

JOBCAN Workflow

# Startup Guide

- Screen Description P.1
- Overall flow P.4
- Items to be set prior to operation P.7
- Useful settings P.12

**Technical support** (10:00~17:00 - excluding weekends and holidays)

Phone No.: 050-3160-0303

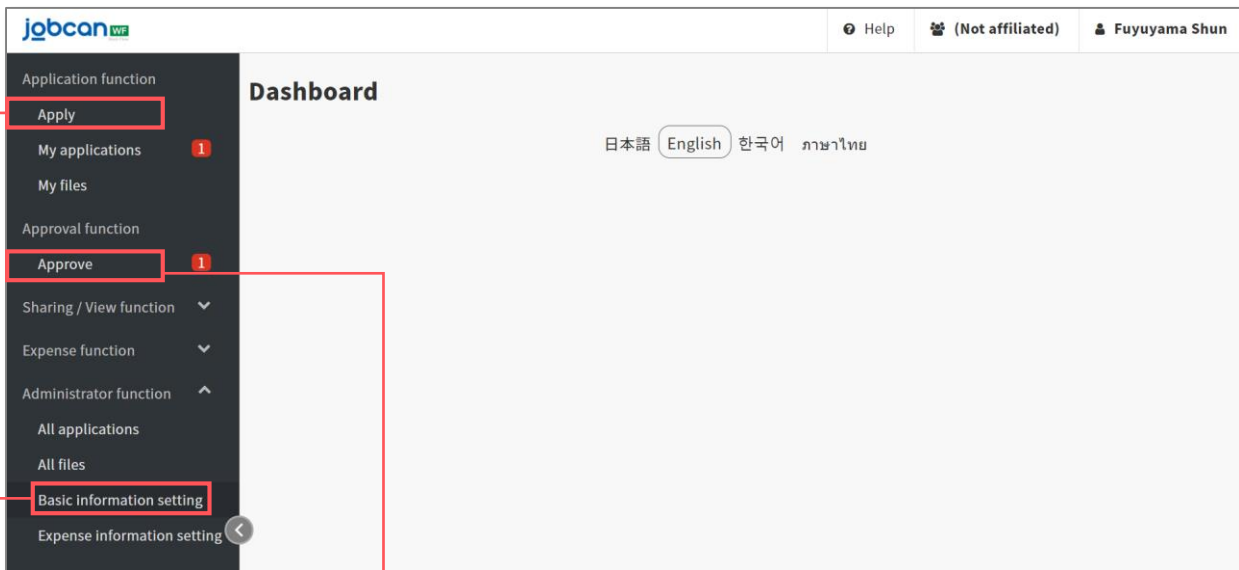
E-mail: [support@wf.jobcan.jp](mailto:support@wf.jobcan.jp)

Chat: Available from the bottom right

Help page: Available from the top right

# Screen Description

## TOP



### Application screen

Enter the contents and apply.

### Approval screen

Confirm the application and approve.

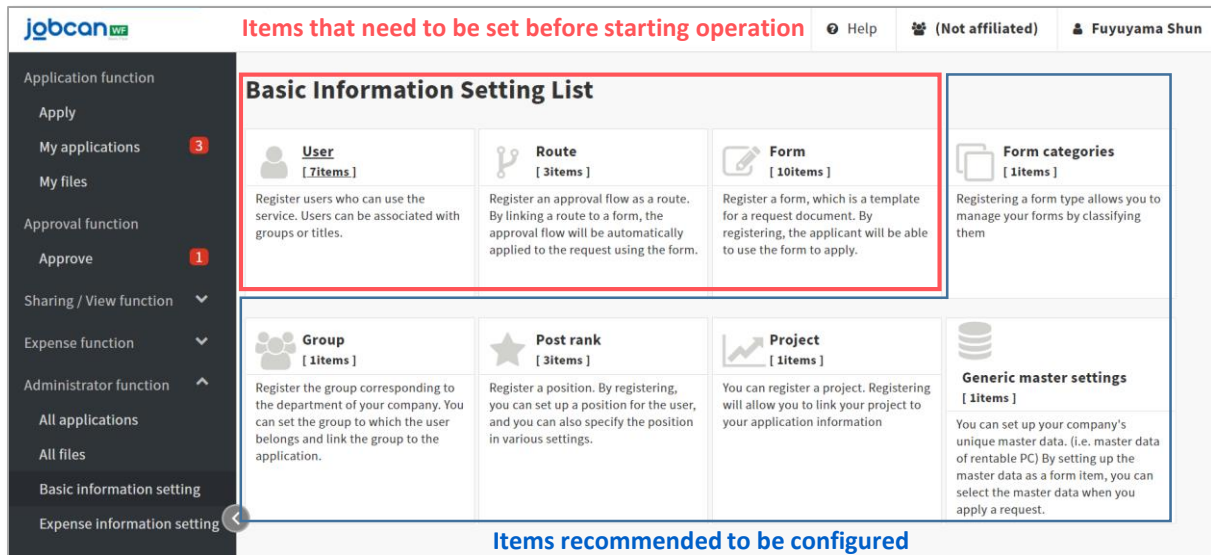
### Settings screen

Configure to suit your company.

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

## Settings screen

Prior utilization, certain configurations must be set. Others are optional.



## Functions on each screen

### User

Register the users who will use JOBCAN Workflow.

### Route

Register the approval route to be implemented for each application form.

### Form

Configure the items of the application forms to be submitted by users.

### Form categories

Offers the possibility to categorize and manage forms.

### Group

Offers the possibility to set the groups to which users belong and link groups to application information.

### Project

Link projects to application information.

### Post rank

Register positions. By doing this, it will be possible to specify approvers by using their position when configuring routes.

### Transfer source

If a transfer source is selected as a form item, you can select a registered business partner for the application.

### Generic master settings

Offers the possibility to register master information when making an application.

# Overall flow

## (Application and approval procedures)

## ? About applications

Applications submitted via JOBCAN Workflow are called "applications". When entering the information and submitting the application, the next approver is automatically requested to approve the application.

1 Click "Apply" on the left side menu

2 Select an application form

Click on the row of the application form matching your desired content.

Authorization for item purchase (10万以上の場合の経路)	Public	Fill this form in order to request permission for the purchase of articles.
Business trip application form (出張申請)	Public	
Transportation cost form (10万以上の場合の経路)	Public	

3 Enter the content

Insert the content of the application form. The items of the form can be customized by the administrator.

### Business trip application form

**Application title** (required)

**Approval deadline**  Set  Not set  
Please set if there is need for an approval deadline on this application. Any date after today can be specified as the approval deadline.

**Related group**  ✕

**Related project**  ✕

4 Apply

Verify the application details. If correct, click "Apply".

## ? About approval

Approving an application is referred to as "approval". Unlike paper applications, there is no need to put a seal on the form or pass it to the next approver. Simply press the approval button and it will be implemented automatically.

1 Click "Approve" on the left side menu

2 Confirm the application

From the "Approve" screen, click on the application to approve.

3 Review the application, and approve or return it

\*If "return" is selected, you can return the application to the applicant or to the previous step. You can also reject it.

# Items to be set prior to operation

- **User registration**  
Register users of JOBCAN Workflow.
- **Route registration**  
Register approval routes to be applied to application forms.
- **Form registration**  
Set application form items to be submitted by users.



## ? About users

JOBCAN Workflow users. It is possible to set permissions (normal user, administrator, etc.) and link to groups and positions.

- 1 On the left menu, click "Administrator function" → "Basic information setting" → "User"
- 2 Register users through the desired method.

**User list**

Registered user list. You can register new user from the button below.

To integrate user information from Google Workspace (former G Suite), click [here](#).

Buttons: Register new user, Invite new user, Show stopped user, User import, Download CSV

Staff code	Name	Email address	Post rank	Authority	Group	Q
All	All	All	All	All authority	All	x

### User invitation

Send invitation mail to users who wish to register. Users who have received an invitation mail will register their name and password.

### User registration

Individually register user information.

### Batch registration

Register groups of users in CSV files.

\*It is also possible to link user information via G Suite (formerly Google Apps).

## ? About routes

Approval routes that can be utilized for each application form. The number of approval steps can be increased freely, and approvers of steps can be flexibly configured.

1 On the left menu, click "Administrator function" → "Basic information setting" → "Route"

2 Register routes to be used for application forms

Step setting

Add step to approval step using the '+' button

1  
Step name (required) step1

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

Requester

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

All required approvals  
 Excluding the applicant themselves

+ -

The number of steps can be increased/decreased with + - .  
Approvers can be specified through one of these 4 methods.

### (1) Specify user

Utilize this option when the approver is a specific user.  
(Multiple approvers can be set).

### (2) Specify group/position

Use this option when the approver differs depending on the applicant's department, or to designate approvers by position, etc.

### (3) Specify a higher level group/position

In case of groups having different levels, this option allows to specify approvers of groups belonging to higher levels.

### (4) Specify when applying

Use this option when the approver is not strictly specified and you want the applicant to specify it at the time of application.

### (5) Applicants themselves

Use this option when you want the applicant to be the approver.

## ? About forms

Configure application forms for users to submit. The items on the forms can be freely customized. It is also possible to configure settings like route branching and numbering method.

1 Click "Administrator function" → "Basic information setting" → "Form"

2 Enter the form name and select the route to assign to the application form

\*It is possible to easily register forms by clicking "Register form from template" at the top of the screen.

3 Set items for the application form

4 Configure the detailed settings if necessary

With the advanced configuration, it is possible to configure useful settings for JOBCAN Workflow, such as form classification, route branching, and numbering method.

Item	Description	Usage	Display image
Single-line text	A text box that does not allow line breaks	Entering the name of the item to purchase without line breaks	<input type="text" value="Please enter"/>
Multiple-line text	A text box that allows line breaks	Having the application details filled in	<input type="text" value="Please enter"/>
Number input	An input field where only numbers can be entered	Having only numbers entered, such as value or amount	<input type="text" value="Enter the number"/>
Date selection	A field to enter dates	Having specific dates displayed, like purchase date or business trip date	<input type="text" value="yyyy/mm/dd"/>
Select month	Field to enter the month	Display months specified, such as month of contract or month of allocation	<input type="text" value="Select year"/> <input type="text" value="Select month"/>
Radio button	Make staff choose only one of the options	Making users select only one option from a small number of choices	<input checked="" type="radio"/> A <input type="radio"/> B
Pulldown menu	Make users select only one option in a drop-down list	Making users select only one option out of many	<input type="text" value="Select"/>
Checkbox	Offers multiple choices for the options	Having users select more than one option	<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
Request selection	Item that allows to select previously submitted applications	Making users select related applications	<input type="text" value="Search applications"/> <input type="button" value="x"/>
User selection	Item that allows to select registered users	Permitting the selection of the user related to the application	<input type="text" value="Search user"/> <input type="button" value="x"/>
Select a group	Item that enables selection of registered groups	Letting users select groups related to the application	<input type="text" value="Search groups"/> <input type="button" value="x"/>
Select a project	This item allows selection of registered projects	Letting users select projects related to the application	<input type="text" value="Search projects"/> <input type="button" value="x"/>
Generic master data selection	Allows selection from generic master information	Enabling selection from the company's own master data, such as the list of leased PCs	<input type="text" value="Search master data"/> <input type="button" value="Search"/> <input type="button" value="Clear"/>
Attachment selection	Files can be attached	Enabling attachment of several file types and setting of random item names	<input type="button" value="Select file"/>
Headline	Option to set headings	Permitting the addition of a headline to the title	You can specify a headline. <input type="text"/>
Explanation	Configure descriptions	Cases when an application information is to be shared with the applicant	There is the possibility to include an explanation.  <small>*This field that can not be entered by the user at the time of application.</small>
Calculation	Set up a detailed table with 1 to 10 columns	In cases of abundant data to be entered when applying, such as lists of purchased goods	Calculation <input type="text" value="10"/> <input type="text" value="x"/> <input type="text" value="20"/>  <small>*This field that can not be entered by the user at the time of application.</small>

## Useful settings

- **Form category registration**  
Categorize and manage forms.
- **Group registration**  
Register groups (departments) users belong to.
- **Project registration**  
Link projects to application information.
- **Position registration**  
Specify approvers for route setting according to their job position.
- **Transfer source registration**  
Select registered business partners at the time of application.
- **Generic master settings**  
Select registered master information at the time of application.

## ? About form categories

Allows to categorize and manage forms. In case numerous forms are registered, managing them according to their category will make it easier for applicants to find their applications.

1 On the left side menu, click "Administrator function" → "Basic information setting" → "Form categories"

2 Enter and save form category information

Form type name (required) Conference minutes

Form type code 2419

Parent form type Select form type x

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

Save

\*CSV batch registration is another possibility

3 Link registered form categories to forms

Allows linking to form categories through the detailed settings in "Basic information setting" → "Form"

Detail setting

You can set more form details

Form categories Select form type (Optional) Search Clear

\*Multiple form categories can be linked

4 Enable search by form category on the application form selection screen

## ? About groups

By registering groups (departments), it is possible to set the group to which users belong, and link it to application information.

1 On the left side menu, click "Administrator function" → "Basic information setting" → "Group"

2 Enter group information and save

General Information

**Group name**  
(Required)

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

**Accounting group code**  
  
Please enter a code to identify the group for accounting purposes. You can set the same code for multiple groups.

**Explanation**

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

\*CSV batch registration is possible as well

3 Link registered groups to users

User information is updatable in "Basic information setting" → "User".

Group

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

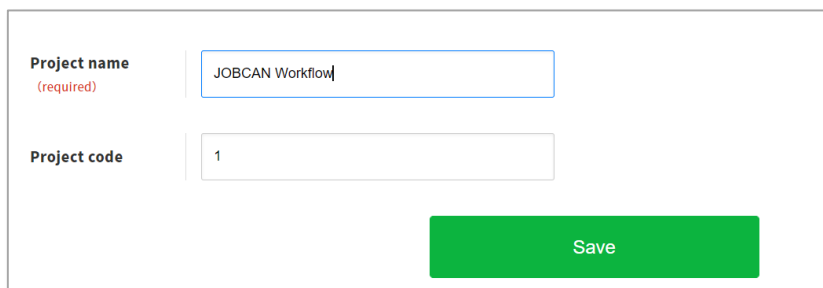
\*Multiple groups can be linked

## ? About projects

By registering a project, it can be linked to application data. If there is no need to manage projects, registration becomes unnecessary.

1 On the left side menu, click "Administrator function" → "Basic information setting" → "Project"

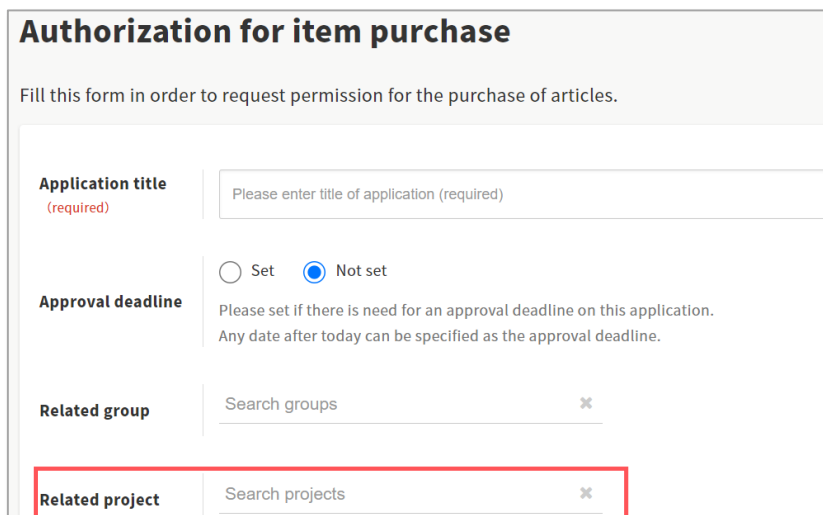
2 Enter project information and save



The screenshot shows a form with two input fields and a save button. The first field is labeled "Project name (required)" and contains the text "JOBKAN Workflow". The second field is labeled "Project code" and contains the number "1". A green "Save" button is located at the bottom right of the form.

\*CSV batch registration is possible as well

3 Registered projects can be linked to applications



The screenshot shows a form titled "Authorization for item purchase" with the instruction "Fill this form in order to request permission for the purchase of articles." The form contains several fields: "Application title (required)" with a placeholder "Please enter title of application (required)"; "Approval deadline" with radio buttons for "Set" and "Not set" (selected), and a note "Please set if there is need for an approval deadline on this application. Any date after today can be specified as the approval deadline."; "Related group" with a search input field "Search groups" and a clear button "x"; and "Related project" with a search input field "Search projects" and a clear button "x". The "Related project" field is highlighted with a red border.

\*Related groups and projects can be hidden or require input through the detail settings: "Basic information settings" → "Form"



## ? About positions

By registering a position, the said position is assigned to the user. When configuring routes, there will be the option to specify approvers by their position.

1 On the left side menu, click "Administrator function" → "Basic information setting" → "Post rank"

2 Enter position information and save

3 Link registered positions to users

Register and modify user data in "Basic information setting" → "User".

4 Specify approvers by position at route configuration

Register and update route data in "Basic information setting" → "Route".

## ? About transfer sources

Select a registered business partner from "Transfer source" when applying. If no partner is specified as an item, registration becomes unnecessary.

1 On the left side menu, click "Administrator function" → "Basic information setting" → "Transfer source"

2 Enter transfer source and save  
\*CSV batch registration is possible as well

3 Add "Transfer source" as a form item  
Register and update form data in "Basic information setting" → "Form".

Item setting

Transfer source

4 Select registered transfer sources when applying

Application title (required)

Approval deadline  Set  Not set  
Please set if there is need for an approval deadline on this application. Any date after today can be specified as the approval deadline.

Related group  ✕

Related project  ✕

Transfer source

## ? About generic master information

Configure the company's master data. When configuring "Generic master settings" as a form item, it is possible to select the registered master information when applying.

1 On the left side menu, click "Administrator function" → "Basic information setting" → "Generic master settings"

2 Enter generic master information and save

The screenshot shows a form titled "Add generic master data" with the following fields:

- Generic master data code (required)**: Input code (required). Input generic master data code to differentiate generic master data.
- Generic master data name (required)**: Input generic master data name. Input generic master data name.
- Explanation**: Input explanation. Add generic master data explanation.

3 Click on "Register new record", enter a master record, and save

The screenshot shows a form titled "Add record" with the following fields:

- Code (required)**: Input code (required). Input code for differentiating record.
- record name (required)**: Input record name (required). Input record name.

4 Add "Generic master data selection" to form items  
Register and update form data in "Basic information setting" → "Form".

The screenshot shows a form titled "Item setting" with a search bar and two buttons:

Leased PCs | Search master data | Search | Clear

5 Enable the selection of registered generic master records when applying

**Should you have any inquiry regarding settings or operation, do not hesitate to contact us.**

**Technical support** (10:00~17:00 - excluding weekends and holidays)

Phone No.: 050-3160-0303

E-mail: [support@wf.jobcan.jp](mailto:support@wf.jobcan.jp)

Chat: Available from the bottom right

Help page: Available from the top right