rakumo Workflow

Administrator's Manual

2023/04/13

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1. About This Manual

This manual is intended for "Google Workspace special administrators" , "rakumo Admin"and "rakumo workflow managers" and provides information on how to configure the administrative settings for the **rakumo Workflow**.

Before configuring the administrative settings for the rakumo Workflow, configure the general settings for the rakumo Admin Console. For how to configure the general settings, see the "Administrator's Manual [rakumo General]."

2. Access the Workflow Admin Console

This chapter provides information on the following:

- **Registering users that can access the workflow Admin Console**
- **Access the Workflow Admin Console**

2.1. Register users that can access the Workflow Admin Console (workflow Admin)

First, access the rakumo Admin Console.

https://a-rakumo.appspot.com/admin

On the **rakumo Admin Console** at the above URL, register users that can access the Workflow Admin Console (Workflow Admin). **Only Google Workspace's special administrators** or **rakumo administrators** can log in to the rakumo Admin Console.

The settings are shared across the domain and you are redirected to the rakumo Admin Console which is specific to the domain no matter which administrator in the domain you log in as.

From [Home], go to [Manage Roles] > [Workflow Admin].

▼
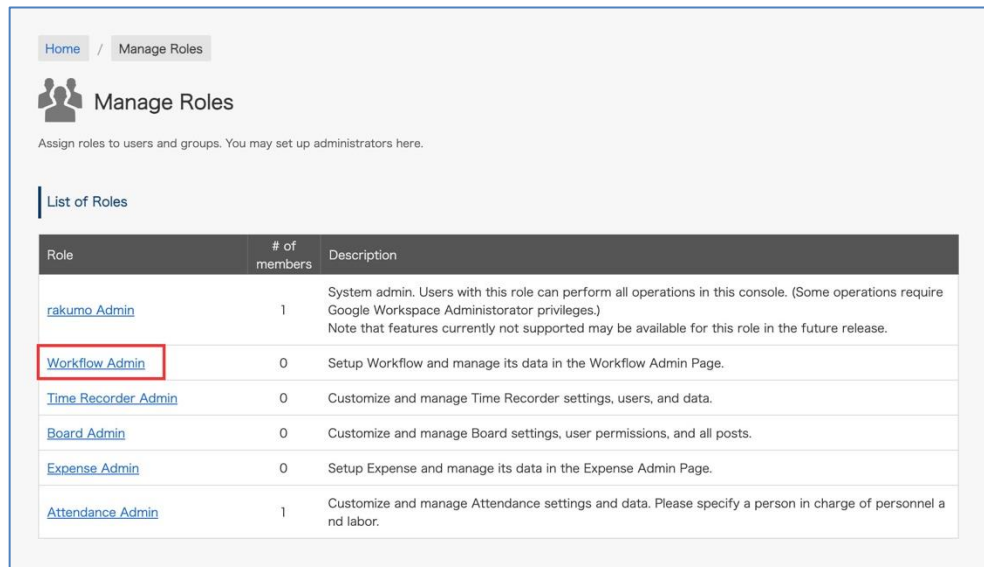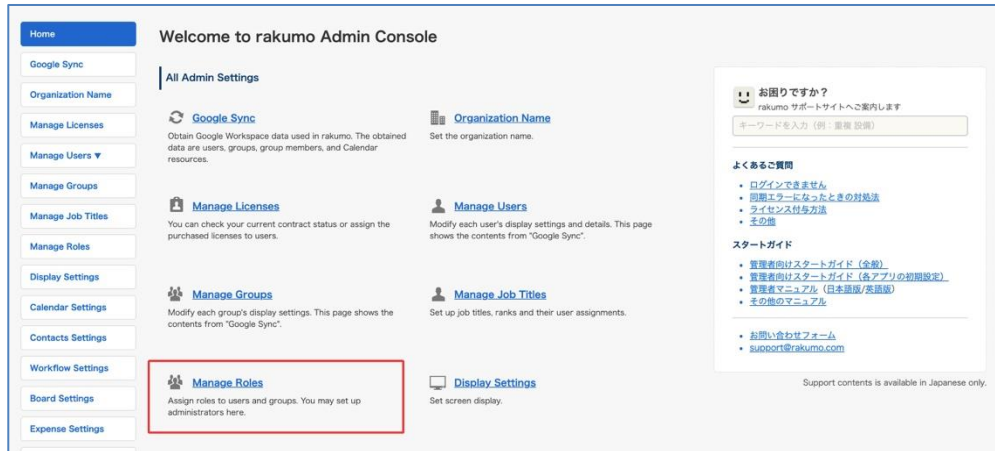
On this page, register users that can access the Workflow Admin Console (Workflow Admin). The Workflow managers registered on this page can access the Workflow Admin Console and manage the Workflow settings (such as application route and application form settings).

Add Members

Enter the e-mail address of the user or group in CSV format (comma, with a line break), and click "**Add**".

* Google Workspace special administrators also need to be registered on this page to be Workflow managers.
* In addition to the above settings, a workflow license must be assigned to the user accessing the Workflow Admin Console. For how to assign licenses, refer to the chapter "8.3. Assigning licenses" in "rakumo Common Administrator Manual".

2.2. Access the Workflow Admin Console

To access the Workflow Admin Console, click **Workflow Admin Console.**
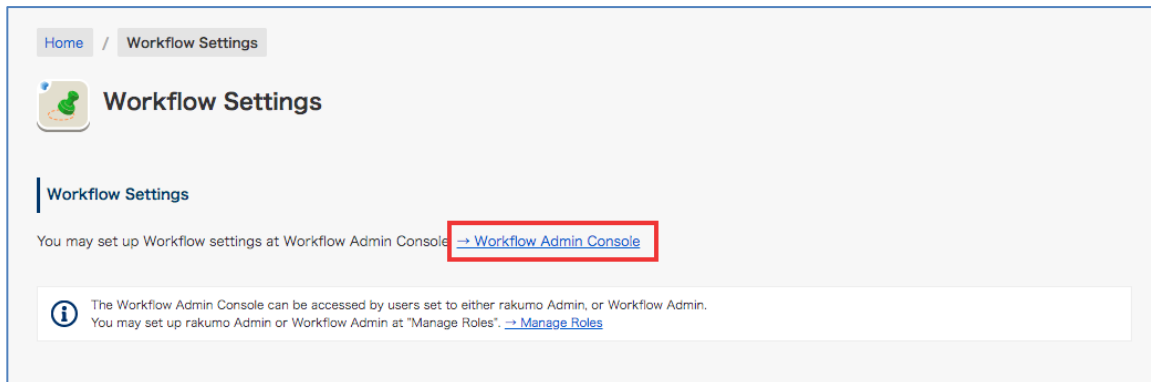
Or,

you can directly access the Workflow Admin Console at the following URL:

https://a-rakumo.appspot.com/workflow/admin

In addition, you can access it by clicking [User name] > Workflow Admin Console at the top right of the workflow user screen.
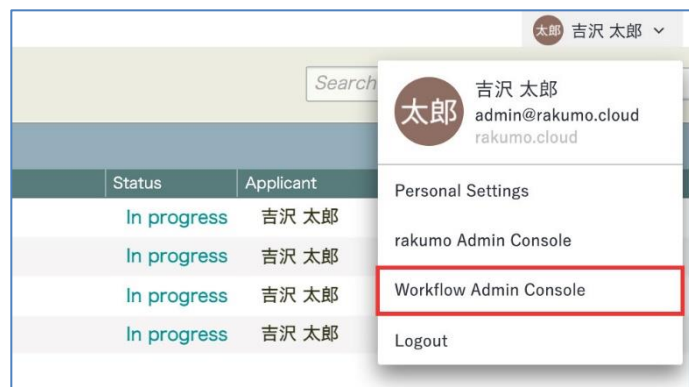
* It will not be displayed except for users who have set the role of "rakumo administrator" or "workflow administrator" and "Operators" who are in charge of operations in the application category.

3. Overview of the Workflow Admin Console
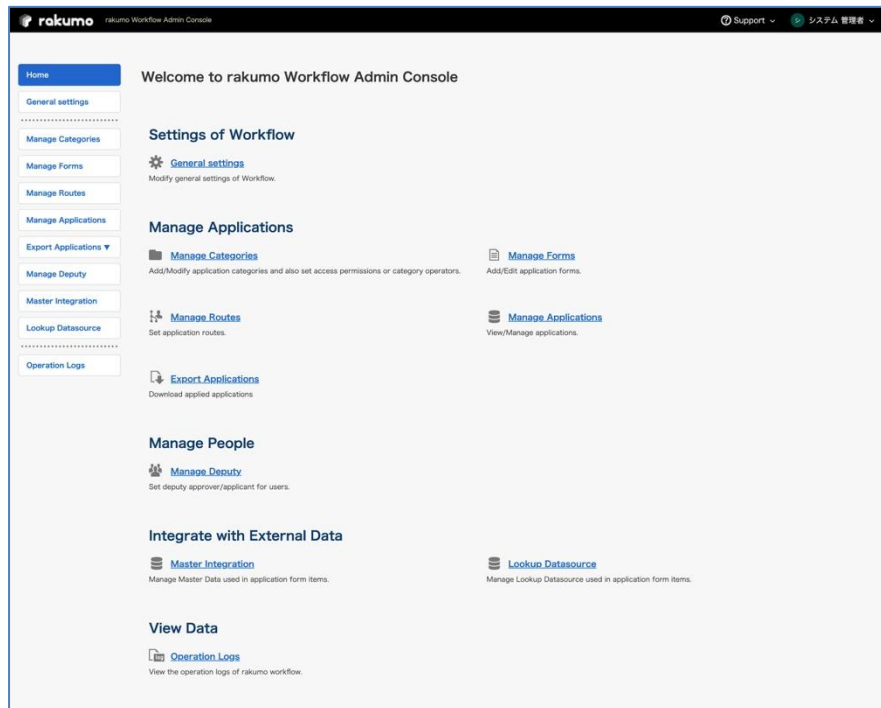
[Settings configured on the Workflow Admin Console]

- Modify general settings of Workflow.

- Create, edit, and delete the application categories
- Change the order of application categories displayed
- Set users that can access application categories
- Assign operators to application categories
- Export the category structure table

- Create, edit, and delete application forms
- Activate application forms
- Import and export application forms

- Get the application screen URL
- Copy application forms
- Change the category of application forms
- Integrate with application routes(Shared route)
- Create, edit, and delete the application routes(dedicated route)
- Set branches for application routes
- Enter/edit items in application forms

Manage Routes

- Create, edit, and delete the application routes（shared route）
- Confirmation of application form using application route (shared route)

Manage Applications

- Check, cancel, and delete the submitted application forms

Export Applications

- Download application form data in a CSV file

Manage Deputy

- Set proxy approvers
- Set proxy applicants

Master Integration

- Set master data

Lookup Datasource

- Manage Lookup Datasource used in application form items.

Operation Logs

- Check the operation logs on the Workflow Admin Console

4. Process of Setting an Application Form

The settings required to enable users to submit applications are as follows:

Step1 **Create an application category**.

The application category is a folder (eg, accounting department) for storing and managing each created application form (eg, equipment purchase application). You control who can use the application template with the folder.

→ Refer to **5. Manage Application Categories**.

Step2 **Create an application Form.**

An application form is an input form used when submitting a user application.

Create based on current approval and procedural documents.

→ Refer to **6. Manage Application Forms**.

Step3 **Create and set the application route.**

The application route is the route of the approval / confirm through which the application passes.

Based on the procedures of the current approval process, create a shared route to be used in the workflow and link it to the application form. If the route is different from the application form, you can set a dedicated route for the application form. After setting the route on the application form, you can perform additional settings such as branching the route according to the input items.

→ Refer to 7. Managing Application Routes.

→ Refer to 6.6. Branching Application Route.

Step4 **Accept the application using the application template.**

By setting the route to the application template and accepting the application, users will be able to submit an application using the application template on the user screen.

→ Refer to 6.10. Use / Disable of the created application template.

5. Manage Application Categories

5.1. Create a New Application Category

Create an application category. An application category is a folder to store application forms.

Workflow Admin Console > Home > Manage Categories

Click [**+Add Application Category**].
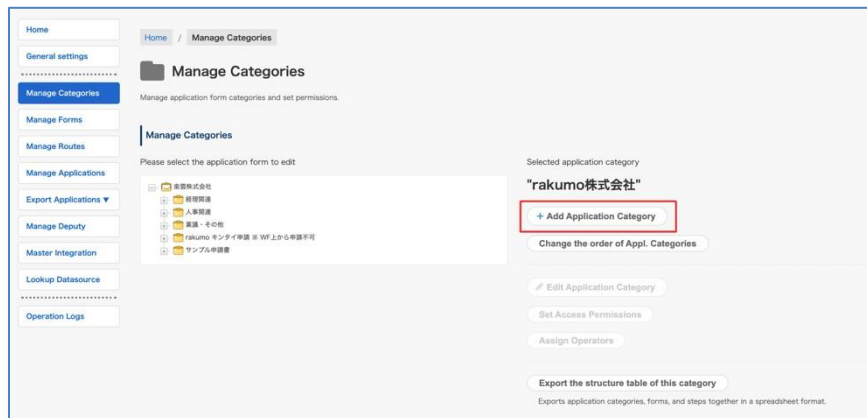
Add application category

[Application Category Name] * Required

    Enter a name for an application category (e.g. accounting application, General affairs application).

[Application Category Code] *** Required**

Enter an application category code. You can enter any character strings to distinguish the application category from other application categories (e.g. expense application - YYYY/MM/DD).

[Notes]

Enter notes for administrators.

Finally, click [**+Add Application Category**].

Check that a new application category has successfully been added.

5.2. Add Nested Application Category

You can add a nested application category under an application category you created.
Manage Categories > Select an application category > click [**+Add Application Category**]

Enter in the Required fields and click [**+Add Application Category**]

Check that a nested application category has successfully been added

5.3. Edit Application Category

You can edit the application categories you created.

Manage Categories > Select the application category > click [**Edit Application Category**]
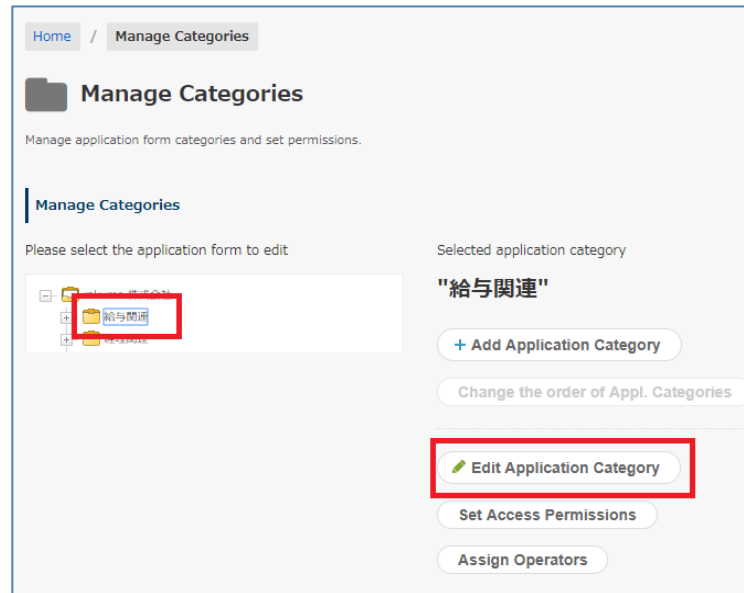
After editing the details of the application category on the Edit Application Category page, click [**Save Changes**]

5.4. Delete an Application Category

You can delete the application categories you created.

Manage Categories > Select the application category > click [**Edit Application Category**]
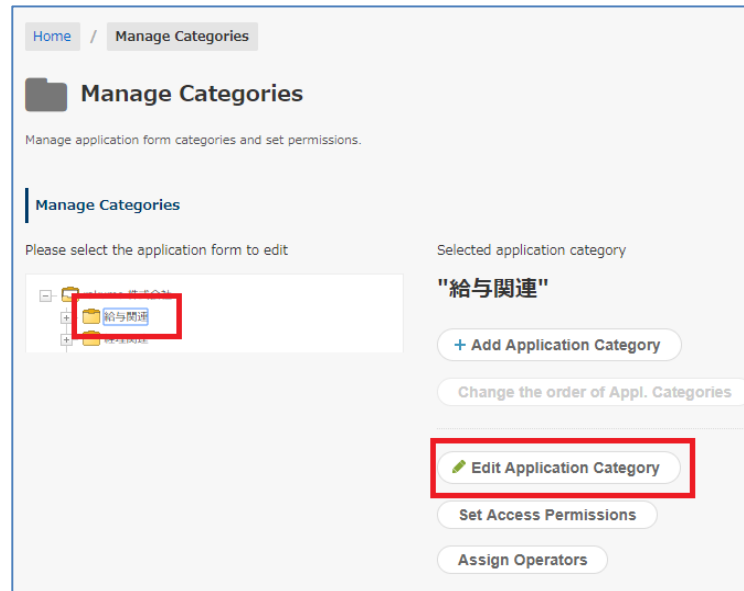
After editing the details of the application category on the Edit Application Category page, click [**Delete this application category**]
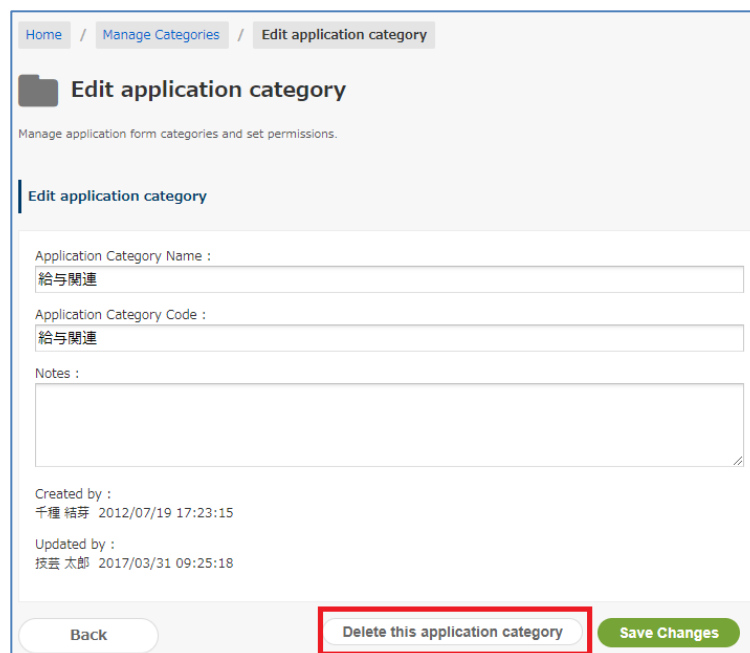
5.5. Register Users That Can/Cannot Access Application Categories

When registered as a user that can/cannot access an application category, the user cannot submit applications using an application form in the application category. There are no restrictions by default.

Example use: Only the users in the HR department can submit applications that fall under the application category "Human Resources." Users other than those specified above cannot apply

To set access permissions on an application category, select an application category and click [**Set Access Permissions**].
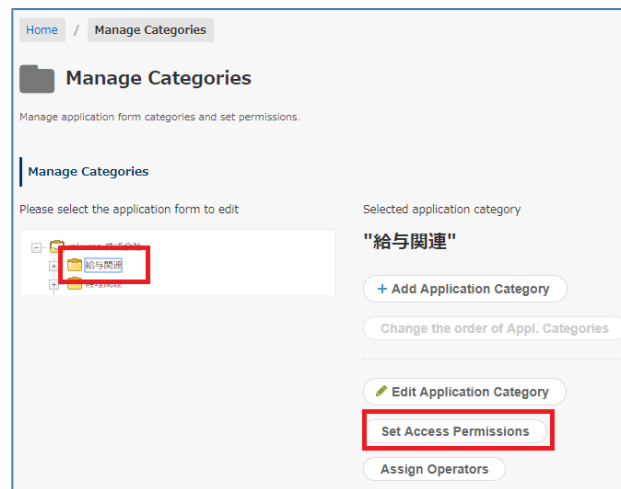
Set Access Permissions

You can select either [Specify users who CAN access the application category] or [Specify users who CAN NOT access the application category]. You can configure the settings on a user, organization, Job Title basis.
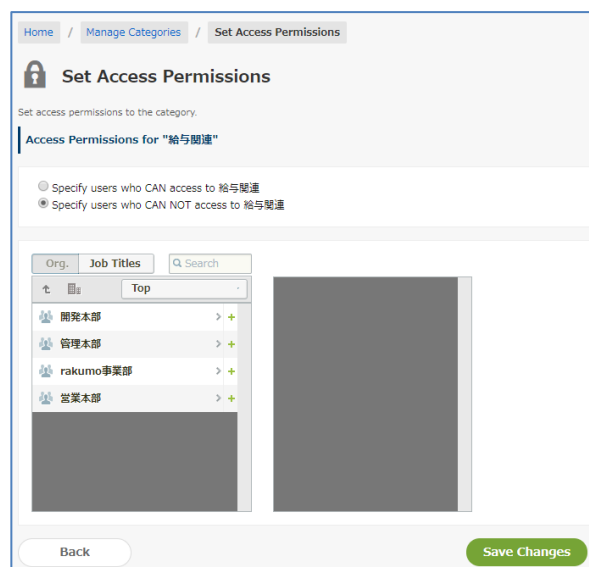
When you are finished selecting users, click [**Save Changes**].

<Points to Note When Setting access permissions on an application category>

When a group is specified, the scope of granting access rights is <u>for the immediate user and all users in the subordinate group.</u> (*)

Access rights are also granted to users who belong to child and grandchild groups.

（Example）

When the Sales Department group includes the Sales Manager and Sales Department Section 1 and Sales Department Section 2
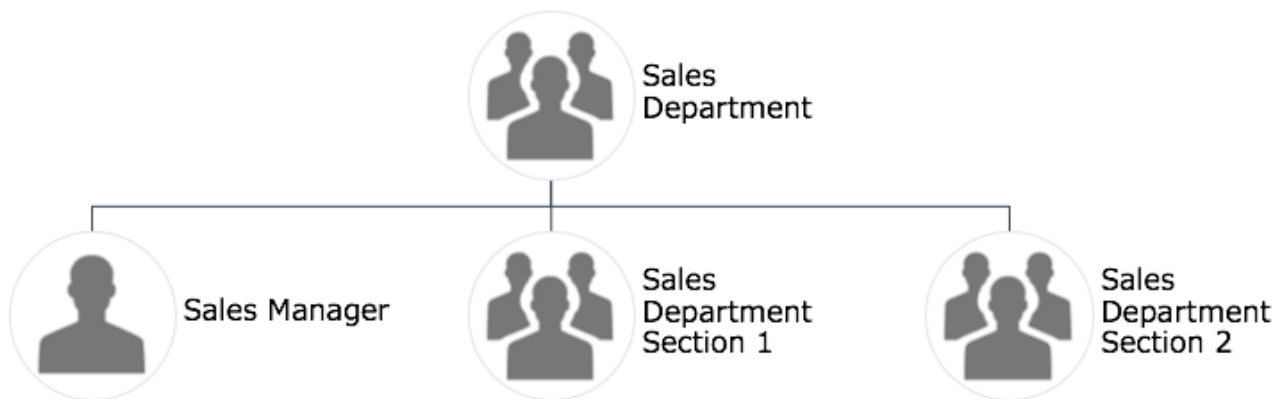
If you specify the sales department group and grant access rights, the access rights will be reflected in "Sales department manager user", "Users belonging to the Sales Department Section 1 group", "Users belonging to the Sales Department Section 2 group".

If you do not want to set access rights for users belonging to the Sales Division 1 group or Sales Division 2 group, please specify the sales manager user directly.

* For customers using rakumo before August 26, 2019,the old "assign only to users directly under the group" specification will continue until you activate the new specification above. Please be assured that your current operation will not be affected unless you explicitly change the setting.

If you wish to enable the above new specifications, please make the following settings.

rakumo Workflow Admin Console > General Settings > Check the "Enable" check box for the Category Access Permissions and Operators, and click "Save Settings" at the bottom of the screen.

5.6. Setting Up the Operators for an Application Category

In addition to the Workflow Admins registered at **2.1 Register Users Who Can Access the Workflow Admin Console (Workflow Admin)**, you can assign users with administrative privileges (operators) only to the application categories specified.

Click [**Assign Operators**] and move on to the Set Operators page.
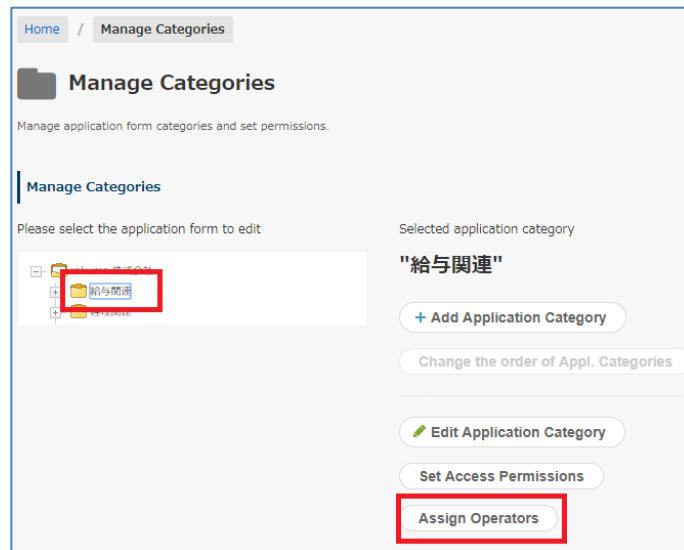
The users registered as operators for the application category are operators only in this application category. They can create forms and nested categories within the category. You can also set organizations, posts, and charges as operators in addition to users.
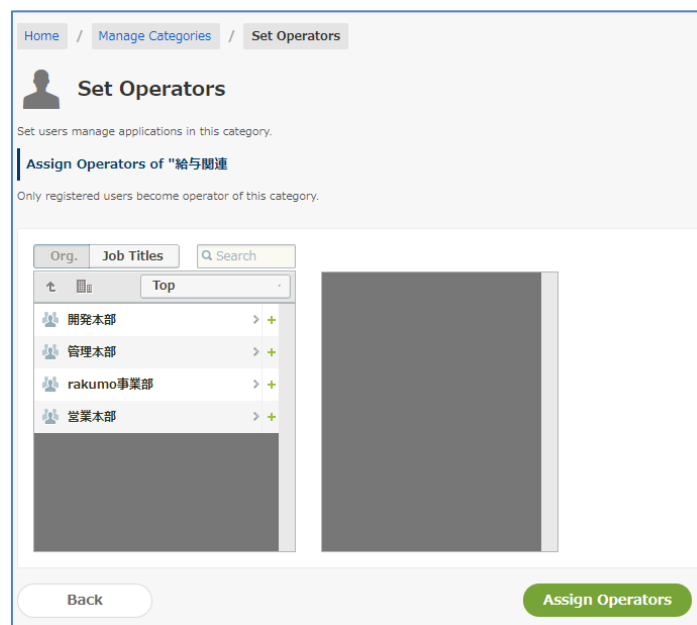
After selecting operators, click [**Assign Operators**].

When an operator for the application category logs in to the Workflow Admin Console, the following screen is displayed.
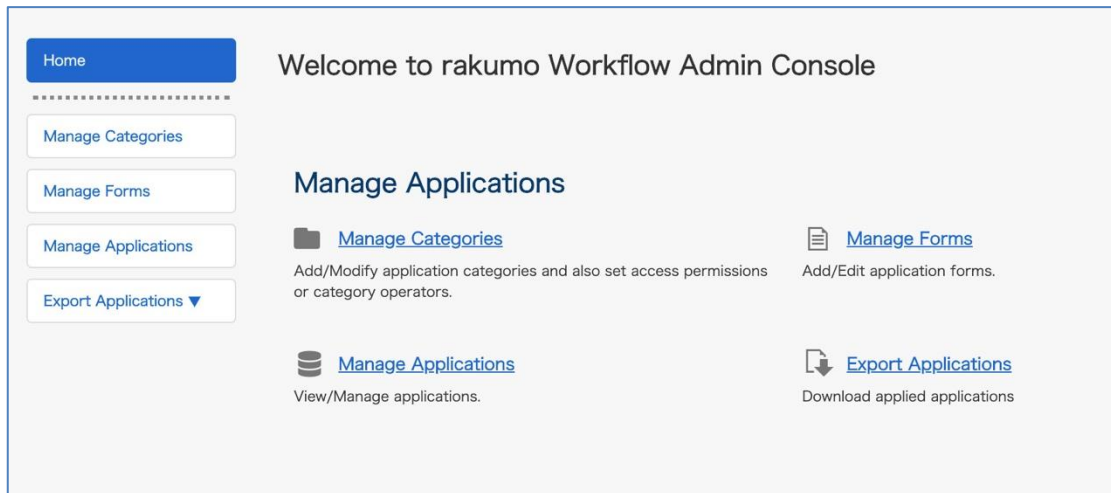
Operations staff can do:

- ・　Add, edit, and delete application categories under the application category
- ・　Add, edit, and delete application templates under the application category
- ・　Creation, editing, and deletion of dedicated routes under the application category
- ・　Changing the shared route linked to the application template under the application category
- ・　Assigning access rights for application categories
- ・　Add, delete operation personnel for application category
- ・　Manage applications under the application category, and download applications data
- ・　Export the category structure table

etc...

<Points to Note When setting the Operators>

If a group is specified, the scope of granting operator authority is <u>for the immediate users and all users in subordinate groups. </u>(*)

Operator rights are also granted to users who belong to child and grandchild groups.

（Example）

When the Sales Department group includes the Sales Manager and Sales Department Section 1 and Sales Department Section 2
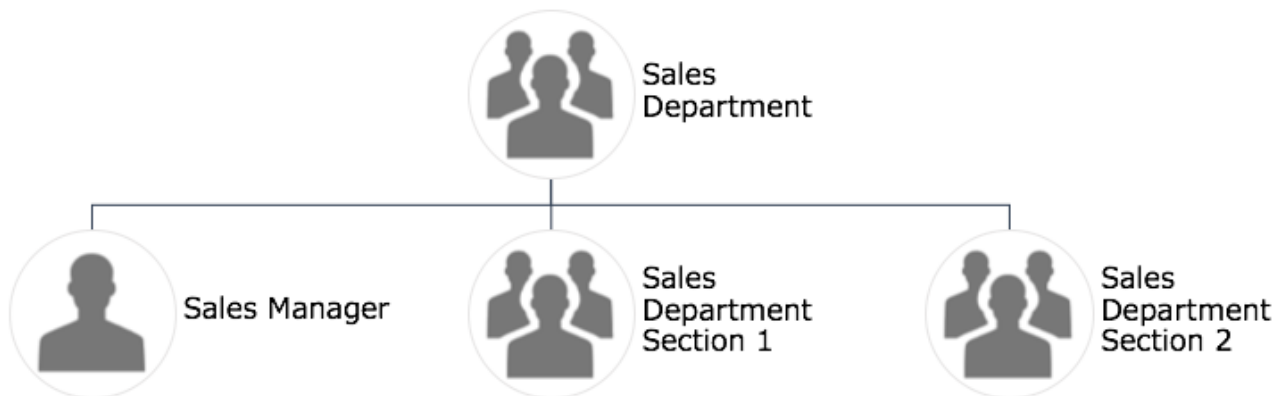
If you specify a sales department group and grant operator authority, the operator authority will be reflected in "Sales department manager user", "Users belonging to sales department section 1 group", "Users belonging to sales department section 2 group".

If you do not want to assign users belonging to the sales department section 1 group or sales department section 1 group of the child group to the operator, specify the sales manager user directly.

* For customers using rakumo before August 26, 2019,the old "assign only to users directly under the group" specification will continue until you activate the new specification above. Please be assured that your current operation will not be affected unless you explicitly change the setting.

If you wish to enable the above new specifications, please make the following settings.

rakumo Workflow Admin Console > General Settings > Check the "Enable" check box for the Category Access Permissions and Operators, and click "Save Settings" at the bottom of the screen.

5.7. Export the list of route steps associated with the template under the Application Category

You can output the composition table of the application category and list the existing application template and the route step information set in the application template.

5.7.1. Outline of the structure table

● What is the "structure table"

The "Application Categories", "Application Templates", and "Application Route Steps" information for a particular application category is linked and combined into a single table.

The structure table is output in Google Spreadsheet format.

Export example:

| Category	Appl. Form				Appl. Route						
Level 1	Appl. Form Name	Appl. Form Code	Appl. Form Status	Description	Route Name	Route Code	No		Step Name	Type	Approver
経理関連	IT製品購入申請	copy_sample04	Open	新しくハードウ	承認3→作業1→	20211105042356	1	課長承認	Approval (everyone)	課長
							2	部長承認	Approval (everyone)	部長
							3	社長承認	Approval (everyone)	代表取締役社長
							4	関連作業実施	Operation	[No members assigned]
							5	結果回覧	Circulation	[No members assigned]
経理関連	備品／消耗品購入申	copy_sample03	Open	備品・消耗品を	承認3→作業1→	20211105042356	1	課長承認	Approval (everyone)	課長
							2	部長承認	Approval (everyone)	部長
							3	社長承認	Approval (everyone)	代表取締役社長
							4	関連作業実施	Operation	[No members assigned]
							5	結果回覧	Circulation	[No members assigned]
経理関連	定期券購入申請	copy_sample02	Open	定期券の購入を	承認3→作業1→	20211105042356	1	課長承認	Approval (everyone)	課長
							2	部長承認	Approval (everyone)	部長
							3	社長承認	Approval (everyone)	代表取締役社長
							4	関連作業実施	Operation	[No members assigned]
							5	結果回覧	Circulation	[No members assigned]
経理関連	交通費申請	copy_sample15	Open	交通費を精算す	承認3→作業1→	20211105042356	1	課長承認	Approval (everyone)	課長
							2	部長承認	Approval (everyone)	部長
							3	社長承認	Approval (everyone)	代表取締役社長
							4	関連作業実施	Operation	[No members assigned]
							5	結果回覧	Circulation	[No members assigned]
経理関連	国内出張申請	copy_sample01	Open	国内出張に行く	承認3→作業1→	20211105042356	1	課長承認	Approval (everyone)	課長
							2	部長承認	Approval (everyone)	部長

● Please use it in such a scene
・ When you want to understand the whole workflow when the application category is deep or when many application templates are in operation.
・ When you want to identify the part that needs to be changed in the workflow application route when there is a personnel change or organizational change.
・ When it is necessary to explain the operational status of the workflow in a periodic audit, etc., and you want a document that outputs the current configuration together.

● A user who can export the structure table
・ Users with "workflow administrator" privileges
・ Users who are assigned the "operator in charge of application category" authority (*)
   (*)Only the application category with the authority of the operator and the application category under it can be export.

5.7.2. How to export the structure table of application category

● **Advance preparation**

Create a folder on Google Drive before export. It is used to save the export structure table.

Please refer to the following Google Workspace Learning Center page for how to create a folder.

https://support.google.com/a/users/answer/9310154?hl=en#2.1

● **Export procedure**

1. Open the rakumo Workflow Admin Console > Manage Categories.

    https://a-rakumo.appspot.com/workflow/admin/category/

2. Select the application category for which you want to export the structure table.
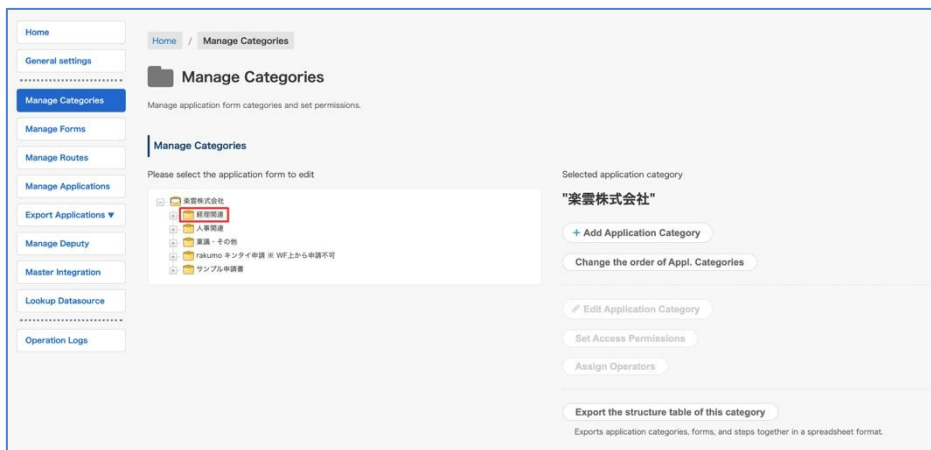
Example: If you want to export the structure table of all application categories, select the application category at the top. If you want to export the structure table under a specific application category, select the application category.

3. Click the 「Export the structure table of this category」.
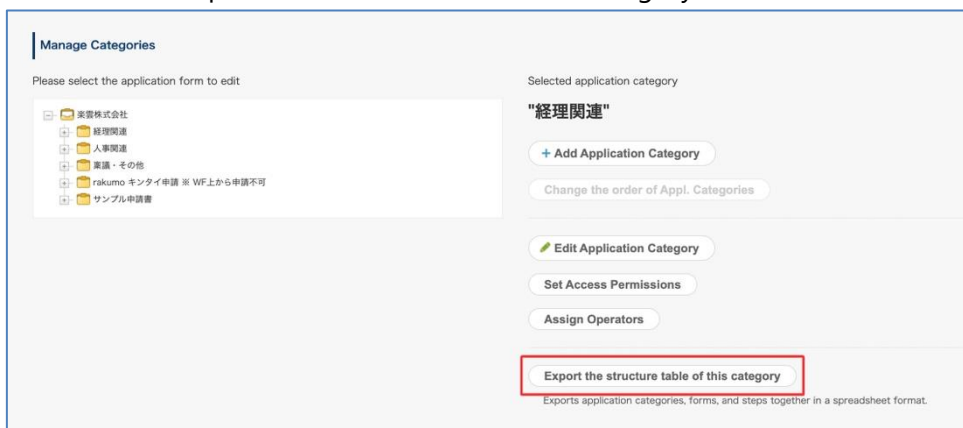
4. After confirming the Selected application category (*), click "Export".
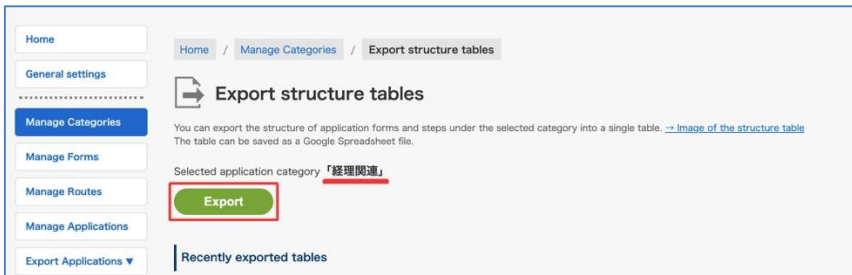
* If you specify the application category at the top, the selected application category will be displayed as "Root".

5. (Only when using Google Drive for the first time on rakumo) A pop-up will appear asking for login verification and access request for your Google account.
   After logging in, click "Allow" on the access request.
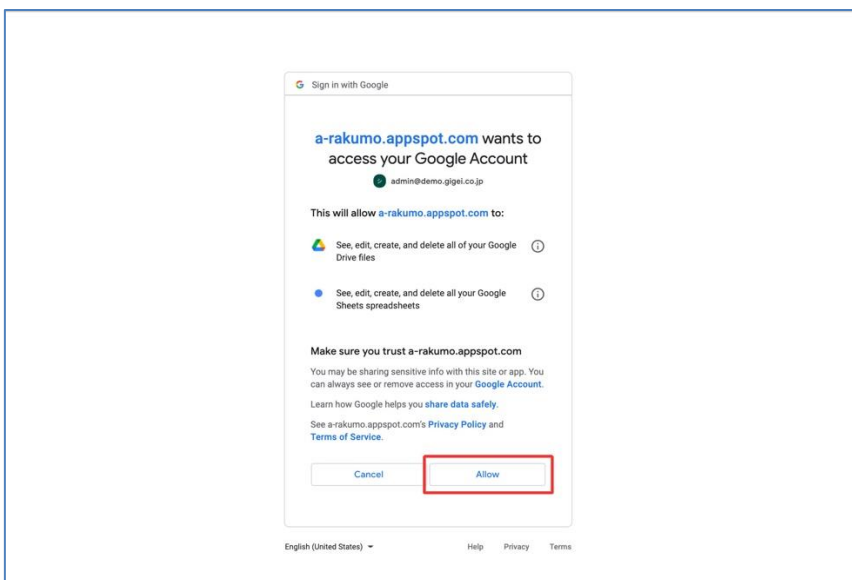
6. Select the save destination (folder on Google Drive) and click "Select".
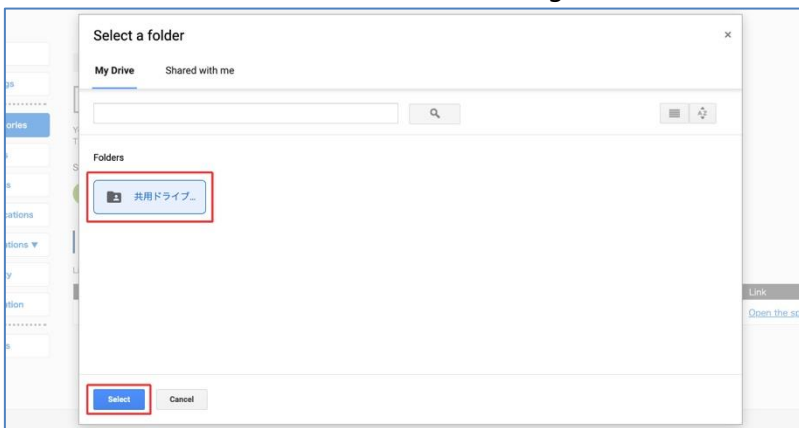
7. Export will start. After a while, click "→ Reload".
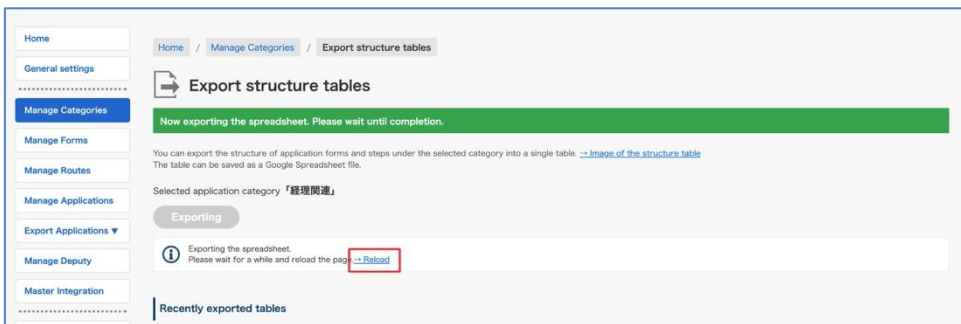
8. When the export is completed, the export result will be displayed in the "Recently exported tables" column.
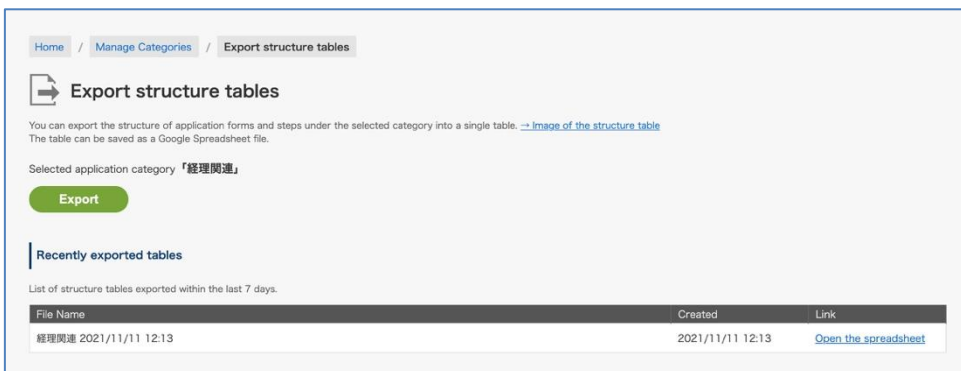
9. Click "Open the spreadsheet" to see the structure table.
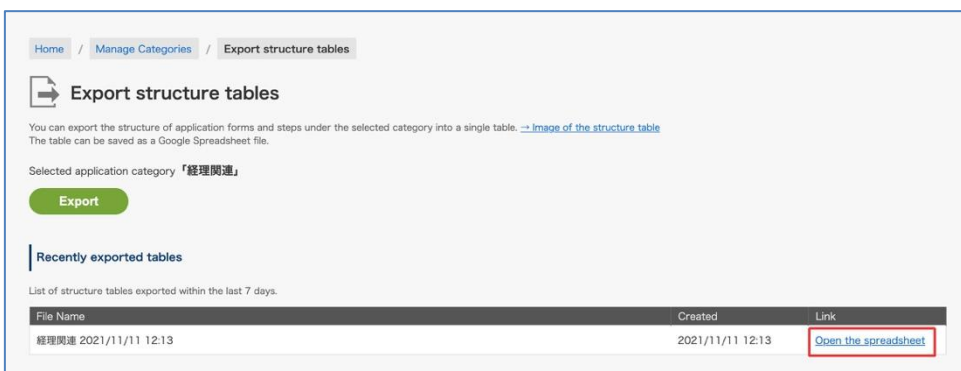
● **Reference information**

・ The time required for Export depends on the number of application templates under the selected application category. If you select the top section (root), it may take about 5 to 10 minutes. If you are in a hurry, please consider specifying an application category other than the root and Exporting it in multiple times.

- The structure table does not contain information about the following : the type of application route (shared route / dedicated route), application form input items, application route branching, and item input / edit settings.

- The export range of the structure table cannot be limited to "only the application template directly under the selected application category". The information of the application form template belonging to all the application categories under the application category selected at the time of export is export.

- The export range of the structure table cannot be narrowed down according to the valid / invalid status of the application template. Information on the application form template for all states is export.

- If a route is not set for the application template to be export, the application route field will be export blank.

- In "Recently exported tables", only the structure table that you output within the last 7 days is displayed. The Export history that has passed the number of days will not be displayed, but the export file will remain on Google Drive.

- This function is a function to export a list of the current settings, and there is no import function. Please note that editing the export structure table data does not affect the workflow settings and does not change them.

6. Manage Application Forms

You can create new application forms and edit, import, export, and delete application form templates

6.1. Set a Format for Common Application Numbers

You can set a format for application numbers printed in applications using common application numbers or on an application form basis.
Here you set a format for common application numbers.

*For how to set a format for application numbers on an application format basis, see section "**6.3.1 Setting up [Use application number for each forms]**".

Go to General Settings.

[Format for Common Application Numbers]

You can set a format for serial application numbers that are common to application forms. When no application number format is specified, a serial number is automatically assigned to the application form.

%SN%: Assign application numbers in ascending order from 1.

%00000/SN%: Sequence numbers (fills with 0's up to the digit for 0)

%YYYY%: 4-digit year. **The year you set is displayed** (for how to set a year, see **6.2 Set the**
Corresponding Year for an Application Number)

%YY%: last two digits of the year

%MM%: 2-digit month

%DD%: 2-digit day

For instance, when the application number is "%YYYY%-%MM%-%DD%:%000/SN%," the application numbers are issued in the following manner: 2014-05-16:001; 2014-05-16:002; 2014-05-16:003...

* To complete the settings, click [**Save Changes**] at the bottom of the page.

[Initial Value for Common Application Numbers]

When using sequence numbers (%SN% or %00000/SN%) for a format for common application form numbers (or when no format is specified for application numbers), you can set an initial value for sequence application numbers.

Enter a number for an initial value and select **Apply this initial value immediately**

When you click [**Save Changes**] at the bottom of the page, the start value of the specified application number will be applied.

After this operation, the serial number part of the application number of the newly created application will be numbered from an "Initial Value".

The serial number part of the application number of the application submitted before this operation will not be affected by this operation and will be retained.

6.2. Set the Corresponding Year for an Application Number

When setting the year in an application number format used for applications, the year is in a fiscal year format and you can set a fiscal year start date.

* When not specified, January 1 is considered as the start date of the fiscal year.

Go to General Settings.

Start with the **Fiscal Year start date.**

Reset common Appl. number

By selecting **[Reset annually]** , you can configure the settings so that the application number is automatically reset every fiscal year start date.

The serial number part of the application number of the application form newly created after the reset will be numbered from an "Initial Value". Application numbers for applications that have already been submitted will not be affected by the reset and will remain on hold.

Click [**Save Changes**] at the bottom of the page at the end when you are finished with settings.

6.3. Create an Application Form

Manage Forms > Select the application category > click [**Add application form**]
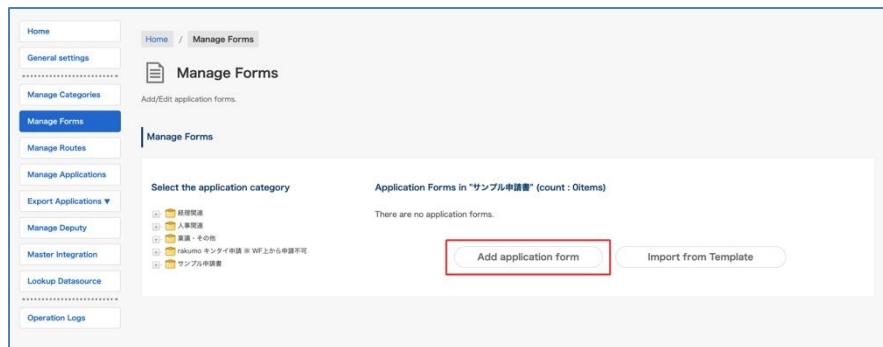
Move to the **Add Application Form** page

[Application Form Name] *Required

Enter a name for the form.

The information you enter will be subject to keyword searches when selecting an application form.

[Code] *Required

Enter the code. You can enter any character strings to distinguish the application form from other application forms.

[Description]

Enter a description of the application form. The description entered is displayed on the Application form page.

The description entered will appear on the application form and will also be subject to keyword searches when selecting an application form. For this reason, it is recommended that the description be enhanced to make it easier for users to reach the desired application when they search for it.

It supports the input of line break and the display of links to input URLs.

[Notes for Administrators]

Enter notes for administrators.

[Appl. Number Type]

You can select an application number format from the pulldown menu.

[**Use common application number**]

-> Assigns a serial application number that is common for application forms.

[**Use application number for each forms**]

-> Assigns an application number that is specific to the application form. By selecting this, you can set up [Use an application number for each forms]. (*See next page)

[**Not use application number**]

-> No application number is assigned to the application form.

6.3.1 Setting up "Use application number for each forms"

[Appl. Number Format]

When you select **[Use application number for each forms]** at **[Appl. Number Type]**, you can set an application number format. When no application number format is specified, a serial number is automatically assigned to the application form.

%SN%: Assign application numbers in ascending order from 1.

%00000/SN%: Sequence numbers (fills with 0's up to the digit for 0)

%YYYY%: 4-digit year. **The year you set is displayed** (for how to set a year, see **7.2 Set the Corresponding Year for an Application Number**)

%YY%: last two digits of the year

%MM%: 2-digit month

%DD%: 2-digit day

For instance, when the application number is "%YYYY%-%MM%-%DD%:%000/SN%," the application

numbers are issued in the following manner: 2014-05-16:001; 2014-05-16:002; 2014-05-16:003...

[Initial Value]

When using sequence numbers (%SN% or %00000/SN%) for a format for application form numbers (or when no format is specified for application numbers), you can set an initial value for sequence application numbers.

[**Apply this initial value immediately**]

When you click [**Save Changes**] at the bottom of the page, the start value of the specified application number will be applied.

After this operation, the serial number part of the application number of the newly created application will be numbered from an "Initial Value".

The serial number part of the application number of the application submitted before this operation will not be affected by this operation and will be retained.

[**Reset the application number of this form annually**]

Selecting this resets the application number automatically every fiscal year start date.
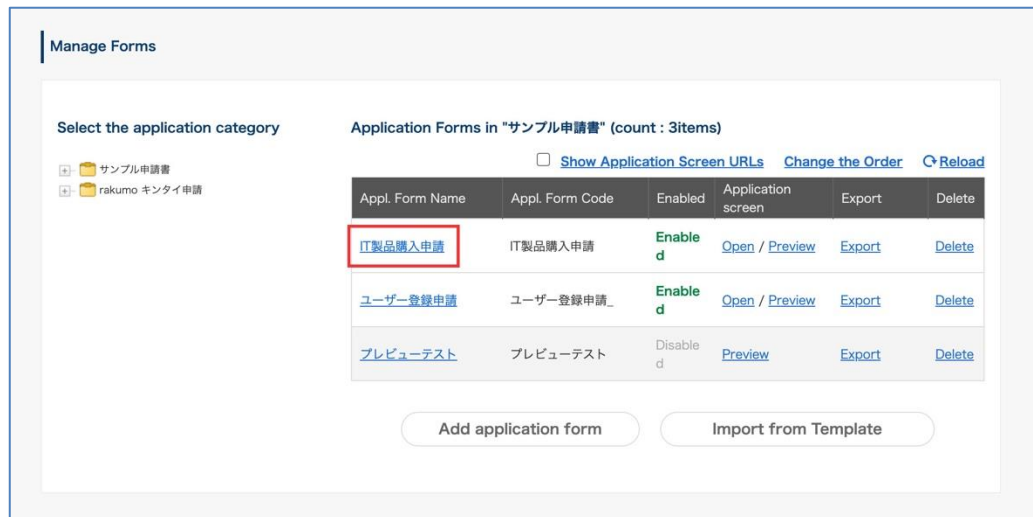
The serial number part of the application number of the application form newly created after the reset will be numbered from the "Initial Value". Application numbers for applications that have already been submitted will not be affected by the reset and will remain on hold.

6.4. Register Application Form Items

Set items in an application form for users to enter when submitting an application.

Manage Forms > Select the application category > from the list of application forms, click [Name] for the application form

List of Items of Application Form

Click [**Add Item**].

An item is registered by default. You can edit this item, but you cannot delete it.

Select an Item type to Add

* Select application form items from the **[Select item type to add]** pull-down menu and configure the advanced settings. The available settings vary depending on the application form item you select.

* When you add an item, you can add items continuously by selecting [Continue adding item].

1. Text Input
2. Multiple Rows Text
3. Pulldown
4. Radio
5. Checkbox
6. Number Field
7. Calculation
8. Date
9. Email Address Input Field
10. File Attachments

    * You can attach a local file. These features are optional. You need to apply to use them separately.

11. Drive File Attachments
12. Master Integration

    * You need to configure the initial settings when using it. See section "**10. Master Integration**" first.

13. Lookup
14. Separator
15. Heading

1. Text Input

① **[Item Name]**: Enter a name for the item ***Required**

② **[Width]**: Specify the width of the textbox by number. 20 characters by default.

③ **[Max Length]:** Specify the maximum number of characters that can be entered in the textbox.

④ **[Min length]:** Specify the minimum number of characters that can be entered in the textbox.

⑤ **[Limitation]:** You can specify whether to limit the input characters. You can choose from "No limitation", "Only full-width", and "Only half-width".

⑥ **[Required]:** You can require input in the text box.

⑦ **[Default Value]**

◆ **Direct Input:** You can set default numbers, symbols, and characters in the textbox.

◆ **User Information:** You can set applicant information as the default value in the textbox.

- **Name:** (Set the applicant's name as the default value)

- **Pronunciation:** (Set the pronunciation of the applicant's name as the default value*)

- **Email:** (Set the applicant's email address as the default value)

- **Job Title:** (Set the applicant's Job Title as the default value*)

- **Employee Number:** (Set the applicant's employee number as the default value*)

* To display it as the default value, you need to register it in the CSV file separately. For how to register a CSV file, see **appendixes 1 to 3** of this manual.

⑧ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑨ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox.

You can select [**Nothing**], [**Prepend**], or [**Append**].

⑩ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item on the left)

Tips

- You can also limit or fix the number of input characters by combining the "maximum number of input characters" and the "minimum number of input characters".

  Example1: Specify "Maximum number of input characters" 10 and "Minimum number of input" 22
  → You can limit the number of input characters to 10 to 22 characters.
  Example2: Specify "Maximum number of input characters" 8 and "Minimum number of input" 8
  → Fix the number of input characters to 8 characters.
  If you enter less than 8 characters, you will be prompted to enter 8 characters.

- By specifying the [Min length] and making the input optional (clear the [Required] check box),
  You can ask for "blank" or "input more than the minimum number of characters".

2. Multiple Rows Text

Multiple Rows Text

① **Item Name :**

② **Width :**
40

③ **Rows :**
3

④ **Required :**
☐ Required

⑤ **Default Value :**

⑥ **Description :**

⑦ **Prepend or append string to the item :**
Nothing ▾

⑧ **Put on the right side of the previous item :**
☐ Put on the right side of the previous item
String to be shown between the previous item and this one :

Back   Add Item

① **[Item Name]:** Enter a name for an item. *** Required**
② **[Width]:** Specify the width of the textbox by number. 40 characters by default.

③ **[Rows in the input field]:** Specify the number of rows in the item field. 3 rows by default.

④ **[Required]:** You can make it required to enter the textbox.

⑤ **[Default value]:** You can set default numbers, symbols, and characters in the field.

⑥ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑦ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox.You can select [**Nothing**], [**Prepend**], or [**Append**].

⑧ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item on the left)

3. Pulldown

② **[Item Name]:** Enter a name for an item. ***Required**

② **[Pulldown Options]:** Register pull-down items. ***Required**

- **[Enter input row]** (enter one item on a line)

  [Default Choice] (set items that are selected at the beginning by default. When not set, the first item entered directly is selected

- **[Org Unit]** Use to display the applicant's organization in the pull-down. When the applicant is a member of multiple organizations, the prioritized organization is selected first. A prioritized organization is an organization whose Primary is set to "1" when importing the user details

③ **[Required]:** Select to make the field required.

④ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑤ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox. You can select [**Nothing**], [**Prepend**], or [**Append**].

⑥ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item on the left)

4. Radio

① **[Item Name]:** Enter a name for an item. ***Required**

② **[Radio Items]:** Set radio button items. Enter one item on a line.

[Default Choice]: Set items that are selected with a radio button by default.

③ **[Layout]:** Sets whether radio button items are laid out horizontally or vertically.

④ **[Required]:** Select to make the field required.

⑤ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑥ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox. You can select [**Nothing**], [**Prepend**], or [**Append**].

⑦ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.

    Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item)

[Input screen in workflow]

▼ When "Line up horizontally" is specified

▼ When "Line up vertically" is specified

5. Checkbox

① **[Item name]:** Enter a name for an item. ***Required**

② **[Check by ddefault]:** Set to have items selected by default.

③ **[Required]:** Set to have items always selected.

④ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑤ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox. You can select [**Nothing**], [**Prepend**], or [**Append**].

⑥ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the

previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item)

* When display check boxes in a horizontal line

Enter "type of leave" for **[Item Name]**. Enter "paid leave" for **[Prepend or append string to the item]** and select [**Append**]. Click [**Add Item**].

Create new **check box** items next

Enter "type of leave" for **[Item Name]** from the check box [Create a form]. Enter "summer holidays" for **[Prepend or append string to the item]** and select [**Append**]. Select **[Put on the right side of the previous item]**. Finally, click [**Add Item**].

Checkbox

Item Name :

夏季休暇

Check by default :

☐ Check by default

Required :

☐ Required

Description :

Prepend or append string to the item :

[Append ▲▼] 夏季休暇

Put on the right side of the previous item :

☐ Put on the right side of the previous item

String to be shown between the previous item and this one :

[Back]   [Add Item]   ☐ Continue adding item

Create "child care leave" and "nursing care leave" in the same manner as "summer holidays."

* In addition, we do not recommend setting [**Required**] when multiple checkbooks are arranged horizontally.

* [**Required**] is suitable when a user has items recognized by selecting the items.

6. Number Field

Number Field

① Item Name :

② Width :
20

③ Limitation :
- ◉ No Limitation
- ○ Enable Limitation
- Max Value :
- Min Value :

④ Required :
- ☐ Required

⑤ Default Value :
- ◉ Direct Input

- ○ Associated Application's Item   税抜合計金額 ▾

⑥ Effective Digit :
0 ▾

⑦ Minus Value Format :
-1234 ▾

⑧ How to Display :
☐ Show Thousand Separator

⑨ Description :

⑩ Prepend or append string to the item :
Nothing ▾

⑪ Put on the right side of the previous item :
☐ Put on the right side of the previous item
String to be shown between the previous item and this one :

Back   **Add Item**   ☐ Continue adding item

① **[Item Name]:** Enter a name for an item. *** Required**

② **[Width]:** Specify the width of the textbox by number. 20 characters by default.

③ **[Limitation]:** Set to put restrictions to numbers that can be entered.
- **[No Limitation]** (select not to set any restrictions)

● **[Enable Limitation]** (You can set **maximum and minimum values** for single-byte numbers. The **maximum and minimum values** are **required** when you select **[Enable Limitation]**.)

④ **[Required]:** Select to make the field required.

⑤ **[Default value]:** You can set default numbers in the field. You cannot set character strings or symbols as default values.

⑥ **[Effective Digit]:** You can set up to 2 decimal places.

⑦ **[Minus Value Format]:** Set How to display negative values in the Workflow when entering a negative value. Negative values are expressed with one of the following 3 symbols: "-," "△," and "▲. "

⑧ **[How to display]:** Select to use thousand separator.

⑨ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑩ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox. You can select [**Nothing**], [**Prepend**], or [**Append**].

⑪ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item)

7. Calculation

① **[Item Name]:** Enter a name for an item. *** Required**

② **[width]:** You can set the width.

③ **[Effective Digit]:** You can set up to 2 decimal places.

④ **[Minus Value Format]:** Set How to display negative values in the Workflow when entering a negative

value.

Negative values are expressed with one of the following 3 symbols: "-," "△," and "▲."

⑤ **[Calculation] *Required**

- **Basic arithmetic operations** (you can set the basic arithmetic operations using constants, the numbers entered for the items created at "**6. Number Field**" and the calculation result entered for the items created at "**7. Calculation**")

- **Total** (the items you created at "**6. Number Field**" or "**7. Calculation**" are displayed on the right.

   Select the items whose total you wish to display and click [Add]. The total will be displayed on the left. To deactivate the items to total, select the items on the left and click [**Delete**])

⑥ **[Hide from the applications]:** Select if you do not want to display this calculation item on the applications.

(Example: When using the calculation result as an intermediate formula when calculating 3 or more terms)

⑦ **[How to display]:**

- **Show Thousand Separator** (Select to use thousand separator.)
- **Format as percentages** (Select this if you want to display the numbers as percentages. ("%" Is also included in the value displayed after calculation.))

⑧ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑨ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox. You can select [**Nothing**], [**Prepend**], or [**Append**].

⑩ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item)
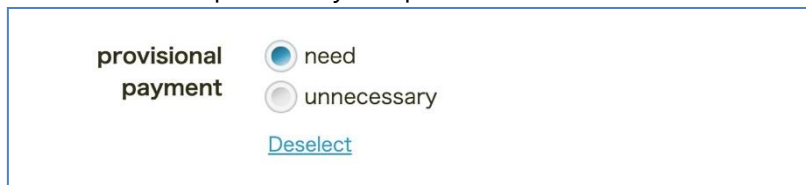
Attention

- When "Format as percentages" is specified in [How to Display], the following screens and files support display / output in percentage format.

User screen

・ Application screen (preview)   ・ Application form edit screen

・ Detailed screen of application form

・ Application print screen (timeline type / classic type)

rakumo Workflow Admin Console

・ Detailed screen of application form

・ Test screen of application route

・ Download application form (ZIP download only)

Please note that the result of downloading the CSV format applications from the rakumo Workflow admin console cannot be converted to the percentage format.

● When "Format as percentages" is specified in [How to Display], the setting of the number of significant digits after the decimal point is applied after conversion to percentage format.

Example: When the calculation result is 0.45213 and the number of significant digits is "second decimal place"

・ For normal format: 0.45

・ For percentage format: 45.21%

● The screens where the items are hidden when [Hide from the applications] are checked are as follows.

User screen

・ Application screen (preview)　・ Application form edit screen

・ Detailed screen of application form

・ Application print screen (timeline type / classic type)

rakumo Workflow Admin Console

・ Application preview screen

・ Test screen of application route

Please note that the following screens and files on the management screen will always be output even if the item is set to "Hide from the applications".

・ Detailed screen of application form

・ Download application form (ZIP format / CSV format) Application screen

8. Date

① **[Item Name]:** Enter a name for an item. *** Required**

② **[Default Value]**

- **[Current Date]** (displays the current date when entering in an application form)
- **[Specific Date]** (displays a specific date when entering in an application form)
- **[Not Specified]** (displays the current date field as blank when entering in an application form)

③ **[Date range to accept]:**

If you want to limit the date range, check "Set" and specify the start and end points of the range.

The left side is the start point of the range and the right side is the end point of the range. You can set

both the start point and end point, or you can set only one of them.

Specify the start point and end point of the range by combining the following contents.

Dates that can be used when specifying a range	Specify number of days
Application date	○ days before / ○ days after
Same day as application date	-
{other date field name}	○ days before / ○ days after
Same day as {other date field name}	-

Detailed information on this setting is provided on pages 53-55. Please refer to it when setting.

④ **[Required]:** Select to make the field required.
⑤ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑥ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox. You can select [**Nothing**], [**Prepend**], or [**Append**].

⑦ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the previous item.
Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item)

● About "Date range to accept"
・Precautions when specifying the range of dates that can be entered
- When setting both the start point and end point, set the start point to be on the same date as the end point or earlier. If you set a date later than the end point for the start point, you will not be able to complete the date entry when entering the application form.
- Rules with absolute dates (e.g. Dec 31, 2022) cannot be set.
- The date input range is checked using the rakumo time zone setting of the user who enters/edits the application form. For this reason, if you have a workflow in which applicants and approvers belonging to different time zones edit date items, depending on the combination of input range rules and time zones, the input range may change when the approver edits. check may result in an error.
Especially if there is a possibility that the date may go back in time between steps in the workflow, test thoroughly beforehand.

・The behavior of the input screen after setting

For example, if you set a date item that can be entered within the range [From the day of the other date item "Desired delivery date" to 30 days later], you will not be able to select a date outside the range when entering the application form.

Also, if you manually enter a date that is out of range, the message "This value is out of range." will be displayed and you will not be able to apply until you correct the value.

Also, if you manually enter a date that is out of range, the message "This value is out of range." will be displayed. The application cannot be submitted until the value is corrected to be within the range.
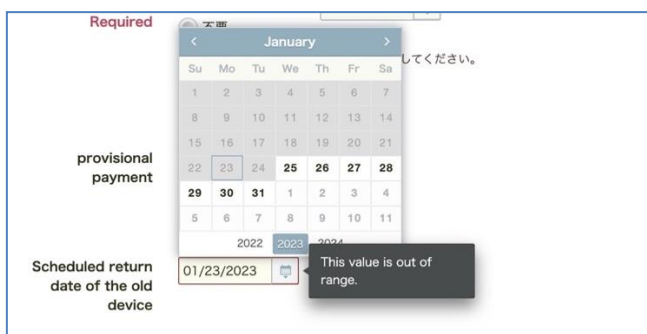
● When creating an item that specifies a date period

When you create an item for departure date, select [Continue adding item], click the [Add Item] button and create a scheduled return date.

For [Item Name], [Default Value], and [Required], enter the same as for departure date. Enter the "expected date to return to the office" for **[Prepend or append string to the item]** and select [**Prepend**]. Select **[Put on the right side of the previous item]** and enter "-" for words to be displayed after the previous item.

9. Email Address Input Field

You can determine if the item's input meets the email address format.

① **[Item Name]**: Enter a name for the item ***Required**

② **[Width]**: Specify the width of the textbox by number. 20 characters by default.

③ **[Max Length]:** Specify the maximum number of characters that can be entered in the textbox.

④ **[Required]:** You can require input in the text box.

⑤ **[Default Value]**

◆ **Direct Input:** You can set default numbers, symbols, and characters in the textbox.

◆ **User Information(E-mail):** Set the applicant's E-mail address as the default value in the text box.

⑥ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

⑦ **[Prepend or append string to the item]:** You can configure characters to be displayed outside of the textbox.

You can select [**Nothing**], [**Prepend**], or [**Append**].

⑧ **[Put on the right side of the previous item]:** You can place the textbox on the right side of the

previous item.

Characters displayed between the textbox and the previous item (You can display characters between the textbox and the previous item on the left)

10. File Attachments *

You can specify a file (local file) on your device and attach it directly to the application.
* Enables you to attach local files. This is an optional feature. You need to apply for it separately if you desire.

● Differences from "Drive File Attachments"
In the "Drive File Attachments", the file link on Google Drive is attached to the application,
In the "file attachments", you can directly attach files on your device to the application.
Since files directly attached to the application cannot be changed or deleted individually, it is possible to prevent files from being changed or deleted by mistake after the application.
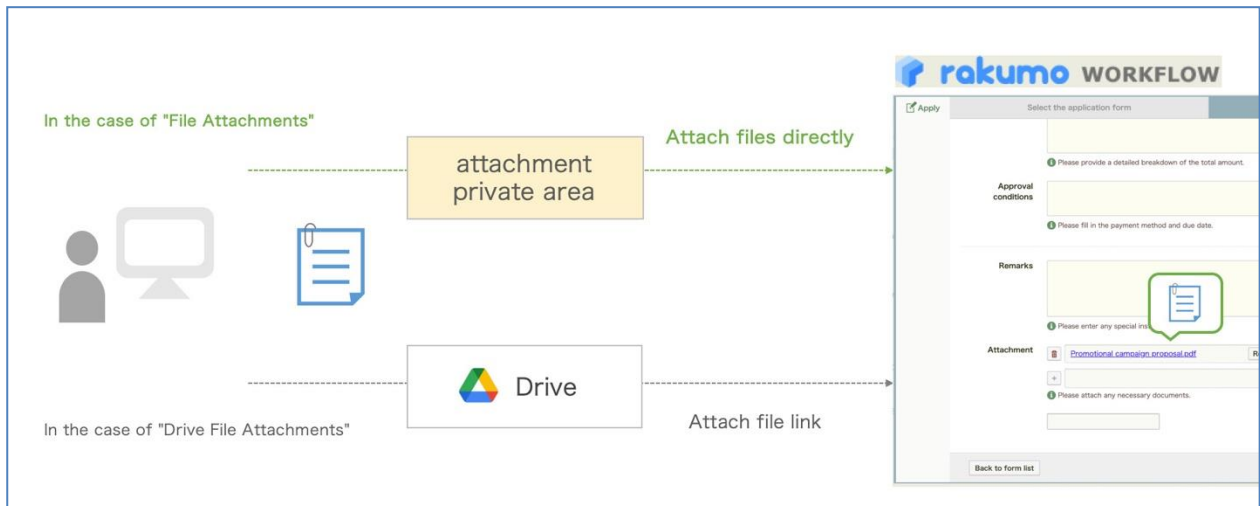
Comparison content	File Attachments	Drive File Attachments
File storage location	private area	Google Drive
How to view attachments	download or View on Google Drive	View on Google Drive
who can view the file	Users who can view the application *1	Users with view permissions for the file in Google Drive

File editing after application	Impossible *2	possible
Whether the file can be deleted	Files cannot be deleted individually *3	Files can be deleted individually
Maximum size of one file	32 MB	Comply with Google Drive limits
Organization-wide file storage limit	50 GB *4	Comply with Google Drive limits

*1 Applicant, user on the application route, workflow Admin, and category operator

*2 If editing is allowed for users on the application route in [Input and Editing Settings], users on the application route can replace files.

*3 Files can be deleted when editing is allowed for users on the application route in [Item input/edit settings]. After processing is completed in all route steps, the attached file can be deleted only by deleting the attached application.

*4 Additional storage capacity can be added with an additional contract.

- Item settings

① **[Item Name]:** Enter a name for an item. *** Required**

② **[Required]:** Select to make file attachment required.

③ **[Limit the file types that can be attached]:** Check this to limit the file formats that can be attached.

④ **[File types that can be attached]** ***:** Check the file formats that you want to allow attachments.

You can choose from <u>Word (doc, docx), Excel (xls, xlsx), PowerPoint (ppt, pptx), PDF, JPG, and PNG</u> formats.

The file formats that you are allowed to attach are displayed below the item.

(* Used only when "Restrict the types of files that can be attached" is checked in ③.)

⑤ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

Separately, you can set the viewing method of the file attached to this item.

For details, refer to **19. Setting the file viewing method when using the local file attachment function.**

11. Drive File Attachments

You can specify a file on Google Drive and attach a link to the Google Drive file to the application form.

<Initial settings>

Before using this feature, select [**Allow**] for the **Google Drive file attachment** on the General settings page.

Go to General Settings, select [**Allow**] and click [**Save Changes**].
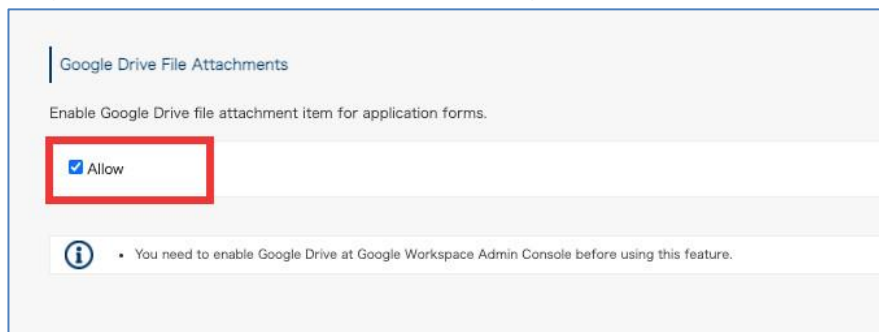
Go back to the Add Item page and configure the settings.

① **[Item Name]:** Enter a name for an item. *** Required**

② **[Required]:** Select to make file attachment required.

③ **[Limit the file types that can be attached]:** Check this to limit the file formats that can be attached.

④ **[File types that can be attached]** ***:** Check the file formats that you want to allow attachments.

You can choose from Google Docs, Google Sheets, Google Slides, PDF, JPG and PNG formats.

The file formats that you are allowed to attach are displayed below the item.

(* Used only when "Restrict the types of files that can be attached" is checked in ③.)

⑤   **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

12. Master Integration

Here you see information on how to link master data in the rakumo Workflow.

When you set link master data, you can display the data registered on Google spreadsheets on application forms.

* To use the master integration, you need to configure the master data first. See section 11. Manage Master Data page.

If you want to easily create an input item with hierarchical choices, it is convenient to use the "Lookup" item.

For the difference in what you can do, refer to the "Differences from Master Integration" section in the "Lookup" section.

① **[Item Name]:** Enter a name for an item. *** Required**

② **[Set Items]:** To add a linked item, click [**+Add item**].

③ **[Select master data]:** Select a column name on the Google Drive spreadsheets.

Select a spreadsheet for the master data from **Select master data.**

Next, select **a column to display** on the application form.

For other pull-down, select an external key to the master data that you additionally set.

④ **[Preview]:** Displays a preview of the linked master data that you set.

⑤ **[Columns to Add to Results]:** Among the master data of linked items set at the end, Select the columns that you wish to additionally display in the application, if any.

⑥ **[Required]:** Select to make the field required.

⑦ **[Description]:** Displayed as a description below the textbox. Line break and URL links are supported.

13. Lookup

Here you see information on how to lookup in the rakumo Workflow.

If you set a lookup, you can display the data registered in the spreadsheet of Google Drive on the application form.

* When using lookup, set the lookup datasource first. See the 12. Manage Lookup Data page.

● Differences from "Master Integration"

"Lookup" is an item similar to "Master Integration", but the settings have been greatly simplified and convenience has been improved.

Please refer to the table below for a comparison of what can be achieved with each item.

what you can do	Lookup	Master Integration
Choose a value from the choices listed in Google Sheets	○	○
Follow the hierarchical choices and enter the values	○	○
Keep only selected choices as values	○	✕ ※1
You can search for choices	○	✕
When you select an option, refer to (look up) the value in another column in the same row as the option on Google Sheets and reflect it in other input items of the application template.	○	✕
Used as a branch condition in the Branch Settings	✕	○
Concatenate multiple master data with a primary key and a foreign key, handle data that spans multiple spreadsheets in one item, or handle data that exceeds 10 columns.	✕	○
Refer to the second and subsequent sheets of the	✕	○

spreadsheet file		
Operate the reflection of spreadsheet data updates from the API	○	○

※1In the "Master Integration" item, in addition to the value of the choice itself, the hierarchical information and column name of the spreadsheet are included in the input value. (Example: If you select "Transportation" in the "Account" column, the value "Account:> Account: Transportation" is saved.)

- Item settings

① **[Item Name]:** Enter a name for an item. *** Required**

② **[Required]:** Select to make the field required.

③ **[Description]:** Displayed as a description below the Lookup. Line break and URL links are supported.

④ **[Select Lookup Datasource]:** Displays a preview of the linked master data that you set.

⑤ **[Application Items to reflect the value]:** Specifies whether to automatically insert the value corresponding to the value selected in "lookup" into other items (which column value of the lookup datasource is reflected in which other item).

There are five types of application form items that can be set as reflection destinations: "Text Input",

"Multiple Rows Text", "Pulldown", "Radio", and "Number Field".

Example: When automatically inserting the value in the "Category ID" column corresponding to the selected value into "Product Category ID (Text Input)"
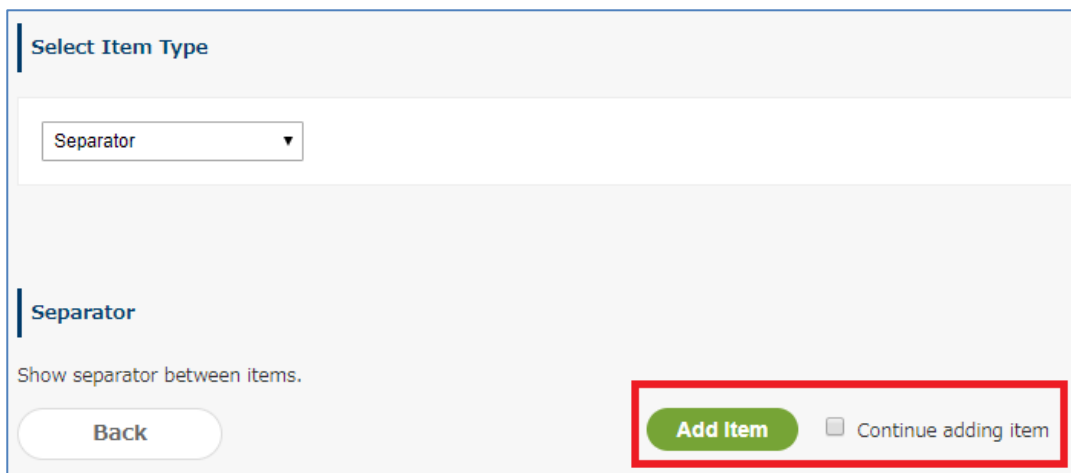
Application Items to reflect the value :
Please set Application Items that reflect the value referenced from the Lookup Datasource.
The types that can be linked are Text Input, Multiple Rows Text, Pulldown, Radio, and Number Field.

Column of Lookup Datasource		Application Item
商品カテゴリー	→	Not specified
大分類	→	Not specified
中分類	→	Not specified
小分類	→	Not specified
カテゴリーID	→	商品カテゴリーID（Text Input）

● Reference information: Specifications when reflecting values in other input items

・Only one item can be reflected for each column of lookup data.

・When you select a lookup item, unlike the calculation item, it will be reflected immediately on the screen after selection. Input check is also executed immediately.

・If there is a default value or an entered value for the item to be reflected, it will be overwritten at the time of reflection.

・If you return the lookup item to the unselected state, the reflected item will also be cleared.

・If the target item is "pull-down"(or "radio button") and there is no option that matches the reference value, the value cannot be reflected.

・If "Input and Editing Settings" is set and the reflection destination item cannot be edited at the time of inputting the lookup item, the value will not be reflected. It is recommended to match the editability of the lookup item and the reflection destination item.

・Since the reflection of the value is positioned as "input on behalf of the user", it is not possible to restrict "the value reflected in other items cannot be edited directly by the user".

14. Separator
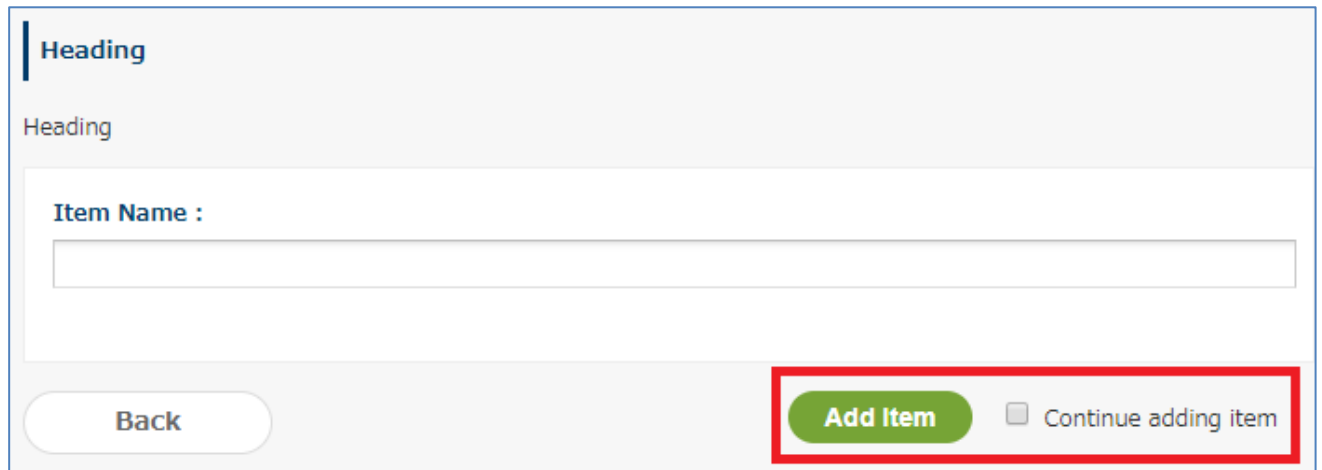
Set to insert a separator between items. Click [**Add Item**] when you are finished.

15. Heading

Set this item to add a heading to the items entered in the application form. Click [**Add Item**] when you are finished.

6.5. Setting a shared route in the application form

Link the application route created at **7.2 Create a shared route** with an application form.

Manage Forms > Select the application category > from the list of application forms, click **[Name]** for the application form.

Click [**Use Shared Route**] on the **Application Route Details** page.

Set an application route for the form on the Route Settings page.

The [**Summary of Appl. Route**] and [**Appl. Route Steps**] you select are displayed.

Click [**Set as Route**]. The form and shared route are linked.

6.6. Reset the Application Route

you can return the application template to the status that has not been set route.

* After resetting, the settings cannot be restored.

Manage Forms > Select the application category > from the list of application forms, click **[Name]** for the application form.

Click [**Reset Route**] on the **Application Route Details** page.
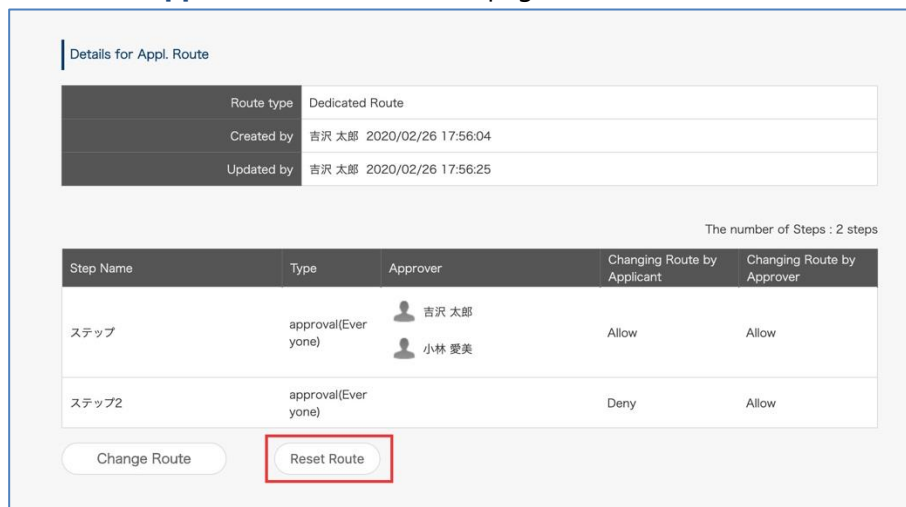
If you select "OK" in the displayed confirmation dialog, the route of the application form will be reset.

* If you reset the application form route, the application form will be invalidated and you will not be able to apply until you set the route and start accepting again.

● About reset operation behavior

What you reset depends on the type of application route that is configured.

・ If the application template has a dedicated route, the dedicated route will be deleted.

・ If the shared route has been set, the link between the application form and the shared route is canceled. (The shared route itself is not deleted.)

6.7. Set Branches for Application Routes

In the branch settings, it is possible to control which steps are displayed in the actual application route based on the input contents of the application form at the time of application.

Example use:

　・Control the range of authorizers who need approval depending on the amount entered in the application

　・When the applicant is a manager, skip the approval step on the route that requires the applicant's own approval

　・Create an application that allows applicants to add steps to the route as needed

etc

6.7.1. Add branch settings

　<Preparation>

For branch setting, use the application form items and the route information setted to the application form.

　・Before setting the route branch, set the application route (*) to the application form.

→　For details on how to link shared routes, refer to **6.5 Setting a shared route in the application form.**

→　For details on how to set up a dedicated route, see **7.4 Creating a dedicated route.**

(*) In the route branch setting, set which step in one application route is to be displayed. For this reason, all steps that appear after you apply a branch condition must be added to the route used for the branch configuration in advance.

　・Referring to [Application Form Items] of the application form used for branch setting, check that the item used for the condition is created and the item type can be used for branch setting.

For items that can be used as branch conditions and conditions that can be set, refer to **Items that can be branched and the conditions** at the end of this chapter (P. 60).

　<Setting procedure>

1. From rakumo Workflow Admin Console > Manage Forms, open the application Form details screen.

Manage Forms URL: https://a-rakumo.appspot.com/workflow/admin/appform/

2. Click [Set Appl. Route Branch] in the branch settings.
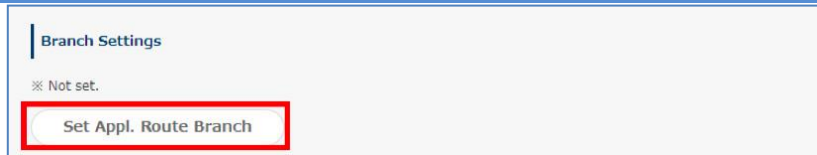
3. When the branch settings screen is displayed, click "Add branch setting".

4. The add branch setting screen is displayed. Set one branch setting on this screen.

   Specify Branch Name, Branch condition, and Route of this Branch.

   ① **Branch Name** *** Required**

      Enter a branch name. It is convenient to input in a form that understands the branch conditions.

② **Branch condition**

Select the item and specify the content that will be the condition for branching the route. In the item selection pull-down, only the "item name" of the items that can be used as branch conditions among the items set in the application form are displayed.

For items that can be used as branch conditions and conditions that can be set, refer to **Items and branch conditions that can be set** at the end of this chapter (P.60).

③ **Route of this Branch**

Check the steps to be displayed in the route when the conditions are met.

5. After completing the input, click "Add".

6. On the branch setting screen, check that the created branch setting has been added.

7. Repeat steps 3 to 6 to create multiple branch settings.

This is the end of adding branch settings.

If you create multiple branch settings, make sure they have the appropriate priority.

For details, see **6.6.2 Changing the priority of branch settings**.

Also, **6.6.3 Example of branch settings** introduces the branch setting procedure with a specific example.

Please refer together.

Added branch will be displayed in **Branch Settings**.

Branch Settings

Branch Settings	Route of this Branch
交際費かつ10万円未満	第1ステップ
交際費かつ10万円を超える	第1ステップ　第2ステップ

Set Appl. Route Branch

Items that can be branched and the conditions

Types of form items displayed in applications	Condition symbols					
	= Equal to***1**	**≠** Not equal to***2**	**≥** Or more	**≤** Or less	**>** Greater than	**<** Less than
Application department ***3**	○	○	-	-	-	-
Text Input *4	○	○	-	-	-	-
Pulldown *5	○	○	-	-	-	-
Radio	○	○	-	-	-	-
Number Field	○	○	○	○	○	○
Calculation	○	○	○	○	○	○
Master integration ***6**	○	○	-	-	-	-

*1 You can specify more than one condition by delimiting them with a comma. In such cases, the condition "equal to either one of them" is applied.

*2 You can specify more than one condition by delimiting them with a comma. In such cases, the condition "not equal to either one of them" is applied.

*3 You can specify either a group name or a group ID as a condition. To use an application department as a condition, go to the General Settings and select [Enable] for Application Department. When you deselect [Enable] for Application Department after setting an application department as a condition, the condition is disabled. You can only delete this condition.

*4 You can also set [title] as branch conditions.

*5 Can be used as a branch condition even when [Org Unit] of which one is a member are set to be displayed, but cannot display the superiors in accordance with the organizations of which one is a member.

*6 When the data is in a hierarchical structure, you can configure the settings with the items on the lowest level as conditions. The [Columns to Add to Results] you set at the Edit Master Integration page are displayed as items to select from.

[Application form items to which branch settings cannot be applied]

Multiple Rows text, checkbox, Date, Drive File attachments, File attachments, Lookpu, Separator, Heading, and priority

[Points to note regarding branch conditions]

- In application routes that are not applied to any branch settings, all the route steps set are displayed, as no branches are carried out.

- Branches are applied only when an application is submitted (includes when an application is re-submitted). No branches are carried out when an approver has modified the branch conditions in the application form.

6.7.2. Changing the priority of branch settings

When multiple branch settings are set for one application form, it is possible to specify which branch setting is used for judgment.

● Branch condition judgment and order

When multiple branch settings exist, judgment is performed in order from the branch setting with the highest priority (smaller number). When a branch setting that matches the conditions is found, the judgment ends, and the branch setting is applied. Judgment is not performed for branches with lower precedence.

When the branch settings are saved, the priority of "Number of branch settings existing at the time of creation + 1" is automatically assigned as the initial value.

If you have set multiple branch settings, check the priority and <u>change the priority so that the priority of branch settings with more restrictive conditions is higher.</u>

<Setting procedure>

1. From rakumo Workflow Admin Console > Manage Forms, open the application Form details screen.

Manage Forms URL: https://a-rakumo.appspot.com/workflow/admin/appform/

2. Click [Set Appl. Route Branch] in the branch settings.

3. Check the current order on the branch setting screen.

4. If you need to change it, click "Change the order" to open the branch setting order change screen.

5. Select the branch setting you want to change the priority of, and click "Top", "Up", "Down", or "Bottom" to change the display position.

Those that appear at the top of the list have higher priority, and those that appear at the bottom of the list have lower priority.

6. To change the order, click "Change order" on the branch setting screen.

7. On the branch setting screen, confirm that the order has been changed.

That's all for changing the priority.

6.7.3. Example of branch settings

This chapter introduces the setting flow and the specific setting contents when actually performing the branch setting.

● Behavior you want to achieve

In the "Expense Reimbursement Application",

(1) Regarding entertainment expenses with a total amount of less than 100,000 yen, approval by the officer is not required.

([Approval by section manager → Approval by department manager → Approval by purchaser → Accounting circulation] is displayed in the application route)

(2) All expenses related to expenses exceeding 100,000 yen and other expenses require the approval of officers.

([Approval by section manager → Approval by department manager → Approval by officer → Approval by purchaser → Accounting circulation] is displayed in the application route)

Step 1 Prepare the application route for branch setting

Before performing the branch setting, The Details of "Expense Reimbursement Application" > Appl. Route Steps to check whether the application route linked to the application form template includes all the steps that you want to display after applying the branch condition.

In this setting, an application route that has the following five steps is required.

[Approval by section manager] → [Approval by department manager] → [Approval by officer] → [Approval by purchaser] → [Accounting circulation]

If the application route does not include all the steps you want to display after applying the branch settings, access the application route details screen from the [Details for Appl. Route] and add the step, or create a new application route for branch settings from [Manege Routes] and link it to the application form.

Step 2 Set branch settings
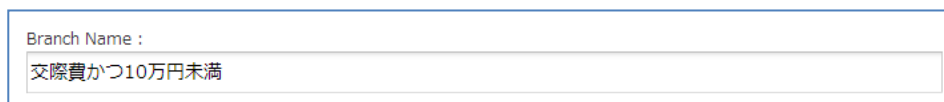
After completing the preparation of the application route, let's set the branch.

In this setting, add the branch setting [Do not display the "Approval by officer" step when "Entertainment expenses" is selected in the item "expense item" and the total amount is less than 100,000 yen).

The Details of "Expense Reimbursement Application" > Click [**Set Appl. Route Branch**] on the **Branch Settings** ,and move to the **Branch Settings** page, click [**Add Branch Setting**].The [**Add Branch Setting**] page is displayed.

1. Enter the **branch name**.

    Here, enter "Transportation costs and less than 100,000 yen" so that you can understand the branching conditions.
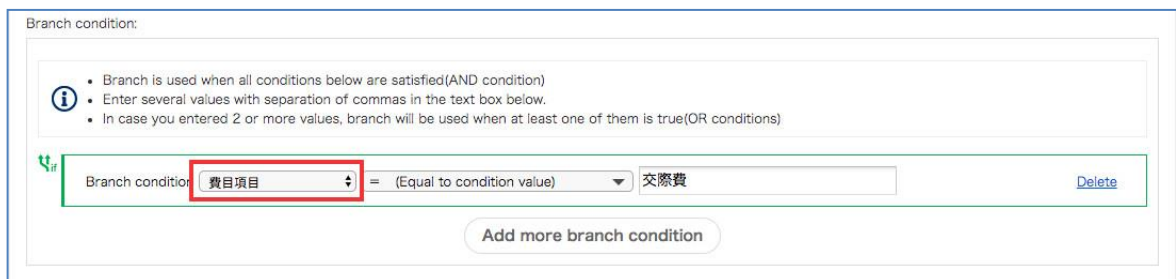
    > Branch Name :
    > 交際費かつ10万円未満

2. Configure **[Branch condition].**

    In this setting, two items are set as branching conditions: **the value of the item "expense item" is equal to "accounting expense"** and **"total amount is less than 100,000 yen"**.

    First, set the first condition **"Item" Expense item "is equal to" accounting expense ""**.
    （1）From the left pull-down, select the item "Expense Item" to be used for the condition.
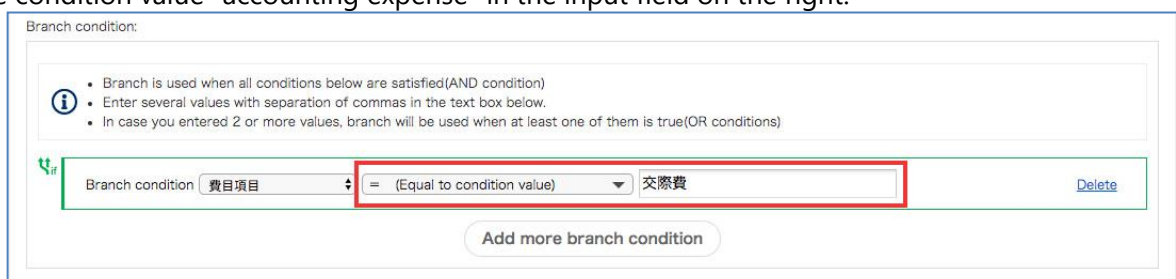
    > Branch condition:
    > - Branch is used when all conditions below are satisfied(AND condition)
    > - Enter several values with separation of commas in the text box below.
    > - In case you entered 2 or more values, branch will be used when at least one of them is true(OR conditions)
    >
    > Branch condition [費目項目 ▼] = (Equal to condition value) ▼ 交際費   Delete
    >
    > Add more branch condition

    （2）Select the condition symbol "=" (equal to condition value) from the center pull-down, and enter the condition value "accounting expense" in the input field on the right.

    > Branch condition:
    > - Branch is used when all conditions below are satisfied(AND condition)
    > - Enter several values with separation of commas in the text box below.
    > - In case you entered 2 or more values, branch will be used when at least one of them is true(OR conditions)
    >
    > Branch condition [費目項目 ▼] = (Equal to condition value) ▼ 交際費   Delete
    >
    > Add more branch condition

    Next, set the second condition **"Total amount is less than 100,000 yen"**.

    （1）Click [**Add more branch conditions**].

（2）Select the item [Total Amount] on which you set branch conditions and enter "< (Less than condition value)" for a sign and type "100000" in the text box.

3. Configure **[Route of this Branch]**.
   In this setting, check the four checkboxes "Approval by section manager", "Approval by department manager", "Approval by purchaser", and "Accounting circulation", which are the steps you want to display when "Transportation and less than 100,000 yen" is satisfied.

4. Click the [Add] button to save the branch settings.

5. Check that the branch setting has been added on the **branch setting** screen.

6. Check that the branch setting has been added on the **branch setting** screen.

The branch setting has been added. Finally, check the behavior of the actual application route.

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Step 3 Check on the user screen whether the behavior is as intended

Check whether the actual application route behavior has been changed to [Achieved Behavior] by adding the branch setting.

In this setting, verify the following: (1) If the contents of the application form match the conditions of the branch setting, the "Approval by officer" step is skipped. (2) If the contents of the application form does not meet the conditions of the branch setting, all step routes of the application Is displayed.

Click the application screen URL displayed in [Open this form] on the application form template details screen to display the application screen for the "Expense settlement application form"

 (1) If the contents of the application form match the conditions of the branch setting, the "Approval by officer" step is skipped.

Operation: On the application screen, select "accounting expense" for "expense item", enter "99999" for "Total amount", and press the "Confirm" button.

Confirmation contents: It is OK if you can confirm that the following four steps are displayed in the application route on the confirmation screen: [Approval by section manager → Approval by department manager →Approval by purchaser → Accounting circulation]

(2) If the contents of the application form does not meet the conditions of the branch setting, all step routes of the application Is displayed.

Operation: Click "Back to input screen" to return to the application screen, change the value of "Total amount" to "100000", and press the "Confirm" button.

Confirmation contents: It is OK if you can confirm that the following five steps are displayed in the application route on the confirmation screen: [Approval by section manager → Approval by department manager → Approval by officer → Approval by purchaser → Accounting circulation]

The setting is now complete.

6.8. Entering/editing items of application Forms

You can set whether you permit an approver of an application route linked to an applicant and application form to enter/edit items for an application form.

Example use:

- Entry of specific items at the time of application if you want to permit entry only at the time of approval, such as [Accounting department section] and [Approver comment section].

- Set to prevent entered values in items taken over from an association source at the time of associated application and guarantee that the details at the time of approval are the same as those of the associated application form.

- Combining with [Default value], prevent [Automatically set values such as names] at the time of application from changing.

- In case there is such a minor mistake as not requiring the application to be returned to the applicant, an approver can correct it and give approval

etc.
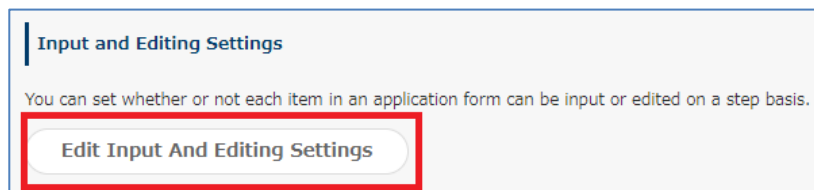
This setting is displayed when the settings have been configured to link the application form and application route.

Settings of entering/editing items

By default, "Application" steps are set to [Inputable] and steps on application routes are set to [Not Editable].

You can set whether or not each item in an application form can be entered/edited on a step basis.

- For an application step... When you click [**Inputable**], [**Not Enterable**] is displayed instead.
- For a step on an application route... When you click [**Not Editable**], [**Inputable**] is displayed instead.

* When you set [Not Enterable] for an application step, set [Not Enterable] for the application step after selecting [Editable] on an application form for which entry is permitted first.

Click [**Save Changes**]. The settings are saved.

[Points to note regarding settings of entering/editing items]

- This setting is valid for application forms that are submitted after it has been configured. Note that **this setting is not valid for application forms saved as drafts and application forms that are submitted before they have been configured**.

- If [Required] has been specified in the settings for items of an application form, **entry becomes required for the first time at the time when the items can be entered or edited.**

    Example: When you set [Not Enterable] at the time of application, Step 1 [Not Editable] and Step 2 [Inputable] for an item
        -> Entry in Step 2 is required. The approver of Step 2 cannot perform approval processing until the application form is edited and values for the items are entered.

- **You cannot configure settings that cannot be entered in all steps on application routes and at the time of application.** Thank you for your understanding.

6.9. Set the post-step action

You can set it to run any process (Action) related to the application.

The processing of the action occurs when the application moves from one step in the application route to the next.

There are two types of post-step actions that can be currently set:

- ・ Cloudsign Integration:

    You can send documents such as contracts using Cloudsign.

    * For details, refer to the chapter "20. CloudSign Integration".

- ・ Notification Action:

    You can send a notification email to any destination (up to 10).

- ・ Webhook Action:

You can automatically send a webhook to an external system.

* For details, refer to the chapter "21. Setting Webhook Actions".

There are two check methods for rakumo workflow.

Please select the check method according to the range you want to check.

6.9.1. Enable the "Post Step Actions Feature"

In the initial state, actions feature is in the "disabled" state.

Please enable it as a Google Workspace privileged administrator or rakumo administrator before making the settings.

<Screen to operate>

rakumo Admin Console > Workflow Settings

https://a-rakumo.appspot.com/admin/settings/workflow

<How to enable actions feature>

1. Go to rakumo Admin Console > Workflow Settings.

2. Check Enable in the Post Step Actions Feature section.

3. Check the action you want to enable and leave the check for the action you want to disable blank.

    Example: When only "Notification Action" is enabled.

4. Click "Save".

This completes the activation of actions feature.

Then set the action.

● Reference information

If the action was enabled before the update on May 23, 2022, both "Notification Action" and "CloudSign Integration Action" will be treated as enabled after the update.

Please be assured that the settings before the update will be inherited and the existing settings will not be affected.

6.9.2. Add post-step actions

We will specify "which action is to be executed in which route step" on the detail screen of the application form.

\<Preparation\>

Before setting the action, please set the application route in the application form.

(For details, please refer to [7. Set an Application Route].)

\<Screen to operate\>

rakumo Workflow Admin Console > Manage Forms

https://a-rakumo.appspot.com/workflow/admin/appform/

\<Action setting method-Overall flow-\>

1. Access "rakumo Workflow Admin Console > Manage Forms" and open the details screen of the application form for setting the action.

2. Click "Add Post Step Action" in the "Details for Appl. Route" section.

3. In the pull-down menu in the Select Action Type section, select the action you want to configure and set the execution settings details. (* For the setting contents, refer to the "Setting items for each action" section below.)

Home / Manage Forms / The Details of "IT製品購入申請" / Add Post Step Action

⚙ Add Post Step Action

Set the action to be taken when each step of the application form "IT製品購入申請" is finished.

Select Action Type

Select the type of action to be executed when a step is finished.

```
✓ (Select action type)
  CloudSign Integration Action
  Notification Action
  Webhook Action
```

↓

Exection Settings of "Notification Action"

Send a notification message to specific email addresses. Please set the email addresses, subject, fixed text of the body, and language.

Action Name (20 characters or less)

Notification Action

When to Execute an Action

Takes an action when the selected step finished.

Application Route Step: 作業1 ▼

Email Addresses :

Multiple addresses can be set separated by commas. (Up to 10)

admin@demo.gigei.co.jp

Email Subject :

The following substitution characters can be used. (Up to 100 characters)

- %TITLE% …… Application Name
- %FORM% …… Application Form Name
- %NUMBER% …… Application Number

Notification of purchase procedure completion - %TITLE%（%NUMBER%）

Email Body (Fixed Text 1) :

You can specify a fixed text to be included at the beginning of the email body. (Up to 1,000 characters)

Completed the purchase procedure.

Email Body (Fixed Text 2) :

You can specify a fixed text to be included at the end of the email body. (Up to 1,000 characters)

Please wait for a while until the goods arrive.

Email Language :

English ▼

[Add Action]

4. Finally, click Add Action.

This completes the action settings.

When the settings are complete, the set actions will be displayed in "Details for Appl. Rout" on the details screen of the application form.

- When the action to be set cannot be selected from the pull-down menu in step 3.

Check if the action function enable setting is set correctly. (→ 6.9.1. Enable the "Post Step Actions Feature")

<Setting items for each action>

1. CloudSign Integration

We will guide you through the flow of settings when using the service, including settings other than actions, in the chapter "20. CloudSign Integration". Sorry to trouble you, but please refer to the above chapter.

The action execution setting items are introduced in the chapter "20.3.3. Add CloudSign Integration action to route step".

2. Notification Action

Exection Settings of "Notification Action"

Send a notification message to specific email addresses. Please set the email addresses, subject, fixed text of the body, and language.

① Action Name (20 characters or less)

Notification Action

② When to Execute an Action

Takes an action when the selected step finished.

Application Route Step: 作業1

③ Email Addresses :

Multiple addresses can be set separated by commas. (Up to 10)

admin@demo.gigei.co.jp

④ Email Subject :

The following substitution characters can be used. (Up to 100 characters)

- %TITLE% ······ Application Name
- %FORM% ······ Application Form Name
- %NUMBER% ······ Application Number

Notification of purchase procedure completion - %TITLE%（%NUMBER%）

⑤ Email Body (Fixed Text 1) :

You can specify a fixed text to be included at the beginning of the email body. (Up to 1,000 characters)

Completed the purchase procedure.

⑥ Email Body (Fixed Text 2) :

You can specify a fixed text to be included at the end of the email body. (Up to 1,000 characters)

Please wait for a while until the goods arrive.

⑦ Email Language :

English

Add Action

---

① **[Action Name]:** Enter a name for an action. *** Required**

② **[When to Execute an Action]:** Select the step to perform the action after passing. (* 2,3)

③ **[Email Addresses]:** Specify the recipient of the notification email.
You can set multiple addresses separated by commas. (Up to 10 / * 4)

④ **[Email Subject]:** Set the subject of the notification email. (Up to 100 characters / * 5)
The following substitution characters can be used.

・%TITLE% ...... Application Name

・%FORM% ...... Application Form Name

・%NUMBER% ...... Application Number

⑤ **[Email Body (Fixed Text 1)]:** You can specify a fixed text to be included at the beginning of the email body.

You can also enter line breaks in the text. (Up to 1,000 characters / * 6)

⑥ **[Email Body (Fixed Text 2)]:** You can specify a fixed text to be included at the end of the email body.

You can also enter line breaks in the text. (Up to 1,000 characters / * 6)

⑦ **[Email Language]:** You can select the language that describes the non-customizable part (* 6) other than the one specified in "Email body (fixed text 1, 2)".

You can choose from Japanese, English, and Chinese.

*1 "Action name" is displayed at the execution position on the route.
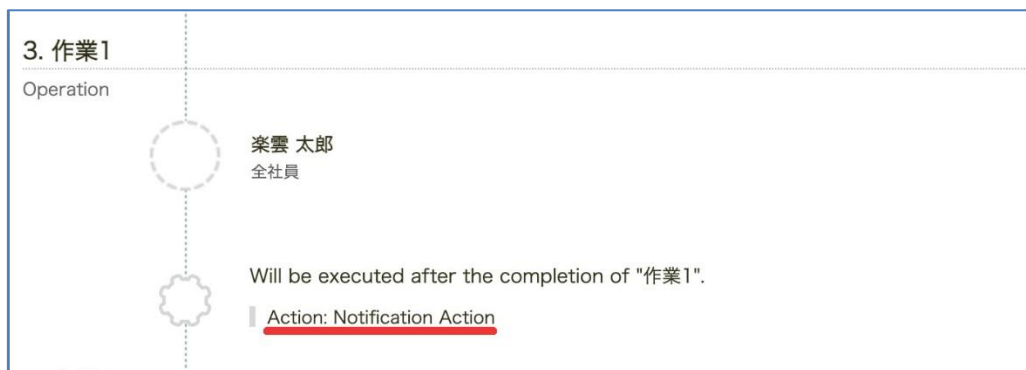
*2 For candidates, the steps of the application route linked to the application form are displayed in a list. For details of each step, see "Steps of Appl. Route" at the bottom of the page.

*3 After the processing in the step selected in "When to Execute an Action" is completed, the action is automatically executed just before the application form advances to the next step. Therefore, no action will be taken if the application is rejected or remanded.

*4 You can also register an email address other than the domain used in Google Workspace as the recipient's email address. Please be careful not to specify the wrong address.

*5 This limit is the maximum number of characters that can be entered at the time of setting.

Notifications can be sent even if the subject of the actual notification email exceeds 100 characters as a result of entering a value for the replacement character.

*6 Please refer to the image below for the insertion part of "Email body (fixed Text 1)" and "Mail body (fixed Text 2)" and the part that cannot be customized.

- Reference information:

    ・"Notifications@rakumo.com" is used as the sender email address when executing the action.

    ・Email is the only notification method available for the Notification Action. Notifications by Slack are not supported. Please note.

    ・To view the contents of the application form from the URL provided in the notification email, you still need to log in as a user who has access to the application form in the rakumo workflow.

3. Webhook Action

The "Webhook action" settings require some settings in addition to the action settings.

The flow of settings at the time of use, including settings other than actions, is explained in the chapter "21. Setting Webhook Actions". Sorry to trouble you, but please refer to the above chapter. The action execution setting items are introduced in the chapter "21.3.2. Adding a Webhook action".

6.10. Check the created application template and application route

You can check how the created application template and application route are actually displayed.

There are two check methods for rakumo workflow.
Please select the check method according to the range you want to check.

· Preview the Form

The application screen using the application form can be displayed in a pseudo manner.

In the preview, you can check the layout of the application screen and how the contents set for items such as initial values and required items are displayed.

Since only the preview of the application screen is targeted, you can use the preview function even in the application form where the application route is not set.

→For details, refer to **6.10.1. Preview the application screen of the created application form**

· Test the application

By specifying an arbitrary user, you can check the display contents of the application screen and the application route when the specified user applies.It can be used only with the application template with the application route set.

Since it is possible to confirm including whether the application route is displayed as intended,this is convenient for checking when you have made complicated application route settings (such as setting the superior or branching the route according to the input contents).

→For details, refer to **6.10.2. Test the application screen and application route of the created application form**

6.10.1. Preview the application screen of the created application form

You can check how the application screen of the created application form is displayed.
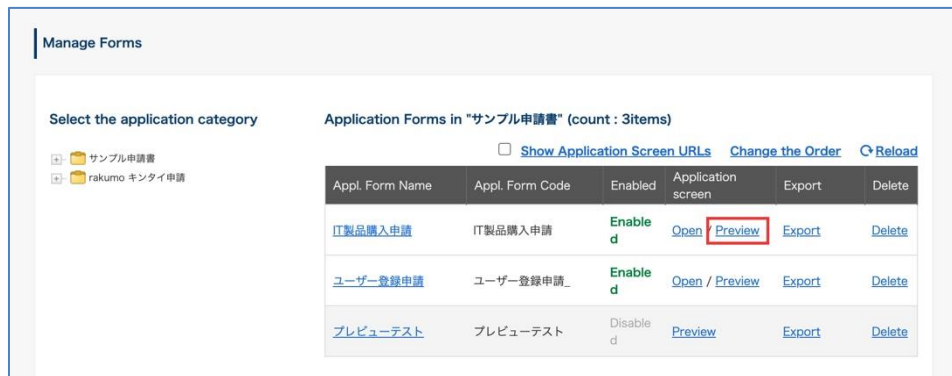
There are two ways to check the application screen of the created application form: "Preview this Form" and "Open".

◇ Confirm application screen from preview

You can check how the application screen layout, contents set in the initial value, required items, etc. are displayed. You can check the preview regardless of whether you have accepted an application that uses the application form.

A. Preview from application forms list

1.Manage Forms > Select the application category > from the list of application forms, click [**Preview**] for the application form.

2. Another tab will open and a preview of the application will be displayed.

B. Preview from application form details screen

1.Manage Forms > Select the application category > from the list of application forms, click [Name] for the application form
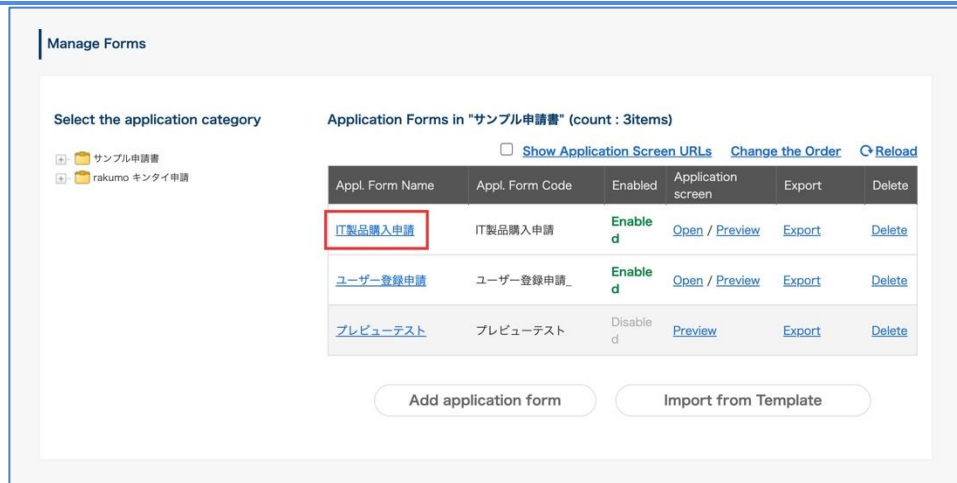
2.Click [Preview this Form] on the details screen of the application form.
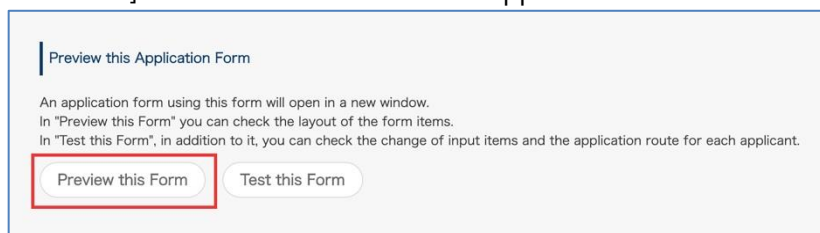
3. Another tab will open and a preview of the application will be displayed.

◇ Confirm application screen from Open

The actual user screen can be displayed to check how the application screen and application route are displayed. This is useful when you want to grasp the flow of screen transitions at the time of application, or if you want to check whether the intended route is displayed at the time of application.

A. Open from application forms list

1.Manage Forms > Select the application category > from the list of application forms, click [**Open**] for the application form.
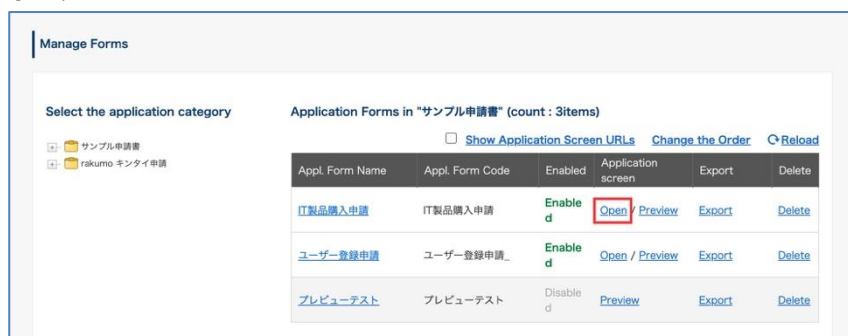
2. Another tab opens and moves to the user screen, and the actual application input screen is displayed.

B. Open from application form details screen

1.Manage Forms > Select the application category > from the list of application forms, click [Name] for the application form

2. Click the application screen URL on the details screen of the application form.

3. Another tab will open and a preview of the application will be displayed.

Notes on checking the application screen from "Open"

Only when both of the following two points are met, you can check the actual application screen from "Open".

- Applications using the application form are accepted ("Enabled" column in the list is **Enabled**)
- The user who performs the operation has access authority to the application category that includes the application form.

If an error is displayed when you try to display the actual application screen from "Open", please check the above points and consider changing the settings.

If you want to know more about accepting applications using application forms,please refer to **6.10. Enable/disable an application form you created**.

If you want to know more about the access authority to the application category, please refer to **5.5. Register Users That Can/Cannot Access Application Categories**.

6.10.2. Test the application screen and application route of the created application form

By specifying any user, you can check the display contents of the application screen and the application route when the specified user applies.

<Preparation>

This function can only be used with the application form with the application route set.

Before performing the test, set the application route in the application form to be set.

→ For details on how to link shared routes, refer to **6.5 Setting a shared route in the application form**.

→ For details on how to set up a dedicated route, see **7.4 Creating a dedicated route**.

<Operation procedure>

1.Manage Forms > Select the application category > from the list of application forms, click [Name] for the application form.
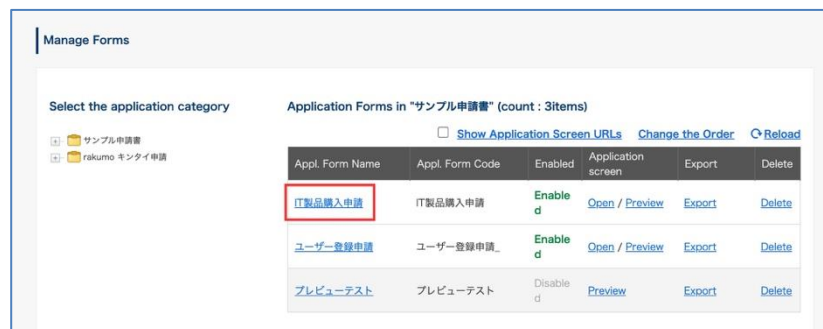
2.Click [Test this Form] on the details screen of the application form.
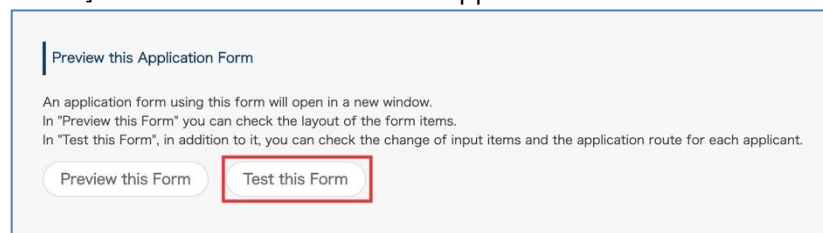
3. The application test screen will be displayed on another tab of the browser.
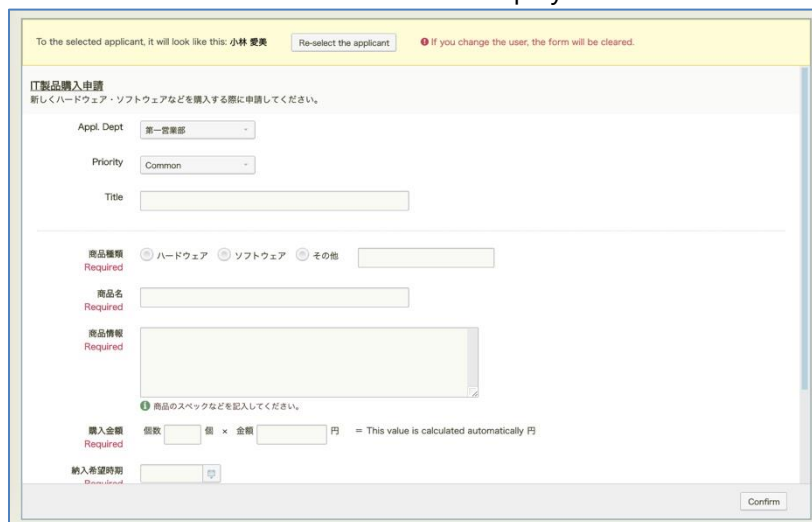
Click "Select the applicant ...".
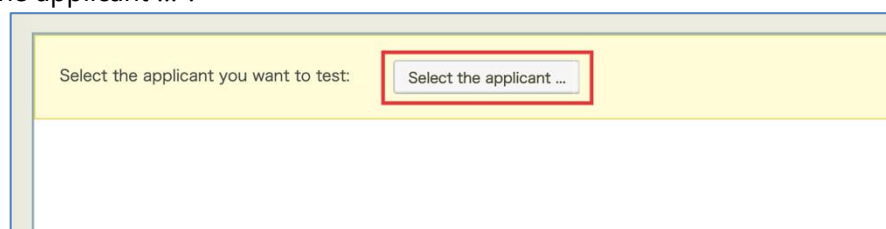
4. Select the applicant you want to test and click "Test with Selected User".
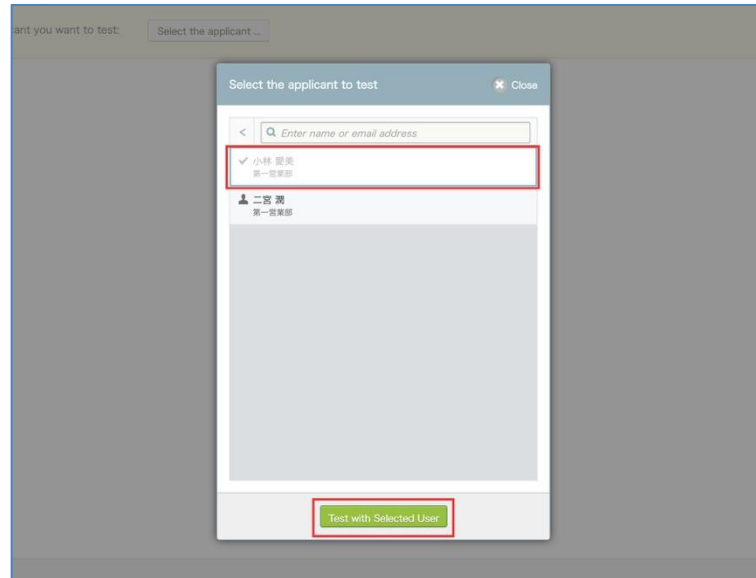
5. The application screen seen from the selected user is displayed.

6. Enter the required input items and click "Confirm".

7. The details of the application and the application route are displayed.

In the application route, the processing user when the specified user applies with the displayed contents is displayed.

8. If you want to test multiple users, you can click the "Re-select the applicant" button to change the applicants and start the test again.

What should I do in this situation?

・The application route is not displayed as intended.

Please check whether the selections and input contents at the time of application test match the contents you want to test.
If there is no problem in the content at the time of application test, please check if the route is set properly.

The following support page describes some common symptoms when application root display is not successful. This page is only in Japanese, but please read this page if you like.

https://help.rakumo.com/r/article?site=SH1NFEJ2&id=1093

6.11. Enable/disable an application form you created

Before setting an application form to Enable, assign an application route to the application form.

- Shared route → Refer to **6.5. Setting a shared route in the application form.**
- Dedicated route → Refer to **7.4. Creating Dedicated Route.**

Manage Forms > Select the application category > on the list of application forms, click [**Name**] on the right of an application form.

Click [**Open this Form**] at **Open this Form**.

By performing the above operations, the application form will be displayed on the user screen, and users will be able to apply using this application form.

To disable an application form, click [**Close this Form**].

By performing the above operation, the application form will not be displayed on the user screen, and users will not be able to apply using this application form.

In addition to the application form details screen, you can also check the application acceptance status of each application form from the "Enabled" column in the Manage Forms > Application form list.

If the application is accepted, it will be displayed as "**Enabled**", and if the application has not been accepted, it will be displayed as "Disabled" (and the line is grayed out).

6.12. Obtain the application screen URL

You can get the application screen URL of the created application form.

This is useful when you want to set up a link to the application form in the company portal, or when you want to manage a list of application form names and URLs.

There are two ways to obtain the application form application screen URL from the rakumo Workflow Admin Console.

◇ Obtain from the application form details page

1. Manage Forms > Select the application category > from the list of application forms, click [**Name**] for the application form.

2. Click "Copy URL" on the application form details screen.
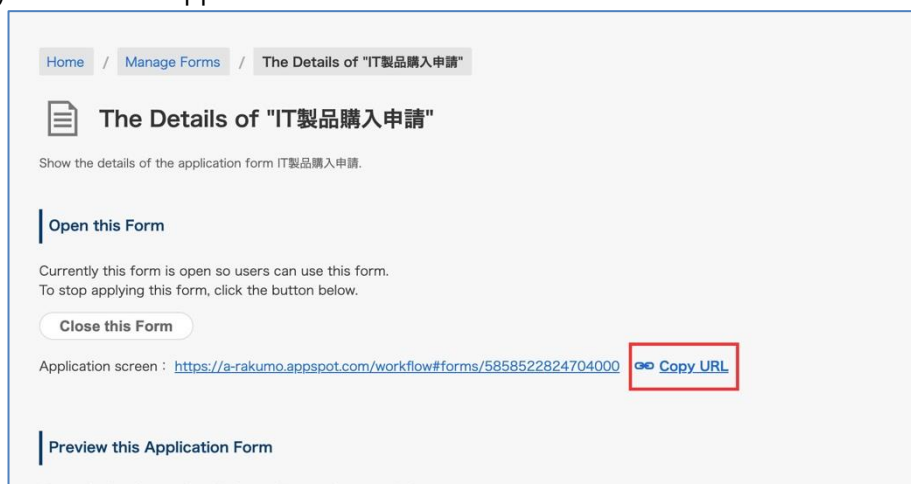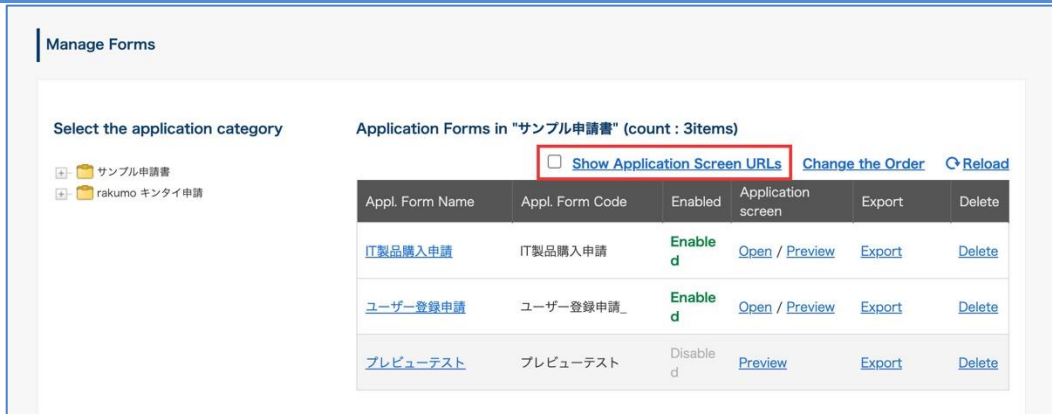
3. The URL is copied to the clipboard.

◇ Obtain from application forms list

1. Manage Forms > Select the application category > from the list of application forms, check the [Show Application Screen URLs] check box.

2. The screen display changes, and application form names and application screen URLs are displayed separated by commas.
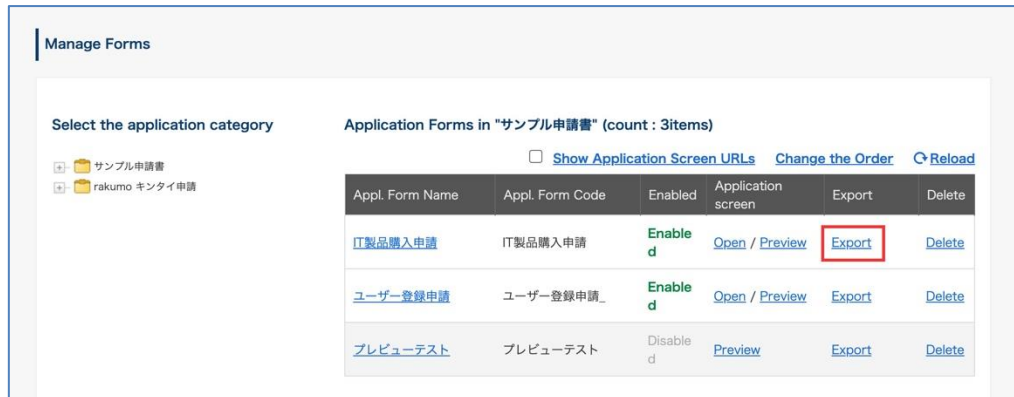
3. Select the range you want to copy and copy it to the clipboard.

6.13. Export an Application Form as a Template

There are 2 ways to export an application form as follows:

1. Manage Forms > Select the application category > on the list of application forms, click [**Export**] on the application form you wish to export

Or,

2. Manage Forms > Select the application category > from the list of application forms, click [Name] for the application form

Click [**Export**] on **Export the Form as a Template**.

6.14. Set associated application

Use associated application to associate an application form submitted in the past with an application form to be submitted.

Example use:

- Submit a "**temporary payment request**" for a business trip. Make an associated application from a "temporary payment request" to an "**expenses adjustment request**" after returning from a business trip.

- User A submits a "**work contract request**" for system support > IT system support staff gives approval. After completing the work, IT system support staff makes an associated application from a "work contract request" to a "**work completion report**" > user A gives approval

Configure the settings to associate the **preferred delivery date** for the **IT product purchase request** with the **expected start date** to use the **user registration application**.

1. Manage Forms > Select the application category > on the list of application forms, click [Name] for the application form.
   Be sure to associate the application form on the detail screen of the application form of the "takeover destination".
     Here, click Application Form Name, **User Registration Application**.

2. Click [**Set Inheritance Source Appl. Form**] at **Associate Applications**.

3. Select the application form you wish to associate.
   Here, set **IT product purchase request** as an associated application of **User Registration Application**.
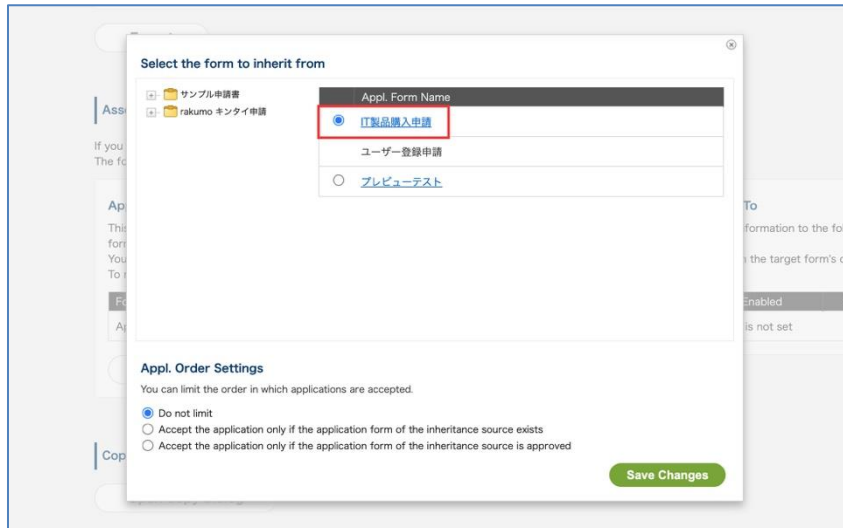
4. Set the order of applications.
    The following three types of application order can be specified.

    ・Do not limit：
    We have not set the conditions required for application. You can apply from the application details screen of the transfer source, or you can apply as a single application from the application template list.

    ・Accept the application only if the application form of the inheritance source exists：
    As a prerequisite for application, it is necessary that "the application form of the transfer source (front side) has been applied".
    If you select this setting, you will be able to apply for the transfer destination application only from the application details page of the transfer source (preceding side). Therefore, you cannot apply as a single application from the list of application templates.
    This is a speed advantage as it allows multiple application processes to run in parallel.

    ・Accept the application only if the application form of the inheritance source is approved：
    As a prerequisite for the application, it is necessary that the status of the application form of the transfer source (preceding side) is approved.
    If you select this setting, you can apply for the forwarding application from the forwarding details page only if the status of the forwarding (front) application is "Approved" or "Completed".
    In addition to not being able to apply as a single application from the list of application templates, you cannot apply even if the source (front) application is not approved.

This is recommended if you want to strictly order and manipulate your applications.

Here, proceed with the setting while leaving " **Do not limit**.".

5. Click [**Save Changes**].

6. The application form has successfully been associated.

7. Next, set the association between the items in the application form.
    The item association settings are also made from the detail screen of the "inherit to" application form, as with the application form association.
    Here, in the detailed screen of the application form for **User Registration Application**, Click **[Expected Use Start Date]** in [Item Name].

8. Check that a **Preferred Delivery Date** for the **IT product purchase request** is selected at [Associated Application's Item] and click [Save Changes].

    Under Default Value, under **[Associated Application's Item]**, select **Preferred Delivery Date** (of the **IT product purchase request** item), and then click **[Save Changes]**.

The settings have successfully been configured to associate the items in the associated application. Configure the settings in the same manner if you wish to associate other items.

You can configure the settings to associate multiple items with an application form. Also, it is also possible to associate application forms alone without associating any items (in such cases, the settings are complete at Step 3 above).

Points to note regarding associated application settings

- Multiple Application forms [Appl. Form to Inherit To] can be set to each application form. Only one Application form [Appl. Form to Inherit From] can be set to each application form. Thank you for your understanding.

- See the **table of the items and corresponding passing and receiving information of application forms for items** on the next page for which an associated application can be set.

- The mobile version screen does not support "Associate Applications", so if you limit the application order, you will not be able to apply for inheritance destination from the mobile version screen.

- When the application order is restricted and the application form of the inheritance source is "Remanded", "Rejected" or "Canceled", the application form of the inheritance destination cannot be submitted.

- When the application order is restricted, you cannot apply for a copy of inheritance destination.

- If you want to add or change the application order setting for an application that has already been associated, cancel the association and then re-associate.

- You can create multiple inherited applications from one inheritance source application.

- You cannot limit the number of applications that can be applied for as an inheritance destination from the application that is the inheritance source to one.

- If you use the setting "Accept the application only if the application form of the inheritance source exists", you can submit the application form of the inheritance destination without waiting for the approval of the application form of the inheritance source. However, the application forms of the inheritance source and the inheritance destination are processed in parallel. Therefore, depending on the progress of both applications, you are liable to encounter a situation where the inheritance destination has been approved, but the inheritance source has been remanded, rejected, or canceled.

Table of the items and corresponding passing and receiving information of application forms for items

Items for receiving information	Items for passing information
Title	Title/Text Input/Multiple Rows Text /Pulldown/Radio/Checkbox /Number Field/Calculation Result/Date
Text Input	Title/Text Input/Multiple Rows Text /Pulldown/Radio/Checkbox /Number Field/Calculation/Date
Multiple Rows Text	Title/Text Input/Multiple Rows Text /Pulldown/Radio/Checkbox /Number Field/Calculation/Date
Number Field	Number Field/Calculation
Date	Date

* Items not described in the corresponding table do not support an associated application.

[Points to note]

When the checkbox is selected, one-byte "1" is displayed in the "Inherit" item. On the contrary, one-byte "0" is displayed if the checkbox is not selected.

Avoid making any trouble about entry restrictions on items for receiving and passing information (restrictions on entry of one- and two-byte characters, maximum and minimum values). If you set Items for passing information: Text Input (Restricted: One-byte) => Items for receiving information: Text Input (Restricted: Two-byte), you cannot perform associated application with received information.

6.15. Copy an Application Form

You can copy application forms that you have created. You can also copy application routes, conditioned branches, and edit settings in approval steps together with the application form items you set.

1. Manage Forms > Select the application category > from the list of application forms, click [**Name**] for the application form

2. Click [**Open Copy Dialog**] on the **Copy Form** page.

3. The **Copy Form** dialog box opens. Select the application category to copy to.

Check the data in the **Edit application form to copy** page and click [**Done**].

* Make sure to change the code.

6.16. Change an Application Form Category

You can change the application categories in which application forms are stored.

1. Manage Forms > Select the application category > from the list of application forms, click [**Name**] for the application form

2. Click [**Open Change Dialog**] on the **Change Category of Form** page.

3. Click the target application category on the **Change category** page.

    When the confirmation pop-up is displayed and you have click [OK], changing of the application category is completed.

6.17. Reset an application number

You can reset application numbers.

*Whether common application numbers or application numbers assigned on an application form basis, you cannot restore application numbers once reset.

1. Reset a Common Application Number

Go to General Settings.

Reset common Appl. number > click **-> Reset common Application number**

The current application number and a reset application number are displayed.

After checking the details, click [**Reset Application Number**]

The common application number has successfully been reset.

2. Reset an Application Number Assigned on an Application Form Basis

Manage Forms > Select the application category > on the list of application forms, click the [**Name**] of the application form whose the application number you wish to reset

The page of the details of the application form > **The Details of the application form** > click [Edit Application Form]

Click **>> Reset Appl. Number of this form now**

The current application number and a reset application number are displayed.

After checking the details, click [**Reset Application Number**]

The common application number has successfully been reset.

7. Set an Application Route

7.1. Application route type

In rakumo workflow, you can create two types of application routes: "shared route" and "dedicated route".

Consider the type of application route to be used according to the operation method of the company.

	Shared route (*1)	Dedicated route
Overview	A route that can be used with multiple application forms. Maintenance work in case of organization change or personnel change can be performed easily. (*2)	A route can only be used with a specific application form. It can also be used for management transfer in large organizations. (*3)
Operational level	For advanced users Recommended for those who want to build firmly	Beginners Recommended for those who want to make quickly and easily
Who can create	・rakumo Admin ・Workflow Admin	・rakumo Admin ・Workflow Admin ・Operators of category（*4）
Relationship between route and application form	Separation (Used for link with the application form)	Built-in (Integrated with the application form)
Use from multiple application forms	○ Possible	× Impossible
Route settings such as "step type", "input control of items", and "branch"	○ Possible	

* 1 This is the conventional method that has existed before February 18, 2020. The name has been changed to differentiate it from the dedicated route. There are no functional changes.

* 2 Modifying one application route will affect all application forms that use that application route. Therefore, maintenance work is reduced.

* 3 For example, when Entrusting management of application routes used for application forms to

operators of categories

.* 4 In addition to creating a dedicated route, it is also possible to link a shared route.

7.2. Types of steps that can be set in the application route

In the rakumo workflow, you can set the application route by combining three types of steps: "Approval Step", "Operation Step", and "Circular Step".

You can set multiple steps for each type. You don't have to add every step. You can set up an application route with only approval steps or an application route with only circular steps.

Please set the application route according to the operation method of the company.

	Approval Step	Operation Step	Circular Step
Overview	Steps to approve the application	Steps to report that work related to an approved application has been completed	Steps to circulate the contents of the application form and related work status to related parties
Possible processing	"Approval" "Confirmation" (* 1) "Reject" "Remand"	"Done" "Confirmation" (* 1) "Remand"	"Confirmation" only
Conditions for reaching the next step	"Everyone" approves Or (* 2) "One person" approves	"One person" is done.	"Everyone" confirms
Step display position	Display at the beginning	Display after "Approval Step"	Display after "Operation Step"

* 1 Occurs only in steps where the condition for reaching the next step is "one person". If one person performed an "approve" or "work" process within a "one person" step, other "approvers" or "workers" are asked to "confirm" that another user has finished processing instead of the original process.

* 2 By selecting "Type" when creating / editing a step, you can control the conditions for reaching the next step.

If you have multiple approval steps, you can control the "type" of each step.
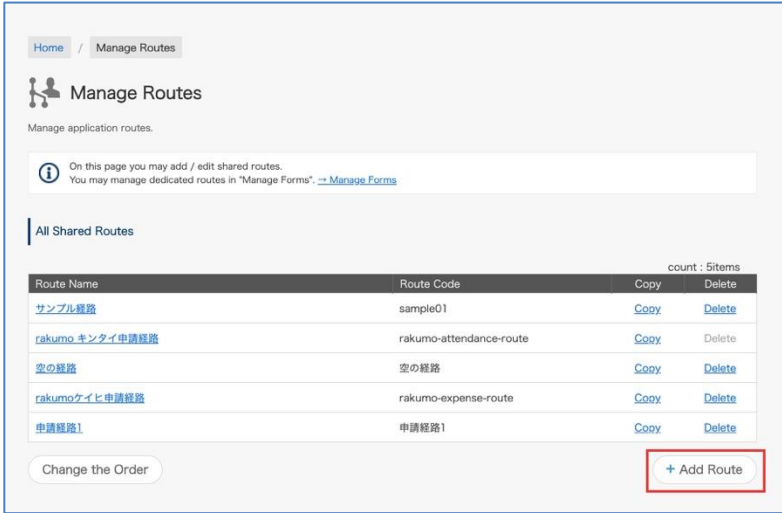
* 3 You cannot insert an "operational step" or "circular step" between multiple approval steps. Also, routes cannot be created in the order of "operation step ⇒ approval step" or "circular step ⇒ approval step".

If there are two or more steps of the same type, the application arrives at the next type of step when the processing is completed in the final step of each type. (Example: Approval step 1 → Approval step 2 → Operation Step → Circulatr step)

7.3. Create a shared route

Workflow Admin Console > Home > Manage Routes

(1) Click [**+Add Route**].

By clicking [**Change the Order**], you can change the order of the routes displayed on the **list of registered application routes** (changes made to the order of the routes displayed are reflected only on the Manage Routes page. Not reflected in the actual Workflow).

(2) Enter the required items on the **Add Application Route** page.

Home / Manage Routes / Add Application Route

Add Application Route

Add an application route.

Add Application Route :

Route Name :

Route Code :

Description :

Note for Administrators :

Back   Add Application Route

① **[Route Name]** ***Required**

Enter a name for the route (e.g. Change of address notification)

② **[Route Code]** ***Required**

Enter a character string to distinguish the application route from other application routes (e.g. for the

XX department; XX XX revision version).

③ **[Description]**

Enter a description for the route.

④ **[Notes for Administrators]**

Enter notes for administrators. (Optional)

Click [**Add Application Route**] when you have entered in all fields.

The **Application Route Details** page of the created application route is displayed.

Tips: You can access the **Application Route Details** page from the **Manage Routes** page.

When clicking a **route name** in the **list of registered application routes**, the [Application Route Details]

page is displayed.

(4) **The Application Route Details** page

    The information you registered on the (2) **Add Application Route** page is displayed in the **Summary of Appl. Route**.

   You can modify the information of the application route with the [**Edit Route**] button.

(5) Add **Approval** and **Operation** and **Circular steps**

Add the required steps to the route you created.

For the types of steps that can be created, refer to 7.2. Types of steps that can be set in the application route.

<Add Approval Step>

   [**+Add Step**] > page to **add step**

① **Route Step Setting**

[Step Name] ***Required**

[Type]

- **Approval (everyone)**

   Applications cannot go to the next step unless all the users registered with the step approve.

- **Approval (anyone)**

   Applications can go to the next step when any one of the users in the step approves. When one person approves, the other approvers in the same step are changed to reviewers, and only "confirm" processing can be performed to confirm that the application has progressed to the next step. *

   * You can skip this "confirm" process by enabling the "Skip the confirmation if approved" check box.

☐ **Allow applicants to edit the route on apply**

Selecting this, applicants can remove, change, and add approvers by clicking the [Change the route] button when applying.

□ Allow applicants to skip the route on apply

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. However, all application routes cannot be skipped. Steps are cancelled only when steps are skipped or sent back to applicants.

□ Allow approvers to edit the route on approve

Selecting this, the approver of this step can be changed when the approver of the previous step approves. To change the approver, click the [Change the route] button You can "remove", "change", and "add" approvers for this step.

□ Allow approvers to skip the route on approve

Selecting this, when one person approves in this step, the "confirmation" process of the remaining approvers is unnecessary. On the rest of the approver's screen, the request moves directly from 'Inbox - Approved' to the 'Approval - Approved' tray.

* This setting can be used only when the type "Approval(anyone)" is selected.

□ Skip the confirmation if approved

Selecting this, the approver of this step can be changed when the approver of the previous step approves. To change the approver, click the [Change the route] button You can "remove", "change", and "add" approvers for this step.

* This setting can be used only when the type "Approval(anyone)" is selected.

Superior User Settings

The following setting items are applied only when the superior user setting is enabled.

Refer to "**7.7 Setting a Superior to Be Displayed in an Application Route**" for details of the superior user setting.

□ Omit this step by the approvers' job title

When the check is turned on, select the omission behavior from the following.

□ Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant

The route of the post / charge in the same position is not omitted.

☐ Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant

The route is omitted for the job title / charge in the same position.

☐ Skip automatically when no approver found

Check On: Automatically perform skip processing when no approver found in the step.

② Approver Setting

You can select users, groups and job levels as approvers by clicking the [+] button on the [Org.], [Job Titles] and [Applicant] tabs. Check that the organization or user is displayed in the pane on the right.

<u>*** When changes have been made to Google Workspace users or in Google groups, change the approver settings after checking the current approver settings.**</u>

■ Approvers that can be selected on the [Org.] tab

- User: Corresponding users become approvers
- Group: Users directly belonging to a group become approvers. Groups on the tab are ones displayed on the rakumo Admin Console.

■ Approvers that can be selected on the [Job Titles] tab

Users belonging to a group of [Job Titles] become approvers. You can create [Job Titles] in [Manage Job Titles] on the rakumo Admin Console.

As [Job Titles] is used when setting a superior, see "7.7. Setting a Superior to Be Displayed in an Application Route".

■ Approvers that can be selected on the [Applicant] tab

- (Applicant): Users that have applied become approvers. When agents apply, their clients become approvers.
- (Members of Application department): Users (excluding the applicant) in a group selected in [Application Department] become approvers when applying. With [Application Department], an applicant who belongs to multiple departments can select an "Application Department" by selecting [Enable] from the rakumo Workflow Admin Console > [General Settings] > [Application Department].

  Meanwhile, as the priority organization of an applicant becomes an application department

when [Enable] is not selected with [Application Department], users within the priority organization of the applicant (excluding the applicant) become approvers.

- (Members of Application department and its lower departments): "Users within a group selected in [Application Department] when applying (excluding the applicant)" and "users within groups in lower layers under [Application Department]" become approvers.

   Meanwhile, when [Enable] is not selected with [Application Department], "users within the priority organization of an applicant (excluding approvers)" and "users within groups in lower layers under the priority organization of the applicant" become approvers.

③ Add Step

Click [+Add Step]. As the [Add Route Step] page is displayed again when you select [Continue adding item] and click [+Add Step], you can register the next step.

Check that an approval step has successfully been added.

<u>* You can also add an empty step without any approvers. To create an empty step, make sure to select</u> <u>either</u> **[Allow applicants to edit the route on apply]** <u>or</u> **[Allow approvers to edit the route on approve]**<u>. Unless either is selected, users cannot apply. Also, when setting an empty step as the first application route, make sure to select</u> **[Allow applicants to edit the route on apply]**<u>.</u>

<Add Operation Step>

[**+Add Step**] > page to **add step**

① **Route Step Setting**

[Step Name] *Required

[Type] Operation

☐ **Allow applicants to edit the route on apply**

Selecting this, applicants can remove, change, and add operators by clicking the [Change the route] button when applying.

☐ **Allow applicants to skip the route on apply**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. However, all application routes cannot be skipped. Steps are cancelled only when steps are skipped or sent back to applicants.

☐ **Allow approvers to edit the route on approve**

Selecting this, the operator of this step can be changed when the approver of the previous step approves or when the operator of the previous step is done. To change the operator, click the [Change the route] button You can "remove", "change", and "add" operator for this step.

☐ **Allow approvers to skip the route on approve**

Selecting this, this step can be skipped when the approver of the previous step approves or when the operator of the previous step is done..

To skip this step, click the [Change the route] button and click the [Skip this step] button.

If skipped, the skip will be canceled only when it is returned to the applicant.

☐ **Skip the confirmation if approved**

Selecting this, when one person operators in this step, the "confirmation" process of the remaining operators is unnecessary. On the rest of the operator's screen, the request moves directly from 'Inbox - Approved' to the 'Approval - Approved' tray.

* This setting can be used only when the type "Operation(anyone)" is selected.

Superior User Settings

The following setting items are applied only when the superior user setting is enabled.

Refer to "**7.7 Setting a Superior to Be Displayed in an Application Route**" for details of the superior user setting.

☐ **Omit this step by the approvers' job title**

When the check is turned on, select the omission behavior from the following.

☐ **Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**

The route of the post / charge in the same position is not omitted.

□ **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**

The route is omitted for the job title / charge in the same position.

□ **Skip automatically when no approver found**

Check On: Automatically perform skip processing when no approver found in the step.

② **Approver Setting**

You can select users, groups and job levels as approvers by clicking the [+] button on the [Org.], [Job Titles] and [Applicant] tabs. Check that the organization or user is displayed in the pane on the right.

* When changes have been made to Google Workspace users or in Google groups, change the approver settings after checking the current approver settings.

■ Operators that can be selected on the [Org.] tab

• User: Corresponding users become operators

• Group: Users directly belonging to a group become operators. Groups on the tab are ones displayed on the rakumo Admin Console.

■ Operators that can be selected on the [Job Titles] tab

Users belonging to a group of [Job Titles] become operators. You can create [Job Titles] in [Manage Job Titles] on the rakumo Admin Console.

As [Job Titles] is used when setting a superior, see "7.7. Setting a Superior to Be Displayed in an Application Route".

■ Operators that can be selected on the [Applicant] tab

• (Applicant): Users that have applied become operators. When agents apply, their clients become operators.

• (Members of Application department): Users (excluding the applicant) in a group selected in [Application Department] become operators when applying. With [Application Department], an applicant who belongs to multiple departments can select an "Application Department" by selecting [Enable] from the rakumo Workflow Admin Console > [General Settings] > [Application Department].

Meanwhile, as the priority organization of an applicant becomes an application department when [Enable] is not selected with [Application Department], users within the priority organization of the applicant (excluding the applicant) become operators.

- • (Members of Application department and its lower departments): "Users within a group selected in [Application Department] when applying (excluding the applicant)" and "users within groups in lower layers under [Application Department]" become operators.

  Meanwhile, when [Enable] is not selected with [Application Department], "users within the priority organization of an applicant (excluding approvers)" and "users within groups in lower layers under the priority organization of the applicant" become operators.

③ **Add Step**

Click [+Add Step]. As the [Add Route Step] page is displayed again when you select [Continue adding item] and click [+Add Step], you can register the next step.

Check that an operation step has successfully been added.

* You can also add an empty step without any operators. To create an empty step, make sure to select either **[Allow applicants to edit the route on apply]** or **[Allow approvers to edit the route on approve]**. Unless either is selected, users cannot apply. Also, when setting an empty step as the first application route, make sure to select **[Allow applicants to edit the route on apply]**.

<Add Circular Step>

[**+Add Step**] > page to **Add Step**

① **Route Step Setting**

[Step Name] *Required

[Type] Circulation

□ **Allow applicants to edit the route on apply**

Selecting this, applicants can remove, change, and add circulators.

□ **Allow applicants to skip the route on apply**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. However, all application routes cannot be skipped. Steps are cancelled only when steps are skipped or sent back to applicants.

□ **Allow approvers to edit the route on approve**

Selecting this, the circulator of this step can be changed when the approver of the previous step approves or when the operator of the previous step is done. To change the circulator, click the [Change the route] button You can "remove", "change", and "add" circulator for this step.

□ **Allow approvers to skip the route on approve**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. Steps are cancelled only when steps are skipped or sent back to applicants.

Superior User Settings

The following setting items are applied only when the superior user setting is enabled.

Refer to "**7.7 Setting a Superior to Be Displayed in an Application Route**" for details of the superior user setting.

□ **Omit this step by the approvers' job title**

When the check is turned on, select the omission behavior from the following.

□ **Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**

The route of the post / charge in the same position is not omitted.

□ **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**

The route is omitted for the job title / charge in the same position.

□ **Skip automatically when no approver found**

Check On: Automatically perform skip processing when no approver found in the step.

② **Approver Setting**

After clicking the [+] button to the right of an organization or user, check that the organization or user is displayed in the pane on the right.

* When changes have been made to Google Workspace users or in Google groups, change the approver/reviewer settings after checking the current approver/reviewer settings.

■ Reviewers that can be selected on the [Org.] tab

- User: Corresponding users become reviewers

- Group: Users directly belonging to a group become reviewers. Groups on the tab are ones displayed on the rakumo Admin Console.

■ Reviewers that can be selected on the [Job Title] tab

Users belonging to a group of [Job Title] become approvers. You can create [Job Title] in [Manage Job Titles] on the rakumo Admin Console.

As [Job Title] is used when setting a superior, see "7.7. Setting a Superior to Be Displayed in an Application Route".

■ Reviewers that can be selected on the [Applicant, Application Department] tab

- (Applicant): Users that have applied become reviewers. When agents apply, their clients become reviewers.

- (Members of Application department): Users (excluding the applicant) in a group selected in [Application Departments] become reviewers when applying. With [Application Department], an applicant who belongs to multiple departments can select an "Application Department" by selecting [Enable] from the rakumo Workflow Admin Console > [General Settings] > [Application Department].

  Meanwhile, as the priority organization of an applicant becomes an application department when [Enable] is not selected with [Application Department], users within the priority organization of the applicant (excluding the applicant) become reviewers.

- (Members of Application department and its lower departments):"Users within a group selected in [Application Departments] when applying (excluding the applicant)" and "users within groups in lower layers under [Application Departments]" become reviewers.

  Meanwhile, when [Enable] is not selected with [Select application department when applying], "users within the priority organization of an applicant (excluding approvers)" and "users within

groups in lower layers under the priority organization of the applicant" become reviewers.
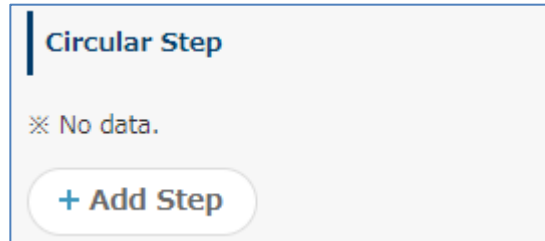
③ Add Step

Click [+ Add Step]. As the [Add Route Step] page is displayed again when you select [Continue adding item] and click [+Add Step], you can register the next step.

Check that a Circular step has successfully been added. Creating a shared route is complete.

The shared route is used in connection with the application form.

Refer to "**6.5 Setting a shared route in the application form.**" for the method of linking to the application form.

7.4. Delete, copy shared routes

When copying an shared route, click ［Copy］.

When deleting an shared route, click ［Delete］.

The attention when deleting ・・・When deleting an application route is set as an application form, the application form will be "Disabled" (The user can't use this application form.). After replacing an another application route with an application form, please delete an application route.

7.5. Check the application form that uses the shared route

You can check which application form the shared route is used in.

Before you edit the shared route, you can identify the affected application forms.

(1) Workflow Admin Console > Home > Manage Forms

Access the details screen of the shared route for which you want to check the application form used.

(2) Details of the application route > Click "Check the Target Forms" of **Application Forms using this Route**.
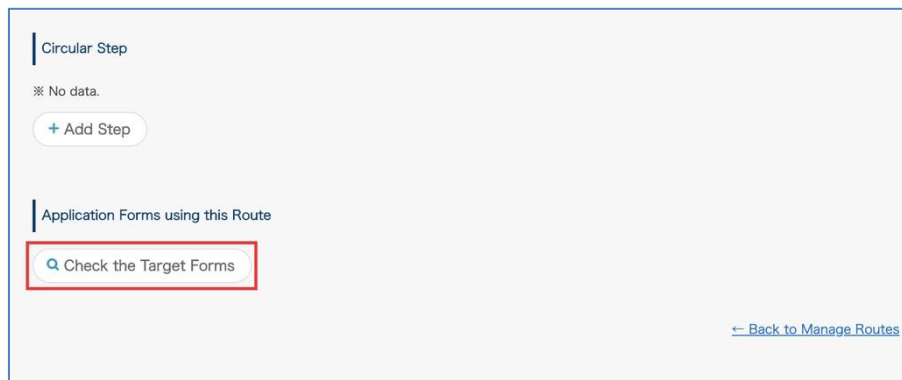
(3) A list of application forms that use this shared route will be displayed.
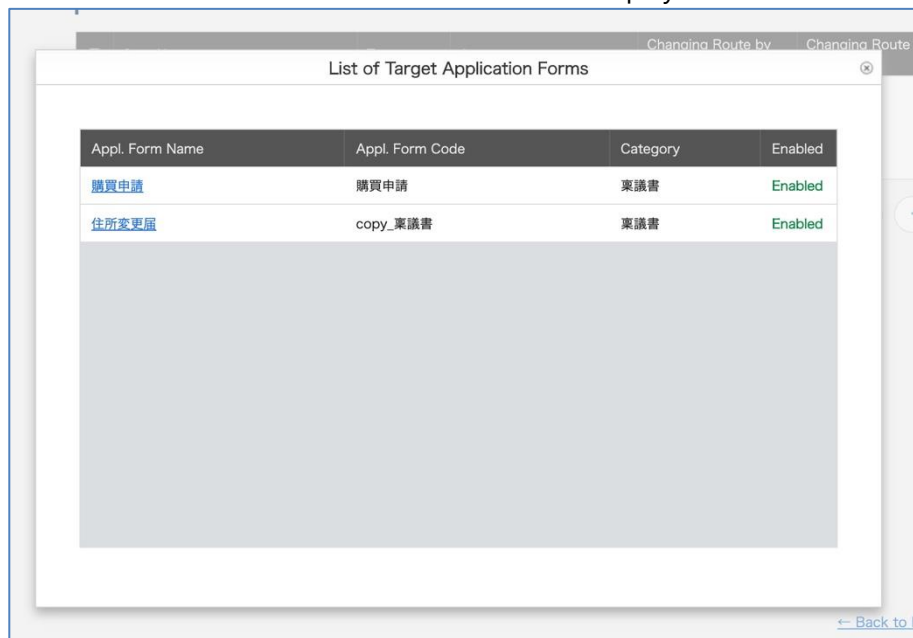
Click on the application model name to move to the application form details screen.

7.6. Create a dedicated route

Workflow Admin Console > Home > Manage Forms

Access the detail screen of the application form to create a dedicated route.

(1) Click [**Create Dedicated Route**] of "Details for Appl. Route".
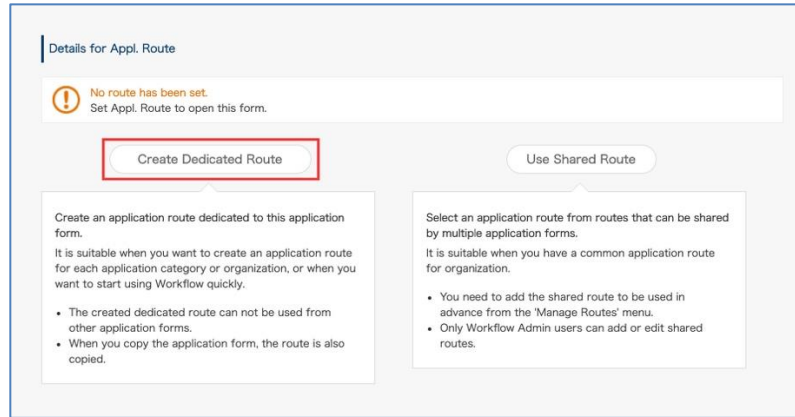
* If you create a dedicated route for an application template for which a route has already been set, you need to reset the application route. Refer to "**6.6 Reset the Application Route**" for details.

(2) On the screen for creating a dedicated route, add **approval steps** and **Operation step** and **circulation steps**.

For the types of steps that can be created, refer to **"7.2. Types of steps that can be set in the application route".**
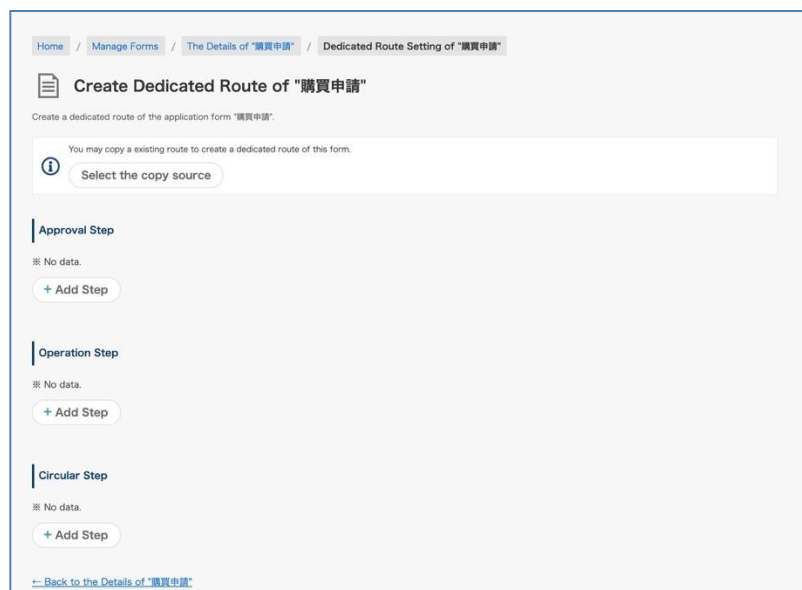
In addition to creating a new route, you can also create a route based on a duplicate of an existing route.

For details, refer to <Copy from existing route> on page 146.

<Add Approval Step>

[**+Add Step**] > page to **add step**

① **Route Step Setting**

[Step Name] ***Required**

[Type]

- **Approval (everyone)**

    Applications cannot go to the next step unless all the users registered with the step approve.

- **Approval (anyone)**

    Applications can go to the next step when any one of the users in the step approves. When one user approves, the status of the other approvers changes to reviewers.

□ **Allow applicants to edit the route on apply**

    Selecting this, applicants can remove, change, and add approvers by clicking the [Change the

route] button when applying.

□ **Allow applicants to skip the route on apply**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. However, all application routes cannot be skipped. Steps are cancelled only when steps are skipped or sent back to applicants.

□ **Allow approvers to edit the route on approve**

Selecting this, the approvers of this step can be changed when the approver of the previous step approves. To change the approver, click the [Change the route] button. You can "remove", "change", and "add" approvers for this step.

□ **Allow approvers to skip the route on approve**

Selecting this, Approvers can remove or change approvers in the subsequent steps by clicking the [Change the route] button when applying. Steps are cancelled only when steps are skipped or sent back to applicants.

□ **Skip the confirmation if approved**

Selecting this, when one person approvers in this step, the "confirmation" process of the remaining approvers is unnecessary. On the rest of the approver's screen, the request moves directly from 'Inbox - Approved' to the 'Approval - Approved' tray.

* This setting can be used only when the type "Approval(anyone)" is selected.

Superior User Settings

The following setting items are applied only when the superior user setting is enabled.

Refer to "**7.7 Setting a Superior to Be Displayed in an Application Route**" for details of the superior user setting.

□ **Omit this step by the approvers' job title**

When the check is turned on, select the omission behavior from the following.

□ **Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**

The route of the post / charge in the same position is not omitted.

□ **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**

The route is omitted for the job title / charge in the same position.

□ **Skip automatically when no approver found**

Check On: Automatically perform skip processing when no approver found in the step.

② **Approver Setting**

You can select users, groups and job levels as approvers by clicking the [+] button on the [Org.], [Job Titles] and [Applicant] tabs. Check that the organization or user is displayed in the pane on the right.

* When changes have been made to Google Workspace users or in Google groups, change the approver settings after checking the current approver settings.

■ Approvers that can be selected on the [Org.] tab

• User: Corresponding users become approvers

• Group: Users directly belonging to a group become approvers. Groups on the tab are ones displayed on the rakumo Admin Console.

■ Approvers that can be selected on the [Job Titles] tab

Users belonging to a group of [Job Titles] become approvers. You can create [Job Titles] in [Manage Job Titles] on the rakumo Admin Console.

As [Job Titles] is used when setting a superior, see "5.3. Setting a Superior to Be Displayed in an Application Route".

■ Approvers that can be selected on the [Applicant] tab

• (Applicant): Users that have applied become approvers. When agents apply, their clients become approvers.

• (Members of Application department): Users (excluding the applicant) in a group selected in [Application Department] become approvers when applying. With [Application Department], an applicant who belongs to multiple departments can select an "Application Department" by selecting [Enable] from the rakumo Workflow Admin Console > [General Settings] > [Application Department].

Meanwhile, as the priority organization of an applicant becomes an application department when [Enable] is not selected with [Application Department], users within the priority organization of the applicant (excluding the applicant) become approvers.

• (Members of Application department and its lower departments): "Users within a group selected

in [Application Department] when applying (excluding the applicant)" and "users within groups in lower layers under [Application Department]" become approvers.

Meanwhile, when [Enable] is not selected with [Application Department], "users within the priority organization of an applicant (excluding approvers)" and "users within groups in lower layers under the priority organization of the applicant" become approvers.

③ **Add Step**

Click [+Add Step]. As the [Add Route Step] page is displayed again when you select [Continue adding item] and click [+Add Step], you can register the next step.

Check that an approval step has successfully been added.

* You can also add an empty step without any approvers. To create an empty step, make sure to select either **[Allow applicants to edit the route on apply]** or **[Allow approvers to edit the route on approve]**. Unless either is selected, users cannot apply. Also, when setting an empty step as the first application route, make sure to select **[Allow applicants to edit the route on apply]**.

<Add Operation Step>

[**+Add Step**] > page to **add step**

① **Route Step Setting**

[Step Name] ***Required**

[Type] Operation

□ **Allow applicants to edit the route on apply**

Selecting this, applicants can remove, change, and add operators by clicking the [Change the route] button when applying.

□ **Allow applicants to skip the route on apply**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. However, all application routes cannot be skipped. Steps are cancelled only when steps are skipped or sent back to applicants.

□ **Allow approvers to edit the route on approve**

Selecting this, the operator of this step can be changed when the approver of the previous step approves or when the operator of the previous step is done. To change the operator, click the [Change the route] button You can "remove", "change", and "add" operator for this step.

□ **Allow approvers to skip the route on approve**

Selecting this, this step can be skipped when the approver of the previous step approves or when the operator of the previous step is done..

To skip this step, click the [Change the route] button and click the [Skip this step] button.

If skipped, the skip will be canceled only when it is returned to the applicant.

□ **Skip the confirmation if approved**

Selecting this, when one person operators in this step, the "confirmation" process of the remaining operators is unnecessary. On the rest of the operator's screen, the request moves directly from 'Inbox - Approved' to the 'Approval - Approved' tray.

* This setting can be used only when the type "Operation(anyone)" is selected.

Superior User Settings

The following setting items are applied only when the superior user setting is enabled.

Refer to "**7.7 Setting a Superior to Be Displayed in an Application Route**" for details of the superior user setting.

□ **Omit this step by the approvers' job title**

When the check is turned on, select the omission behavior from the following.

□ **Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**

The route of the post / charge in the same position is not omitted.

□ **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**

The route is omitted for the job title / charge in the same position.

□ **Skip automatically when no approver found**

Check On: Automatically perform skip processing when no approver found in the step.

② **Approver Setting**

You can select users, groups and job levels as approvers by clicking the [+] button on the [Org.], [Job Titles] and [Applicant] tabs. Check that the organization or user is displayed in the pane on the right.

* When changes have been made to Google Workspace users or in Google groups, change the approver settings after checking the current approver settings.

■ Operators that can be selected on the [Org.] tab

- User: Corresponding users become operators
- Group: Users directly belonging to a group become operators. Groups on the tab are ones displayed on the rakumo Admin Console.

■ Operators that can be selected on the [Job Titles] tab

Users belonging to a group of [Job Titles] become operators. You can create [Job Titles] in [Manage Job Titles] on the rakumo Admin Console.

As [Job Titles] is used when setting a superior, see "7.7. Setting a Superior to Be Displayed in an Application Route".

■ Operators that can be selected on the [Applicant] tab

- (Applicant): Users that have applied become operators. When agents apply, their clients become operators.
- (Members of Application department): Users (excluding the applicant) in a group selected in [Application Department] become operators when applying. With [Application Department], an applicant who belongs to multiple departments can select an "Application Department" by selecting [Enable] from the rakumo Workflow Admin Console > [General Settings] > [Application Department].

Meanwhile, as the priority organization of an applicant becomes an application department when [Enable] is not selected with [Application Department], users within the priority organization of the applicant (excluding the applicant) become operators.

- (Members of Application department and its lower departments): "Users within a group selected

in [Application Department] when applying (excluding the applicant)" and "users within groups in lower layers under [Application Department]" become operators.

Meanwhile, when [Enable] is not selected with [Application Department], "users within the priority organization of an applicant (excluding approvers)" and "users within groups in lower layers under the priority organization of the applicant" become operators.
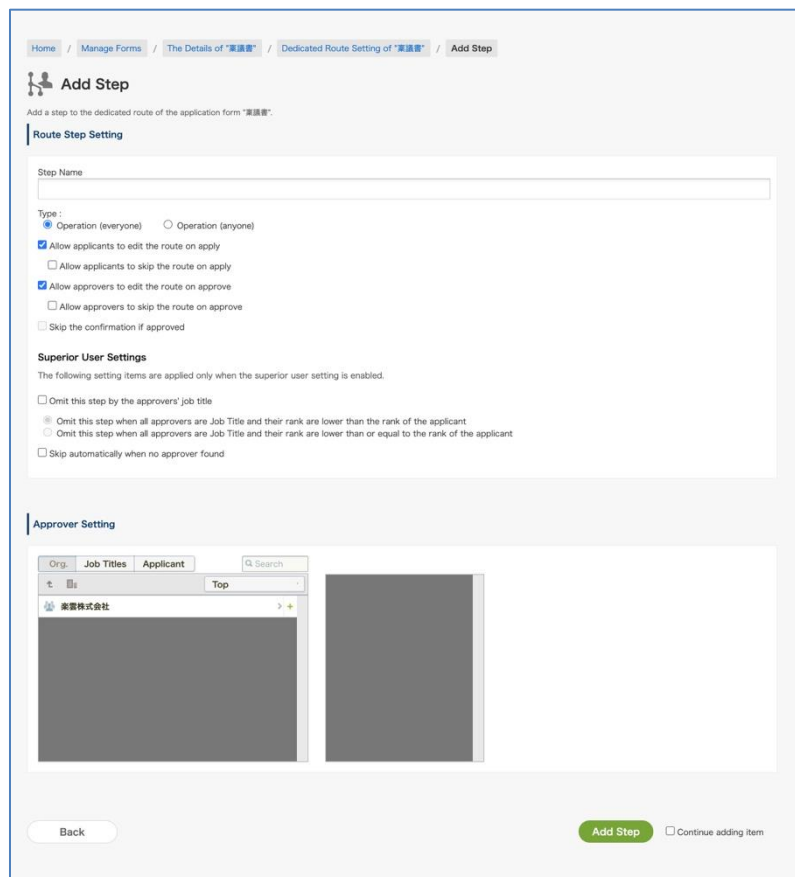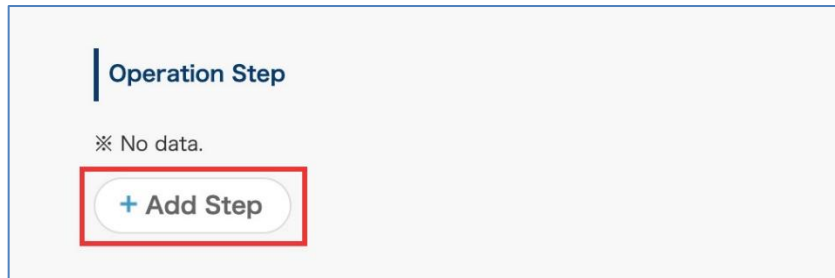
③ **Add Step**

Click [+Add Step]. As the [Add Route Step] page is displayed again when you select [Continue adding item] and click [+Add Step], you can register the next step.

Check that an operation step has successfully been added.

* You can also add an empty step without any operators. To create an empty step, make sure to select either **[Allow applicants to edit the route on apply]** or **[Allow approvers to edit the route on approve]**. Unless either is selected, users cannot apply. Also, when setting an empty step as the first application route, make sure to select **[Allow applicants to edit the route on apply]**.

<Add Circular Step>

[**+Add Step**] > page to **Add Step**

① **Route Step Setting**

[Step Name] ***Required**

[Type] Circulation

□ **Allow applicants to edit the route on apply**

Selecting this, applicants can remove, change, and add approvers.

□ **Allow applicants to skip the route on apply**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. However, all application routes cannot be skipped. Steps are cancelled only when steps are skipped or sent back to applicants.

□ **Allow approvers to edit the route on approve**

Selecting this, approvers can remove, change, and add approvers in the subsequent steps.

□ **Allow approvers to skip the route on approve**

Selecting this, applicants can skip steps by clicking the [Change the route] button when applying. Steps are cancelled only when steps are skipped or sent back to applicants.

Superior User Settings

The following setting items are applied only when the superior user setting is enabled.

Refer to "**7.6 Setting a Superior to Be Displayed in an Application Route**" for details of the superior user setting.

□ **Omit this step by the approvers' job title**

When the check is turned on, select the omission behavior from the following.

□ **Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**

The route of the post / charge in the same position is not omitted.

□ **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**

The route is omitted for the job title / charge in the same position.

□ **Skip automatically when no approver found**

Check On: Automatically perform skip processing when no approver found in the step.

② **Approver Setting**

After clicking the [+] button to the right of an organization or user, check that the organization or user

is displayed in the pane on the right.

* When changes have been made to Google Workspace users or in Google groups, change the approver/reviewer settings after checking the current approver/reviewer settings.

■ Reviewers that can be selected on the [Org.] tab

- User: Corresponding users become reviewers

- Group: Users directly belonging to a group become reviewers. Groups on the tab are ones displayed on the rakumo Admin Console.

■ Reviewers that can be selected on the [Job Title] tab

Users belonging to a group of [Job Title] become approvers. You can create [Job Title] in [Manage Job Titles] on the rakumo Admin Console.

As [Job Title] is used when setting a superior, see "5.3. Setting a Superior to Be Displayed in an Application Route".

■ Reviewers that can be selected on the [Applicant, Application Department] tab

- (Applicant): Users that have applied become reviewers. When agents apply, their clients become reviewers.

- (Members of Application department): Users (excluding the applicant) in a group selected in [Application Departments] become reviewers when applying. With [Application Department], an applicant who belongs to multiple departments can select an "Application Department" by selecting [Enable] from the rakumo Workflow Admin Console > [General Settings] > [Application Department].

  Meanwhile, as the priority organization of an applicant becomes an application department when [Enable] is not selected with [Application Department], users within the priority organization of the applicant (excluding the applicant) become reviewers.

- (Members of Application department and its lower departments):"Users within a group selected in [Application Departments] when applying (excluding the applicant)" and "users within groups in lower layers under [Application Departments]" become reviewers.

  Meanwhile, when [Enable] is not selected with [Select application department when applying], "users within the priority organization of an applicant (excluding approvers)" and "users within groups in lower layers under the priority organization of the applicant" become reviewers.
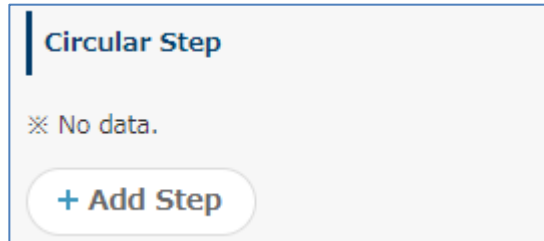
③ **Add Step**

Click [+ Add Step]. As the [Add Route Step] page is displayed again when you select [Continue adding item] and click [+Add Step], you can register the next step.

Check that a Circular step has successfully been added. Creating a dedicated route is complete.

<Copy from existing route>

If there is one or more existing shared routes or dedicated routes, you can create a dedicated route based on the existing routes.

To create a dedicated route by copying an existing route, follow the procedure below.

● Operating procedure

1. Click "Select the copy source".
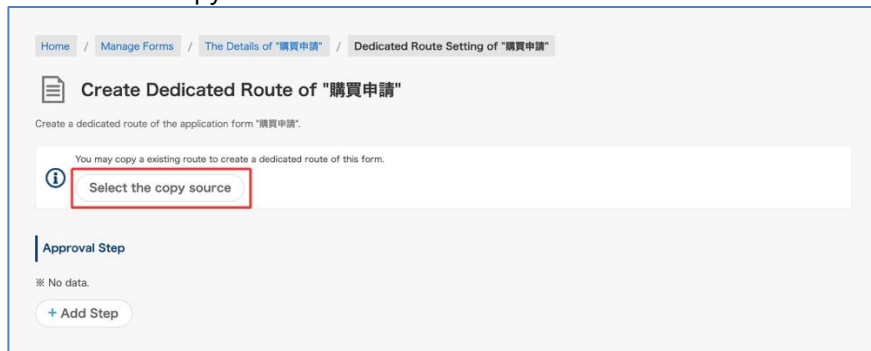
2. Select the copy source.

・For "Copy from shared route":

Select one registered shared route.

・For "Copy from application forms":

Click [Copy from application forms], select an application category, and then application form.
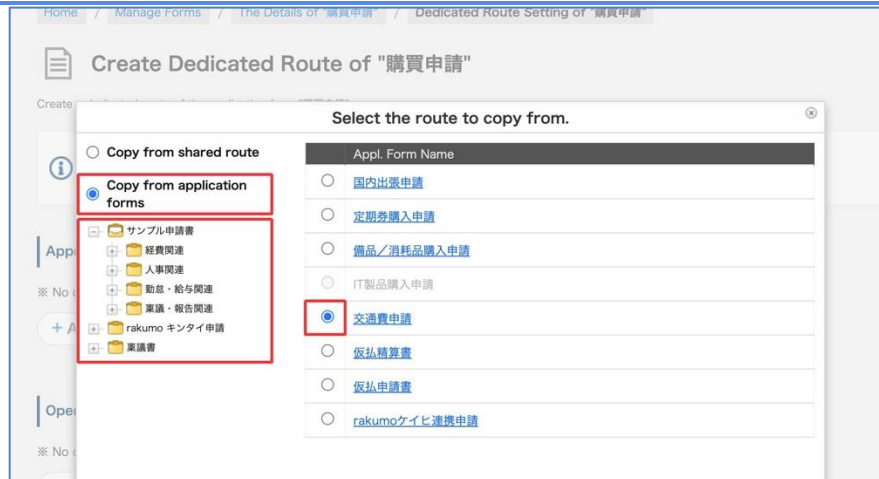
3.   Click "Save Changes".

4.   A dedicated route will be created based on the selected route.

5. If you want to make additional changes, add / edit / delete steps. (Optional)

● Reference information

・If you select "Copy from application forms", you can copy the route linked to another application form. When copying, it doesn't matter what type of route is linked. You can copy the step contents of the route regardless of whether the shared route or the dedicated route is linked.

・When "Copy from application forms" is selected and the application form linked to the shared route is selected, the copy operation is the same as when the same shared route is selected in "Copy from shared route".

・The range of application forms that can be selected when "Copy from application forms" is selected is the same as the range that can be operated with the administrator privileges of the operating user. (Example: The operator in the "Expense settlement related" category can select only the application template in the "Expense settlement related" category as the copy source. Templates in other application categories cannot be selected.)

・After copying an existing route to create a dedicated route, the original route and the dedicated route created by copying exist independently and do not interfere with each other. (Example: Even if the original route is changed, the changed contents are not reflected in the dedicated route created by copying. Even if the dedicated route created by copying is changed, the changed contents are not reflected in the original route.)

・After copying an existing route to create a dedicated route, if you want to change both the original route and the dedicated route created by copying, you need to edit and change each route.

7.7. Setting a Superior to Be Displayed in an Application Route

7.7.1 Outline of Superior Display

In the rakumo Workflow, applicants can display only their "superiors" as approvers when submitting an application.

For instance, when a user in the Sales department section2 submits an application for "fixtures purchase," only the user's "superiors" in the Sales Department section2 are automatically displayed as approvers. When a user in the General Affairs Department section2 submits an application for "fixtures purchase," only the user's "superiors" in the General Affairs department section2 are automatically displayed as approvers.
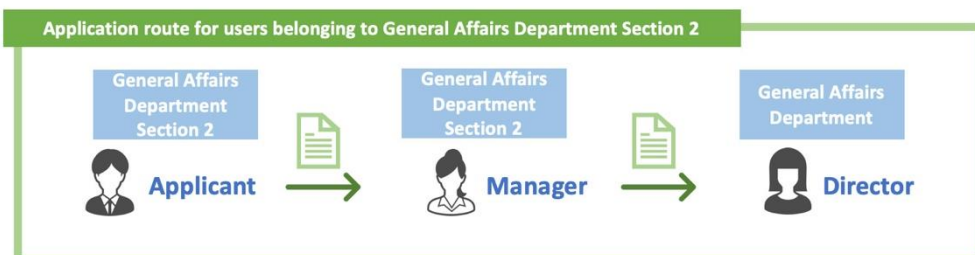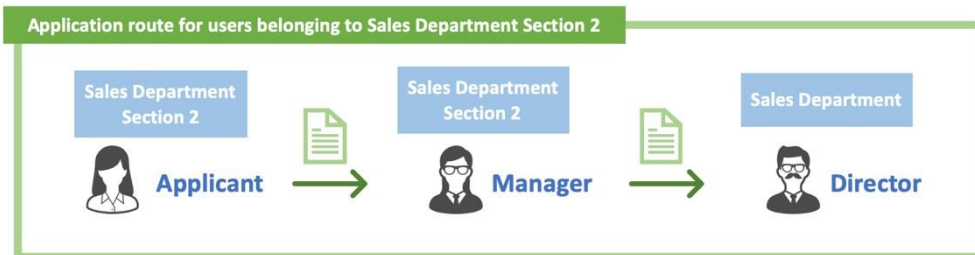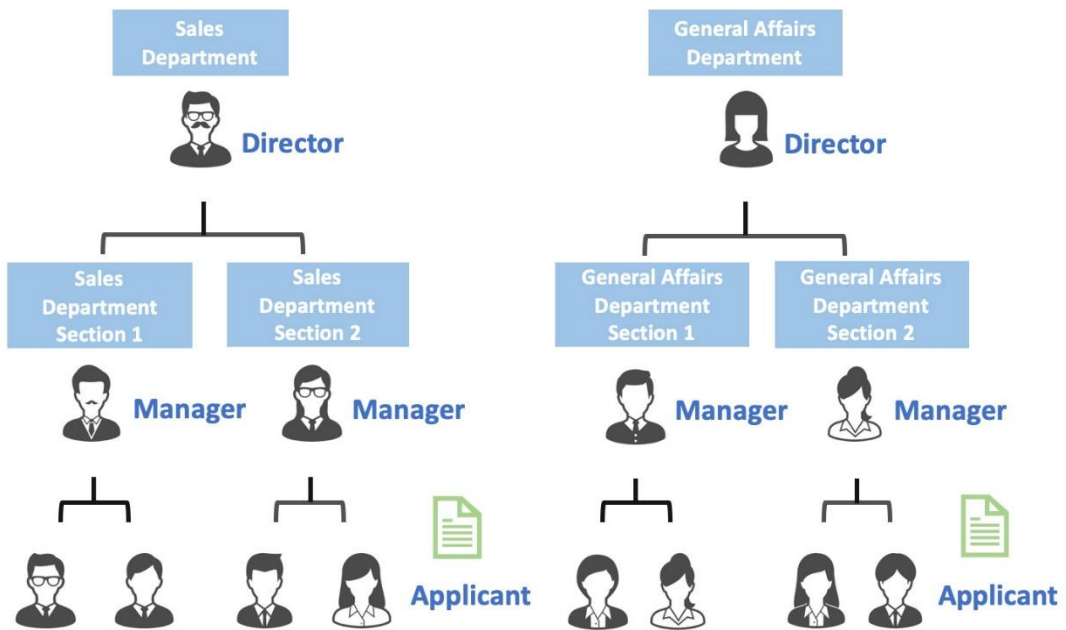
Mechanism of superior judgment

Starting from the applicant's application department, while tracing the organizational hierarchy (organization chart) to a higher hierarchy, search for a user who has been assigned a job title. When the match is found, the search ends and the match is displayed as the approver.

* Organizational hierarchies that exist in parallel are not subject to search.
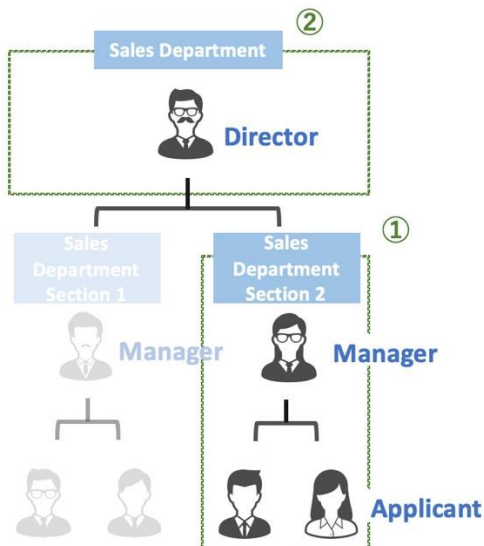
Setting information used for superior judgment

The following information is used in the judgment to display the superior in the application route.

(1) **Google group**: Refers to the organization hierarchy (organization chart) and who is the user belonging to the organization.

(2) **Job title group**: Determine who is which job title on the organizational hierarchy. (Created on rakumo)

(3) **Application route step**: Controls which position and range of users are displayed in the route step.

(4) **"Application department" information on the application form**: If you belong to multiple organizations, determine whether to make a superior judgment starting from the organizational hierarchy.

    * If there is no "Application Department" item in the application template, the organization to which the applicant belongs, which is set as the priority organization, will be treated as the application department. For details, please refer to 7.7.6 Superior's Decision Where the Applicant is a Member of Multiple Google Groups.

Basic Operation of the Superior Display Feature 1.

When the applicant and the applicant's superior are in the same Google group
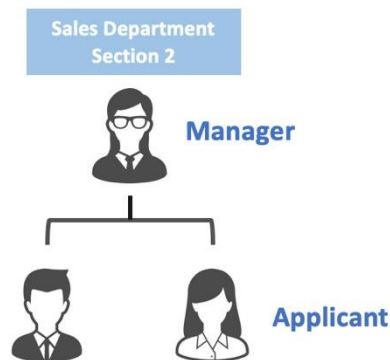
Prerequisite settings for Basic Operation of the Superior Display Feature 1.

■ Google Group settings

Create a "Sales Department Section 2" group in the Google group and add the users of Sales Department Section 2 as members.
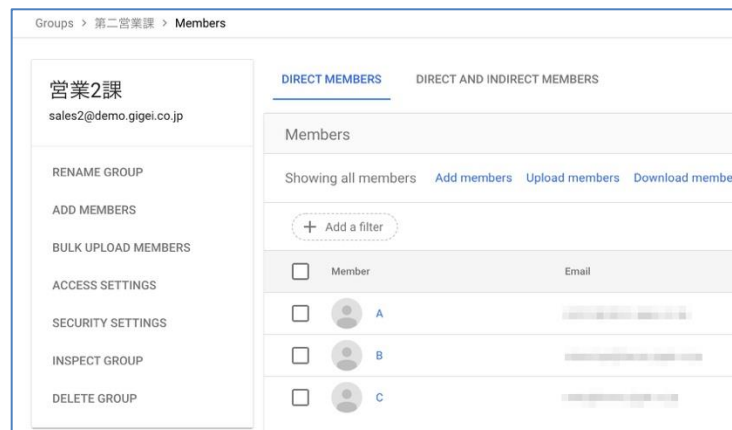
■ Job title settings

Create a job title group "Manager" on the rakumo Admin Console and assign a section Manager user for each section.

■ Setting of application route steps

On the rakumo Workflow Admin Console, specify the approver of the step of the application route as ""
Manager "and One Nearest Superior User".
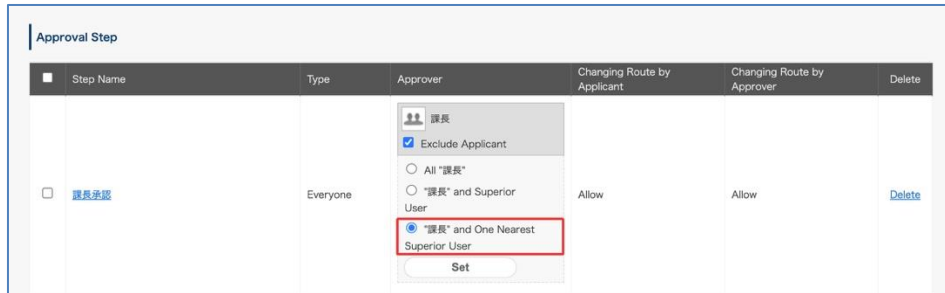
Route judgment behavior at the time of application

When User C of "Sales Department Section 2" raises an application, rakumo's system searches for the user assigned the position group "Manager" from the same "Sales Department Section 2" as User C, and finds User A.
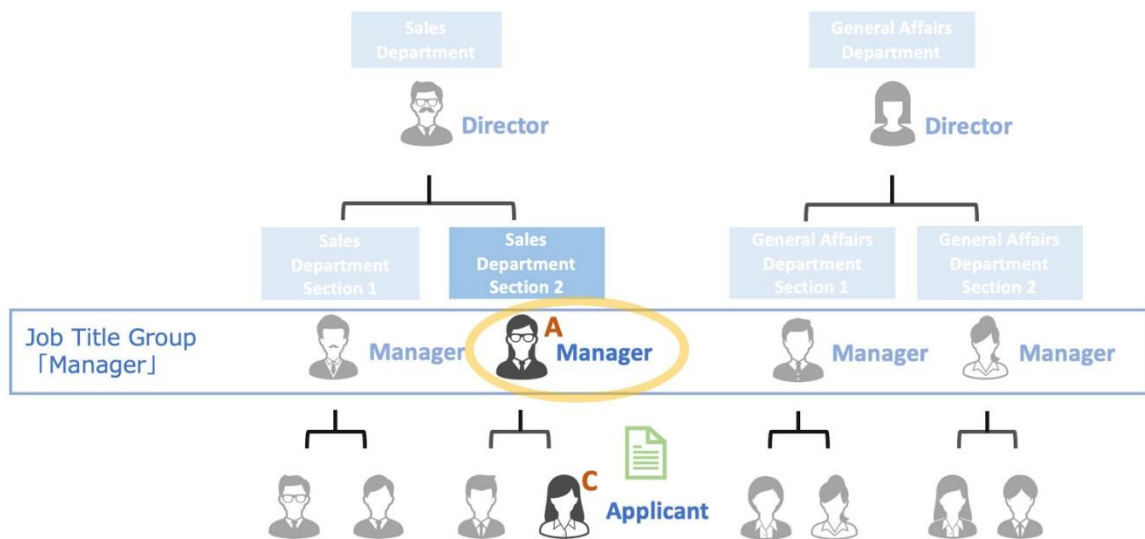
When User C of "Sales Department Section 2" raises an application, rakumo's system searches for the user assigned the position group "Manager" from the same "Sales Department Section 2" as User C, and finds User A.
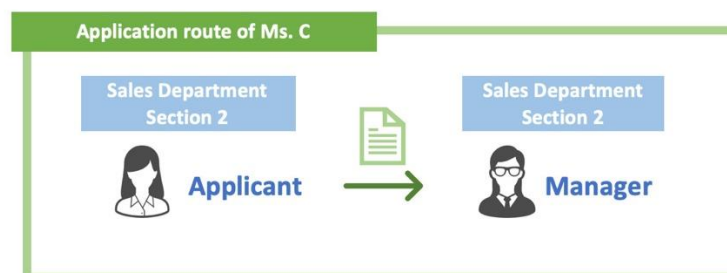
Basic Operation of the Superior Display Feature 2.

When the Google group of which the applicant is a member and the group of which the user's superior is a member are not on the same level.
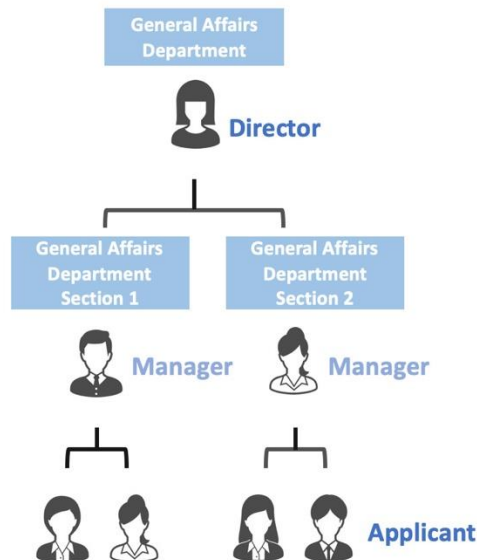
Prerequisite settings for Basic Operation of the Superior Display Feature 2.

■ Google Group settings

Create groups "General Affairs Department Section 1" and "General Affairs Department Section 2", and register the section managers and members of each section as members.

After that, create a "General Affairs Department" in the Google group, and add the manager user and the groups "General Affairs Department Section 1" and "General Affairs Department Section 2" as members.
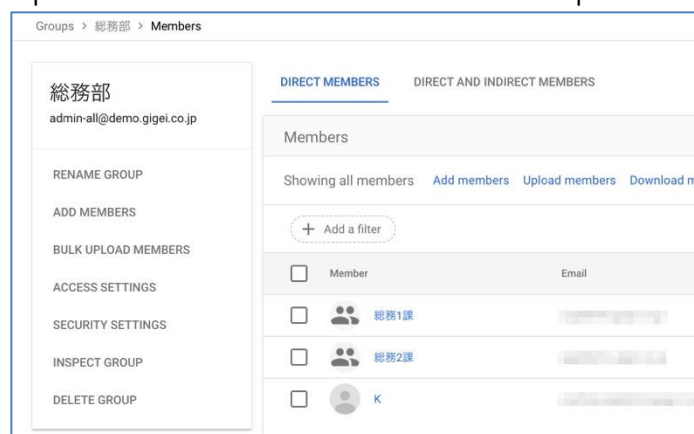
■ Job title settings

Create a job title group "Director" on the rakumo Admin Console and assign a section Manager user for each section.

■ Setting of application route steps

On the rakumo Workflow Admin Console, specify the approver of the step of the application route as ""

Director "and One Nearest Superior User".

Route judgment behavior at the time of application

When User J of "General Affairs Department Section 2" submits an application, rakumo's system searches for a user who is assigned the job title group "Director" from within the same "General Affairs Department Section 2" as User J. (① below)

Since the corresponding user cannot be found, search for the user to whom the job title group "Director" is assigned in the upper hierarchy group "General Affairs Department", and find user K. (② below)
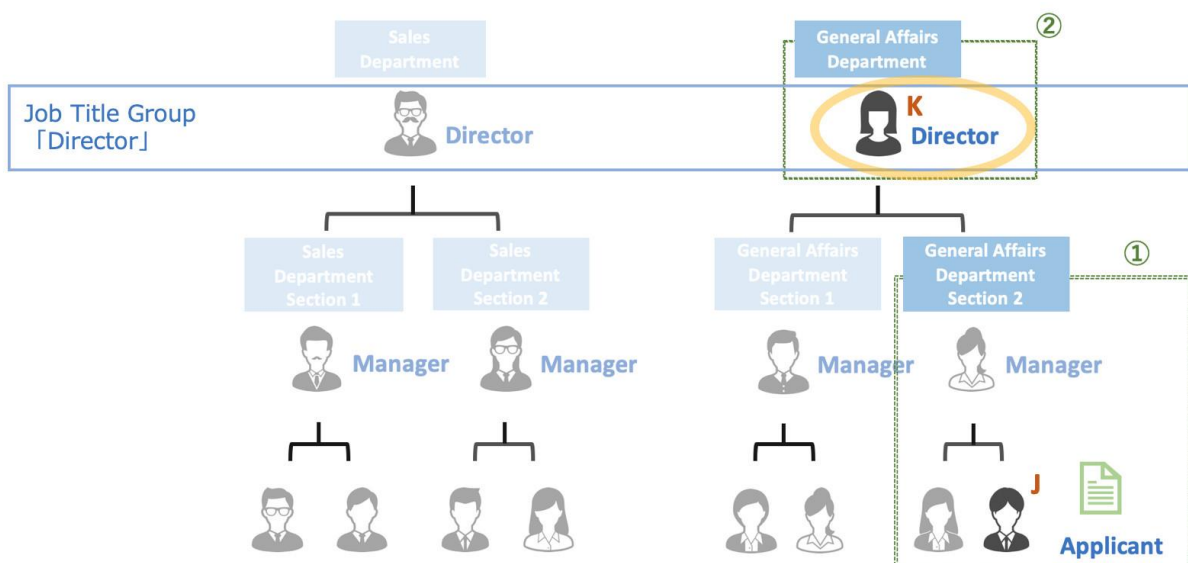
* The target to be searched is only the groups existing in the upper hierarchy. Groups that exist in parallel

with groups that include applicants, such as General Affairs Department Section 1, and groups under the Sales Department that exist as separate levels are not eligible.

As a result of the judgment, only user K from the manager group is automatically displayed as an approver in the application route of user J.
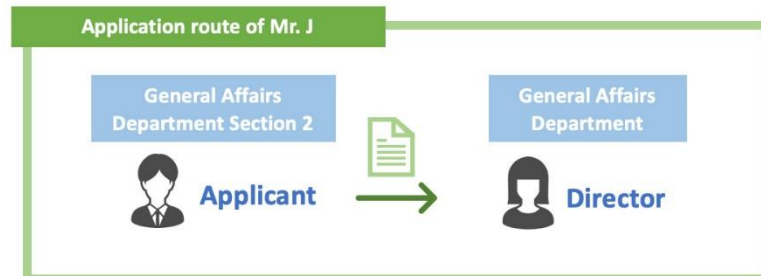
From the next page, we will guide you through the detailed procedure of the settings used when determining the superior.

7.7.2 Add Job Title
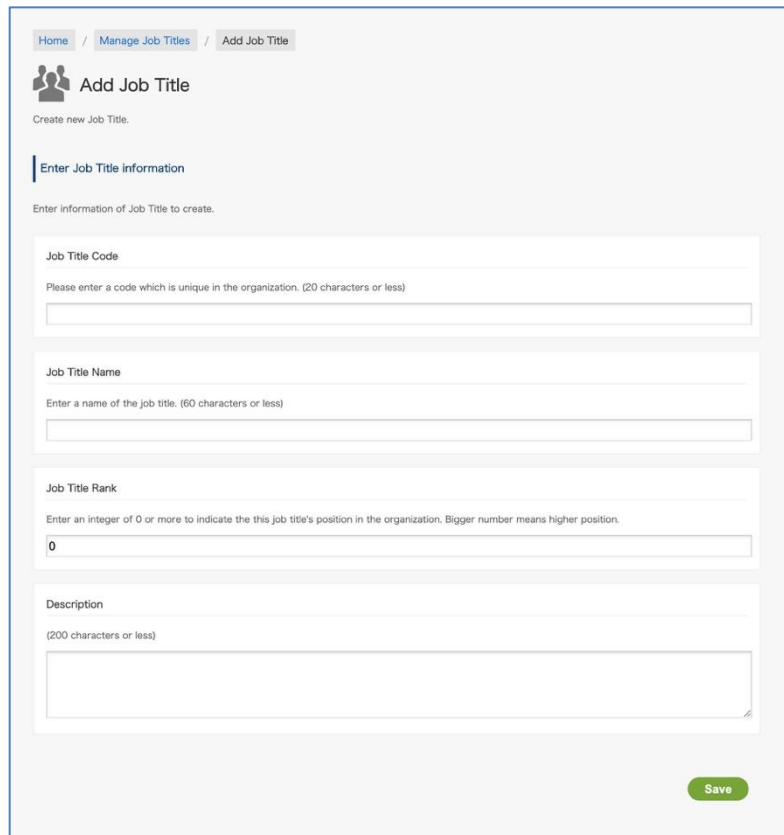
You can go to the [Add Job Title] page from either of the following.

- rakumo Admin Console > **Manage Job Titles**
- rakumo Admin Console > Workflow Settings > **Manage Job Titles**

Click the [**+ Add Job Title**] button.

[**Add Job Title**] page

① **Job Title Code * Required**

Specify a unique code of 20 characters or fewer for the whole organization.

② Job Title Name * Required

Enter a name of 60 characters or fewer for a Job Title (post, title).

③ Job Title Rank

Enter an integer greater than 0 as a Job Title in your organization. The Job Title depends on the magnitude of a number. Bigger number means higher position.

④ Description

Enter 200 characters or fewer for it.
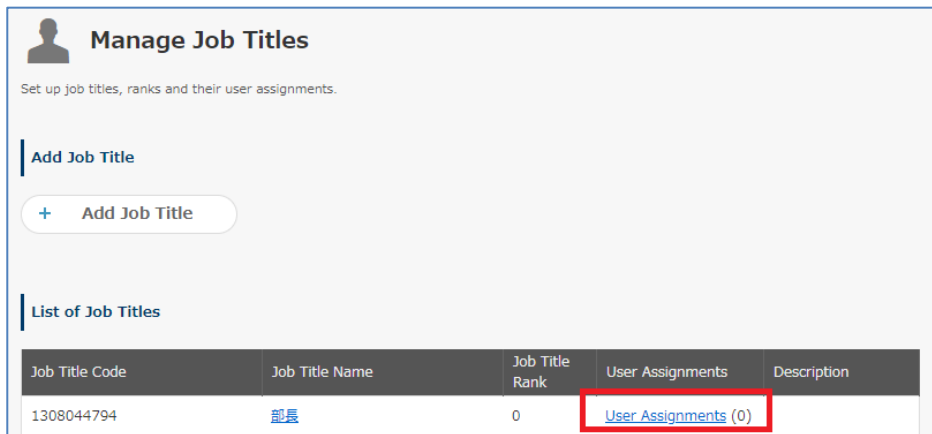
7.7.3 Assigning a User to a Job Title

When assigning users to a Job Title, you can do that in any of the following ways.

1. Assigning on the page
2. Assigning with a CSV file
3. Assign with Google Sync using custom attributes (*for advanced users)

1. Information is provided on how to assign users on the page.

Click **User Assignments.**

Enter your **user ID (email address)** first. Then, select a group from **your group ID (email address)** pull-down.

It is also possible to select by directly entering the group ID. Finally, click the [Add] button.

2. Information is provided on how to assign users with a CSV file.

Add the [Job Title Code] column to a CSV file. Enter the Job Title Code of the Job Title created on the [Manage Job Titles] page in the [Job Title Code] column. After entry, upload it onto the Manage Users page on the rakumo Admin Console.

* See **Appendix 1-3** of this manual for how to set a CSV file.

< Points to note>

* Assign a user to the created Job Title with a CSV file. However, you cannot edit a Job Title and specify a Job Title Rank.

* When entering and uploading an unregistered Job Title Code onto a CSV file, a Job Title with no name set is created.

* When adding the [Job Title Code] column to a CSV file and uploading it, all the status of user assignment to the Job Title are overwritten. If leaving the "Job Title Code" of the user allocated to the Job Title blank and uploading the CSV file, the status of the user is overwritten, so the user is excluded from the Job Title.

* When uploading a CSV file to which the [Job Title Code] column has not been added, no changes are made in user assignment of the Job Title under settings.

3. Information is provided on how to assign it with Google Sync using Custom Attributes.

Register the attribute for rakumo in the "custom attributes" of the Google user profile. And enable the use of "Custom Attributes" in the Google Sync runtime settings.

After performing the above settings, by executing Google Sync, the rakumo user settings set in the custom attribute can be reflected in rakumo.

This setup method requires knowledge of Google's user profile custom attributes and Directory API. Also the use of tools used to register user profiles and custom attributes in Google Workspace and the use of the Directory API are out of the scope of rakmo's standard support.

For this reason, we do not recommend using it unless you are familiar with Google's user profile custom attributes and the Directory API.

For more information, please refer to "**rakumo Common Administrator Manual" Appendix 6: Registering User Information Using "Custom Attributes" in Google User Profiles.**

  [Examples of using job titles]

*1 When a user with a Job Title as an approver is also a member of his/her department

When a user with a Job Title as an approver is also a member of his/her department, he/she is assigned to a Job Title accordingly.

For instance, when User A concurrently serves as a general manager in both "Tokyo Sales Department" and "Sales Headquarters Department", assign "User A of Tokyo Sales Department" and "User A of Sales Headquarters Department" to [General Manager Group].

As a result, an approver for an applicant belonging to "Tokyo Sales Department" is "User A, General

manager of Tokyo Sales Department". Meanwhile, an approver for an applicant belonging to "Sales Headquarters Department" is "User A, General Manager of Sales Headquarters Department".

Also, when User B concurrently serves as a manager in both "General Affairs Department" and "Management Division, General Affairs Department," assign "User B of General Affairs Department" to [General Manager Group] and "User B of Management Division, General Affairs Department" to [Manager Group].

As a result, an approver for an applicant belonging to "General Affairs Department" is "User B, General Manager of General Affairs Department". Meanwhile, an approver for an applicant belonging to "Management Division, General Affairs Department" is "User B, Manager of Management Division, General Affairs Department".
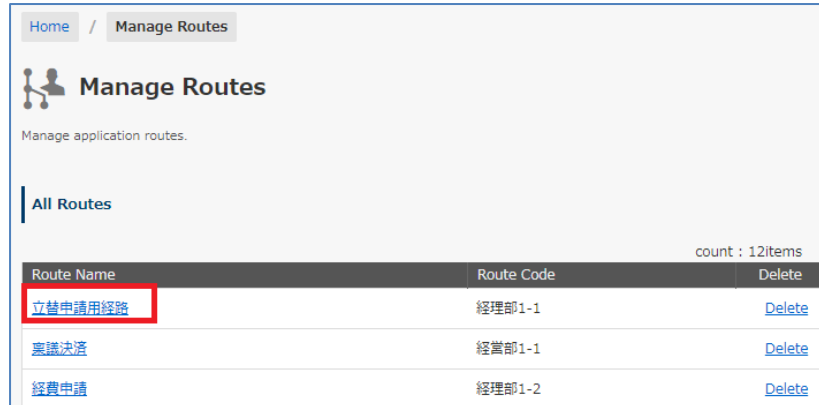
*2 Example of " Job Title Rank"

When a user in a Job Title group with an integer of 1 or higher entered in the Job Title Rank submits an application, a user in the Job Title group with a Job Title Rank equaling or surpassing the applicant's is automatically displayed as an approver.
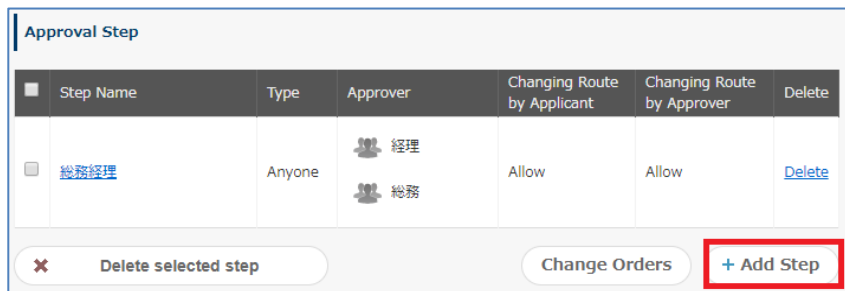
7.7.4 Assigning a Job Title Group to an Application Route

Go to Workflow Admin Console > Manage Routes > **list of registered application routes** and click the
name of the route you want to set.
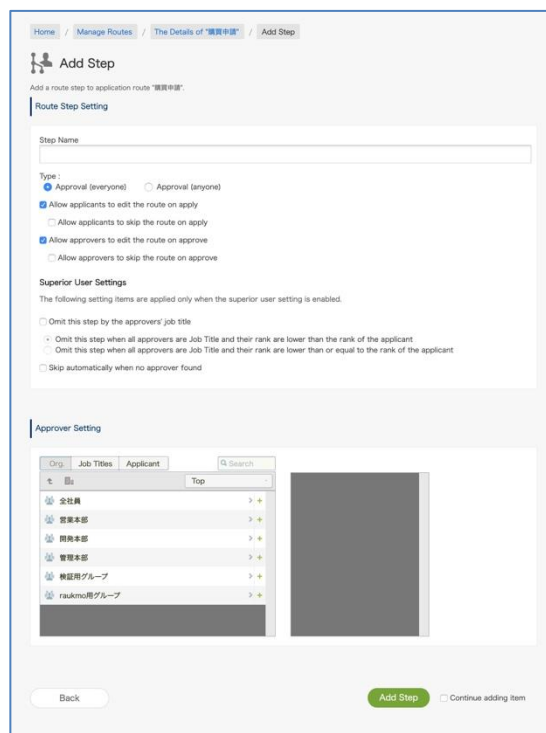
Click [**+ Add Step**].

Approver Setting > select the [Job Titles] tab > select a Job Title group > [**Add Step**]

Superior User Settings

□ **Omit this step by the approvers' job title**

When the check is turned on, select the omission behavior from the following.

□ **Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**

The route of the post / charge in the same position is not omitted.

□ **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**

The route is omitted for the job title / charge in the same position.

Selecting this, steps are automatically omitted under the following conditions.

- All approvers and reviewers in a step have been set with a Job Title group
- A superior has been set (Job Title and Superior User or Job Title and One Nearest Superior User)
- A value of 1 or higher has been set to the Job Title Rank of the Job Title group of approvers and reviews
- A value of 1 or higher has been set to the Title Rank of the application department of an applicant
- The application department of an applicant is higher than the Job Title of an approver in status.

<Setting example and omitted behavior>

This section introduces the behavior when [**Omit this step by the approvers' job title**] is set in the following step.

For instance,

Step 1: Approval by assistant manager... Job Title group "Assistant manager", Job Title Rank (10), Superior setting enabled

Step 2: Approval by manager... Job Title group "Manager", Job Title Rank (20), Superior setting enabled

Step 3: Approval by general manager... Job Title group "General manager", Job Title Rank (30), Superior setting enabled

If you select "**Omit this step when all approvers are Job Title and their rank are lower than the rank of the applicant**"

When a user with a Job Title Rank (10 or lower) submits an application, the approvers in Steps 1, 2 and 3 are displayed.

When a user with a Job Title Rank (greater than 10 and less than or equal to 20) submits an application, the approvers in Steps 2 and 3 are displayed.

When a user with a Job Title Rank (greater than 20 and less than or equal to 30) submits an application, the approvers in Step 3 are displayed.

If you select " **Omit this step when all approvers are Job Title and their rank are lower than or equal to the rank of the applicant**"

When a user with a Job Title Rank (less than 10) submits an application, the approvers in Steps 1, 2, and 3 are displayed.

When a user with a Job Title Rank (10 or more and less than 20) submits an application, the approvers in Steps 2 and 3 are displayed.

When a user with a Job Title Rank (20 or more and less than 30) submits an application, the approvers in Step 3 are displayed.

However, when all steps are omitted, no one can submit an application.

□ **Skip automatically when no approver found**

Check On: Automatically perform skip processing when no approver found in the step.

When selected, steps under the following conditions will be automatically skipped when vacant:

- All approvers and reviewers in a step have been set with a Job Title group
- A superior has been set (Job Title and Superior User or Job Title and One Nearest Superior User)

<Example>

Example 1: Automatically skip steps when the Job Title of "assistant manager" is set in the "assistant manager" step, and there is no processor in the "assistant manager"step because of the manager applied.

Example 2: When appling an application from a department without "Assistant Manager" or "Deputy Director" via an application route such as "Approval of Assistant Manager → Approval of Deputy Director → Approval of Department", steps there is no processor is automatically skipped.

* However, all steps on the route will be subject to automatic skip processing, and if the route change by the applicant is prohibited, you will not be able to apply.

7.7.5 Enabling Superior Settings

Configure the advanced settings of the post/charge group assigned to the application route.

□ **Exclude Applicant**
When the applicant is among the approvers, users other than the applicant are displayed as approvers.
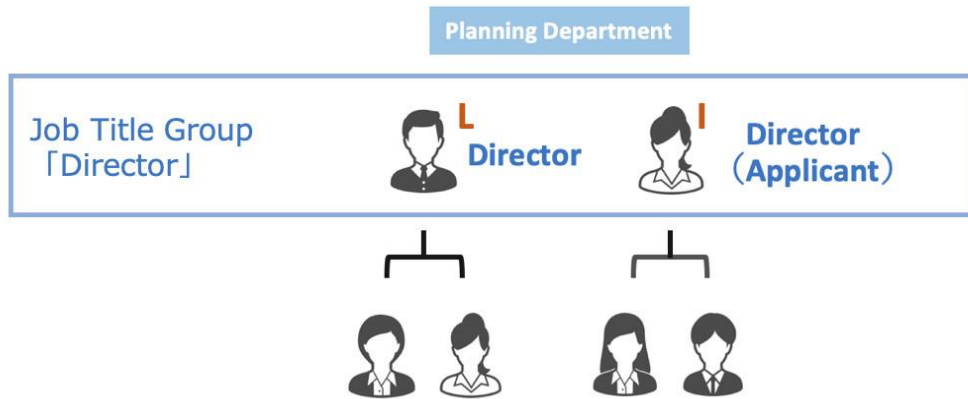
When user I, who is registered with the manager group, submits an application, users I and L are displayed as approvers usually. When [**Exclude Applicant**] is selected, user I, who is the applicant and an approver, is not displayed in the application route as an approver, and only user L is displayed as an approver.

1. **[All "Job Titles"]**

    -> **All** the users registered with the Job Title group are **displayed as approvers/reviewers**.

    Because of this, [All Job Titles] is not a function to automatically display only superiors as approvers.

    Job Title: The manager group (users B, D, F, and G)
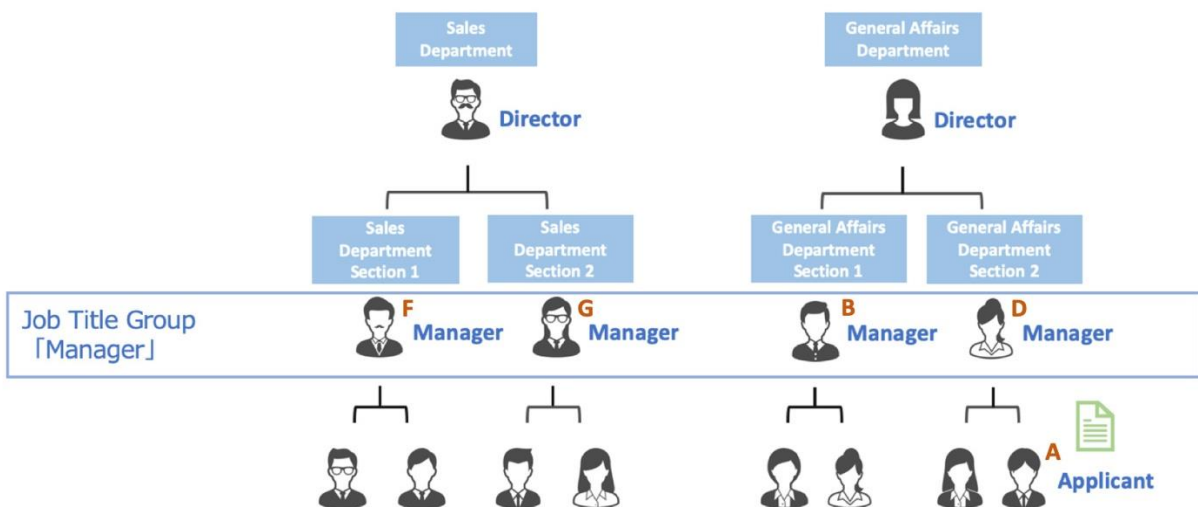
2. **Job Title and Superior User**

-> Among the users registered with the Job Title group, **only the applicant's superior is displayed as an approver/reviewer**. Multiple users can be displayed as approvers/reviewers.

Job Title: General Manager group (users B, D, and H)
When user A submits an application, user B, who is the head of the General Affairs Department, of which user A is a member, and user H, who is the head of a department on the level above the General Affairs Department, are displayed in the application route as approvers.
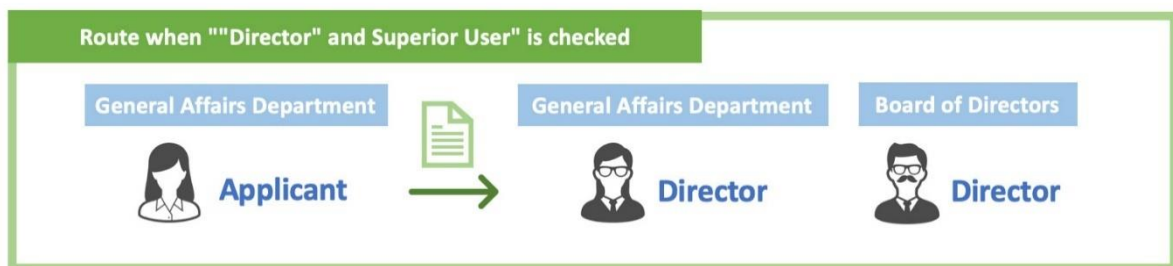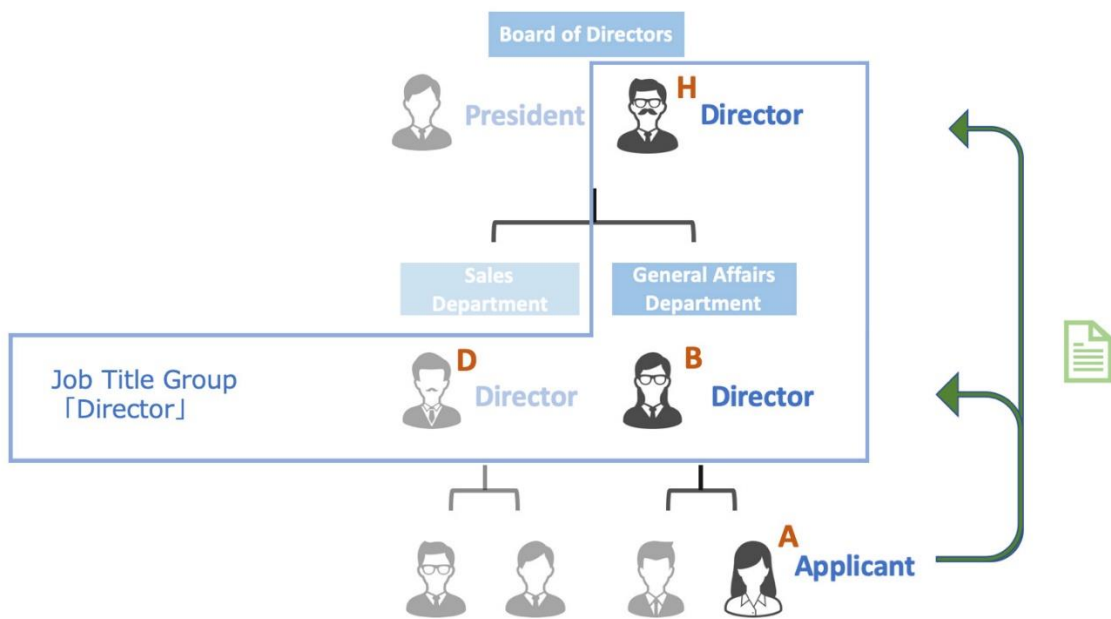
3. **Job Title and One Nearest Superior User**

   -> Among the users registered with the Job Title group, **only one immediate superior** of the applicant **is displayed as an approver**.

   Job Title: General Manager group (users B, D, and H)
   When User A submits an application, only User B, who is the head of the Accounting Department, to which User A also belongs, is displayed as approver in the application route. User H, who is the manager of the upper hierarchy, is not displayed as an approver.
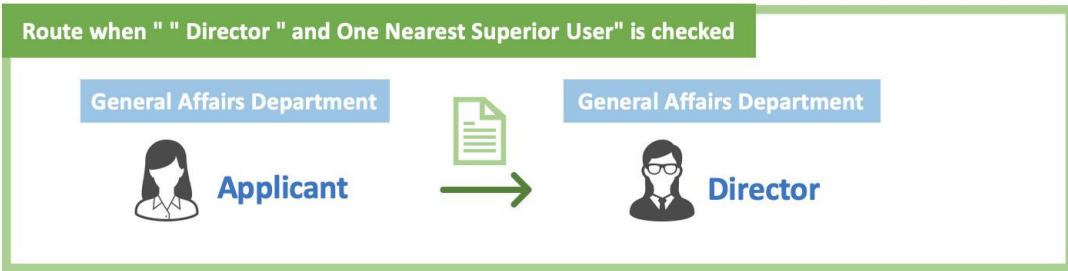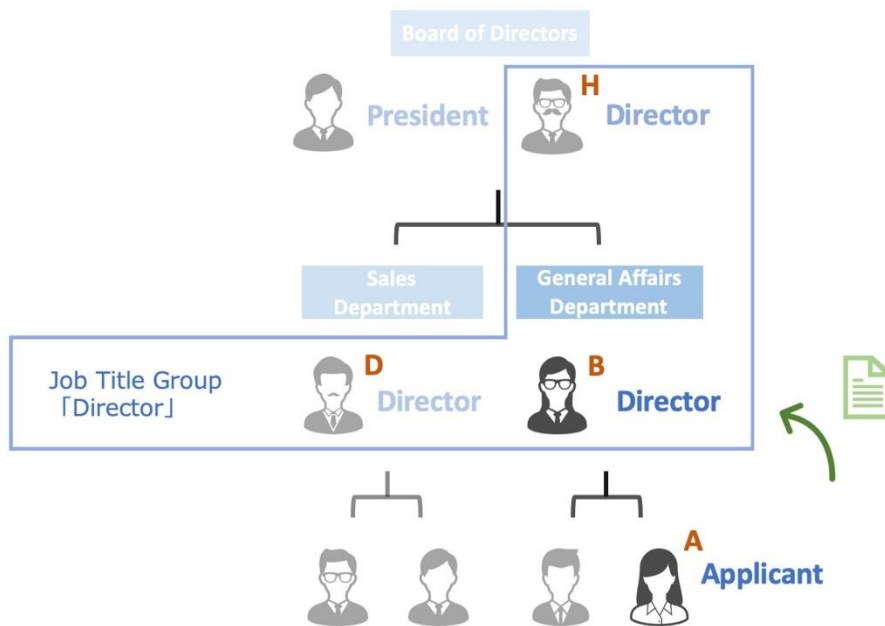
7.6.6 Superior's Decision Where the Applicant is a Member of Multiple Google Groups

When an applicant is a member of multiple Google groups, you need to select either of the following two patterns about the superior's decision.

[1] The user can submit an application as a member of one specified organization. Only users higher than the level of the organization are subject to approvers as superiors.
[2] The user selects either of the two organizations whenever he/she submits an application. Users higher than the selected organization are subject to approvers as superiors.

Details of the patterns and settings are described below.

[1] The user can submit an application as a member of one specified organization. Only users higher than the level of the organization are subject to approvers as superiors.

When User A belongs to Sales Department Section 2 and General Affairs Department Section 1 (One specified organization is General Affairs Department Section 1), the user can submit an application only as a member of General Affairs Department Section 1. The user cannot submit an application as a member of Sales Department Section 2.
As to the superior's decision, users within General Affairs Department Section 1 and ones higher than General Affairs Department Section 1 are subject to approvers.
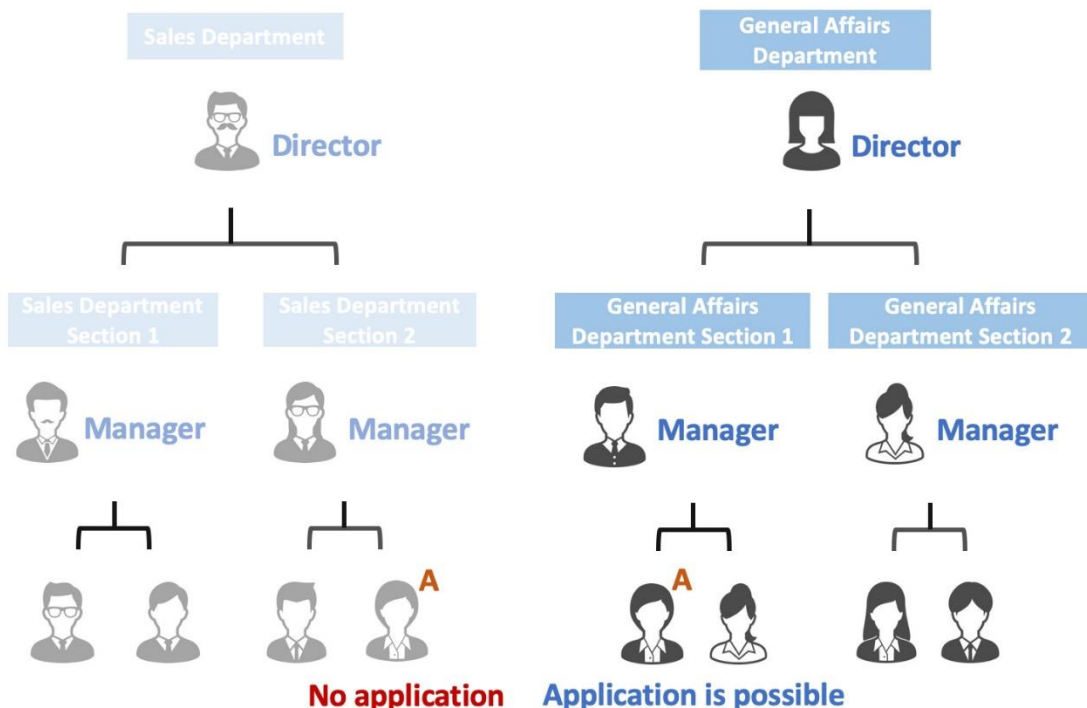
Necessary setting 1

Go to General Settings, deselect [**Enable**] in **Application Department** and click [**Save Changes**].

Necessary setting 2

You need to specify one organization (Primary group) for each user.

In the previous example, you need to specify General Affairs Department Section 1 as one specified organization (Primary group) for User A. When you set a priority organization, an approver is displayed in accordance with the priority organization (higher than the General Affairs Department Section 1).

Please specify the priority organization for each user from "Parent groups of [User name]" on the rakmo Admin Console > Manage Users(Display Settings) > User Details.

When specifying all at once, in the CSV file you downloaded from rakumo Admin Console, register "1" with the "Primary" item in the row where the primary group is displayed. Register "0" for organizations other than that. Use only "1" and "0" to register items in column "Primary". Also, you can set only one priority organization per user.

* For how to register a CSV file, see the appendixes 1 to 3 of this manual.

[2] The user selects either of the two organizations whenever he/she submits an application. Users higher than the selected organization are subject to approvers as superiors.

When User A belongs to Sales Department Section 2 and General Affairs Department Section 1, the user can select either Sales Department Section 2 or General Affairs Department Section 1. As to superior's decision, users within Sales Department Section 2 and ones higher than the section are subject to approvers when Sales Department Section 2 is selected. Users within General Affairs Department Section 1 and ones higher than that section are subject to approvers when General Affairs Department Section 1 is selected.
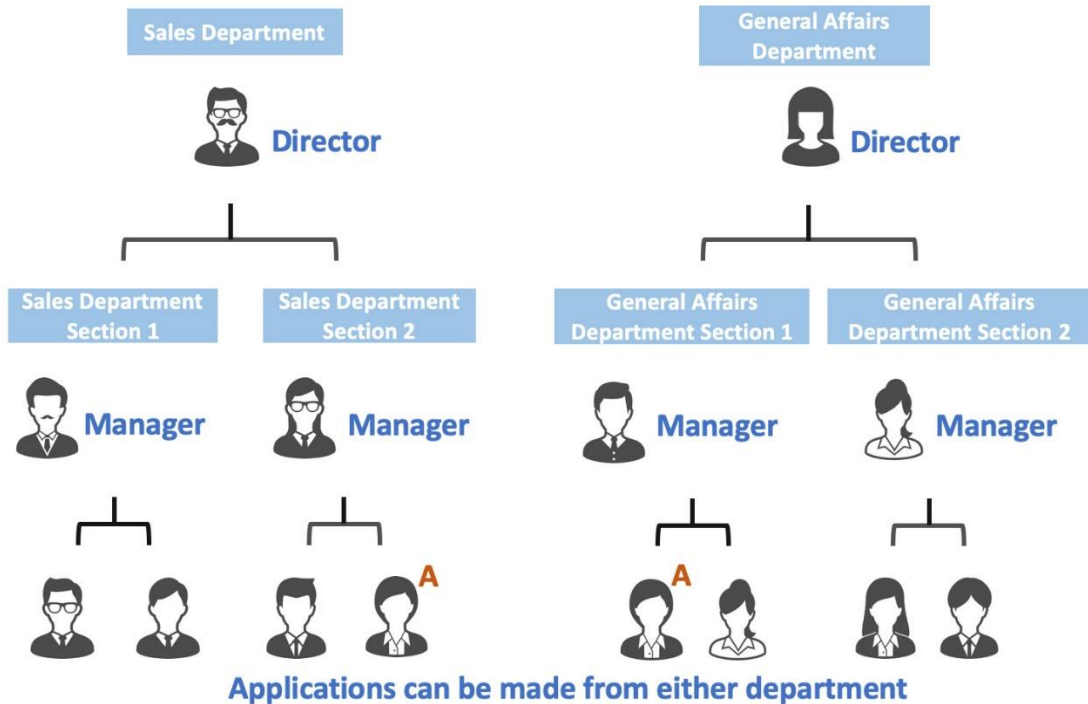
Necessary setting

Go to General Settings, select [**Enable**] in **Application Department** and click [**Save Changes**].

Difference on the User page when [Enable] in Application Department is selected

When [Enable] in Select Application Department is selected on rakumo Admin Console, the pull-down menu of **application departments** is displayed on the Create Application Form page. You can select your organization from the pull-down menu of application departments to submit an application. You can select an organization that meets the following two conditions from the pull-down menu.

● Organization an applicant belongs to
● Organization displayed on rakumo Admin Console

To add information of the application department displayed when Select Application Department is enabled to a CSV file, select [Add Application Department to CSV] and click [Save Changes].
* If [Add Application Department to CSV] is not selected, information of the application department is not output in the CSV file to be downloaded from rakumo Workflow Admin Console>Download Application Form.

When you select [Add Application Department to CSV], the following items are added to the CSV file.

● **Application department name**
● **Application department** (group mail address)

[N.B] When users in the parent group of an applicant are not displayed as superior approvers

Information is provided for countermeasures when users in the parent group of an applicant are not displayed as superior approvers (or, when other approvers are displayed).

For instance, the following organizational hierarchies are provided.

Sales Headquarters Department (Parent)-Sales Department Section 1 (Child)

● Applicant: User A who belongs to Sales Department Section 1

● Superior approver: User B of General Manager who belongs to the Sales Headquarters Department

When User A submits an application, User B is not displayed as an approver (or other approvers are displayed)

Check the following when the above situation occurs.

● Whether the superior approver has been registered to the Job Title, You can check a Job Title in [Manage Job Titles].

● Whether the superior approver has been registered in the Job Title including your group. For instance, User B has to be registered as the General Manager belonging to the Sales Headquarters Department.

● Whether it has been hierarchized as a parent and a child among groups

● Whether a group to which the users to be displayed as superior approvers is the top from a child group view when a child group belongs to several parent groups, You can check the [Parent Group List] of the [Child Group] from rakumo Admin Console>Manage Groups>Details on Subordinate Organization page. Superior approvers have to belong to groups topping this list. The order of the list is the order of ASCII codes on the header of group addresses.

8. Manage Applications Forms

8.1. Check Application Data

You can display application data submitted in the past in a list format.

Workflow Admin Console > Home > Manage Applications > Select the application category > select an application form

A **list of applications using application forms** is displayed at the bottom of the page.

List of applications using the application form [Appl. Form Name]

List of Applications of "稟議書"							
Keywords:							
Narrow down:	All status						
Base Date:	✓ Appl. Date	○ Final Decision Date					
Time Period:		📅 -	📅			Narrow down	
Status	**Appl. Date**	**Appl. Number**	**Title**	**Priority**	**Applicant**	**Final Decision By**	**Details**
In progress	2020/02/26 18:22	2	リモートワークに関する稟議書	Not Specified	吉沢 太郎		Details
					First 100	1 - 1	Next 100 »

By default, the latest 100 items are displayed.

You can search by entering keywords or narrow down by conditions.

[keywords]

You can search for an application by entering keywords.

● Search with partial match. You can perform an AND search by entering multiple words separated by spaces.

● Perform a keyword search from the selected application form. You cannot search across multiple application forms.

● When performing a keyword search, the base date is fixed at "Appl. Date". Keyword search is not possible with the "Final Decision Date" standard. Thank you in advance for your understanding.

The target items for keyword search are as follows.
・ Appl. Category(Form Name)
・ Appl. Number

- Name of Appl. Dept（*1）

- Email address of Appl. Dept（part before @）

- Title

- Applicant's name / email address

- Comments at the time of re-application

- Comments at the time of approval or operation or circulation

- Value entered in [Item:Text Input]

- Value entered in [Item:Multiple Rows Text]（*2）

- Value selected in [Item:Pulldown]

- Value selected in [Item:Radio]

- File name attached to [Item:File Attachments]

- File name attached to [Item:Google Drive File Attachments]

- The value selected in [Item:Master Integration] and the value to be displayed in the result（*3）

- Value selected in [Item:Lookup]

* 1 Applicable only for applications updated after February 19, 2020

* 2 Searching across line breaks is not supported.

* 3 For the value selected in the master data and the value displayed in the result, check the image below.

[Narrow down]

You can select one of the following: [**All status**], [**Approved, Completed**], [**In Progress**], [**Approval**], [**Rejected**], [**Returned**], [**Completed**], and [**Cancelled**].

[**Approval**]: Approval has been completed in all approval steps, but operation steps and circulation steps remain in the subsequent route and are incomplete.

[**Completed**]: The application has gone through all the steps including the Approval step, Operation step, Circular step.

[**Approved, Complete**]: Extracts applications that meet either one of the conditions "The application has passed the approval step, but has not yet passed the circular or operation step and is not complete." and "the application has gone through all the steps including the Approval step, and Circular step."

[Base Date]

[**Appl. Date**]: Select to set the day the applicant submitted the application as the base date.

[**Final Decision Date**]: Select to set the day the final approval step is completed as the base date.

[Specify the period by day, month, and year]

Enter a single-byte day, month, and year to specify the period.

Click [**Narrow down**].

You can check the details of an application form by clicking its [**Details**].

[Application Details] page

You can check applied application form data using the already deleted application form from **>> Deleted Application Forms**. See **8.4 Checking Applied Application Data with Deleted Application Form**.

8.2. Cancel and Delete an Application

8.2.1 Cancel an Application

You can cancel applications on the Workflow Admin Console regardless of the current application status.

Workflow Admin Console > Home > Manage Applications > Select the application category > select an application form
A **list of applications using application forms** is displayed at the bottom of the page.

Click [**Details**] of the application form you want to use.

Enter a comment as needed in **[Cancel Application]** on the [Application Details] page and click [**Cancel this Application**].
The approvers of the application cannot approve or reject, but can only review.

8.2.2 Deleting an Application

You can delete applications on the Workflow Admin Console regardless of the current application status.
* Note that applications cannot be restored once deleted. Also, administrators with all the Workflow Admin Console permissions and operators for the relevant application category are the only users that can delete applications.

Workflow Admin Console > Home > Manage Applications > Select the application category > Select an application form. A **list of applications using application forms** is displayed at the bottom of the page. Click [**Details**] of the application form you want to use.

Click [**Delete this Application**] after selecting this **[Delete this Application]** on the [Application Details] page.

Note that you cannot restore deleted application forms once you have performed this operation.
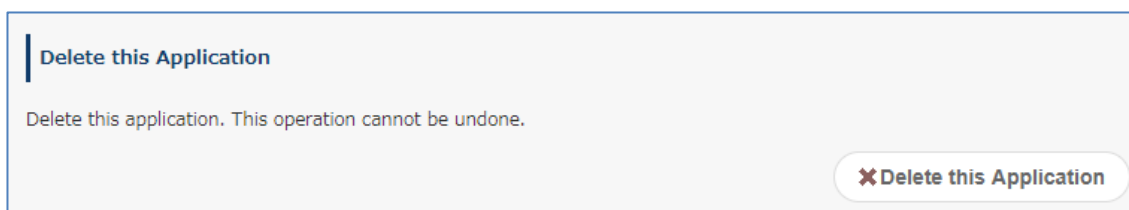
8.3. Approving (Reviewing) an Application as a Proxy

On the Workflow Admin Console, administrators can approve, review, done, reject, and return application forms as proxies for an approver in the application route.

Example use:

● When the application process is not in progress because approver A in the application route is absent for a long time

● When the application process is not in progress because Approver B in the application route has resigned, and their account is already deleted.
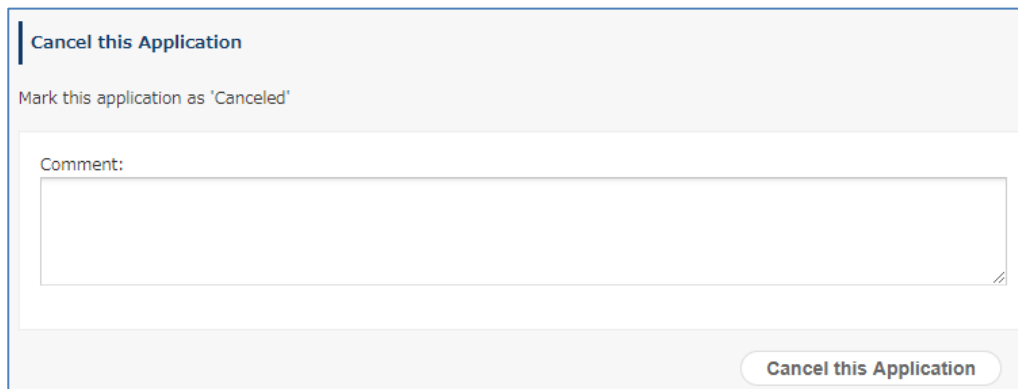
Workflow Admin Console > Home > Manage Applications > Select the application category > Select an application form

A **list of applications using application forms** is displayed at the bottom of the page.

Click [**Details**] of the application to be used.

In [**Proxy**] of the [Application Details] page, select [Approve/Check], enter a comment and click any of [**Remand**] or [**Reject**] and [**Approve/Check**].

* For operation steps, read "Approval / Circulator" as the "Operator" and "Approve / Confirm" as "Complete".

* To perform [**Remand**], select a recipient at [Return to] and click [Remand].

When you approve of an application as a proxy on the Workflow Admin Console, the name of the manager is recorded and displayed as a proxy approver in the same manner as regular proxy approvers.

You can also check the operations logs at [Operation Logs] on the Workflow Admin Console.

Workflow Admin Console > Operation Logs > Type :Applications

* Proxy approval on the Workflow Admin Console does not have features such as adding approvers to steps and editing application forms. Thank you for your understanding.

8.4. Checking Application Data Submitted with Deleted Application Forms

You can check a list of application forms deleted after creating it and use already deleted application forms to check submitted application form data.

Workflow Admin Console > Home > Manage Applications > click **>> Deleted Application Forms**
A list of deleted application forms is displayed.
The application forms displayed on the **list in the deleted application forms** are not displayed if they have never been used by a user to make an application.

You can check application data from a **list of application forms using the forms** displayed on the bottom of the page.

* See **8.1 Check Application Data** for filtering criteria.

9. CSV Export of Applications

You can download application data in a CSV file.

Workflow Admin Console > Export Applications

9.1. How to Download Application Data as a CSV File

1. Filter by criteria.

[Narrow down]

You can select one of the following: [**Approved, Completed**], [**In Progress**], [**Approval**], [**Rejected**], [**Returned**], [**Completed**], and [**Cancelled**].

[**Approval**]: Approval has been completed in all approval steps, but operation steps and circulation steps remain in the subsequent route and are incomplete.

[**Completed**]: The application has gone through all the steps including the Approval step, Operation step, Circular step.

[**Approved, Complete**]: Extracts applications that meet either one of the conditions "The application has passed the approval step, but has not yet passed the circular or operation step and is not complete." and "the application has gone through all the steps including the Approval step, and Circular step."

[Base Date]

[**Appl. Date**]**:** Select to set the day the applicant submitted the application as the base date.

[**Final Decision Date**]**:** Select to set the day the final approval step is completed as the base date.

[Specify the period by day, month, and year]

Enter a single-byte day, month, and year to specify the period.

* Set the period to 3 months or less.

2. Select an application form.

 Select an application category > select an application form (select the checkbox)

 You can also select an application form regardless of the application category.

3. A list of application forms you selected is displayed at the bottom of the screen. After checking them, click the [**Create CSV file**] button.

4. A process starts to export a CSV file. Update the screen after a while.

5. Download application forms with the [Download] button.

CSV file names are downloaded in the following format.

 {# Application form code #}_{# Start date #}_{# End date #}

9.2. How to Download Application Data as a ZIP File

* These features are optional. You need to apply to use them separately.

You can download application data in a ZIP file.

Workflow Admin Console > Export Applications > ZIP Export

① **The remaining number of times of generating ZIP files is displayed.**

② **Narrow down**

   You can select one of the following: [**Approved, Completed**], [**In Progress**], [**Approval**], [**Rejected**], [**Returned**], [**Completed**], and [**Cancelled**].

    [**Approval**]: Approval has been completed in all approval steps, but operation steps and circulation steps remain in the subsequent route and are incomplete.

   [**Completed**]: The application has gone through all the steps including the Approval step, Operation step, Circular step.

   [**Approved, Complete**]: Extracts applications that meet either one of the conditions "The application has passed the approval step, but has not yet passed the circular or operation step and is not complete." and "the application has gone through all the steps including the Approval step, and Circular step."

③ **Base date**

   [**Appl. Date**]: Select to set the day the applicant submitted the application as the base date.

   [**Final Decision Date**]: Select to set the day the final approval step is completed as the base date.

④ **Period of narrowing down**

    Enter a single-byte day, month, and year to specify the period.

    * Set the period to 3 months or less.

⑤ **Select the application category.**

⑥ **Select an application form.**

    Select an application form to be downloaded.

⑦ **The application form selected in 6 is displayed.**

⑧ **Click the [Create ZIP] button.**

After clicking [**Create ZIP**], a ZIP file is generated. Update the page after a while.

When [Create ZIP] is completed, the [**Download**] button is displayed for each of the specified application forms. Click the [**Download**] button to download the ZIP files.

Application forms within the specified period are collected for each application form and downloaded into the ZIP file. **Download application forms within 24 hours after generation.** After 24 hours, you need to perform specified operation again.

Errors on creating file

This is displayed when there are no application forms that meet the criteria for narrowing down within the specified period.

[How to count generated ZIP files]
the number of ZIP file generation is counted at per application form one zip file.
The number of times of generating ZIP files is counted when the [Download] button is displayed, not when a ZIP file is downloaded. When <u>all the specified application forms</u> are displayed in the Errors on creating file, the number of ZIP file generation is not counted.

For instance, when one of five specified application forms are displayed in the Errors on creating file while the [Download] button is displayed for the remaining four, the number of generation is counted by four.

<Downloaded ZIP file>

The name of a downloaded ZIP file is in the following format.
{Application form code}_{Narrowing down start date}_{Narrowing down end date}. zip
Example: Application for purchase (office supply)_20141001_20141031.zip

<Content of ZIP file>

Folders ({Application date or final decision date}_{Application number}) for application forms within the specified period are created in the ZIP file for each application form.
　File included in the Application Form folder
- PDF file for an application form
- Local file attached to an application form

- Text file containing the list of Google Drive files attached to an application form

10. Manege Deputy

You can register a deputy approver and proxy applicant for users.

<ins>* You can register only one deputy approver and one deputy applicant for one user. You cannot register 2 or more deputy approvers or 2 or more deputy applicants for one user.</ins>

10.1. Register a deputy Approver/Proxy Applicant for a User

Workflow Admin Console > Home > Manage Deputy
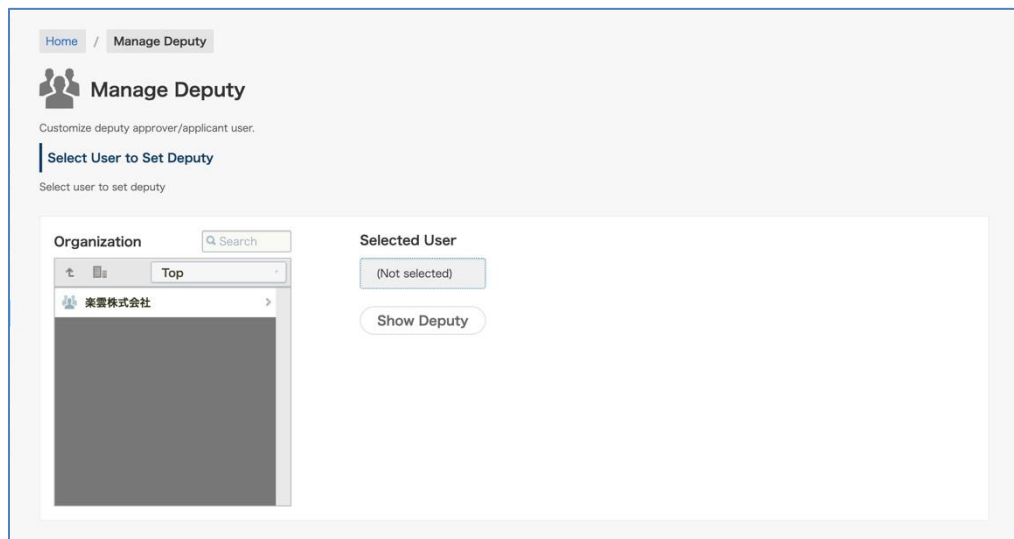
Select a person represented by a deputy

[Organization]

Select a person to whom you assign a deputy by organization. You can also select by [search].

[Selected User]

The users selected by "Organization" are displayed. Click the [**Show Deputy**] button if it is OK.

10.1.1 Assign a deputy Approver

In the above case, a user is assigned that can approve of applications on behalf of Mr. Hiroaki Tsuzuki.

Click the [**Assign Deputy Approver**] button.

After selecting a user in [Organization], check [Selected User] and click the [**Save**] button.
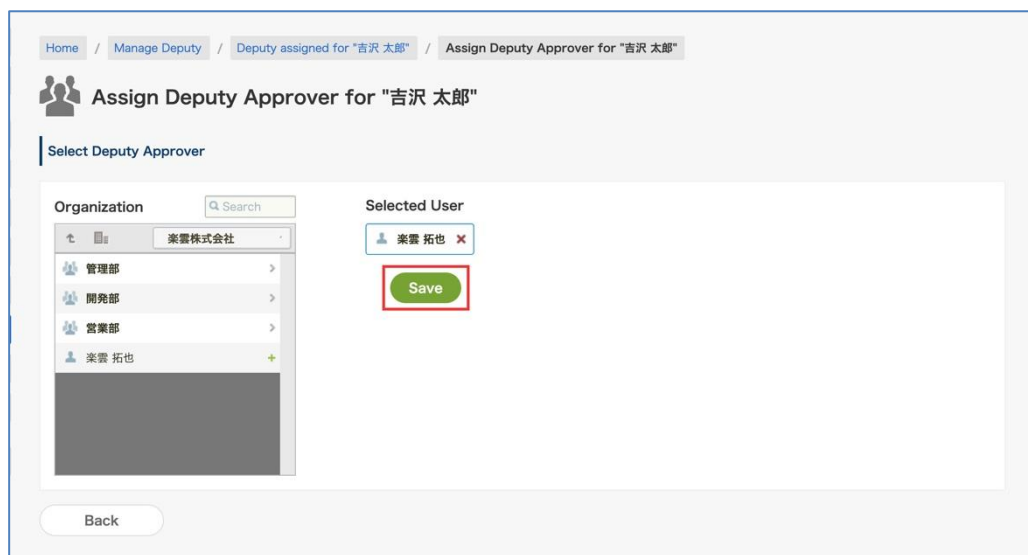
Mr. Takuya Rakumo can approve of applications on behalf of Mr. Taro Yoshizawa.

 (*) The deputy approver cannot process the following application forms.

・ Viewing and approving application contents that have arrived at the agent before being set as a deputy approver

・ "Confirmation" and "Operation done" processing of application forms delivered to agents

If for some reason it is necessary to perform "confirmation" or "Operation done" processing on behalf of the user, please consider performing deputy processing by the administrator. For the proxy processing by the administrator, please refer to 8.3. Approving (Reviewing) an Application as a Proxy.

10.1.2 Assign a deputy Applicant

In the above case, a user is assigned that can apply on behalf of Mr. Hiroaki Tsuzuki.
Click the [**Assign Deputy Applicant**] button.

After selecting a user in [Organization], check [Selected User] and click the [**Save**] button.
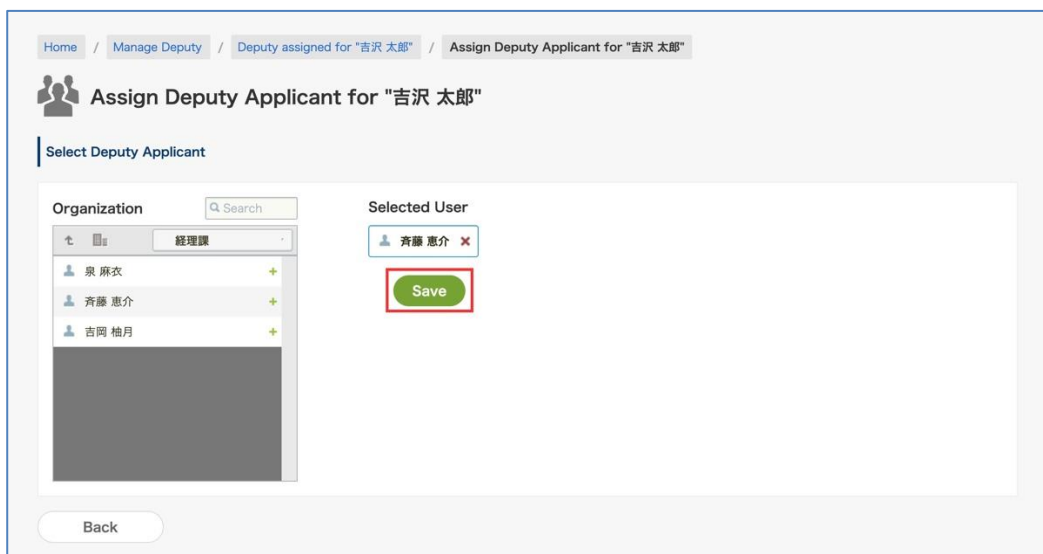
Mr. Keisuke Saito can apply on behalf of Mr. Taro Yoshizawa.

(*) The proxy applicant cannot process the following application forms.

・ Browsing the contents of applications created by delegates before being set as a deputy applicant

・Re-application when the application form for deputy application is returned (only viewing of the result is possible)

10.2. Bulk Register deputy in CSV File

You can upload a CSV file and register deputies at once.

Create a CSV file to set deputy information as shown below.

<Preparation>
Please prepare a CSV file for batch registration of deputies.
It is also possible to edit and use the CSV file that outputs the deputies information.
* For the output method, refer to "10.3 Outputting deputies information as CSV".

<Screen to operate>
Workflow Admin Console > Manage Deputy
https://a-rakumo.appspot.com/workflow/admin/deputy

<Setting procedure>

1. Click "ファイル選択（Select files）" in 「Bulk Registration of Deputy」 and select the CSV file.

2. Specify the character code, whether to skip the first line, and the batch registration method, and click "Upload".

3. When the upload is complete, the import results will be displayed.
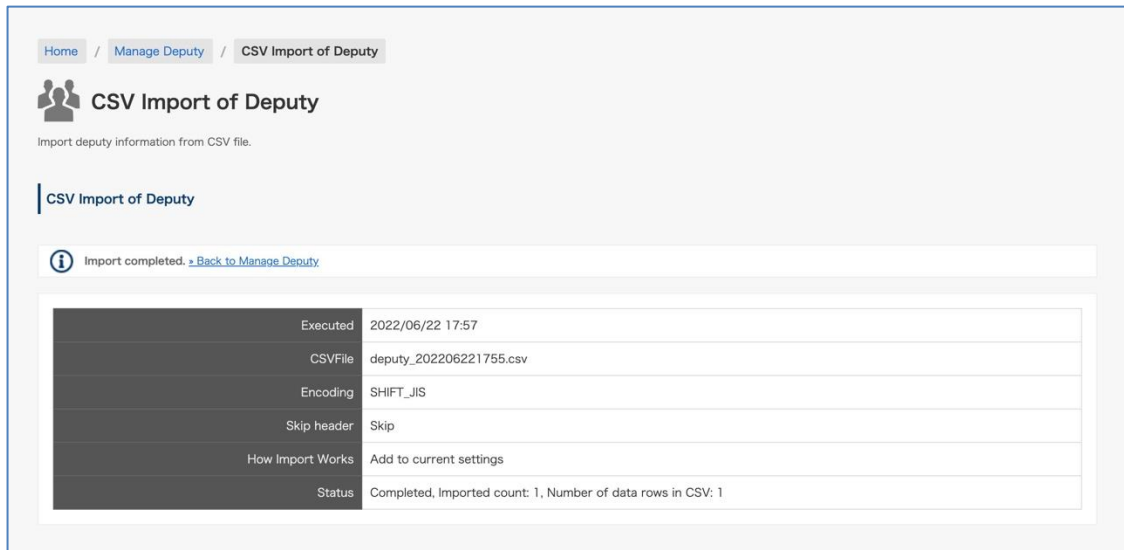
That is all.

<Format of the CSV file that sets proxy data in the rakumo Workflow>

To edit files, use Microsoft Office Excel and other spreadsheet software. The items required for the CSV file are as follows:

Name of Item*	Description	Remarks
User ID to be set	Email addresses of the users registered with Google Workspace	**Required fields**
Proxy applicant's user ID	Email addresses of the users registered with Google Workspace	**Required fields**
Proxy approver's user ID	Email addresses of the users registered with Google Workspace	**Required fields**

Points to note

* You do not have to enter the name of the item in the CSV file. When importing the CSV file while including the name of item, select [**Skip**] in the [**Skip header**] option.

* It is possible to set "deputy Applicant Only" and "deputy Approver Only", but make sure to set the CSV file to import with 3 columns in such cases as well.

10.3. Exporting deputies information as CSV File

You can export a list of currently registered deputies as a CSV file.

The CSV file is export in the same format as the file used in "Bulk Registration of Deputy".

You can modify the information in the export file and use it for "Bulk Registration of Deputy".

Please use it in the following cases.

・ When checking the setting status of deputies when changing personnel, changing organizations, or responding to audits

・ When changing the registered contents of an deputy at once
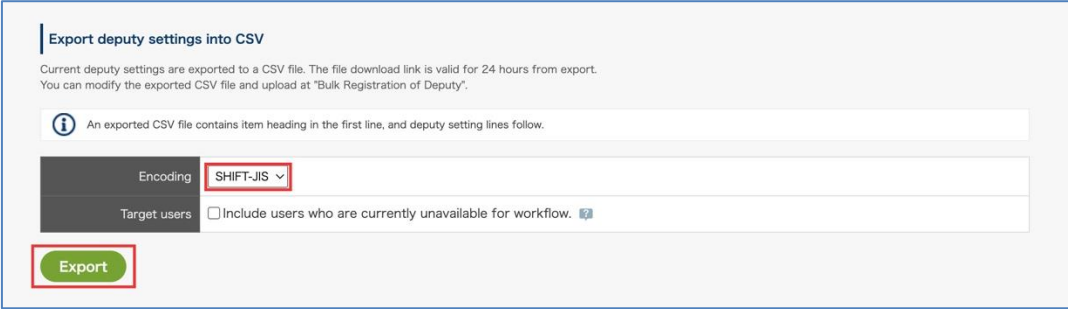
<Screen to operate>
Workflow Admin Console > Manage Deputy
https://a-rakumo.appspot.com/workflow/admin/deputy

<Setting procedure>

1. Select the character code in "Export deputy settings into CSV" and click "Export".
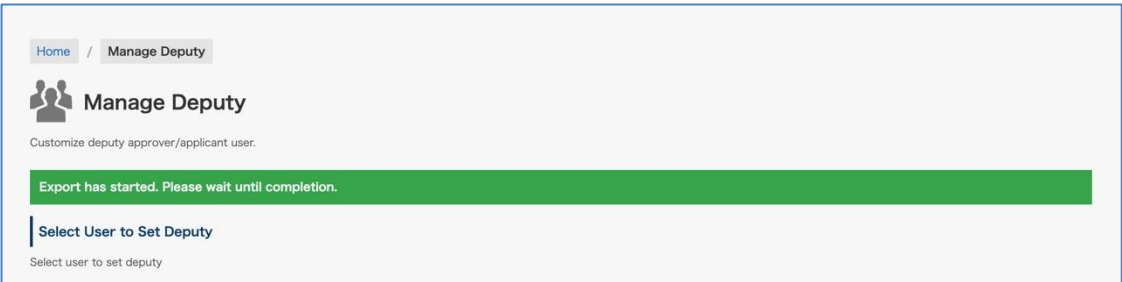
Check "Include users who cannot use workflow" if you want the output to include information about users who have been deleted or whose workflow licenses have been disabled.

2. At the top of the screen, a message indicating that export has started is displayed.

3. Click "→ Reload" in [Export deputy settings into CSV].
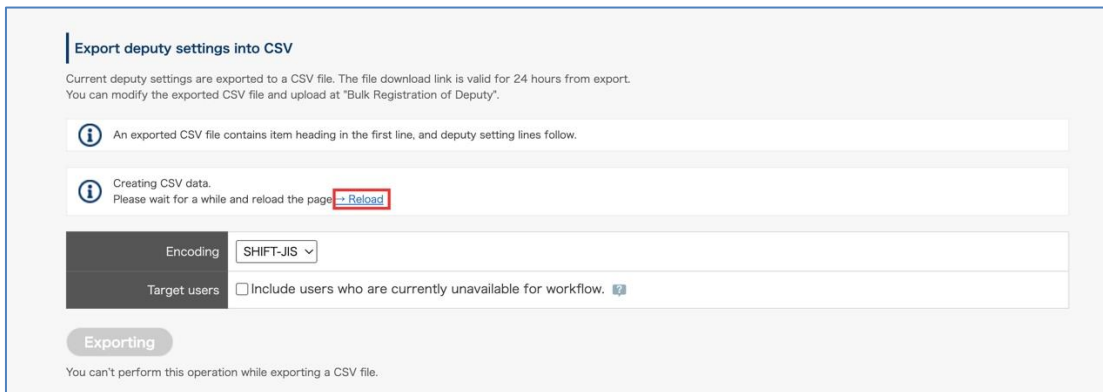
4. If the export is complete, you will see a download link.

Click [» Download the last exported CSV file.] to download the CSV file. The downloadable period is 24 hours after the output is completed.
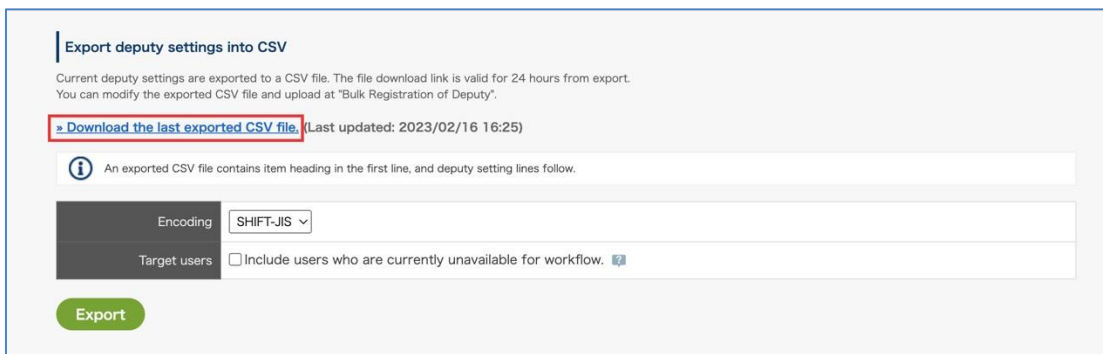
That is all.

- What to do in such a case?
  - ・ The download link is not displayed even if I press "→ Reload"
    Sorry to trouble you, but please try reloading the screen again after a while.

  ・The download link is not displayed.
    The downloadable period will end 24 hours after the export is completed.
    Perform the CSV file export operation again and download it.

● export deputy information CSV file format

Name of Item*	Description
User ID	Google Workspace Email address of the delegated user
Deputy Applicant	Google Workspace Email address of the user set as a deputy applicant
Deputy Approver	Google Workspace Email address of the user set as a deputy approver

Export example

	A	B	C	D	E	F	G
1	User ID	Deputy Applicant	Deputy Approver				
2	rakumo@demo.gigei.co.jp	yoshizawa@demo.gigei.co.jp	yoshizawa@demo.gigei.co.jp				
3	yoshizawa@demo.gigei.co.jp	saito@demo.gigei.co.jp	saito@demo.gigei.co.jp				
4	kobayashi@demo.gigei.co.jp	ninomiya@demo.gigei.co.jp	ninomiya@demo.gigei.co.jp				
5	ninomiya@demo.gigei.co.jp	kobayashi@demo.gigei.co.jp	kobayashi@demo.gigei.co.jp				

The first line is the heading,
The settings are output
on the second
and subsequent lines.

Points to note

* You do not have to enter the name of the item in the CSV file. When importing the CSV file while including the name of item, select [**Skip**] in the [**Skip header**] option.

* It is possible to set "deputy Applicant Only" and "deputy Approver Only", but make sure to set the CSV file to import with 3 columns in such cases as well.

10.4. Enabling / disabling agent notifications

You can set whether to send an email notifying the processing status of the application to the deputy approver and deputy applicant.

<Screen for setting>
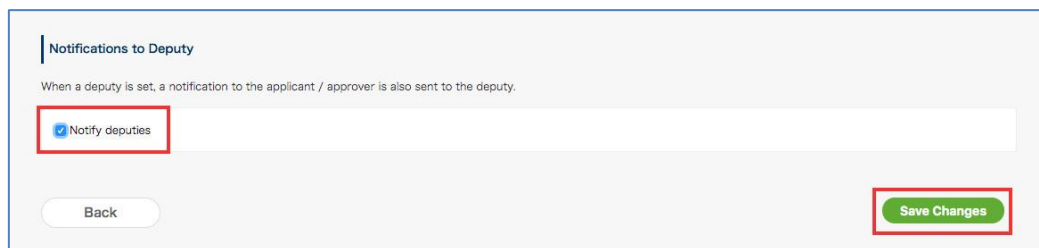
rakumo Workflow Admin Console > General settings

https://a-rakumo.appspot.com/workflow/admin/general/

<Setting procedure>

◇ **Enable notifications**

If the notification is enabled, the application will be notified to the deputy applicant and deputy approver at the timing when the application is notified to the original applicant / approver.

To enable it, check "Notify deputies" in "Notifications to Deputy" and click "Save Settings" at the bottom of the screen to save the changes.

◇ **Disable notifications**

If notification is disabled, application notifications are not sent to deputy applicants and deputy approvers. Only the original applicant / approver is notified of the application. The deputy applicant and deputy approver must log in to the user screen and check the processing status of the application.

If you want to disable it, uncheck "Notify deputies" in "Notifications to Deputy" and click "Save Settings" at the bottom of the screen to save the changes.
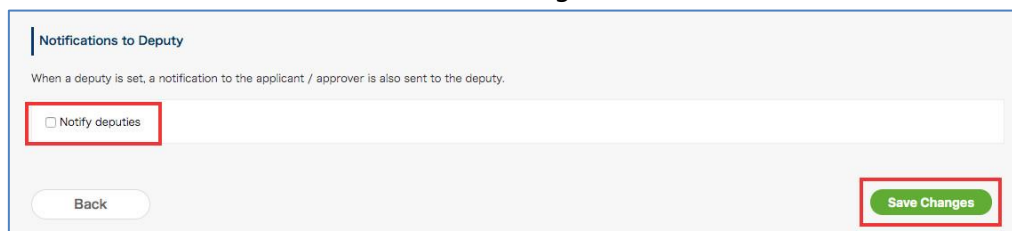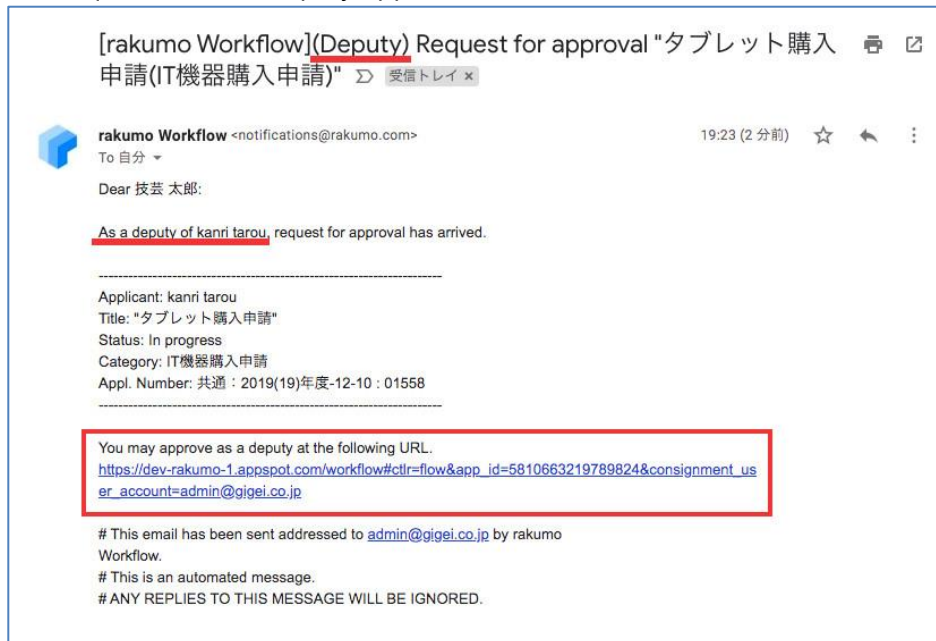
<Image of notification email content>

In the subject and body of the e-mail addressed to the deputy applicant and deputy approver, a word will be added that indicates that it is a deputy.

Example: Approval request email to deputy approver

Points to note regarding "Notifications to Deputy"

・Set a uniform value for each usage environment. It is not possible to control whether notifications are sent individually for each deputy. In addition, it is not possible to use only a deputy as the notification destination. Please note.

・Even if the setting is enabled, some notifications are not sent to the deputy (e.g. confirmation request email to the delegate, reminder email to the delegate).

・In the environment of the customer who started using the workflow after 12/17/2019, the valid state (notifying the deputy of the application form) is set as the initial value.

・In the environment of customers who have used workflows since 12/16/2019, the disabled status (does not notify the deputy of the application form) will be set until the administrator changes the setting to enabled. If you want to notify the deputy approver, please explicitly change the setting to "enabled".

11. Management of Master Data

11.1. Configure the Initial Settings of Master Data

Select [**Allow**] for **Master Integration** on the General Settings page

General Settings > Select [**Allow**] and click [**Save Changes**].

11.2. Create Master Data in a Google Drive Spreadsheet

Example: How to configure the settings to link Company Name with Manufacturer Product Number in the master data

Register data in a Google Drive spreadsheet. Finally, link "**Company Name**" in the company name master table with "**Manufacturer Product Number**" in the product master table.

11.3. Register the master data of the spreadsheet you created

Workflow Admin Console > Home > Master Integration > click [**+Add Master Data**]

Add Master Data (a list of spreadsheets in Google Drive) is displayed. Select the **company name master** from it and click [**Add Master Data**].

Add **product category master** and **product master** spreadsheets to the master data likewise.

11.4. Set the Foreign Key to the Registered Master Data

Set foreign keys to the data in each master. Setting a foreign key enables you to link the master data linked items in the application form with other master data when creating them.

Example: To link "**Company Name**" in the company name master with "**Manufacturer Product Number**" in the product master,

➢ you need to link "**Company Name**" in the company name master with "**Company Name**" in the product category master and **Category** in the product category master with "**Category**" in the product master.

For that, register the following:

1. Set a foreign key to "**Company Name**" in the company name master
2. Set a foreign key to "**Company Name**" and "**Category**" in the product category master
3. Set a foreign key to "**Category**" in the product master

Select them and click [**Set Foreign Key**].

<Points to Note When Changing the Master Data in Google Drive Spreadsheets>

When making changes to the master data on a Google Drive spreadsheet, the master data registered on rakumo is not automatically updated.

To reflect changes to the master data on the Google Drive spreadsheet, Click **[Update]** or **[Update All]** displayed for each item to update the information of the sheet registered on rakumo.

12. Management of Lookup Datasource

For lookup items, use the lookup datasource on rakumo created based on the contents of the spreadsheet to enter the items.
Follow the steps in this chapter to create lookup datasource on rakumo for use with lookup items.

12.1. Create a Google spreadsheet for lookup datasource

Use Google Sheets to create a new spreadsheet with only one sheet.

Describe the following contents in one sheet.

・First column of sheet (far left): Value to choose from "Lookup" item * Required

・Second and subsequent columns of the sheet: Lookup datasource classification name (hierarchical name when selecting options are hierarchized) * 1

・Second and subsequent columns of the sheet: Value corresponding to the optional lookup datasource * 2

* 1 Specify only when displaying the options in a hierarchical manner. The order of the hierarchy follows the column order of the sheets.

* 2 Specify only when setting automatic input to other items.

* 3 The order of the columns * 1 and * 2 is arbitrary. The behavior is the same regardless of which one is registered in the previous column.

* 4 Enter any column name in the first row of each column.

* 5 In the spreadsheet sharing settings, give the person who performs the operation to bring the lookup datasource onto rakumo "viewer" or higher. The person who uses the application form does not have to be authorized.

Creation example:

Follow the hierarchy of "Major classification"> "Middle classification"> "Minor classification" and select the "Product category" column as an item option.

In addition, lookup datasource when automatically entering a value for another item with the "category ID" according to the choice.

	A	B	C	D	E
1	Product category	Major classification	Middle classification	Minor classification	category ID
2	spinach	Fruits and vegetables	Vegetables	Leafy vegetables	10101132
3	Komatsuna	Fruits and vegetables	Vegetables	Leafy vegetables	10101144
4	Potatoes	Fruits and vegetables	Vegetables	Root vegetables	10102291
5	Kiwi fruit	Fruits and vegetables	Fruits		10200372
6	Mackerel	Fisheries	Raw fish	Raw fish	20101586
7	Sashimi	Fisheries	Raw fish	Processed raw fish	20102771
8	sliced cheese	Daily delivery	Dairy products	cheese	30201242
9	Seasoned seaweed	Room temperature general food	dry matter	Seaweed	40722198
10	Sake	Liquor / Beverage	Liquors		50100001

For information on how to work with Google Sheets, refer to the following Google Help page.
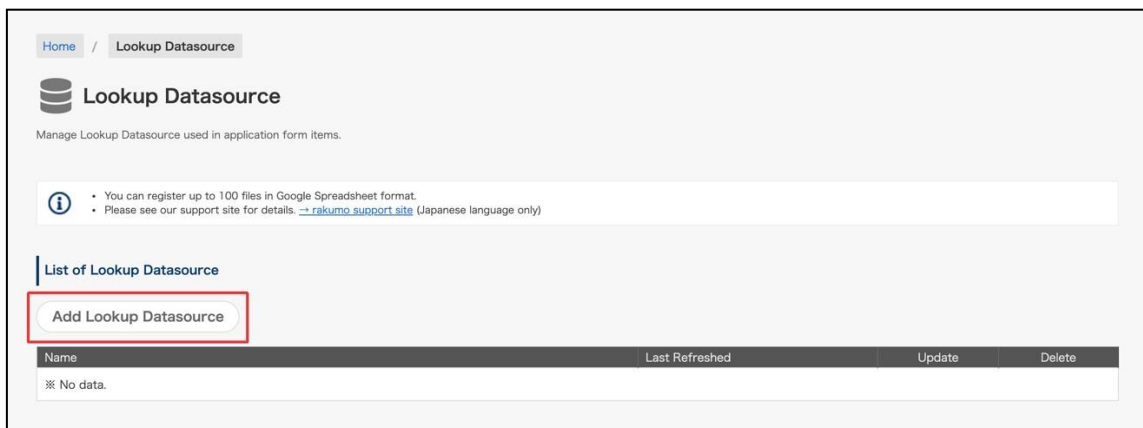
https://support.google.com/docs/answer/6000292/

We have introduced the creation method and precautions on our support site. Please refer together.

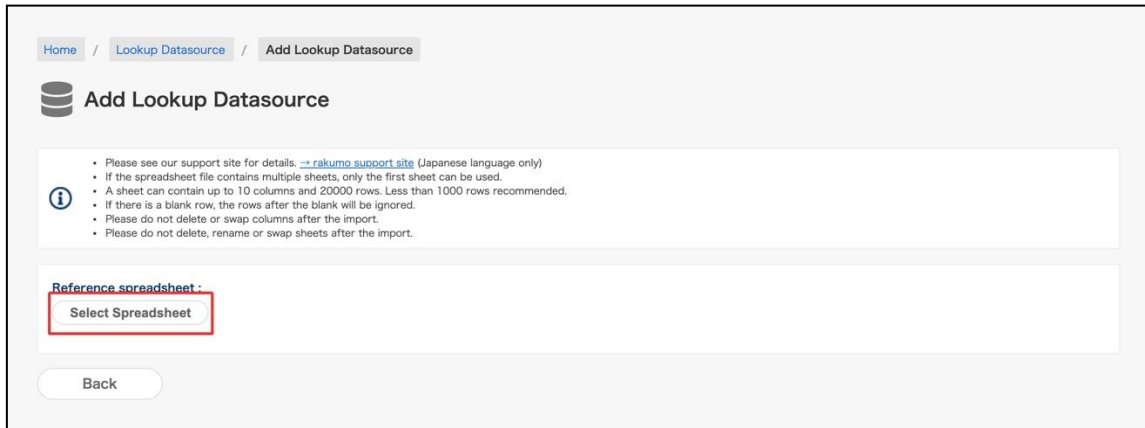https://help.rakumo.com/r/article?site=SH1NFEJ2&category=23&id=472

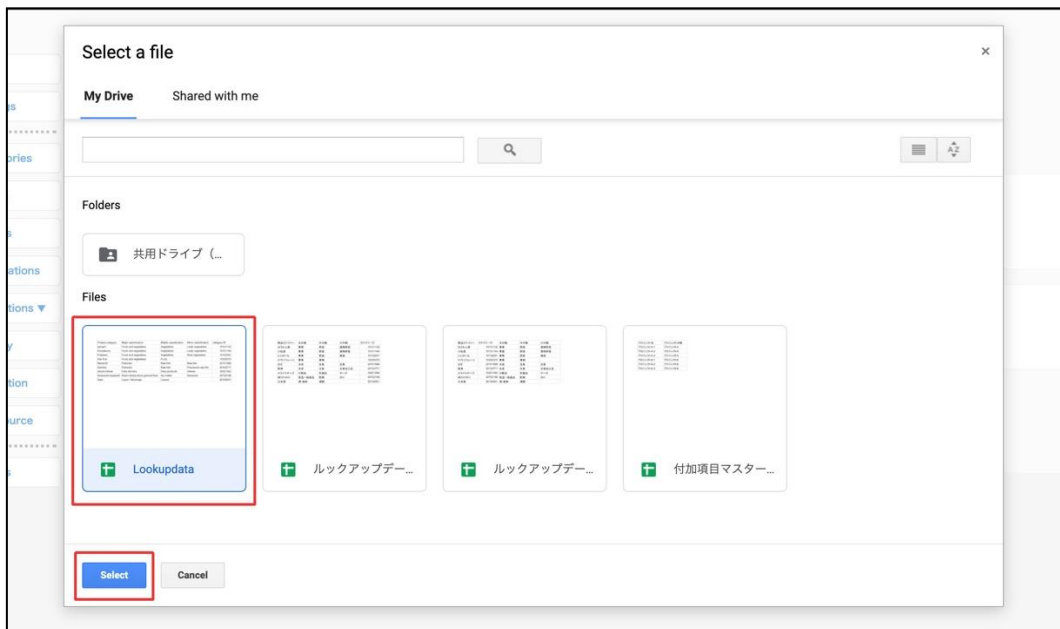## 12.2. Create Master Data in a Google Drive Spreadsheet

1. Access the "rakumo Workflow Admin Console" > "Lookup Datasource" and click "Add Lookup Datasource".
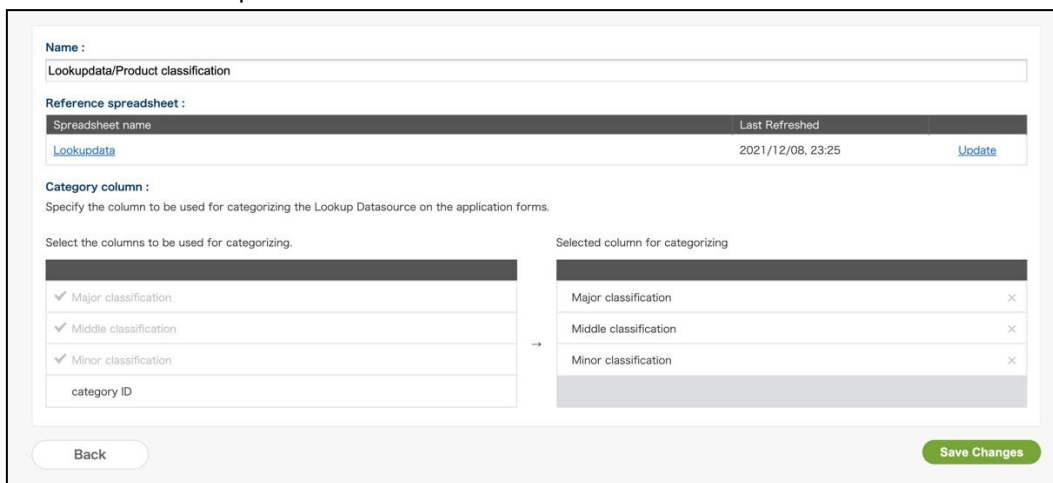

2. On the "Add Lookup Datasource", click "Select Spreadsheet".

3. On the "Select a file", select the file to be registered as lookup datasource from the Google spreadsheet, and then click "Select".

4. Next, set the lookup datasource information.

・Name: By default, "{file name} / {sheet name}" is automatically set.

The value set here is used when specifying the lookup datasource in the list on the "Lookup Datasource" screen or in the lookup item. It can be changed to any value.

・Reference spreadsheet: Displays the Google Sheets name you selected earlier.

・Category column: Specify the columns to use for hierarchization only if you want to hierarchize the choices.

5. Finally, click "Save Changes".

6. When [Updated the Lookup Datasource "{Name}".] is displayed, the setting is complete.

12.3. Update the contents of the registered lookup data

To modify the lookup datasource after registering the lookup datasource, follow the procedure below.

1. Add / modify values in Google Sheets

	A	B	C	D	E
1	Product category	Major classification	Middle classification	Minor classification	category ID
2	spinach	Fruits and vegetables	Vegetables	Leafy vegetables	10101132
3	Komatsuna	Fruits and vegetables	Vegetables	Leafy vegetables	10101144
4	Potatoes	Fruits and vegetables	Vegetables	Root vegetables	10102291
5	Kiwi fruit	Fruits and vegetables	Fruits		10200372
6	Mackerel	Fisheries	Raw fish	Raw fish	20101586
7	Sashimi	Fisheries	Raw fish	Processed raw fish	20102771
8	sliced cheese	Daily delivery	Dairy products	cheese	30201242
9	Seasoned seaweed	Room temperature general food	dry matter	Seaweed	40722198
10	Sake	Liquor / Beverage	Liquors		50100001

    Precautions when editing: The following operations cannot be performed on the spreadsheet after registering the lookup datasource.
   ・Delete and rename the spreadsheet body and sheet
    ・Reordering sheets in a spreadsheet
    ・Delete columns in the sheet and change the column order

2. Update the lookup datasource stored on rakumo to reflect the corrections
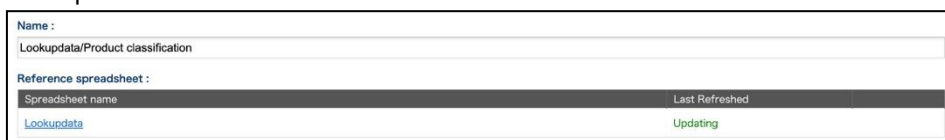
    i.   Access the "rakumo Workflow Admin Console" > "Lookup Datasource".

    ii.   From the "List of Lookup Datasource", click the lookup data name.
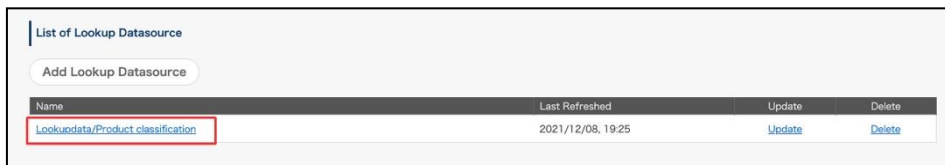
    iii.   Click "Update" Reference spreadsheet.
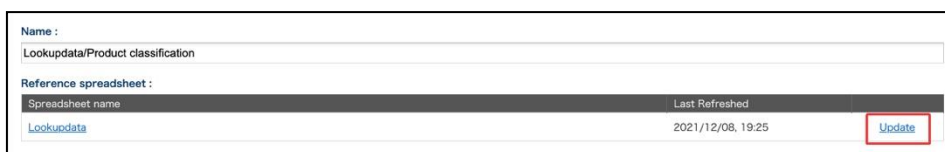
    iv.   The update will start. Please reload the screen after a while.

    v.   When the update is complete, the date and time will be displayed again at the "Last Refreshed".

Name :
Lookupdata/Product classification

Reference spreadsheet :

Spreadsheet name	Last Refreshed	
Lookupdata	2021/12/08, 19:56	Update

vi.　　　(Only if the choices are hierarchized) Hierarchical information is reset when the data is updated.

Specify the classification column again and click "Save Chaneges".

Category column :
Specify the column to be used for categorizing the Lookup Datasource on the application forms.

Select the columns to be used for categorizing.

	Selected column for categorizing
✓ Major classification	Major classification ✕
✓ Middle classification	Middle classification ✕
✓ Minor classification	Minor classification ✕
category ID	

Back　　　　　　　　　　　　　　　　Save Changes

This completes the modification of the lookup datasource.

● Reference information

・If the lookup datasource options are not hierarchized, you can also perform the update operation

from the list on the "Lookup Datasource".

	A	B	C	D	E
1	Product category	Major classification	Middle classification	Minor classification	category ID
2	spinach	Fruits and vegetables	Vegetables	Leafy vegetables	10101132
3	Komatsuna	Fruits and vegetables	Vegetables	Leafy vegetables	10101144
4	Potatoes	Fruits and vegetables	Vegetables	Root vegetables	10102291
5	Kiwi fruit	Fruits and vegetables	Fruits		10200372
6	Mackerel	Fisheries	Raw fish	Raw fish	20101586
7	Sashimi	Fisheries	Raw fish	Processed raw fish	20102771
8	sliced cheese	Daily delivery	Dairy products	cheese	30201242
9	Seasoned seaweed	Room temperature general food	dry matter	Seaweed	40722198
10	Sake	Liquor / Beverage	Liquors		50100001

・If you want to make the changes described in the notes when editing step 1 to the spreadsheet after

registering the lookup data, please consider following the steps below.

1) Delete the lookup datasource once registered.
2) Edit the spreadsheet.
3) Register the lookup datasource again.
4) Respecify the lookup datasource to be referenced in the application form item "Lookup".

13. Check the Log of the Operation Performed on the Admin Console

You can display the logs or download of the work performed on the rakumo Workflow Admin Console.

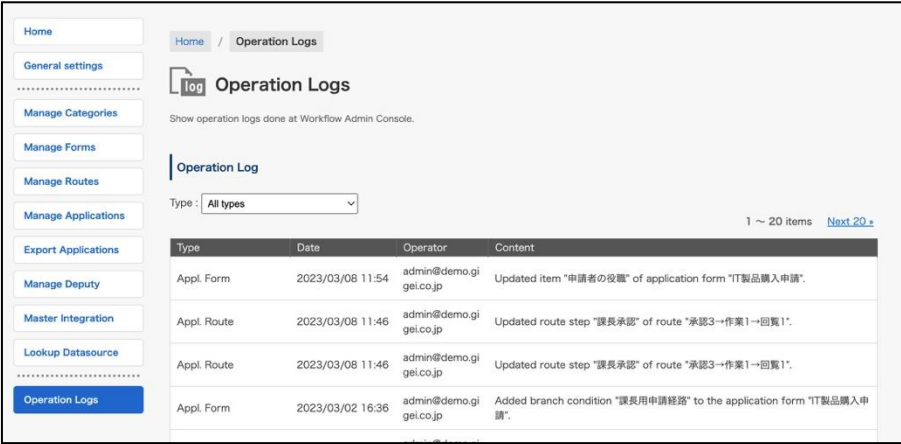You can check the following items.

➢ Type

➢ Date

➢ Operator

➢ Content

13.1. Check the Log of the Operation Performed on the Admin Console

As a work log, you can check the type, date, operator's email address, and operation details.

● How to operate

Access the workflow management screen > Top > Operation Logs to check the logs.

When the page is opened, the logs of all operations are displayed.

If necessary, the logs can be narrowed down to display by type.

[Log Types]

All types: Display the logs of all work.

General Settings: Displays the logs of the work performed on the " General Settings" page.

Appl. Route: Displays the logs of the work performed on the "Manage Routes" page.

Appl. Category: Displays the logs of the work performed on the "Manage Categories" page (except access privileges and operator).

Operators: Displays the work logs on the "Set Operators" page.

Permissions: Displays the work logs on the "Set Access Permissions" page.

Appl. Form: Displays the work logs on the "Manage Forms" page.

Applications: Displays the work logs of applications.

Deputy: Displays the work logs on the "Manage Deputy" page.

Master Integration: Displays the work logs on the "Master Integration" page.

rakumo Expence：Displays work logs related to application templates used in Expence integration.

Post Step Actions：Displays work logs related to post step actions.

Lookup Datasource Integration：Displays work logs related to lookup datasource.

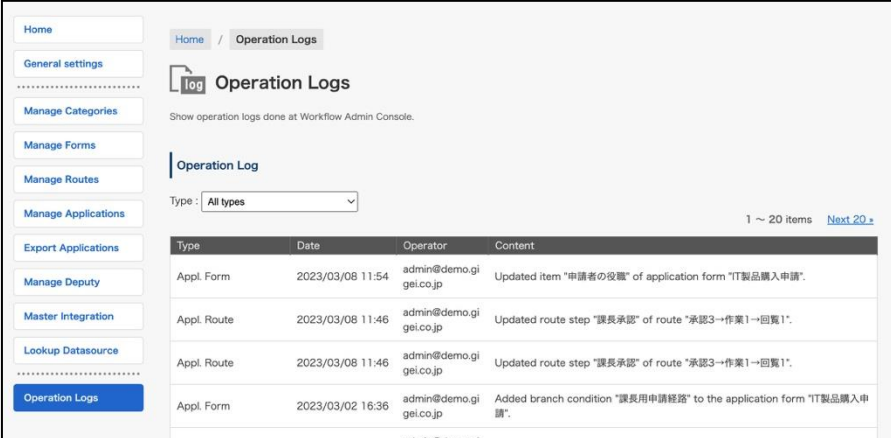## 13.2. output the work log of the Admin Console

You can display the logs or download of the work performed on the rakumo Workflow Admin Console.

In addition to viewing the operation logs on the screen, you can also be exported to a CSV file.

This is useful when you want to output all the operation logs at once for auditing purposes or for long-term storage.

● How to operate

1. Check the Log of the Operation Performed on the Workflow Admin Console.

2. In the "Log Output" section, specify the character code and the period of time to be output, then click "Export".

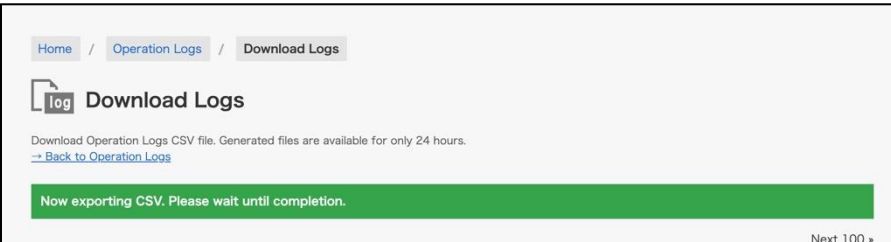3. You will be redirected to the log download page and the CSV file generation will begin.

4. Reload the page.

If the generation is complete, a download button will appear.
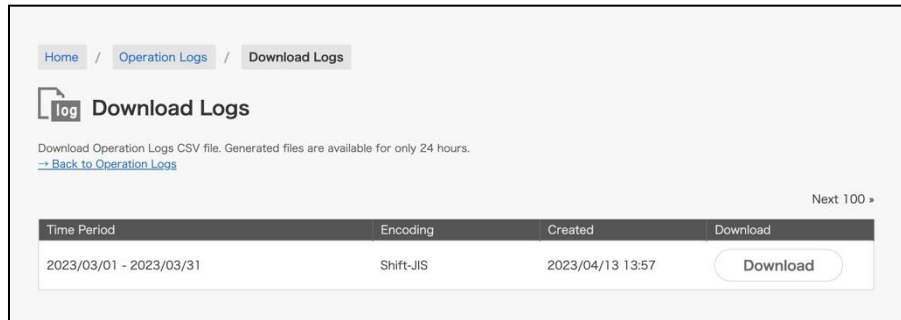
5. Click "Download" to download the file.
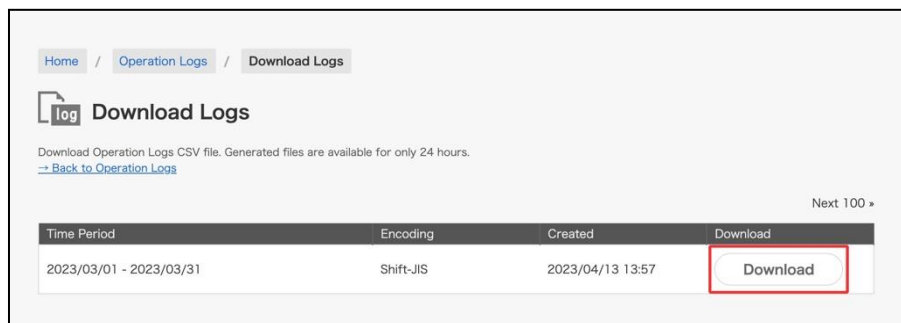
6. Please open the downloaded file and check the log.

- Reference Information

・Only the time period (start and end date) and character code can be specified for output. It is not possible to narrow down the output target cannot be narrowed down by log type.

・The maximum period that can be specified in a single output is 3 months.
If you wish to output work logs for a longer period of time, please generate and download the file multiple times.

・The contents of the output CSV file are identical to the contents of the operation log that can be viewed on the screen.

・Generated CSV files can be downloaded within 24 hours of generation. If you have exceeded the 24-hour period, please perform the file generation operation again to download the file.

・The language and time zone of the output CSV file depends on the personal settings on rakumo of the user who outputs the file.

14. Allow application notifications to be received in Slack

You can allow users to receive various notifications about your application in Slack messages.

rakumo Workflow Admin Console > General settings

Check "Use" of Slack integration and click "Save Changes" at the bottom of the screen.
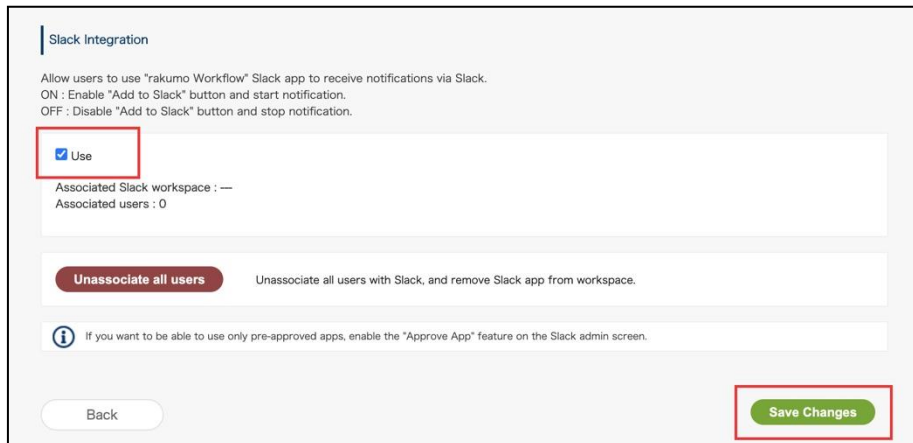
When the Slack integration is enabled by the administrator, the "Add to Slack" button will appear in Personal settings> Workflow settings on the rakumo user screen.
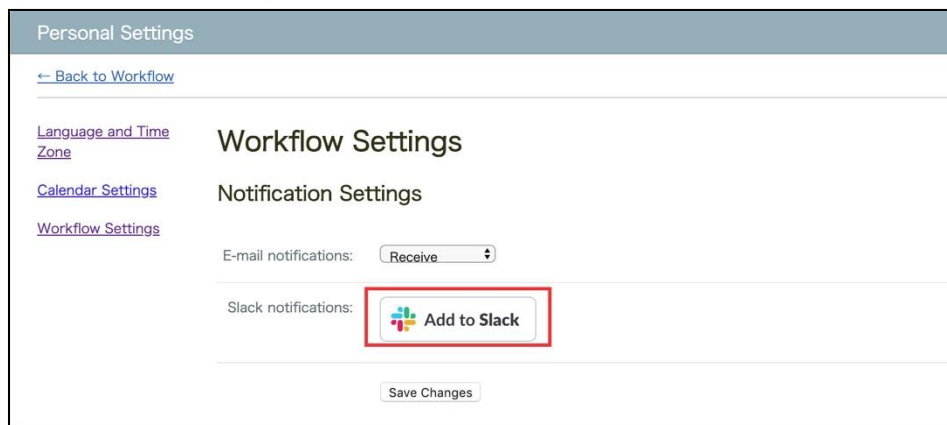
By clicking this "Add to Slack" button, the "rakumo workflow" Slack app will be installed in your Slack environment and cooperation will begin.

* You need to install the Slack app for each user.

* If the administrator of the Slack workspace restricts the installation of the Slack app, it is necessary to set permission to use the app on the Slack side before the user performs the installation operation.

See the slack help page for details.

https://slack.com/help/articles/222386767-Manage-app-installation-settings-for-your-workspace

● About the safety of the Slack app

The "rakumo workflow" Slack application is also listed on the "App directory" of the Slack application list page operated by Slack. Since it has passed the Slack examination, you can use it with confidence.

● Conditions for using this function

In order to use Slack integration function, it is necessary to meet all of the following conditions.

- **You are using both rakumo workflow and Slack.**
- **There is a one-to-one relationship between rakumo users and Slack users.**
  Multiple Slack users cannot be linked to one rakumo user. Also, it is not possible to link multiple rakumo users to one Slack user.
- **All Slack users to be linked must belong to the same workspace.**
  Only one Slack workspace can be linked to one rakumo organization.
  If you have a Slack Enterprise Grid plan, it may not be available company-wide.
  For Slack integration, the Slack workspace of the user who first installed the Slack app is used, and even if users of different Slack workspaces set up Slack integration on rakumo, it will fail with an error. To use it, we recommend that the administrator first install the Slack app and control the workspace used.

● Slack notification target and notification timing

The content and timing of the notification is the same as the previous email notification.

·Applicant:
  Application approval notification, processing completion notification, application return notification, application rejection notification
・Authorizer:
  Application approval application notification, notification that the application was returned from the next process to the process including myself
・ Passer:
  Request to confirm the application

● About appearance on Slack

The notification will be displayed as a message from the app.
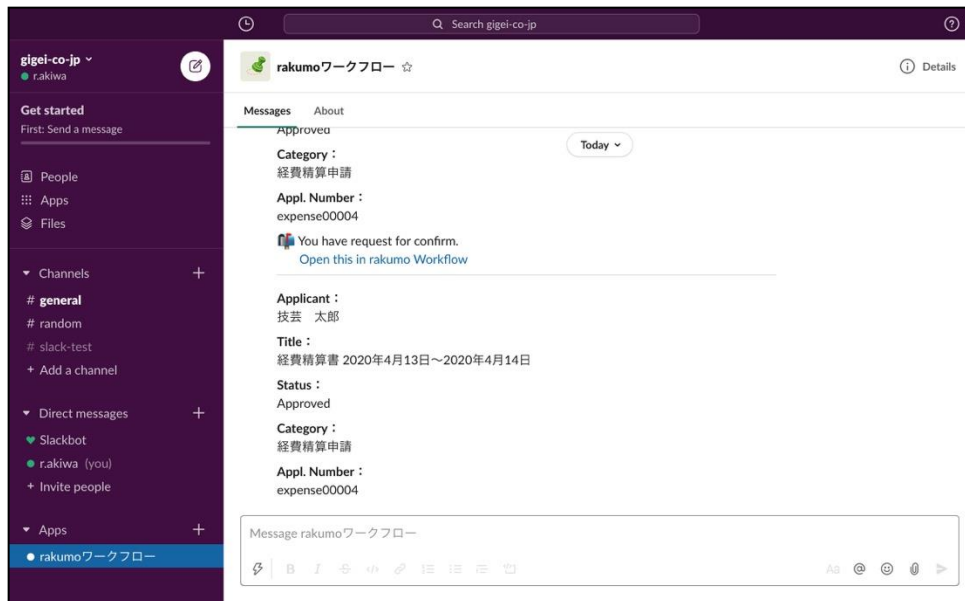
● Check the status of integration with Slack

If the environment and Slack are linked, you can check the linked Slack workspace name and workspace ID, and the number of linked users..
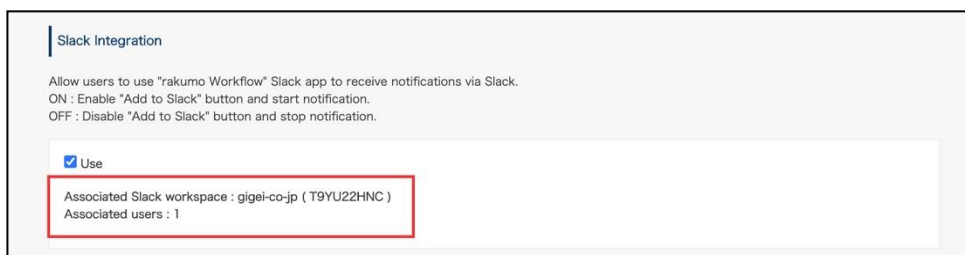
*You can check the Slack workspace name from the Slack subdomain ({workspace name}.slack.com) of the workspace.

* You can check the Slack workspace ID from the URL when you opened the workspace in the web version of Slack. (https://app.slack.com/client/{Workspace ID}/{Channel ID})

Workspace ID is a character string starting with T.

● Cancel Slack integration

You can unlink Slack workspaces that have already been linked, unlink Slack for all users at once, and

delete the Slack app.

To cancel, click "Unassociate all users" and click "OK" in the confirmation dialog.
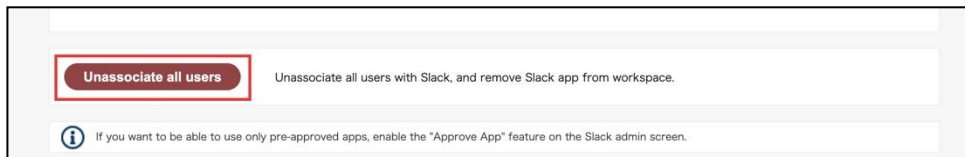
Please use it when the user has linked with the Slack workspace that the administrator did not intend, or when you want to change the Slack workspace of the linked destination.

* Please note that all users who want to use Slack integration will need to re-install the Slack application after canceling all the integration settings.

15. Send a reminder email about unapproved, unoperated applications

You can set to automatically send a reminder email once a day to users who have unapproved or unoperated applications.

Workflow Admin Console > General Settings

Select [**Enable**] of the **Reminders** and select the **Send Time**. The sending time can be specified in units of 1 hour.

Then click [**Save Settings**] at the bottom of the screen to save the changes.

Tips

- **A reminder email will be automatically sent to the user only if there is an unapproved or unworked application form. The reminder email will be sent at the specified "send time". No reminder emails are sent for unchecked application forms.**

- This setting applies to all users in the domain. Users who do not need Reminder Email can change their settings so that they do not receive Reminder Email. To change the settings, go to User Screen> Personal Settings> Workflow Settings.

For details, refer to "Workflow User Manual" ⑳ Setting the notification method.（Japanese notation only）

16. Set Default Print Type

You can change the print format when pressing the 'Print' button.

Workflow Admin Console > General Settings

Select Type of the **Default Print Type** > click [**Save Changes**].

The user can print a written application form on the user's screen.

Applications will be printed in a type that has been set here, when you push the 'Print' button.

As well as a set either, you can choose both types from the side of 'Print' button.

17. Set Default Follow Status

You can change the default follow status of the application form follow-up function at the time of application/approval.

By changing the default values, you can reduce the number of notifications to applicants and increase the content of notifications to approvers..

To change the default value, perform the following operations.

rakumo Workflow Admin Console > General settings

Change the selection state of [Default follow status] and click "Save settings".

<Reference information>

- The default settings are as follows.

   ・ Time of application : follow (checked on user screen)

   ・ Time of approve : Do not follow (not checked on the user screen)

- Even with this setting, you cannot change the default follow status at the time of done, and confirmation. The default follow status at the time of done, and confirmation remains Off (Do not follow).

- If you change the default value of "Time of approve" to ON, the number of notifications sent to approvers will increase. If you have a large number of application forms to process, set this carefully.

- This setting is not a setting that disables the follow function itself. Even if the default value is changed to "Do not follow" in this setting, the user can follow any application form at the time of application/approval.

18. Set Gadgets

You can display rakumo Workflow gadgets on Google Sites.

rakumo Workflow Gadgets on Google Sites

rakumo Admin Console Homepage > Gadget Settings

Use the URL provided on rakumo Workflow for Google Sites.

For settings, >> download a manual from Download Manual (PDF) and configure the settings.

19. Set the file viewing method when using the local file attachment function

You can set the viewing method of the file attached to the "File attachment field" item (*).

* This item is an optional feature. To use it, you need to subscribe to the local file attachment option.

This setting applies to all application forms in the domain.

The viewing methods that can be set are the following three patterns.

■ **Download directly (Default)** .... When viewing a file, download it to your device and browse the file.

所属部署	営業本部第一営業部
入社日	10/1/2020
入社日 出社時刻	9:30
履歴書	小林愛美 履歴書.pdf
備考	(did not entry)

- Click the file name to download the file to your device.

■ **Browse on Google Drive** .... You can use the features of Google Drive to browse the contents of the file without downloading the file itself.

名前（ローマ字）	Kobayashi Manami
所属部署	営業本部第一営業部
入社日	10/1/2020
入社日 出社時刻	9:30
履歴書	小林愛美_履歴書.pdf Open in Google Drive
備考	(did not entry)

- When a user uploads a local file when applying for a workflow, a temporary file is also created in the Google Drive folder specified by the administrator.

- When the user clicks "Open in Google Drive" from the workflow application screen, this temporary file is opened in a web browser instead of downloading the file. Only users who are included in the application route of the application form can see the temporary file.

- If the temporary file does not exist at the time of viewing request, the temporary file is automatically recreated. If you do not have permission to view the temporary file at the time of viewing request, grant viewing permission.

- Temporary files are set to "Prohibit copying, printing, and downloading by anyone other than the owner."

- Temporary files are automatically deleted 30 days after they are created or when the application form is deleted, so no maintenance work is required.

■ **Both** .... Make both "Download directly" and "Browse on Google Drive" viewing methods available.

<Setting method>

* This setting can only be performed by Google Workspace super admin or rakumo admin.

Check the display method to be used in the file viewing method section of rakumo Admin Console > workflow settings >Local File Attachements.

If you set "Browse on Google Drive" or "Both" as the viewing method, <u>you need to set the save destination on Google Drive in addition to selecting the viewing method.</u>

Click "Specify a folder", select the destination folder, and then click [Save].

You may set Google Drive folder for storing files temporarily:

Folder name	Specify a folder	一時保存フォルダ	Reset selection
Administrator name	吉沢 太郎		
Administrator email address	admin@rakumo.cloud		

Save

-The information of the user who specified the folder is automatically set in the "Administrator name" and "Administrator email address".

-To create or delete temporary files and grant file viewing authority, use the authority of the administrator who specified the folder for the temporary file storage. The owner of the temporary file is also this administrator.For this reason, we recommend that you specify a folder owned by the user in charge of settings as the save destination.

Attention

- Depending on the file format, you may not be able to preview on Google Drive (the file format is not selected according to the support status of the preview function). We strongly recommend that you test whether the file format you expect to attach can be previewed in Google Drive before deciding how to open the file.

- The PDF file of the expense report attached to the application form when linking with rakumo Expense does not support this function. Always download PDF files regardless of settings. Please note.

- Please be careful when changing the access right of the folder specified as the temporary file storage, or when changing the authority of the administrator who set the save destination or deleting the account.

- If the temporary file creation fails, no error message will be displayed.

20. CloudSign Integration

You can link the rakumo workflow with the electronic contract service "CloudSign" operated by Bengo4.com,Inc.
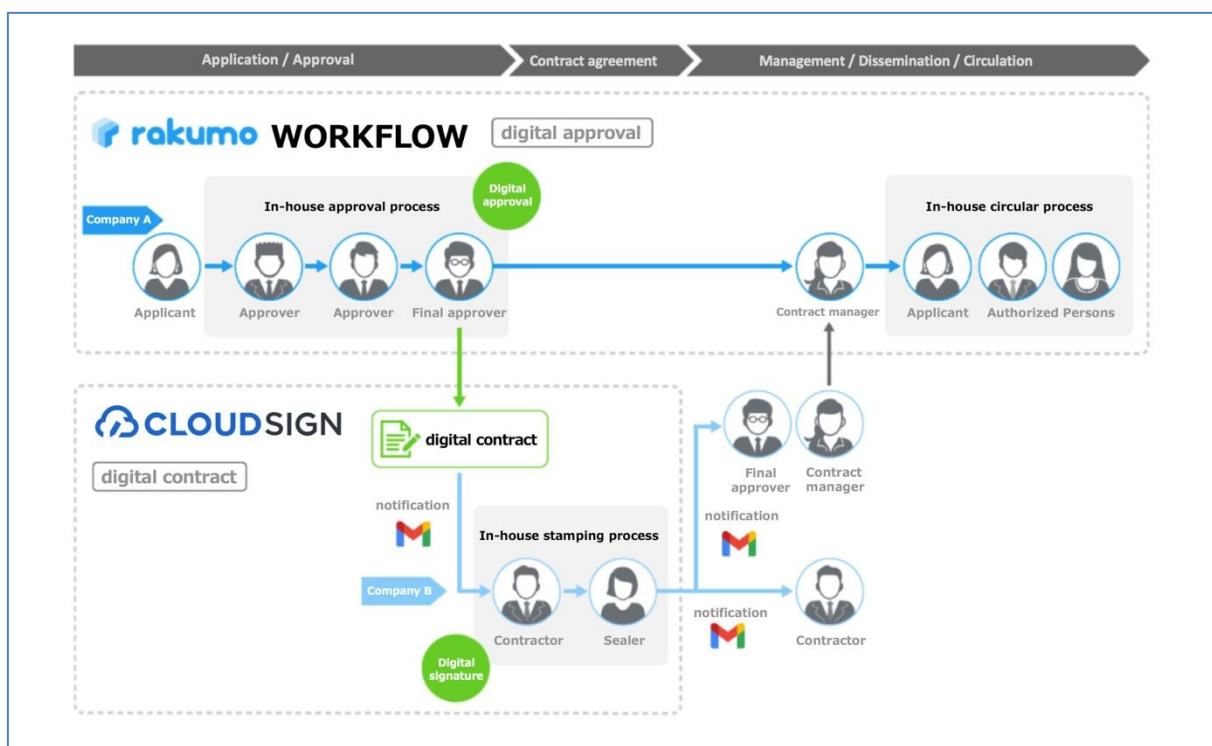
20.1. Overview of CloudSign Integration

● What you can do with CloudSign Integration

By linking CloudSign and rakumo workflow, it is possible to attach a contract to the workflow application and send a contract confirmation request email to the specified address when the application approval is completed.

By using the CloudSign Integration, it is possible to attach a contract to the workflow application and send a contract confirmation request email to the specified address when the application approval is completed.
So, you can save the trouble of uploading the contract and posting the recipient information on the CloudSign after the application is approved.

● Flow and cooperation image from application to contract conclusion and internal dissemination

1. Apply using the rakumo workflow.

2. The final approver of the In-house approval step approves the application.

3. At the timing of 2, the digital contract will be sent by the CloudSign integration action.

4. An e-mail requesting consent to the digital contract will be sent to the other party from CloudSign.

5. the person in charge of the other party confirms the contract details on the Cloudsign page and agrees.

6. The contract conclusion will be notified by e-mail to the person in charge of contract operations and the person in charge of the other party from CloudSign.

7. When you receive the agreement conclusion notification, click "Done" in the Operation step.

8. The application form will be sent to the in-house publicity step. Inform internal parties of the conclusion of the contract.

● What you need to use the CloudSign Integration

- ・ [Required] Rakumo workflow license (* 1)
- ・ [Required] CloudSign usage contract (* 2)
- ・[Required] CloudSign WebAPI Client ID (* 3)
- ・ [Recommended] Cloud sign sandbox environment (* 4)

* 1 An optional contract for rakumo workflow is not required to use the CloudSign Integration. It can be used only with the license fee.

* 2 The cloud sign linkage function uses the cloud sign WebAPI. Therefore, it is necessary to subscribe to a plan that can use the cloud sign API and apply for the API option (free of charge)..

* 3 The person in charge of the step that executes the linkage action (e.g. contract conclusion authority, contract clerk) must obtain the WebAPI client ID on the CloudSign side and set the linkage in the personal settings of the workflow.

* 4 It is strongly recommended to use the CloudSign sandbox environment when testing the application to avoid pay-as-you-go charges when testing the application.

From the next page, we will show you how to set up to use CloudSign Integration.

20.2. Preparations on the CloudSign side

First, prepare to work with the rakumo workflow on the CloudSign side.

● **preparation 1. Sign up for a plan that can use the cloud sign API**

Since WebAPI is used for linkage, please subscribe to a plan that can use WebAPI.

If you have not subscribed to CloudSign, please refer to the CloudSign support site below and apply.

▼ 有料プランの申し込み方法 | クラウドサイン ヘルプセンター（Japanese notation only）

https://help.cloudsign.jp/ja/articles/385305

● **Preparation 2. Obtain a cloud sign sandbox environment**

● **Preparation 3. Enable CloudSign WebAPI**

Click the "?" Button at the bottom right of the management screen and apply for WebAPI activation from chat.

It is possible to request the provision of a sandbox environment together with the application for WebAPI activation.

For detailed information on the process of enabling WebAPI and the sandbox environment, refer to the CloudSign support page below.

▼ クラウドサイン Web API 利用ガイド | クラウドサイン ヘルプセンター（Japanese notation only）

https://help.cloudsign.jp/ja/articles/2681259

● **Preparation 4. Add members who have the authority to conclude a contract and a user for testing**

Add members to both the production and sandbox environments.

Register the contract conclusion authority (generally the company president, etc.) in the production environment and the test user in the sandbox environment.

Please refer to the CloudSign support page below for member addition operations.

▼ メンバーや管理者を追加/削除する | クラウドサイン ヘルプセンター（Japanese notation only）

https://help.cloudsign.jp/ja/articles/385226

● **preparation 5. Add clerical staff as members and grant document management authority**

Please register with "Document Management Authority" set to "Yes" so that the clerical staff can receive the agreement conclusion notification email from CloudSign and report the situation on the workflow.

Please refer to the CloudSign support page below for member addition operations.

▼ メンバーや管理者を追加/削除する｜クラウドサイン ヘルプセンター（Japanese notation only）

https://help.cloudsign.jp/ja/articles/385226

20.3. Preparations on the rakumo workflow side

20.3.1. Set the application form

Prepare the following 5 input items required for sending an email with cloud sign in the application template that uses cloud sign linkage.

- ● Document Title to Send
  - ➢ Select the item type "Text Input" to create.
- ● Item of Files to Send
  - ➢ Select "Drive File Attachments" or "File Attachments" as the item type to create.
  - ➢ Check "Limit the file types that can be attached" and specify the type of files that can be attached as "PDF".

    <Example of creation in "Drive File Attachments">

- ● Item of recipient (= Contractor of the other party) Email Address
  - ➢ Select the item type as "Email Address Input Field" and create it.
- ● Item of recipient (= Contractor of the other party) Name
  - ➢ Select the item type "Text Input" to create.
- ● Item of recipient Company Name
  - ➢ Select the item type "Text Input" to create.

For how to add items to the application template, refer to **6.4. Register Application Form Items.**

20.3.2. Set the application route

Next, set the approval / operation / circulator step in the application route.

For how to create an application route, refer to **7. Set an Application Route.**

As a general rule, there is no problem if you create the application route according to the internal operation.

However, please note the following points.

✓ We recommend that you create a route step that includes the account of the person who has the contract conclusion authority so that the cloud sign linkage action can be executed by the account of the person who has the contract conclusion authority.

   If you specify multiple recipients and send in the order of "company's contract clerk → company's contract conclusion authority → contract partner's contract conclusion authority", create a route step that includes your contract clerk's account.

✓ Create a route step that includes users with "document management privileges"(Users with "document management authority" in CloudSign) in CloudSign so that person in charge can report the situation on the workflow.

<Route creation example>

・ Approval step: Approval of superior ・ Approval of president

・ Operation step: Execution of digital contract ・ Completion report of execution of digital contract

   → The "Execution of digital contract" step includes the contracting authority (in the example, the president). Perform a CloudSign integration action after this step.

   → The "Completion report of execution of digital contract" step includes the clerical staff who set "Document management authority" in Preparation 5.

・ Circulation step: Circulate to the applicant

If you have created a "shared route", please link it to the application form after creating the route.

Please refer to "**6.5 Setting a shared route in the application form**" for how to link to the application

template.

20.3.3. Add CloudSign Integration action

After setting the application form and application route, add "action" to the route step.

● What is "action"?

It is a function that executes a fixed process when a certain step is passed.

After setting the application template and application route, select and set the action to be used.

● Preparation: Enable actions feature

In the initial state, actions feature is in the "disabled" state.

Please enable it as a Google Workspace privileged administrator or rakumo administrator before making the settings.

<Screen to operate>

rakumo Admin Console > Workflow Settings

https://a-rakumo.appspot.com/admin/settings/workflow

<How to enable actions feature>

1. Go to rakumo Admin Console > Workflow Settings.
2. Check Enable in the Post Step Actions Feature section.

3. Check "CloudSign Integration Action".

4.   Click "Save".

This completes the activation of actions feature.

Then set the action.

● Set CloudSign Integration action

Let's set the CloudSign Integration action on the detail screen of the application form.

We will specify "which item of the application form and which route step should be used to CloudSign Integration.

<Screen to operate>

rakumo Workflow Admin Console > Manage Forms

https://a-rakumo.appspot.com/workflow/admin/appform/

<How to enable actions feature>

1. Access rakumo Workflow Admin Console > Manage Forms and open the application form details screen linked with CloudSign.

2. Click Add Post Step Action in the Details for Appl. Route section.

3. In the pull-down menu in the Select Action Type section, select CloudSign Integration.

Home / Manage Forms / The Details of "電子契約締結申請" / Add Post Step Action

⚙ **Add Post Step Action**

Set the action to be taken when each step of the application form "電子契約締結申請" is finished.

Select Action Type

Select the type of action to be executed when a step is finished.

✓ (Select action type)
CloudSign Integration

4. At the bottom of the page, the "Exection Settings of "CloudSign Integration"" section is displayed.

5. Enter Action Name. (* 1)

Exection Settings of "CloudSign Integration"

Send attachments of the application to your customers or business partners using the CloudSign Web API.
Please specify the item to be used for sending to the CloudSign from the items of the application form.

Action Name (20 characters or less)

CloudSign Integration

6. In "When to Execute an Action", select which route step processing should be completed when the action is executed. Specify the step according to the operation.(* 2,3)

    For example, a step that includes a contract conclusion authority (when only one recipient is used) or a step that includes a user who is the sender of documents with a cloud sign (when using multiple recipients and specifying a contract conclusion authority as the recipient) etc.

When to Execute an Action

Takes an action when the selected step finished.

Application Route Step   電子契約の実行   ▼

7. In "Document Title to Send", select the item you want to use as the title of the document you send with CloudSign. (*5)

Document Title to Send :

Select the application form item (Text Input) to be used for the title of the document to be sent to CloudSign.

送信する書類のタイトル ▼

8. In "Item of Files to Send", select the item to enter the document to be sent by CloudSign. (*6)

Item of Files to Send :

Select the application form item (File Attachments) to be used for the file to be sent to CloudSign.
Only PDF files can be sent.

送信するファイルを入力する項目 ▾

9. Set the "Recipient". The recipient can be an application item or a fixed value.
    After selecting the recipient specification method, enter the required information. (* 8, 9, 10)

    A. When selecting "Application Form Items"
    ・ In " Email Address", select the item to enter the e-mail address of the recipient (= the person who
       has the authority to conclude the contract of the other party) to send the document with the
       CloudSign. (*7)
    ・ In " Name", select the item to enter the name of the recipient (= the person who has the authority
       to conclude the contract of the other party) to send the document with CloudSign. (*5)
    ・ In "Company Name:", select the field for entering the company name of the recipient to which
       you want to send documents with CloudSign. (*5)

    Recipient 1 :

    Please set the recipients to send the documents with CloudSign (up to 3 recipients).
    Either the value of the application form items or the fixed value can be used.

    Values to use: ◉ Application Form Items ○ Fixed Values
    Email Address: 送信する宛先メールアドレス   ▾
    Name: 送信する宛先の名前   ▾
    Company Name: 送信する宛先の会社名   ▾

    B. When selecting "Fixed Values"
    ・ Enter "Email Address", "Name", "Company Name".

    Recipient 1 :

    Please set the recipients to send the documents with CloudSign (up to 3 recipients).
    Either the value of the application form items or the fixed value can be used.

    Values to use: ○ Application Form Items ◉ Fixed Values
    Email Address: rakumo@demo.gigei.co.jp
    Name: 楽雲拓也
    Company Name: 楽雲株式会社

    <Setting example>
    ・ Recipient 1 = [Fixed Values] Company contractor
    ・ Recipient 2 = [Fixed Values] Representative director of the company (contract conclusion
       authority)
    ・ Recipient 3 = [Application Form Items] Contractor who has the authority to conclude a contract

10. In "Send Documents to Recipients", select the behavior when linking with CloudSign. (*11)

    If you want to send directly to the other party when executing the action, check it.

    If you want to save the draft on the CloudSign when executing the action, do not check it.

11. Finally, click "Add Action"

This completes the action settings.

When the settings are complete, the set actions will be displayed in "Details for Appl. Rout" on the details screen of the application form.

*1 "Action name" is displayed at the execution position on the route.

*2 For candidates, the steps of the application route linked to the application form are displayed in a list. For details of each step, see "Steps of Appl. Route" at the bottom of the page.

*3 When the processing in the step selected in "When to Execute an Action" is completed, the action is automatically executed. The sender email address when performing the action is the email address of the processor of the selected step.

*5 Of the application form items, only items whose item type is "Text Input" can be selected.

*6 Of the application template items, only items whose item type is "Drive File Attachments" or "File Attachments" can be selected.

*7 Of the application template items, only items whose item type is "Email Address Input Field" can be selected.

*8 You can set up to 3 recipients. The recipient information of the "Cloud Sign Linkage" action set before the update on March 14, 2022 will be treated as "Recipient 1" after the update on March 14, 2022. If you do not need Recipient 2 or Recipient 3, select "Do not use" as the [Values to use]. In addition, please refer to the following reference information for the delivery order and behavior at the time of delivery.

*9 Application form items and fixed values cannot be mixed and used for one recipient. (Example that

cannot be set : fixed value for email address, refer to application form for name and company name)

*10 When setting the recipient e-mail address with a fixed value, you cannot enter an e-mail address that has already been set for another recipient. (Because of the specifications of the cloud sign, documents cannot be sent if the recipient email address is duplicated)

*11 If you uncheck "Send Documents to Recipients" and save the draft on the CloudSign, you can move to the "draft" of the CloudSign from the link displayed in the execution position on the route and send it manually.

- Reference information: Sending order of recipients and behavior at the time of sending
  - The order of recipient 1 → recipient 2 → recipient 3 on the cloud sign linkage action setting screen is the same as the order of document transmission on the cloud sign.
  - Recipients in which all the items (email address, name, company name) that make up the recipient are blank are skipped. If no recipient is valid, the action will fail.
  - If the email address is duplicated between the recipient who uses the application form item and the recipient set with a fixed value, the action will fail.

20.3.4. Link the workflow account with the client ID of the CloudSign

By associating the account of the rakumo workflow of the person (contract conclusion authority) in charge of the step that set the action with the WebAPI client ID of CloudSign, the set action can be executed.

\<Screen to operate\>

rakumo Workflow（User screen） > Personal Settings > Workflow Settings

https://a-rakumo.appspot.com/workflow

\<How to get and link client ID\>

Please refer to the chapter **" ㉑ Linking with CloudSign" in the "rakumo Workflow User Manual"**.(Japanese notation only)

● Reference information

・Select whether to set the connection destination environment to the sandbox environment or the production environment on the above screen.

・If you have a plan that can use the cloud sign API and you cannot find the API client ID, you may not have applied for the API option (free). Click the "?" Button at the bottom right of the CloudSign management screen and apply from chat.

・Please note that the processer of the step for which the action is set cannot finish the process of the step until this setting is made. (When executing the process, an error message indicating that the CloudSign Web API client ID has not been set is displayed, and the approve / done / confirm operation is not completed.)

・Since the account of the person(contract signing authority) in charge of the step that set the action uses the CloudSign API, the applicant and other approvers do not need to register the CloudSign WebAPI client ID.

20.4. Test in a sandbox environment

Let's test the application in cooperation with the CloudSign sandbox environment.

We strongly recommend that you use the sandbox environment when testing your application, as CloudSign will charge you when you send the document to the contractor.

● Connect with sandbox environment

1. The contracting authority obtains the Web API client ID in the CloudSign sandbox environment.

2. Link from rakumo workflow user screen > personal settings of the person(contract conclusion authority, etc.) in charge of the step for which the action is set.

　　・"Client ID"：Paste the Web API ID of the client sandbox environment obtained in 1.

　　・"Sandbox": Please check.

For a detailed operation image, refer to the chapter "㉑ Linking with Cloud Sign" in the "rakumo Workflow User Manual".（Japanese notation only）

● Test your application

In order to confirm the operation of cooperation, let's actually check the flow from application to notification of agreement conclusion.

1. First, try the flow from application to agreement conclusion notification with the setting to save the draft (when the action "Send Documents to Recipients" is not checked).

2. After that, change the setting to direct transmission (the action "Send Documents to Recipients" is checked) and try the flow from application to agreement conclusion notification again.

As mentioned above, we recommend that you try both linked action actions before deciding which linked action to use during production.

20.5. Switch to production environment and go live

After testing the application, switch the connected environment to the production environment.

● Connect with the production environment

1. The contracting authority obtains the Web API client ID in the CloudSign production environment.

2. Link from rakumo workflow user screen > personal settings of the person(contract conclusion authority, etc.) in charge of the step for which the action is set.

・"Client ID"：Paste the Web API ID of the client production environment obtained in 1.

・"Sandbox": Please uncheck it.

● About billing timing

With CloudSign, you will be charged when you send the document to the contractor.

Therefore, the timing differs depending on whether or not "Send Documents to Recipients" is checked in the action settings.

・ When set to "Direct transmission":

→ An email will be sent to the contract partner at the same time as the action is executed, and you will be charged.

・ When set to "Save as draft":

When the action is executed, it is saved as a draft on the CloudSign side, so you will not be charged at the time of executing the action.

→ After that, if you log in to the cloud sign screen and manually send the draft document, you will be charged.

● Precautions for use

・Please make sure that the contract is concluded with both authority signers included on the CloudSign.

   ➢ In order to satisfy the above, please execute the cloud sign linkage action with the account of the person who has the contract conclusion authority, or set the recipient to include the person who has the contract conclusion authority.

      ✧ (Example) Set an action in the step of the president's approval and connect with CloudSign with the president's client ID

      → It will be sent to the other party in the name of the president via the CloudSign.

   ➢ Please note that if a clerical person who does not have the authority to conclude a contract becomes the sender, the validity of the digital contract will be weakened.

> ➢ Even within the company of the other party, please transfer it to the person who has the authority to conclude the contract and ask for consent.
>> ✧ Use the CloudSign forwarding function and avoid forwarding the email itself.
>> ✧ Forwarding the email directly will weaken the validity of the digital contract.

・When using this linkage function, unlike the default value (*) on the CloudSign side, it is set to allow forwarding of consent requests.

> ➢ By using this linkage function, the sent documents can be transferred by the other party.
>> ✧ Even if the person in charge of the contract partner (a person who does not have the authority to conclude a contract) receives it, you can conclude an electronic contract by having the person in charge of the contract partner transfer it to you.
> ➢ (*) The permitted value of the cloud sign is "Do not transfer".

● Restrictions on use

Currently, with the CloudSign Integration function, it is not possible to use some functions on the cloud sign side or update workflow information in conjunction with the situation on the CloudSign side.

× Among the functions on the CloudSign side, those that cannot be used from rakumo workflow linkage

・ Template function

・ User-defined items

・ Send documents in languages other than Japanese (English, Chinese)

> ➢ When linking, the language of the email sent from CloudSign to the specified destination will be "Japanese". If you set the action when linking from the workflow to "Save as draft", you can open the document saved as a draft on CloudSign, change the language, and send it.

・ Approval function (Enterprise plan)

・ IP address restriction function (Enterprise plan)

・Document information other than the title

> ➢ Document information refers to additional information that can be saved along with the document to be sent. Of the document information, the only items linked from the workflow are "Title" and "Administrative title".
> Please refer to the cloud sign help page for the details of the document information items.
>> ▼ 書類情報を入力する｜クラウドサイン ヘルプセンター（Japanese notation only）
> https://help.cloudsign.jp/ja/articles/1436680

✕ What you can't do on the rakumo workflow side

・ When an agreement is reached on the cloud sign, the next step is automatically taken.

・ When a rejection occurs on the cloud sign, the workflow is remanded in conjunction.

・ Cancel the cloud sign document transmission in conjunction with the workflow remand

・ After the agreement is reached, the documents with the digital signature and the agreement conclusion certificate are obtained from the CloudSign and automatically imported into the rakumo workflow side.

● Reference information

・If the action execution fails, you can process the step and execute the action again.

　If the execution of the action fails, the Approval, Done, and Confirm of the step will fail, and the state before Approval, Done, and Confirm will be restored.

・PDF files that can be sent using the CloudSign Integration are subject to the same restrictions as the format, size, and number of files on the CloudSign side. Pay particular attention to size restrictions.

✧　Format restrictions on the CloudSign side

✓　PDF version 1.4-1.7

✓　Not yet digitally signed

✓　The contents of the file are not empty

✓　No password is required

✧　Size limit on the CloudSign side

✓　Up to 10MB (= 10,485,760 Bytes) per file

✓　Up to 50MB (= 52,428,800 Bytes) in total for all files

✧　Limit on the number of files on the CloudSign side

✓　Up to 100 files per document

・　The appearance of the action on the timeline display of the application form is as follows.

Before executing the action:
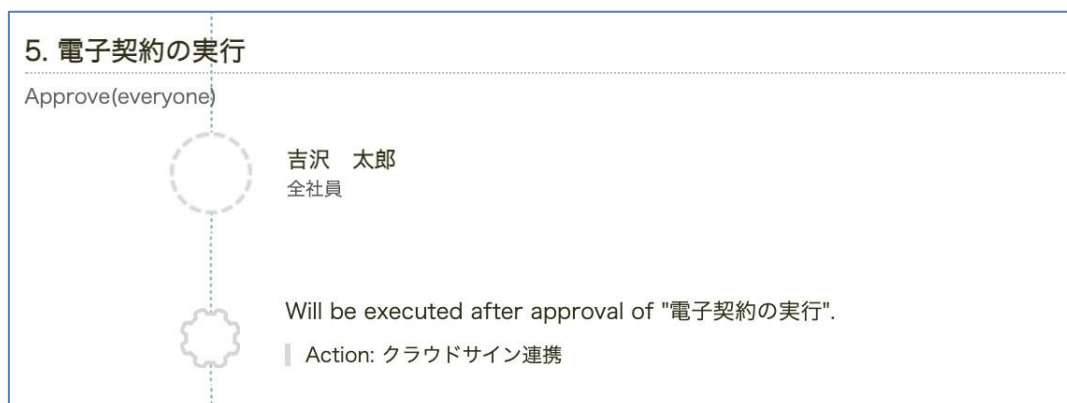
After executing the action:

・ After the agreement is reached, the electronically signed documents and the agreement conclusion certificate will be saved on the CloudSign side. Therefore, it can be downloaded from the CloudSign management screen.

21. Set the Webhook Action

21.1. Webhook Action Overview

When you go through a step, you can send a webhook from your rakumo workflow to an external system.

● What you can do with a Webhook Action

Send JSON-formatted data over the HTTPS protocol with the POST method.
For example, you can use it as follows.

・Trigger a webhook to send a message to any channel in Slack

・Take a webhook as a trigger to run another system in the company

● What is an action?

It is a function that executes a fixed process when a certain step is passed.
After setting the application template and application route, select and set the action to be used.

● What is a webhook?

It is a mechanism to notify other systems that an event has occurred on one system (website).
A type of web API whose primary purpose is to notify events between systems.
It must be sent in the JSON format specified by the receiving service, and in principle coding is required.
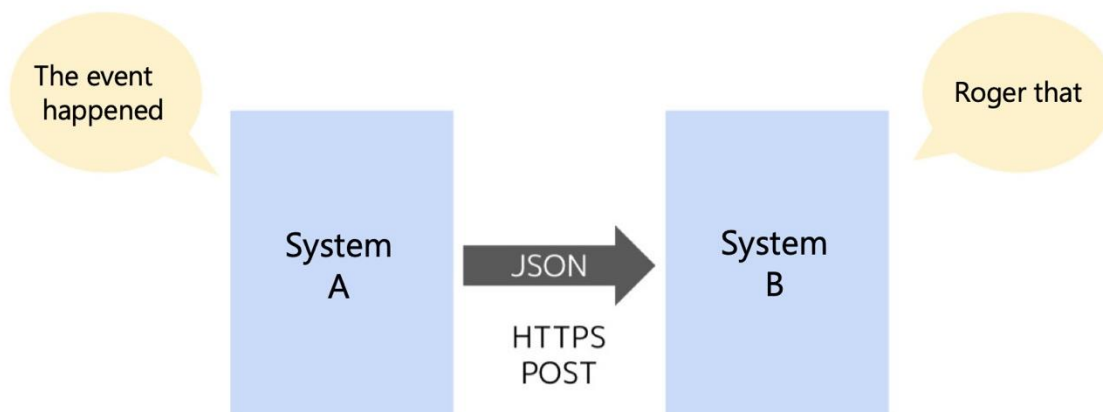
21.2. Basic specifications for webhook action

● **Send the following HTTPS (SSL) POST request to the preset destination URL.**

▼ HTTP header

```
{
    'Content-Length': '(Body size)',
    'User-Agent': 'python-requests/2.27.1',
    'Accept': '*/*',
    'Connection': 'keep-alive',
    'Content-Type': 'application/json',
    'Accept-Encoding': 'gzip, deflate'
}
```

▼ HTTP request body

```
{
    "appUser": "Applicant",
    "appUserEmail": "Applicant email address",
    "title": "Subject of application",
    "statusText": "Status of application",
    "name": "Application form name",
    "appNumber": "Application number",
    "id": "Application ID",
    "link": "Link to application on rakumo workflow (same format as email)",
}
```

* It is provided as a flat JSON format without a hierarchical structure.

● **The parameter specifications included in the HTTPS (SSL) POST request body are as follows.**

Parameter name	meaning	remarks
appUser	Applicant	Not stated in notification emails, etc.
appUserEmail	Applicant email address	Not listed in the notification email, etc. (included at the end of the URL)
title	Subject of application	
statusText	Status of application	
name	Application form name	
appNumber	Application number	
id	Application ID	
link	Link to application form on rakumo workflow	It is the same as the URL described in the notification email etc.

● **Details of Webhook request transmission processing**

➢ **Transmission mechanism**

   - -When the action is triggered, it will be sent sequentially by asynchronous processing.

     ・On the workflow, proceed to the next step without waiting for the webhook to be sent.

   - -Create a queue waiting to be sent, and send at a pace of "1 request / second" for rakumo as a whole.

   - -Retry if the other party does not respond or returns a response other than the HTTP 200 series.

➢ **Retry mechanism**

   - Attempts to send up to a total of 5 times, including the first one.

   - The waiting time from the first time to the second time is 1 minute, and after that, the waiting time is doubled each time.

   - If the 5th transmission fails, an error will occur and the error record will be displayed on the workflow screen.

   - There is no function to notify the occurrence of an error or to manually retry

● **Restrictions**

Webhook actions do not allow you to:

  ➢ Customize HTTP request headers

    ・Adding signatures and tokens, overwriting User-Agent, etc.

  ➢ Customize the JSON format

    ・Increase / decrease items, change item names, etc.

     = Cannot match the format requested by the receiver

  ➢ Use methods other than POST

  ➢ Recording the response to the webhook and performing some processing according to the response

  ➢ Sending a webhook to a BASIC-authenticated URL

  ➢ HTTPS communication using your own SSL certificate

- **Precautions for use**

➢ Please note that the function for authentication is not provided.

- You cannot include tokens, signatures, etc. in the HTTP request header.

- User-Agent strings cannot be changed.

- Basic authentication is not supported.

➢ We do not recommend using it for "problems if processing fails".

- It is not a function whose integrity is guaranteed.

- We cannot guarantee that the notification will be implemented because it is provided on a best effort basis.

➢ If the request fails, you cannot manually retry.

- If the request fails, it will automatically retry with a gradual increase in intervals, up to a maximum of 4 times.

- If the failure continues, the process ends. You cannot manually retry.

➢ Sending the webhook may be delayed slightly.

- Since it is a mechanism to send sequentially by asynchronous processing, the sending of the webhook may be delayed.

- It is possible that the next step may be reached before the webhook has been sent.

- If you have set the webhook action for multiple steps in the route, the order in which the webhooks are sent may not be the same as the step order. (For example, when the request continues to fail)

21.3. Set the webhook action

The setting flow when using the Webhook action is as follows.

- Setting flow when using Webhook action
    1. Pre-settings on the rakumo Admin Console
    2. Add a webhook action
    3. Actually apply and test the webhook action

21.3.1. Enable action features and edit domain allow list

Preconfigure with a Google Workspace privileged administrator or rakumo administrator account.

<Screen to operate>

rakumo Admin Console > Workflow Settings

https://a-rakumo.appspot.com/admin/settings/workflow

<Setting procedure>

1. Enable the webhook action.

Check "Enable" and "Webhook action" of the Post Step Actions Feature, Set "Save".
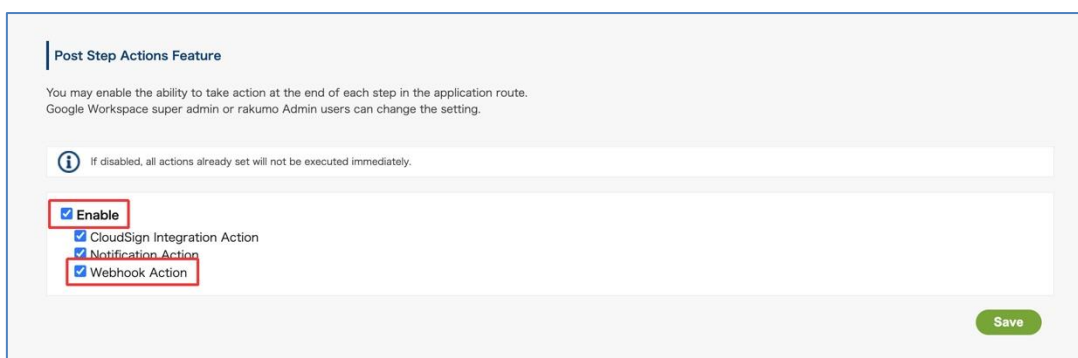
2. Next, edit the domain permission list in "Domains of external systems to which rakumo is allowed to communicate".

Add the domain of the destination URL for the webhook. Please register the domain with an exact match.

Domains of external systems to which rakumo is allowed to communicate

The following features allow communication only to the domains added here. (Exact Match)

- Post Step Actions Feature > Webhook Action

※ No domains allowed.

Add Other Domain: [Domain Name (Ex. example.com)]　[Add]

Wildcards with "*" (asterisk) cannot be specified.

This completes the preset settings.

Then set the action.

21.3.2. Add a webhook action

Let's set the webhook action on the detail screen of the application form.

<Preparation>

Complete the application form and application route settings.

<Screen to operate>

rakumo Workflow Admin Console > Manage Forms

https://a-rakumo.appspot.com/workflow/admin/appform/

<How to set the action>

1. Access rakumo Workflow Admin Console > Manage Forms and open the application form details screen
to which you want to add a webhook action.

2. Access rakumo Workflow Admin Console > Manage Forms and open the application form details screen
to which you want to add a webhook action.
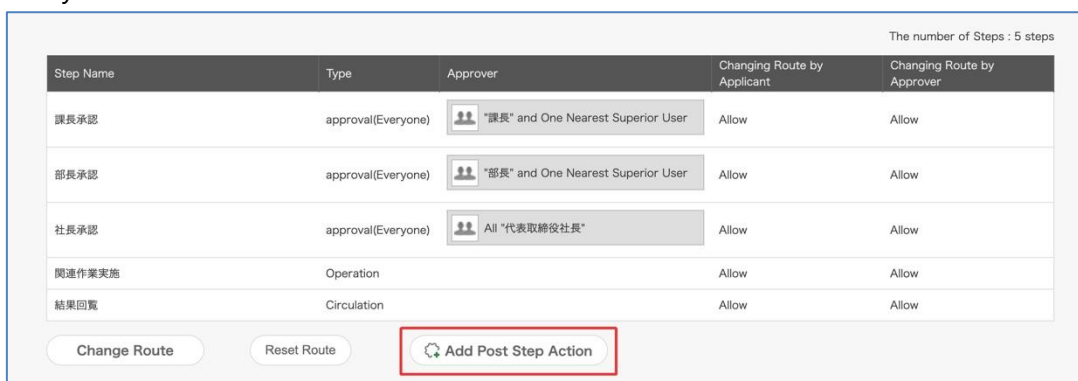
3. Access rakumo Workflow Admin Console > Manage Forms and open the application form details screen
to which you want to add a webhook action.
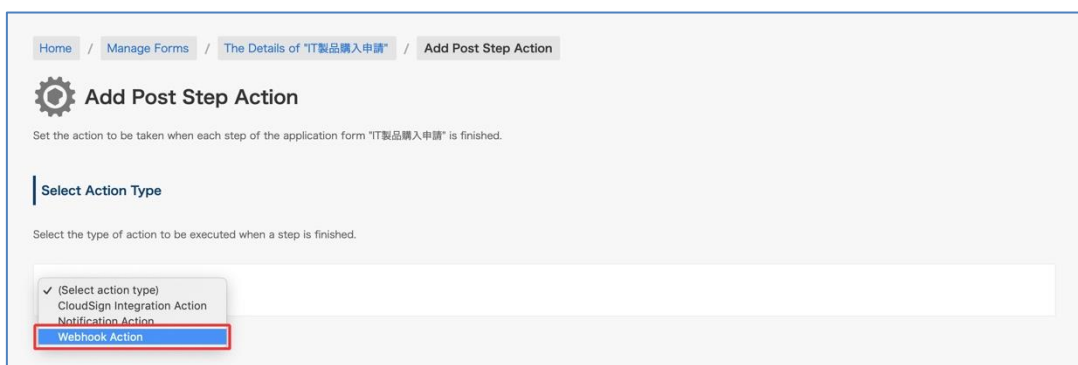
4. At the bottom of the page, you will see the Execution Settings section for Webhook Actions.

5. Enter an Action Name. (* 1)

Action Name (30 characters or less)

Webhook Action

6. In "When to Execute an Action", select which route step the action should be executed when the processing is completed. (* 2,3)

When to Execute an Action

Takes an action when the selected step finished.

Application Route Step   社長承認

7. In "URL to send the POST request", specify the Webhook destination URL. (*4)

URL to send the POST request :

- The URL must begin with https://.
- Communication to the domain must be allowed on rakumo Admin Console.

https://hooks.slack.com/workflows/

8. Finally, click Add Action.

This completes the action settings.

When the settings are complete, the set actions will be displayed in "Details of application route" on the details screen of the application template.

Step Name	Type	Approver	Changing Route by Applicant	Changing Route by Approver
課長承認	approval(Everyone)	"課長" and One Nearest Superior User	Allow	Allow
部長承認	approval(Everyone)	"部長" and One Nearest Superior User	Allow	Allow
社長承認	approval(Everyone)	All "代表取締役社長"	Allow	Allow
↳ Webhook Action (Webhook Action)				Delete
関連作業実施	Operation		Allow	Allow
結果回覧	Circulation		Allow	Allow

The number of Steps : 5 steps

Change Route   Reset Route   ↻ Add Post Step Action

* 1 "Action Name" is displayed at the action location on the route.

* 2 Candidates will see a list of steps in the application route associated with the application form. For details of each step, see "Steps of Appl. Route" at the bottom of the page.

*3 When the processing in the step selected in "When to Execute an Action" is completed, the action is automatically executed.

* 4 You cannot set URLs other than those registered in the domain that "Domains of external systems to which rakumo is allowed to communicate" in rakumo Admin Console > Workflow Settings.

This completes the settings in the rakumo workflow.

Please apply and test the webhook action to use it.

The Japanese version of "rakumo Workflow Administrator Manual" introduces the flow of setting the workflow builder of slack as an example of using the Webhook action.

We apologize for the inconvenience, but please refer to this as well.

22. Frequently asked questions

■ **When you log in to the Workflow Admin Console, it says, "Privilege Error: You have no privileges to view this page."Please tell us how to configure the settings to log in.**

There are 2 types of users that can log in to the rakumo Workflow Admin Console (https://a-rakumo.appspot.com/workflow/admin).

1. **Workflow Manager** that can set all the features on the Workflow Admin Console.
 For how to configure the settings, see "2.1. Registering users that can access the Workflow Admin Console (Workflow Manager)" in this manual.

2. **Operator**, who can set part of the features on the Workflow Admin Console (example use: Set to have the employees in the accounting department manage only application forms related to accounting)
 For how to set, see section "6.6 Setting Up the Operators for an Application Category" of this manual.

3. **rakumo Admin**, System admin. Users with this role can perform all operations in this console.(Some operations require Google Workspace Administorator privileges.) For how to set, see section "9. Granting administrative privileges to users and groups" of rakum General Settings Administorator's manual.

■ **Is it possible to delete an application form that a user has already submitted?**

Yes. You can delete application forms that users have already submitted. Users that can delete application forms are Workflow administrators and operators in the relevant application category. Note that regular users cannot delete applications.

For how to delete, see [8.2.2 Delete applications] of this manual.

■ **When I create a new application form, it says, "It is already registered."**

The code you registered for an application form that you created before may be registered for a new application form (includes forms that are already deleted).

Register newly created application forms with a new code.

■ **Does the order of the application route have to be from [Approval Step] to [Operation Step] to [Circular Step]? I would like to set it in the order from [Operation Step] to [Approval Step] or [Circular Step] to [Approval Step]**

The order of the steps in the application route is "Approval" → "Operation " → "Circulation", and the order cannot be changed. Thank you for your understanding.

■ **Are there settings to publish approved application forms to users that are not in the route?**

No. Only the users in the application route and administrators can check application forms that have been submitted. There are no public viewing settings. We apologize for the inconvenience. Thank you for your understanding.

■ **Is it possible to delete the title of an application form and change it to another name?**

At present, it is not possible to delete or change the [title] of application forms. Instead, you can configure the settings for input character restrictions, input requirement settings, and pre-entered values.

Appendix 1: Registering detailed user data

Register detailed information of the user to use in the rakumo workflow.

Registration of user's detailed information is performed using a CSV file.

<Preparation in advance>

Whether the user who wants to output to the CSV file satisfies the output conditions before performing

CSV file operations

Let's check it.

Only users who satisfy the following two points are output to the CSV file.

- ✓ The display status of the user is [Display]
- ✓ Belongs to a group, and the display status of that group is [Display]

Users whose display status is [Not display], users who do not belong to a group, or Users who belong to a group whose display status of group is [Not display] are not output to the CSV file.

→ You can check the group affiliation status of each user on the following screen.

rakumo Admin Console > Manage User > Display Settings > User Details

→ You can set the display status of the user on the following screen.

rakumo Admin Console > Manage User > Display Settings

For details on how to set, see the **Administrator's Manual [rakumo General]** 6. Configuring the Display/Not display settings for users.

→ You can configure the display settings of the group on the following screen.

rakumo Admin Console > Manage Group

For setting method, see the **Administrator's Manual [rakumo General]** 7. Setting Group to Display/Not display and Set the Priority of Group/User Display.

<Screen to operate>

rakumo Admin Console > Manage User > Detail Settings

https://a-rakumo.appspot.com/admin/users/-/profiles

<Operation method>

1. In advance, execute Google Synchronization on the rakumo Admin Console > Google Sync.

https://a-rakumo.appspot.com/admin/gapps_sync

※ Be sure to click ［Synchronize］ button by Google Workspace's special administrators of the Google Workspace primary domain.

2. After completing the Google Sync, access the Manage User > Detail Settings.

https://a-rakumo.appspot.com/admin/users/-/profiles

3. Click the [Create CSV] button at the bottom of the screen.

4. The message "**Started creating CSV. Please wait for a while until completion.**" Will be displayed.

- After waiting for a while, click → **Reload**.

-When the creation process is complete, "**Successfully created CSV file.**" is displayed.

5. Click **» Download the recent created CSV file** to download the CSV file.

6. Edit the content of the downloaded CSV file and save it.

※ If you use a CSV file to set the job title, manually add the Job Title Code column. (First time only)

※ The latest setting status is output by downloading the CSV file after performing the "Create CSV" operation.

In order to avoid unintended configuration changes, please be sure to download and edit the recent created CSV after performing "Create CSV".

※ For the content of CSV file and input value of each column, please refer to Appendix 3: Setting of user

information in rakumo, CSV file format.

7. Click [Choose file] under "Set User Detail Information" and select 6 CSV files.

8. Click the [Update] button.

※ If you click the "Update" button, the current registration will be overwritten.

9. The message "**Saved user detail information temporarily. Please wait for a while until update completion.**" is displayed.

Please wait a while and then click → **Reload**.

If the update is complete, "**Completed importing CSV data.**" is displayed.

This completes registration of user's detailed information using a CSV file.

Appendix 2: Editing registered detailed user data

We will show you how to edit the detailed information of the user used in the rakumo workflow.
The flow of operation is the same as the registration procedure.

<Screen to operate>
rakumo Admin Console > Manage User > Detail Settings
https://a-rakumo.appspot.com/admin/users/-/profiles

<Operation method>
1. In advance, execute Google Synchronization on the rakumo Admin Console > Google Sync.
https://a-rakumo.appspot.com/admin/gapps_sync

※ Be sure to click ［Synchronize］ button by Google Workspace's special administrators of the Google Workspace primary domain.

2. After completing the Google Sync, access the Manage User > Detail Settings.
https://a-rakumo.appspot.com/admin/users/-/profiles

3. Click the [Create CSV] button at the bottom of the screen.

4. The message "**Started creating CSV. Please wait for a while until completion.**" Will be displayed.

- After waiting for a while, click **→ Reload**.

-When the creation process is complete, "**Successfully created CSV file.**" is displayed.

5. Click **» Download the recent created CSV file** to download the CSV file.

6. Edit the content of the downloaded CSV file and save it.

About Users Output to CSV File at Update

If you have uploaded a CSV file to rakumo even once, the newly created and downloaded CSV file from the "Create CSV" button contains the following data:

(1) A user whose detailed information is registered in a CSV file (The same as the data contents that can be downloaded from "» Download user detail information")

(2) Users newly imported into rakumo and users newly added to the group

(1) For users whose detailed information has already been registered in a CSV file, the A column "Update" in the CSV file is blank.

Even for the user corresponding to (1), "D" is output to the A column "Update" in the CSV file for the following users.

Users deleted from affiliation group, Users who were already in a deleted group, Users who have already been deleted, Users who are not originally in rakumo

(2) "A" is output in the "Update" column in the CSV file for users newly imported into rakumo or newly added to a group by Google Sync.

Please update and edit this user's information on the CSV file. As "A" is a mark to the last, delete it and "Update"

The column should be blank.

[About the handling of the user line described as "D" in the "Update" column in the CSV file]

The data described as "D" in the "Update" column when uploading a CSV file is not imported into rakumo. If you do not need user data in the "D" line, leave the user data in the "D" line on the CSV as it is, or delete the user data in the "D" line and upload.

If you want to keep the user data of "Update" column "D" on CSV, leave "Update" column blank, add "Protected" column newly in CSV, enter "1" and upload please. The next time you create a CSV, the "Update" column will output blanks, not "D".

* The latest user display / non-display, priority organization, and license allocation status are output only to the CSV file downloaded by performing the "Create CSV" operation. To avoid unintentional setting changes, be sure to download the last CSV created after executing "Create CSV" and edit it.
* However, for the "Job Title Code" column, "Contents uploaded last time in CSV" is always output. The latest job title setting information cannot be output to the "Job Title Code" column.

※ The latest setting status is output by downloading the CSV file after performing the "Create CSV" operation.

In order to avoid unintended configuration changes, please be sure to download and edit the recent created CSV after performing "Create CSV".

※ For the content of CSV file and input value of each column, please refer to Appendix 3: Setting of user

information in rakumo, CSV file format.

7. Click [Choose file] under "Set User Detail Information" and select 6 CSV files.

8. Click the [Update] button.

※ If you click the "Update" button, the current registration will be overwritten.

9. The message " **Saved user detail information temporarily. Please wait for a while until update completion.**" is displayed.

Please wait a while and then click → **Reload**.

If the update is complete, "**Completed importing CSV data.**" is displayed.

This completes updating user details using a CSV file.

Appendix 3 The format of the CSV file to set up user data in rakumo

Use a CSV file for the data to import detailed user data settings into the rakumo Workflow. To edit files, use Microsoft Office Excel and other spreadsheet software. The items required for the CSV file are as follows:

○ is used in the Workflow.

Item name (Maximum number of characters that can be entered: 256)	Description	Workflow
Update	Status updated by the synchronization of Google Workspace ***1**	
User ID	**[Required]** The email addresses of the users registered with Google Workspace ***2**	○
Family Name	Last name	○
Given Name	First name	○
Family Name Yomi	Pronunciation of last name (Hiragana, Katakana) ***3**	○
Given Name Yomi	Pronunciation of first name (Hiragana, Katakana) ***3**	○
Company	Company Name ***4**	
Company Yomi	Pronunciation of name of company (Hiragana, Katakana)	
Department Email	**[Required]** Department Email ***2**	○
Department	Department	○
Job Title	Job Title ***3**	○
Birthday	Date of birth displayed in Contact	
Business Address	Company address displayed in Contact	
Business Phone	Company Phone Number displayed in Contact	
Business Phone Extension	Business Phone: Extension Number displayed in Contact	
Business Fax	Business Fax Number displayed in Contact	
Mobile Phone	Mobile Phone Number displayed in Contact	
E-mail Address	Email address displayed in Contact	
E-mail 2 Address	Email address displayed in Contact	
E-mail 3 Address	Email address displayed in Contact	
Employee Number	Employee Number ***3**	○

Primary	Settings for priority organization **4**	○

Display	Configuring the display/not display settings for users	○
Calendar Enabled	Calendar license assignment **4**	
Contacts Enabled	Contact license assignment **4**	
Workflow Enabled	Workflow license assignment **4**	○
TimeRecorder Enabled	Time Recorder license assignment **4**	
Board Enabled	Board license assignment **4**	
Expense Enabled	Expense license assignment **4**	
Attendance Enabled	Attendance license assignment	
Protected	Set whether to keep user data of the row of "D" in "Update" column in CSV. **4**	
Job Title Code	Post code of [Post, Position Settings] **6**	

*1 A (Added): Users that are newly imported into rakumo and users that are newly added to groups

D (Deleted): Users deleted from their groups, users who were members of already deleted groups, already deleted users, and users who have never existed in rakumo.

Blank: Users whose detailed data are already registered in the CSV file other than blank, A, and D

You can also upload files by deleting Column Update.

*2 Make sure to register the "User ID" column and the "Department Email" column in lower case letters.

*3 You can display this user data when setting the [Text Input] in the application form.

*4 For the settings, see the **Administrator's Manual [rakumo General].**

*5 To leave the user data in Row D, Column Update in the CSV file, enter "1."

You can also upload files by deleting Column Protected.

*6 See 7.7.3 Assigning a User to a Job Title. Please check the following notes when performing job title operations using the "Job Title Code" column.

■ About the output of the "Job Title Code" column

-The "Job Title Code" column does not exist in the CSV file in the initial state. This column is used by manually adding when editing CSV when batch assignment of job titles is performed in a CSV file. (The position of the column at the time of addition does not matter. For the sake of clarity, we recommend that

you add it to the end of the existing column.)

-If you add the "Job Title Code" column, the "Job Title Code" column will be output when you create a CSV file. However, if the "Job Title Code" column is deleted and uploaded, the "Job Title Code" column will not be output when creating a CSV file.

-The value output in the "Job Title Code" column is always the "Job title code specified in the previously uploaded CSV file".

■ What you can do in the "Job Title Code" column

In the "Job Title Code" column, you can perform two types of operations using the job title code.

A. Creating and assigning new job titles:

By entering a job title code that is not registered in "Manage Job Titles", you can "Create a new job title + Assign a new job title to the user who entered the job title code".

For newly created positions in the "Job Title Code" column, "Job title" and "Job title" are not set.

After uploading the CSV file, open the (untitled) job title edit screen from the "Job title and job title settings" screen, and change the name and specify the job title.

B. Bulk assignment of existing job titles:

By entering the registered job title code in "Manage Job Titles", you can "Replace the existing job title assignment status with the registered contents of the CSV file".

If you specify a registered job title code, all user assignments for that job title will be replaced by the definitions in the CSV.

(Example: If you upload a CSV file that specifies Mr. D and Mr. E as the "manager" when the assignment status of the existing position "manager" is Mr. A, Mr. B, and Mr. C, the "manager" is Mr. D. Only Mr. E.)

If you upload a CSV that does not have the "Job Title Code" column, or if you upload a CSV that has all the values in the "Job Title Code" column blank, the user assignment of the job title will not change.

■ What you can't do in the "Job Title Code" column

The following operations cannot be performed in the "Job Title Code" column. Please note.

❌ Output the job title setting status at the time of CSV file creation in the "Job Title Code" column.

When creating a CSV file, the "Job Title Code" column contains the "Job title code specified in the previous CSV file".

It is output as a value. The latest setting status cannot be output.

To prevent unintentional setting changes, please consider performing one of the following operations.

a) Job titles should be assigned using CSV files, and manual assignment should not be performed.

b) Please use it after confirming that the job title assignment status on the CSV file matches the current job title setting status.

❌ Leave all "Job Title Code" columns blank to reset the job title assignment status.

For positions where the position code does not appear in the CSV file, the position assignment status will not be changed.

If you want to reset the assignment status of all job titles, please cancel the assignment manually from the management screen.

Also, if there is a job title that is no longer needed, delete it from the management screen or cancel the user assignment.

Create columns for all the items when creating a CSV file. Leave blank the fields for items that are not required in the Workflow.

To assign a user to a post, add the "Job Title Code" column. See "7.7.3 Assigning a User to a Job Title " for more details.

Appendix 4: Request Regarding Automated Notification Emails from Workflow

The sender email address of automated notification emails from rakumo Workflow (notifications@rakumo.com) may change in the future. We request that you configure your email sorting settings based not on the email address but on subject.

## Appendix 5 A quick reference to what a user with administrative privileges can do

Introducing the operations that can be performed when any authority is assigned in Google Workspace or rakumo.

● Whether you can perform the operations required to use rakumo with the Google Admin Console.
You need a Google Workspace Super Admin role (or a role that can perform each operation).
You cannot use or operate various setting menus on the Google Admin Console in each role set in "Administrator Settings" of rakumo.

○：Possible,　×：Impossible

	Super Admin	Groups Admin	User Management Admin	Services Admin	rakumo Admin
Access the Google Admin Console	○	○	○	○	×
Create / update / delete users	○	×	○	×	×
Create / update / delete groups	○	○	×	×	×
API control	○	×	×	×	×
Creating building resources	○	×	×	○	×

● The role of Google Workspace administrator who can set rakumo on the rakumo management screen
Only "Super Admin" can set rakumo on the rakumo management screen * 1,2
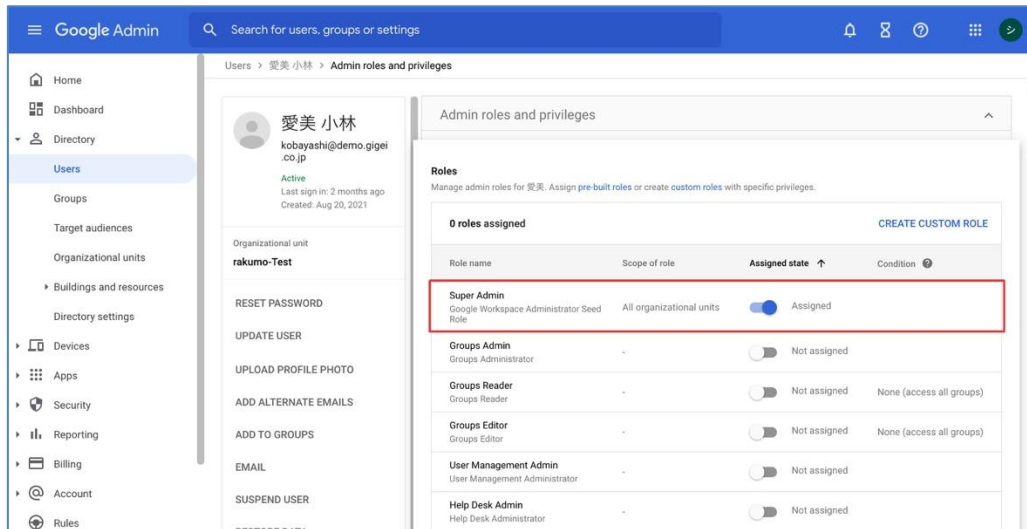
The "Super Admin" can perform both the setting operations on the Google Admin Admin and the operations on the rakumo administration screen, which are necessary to use rakumo.
We recommend that you assign the "Super Admin" role to the person in charge of managing rakumo.

* 1 Users who do not have the administrator role of "Super Admin" can also set rakumo except for some operations by separately setting the role on rakumo in "Manage Roles" on the rakumo management screen.
* 2 Even if you set the role on rakumo in "Manage Roles" on the rakumo management screen, there are some settings that require Super Admin privileges for operation.

● Operations that can be performed for each role of the administrator on rakumo

The various setting menus of rakumo that can be used by Super Admin of Google Workspace and users with each role set in "Manage Roles" of rakumo are as follows.

○ : Possible, △ : Can be operated conditionally, × : Impossible

	Google Workspace Super Admin	rakumo Admin	Workflow Admin	Operator of application category	Board Admin	Expense Admin	Attendance Admin
Access the rakumo Admin Console	○	○	○	×	○	○	○
Google Sync	○	×	×	×	×	×	×
Organization Name	○	○	×	×	×	×	×
Manage Licenses	○	○	×	×	×	×	×
Manage Users	○	○	×	×	×	×	×
Manage Groups	○	○	×	×	×	×	×
Manage Job Titles	○	○	×	×	×	×	×
Manage Roles	○	○	×	×	×	×	×
Display Settings	○	○	×	×	×	×	×
{Product name} settings * 1	○	○	○	×	○	○	○
Change calendar sharing settings	○	×	×	×	×	×	×
Access the Workflow Admin Console	×	○	○	△*3	×	×	△ *4
Access the Expense Admin Page	○	○	×	×	×	○	×
Displaying the Attendance management menu	△*5	△*5	×	×	×	×	○
Gadgets	○	○	×	×	×	×	×

* 1 Google Workspace Super Admin / rakumo admin can set all products under contract, and {product name} administrator can set only matching products. (Example: If you are a workflow administrator, you can only set the workflow)

* 2 To use the Workflow Admin Console, Google Privileged Administrator users must assign {product name} administrator privileges and a license for the target product. If you want to use the expense charge screen or the Kintai management menu, you need to assign a license for the target product.

* 3 "Operator of application category" has management authority for the application category set as the person in charge of operation.

On the Workflow Admin Console, you can operate only for the target application category.

* 4 The "Attendance Admin" has the authority of the person in charge of operations for the application category "rakumo Attendance application".

On the Workflow Admin Console, you can only operate the application category "rakumo Attendance Application".

* 5 Only when one or more "Attendance Admin" is set, the Google Workspace Super Admin and rakumo administrator can display the Attendance management menu.

* 6 This table summarizes whether or not the operation can be performed as of January 2022. Due to specification changes, there is a possibility that the operations that can be performed by each administrator will increase. Please note.