in 「Administration Function」 on the left side and select 「Post rank」 from the list on the screen.

The screenshot shows the 'Basic Information Setting List' interface. On the left is a navigation menu with categories: Application function, Approval function, Sharing / View function, and Administrator function. The 'Basic Information Setting List' contains several settings:

User [31items]	Route [34items]	Form [35items]	Form categories [10items]
Register users who can use the service. Users can be associated with groups or titles.	Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Registering a form type allows you to manage your forms by classifying them
Group [20items]	Post rank [13items]	Project [4items]	Generic master settings [6items]
Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	You can register a project. Registering will allow you to link your project to your application information	You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Select 「Register new position」

✕ If you haven't registered yet, after selecting 1, the screen 「Register new position」 in the 3rd order will appear.

The screenshot shows the 'Position list' interface. It includes a 'Register new position' button and a table of registered positions:

Code	Position name	Explanation	Position rank
All	All	All	✕
	manager		1

3. Fill in basic information of position

Register position

Register position used in you company such as Chief Director

[Show position list](#)

General Information

Position name
(required)

Input position name (required)

Position code

Input position code (Optional)

Explanation

Input position explanation (Optional)

Save

Position name	Required	Enter the registered position name.
Position code	Not mandatory	Enter the code used to distinguish the positions of registration.
		Duplicate codes cannot be registered.
		Please enter the case of registering a user by CSV.
Explanation	Not mandatory	Enter the description of the position you want to register for.

4. Click 「Save」 The position registration will be completed.

Register position

Register position used in you company such as Chief Director

[Show position list](#)

General Information

Position name
(required)

manager

Position code

23

Explanation

Input position explanation (Optional)

Update

2.2 Position Modification

The steps for changing the basic information of the registered position are as follows.

1. Select 「basic information setting」 in 「Administration Function」 on the left side and select 「Post rank」 from the list on the screen.

The screenshot shows the 'Basic Information Setting List' interface. On the left is a navigation menu with 'Basic information setting' selected. The main area displays a grid of settings:

- User** [11Items]: Register users who can use the service. Users can be associated with groups or titles.
- Route** [34Items]: Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.
- Form** [35Items]: Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.
- Form categories** [10Items]: Registering a form type allows you to manage your forms by classifying them.
- Group** [20Items]: Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.
- Post rank** [13Items]: Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings. (This option is highlighted with a red box.)
- Project** [4Items]: You can register a project. Registering will allow you to link your project to your application information.
- Generic master settings** [6Items]: You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on the position you want to modify on the screen 「Position list」

The screenshot shows the 'Position list' interface. It includes a 'Register new position' button and a table of registered positions:

Code	Position name	Explanation	Position rank
All	All	All	x
	manager		1

The 'manager' row is highlighted with a red box.

3. Edit the title you want to modify, then click 「Update」

The screenshot shows the 'Register position' form. It includes a 'Show position list' button and a form with the following fields:

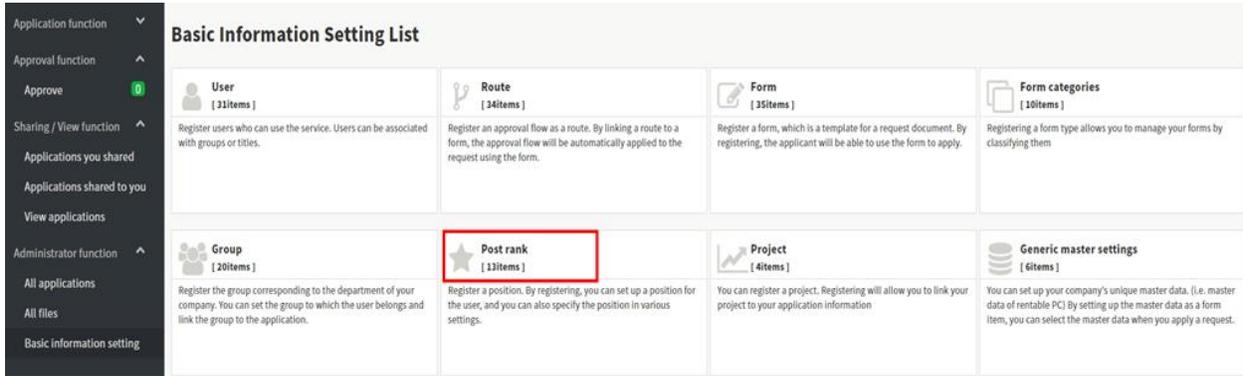
- Position name** (required): manager
- Position code**: 02 (This field is highlighted with a red box.)
- Explanation**: nput position explanation (Optional)

At the bottom right, there is a green 'Update' button highlighted with a red box.

2.3 Position Deletion

You can delete a registered form type as follows.

1. Select 「Basic information setting」 in 「Administration Function」 on the left side and select 「Post rank」 from the list on the screen.



2. Use the mouse to point to the position that you want to delete on the screen. 「Position list」

Position list

List of registered position
Register new position from the below button

[Register new position](#)

Code	Position name	Explanation	Position rank	
All	All	All	1	
	manager		1	

3. Click icon  on the right side.

Position list

List of registered position
Register new position from the below button

[Register new position](#)

Code	Position name	Explanation	Position rank	
All	All	All	X	
	manager		1	

4. If you click 「Yes」, the deletion process will be completed. ****Please note that deleted data cannot be recovered.**

Are you sure you want to delete It?

Are you sure to delete manager?

Please note that the position rank settings associated with the user will also be deleted.

Yes

No

3. User Registration (User)

A “User” in Jobcan Workflow refers to an individual who uses the system, such as an employee of the company. Once a user is registered, they can log in to the system and have the ability to submit requests and approve them.

3.1 User Registration Methods

1. Select 「Basic information setting」 in 「Administration Function」 on the left side and select 「User」 from the list on the screen.

The screenshot shows the 'Basic Information Setting List' interface. On the left, a sidebar menu is visible with 'Administrator function' expanded and 'Basic information setting' selected. The main content area is a grid of settings:

Icon	Setting Name	Item Count	Description
	User	[31 items]	Register users who can use the service. Users can be associated with groups or titles.
	Route	[35 items]	Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.
	Form	[35 items]	Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.
	Form categories	[10 items]	Registering a form type allows you to manage your forms by classifying them
	Group	[20 items]	Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.
	Post rank	[13 items]	Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.
	Project	[4 items]	You can register a project. Registering will allow you to link your project to your application information
	Generic master settings	[7 items]	You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on 「Register new user」 at the top screen of 「User list」

✖ In the case that the user has not yet been registered If 「User」 is selected in step 1, the 「Register User」 screen will appear.

The screenshot shows the 'User list' interface. It features a header 'User list' and a sub-header 'Registered user list. You can register new user from the button below.' Below this, there is a link 'To integrate user information from Google Workspace (former G Suite), click here .' and a row of five buttons: 'Register new user', 'Invite new user', 'Show stopped user', 'User import', and 'Download CSV'. The 'Register new user' button is highlighted with a red box.

3. The user registration screen will appear.

The screenshot shows the 'User registration' form. It has a header 'User registration' and a sub-header 'Register a user. If you want the user to register their own name and password, click "User Invitation". To import a user via CSV, please set it up from "User Import"'. Below this is a 'Show user list' button and a 'General Information' section with three input fields:

- Name (required)**: Input name (required) and Enter first name (required)
- Staff code**: Input staff code (optional). Enter staff code, such as staff number, to differentiate each user
- Email address (required)**: Input email (required)

4.Register 「General Information」 of the user

User registration

Register a user. If you want the user to register their own name and password, click "User Invitation".
To import a user via CSV, please set it up from "User Import"

Show user list

General Information

Name (required)

Staff code
Enter staff code, such as staff number, to differentiate each user

Email address (required)

Invitation email Send invitation email
Check the box to send invitation email to the registering user

Group Search group
Please set group that this user belongs to. Multiple setting is possible.

Post rank
Set position for this user. Multiple setting is possible

Name	Required	Enter the name of the user you want to register.
		Limitations for registration: The 「First Name」 and 「Last Name」 are within 32 characters.
Staff code	Not mandatory	Enter ID of the user such as staff code.
		Limitations for registration are within 50 characters.
		✕ The staff code cannot be used by another user.
E-mail	Required	Enter the email of the user who want to register. The user must use the email that has been set in the current configuration for login.
Invitation email	Not mandatory	In case you want to send an invitation email to the registered user,click on the checkbox. If the checkbox is clicked and the user registers ,an invitation email will be sent.
Group	Not mandatory	Please click on search and select the group to which the user belongs.
		Multiple groups can be selected.
Post rank	Not mandatory	The user can select multiple positions.
		You can link the position information to the group.

5. Configure user system limitations.

Authority : It is the process of defining the scope of usage for each user. Each authority will vary in terms of the system’s functions and detailed usage , as specified in the table below.

Authority
Only functions such as application and approval are available. (This applies to general employees.)

Authority code	1	2	3	4	5	6	7
Functions	Admin	Manager	Normal User	System Manager	Accountant	Human resource officer	Request manager
Application function							
Apply	✓	✓	✓	✓	✓	✓	✓
My application	✓	✓	✓	✓	✓	✓	✓
My files	✓	✓	✓	✓	✓	✓	✓
Approval function							
Approve	✓	✓	✓	✓	✓	✓	✓
Sharing / View function							
Applications you shared	✓	✓	✓	✓	✓	✓	✓
Applications shared to you	✓	✓	✓	✓	✓	✓	✓
View applications	✓	✓	✓	✓	✓	✓	✓
Administrator function							
All applications	✓	✓	✗	✗	✗	✗	✓
All files	✓	✓	✗	✗	✗	✗	✗
Basic information setting	✓	✓	✗	✓	✓	✓	✗
User	✓	Adding/changing Admin authority is not allowed.	✗	Create a user with only "Normal User" and "System Management" authority. Changing Admin authority is not allowed.	✗	Create a user with only "Normal User" and human resource officer authority. Changing Admin authority is not allowed.	✗
Route	✓	✓	✗	✓	✗	✗	✗
Form	✓	✓	✗	✓	✗	✗	✗
Form categories	✓	✓	✗	✓	✗	✗	✗
Group	✓	✓	✗	✓	✗	✓	✗
Post rank	✓	✓	✗	✓	✗	✓	✗
Project	✓	✓	✗	✓	✗	✗	✗
Genetic master data	✓	✓	✗	✓	✗	✗	✗

Request referable form | Search form

All requests created with the forms set here will be viewable. Multiple setting is possible.

Approver | Set as approver
Check the box to set approvers of this user.

Request editor | Set as request editor
Check the box to set restriction for editing request detail on this user.

Request referable form	Not require. You can configure the forms that users can reference.
Approver	Select whether the user is an approver or not
	The users selected in this field will be displayed as 「Group approver」
Request editor	Select whether the user is a request editor or not. The users selected in this field will be able to edit the content of the request. **Please note that the "Request Editor" feature is available only in the paid plan.

6. The Setting in 「Proxy Setting」 set another user as an agent to send requests or approve if using the request function instead. Users who are unable to submit requests themselves for reasons such as being busy or out of work. will be able to allow other users to set ability to be an agent for submitting requests / approvals instead.

Proxy settings ^

Apply by proxy | [+Add proxy application setting](#)
Select 'proxy requester' for this user

Approve by proxy | [+Add proxy approval setting](#)
Select 'proxy approver' for this user

7. After completing the settings and entering the necessary information , click 「Save」 To complete the user registration.



4. Registering a workflow (Route)

The route of Jobcan Workflow 「Approval Flow」 is the company's approval process that can be configured with various conditions. Once the approval flow is set up and registered, when a request is submitted in a form, It will follow the approval flow that has been registered. After registering the approval flow, it can be used for multiple forms, allowing the same approval flow to be applied to various forms.

4.1 How to register a route

1. Select 「Basic Information Setting List」 in 「Administrator Function」 on the left side and select 「Route」 from the list on the screen.

Basic Information Setting List

 User [31Items] Register users who can use the service. Users can be associated with groups or titles.	 Route [35Items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	 Form [35Items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	 Form categories [10Items] Registering a form type allows you to manage your forms by classifying them
 Group [20Items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	 Post rank [13Items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	 Project [4Items] You can register a project. Registering will allow you to link your project to your application information	 Generic master settings [7Items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Select 「Register New Route」 at the top

※ In case there has been no registration at all, once you select 「Route」 in step 1, 「Register New Route」 screen will appear immediately in step 3.

Route list

This is the registered route list. Add new route by clicking the button below.
Registered route can be used with multiple forms
Drag and drop the route to change the order of this list

Register new route

CSV upload

CSV Sample

Download CSV

3. Fill in basic information of the route

Register route

Set approver for each step and create approval route
Registered route can be set in multiple forms

Show route list

General Information

Route name (required)

Route code

Explanation

Viewer [Set viewer](#)

Route name	Required	Input route name
Route code	Not mandatory	Input route code
Explanation	Not mandatory	Add a route explanation
Viewer	Not mandatory	Users can be set up to be able to monitor the route.

4. Step setting of the route

「Step」 refers to the approval sequence.

Step setting

Add step to approval step using the '+' button

1 **Step name** (required) + -

Select user Select group/position ⓘ Select top group/position ⓘ Select when making request ⓘ Requester

Approver (required)
Select user that will be the approver for this step

All required approvals
 Excluding the applicant themselves

Step name	Input the name of the step.
Approver	You can select the conditions of the approver you want to configure in that order, as desired.

Click  You can add the step of approval. Click  You can delete the step of approval.

There are 5 ways to configure approvers for each approval sequence.

- ① Select user
- ② Select group/position
- ③ Select top group/position
- ④ Select when making request
- ⑤ Requester

1. Select user

You can directly assign users in the approval step, and you can select multiple names. ****However, you cannot select users who do not have the authority to be an approver.**

Step setting

Add step to approval step using the '+' button

1

Step name
(required)




Approver
(required)

Select user that will be the approver for this step

Select user
 Select group/position ⓘ
 Select top group/position ⓘ
 Select when making request ⓘ
 Requester

All required approvals

Excluding the applicant themselves

Settings In this format You can select one of the conditions below.

<input type="checkbox"/> All required approvals	To approve all without specific order, check the box (✓). If you want a single person to approve, then move to the next approval level without checking the box.
<input checked="" type="checkbox"/> Excluding the applicant themselves	To exclude, put a checkmark (✓) if the requester is one of the approvers. **Applicable only for approval steps with multiple approvers.

【Example】

From the image, choose whether, in step 1, users who can approve are both Mr.E and Mr.B. If either one approvers, the flow will proceed to the next step.

Add step to approval step using the '+' button

1

Step name
(required)

+ -

Approver
(required)

Select user
 Select group/position ⓘ
 Select top group/position ⓘ
 Select when making request ⓘ
 Requester

Praew Test

test test

Search users

Clear

All required approvals

Excluding the applicant themselves

Result: The approvers that will be shown in this step of the approval flow are Mr.E and Mr.B.

Approval steps

Applicant's post rank : President ▼

Reflect the latest application route

1

All required approvals

Step name : Step 1 : Supervisor

Approver : E Mr.

Approver : B Mr.

2. Select group/position

You can set the approver based on the selected group and position. To use this condition, it is necessary to establish a linkage between the user and the group and position first. After that, you can configure the approver by dividing the group levels. You have the option to set the approver to be 「Affiliated with a higher-level group」 or use the position hierarchy and set it as 「Higher-level position」 or 「Lower-level position」

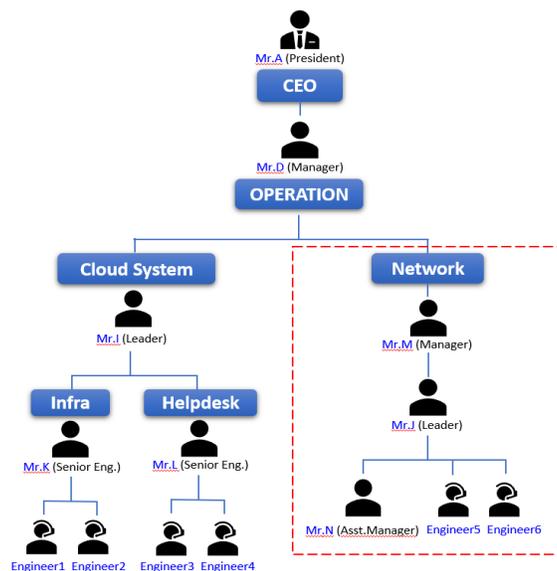
Settings In this format You can select one of the conditions below.

<input type="checkbox"/> All required approvals	To approve all approvers without a specific order, please mark the checkbox (✓). This will advance the workflow to the next approval step without requiring individual approvals. If you want a specific person to approve, simply leave the checkbox unchecked. The workflow will then proceed to the next approval step once that designated person approves it.
<input checked="" type="checkbox"/> Excluding the applicant themselves	To exclude the requester from the list of approvers, please mark the checkbox(✓) if requestor is also one of the approvers. **This only applies to approval steps with multiple approvers.

Skip condition

<input type="checkbox"/> If no approvers that satisfy the criteria above	To skip an approval step if there are no approvers who meet the specified conditions in that step, please mark the checkbox(✓)
<input type="checkbox"/> If the requester has a position that is higher than Leader	To skip an approval step if the position of the requester is higher than or equal to the selected position, please mark the (✓).

【Example】



Example condition 1 : Set the approver in step 1 to be the approver in the **network** group, holding the position of **leader**.

Result: The approver to be shown in this approval flow step is Mr. J.

The configuration interface for Step 1 shows the following settings:

- Step name: Step 1
- Selection method: Select group/position
- Group: Network
- Post rank: Leader
- Post rank dropdown: - approver in this position

The resulting approval step configuration is:

- Step name: Step 1
- Approver: J Mr.

Example condition 2 : The approver configuration in step 1 is the approver within the **network** group with the position of **leader or higher**.

Result: The approvers who will be shown in this approval flow step are Mr.J and Mr.M.

The configuration interface for Step 1 shows the following settings:

- Step name: Step 1
- Selection method: Select group/position
- Group: Network
- Post rank: Leader
- Post rank dropdown: - Approvers of the position rank above

The resulting approval step configuration is:

- Step name: Step 1
- Approver: J Mr.
- Approver: M Mr.

Example condition 3: The approver configuration in step 1 is the approver within the **network** group with the position of **leader or Lower**.

Result: The approvers who will be shown in this approval flow step are Mr. J and Mr.N.

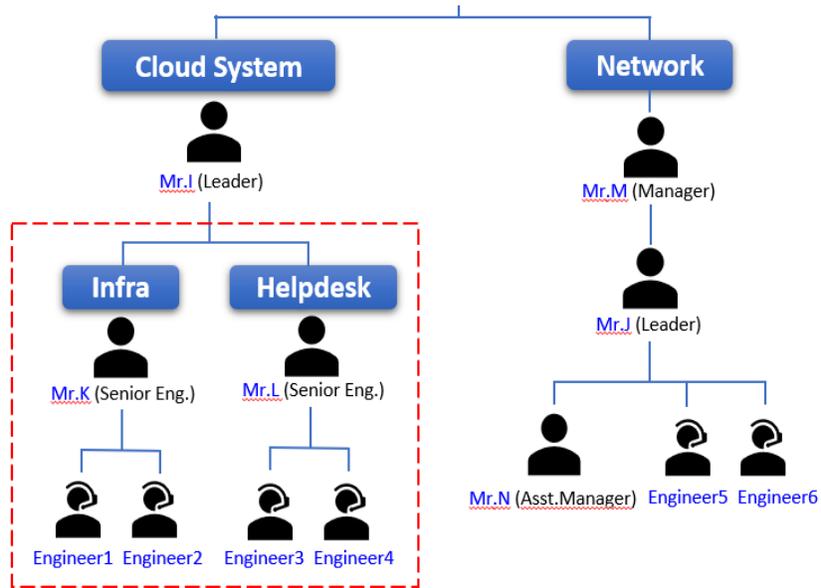
The configuration interface for Step 1 shows the following settings:

- Step name: Step 1
- Selection method: Select group/position
- Group: Network
- Post rank: Leader
- Post rank dropdown: Approvers of the position rank below

The resulting approval step configuration is:

- Step name: Step 1
- Approver: J Mr.
- Approver: M Mr.

【Example】



Example condition : The approver settings for step 1 are the approvers within the group of the requester, in the position of senior engineer.

1 Step name (required)

Select user
 Select group/position ⓘ
 Select top group/position ⓘ
 Select when making request ⓘ
 Requester

Group

Approver (required)
 Post rank

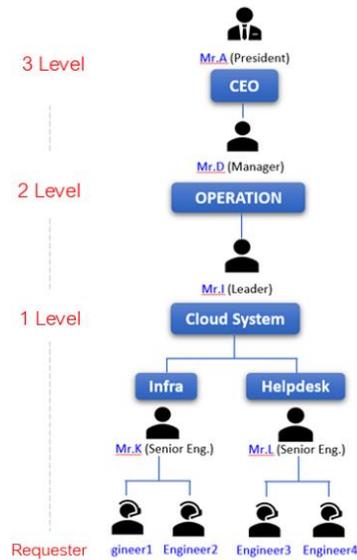
Result If the requester is engineer1, the approver to be shown in the approval workflow for this step is Mr. K.

If the requester is engineer1, the approver to be shown in the approval workflow for this step is Mr. L.

3. Select top group/position

If linking positions with groups, it is possible to set higher-level positions and groups for the group to which the requester belongs.

【Example】



Example condition 1 : Setting the approvers in step 1 to be all the approvers who are in groups with a higher level of hierarchy by at least 2 levels.

1 Step name (required) Step 1

Select user
 Select group/position
 Select top group/position
 Select when making request
 Requester

Approver (required) 2 Layer **Belong to a higher group**

All approvers
 All required approvals
 Excluding the applicant themselves

Skip condition If no approvers that satisfy the criteria above

Result: If the requester is engineer 1, the approver who will be shown in the approval flow for this step is Mr.D

Approval steps- Applicant's post rank : engineer

Reflect the latest application route

1 Need one approval

Step name : Step1

Approver : D Mr.

Example condition 2 : Setting the approvers in step 1 to be all the approvers who are in groups with a higher level of hierarchy by at least 2 levels.

Result: If the requester is Engineer 1, the approver who will be shown in the approval flow for this step is Mr. D. and Mr.A

Settings In this format You can select one of the conditions below.

<input type="checkbox"/> All required approvals	To approve all approvers without a specific order, please mark the checkbox (✓). This will advance the workflow to the next approval step without requiring individual approvals. If you want a specific person to approve, simply leave the checkbox unchecked. The workflow will then proceed to the next approval step once that designated person approves it.
<input checked="" type="checkbox"/> Excluding the applicant themselves	To exclude the requestor from the list of approvers, please mark the checkbox (✓) If the requestor is also one of the approvers. **This only applies to approval steps with multiple approvers.

Skip condition

<input type="checkbox"/> If no approvers that satisfy the criteria above	To skip an approval step if there are no approvers who meet the specified conditions in that step, please mark the checkbox (✓).
--	--

4. Select when making request

You can configure to allow selecting from all available approvers when the requester submits the request.

【Example】

1 **Step name** (required)

Select user
 Select group/position ⓘ
 Select top group/position ⓘ
 Select when making request ⓘ
 Requester

Approver (required)

Group:

Post rank:

If multiple approvers are selected when making request, approval from all of them are required
 Excluding the applicant themselves

Requester: You need to designate approvers when submitting the request.

Approval steps Applicant's post rank :

Reflect the latest application route

1 Need one approval + -

Step name : Step1

Select a user

Search approvers ×

Page 1 / 1 ← →

Phathumma Panthitra (panthitrap@donuts-bkk.com)

Songsermsit Piyabhon (piyabhons@donuts-bkk.com)

5. Requester

Requester : You can set up to approve the request yourself.

1 Step name (required)

Approver (required)

Select user
 Select group/position ⓘ
 Select top group/position ⓘ
 Select when making request ⓘ
 Requester

✘ You can set up a requester who does not have the authority to be an 「approver」 as an approver.

This setting can be configured during the request submission, not just limited to the route set up.

✘ Click on 「Edit Approval route」 at the bottom right of the 「Approval route」 section. This is only applicable when 「Edit route」 is permitted in the form settings.

4.2 Editing a workflow (Route)

You can change the order of the route and their names. If you change the order in the middle, the workflows for the requests that have already been submitted will not be affected and will remain unchanged.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Route」 from the list on the screen.

2. Click on the route you want to modify in the 「Route list」

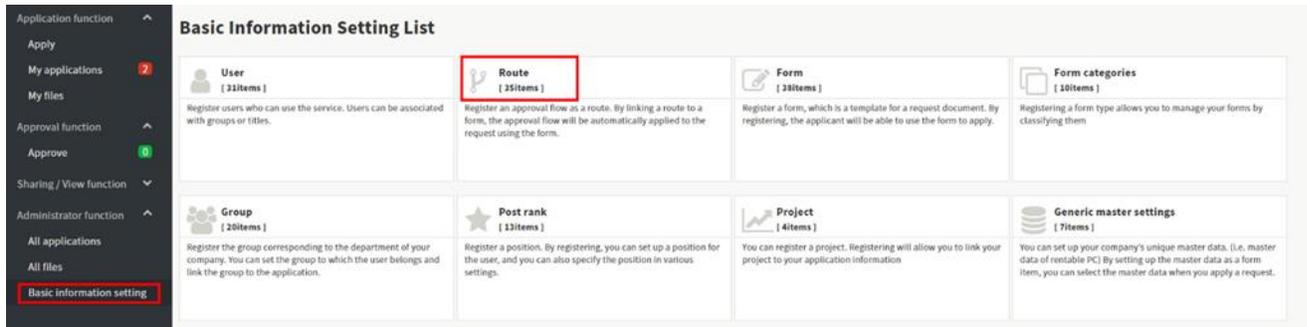
Basic Information Setting List

User [31Items] Register users who can use the service. Users can be associated with groups or titles.	Route [35Items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [28Items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [10Items] Registering a form type allows you to manage your forms by classifying them.
Group [20Items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13Items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4Items] You can register a project. Registering will allow you to link your project to your application information.	Generic master settings [7Items] You can set up your company's unique master data. (i.e. master data of reusable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

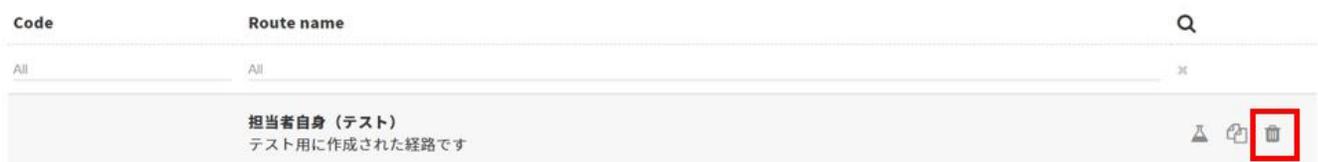
4.3 Deleting a workflow

You can delete routes that you have created, but you cannot delete route that have been set up in a form.

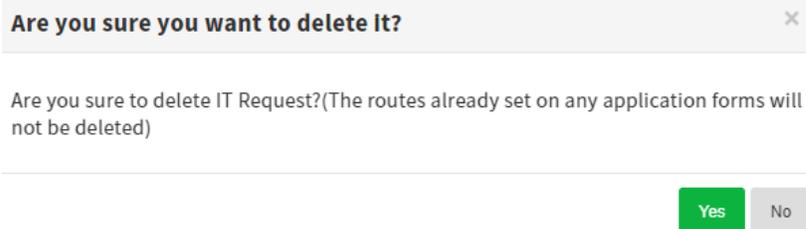
1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Route」 from the list on the screen.



2. To delete a route, hover your mouse over the route you want to delete on the screen. 「Route list」



3. Click on the icon  located on the right. Please note that once you delete the data, it cannot be retrieved.
4. Once you click 「Yes」 the deletion process will be completed, and a message will appear at the bottom of the screen.



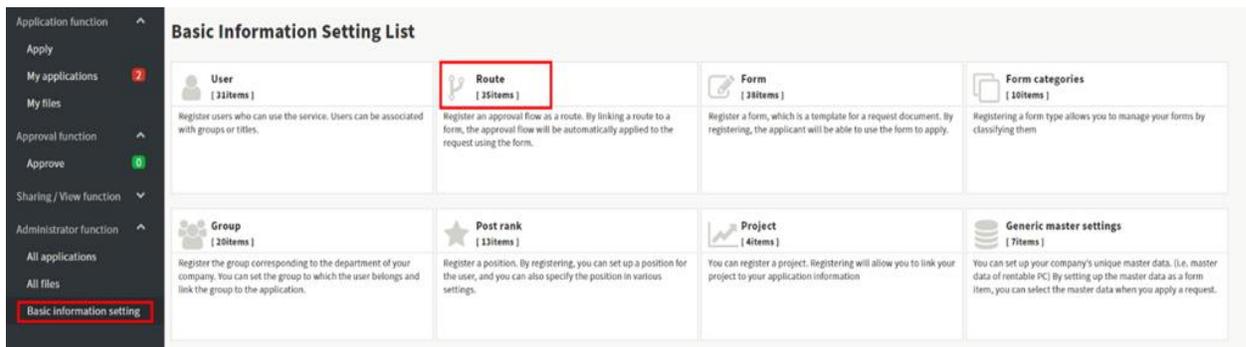
In the case where you attempt to delete a route that is connected to a form (request form), you will receive the following notification, and the deletion cannot proceed.



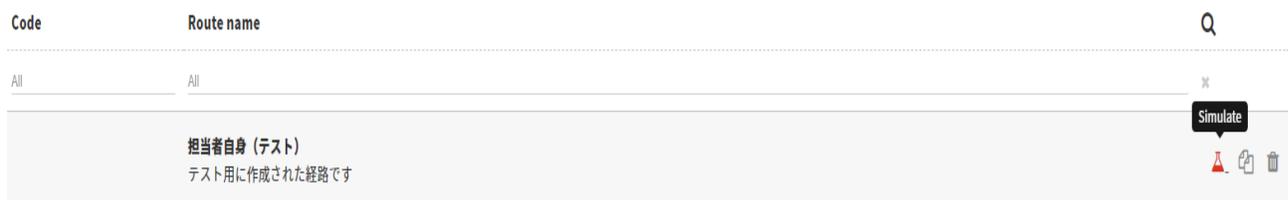
4.4 Simulating a route

In the case of submitting a request using a pre-existing workflow, you can simulate and see which users are the approvers in the approval workflow.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Route」 from the list on the screen.

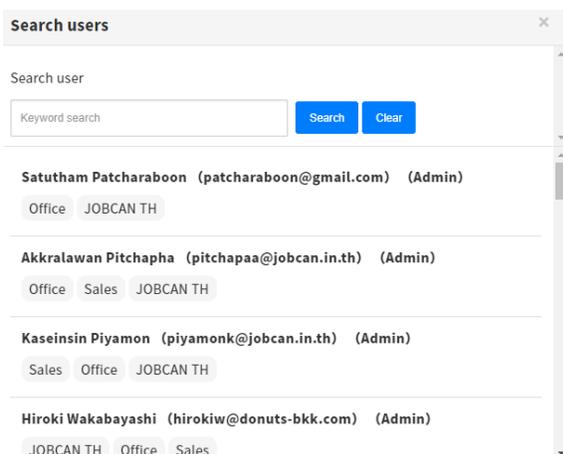


2. Point your mouse to the route you want to simulate on the screen. 「Route list」



3. Click on icon  in the right side.

4. The 「Search User」 bar will appear. Select the users you want to check as approvers in the approval workflow when submitting the request.



5. In the case where the user selected to submit the request. the displayed approvers in the approval workflow will be shown separately based on the approval sequence.

Jobcan th ✕

The following is a list of potential approvers when Satutham Patcharaboon uses this approval path.

Group at time of application	Position at time of application	step1	Account
Office	Manager	Satutham Patcharaboon Akkralawan Pitchapha Pa Wimwipakorn Phathumma Panthitra Jobcan Praew	Songsermsit Piyabhon
JOBCAN TH		Satutham Patcharaboon Akkralawan Pitchapha Pa Wimwipakorn Phathumma Panthitra Jobcan Praew	Songsermsit Piyabhon

Confirm

Group during submission.	<p>Displaying groups during request submission.</p> <p>In the case where the requester belongs to multiple groups, the approvers for the request will be displayed based on each respective group.</p>
Post rank during submission	<p>The position of the requester will be displayed when submitting the request.</p> <p>In case the requester holds multiple positions, the approvers for the request will be displayed based on each of those positions.</p>
Order	<p>Displaying the approvers for each configured level in the route.</p> <p>If the icon is displayed, it indicates that there is no approver who meets the conditions, causing an error when submitting the request.</p>

4.5 Copying a workflow

A route can be copied, edited and registered as another route.

1. Select **Basic Information Setting** in **Administrator Function** on the left side and select **Route** from the list on the screen.

2. Point your mouse to the route you want to simulate on the screen. 「Route list」

Code	Route name	Q
All	All	X
	担当者自身 (テスト) テスト用に作成された経路です	Copy 🔍 🗑️

3. Click on the  icon on the right.

4. To move to the page for creating a new flow with the same content, you can click on the flow name that has the word 「copy :」 appended to it. After that, you can make the necessary modifications and save the changes.

Register route

Set approver for each step and create approval route
Registered route can be set in multiple forms

Show route list

General Information

Route name
(required)

Route code

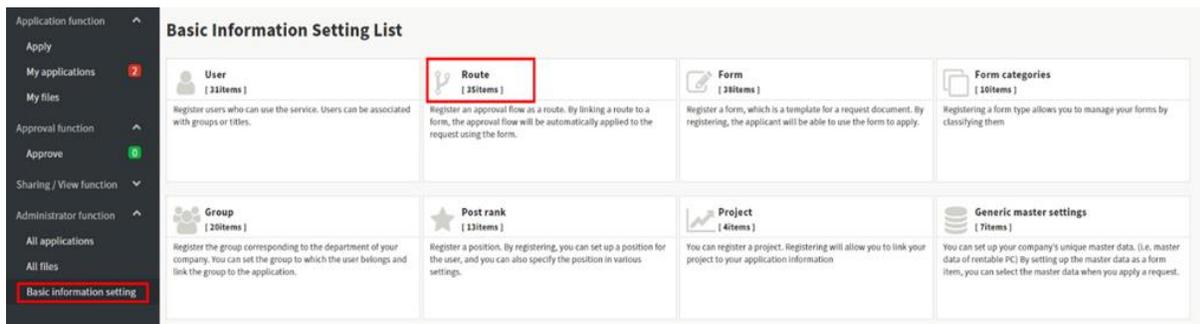
Explanation

Viewer

4.6 Sorting route

You can arrange the route that have been created in the order you want for display.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Route」 from the list on the screen.



Basic Information Setting List

User [21Items] Register users who can use the service. Users can be associated with groups or titles.	Route [25Items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [26Items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [10Items] Registering a form type allows you to manage your forms by classifying them.
Group [20Items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13Items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4Items] You can register a project. Registering will allow you to link your project to your application information.	Generic master settings [7Items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on the route you want to re-order on the 「Route List」 screen and hold it. Then,drag it up or down to the desired position.

Route list

This is the registered route list. Add new route by clicking the button below.
Registered route can be used with multiple forms
Drag and drop the route to change the order of this list

Register new route CSV upload CSV Sample Download CSV

Code	Route name	
All	All	Q
	担当者自身 (テスト) テスト用に作成された経路です	×
Op-001	Jobcan th	👤 📄 🗑️

3. After moving the flow, click 「Save this order」 at the bottom,and the updated flow order will be saved.

Route list

This is the registered route list. Add new route by clicking the button below.
Registered route can be used with multiple forms
Drag and drop the route to change the order of this list

Register new route CSV upload CSV Sample Download CSV

Code	Route name	
All	All	
	担当者自身 (テスト) テスト用に作成された経路です	
Op-001	Jobcan th	
ACC	ACC	
001	Test	
	เบิกวัสดุ	
123	ขอเบิกค่าเดินทาง	
	ตรวจแบบ สำหรับยื่นสื่อทำออกกอง เฉพาะทีม A	
	ส่งเอกสาร	

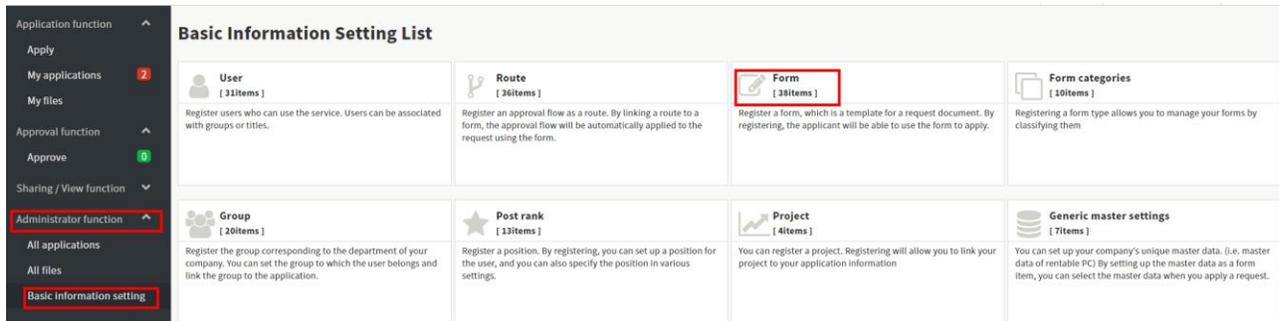
Save this order

5. Registering Forms

The form refers to a request form in the jobcan workflow system. It can be customized to match specific requirements of the company. Once the form is registered, It can be used to create specific request forms and submit requests accordingly.

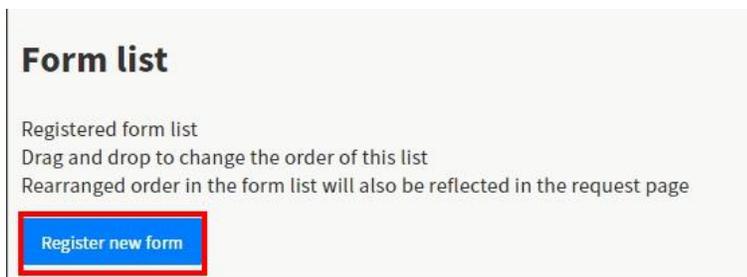
5.1 Registering Forms

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.



2. Click 「Register New Form」 at the top of the Form List page.

※If you do not register and select 「Form」 in Step 1, the 「Register New Form」 page will immediately appear in Step 3.



3. General Settings for the Form are as follows:

Form name	Require	Input form name
Form explanation	Not mandatory	You can add a description for the form. The content entered will serve as a description of the form, and the requester will be able to review it before submitting the request.
Route	Require	Select the route you want to register as the approval flow for this form from all the flows created.

View Permission	Not mandatory	<ul style="list-style-type: none"> ➤ Sharing: All users can access the form. ➤ Not Sharing : No users can access the form (for forms that are still being created and are not ready for use). ➤ You can configure the user access scope for the form based on groups/positions or the time period during which the form will be published.
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4. You can add or modify key headings in the request form under 「Item Setting」 Click the icon  to add a new heading.

Item setting

New item

Please enter

+

5. After clicking “add Item” a screen will appear for configuring the form heading. The default heading type is set as a single-line text with the name New Heading as shown in the image below.

For the heading name and properties, you can customize them as desired. You can also set whether it’s required or optional to fill in.

Once you’ve configured the heading, click 「Set」 and the entered heading will have an impact on the form.

Form Item setting ✕

Item type Single-line text ▼

Item name (required) New item

optional/required Required

Character limit No Fixed ⓘ Range setting ⓘ

Input format No restriction Must be alphabets and numbers ⓘ

Unit number of items, people, etc.
Set information such as unit to display on the right of items

annotation Input additional explanation

[Set Option Setting ⓘ](#)

Delete
Set
Close

Types of headings that can be added to the form include

Types of headings	An example of how information is displayed on the displayed on the request from page is as follows.						
Single-line text	First-Last name <input type="text" value="Please enter"/>						
Multiple-line text	Multiple-line text <input type="text" value="Please enter"/>						
Number item	ID card number <input type="text" value="Enter the number"/>						
Date selection	Date <input type="text" value="yyyy/mm/dd"/>						
Select month	month <input type="text" value="Select year"/> <input type="text" value="Select month"/>						
Radio button	Radio button <input checked="" type="radio"/> A <input type="radio"/> B <input type="radio"/> C <input type="radio"/> D						
pulldown menu	Pulldown <input type="text" value="--- กรุณาเลือก ---"/>						
Checkbox	Check box <input type="checkbox"/> A <input checked="" type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D						
Request selection	Request selection <input type="text" value="Search applications"/> <input type="button" value="x"/>						
User selection	User selection <input type="text" value="Search user"/> <input type="button" value="x"/>						
Select a group	Select a group <input type="text" value="Search groups"/> <input type="button" value="x"/>						
Select a project	Select a project <input type="text" value="Search projects"/> <input type="button" value="x"/>						
Generic master data selection	Generic master data selection <input type="text" value="Search master data"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>						
Attachment selection	Attachment File (required) <input type="button" value="Select file"/>						
Headline	Main headline-travel requisition						
Explanation	JOBKAN provides 3 services as follows: 1. Attendance Management is managing the time in and out of employees. 2. Workflow is an online company's document management system. 3. Payroll is an online employee salary calculation system. Helps to calculate salary and employee taxes every month if the customer is interested. for testing the system ask for service fee or other additional information Please contact Line official ID: @jobcan or Tel.02-107-1867						
Statement	Borrowed Items <table border="1"> <thead> <tr> <th>Order</th> <th>Borrowed Items</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <input type="button" value="Print"/>	Order	Borrowed Items	Amount			
Order	Borrowed Items	Amount					

Time	Time <input type="text" value="HH"/> : <input type="text" value="MM"/>
Calculation	Purchase item <input type="text" value="Input amount"/> × <input type="text" value="Input Unit price"/>

6. You can use the 「Form Item setting」 feature for requests to configure the default topic that will be included when setting up this form. If you set the request topic, it will automatically appear in the topic field when submitting the request.

Form Title Setting

Enter Permission Permit Not permit
 You can set whether or not to allow the applicant or the editor to edit the title when applying or adjusting

Initial Value
 Set default title when making request

7. You can configure other setting of the form in the section of 「Detail setting」

Detail setting

You can set more form details ^

Form categories Select form type (Optional)

Explanation file
 Selected file can be downloaded as reference for the request

Edit route (requester) Can add/delete Add only Not permit
 Set if requester can edit route when making request or not

Edit route (approver) Add only Not permit
 Set if approver can edit route for requests that are in process or not

Edit viewer Permit Not permit
 Set if requester can edit list of users who can view the request or not

Numbering method Common request number Request number for each form
 You can set if you'd like to number request ID for each form or not

The configuration of details can be set according to the following options. The displayed headings may vary depending on the format of the form.

Title	Detail
Form categories	If there are categories available, you can configure the type of the form.
	If configured, the request form will be displayed based on its type during submission, making it easier for the requester to locate the appropriate form.
	You can configure Form 1 to have multiple types of form formats.
Explanation file	You can attach reference documents related to the submission process, and the requester will be able to review the attached files when submitting the request.
Edit route (requester)	You can configure the request submission settings to allow the requester to either add or remove route modifications, grant permission for adding modifications only, or disallow any modifications.
Edit route (approver)	You can configure the approval settings to allow approvers to add comments or not allow them to make changes.
Edit viewer	You can configure whether the authorized reviewers can be edited when submitting a request or not.
Numbering method	You can choose how to arrange the ID numbers when submitting requests. You can either arrange them starting from 1 for all forms combined, or arrange them starting from 1 for each individual form.
	If you choose 「Request number for each form」 a field will appear for entering the ID to be used in that request form. Please set the ID using English letters and numbers, for example, IT001.
Items with time-limit approval	You can configure whether the requester is allowed to set the approval deadline and submit the request after approval
	If you choose to allow this, the field for setting the approval deadline will appear when submitting the request.
File attachment	You can configure whether it is required to attach files when submitting a request or not. If set as required , submitting a request without attaching files will not be possible. If you choose not to make it necessary , the file attachment section will not appear
Related group item	You can configure whether the option to select related group headings should appear When submitting a request or not. If set to appear, you can also further configure whether it is required or not to select a group heading.
Related project item	You can configure whether the option to select related group headings should appear When submitting a request or not. If set to appear, you can also further configure whether it is required or not to select a project heading.
Cloud Sign	✕The display of contract files related to cloud sign can be configured to appear only when selecting a versatile form. You can also set whether to display these contract files and further configure whether their presence is necessary or not.

Approver's information	In the approval flow during the submission of a request or in the approval status after submitting a request, In the field for the approver's name, you can choose whether to display the position or group to which the approver belongs. ✖The display of groups or positions will only be shown for approvers who hold a specific position.
The currency of the total amount	You can specify the currency unit to be used in the "Total counting in" menu.

- After completing the configuration,click 「save」 on the 「Register form」 screen. The form then be successfully registered.

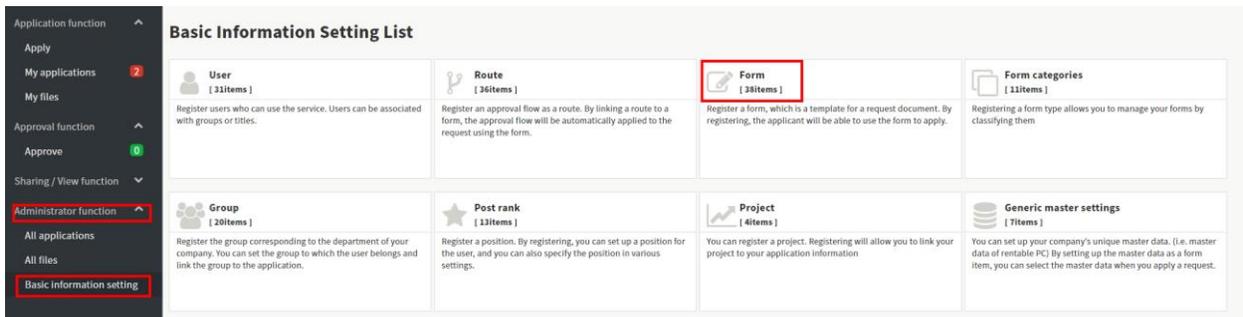


5.2 Editing a form

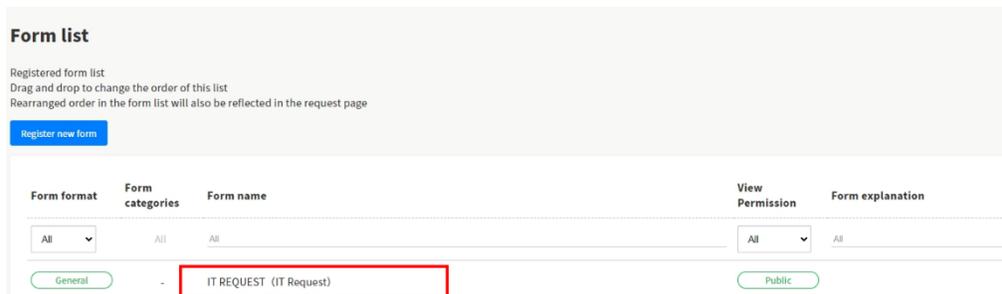
In the case where you need to modify the configured headers or change the name of a registered form,you can make edits accordingly.

****Request submitted using a specific form will not be altered after submission, and any modifications will not affect ongoing or saved requests. However, when exporting CSVdata for requests, only [the headers configured in the form will appear]. Please be cautious.**

- Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen



- Click on the form you want to edit on the screen. 「Form list」



3.The screen [Register Form] will appear for you to make edits. However, it's not possible to change the [Form Format] of a form that has already been registered.

Register form

'Form' means the prescribed document that can be chosen when creating a request
Set items and routes for each form as needed

Show form list

General setting

Form format Generic form Expense settlement Payment request

Form name
(required)

Form explanation

Route (required)

Disclose Set as private Set and disclose users and period

4. After making the edits,click on [Update] in the [Register Form] screen. The configuration Changes will take effect.

Update

5.3 Deleting a form

Deletion will not affect requests that are in progress or requests that have been saved. Even if a form is deleted, requests that have already used that form will not be deleted.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.

Basic Information Setting List

<p>User [31Items]</p> <p>Register users who can use the service. Users can be associated with groups or titles.</p>	<p>Route [36Items]</p> <p>Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.</p>	<p>Form [38Items]</p> <p>Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.</p>	<p>Form categories [11Items]</p> <p>Registering a form type allows you to manage your forms by classifying them</p>
<p>Group [20Items]</p> <p>Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.</p>	<p>Post rank [11Items]</p> <p>Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.</p>	<p>Project [4Items]</p> <p>You can register a project. Registering will allow you to link your project to your application information.</p>	<p>Generic master settings [7Items]</p> <p>You can set up your company's unique master data. (i.e. master data of reusable IFC) By setting up the master data as a form item, you can select the master data when you apply a request.</p>

2. Use the mouse to point to the form you want to delete on the form list screen.

Form format	Form categories	Form name	View Permission	Form explanation
All	All	All	All	All
General	-	IT REQUEST (IT Request)	Public	

3. Click on the icon  that appears on the right side.

4. A confirmation dialog will appear. Click [Yes] and the form will be deleted. The data associated with the deleted form cannot be restored to its original state.

Are you sure you want to delete it? ×

Are you sure you want to delete the IT REQUEST? (Deleting the form does not affect past applications made on this form.)

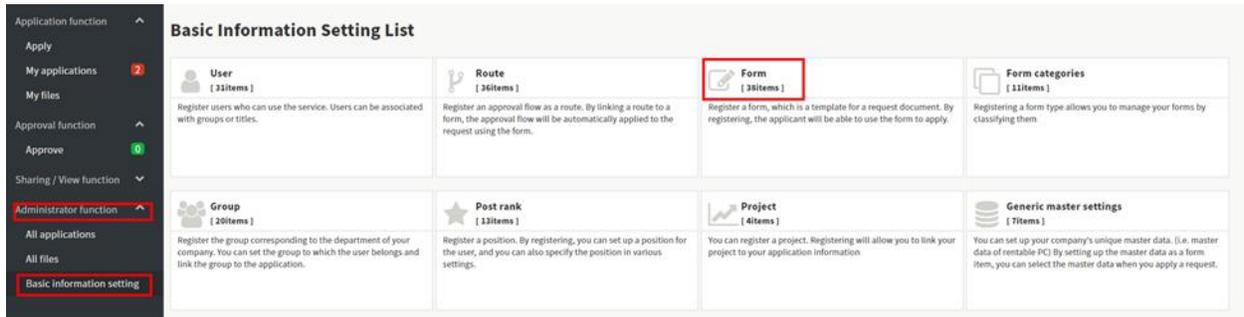
Even if a form is deleted, the requests that have been submitted using that form will not be deleted. Deleting a form will not affect requests that are currently in progress, requests that have been saved, or requests that have been returned.

****In case you have copied a past request and wish to submit it again, if the form associated with that request has been deleted, you will not be able to copy and submit it anew.**

5.4 Copying a form

You can duplicate a form that has been created, make modifications to it, and register it as a different form.

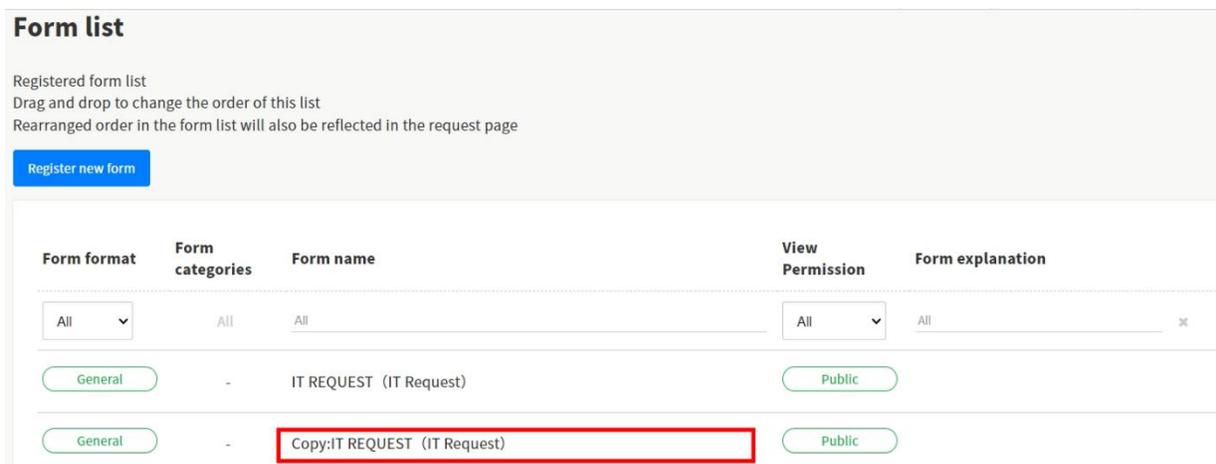
1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.



2. Use the mouse to point to the form you want to duplicate on the screen. 「Form list」

Form format	Form categories	Form name	View Permission	Form explanation
All	All	All	All	All
General	-	IT REQUEST (IT Request)	Public	

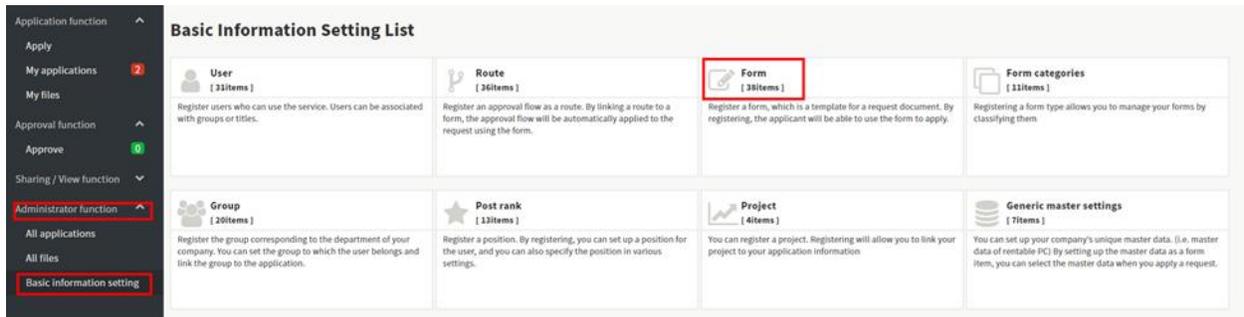
3. Click on the icon that appears on the right side.
4. The screen will change to the form creation page with the same content. The word [copy:] will appear in the form name. Make the necessary changes to the content and then save it.



5.5 Sorting a form

You can arrange the order of the forms you have created to be displayed in the desired sequence. If you arrange the order on the 「Submit Request」 page, the forms will be displayed according to the saved sequence.

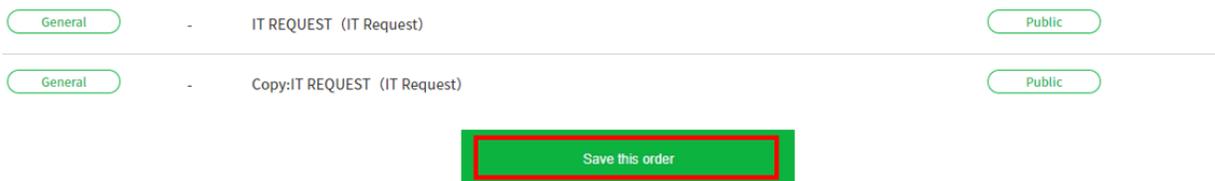
1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.



2. Click on the form you want to reorder on the 「Form list」 page, then drag it from the top to the bottom according to your preferred sequence.

Form format	Form categories	Form name	View Permission	Form explanation
All	All	All	All	All
General	-	IT REQUEST (IT Request)	Public	
General	-	Copy:IT REQUEST (IT Request)	Public	

3. After rearranging the flows, click on 「Save this order」 at the bottom, and the changed sequence will be saved.



6. Registering Form Categories

The form category refers to organizing request forms based on categories. If you configure form categories, you can display request forms categorized according to their form types.

6.1 Registering Form Categories

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.

Basic Information Setting List

User [31 items] Register users who can use the service. Users can be associated with groups or titles.	Route [36 items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [39 items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [11 items] Registering a form type allows you to manage your forms by classifying them.
Group [20 items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13 items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4 items] You can register a project. Registering will allow you to link your project to your application information.	Generic master settings [7 items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on 「Register new type」 at the top. In case there has been no registration before, once you select one and complete it, the page 「Register form type」 will appear.

Form type list

Registered form type list
Register new form type from the button below

[Register new type](#)
[CSV upload](#)
[CSV Sample](#)
[Download CSV](#)

Form type name : Travel expenses Code : TE
Form type name : เบิกค่าเดินทาง Code : Test-002
Form type name : Gasoline Code : Gas

3. Enter the basic information for the form category.

Register form type

Form type can be registered. You can manage your forms by types after registration.

Show form type list

Form type name (required)

Form type code

Parent form type
If you are managing form types by layers, Please set 'parent' type for this form type

Save

Form type name	Input form type name
Form type code	Input form type code
	✕ Registering duplicate codes is not allowed.
Parent form type	Setting up hierarchy levels for form categories is possible.

4. Click 「Save」 will complete the registration of the form category.

Register form type

Form type can be registered. You can manage your forms by types after registration.

Show form type list

Form type name (required)

Form type code

Parent form type
If you are managing form types by layers, Please set 'parent' type for this form type

Save

6.2 Editing Form Categories

You can change the name or code of a registered form category.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.

Basic Information Setting List

User [11Items] Register users who can use the service. Users can be associated with groups or titles.	Route [26Items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [39Items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [11Items] Registering a form type allows you to manage your forms by classifying them.
Group [20Items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13Items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4Items] You can register a project. Registering will allow you to link your project to your application information.	Generic master settings [7Items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on the form category that you want to edit on the screen. 「Form type list」

Form type list

Registered form type list
Register new form type from the button below

[Register new type](#)
[CSV upload](#)
[CSV Sample](#)
[Download CSV](#)

Form type name : Travel expenses Code : TE
Form type name : เบิกค่าเดินทาง Code : Test-002
Form type name : Gasoline Code : Gas
Form type name : ไข่มุกทางบัญชี Code : 0088

3. Edit the title you want to change and then click 「Update」

Register form type

Form type can be registered. You can manage your forms by types after registration.

Show form type list

Form type name
(required)

ใบเบิกทางบัญชี

Form type code

0099

Parent form type

Select form type

If you are managing form types by layers, Please set 'parent' type for this form type

Update

6.3 Deleting Form Categories

You can delete the registered form types.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Form」 from the list on the screen.

Basic Information Setting List

<p>User [11items]</p> <p>Register users who can use the service. Users can be associated with groups or titles.</p>	<p>Route [16items]</p> <p>Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.</p>	<p>Form [39items]</p> <p>Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.</p>	<p>Form categories [11items]</p> <p>Registering a form type allows you to manage your forms by classifying them</p>
<p>Group [20items]</p> <p>Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.</p>	<p>Post rank [13items]</p> <p>Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.</p>	<p>Project [4items]</p> <p>You can register a project. Registering will allow you to link your project to your application information</p>	<p>Generic master settings [7items]</p> <p>You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.</p>

2. Click on the form category that you want to edit on the screen. 「Form type list」

Form type list

Registered form type list
Register new form type from the button below

Register new type CSV upload CSV Sample Download CSV

Form type name : Travel expenses
Code : TE

Form type name : เบิกค่าเดินทาง
Code : Test-002

Form type name : Gasoline
Code : Gas

Form type name : ใบเบิกทางบัญชี
Code : 0088

3. Click on the icon on  the right side. ****The deleted data cannot be retrieved once removed.**

Form type list

Registered form type list
Register new form type from the button below

Register new type CSV upload CSV Sample Download CSV

Form type name : Travel expenses
Code : TE

Form type name : เบิกค่าเดินทาง
Code : Test-002

Form type name : Gasoline
Code : Gas

Form type name : ใบเบิกทางบัญชี
Code : 0088

Delete

4. A confirmation bar will appear at the bottom if you click 「Yes」 and the deletion will be completed.

Are you sure you want to delete it?

Are you sure to delete ใบเบิกทางบัญชี?

Yes No

7. Registering Projects (Project)

A project is a company's 「plan」. If you register a project, when submitting a request, you can choose a project linked to that request. You can also manage requests with projects.

7.1 Registering a Project

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Project」 from the list on the screen.

The screenshot shows the 'Basic Information Setting List' interface. On the left, a sidebar lists navigation options under 'Administrator function', with 'Basic information setting' highlighted. The main area contains a grid of settings:

User [31 items] Register users who can use the service. Users can be associated with groups or titles.	Route [36 items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [39 items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [11 items] Registering a form type allows you to manage your forms by classifying them.
Group [20 items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13 items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4 items] You can register a project. Registering will allow you to link your project to your application information.	Generic master settings [7 items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click on 「Register project」 at the top if there is no previous registration. After selecting one and completing it, the screen 「Register Project」 will appear as the third option.

The screenshot shows the 'Project list' interface. It features a title 'Project list' and a section for 'Registered project list' with the instruction 'Register new project from the button below'. Below this, there are four buttons: 'Register new project', 'CSV upload', 'CSV Sample', and 'Download CSV'. The 'Register new project' button is highlighted with a red box.

3. Enter the basic information of the project.

Register project

By registering project, you can manage request tied to each project
Go to list page from the button below to bulk register by CSV

[Show project list](#)

Project name
(required)

Project code

[Save](#)

Project name	Input project name
	Registration limitation: Not exceeding 255 characters.
Project code	Enter the desired ID code to register for that project.
	Registration limitation: Not exceeding 255 characters.
	Unable to register duplicate project codes.

4. If you click 「Save」 the project registration process will be completed.

Register project

By registering project, you can manage request tied to each project
Go to list page from the button below to bulk register by CSV

[Show project list](#)

Project name
(required)

Project code

[Save](#)

7.2 Editing a Project

You can change the name or code of a project that has already been registered.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Project」 from the list on the screen.

2. Click on the project you want to edit on the 「Project List」 screen.

Code	Project name
All	All
001	Test

3. Edit the title you want to modify, then click 「Update」

Register project

By registering project, you can manage request tied to each project
Go to list page from the button below to bulk register by CSV

Show project list

Project name (required)

Project code

Update

7.3 Deleting a Project

You can delete a registered project.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Project」 from the list on the screen.

2. Use the mouse to point to the form you want to delete on the form list screen. 「Project list」

3. Click on the icon on  the right side. ****The deleted data cannot be retrieved once removed.**

4. A confirmation bar will appear at the bottom if you click 「Yes」 and the deletion will be completed.
 ✕ Even though you delete a project, the project name that appeared in past requests will not be deleted.

Are you sure you want to delete It? ✕

Are you sure to delete Test?

8. Registering General Master Data Settings (Generic master settings)

Masters with various roles, specifically for the company, can be registered. If you register diverse usable masters, you can configure them as fields in the form.

8.1 Generic master setting

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Generic master data list」 from the list on the screen.

Basic Information Setting List

User [131 items] Register users who can use the service. Users can be associated with groups or titles.	Route [36 items] Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.	Form [39 items] Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.	Form categories [11 items] Registering a form type allows you to manage your forms by classifying them.
Group [20 items] Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.	Post rank [13 items] Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.	Project [4 items] You can register a project. Registering will allow you to link your project to your application information.	Generic master settings [7 items] You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.

2. Click 「Generic master setting」 on the top.

Generic master data list

Registered generic master data list
Register new master data from the button below

[Register new master data](#)

Code ^	Generic master data name	Explanation
All	All	All

3. Input information data for generic master.

Edit generic master data
✕

Generic master data code
(required)

Input generic master data code to differentiate generic master data

Generic master data name
(required)

Input generic master data name

Explanation

100,000

Add generic master data explanation

Save
Cancel

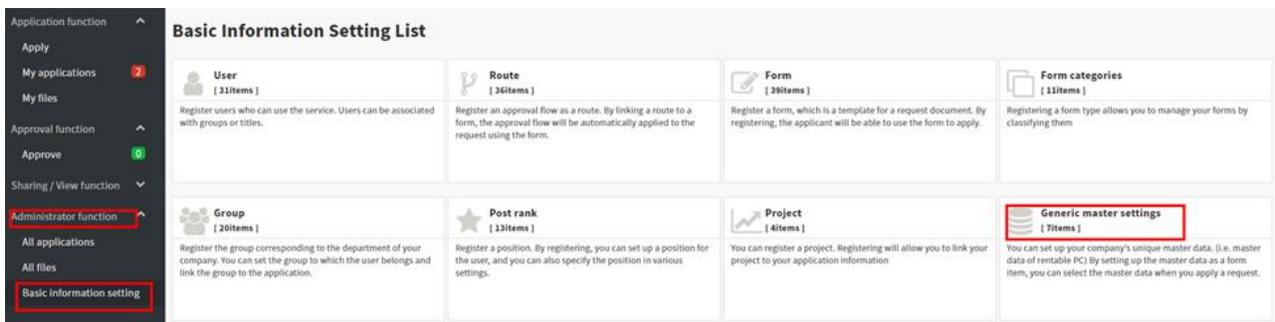
Generic master data code	Require	Input code to register the generic masters.
Generic master data name	Require	Input name to register the generic masters.
Explanation	Not mandatory	Input explanation to register the generic masters.

4.If you click 「Save」 the registration process will be completed. After registering generic master data, you can proceed to register records of the generic master data under section 8.4

8.2 Editing generic masters

Change the basic information of the registered generic masters data.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Generic master data list」 from the list on the screen.



2. Click on the generic masters data entry that you want to edit.

3. Edit the topic you want to modify and click 「Save」

Edit generic master data ✕

Generic master data code
(required)

Input generic master data code to differentiate generic master data

Generic master data name
(required)

Input generic master data name

Explanation

100,000

Add generic master data explanation

Save
Cancel

8.3 Deleting generic masters

You can delete generic master that has been registered.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Generic master data list」 from the list on the screen.

Application function

Apply

My applications 2

My files

Approval function

Approve 0

Sharing / View function

Administrator function

All applications

All files

Basic information setting

Basic Information Setting List

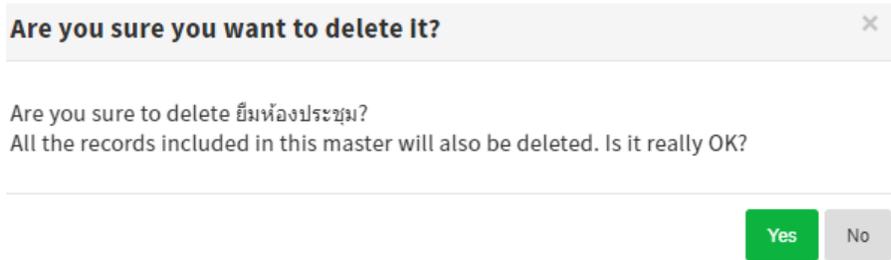
<p>User [31 items]</p> <p style="font-size: 0.8em; color: #666;">Register users who can use the service. Users can be associated with groups or titles.</p>	<p>Route [36 items]</p> <p style="font-size: 0.8em; color: #666;">Register an approval flow as a route. By linking a route to a form, the approval flow will be automatically applied to the request using the form.</p>	<p>Form [29 items]</p> <p style="font-size: 0.8em; color: #666;">Register a form, which is a template for a request document. By registering, the applicant will be able to use the form to apply.</p>	<p>Form categories [11 items]</p> <p style="font-size: 0.8em; color: #666;">Registering a form type allows you to manage your forms by classifying them.</p>
<p>Group [20 items]</p> <p style="font-size: 0.8em; color: #666;">Register the group corresponding to the department of your company. You can set the group to which the user belongs and link the group to the application.</p>	<p>Post rank [13 items]</p> <p style="font-size: 0.8em; color: #666;">Register a position. By registering, you can set up a position for the user, and you can also specify the position in various settings.</p>	<p>Project [4 items]</p> <p style="font-size: 0.8em; color: #666;">You can register a project. Registering will allow you to link your project to your application information.</p>	<p style="border: 2px solid red; background-color: #f8d7da; padding: 2px;">Generic master settings [7 items]</p> <p style="font-size: 0.8em; color: #666;">You can set up your company's unique master data. (i.e. master data of rentable PC) By setting up the master data as a form item, you can select the master data when you apply a request.</p>

2. Hover the mouse pointer over generic masters that you want to delete on the screen. 「Generic master data list」

3. Click on the icon on the right side. ****The deleted data cannot be retrieved once removed.**

All	All	All		✕
002	ชื่อห้องประชุม		Record	Delete

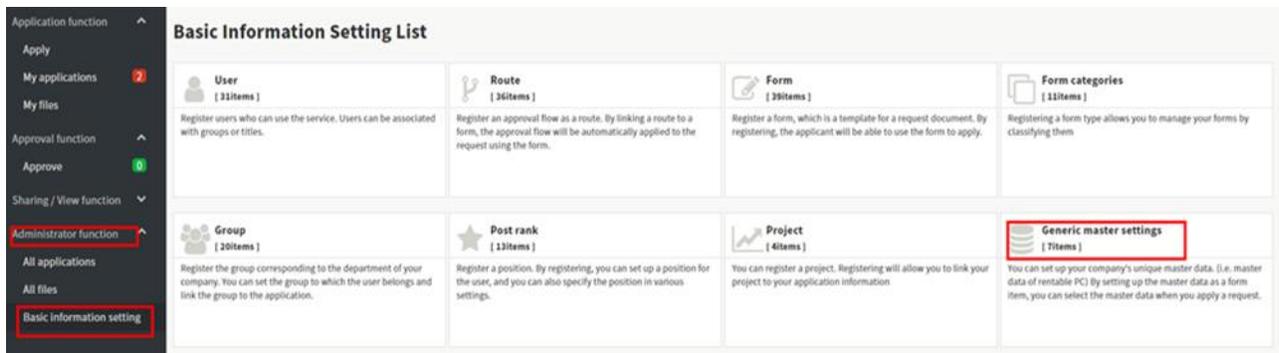
4. A confirmation bar will appear at the bottom if you click 「Yes」 and the deletion will be completed.



8.4 Registering records generic masters

Generic masters, which are exclusive to the company, can be registered as records. After registering records for these generic masters, the configured options of these masters can be displayed as choices in the form headings.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Generic master data list」 from the list on the screen.



2. Select the master you want to register a record for in the [Generic master data list] screen, then click the 「Save」 button on the right side of the master you want to register a record for.

Code ^	Generic master data name	Explanation
All	All	All
002	ยืมห้องประชุม	100,000

3. In case you want to edit the title of a record, please click on the 「Edit Record Item」 at the top.

Register new record from the button below

Register new record **Edit record items** back to generic master data list CSV upload CSV Sample Download CSV

Code	Room	จำนวน	Explanation	Remarks
All	All	All	All	All
00	Americano	4	White Board , Monitor, LED	
01	Black Coffee	6	White Board	
03	Capuccino	10	White Board , Monitor	

4. You can set the title or add a record title in the 「Edit Record Item」 screen. If you click on 「Add an item」 you will be able to add up to 5 record titles.

Edit record items ×

Adding, editing, and deleting record items

Room +

จำนวน + -

Save
Cancel

In case you've added a title and you desired to edit the record title, you can do so by entering the new title in the designated field.

Edit record items ×

Adding, editing, and deleting record items

Room +

จำนวน + -

Save
Cancel

After completing the settings, click the 「Save」 button.

Edit record items
×

Adding, editing, and deleting record items

+

+
-

Save
Cancel

5. Click on 「Register New Record」 at the top.

Register new record from the button below

Register new record
Edit record items
back to generic master data list.
CSV upload
CSV Sample
Download CSV

Code	Room	คอกกาแฟ	Explanation	Remarks
All	All	All	All	All
00	Americano	4	White Board , Monitor, LED	
01	Black Coffee	6	White Board	
03	Capuccino	10	White Board , Monitor	
04	Latte	4	whiteboard	

6. Input the basic information of the record.

Code	Require	Enter a code for categorizing the record to be registered.
Name of the record	Require	Enter the name of the record to be registered.
Title of the record	Not mandatory	Enter the title of the record to be registered.
Content	Not mandatory	Enter the content of the record to be registered.
Remarks	Not mandatory	Enter the note for the record to be registered.

※ For [Record Name]and [Topic Name] the names you have set will be displayed.

7. After entering the required information, click [Save] to complete the registration process.

Edit record items
×

Adding, editing, and deleting record items

+

+
-

Save
Cancel

8.5 Editing records of generic masters

You can modify the basic information of a registered master record.

1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Generic master data list」 from the list on the screen.

2. Select the master record you want to edit the record for on the [Generic master data list] page, then click on the [Save] button displayed on the right side of the master record you're editing the record for.

Code ^	Generic master data name	Explanation	
All	All	All	
002	ชื่อห้องประชุม		Record

3 .Click on the record you want to edit on the record list screen of the registered records.

Code	Room	ความจุ	Explanation	Remarks
All	All	All	All	All
00	Americano	4	White Board , Monitor, LED	
01	Black Coffee	6	White Board	
03	Capuccino	10	White Board , Monitor	
04	Latte	4	whiteboard	

4. Edit the title you want to change and click 「Save」

Record edit ×

Code (required)
Input code for differentiating record

Room (required)
Please input Room.

ความจุ
Please input ความจุ.

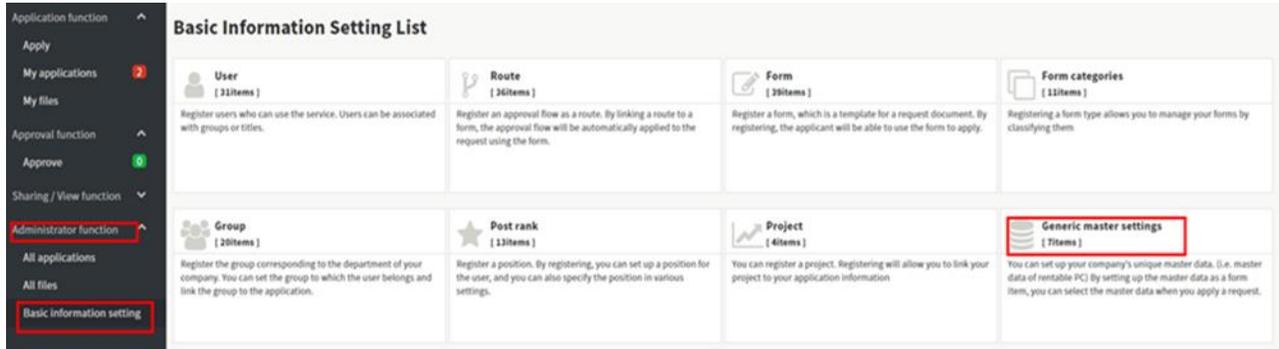
Content
Input record detail

Remarks
Input remarks

8.6 Deleting records of generic masters

You can delete a registered record of a master.

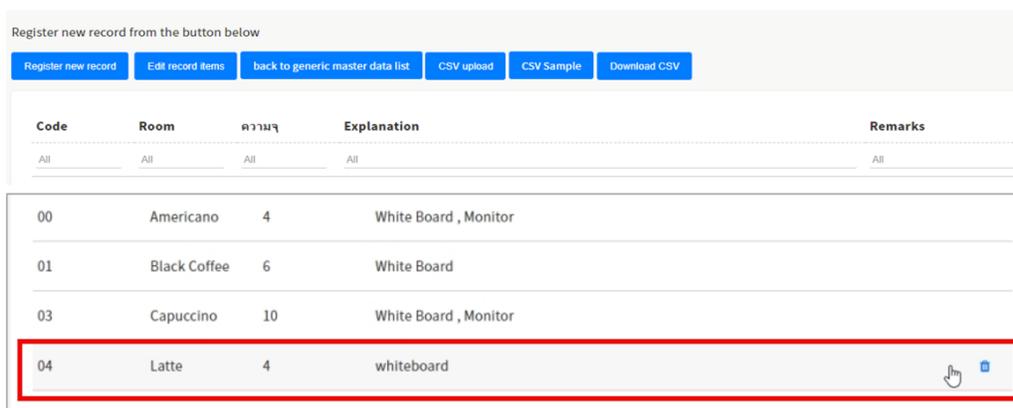
1. Select 「Basic Information Setting」 in 「Administrator Function」 on the left side and select 「Generic master data list」 from the list on the screen.



2. Select the master data you want to delete a record for on the [Generic master data list] page, Click on the [record] shown on the right side of the master data you want to delete a record for.

Code ^	Generic master data name	Explanation	
All	All	All	
002	ขึ้นห้องประชุม		Record

3. Hover your mouse pointer over the record you want to delete on the registered record list page.



4. Click on the icon  on the right side.

Code	Room	จำนวน	Explanation	Remarks
All	All	All	All	All
00	Americano	4	White Board , Monitor, LED	
01	Black Coffee	6	White Board	
03	Capuccino	10	White Board , Monitor	
04	Latte	4	whiteboard	

5. A confirmation bar will appear at the bottom if you click 「Yes」 and the deletion will be completed.

Are you sure you want to delete It? ×

Are you sure to delete Americano?