Garoon On-Premise Administrator Help

Third Edition

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1 chapter Basic System

This section describes the settings to be performed in "Basic system administration" on Garoon.

References

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- Organization Settings(55Page)
- User settings(68Page)
- Flow of Application Users Settings(211Page)
- Licenses(545Page)
- JavaScript and CSS Customization(579Page)

1.1. Accessing to Administration Settings and Administration Screens

This section describes how to access the Garoon administrator settings and the System administration screen.

References

- Access to the Administration screen(19Page)
- Login
- Administrator Settings(27Page)

1.1.1. Accessing to Administration Screens

To log in to the System Administration screen for the first time, configure the Web browser before you log in.
For details, see Setting Up Your Web Browsers.

Accessing the Garoon Administration Screen

You access the Garoon System Administration screen to configure the functions of Garoon.
The following functions are available for system administration.

- Basic system administration:
  Manages the basic system of Garoon, such as screens and administrative privileges.
- Managing applications:
  Manages applications used by users, such as scheduler and bulletin board.

Caution

- Single Sign-on and LDAP authentication cannot be used for access to the system administration screen.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

Note

- To access the System administration screen after the trial period, you need to enter the URL directly.
  An example of access URL of the System administration screen:
  - On Windows:
    http://(IP address or host name of the server)/scripts/cbgrn/grn.exe/system/index
  - On Linux:
    http://(IP address or host name of the server)/cgi-bin/cbgrn/grn.cgi/system/index

Contact Technical Support

You can contact Cybozu technical support for details about operational issues.

Caution

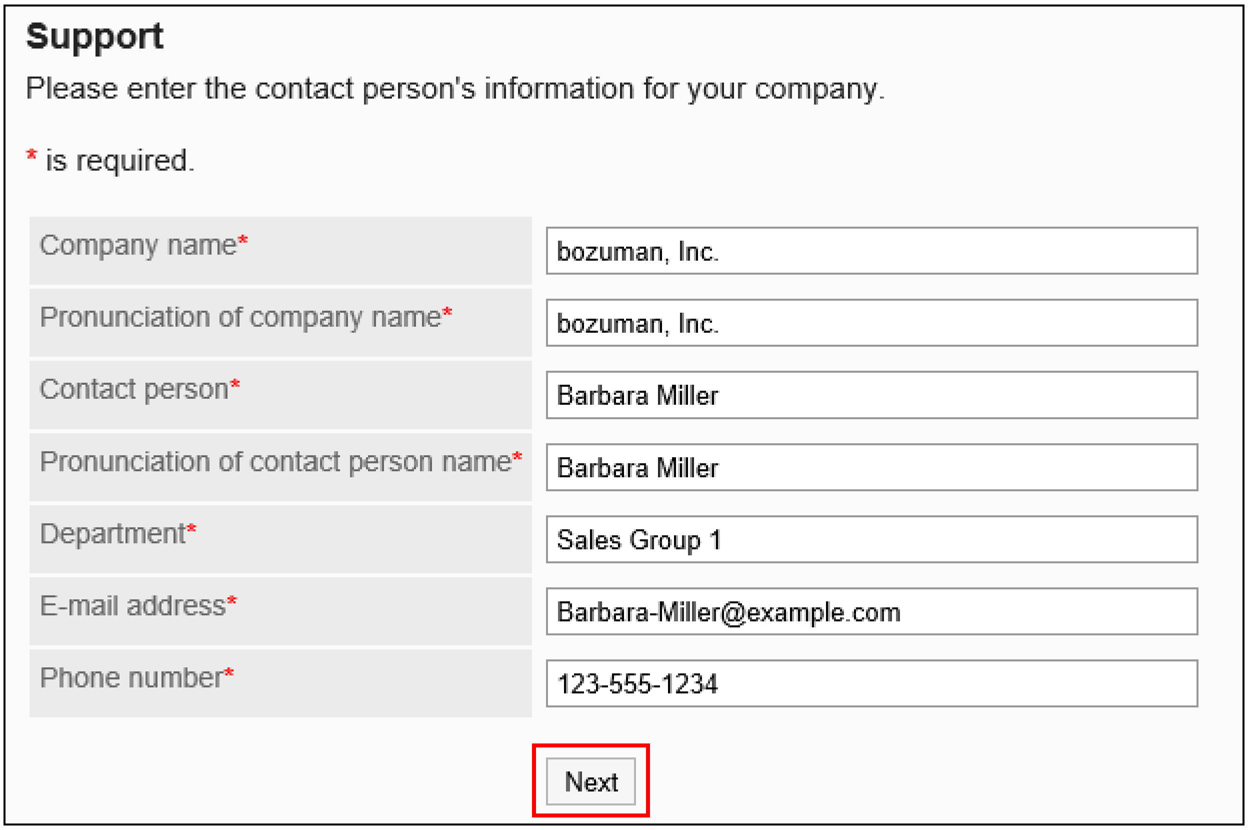
- A valid service license is required for getting help from the technical support. Only customers who are within trial period or with a valid service license can contact and get help from the technical support.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "Support".**

3. **On the "Support" screen, enter the required information, and click "Next".**



4. **On the "Send Information" screen, confirm the contents and click "Send".**

   To edit the entries, click "Previous" and start again from step 3.

Confirming Notifications

On the system administration screen, confirm the license information and the system information.

Steps:

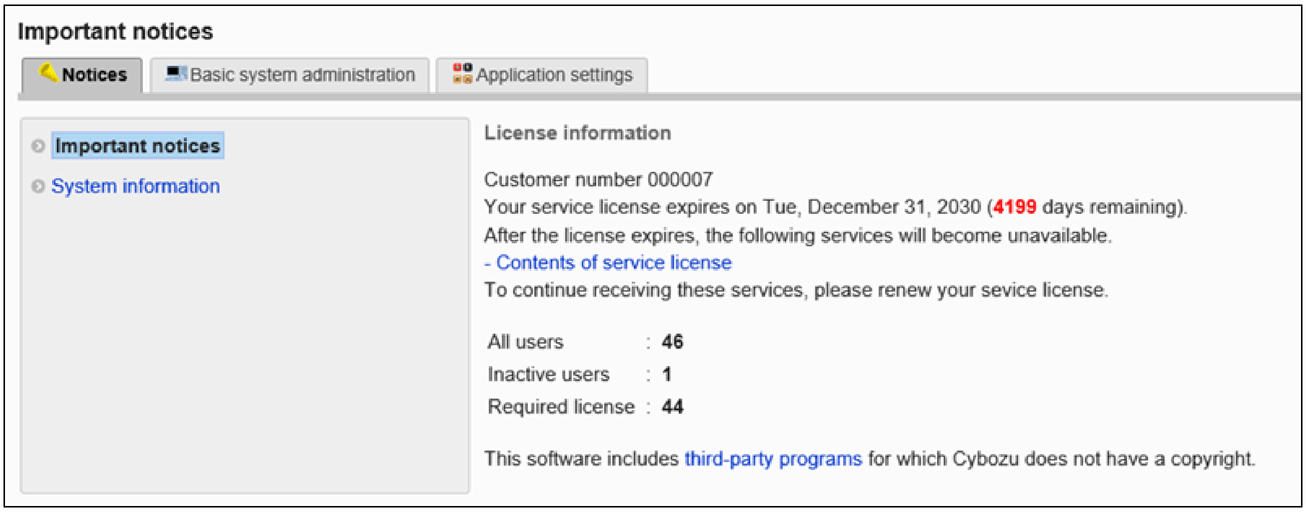
1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select the "Notifications" tab.

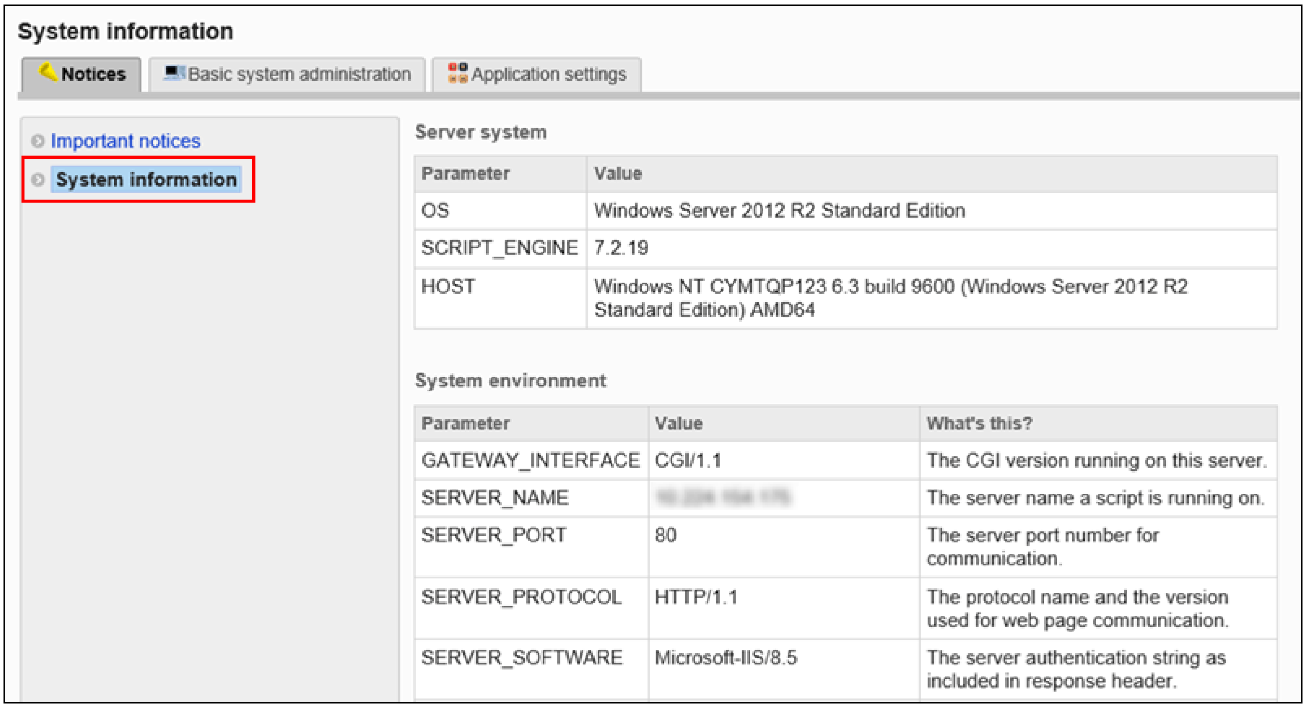
4. Click "Important Announcements".

The "Important Announcements" screen displays the expiration date of the license.



5. Click "System Information".

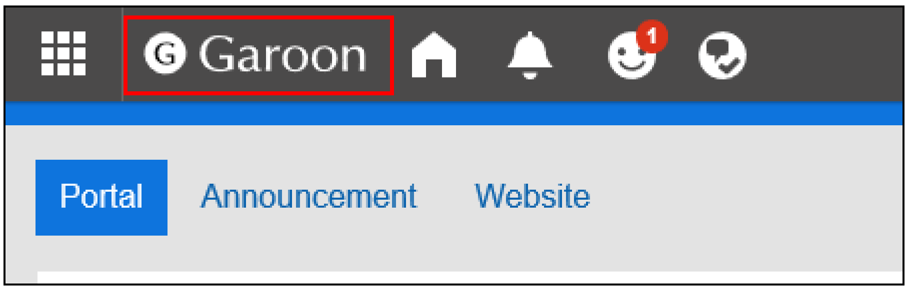
The system information screen displays the system information getting from the operating environment, such as the OS of the server running Garoon and the Web browser showing the system requirements.
Some information will be sent to Cybozu technical support when you request support.



1.1.2. Changing Customer Information and Logos

Customer information is required for trial, purchase, or inquiry of Garoon. On the screen to change customer details, set the required information.

You can also change the Garoon logo, which is set by default. The Garoon logo is part of the product name shown in the header.



Caution

- We recommend that you specify a logo image file using an URL. If you specify it using the file format, the data containing the image file is also accessed when the Garoon data is accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Steps:

1. Click the administration menu icon (gear icon) in the header.

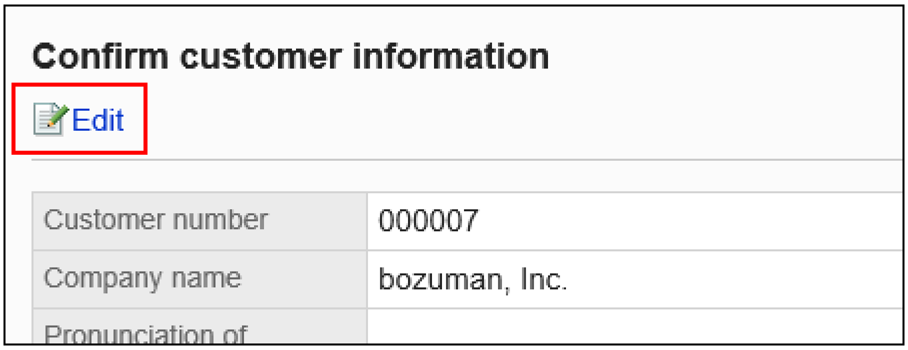
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Customer Information".

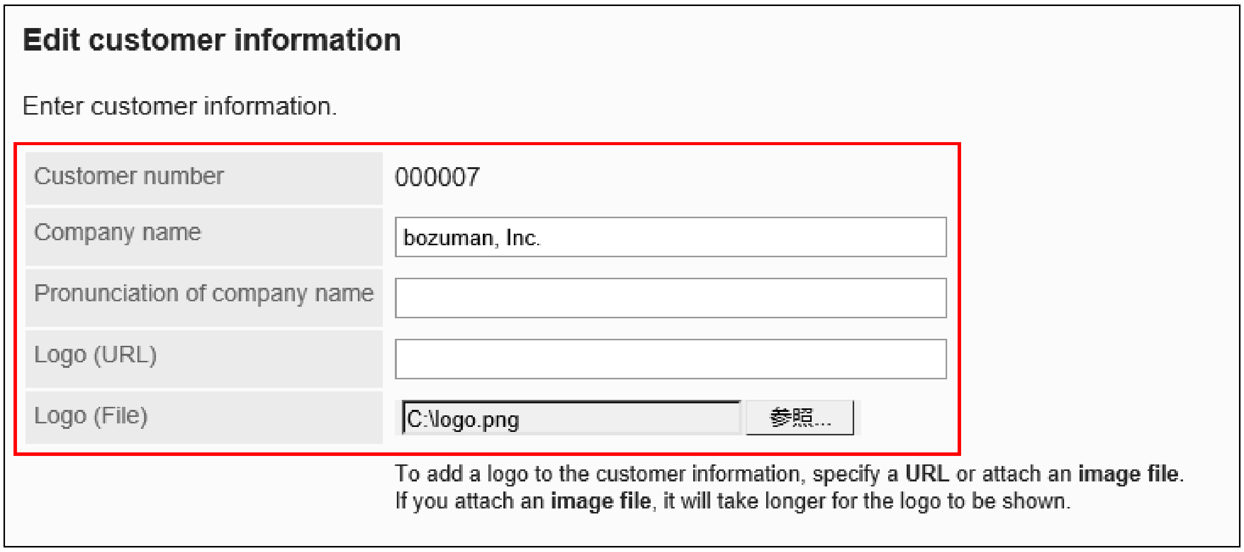
5. Click "Confirm Customer Information".

6. On the screen to confirm customer information, click "Edit".



7. On the screen to change customer details, set the required items.

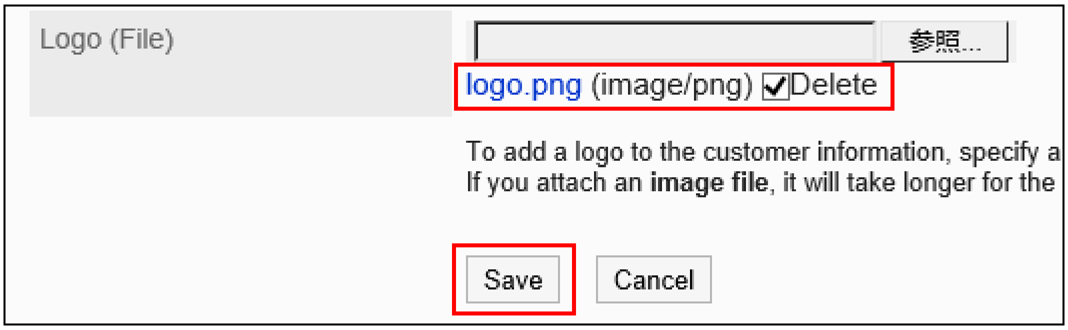
- Customer Number:
  Cannot be changed on this screen.
  On the screen to register license, add or change the number. For details, see the "License Management(547Page)" page.
- Company Name:
  Enter a name of a legal entity. The company name is displayed on the user's login screen.
- Company name (pronunciation):
  Enter the pronunciation of the company name.
- Logo (URL):
  Specify the URL of the image file. If both "Logo (URL)" and "Logo (file)" are set, the image specified in "Logo (URL)" will be used.
- Logo (file):
  Attach an image file.



8. Confirm your settings and click "Save".

Note

- If you want to revert to the default Garoon logo, delete the specified logo.
  On the screen to change customer information, select the "Delete" check box of the logo and click "Edit" to delete the logo.



1.1.3. How to Hide Help Links

Garoon provides online help.
If you are not connected to the Internet and you are using Garoon, you can prevent broken links by hiding the links to help.

Steps:

1. **Stop the Web server service on the server where Garoon is installed.**

2. **Open the common.ini file.**

   When Garoon is installed into the default installation directory, common.ini file is stored in the following directory.

   - On Windows: C:\Inetpub\scripts\cbgrn
   - For Linux: /var/www/cgi-bin\cbgrn

3. **Specify "0" for the "display_link" field in the "Help" section.**

   If "0" is specified for the "display_link", links to help are hidden.
   The default value of the "display_link" is "1". If "1" is specified for the "display_link", links to the help is displayed.

   ```
   [Help]
   display_link = "0"
   ```

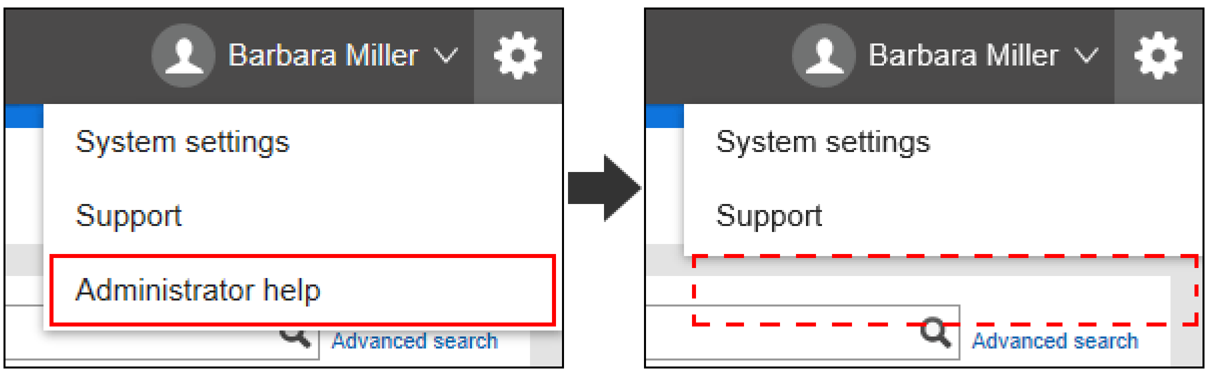
4. **Save the common.ini file.**

   If Garoon is in operation on multiple servers, repeat the steps 2 to 4 on all of the servers.

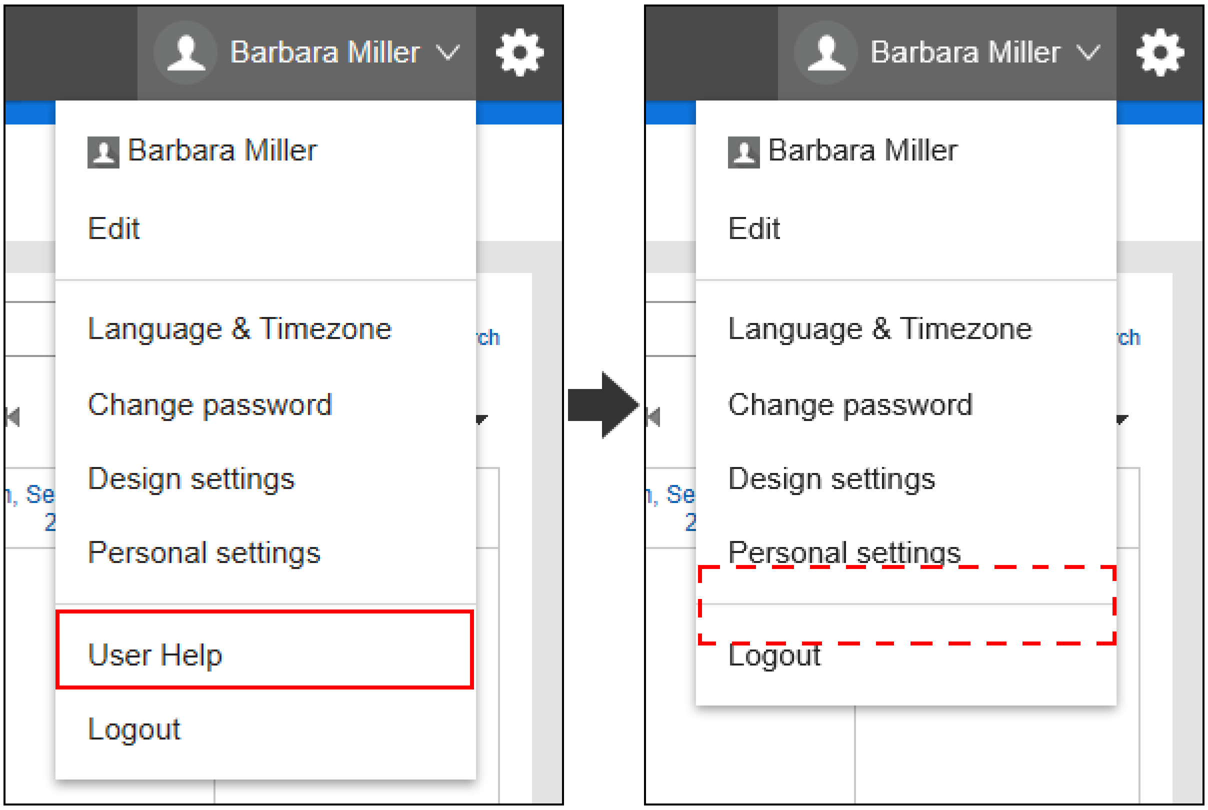
5. **Start the Web server service on the server where Garoon is installed.**

6. **Confirm that links to help are hidden.**

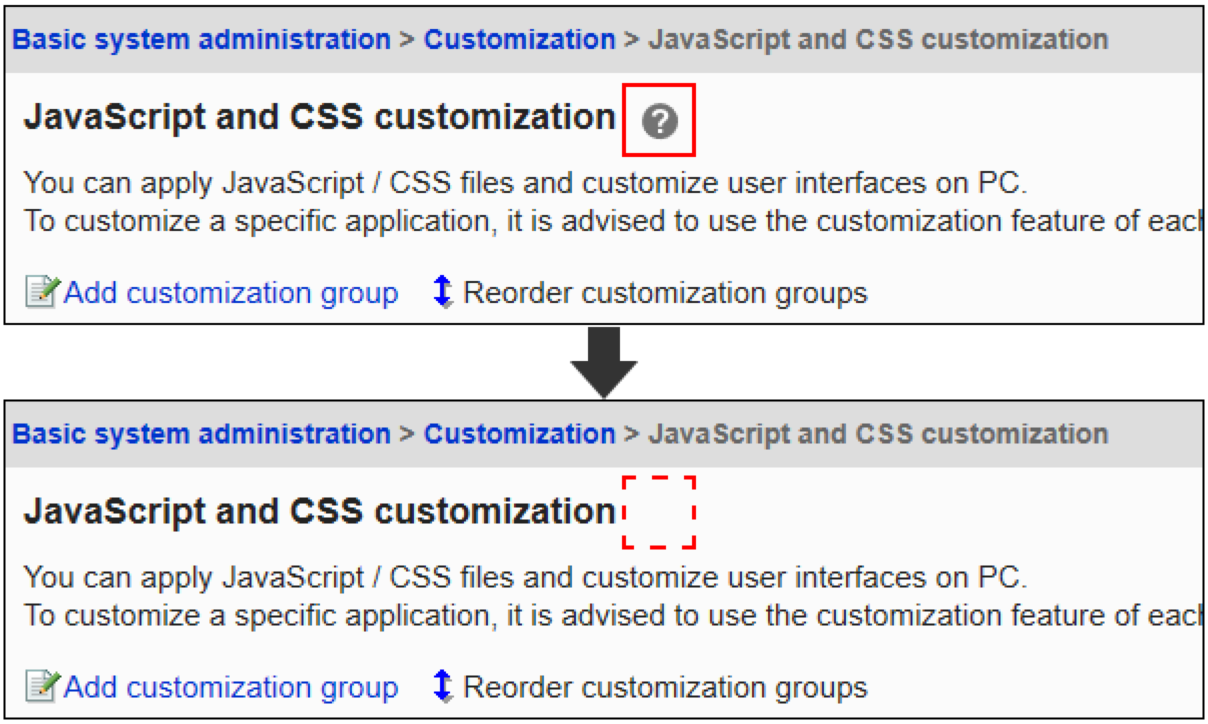
   - For Administrator Help in the header:



- For User Help in the header:



- For help on the "JavaScript and CSS Customization" screen in System Administration:



Note

- If you do not have access to the Internet, and you want to see help, you can download the PDF file and upload it to the file management page.

1.1.4. Administrator Settings

The following types of administrators are available in Garoon.

- **System administrators:**
  Administrators who manage the entire system of Garoon.
  By default, the following users are the system administrators for Garoon.
  - Administrator
  - Screens for users assigned to the Administrators role
- **Basic system administrators:**
  This administrator configures the availability and localization of applications.
  The system administrator appoints the basic system administrator.
- **Operational administrators for the organization:**
  Administrators who manage administrative tasks regarding organizations and users within the specified organization.
  The operational administrators of the organization will be appointed by the system administrator or by the basic system administrator.
- **Application administrators:**
  Administrators who have administrative privileges for individual applications.
  The system administrator appoints application administrators for each application.
- **Operational administrators for each application:**
  The operational administrators of each application are users who are assigned to operate the application by the system administrators or the application administrators.
  The methods for setting up operational administrators vary by application.

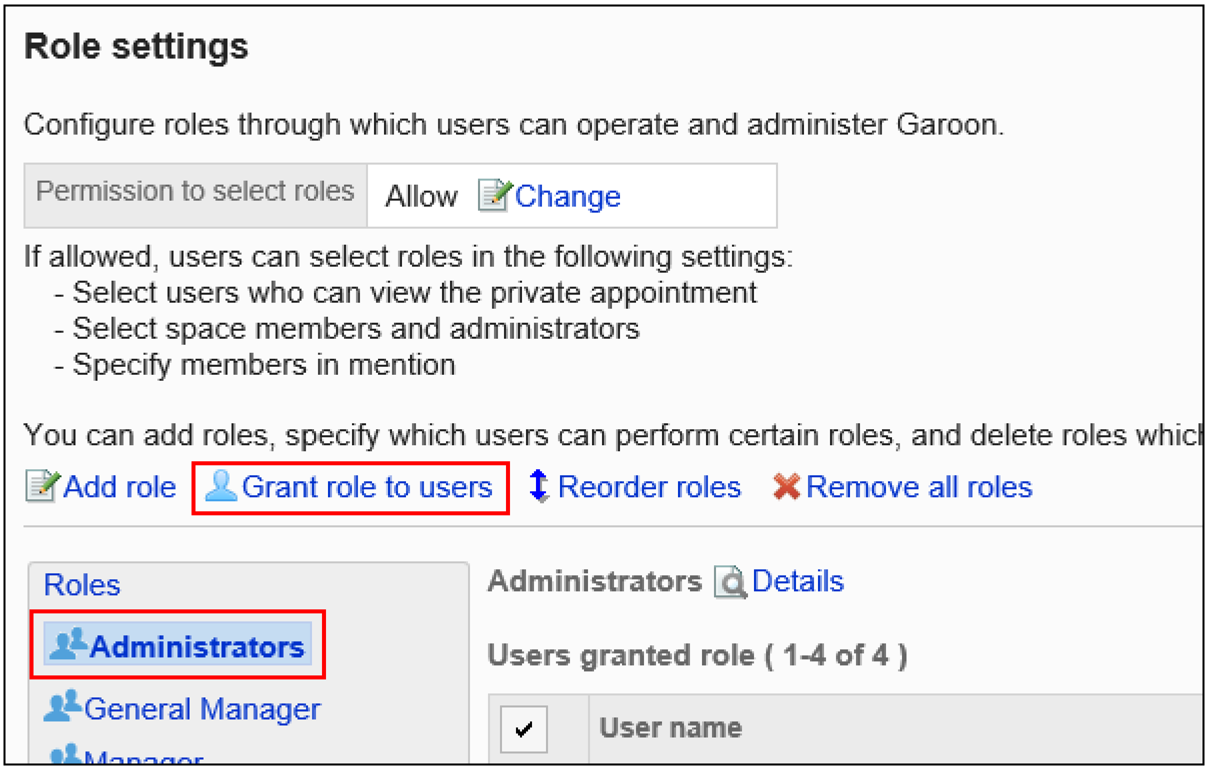
Setting System Administrators

Set the system administrator for Garoon.

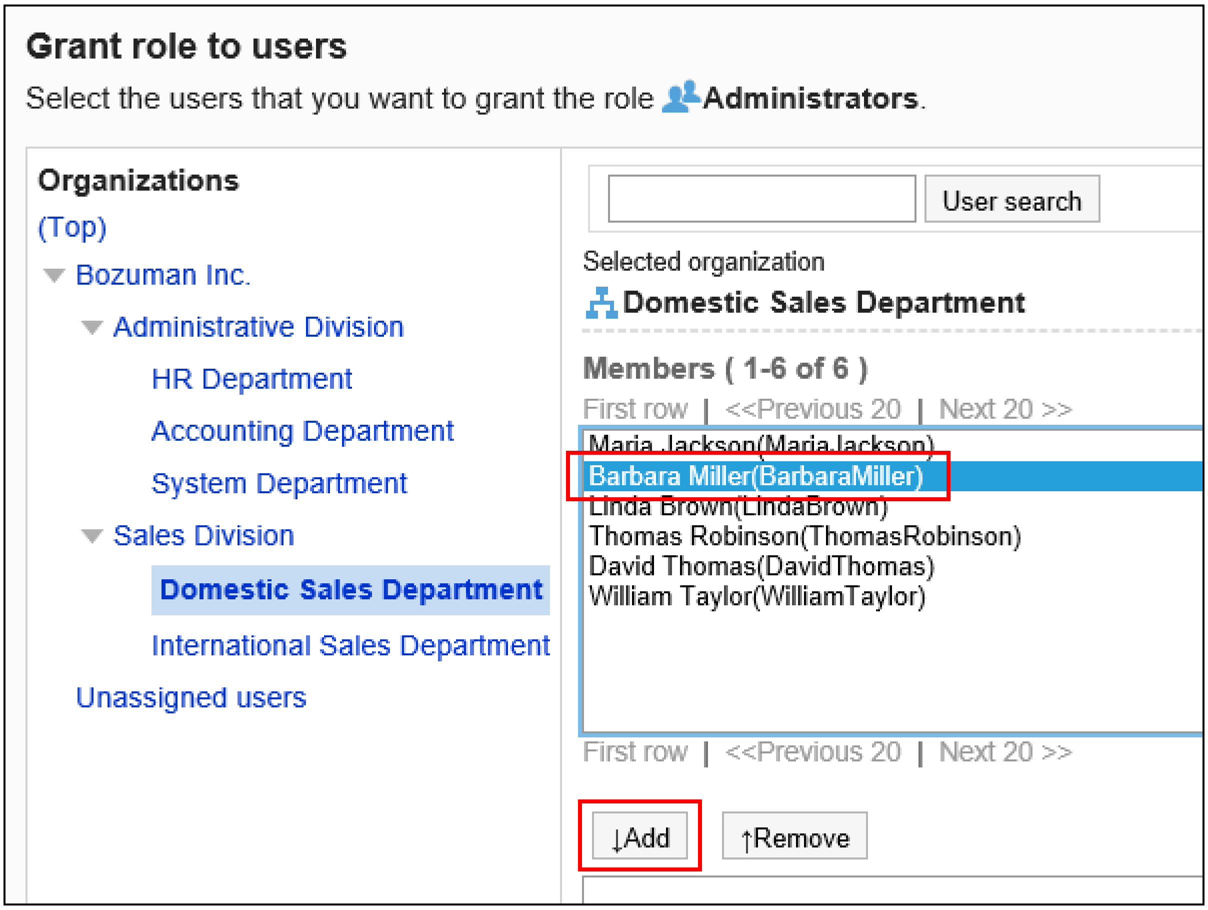
To set a user other than Administrator as a system administrator, grant the Administrators role to the target user.

Steps:

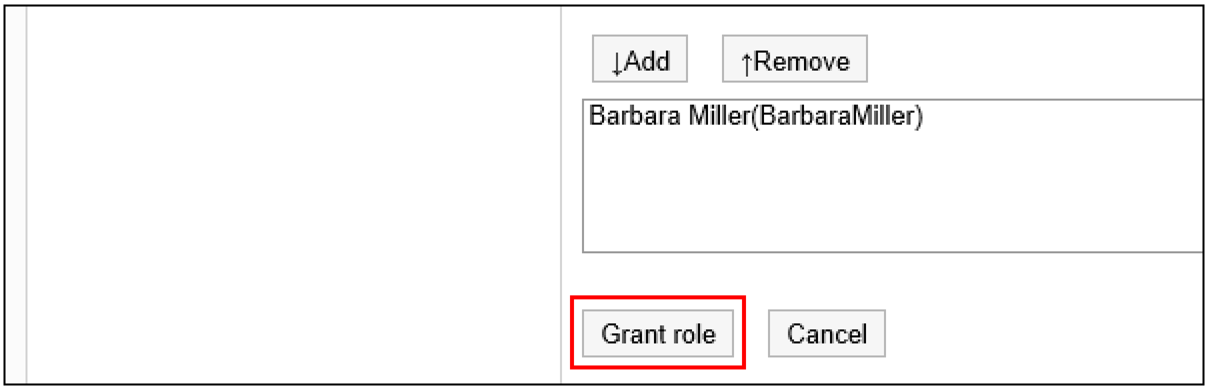
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "Role settings".**
6. **On the "Role Settings" screen, select "Administrators" in the role list, and then click "Force a role" .**



7. **On the "Role" screen, select the user who you want to grant the Administrators role to, and then click "Add".**

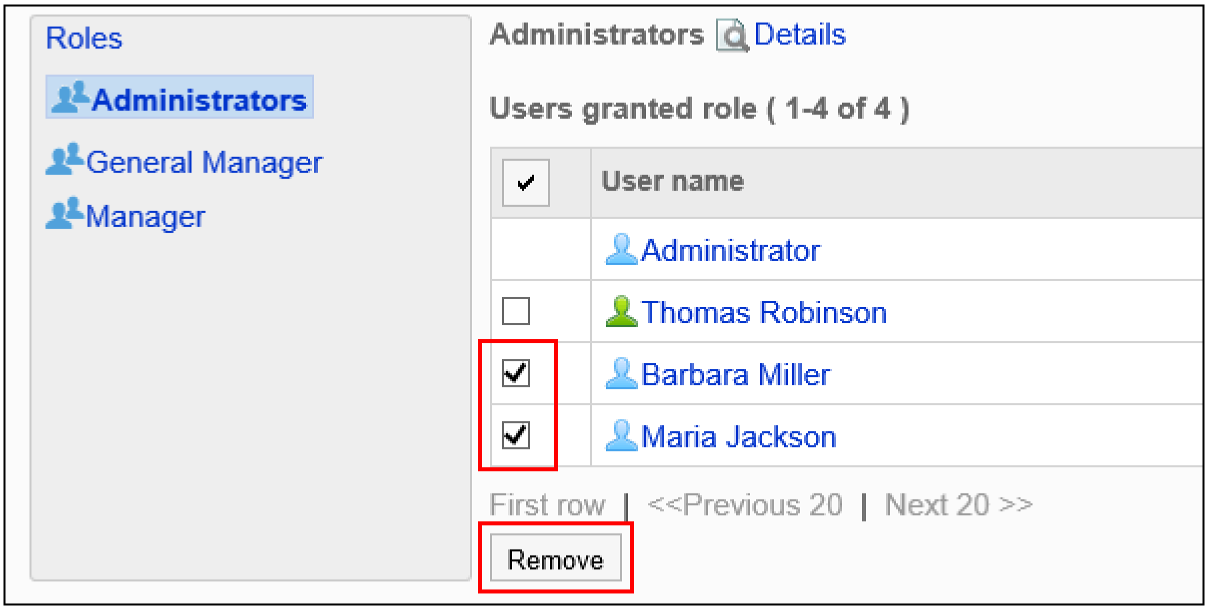


8. Click the button to assign.



9. If you want to delete a system administrator, you can delete the target user from the Administrators role on the "Role Settings" screen.

You cannot delete Administrator users who have been added to Garoon in the default settings.



Resetting Administrator Password

If you lost the password for the Garoon Administrator, use the command to reset the password.

For Windows

This section describes how to reset the Administrator password when you have installed Garoon in the following environment.

- Installation identifier: cbgrn
- CGI directory: C:\Inetpub\scripts

Steps:

1. Start Command Prompt and move to the following directory.

```
cd C:\Inetpub\scripts\cbgrn
```

2. Execute set_admin_password.csp.

```
.\grn.exe -C -q code\command\set_admin_password.csp
```

3. Type "yes" and press the Enter key.

4. Type a new password, and then press the Enter key.

5. Enter the password for confirmation, and then press the Enter key.

For Linux

This section describes how to reset the Administrator password when you have installed Garoon in the following environment.

- Installation identifier: cbgrn
- CGI Directory: /var/www/cgi-bin

Steps:

1. Start the console and move to the following directory:

```
cd /var/www/cgi-bin/cbgrn
```

2. Execute set_admin_password.csp.

```
./grn.cgi -C -q code/command/set_admin_password.csp
```

3. Type "yes" and press the Enter key.

4. Type a new password, and then press the Enter key.

5. Enter the password for confirmation, and then press the Enter key.

Setting Basic System Administrators

Set the administrator who has been granted the basic system administration privileges.
The basic system administrator can perform the same operations as the system administrator for the following items.

- Customer information
- Application
- Users
- Authentication
- Single Sign-On
- Files

- Screens
- Calendars
- Logging
- Licenses
- External Server
- Localization
- API

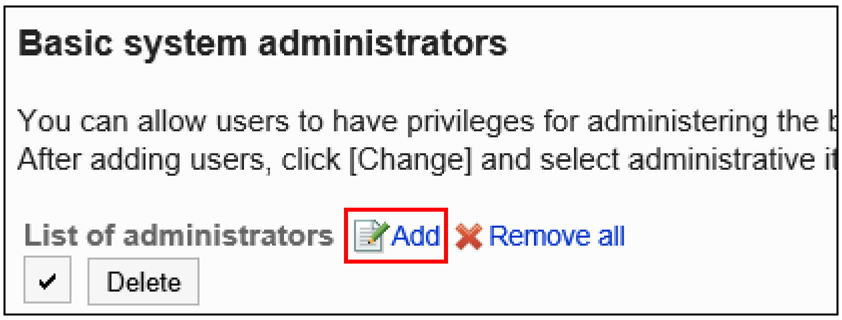
The system administrator appoints the basic system administrator.

Adding Administrative Privileges for Basic System

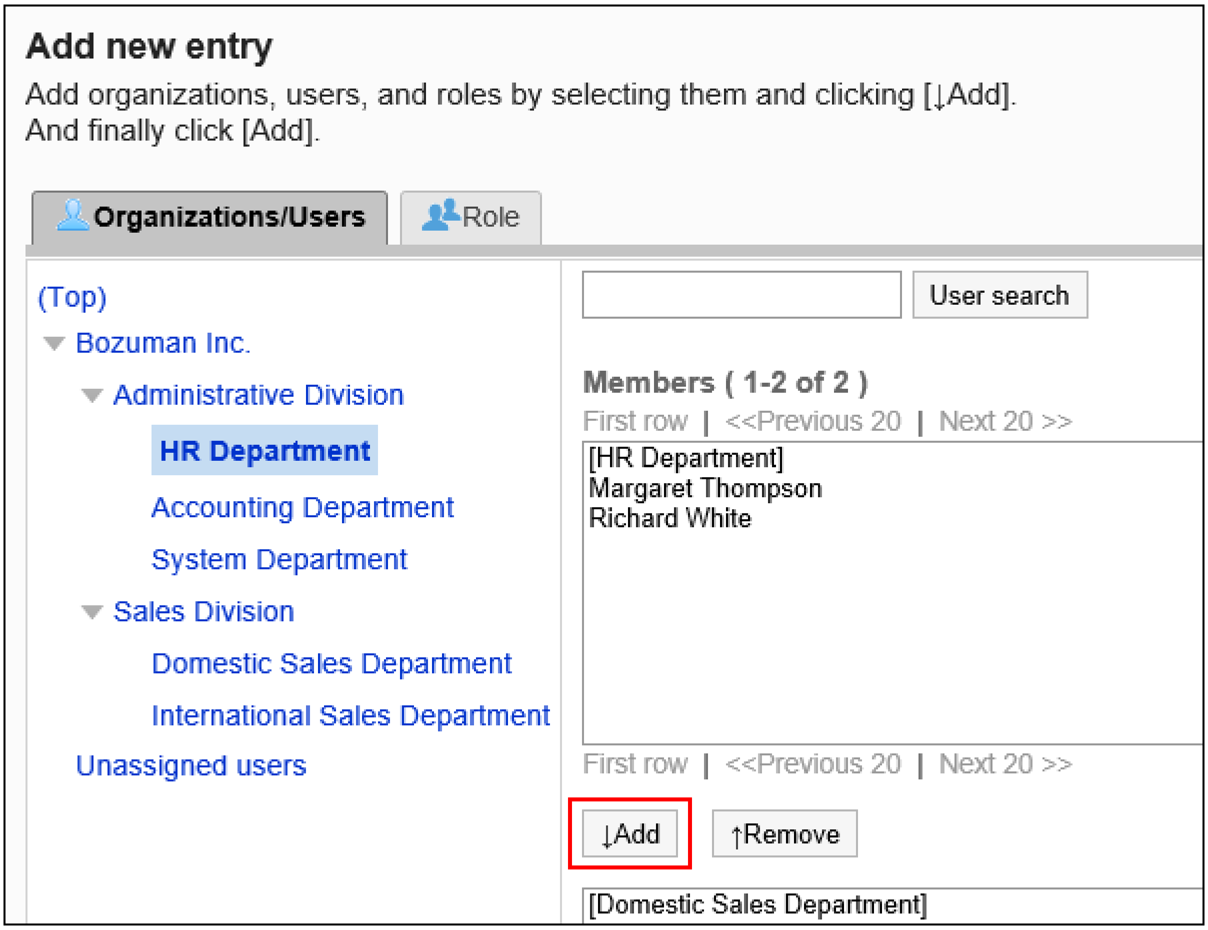
To add a basic system administrator, grant the basic system administration privileges to the organization, user, or role.

Steps:

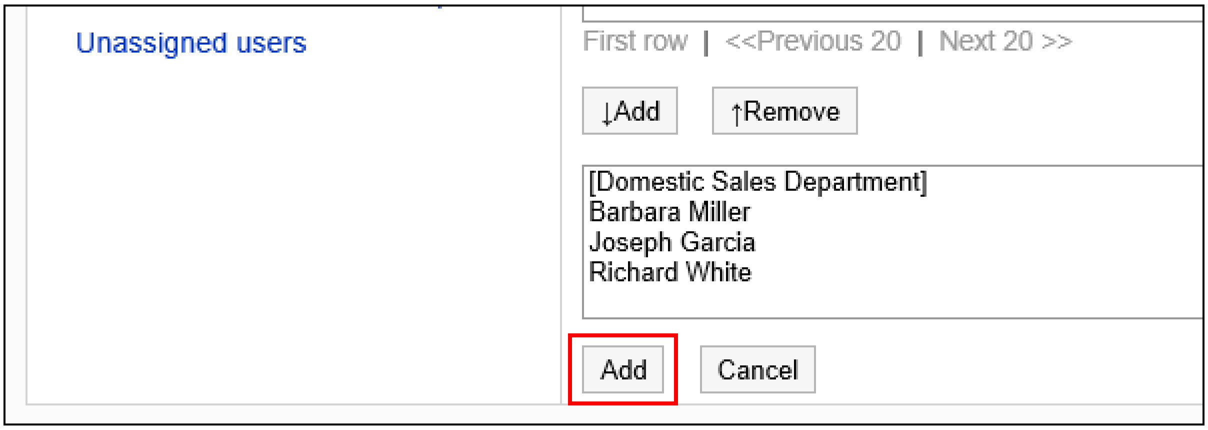
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click the item for administrative permissions.**
5. **Click basic system administration privileges.**
6. **On the screen for the basic system administration privileges, click "Add".**



7. **On the screen for adding administrative privileges for basic system, select the organization, user, or role you want to add administrative privileges to, and click "Add".**
   To select a role, switch the view to the Roles tab.
   When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



8. **Click "Add".**



The basic system administrator has no privileges with the default settings. You must change the administrative privileges for the basic system.

Changing Administrative Privileges for Basic System

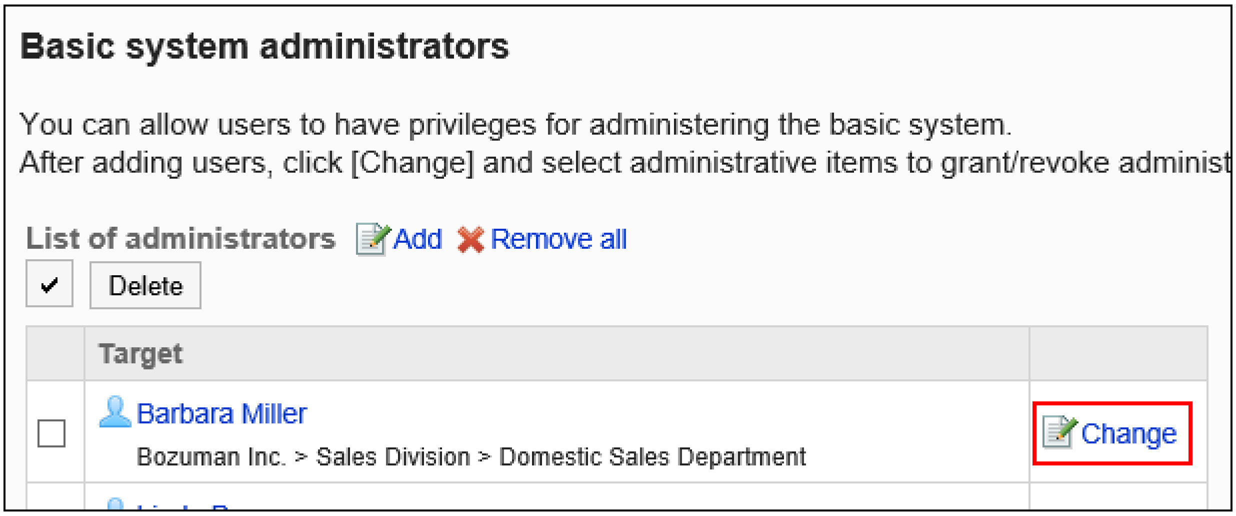
You configure functions that can be manipulated by the basic system administrator.

Note

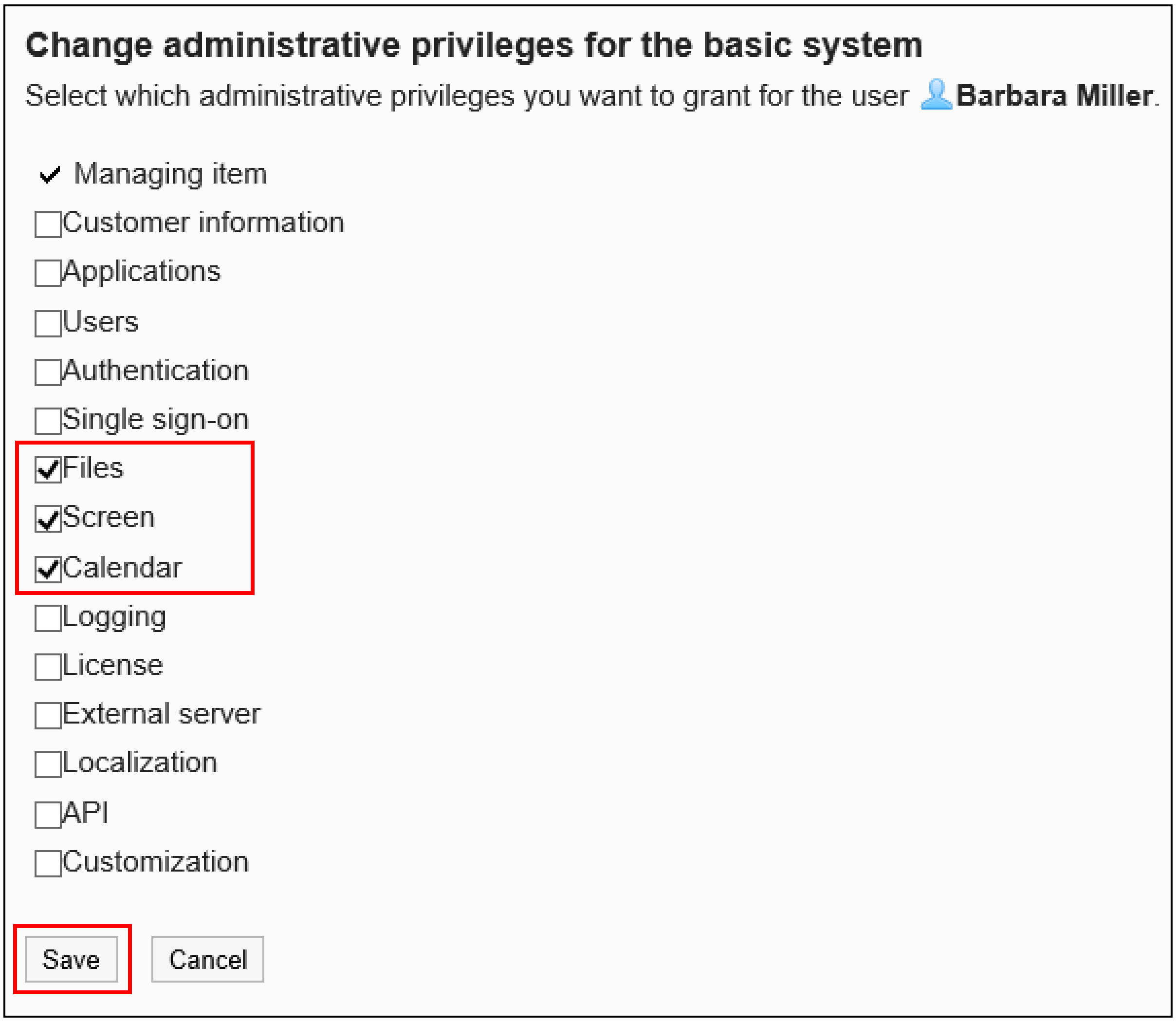
- The basic system administrator does not have permission to set up the basic system administrators and the application administrators.
  Only the system administrator can set the basic system administrators and the application administrators.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click the item for administrative permissions.**
5. **Click basic system administration privileges.**
6. **On the Basic System Administration Privileges screen, click "Change" for the organization, user, or role for which you want to change permissions.**



7. **On the screen for changing basic system administration privileges, select the check boxes of the administrative items you want to allow, and click "Edit".**



Deleting Administrative Privileges for Basic System

You can delete the basic system administrators.

Caution

- The deleted basic system administrators cannot be restored.

Selecting and Deleting Basic System Administration Privileges

You can select and delete the basic system administration privileges.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

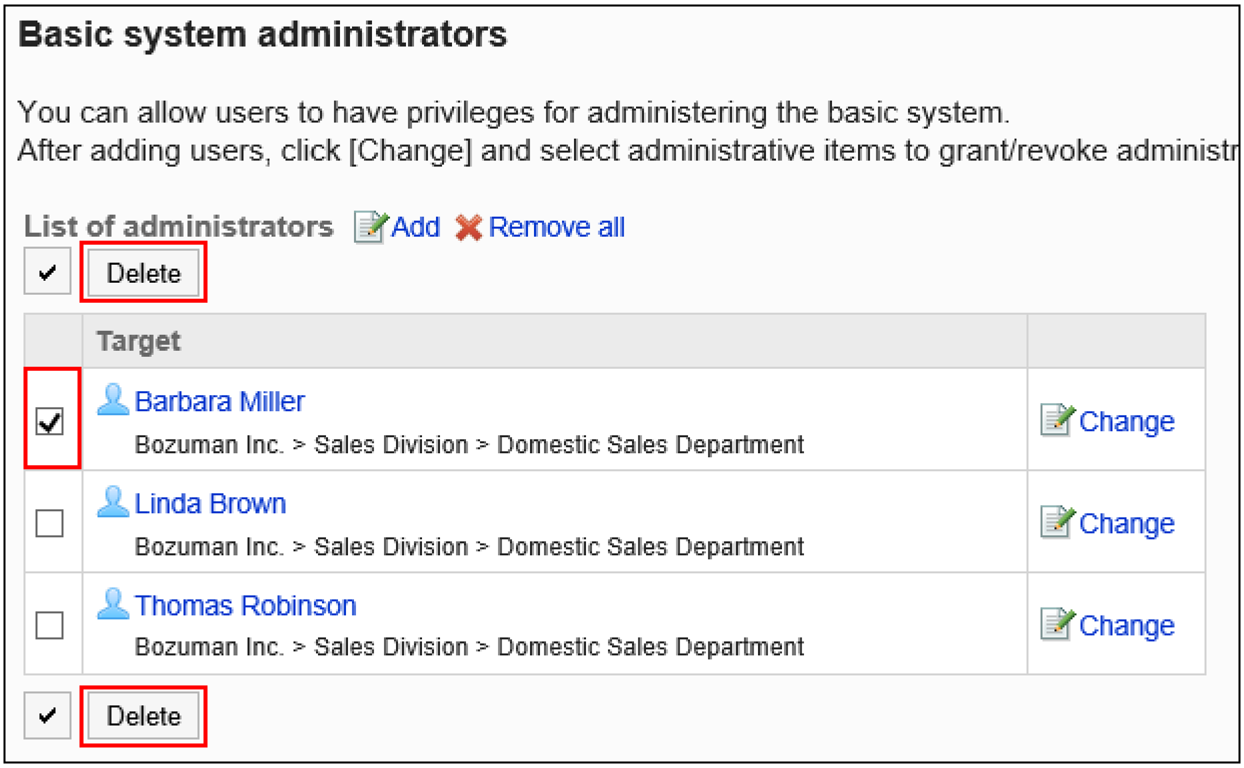
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click the item for administrative permissions.**

5. **Click basic system administration privileges.**

6. **On the basic system administration privileges screen, select the check boxes of the organizations, users, or roles you want to delete, and then click "Delete".**



7. **Click "Yes" on the screen for deleting all basic system administration privileges.**

Deleting All Administrative Privileges for Basic System

You can delete all administrative privileges for the basic system.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

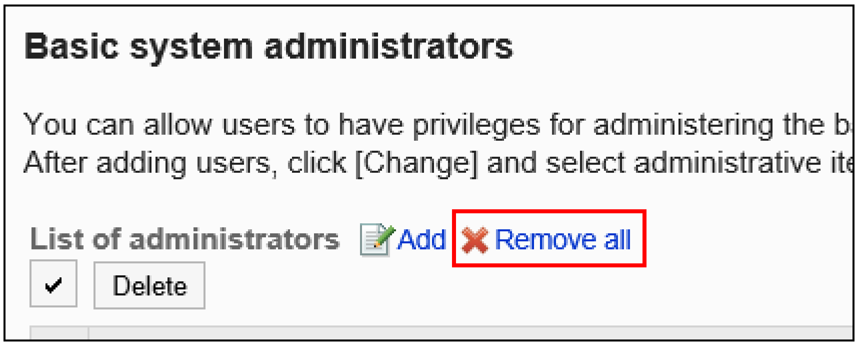
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click the item for administrative permissions.**

5. **Click basic system administration privileges.**

6. **On the screen for the basic system administration privileges, click "Delete All".**

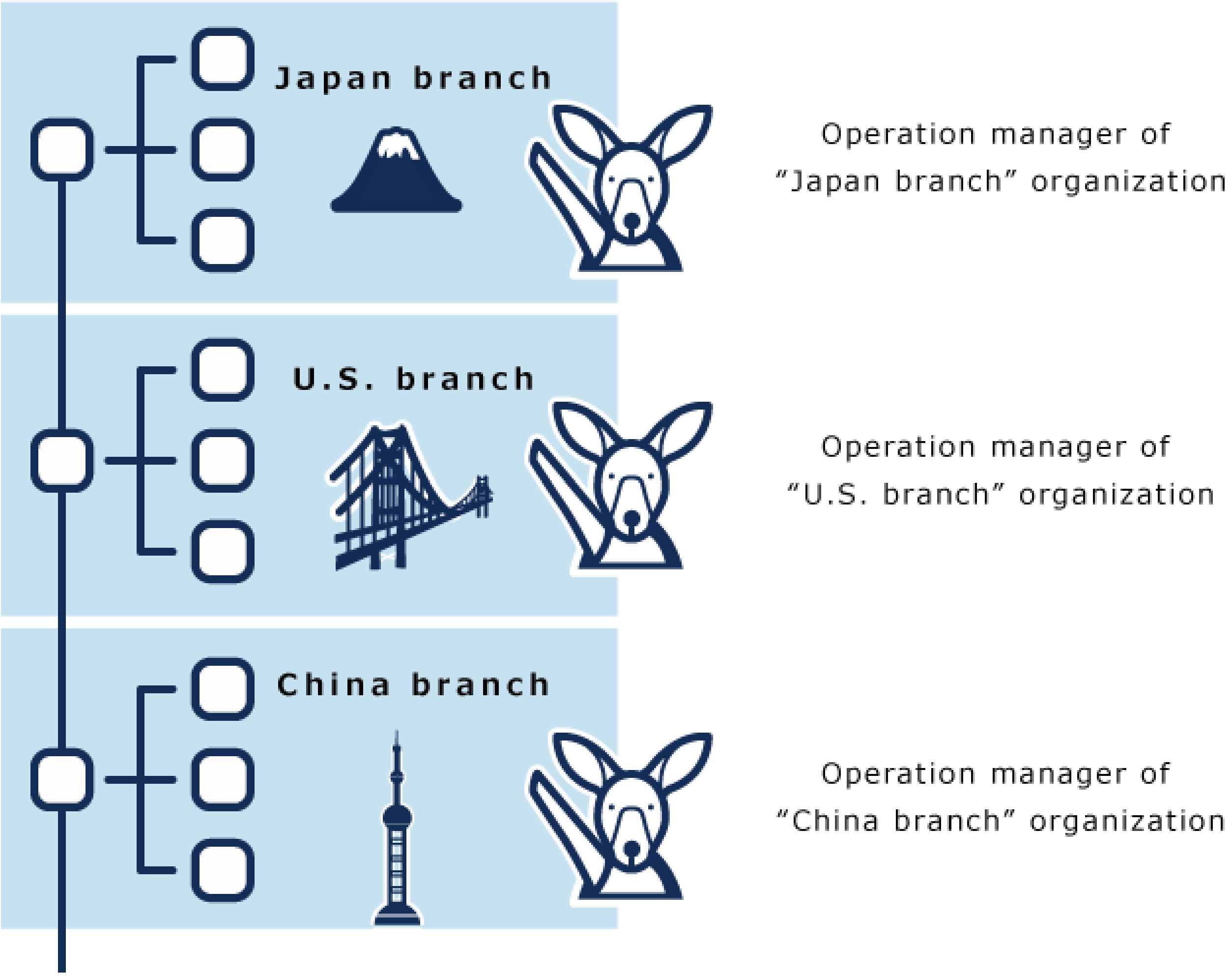


7. **Click "Yes" on the screen for deleting all administration privileges for basic system.**

Setting Up Operational Administrators for Your Organization

Set up operational administrators who perform administrative tasks for users and organizations in specific organizations.
The operational administrators of the organization will be appointed by the system administrator or by the basic system administrator.
For example, if you set up the operational administrators of the organization in each branch office, the tasks associated with the personnel change can be completed in each branch office.

Image of Usage



For details on operational administrators who administer organizations and users, see the description of managing operational administrators(106Page).

Setting Up Application Administrators

Set the administrator who has been granted administrative privileges for the application.

The application administrator can perform the same operations as the system administrator for authorized applications.

The system administrator appoints application administrators for each application.

Adding Administrative Privileges for Applications

To add an application administrator, grant the administrative privileges of the application to the organization, user, or role.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

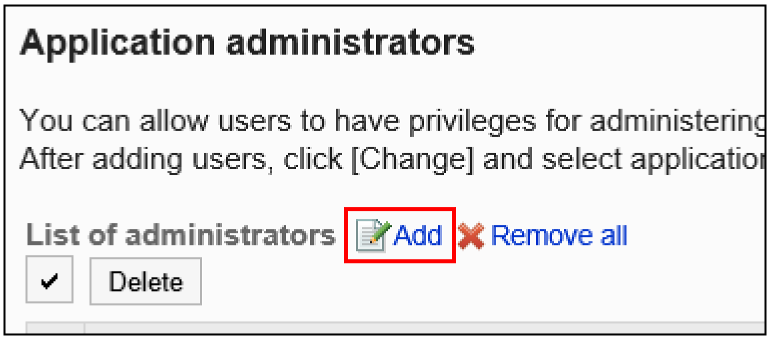
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click the item for administrative permissions.

5. Click the item for administrative privileges for applications.

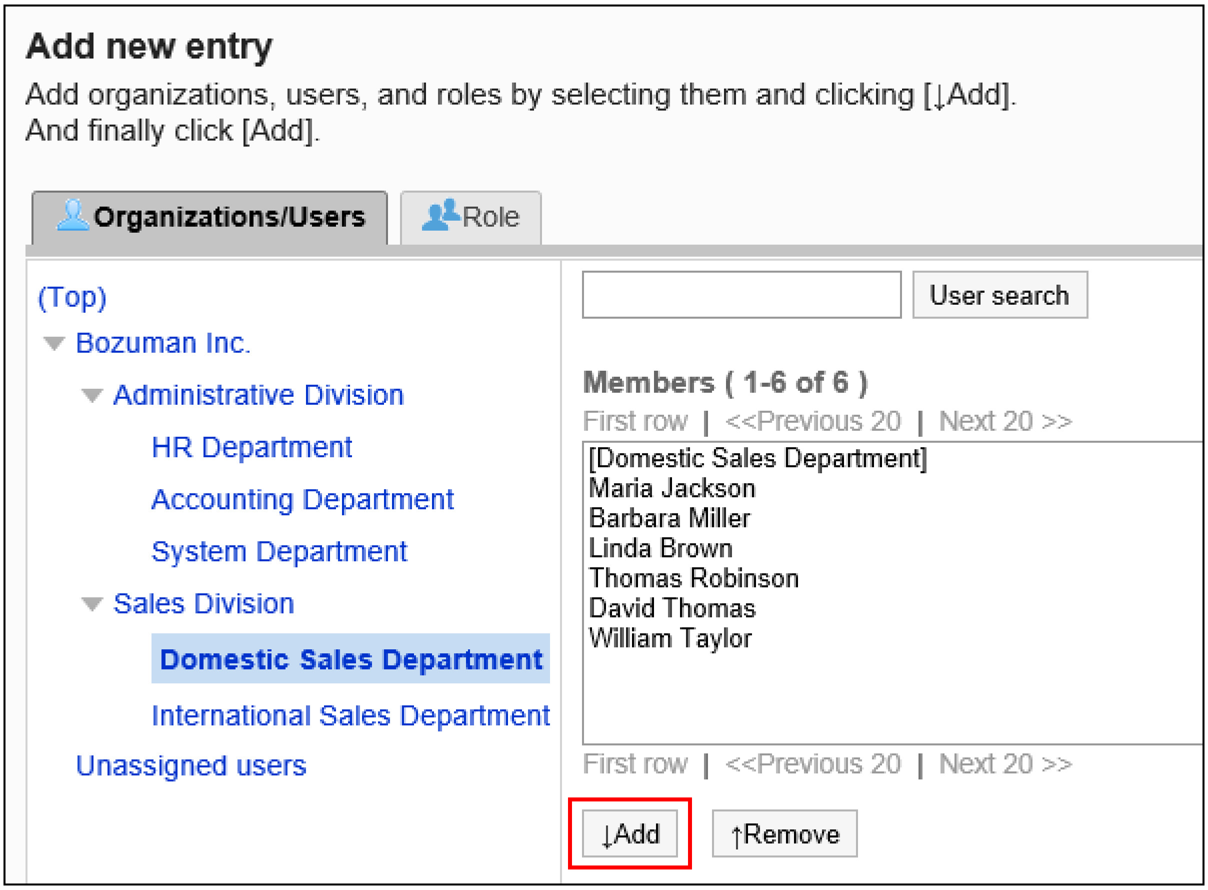
6. On the screen for application administrative privileges, click "Add".



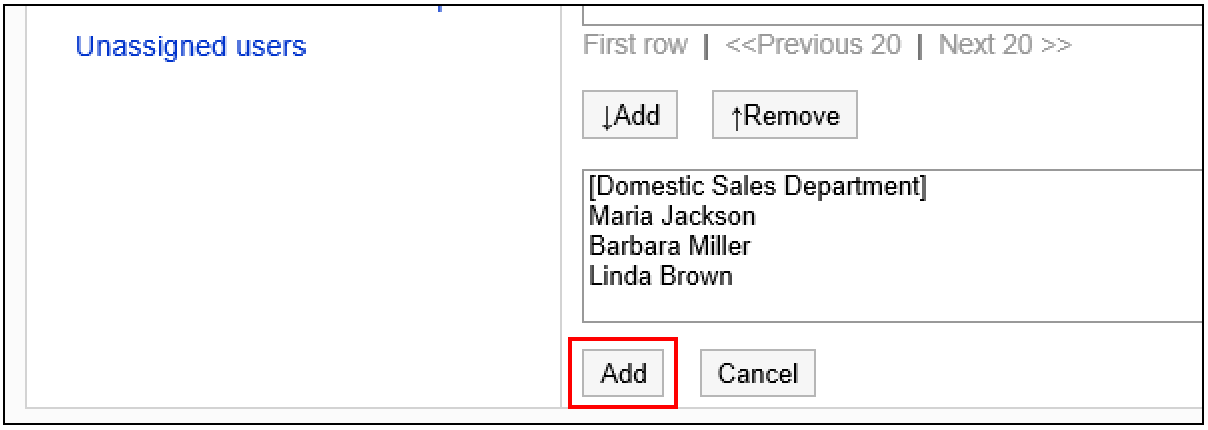
7. On the screen for adding administrative privileges for applications, select the organization, user, or role you want to add administrative privileges to, and click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



8. Click "Add".



The application administrator has no privileges with the default settings. You must change the administrative privileges for applications.

Changing Administrative Privileges for Applications

You configure functions that can be manipulated by the application administrators.

Steps:

1. Click the administration menu icon (gear icon) in the header.

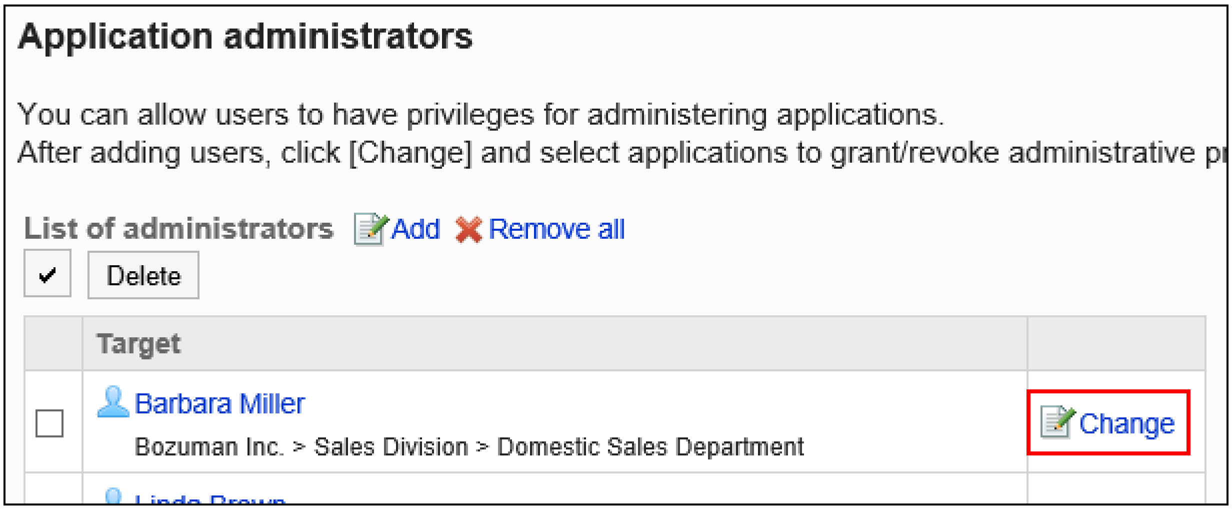
2. Click "System settings".

3. Select "Basic system administration" tab.

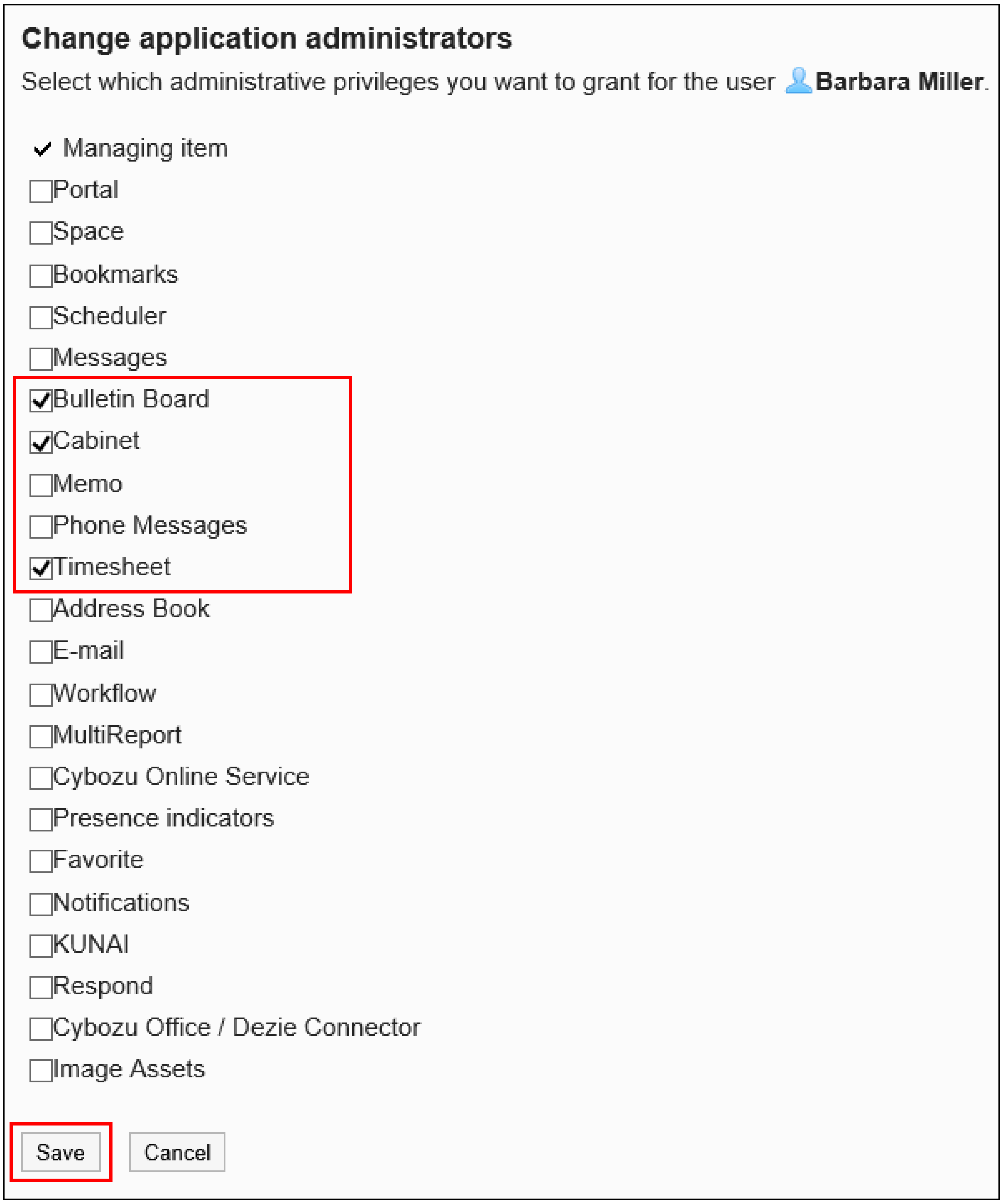
4. Click the item for administrative permissions.

5. Click the item for administrative privileges for applications.

6. On the Applications Administration Privileges screen, click "Change" for the organization, user, or role for which you want to change permissions.



7. On the screen for changing the administration privileges for applications, select the check boxes of the applications you want to allow, and click "Edit".



Deleting Administrative Privileges for Applications

You can delete the application administrators.

Caution

- The deleted application administrators cannot be restored.

Selecting and Deleting Administrative Privileges for Applications

You can select the administrative privileges for applications and delete them.

Steps:

1. Click the administration menu icon (gear icon) in the header.

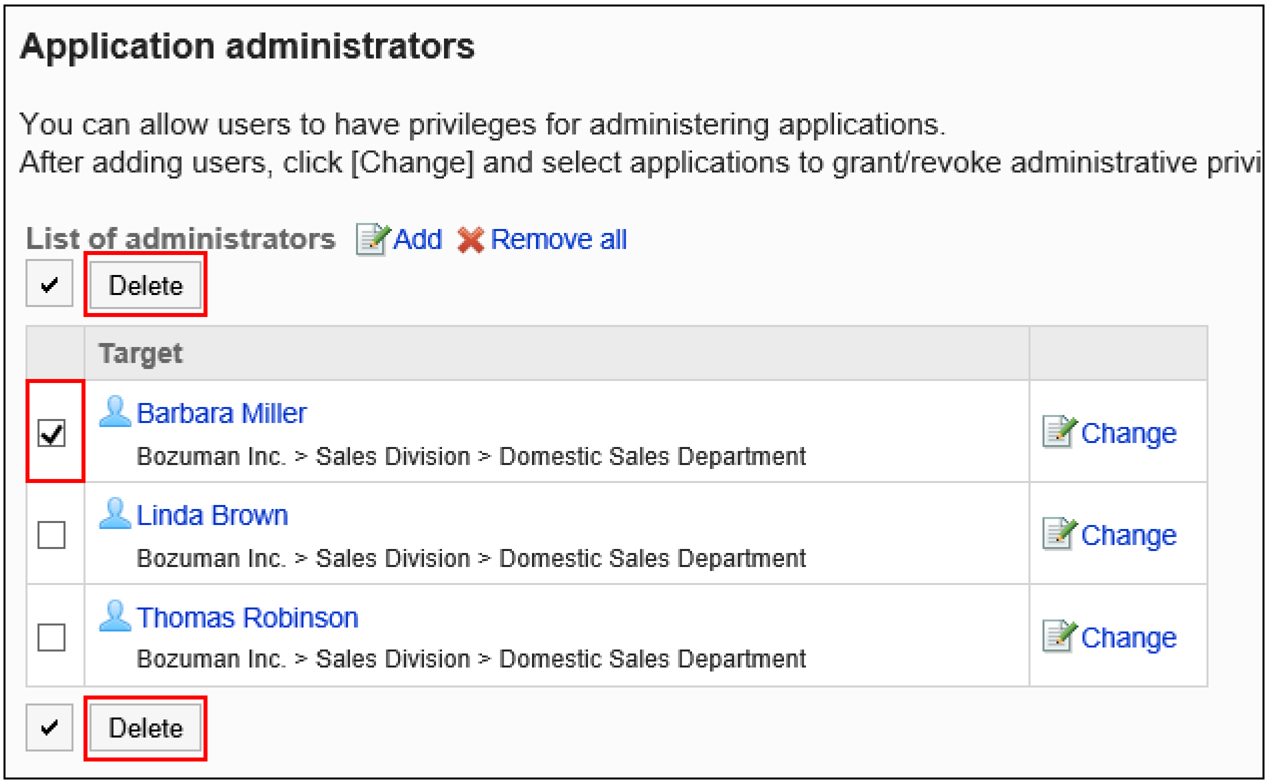
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click the item for administrative permissions.

5. Click the item for administrative privileges for applications.

6. On the administration privileges screen for applications, select the check boxes of the organizations, users, or roles you want to delete, and then click "Delete".



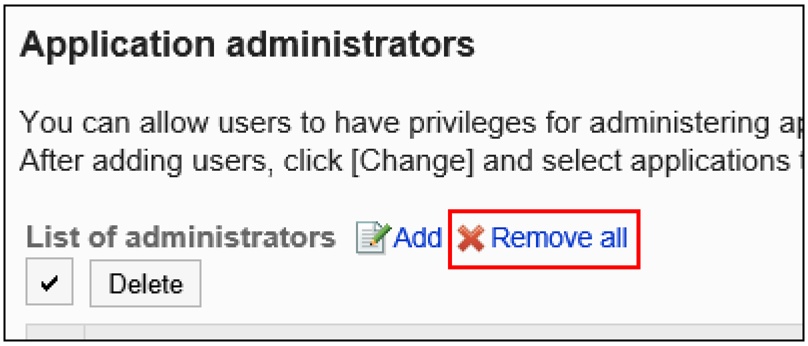
7. Click "Yes" on the screen for deleting all administration privileges for the application.

Deleting Administrative Privileges for All Applications

You can delete all administrative privileges for the application.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click the item for administrative permissions.**
5. **Click the item for administrative privileges for applications.**
6. **On the screen for application administrative privileges, click "Delete All".**



7. **Click "Yes" on the screen for deleting all administration privileges for the application.**

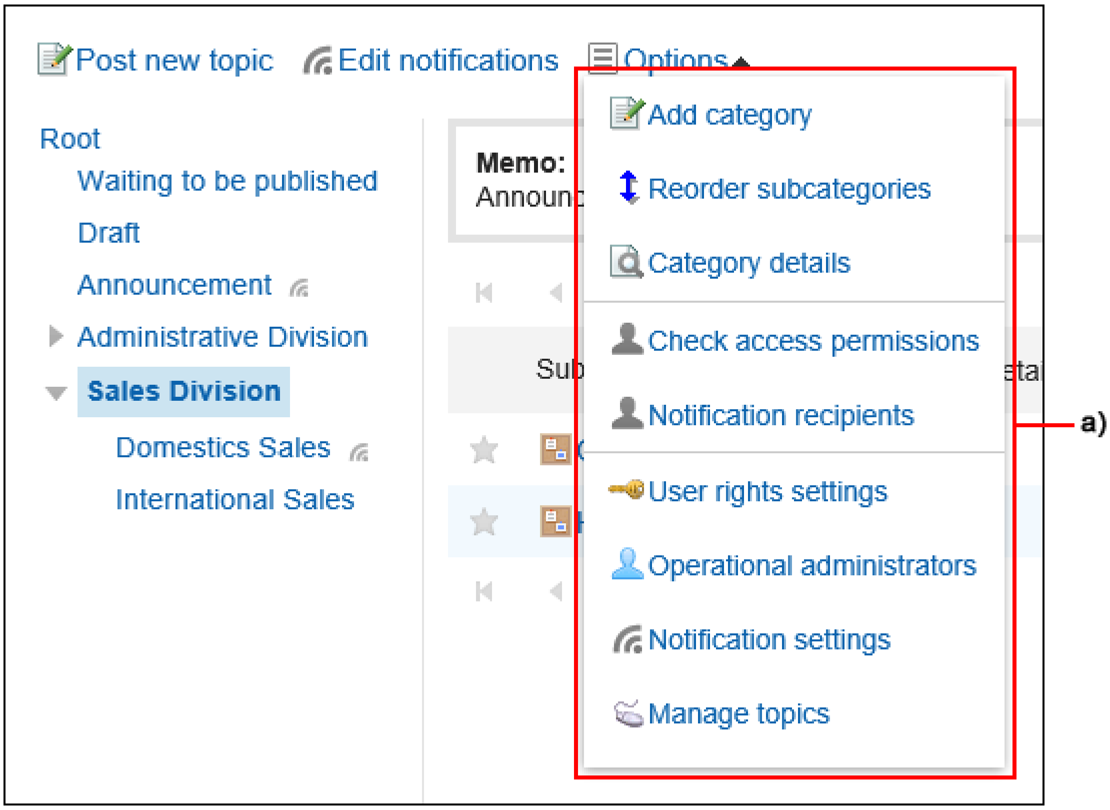
Setting up Operational Administrators

You can set operational administrative privileges for each application.

Operational administrators will see a menu of privileged administrative functions on their screen.

For information on manageable items, refer to operational administrative privileges for each application.

Example of operational administrators on bulletin board:



a): The menu of administrative functions used by operational administrators

The methods for setting up operational administrators vary by application.

- Portal

  Refer to the description of setting operational administrative privileges for portals(678Page).
- Bookmarks

  Refer to the description of setting operational administrative privileges for shared categories(807Page).
- Scheduler

  Refer to the description of setting operational administrative privileges for facility groups(875Page).
- Bulletin Board

  Refer to Setting Operational Administrative Privileges for Categories(962Page).
- Cabinet

  Refer to the description of setting operational administrative privileges for folders(1029Page).
- Address Book

  Refer to the description of setting operational administrative privileges for books(1135Page).
- Workflow

  Refer to Setting Operational Administrative Privileges for Categories(1262Page).
- MultiReport

  Refer to Setting Operational Administrative Privileges for Categories(1508Page).

1.2. About Access Permissions

This section describes the idea of access permissions in Garoon.

References

- Setting Access Permissions for Portal(639Page)
- Setting Access Permissions for Portlets(651Page)
- Setting Access Permissions for Shared Categories (Links)(813Page)
- Setting Access Permissions for Scheduler(907Page)
- Setting Access Permissions for Categories (Bulletin Board)(967Page)
- Setting Access Permissions for Folders(1036Page)
- Setting Access Permissions for Phone Messages(1074Page)
- Setting Access Permissions for Categories (Workflow)(1249Page)
- Setting Access Permissions for Categories (MultiReport)(1502Page)

1.2.1. User Rights

You can allow or restrict features that users can use, for each organization, user, or role.

Set the following permissions.

- Access Permissions
  Permissions for accessing categories and folders. For some applications, you can limit actions such as editing and deleting.
  In combination with the security model, you can set what you allow or disallow.
- Permission
  User is authorized to use the features of the application.
  In combination with the security model, you can set what you allow or disallow.

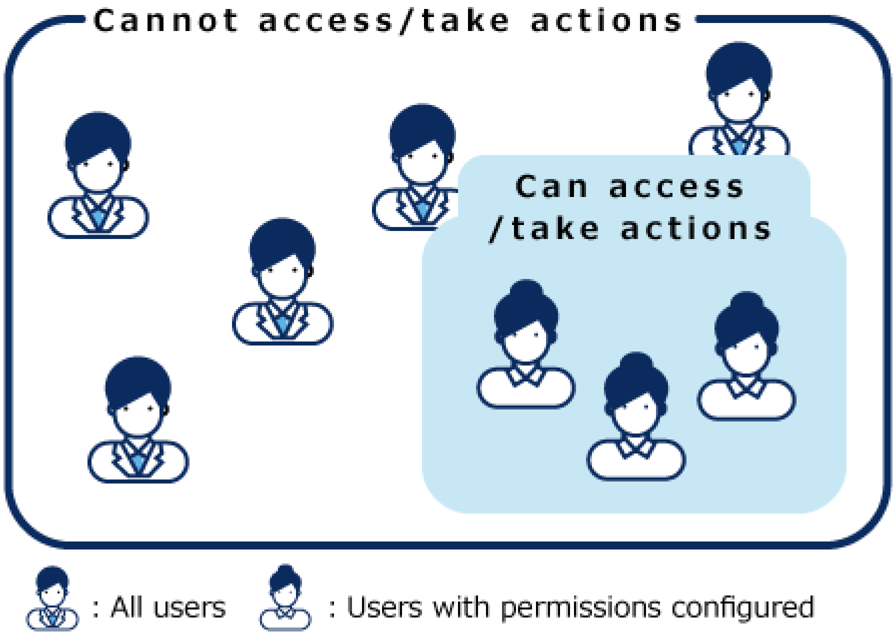
Security Model

Security model is a feature that allows you to select targets to allow actions, or to select targets to prohibit actions.
If you change to the appropriate security model, targets for which you set access permissions are reduced, and it becomes easier to manage.

Select one of the following security models.

GRANT (Only users on the list have access)

Set organizations, users, or roles that you want to allow actions.
When you set access permissions for organization or role, they are applied to all users who are members of the organization or the role.



REVOKE (All users have access except users on the list)

Set organizations, users, or roles that you want to prohibit actions.
When you set access permissions for organization or role, they are applied to all users who are members of the organization or the role.

Changing the Security Model

You can change the security model on the screen to set access permissions and rights.

You can select one of the followings.

- GRANT (select targets to allow actions):
  Select organizations, users, or roles that you want to allow actions.
- REVOKE (select targets to restrict actions):
  Select organizations, users, or roles that you want to restrict actions.

Caution

- If you change the security model, access permissions are initialized. The initialized access permissions cannot be restored.

Here we provide an example of changing the security model for the "Domestic Sales Department" category in the bulletin board.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

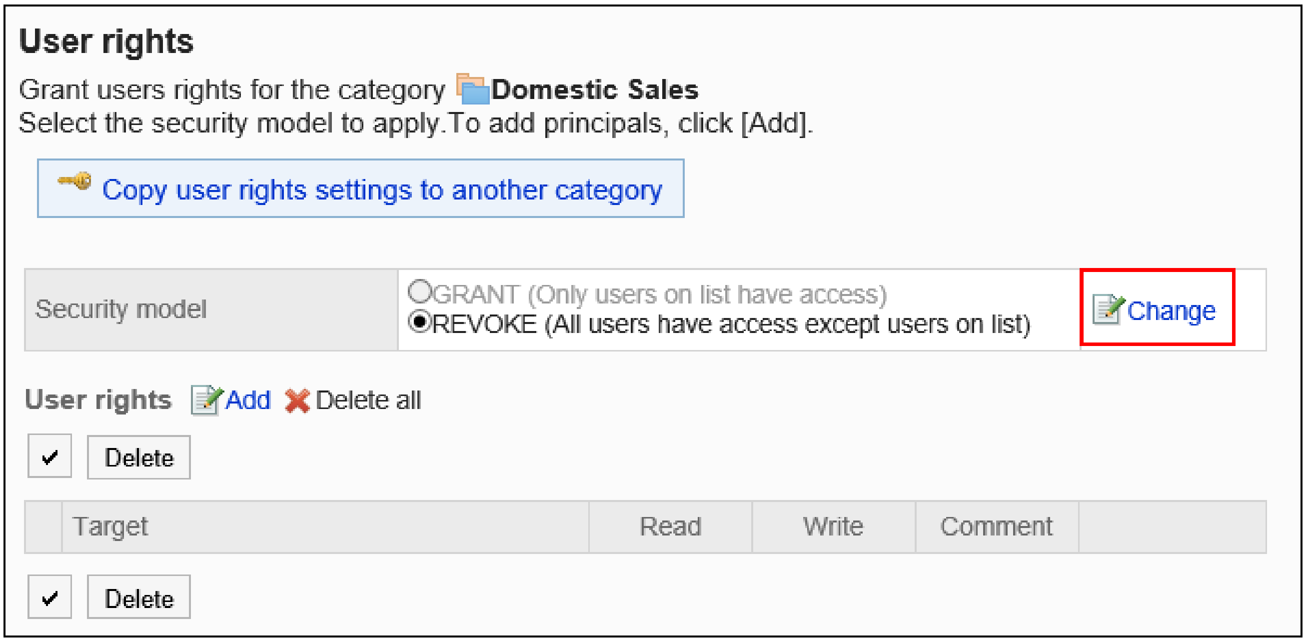
3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

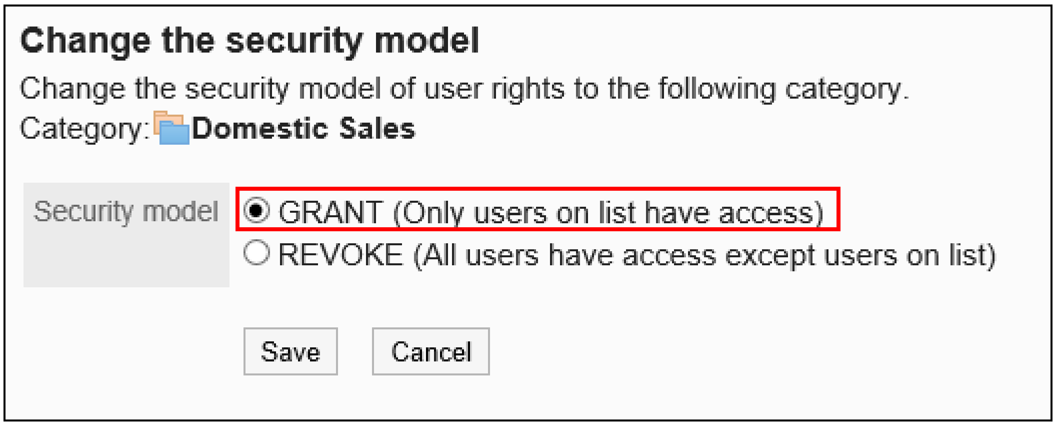
5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select the "Domestic Sales Department" category and click "Edit".**

7. **On the "User Rights" screen, click "Change" in the "Security Model".**



8. **On the "Change Security Model" screen, change the security model and click "Edit".**



9. **Click "Yes" on the "Change Security Model" screen.**

User Rights

By setting access permissions, you can limit actions users can perform, such as actions against bulletin board categories and file management folders.
Access permissions can be set for each organization, user, or role.
For example, only users who are members of the board and the members of the secretarial department can view the "Confidential" category in the bulletin board.

You can set access permissions in the following applications.

- Portal
- Portlet
- Bookmarks
- Scheduler
- Bulletin Board
- Cabinet
- Phone Messages
- Workflow
- MultiReport

For details on prioritized access permissions when a target has more than one access permissions, refer to the "Prioritized Access Permissions(51Page)" section.

Permission

By setting permissions, you can limit the use of some application features, such as the My portal and the Personal Address Book.
Permissions can be set for each organization, user, or role.
For example, only users who belong to the General Affairs Department or the Sales Department can use the shared address book.

You can set permissions in the following applications

- Portal
- Address Book
- KUNAI

1.2.2. Prioritized Access Permissions

When you set permissions for organizations, users, and roles, multiple access permissions and rights may be set for one user.
This section describes access permissions that are prioritized when any access conflict exists.

Caution

- Access permissions that are set for the parent organization are not inherited by the child organization.

Differences in Prioritized Permissions Based on Security Models

If one user has multiple access permissions, the priority is dependent on the security model.

- If the security model is GRANT (select a target):
  If actions are allowed in any of the settings, that setting takes priority.
- If the security model is REVOKE (select a target to be limited):
  If actions are restricted in any of the settings, that setting takes priority. If actions are restricted in one setting, user cannot perform the actions.

Here, we provide an example of access permissions for the "Contact" category in Kato's bulletin board.
Kato is a member of the General Affairs Department and the Accountant role.
Actions allowed for Kato's "Contact" category are as follows

If the security model is "GRANT (Only users on the list have access)"

Access Permissions	View	Read	Adding a comment
Organization (General Affairs Department)	✔		
Role (Accountant)	✔	✔	
User (Daisuke Kato)	✔		✔

⬇

Actions allowed for Kato	View	Read	Adding a comment
Topics in the "Contact" category	✓	✓	✓

If the security model is "REVOKE (All users have access except users on the list)"

Access Permissions	View	Read	Adding a comment
Organization (General Affairs Department)	✓		
Role (Accountant)	✓	✓	
User (Daisuke Kato)	✓	✓	✓

Actions allowed for Kato	View	Read	Adding a comment
Topics in the "Contact" category	✓		

Prioritized Permissions for Scheduler and Phone Messages

Here we describe prioritized permissions for schedulers and phone messages.

Scheduler

Users who have access permissions for schedulers can view, add, change, or delete appointments of the target organization or user.

Following access permissions can be set for schedulers.

- Access permissions for the schedule of the organization
- Access permissions for schedules of users who are members of the organization or the role.
- Access permissions for the schedule of the user.
- Access permissions for reservations of facilities belonging to a facility group
- Access permissions for reservations of facilities.

Phone Messages

Users who have access permission for phone messages can add or view phone messages of the target user.

Following access permissions can be set for phone messages.

- Access permissions for phone messages of users who are members of the organization or the role.
- Access permissions for phone messages of the user.

When you set access permissions for schedulers and phone messages, you can, for example, allow only users who belong to the secretarial department to add appointments and phone messages of the president.

When you set access permissions for schedulers and phone messages of organizations and roles, different access permissions may be set for scheduler and phone messages of one user.
If different access permissions are set, prioritized permissions are as follows.

When Organizations, Users, and Roles Have Different Permissions

If different permissions are set for organizations, users, and roles, permissions granted to users will prevail.

Here, we provide an example of Kato's access permission for Yoshida's schedule.
Yoshida belongs to the organization "Information System Department" and the role "Department Manager".

Access permissions held by Kato	View	Add	Change	Delete
Organization (Information Systems Department)	✓	✓	✓	
Role (Director)	✓	✓		
User (Makoto Yoshida)	✓			

Actions allowed for Kato	View	Add	Change	Delete
Yoshida's schedule	✓			

When Different User Rights Are Set Only for Organizations and Roles

If a user has no access permissions, and the organization or role has different access permissions, permissions granted to the organization or the role will prevail.

Here, we provide an example of Kato's access permission for Yoshida's schedule.
Yoshida belongs to the organization "Information System Department" and the role "Department Manager".
Access Permissions are not set for Yoshida's scheduler.

Access permissions held by Kato	View	Add	Change	Delete
Organization (Information Systems Department)	✓		✓	
Role (Director)	✓	✓		
User (Makoto Yoshida)				

Actions allowed for Kato	View	Add	Change	Delete
Yoshida's schedule	✓	✓	✓	

When Different User Rights Are Set Only for Facility Groups and Facilities

When a facility group reservation and a facility reservation have different access permissions, the permissions set to both reservations apply to the facility reservation
If access permissions are set only for a facility group reservation, the permissions for the facility group also apply to the facility reservation.

Here, we provide an example of Kato's access permissions for reservation of the conference room 1 and the conference room 2.
The conference room 1 and the conference room 2 belong to the "Conference Room" facility group.
Kato has different access permissions for reservation of the "Conference Room" facility group and the "Conference Room 1" facility.
Access permissions have not been set for reservation of the "Conference Room 2" facility.

Access permissions held by Kato	View	Add	Change	Delete
Facility Group (Conference room)	✓	✓	✓	
Facility 1 (Conference Room 1)	✓		✓	✓

Access permissions held by Kato	View	Add	Change	Delete
Facility 2 (Conference Room 2)				

Actions allowed for Kato	View	Add	Change	Delete
Reservation of the Conference Room 1	✓		✓	
Reservation of the Conference Room 2	✓	✓	✓	

1.3. User

This section describes how to manage Garoon users and their organizations.

References

- Managing Organizations(55Page)
- Setting Up Users(68Page)
- Role Settings(114Page)

1.3.1. Organization Settings

This section describes organization settings.

References

- Adding Organizations(56Page)
- Changing Organizations(59Page)
- Setting Up Users(68Page)
- Role Settings(114Page)

1.3.1.1. Adding Organizations

You can add organizations. Organizations can contain nested organizations.
You can keep an existing organization hierarchy, or add groups such as "new employees" and "temporary projects" as organizations to the hierarchy.

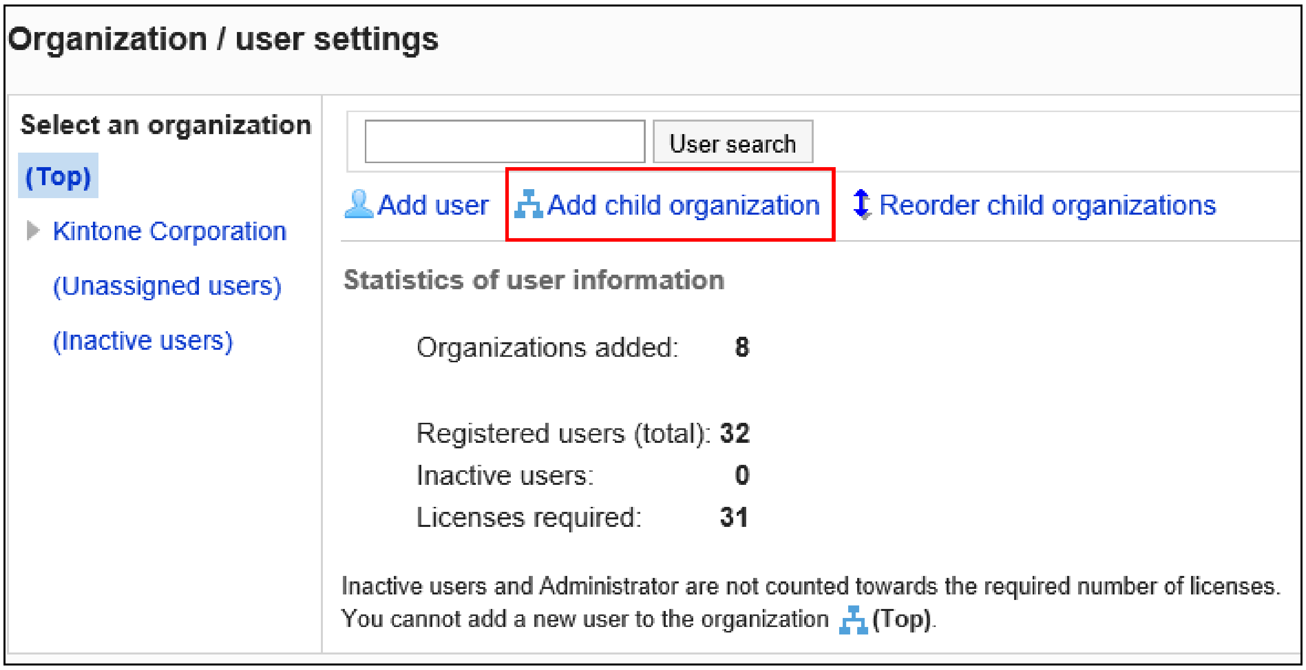
Caution

- If there are more than 63 tiers of organizations, an error occurs when you migrate from the package version to the cloud version. If you want to create organizations hierarchically, we recommend that you limit the number of tiers to no more than 62.

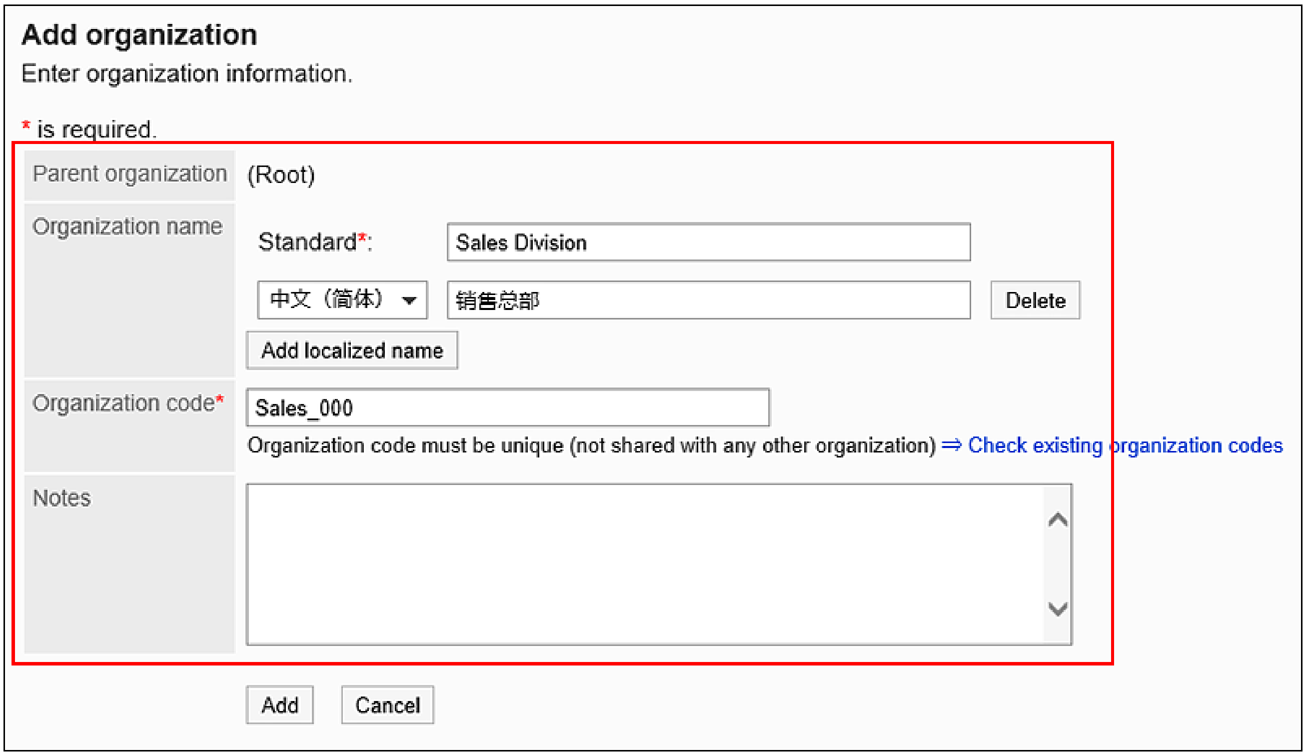
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**

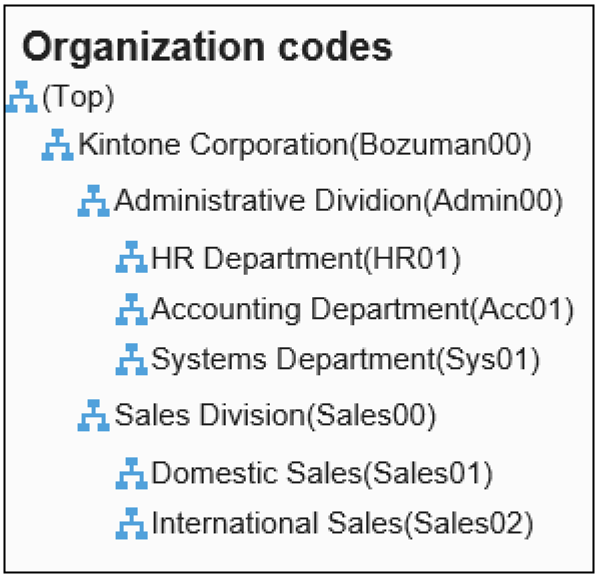
6. **On the organization/user setting screen, select "(Top)" or an organization, and click "Add Child organization".**

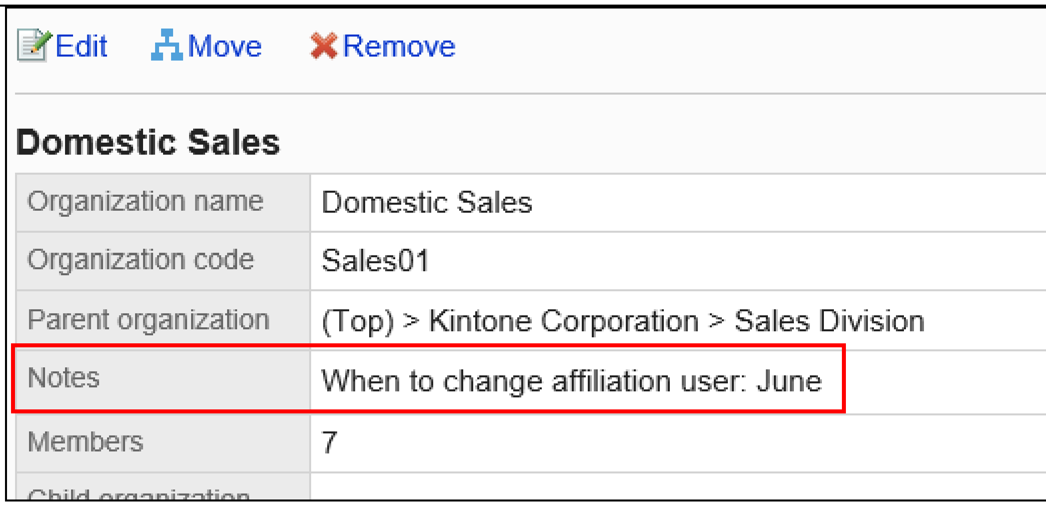


7. **On the screen to add organizations, set the required items.**



Items for setting organizations

Item	Description
Organization name data	Always set a standard organization name. You can set the organization name in multiple languages by clicking "Add localized name". If you do not set the organization name in the user defined language, the default organization name is displayed. The following languages can be set: • 日本語 • English • Simplified Chinese • Traditional Chinese Displayed in Traditional Chinese.
Organization code	The organization code must be set. This is a unique code for identifying an organization. Clicking "Check existing organization codes" displays a list of the organization codes used in Garoon. 
Memo	Enter a description of the organization. The memo entered will be displayed only on the organization details screen of the system administration. It will not be displayed in the user screen.

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td></td><td>
</td></tr>
</table>

8. **Confirm your settings and click "Add".**

1.3.1.2. Editing Organizations

This section describes how to change organization information.

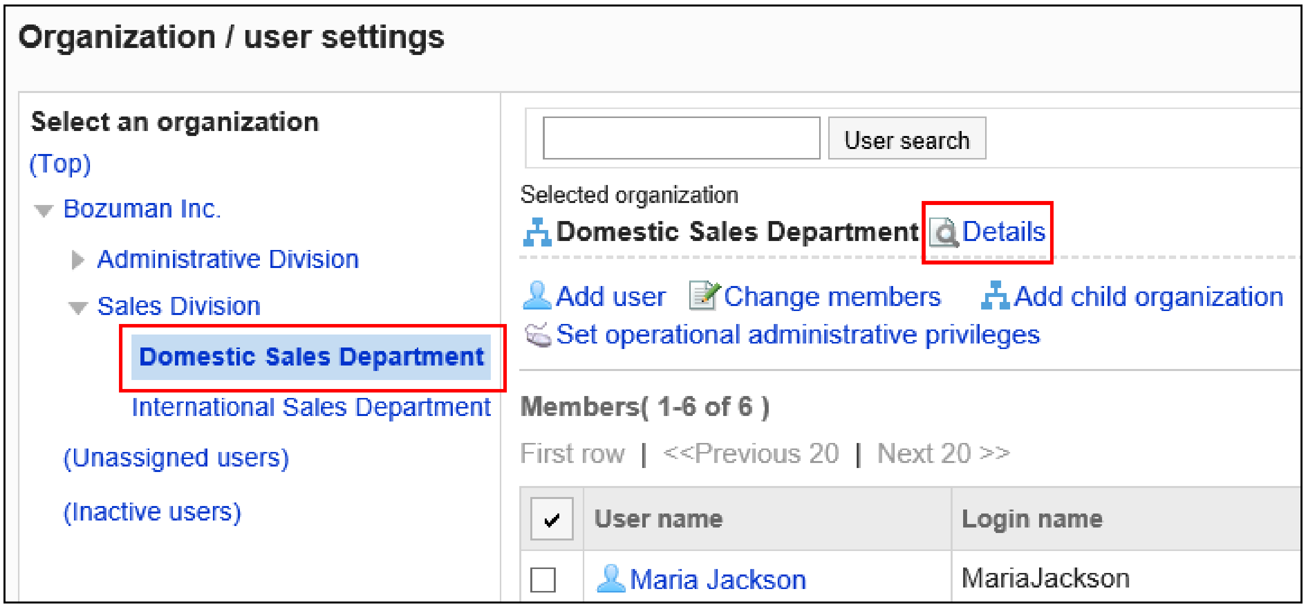
Editing Tentative Organization's Information

You can change the organization information.

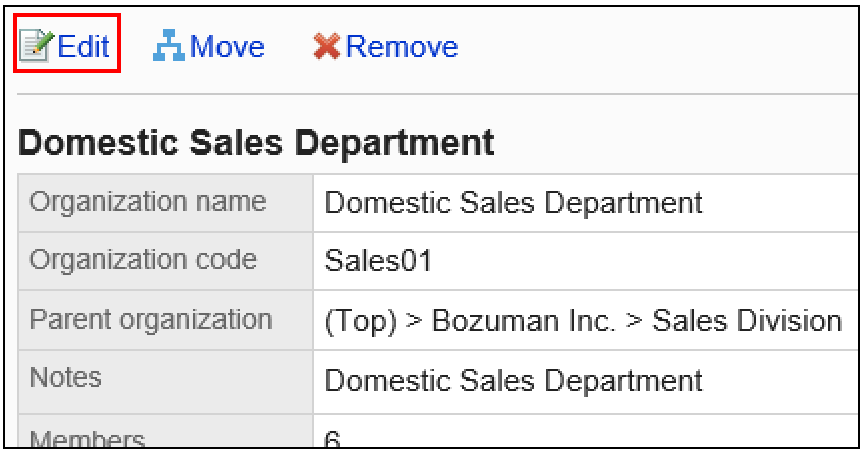
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select an organization and click Details.**



7. **On the organization details screen, click "Edit".**



8. **On the screen to change organization information, change the fields as necessary.**

For details, see the items for setting organizations(57Page).

9. **Confirm your settings and click "Save".**

Note

- You cannot change the parent organization on the screen to change organization information. To change the parent organization, you must move the organization.
  For details, see the "Moving Organizations(64Page)" section.

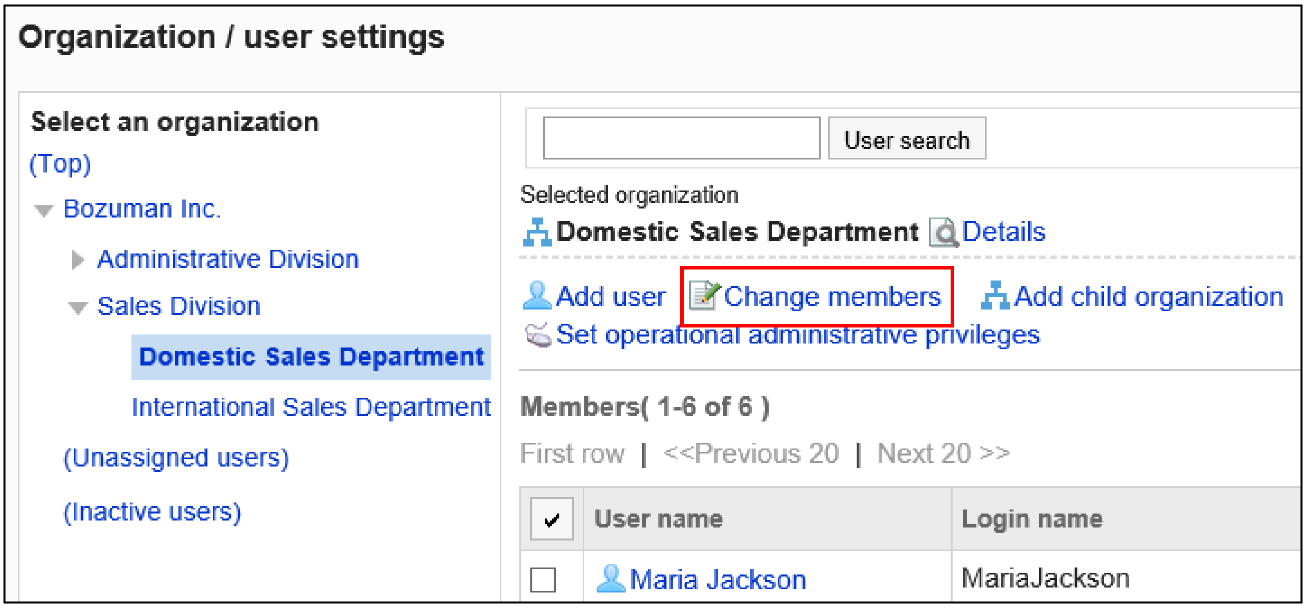
- If the organization or organization name you changed does not appear on the organization/user setting screen, select "(top)", or logout from the System Administration screen and log in again.

Assigning Users to a Tentative Organization

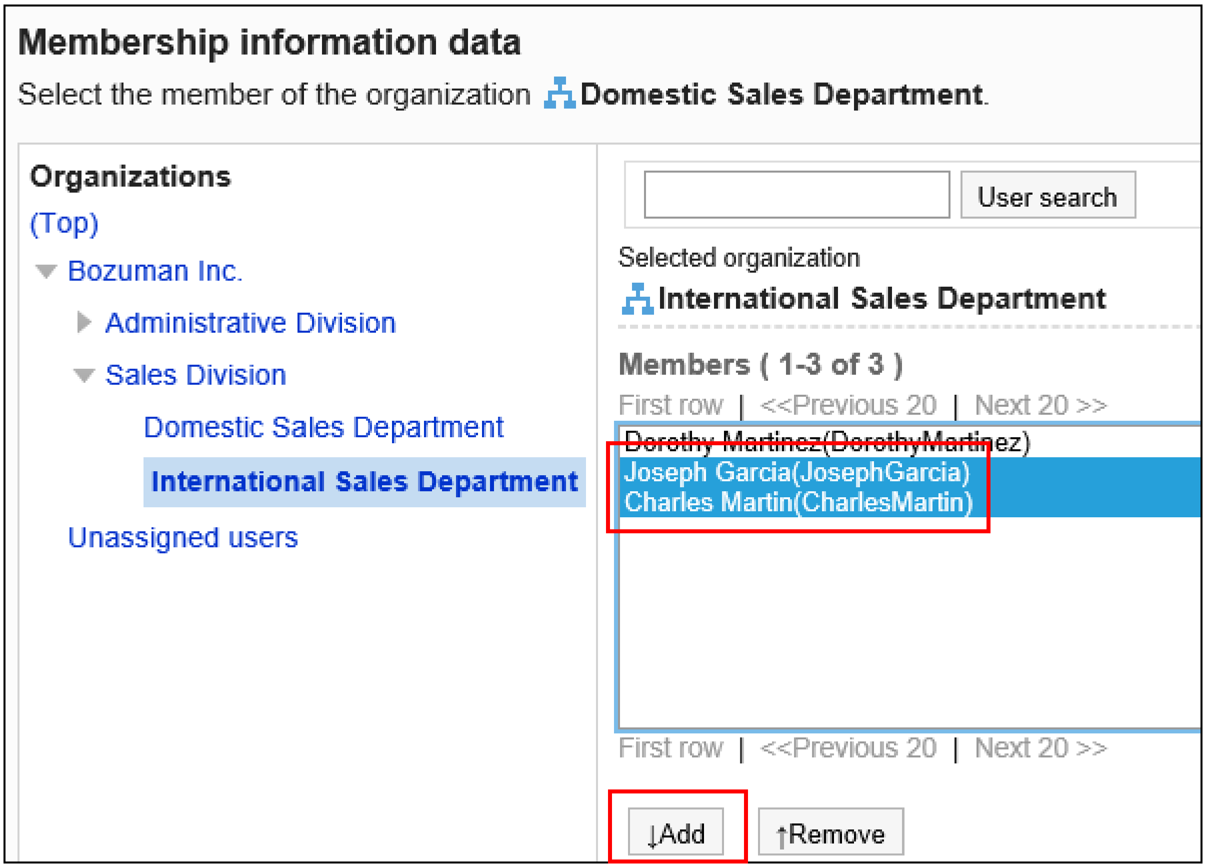
You can assign users who do not belong to any organization or users who belong to other organization to the specified organization.

Steps:

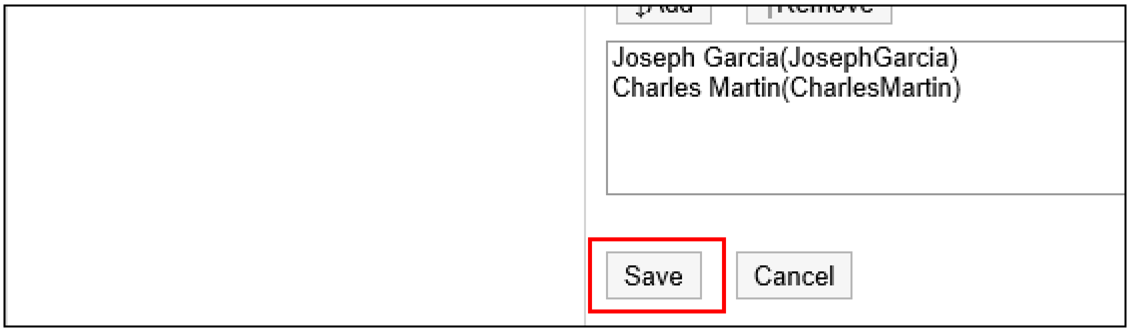
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization, and then click "Change Members".**



7. **On the membership information data screen, select the user who you want to assign to the organization, and then click "Add".**



8. **Click Save.**



Removing Users from Their Organizations

Remove users from the organization.

Users who do not belong to any organization will automatically be added to the Unassigned users.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

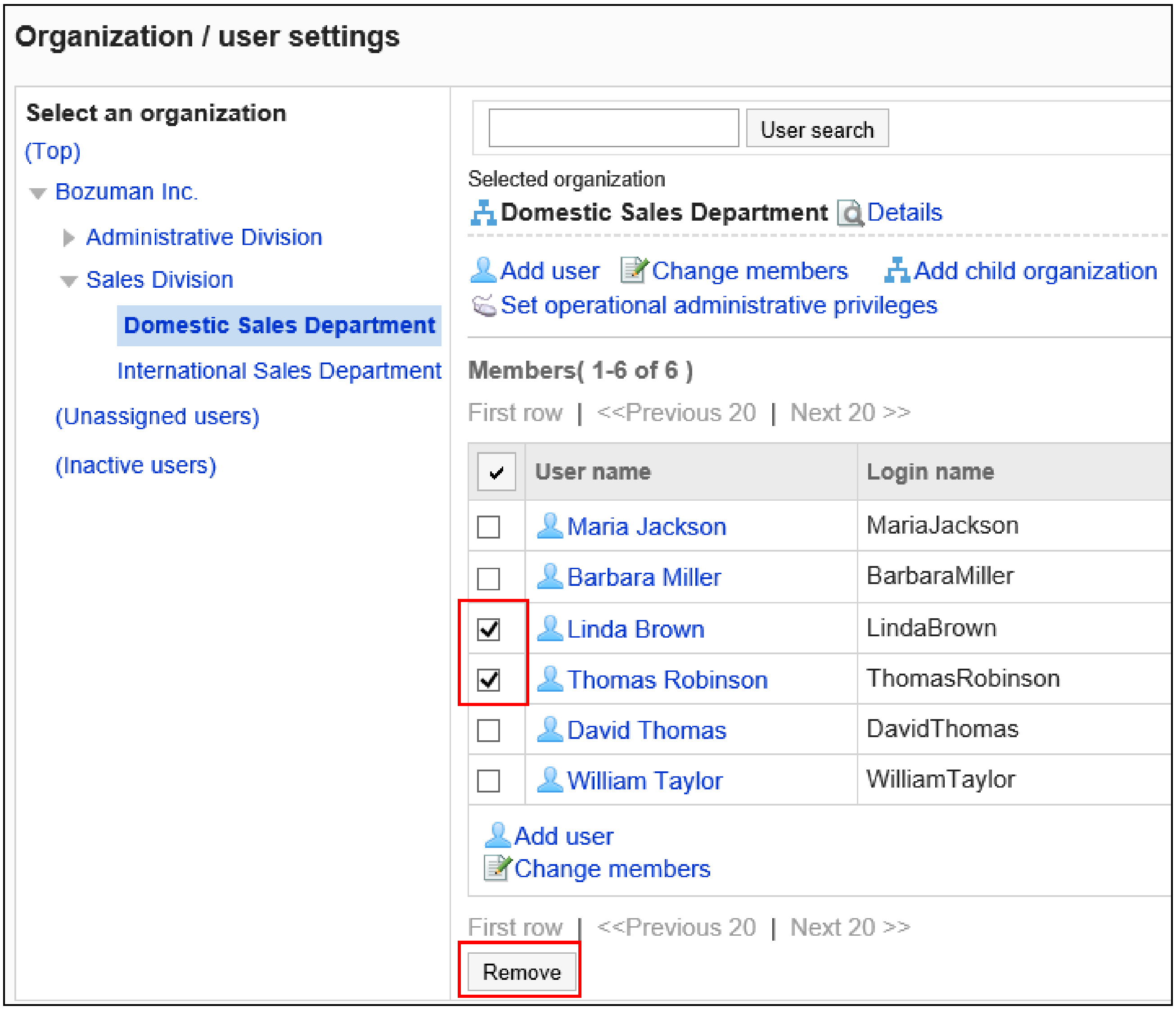
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select the organization, select the check box of the user you want to remove from the organization, and click Remove.**



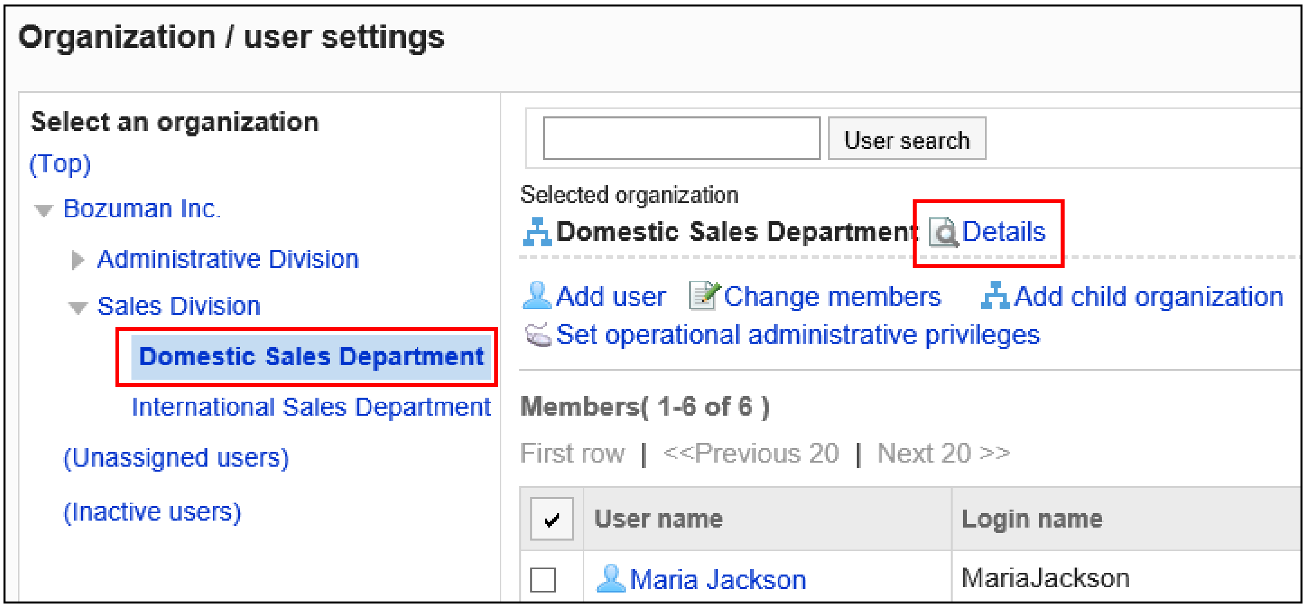
7. **Click "Yes" on the screen to delete all users.**

1.3.1.3. Moving Organizations

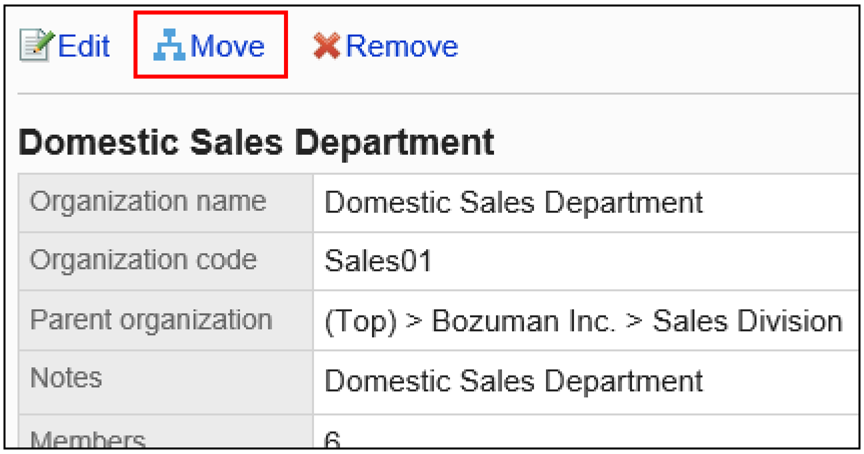
Move child organizations to the top or to other organizations. Moving an organization also moves child organizations of that organization.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization and click Details.**



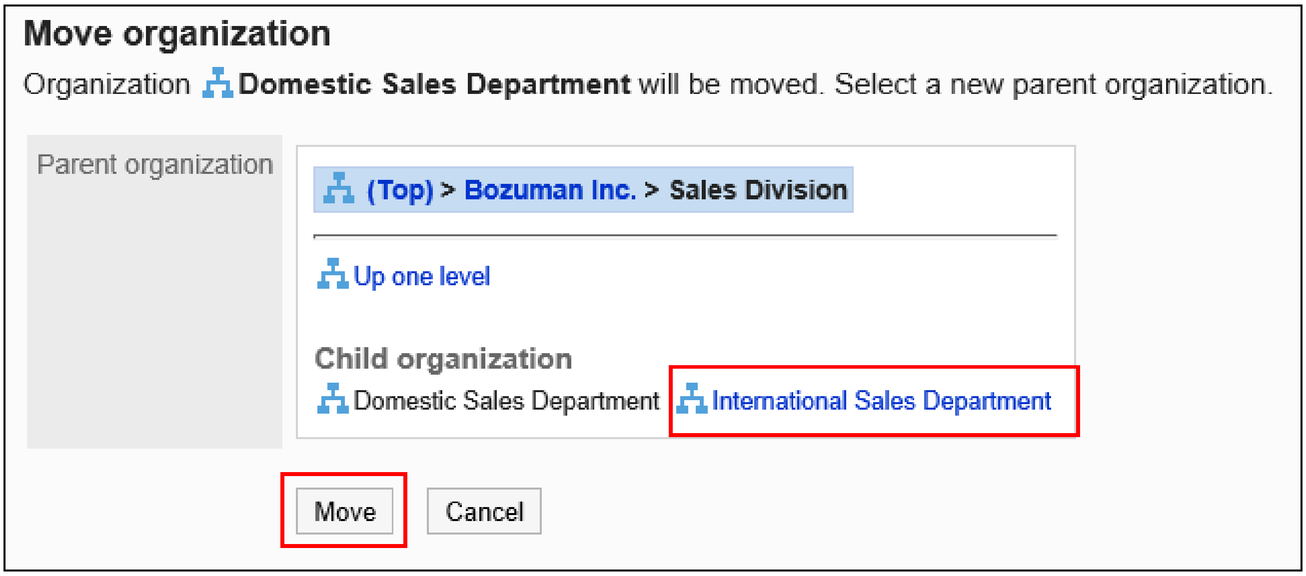
7. **On the organization details screen, click "Move organization".**



8. On the screen to move organizations, select the destination parent organization, and then click "Move".

Clicking "Move up" moves the organization up one level.

Clicking an organization name moves to the child organization you clicked.



1.3.1.4. Reordering Child Organizations

You can reorder organizations in the same hierarchy.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

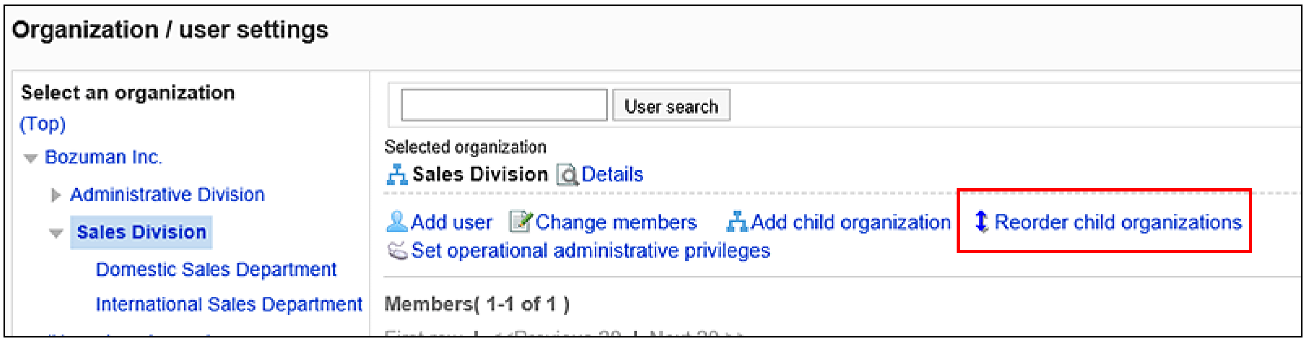
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

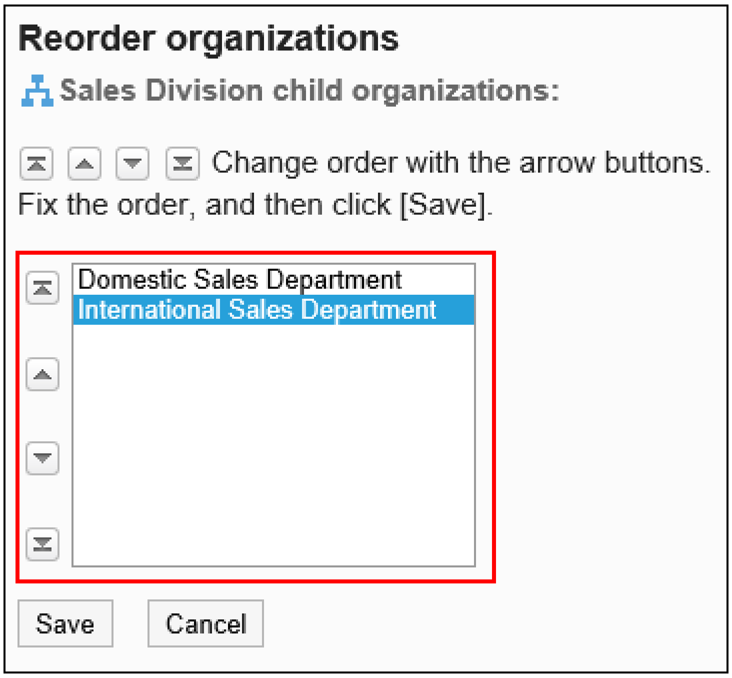
4. **Click Users.**

5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select "Top" or an organization, and click "Reorder child organizations".**



7. **On the screen to reorder organizations, reorder child organizations.**



8. **Confirm your settings and click "Save".**

1.3.1.5. Deleting Organizations

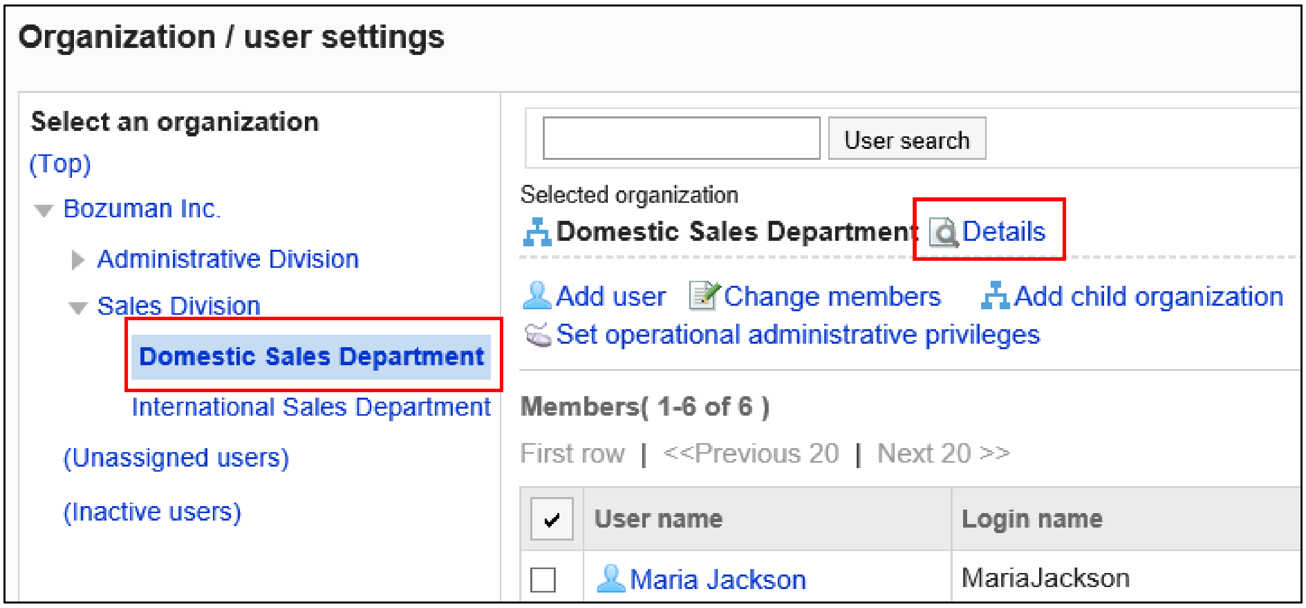
If you delete an organization, all its child organizations will also be deleted.
The user whose organizations are deleted will automatically be added to the Unassigned users.
If you delete an organization, all its permissions and operational administrative privileges are also deleted.

Caution

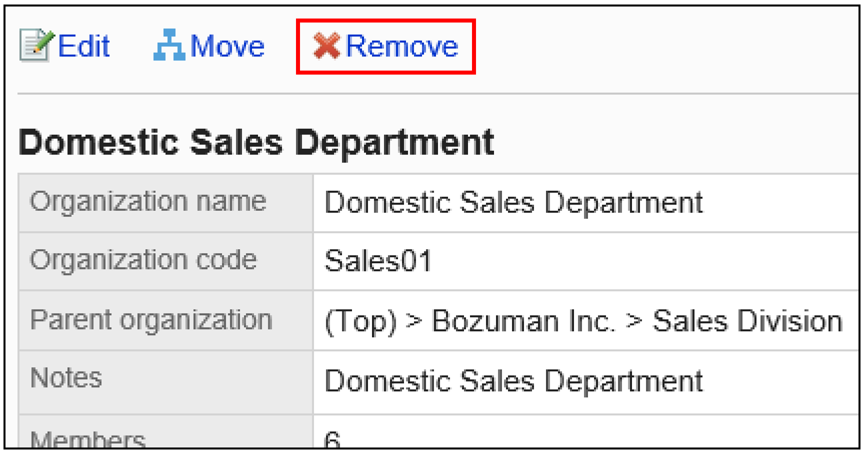
- The deleted organization cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization and click Details.**



7. **On the organization details screen, click "Delete".**



8. Click "Yes" on the screen to delete organizations.

1.3.2. Managing Users

This section describes how to set up users.

References

- Adding Users(68Page)
- Editing User Profile(76Page)
- Deactivating Users(82Page)
- Limitations on Passwords(102Page)
- Setting Up Operational Administrators for Your Organization(106Page)

1.3.2.1. Adding Users

You can add users and assign them as members of the specified organization.

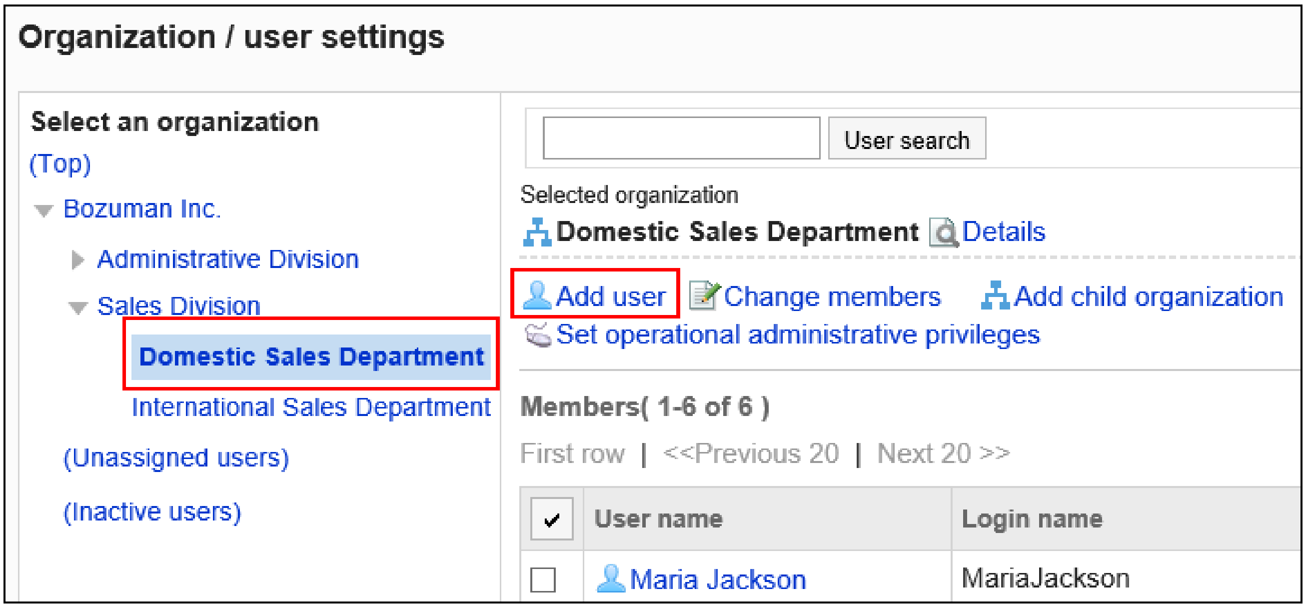
You cannot add users to "(top)". If you select "(top)" to add users, the added users will not belong to any organization.

Note

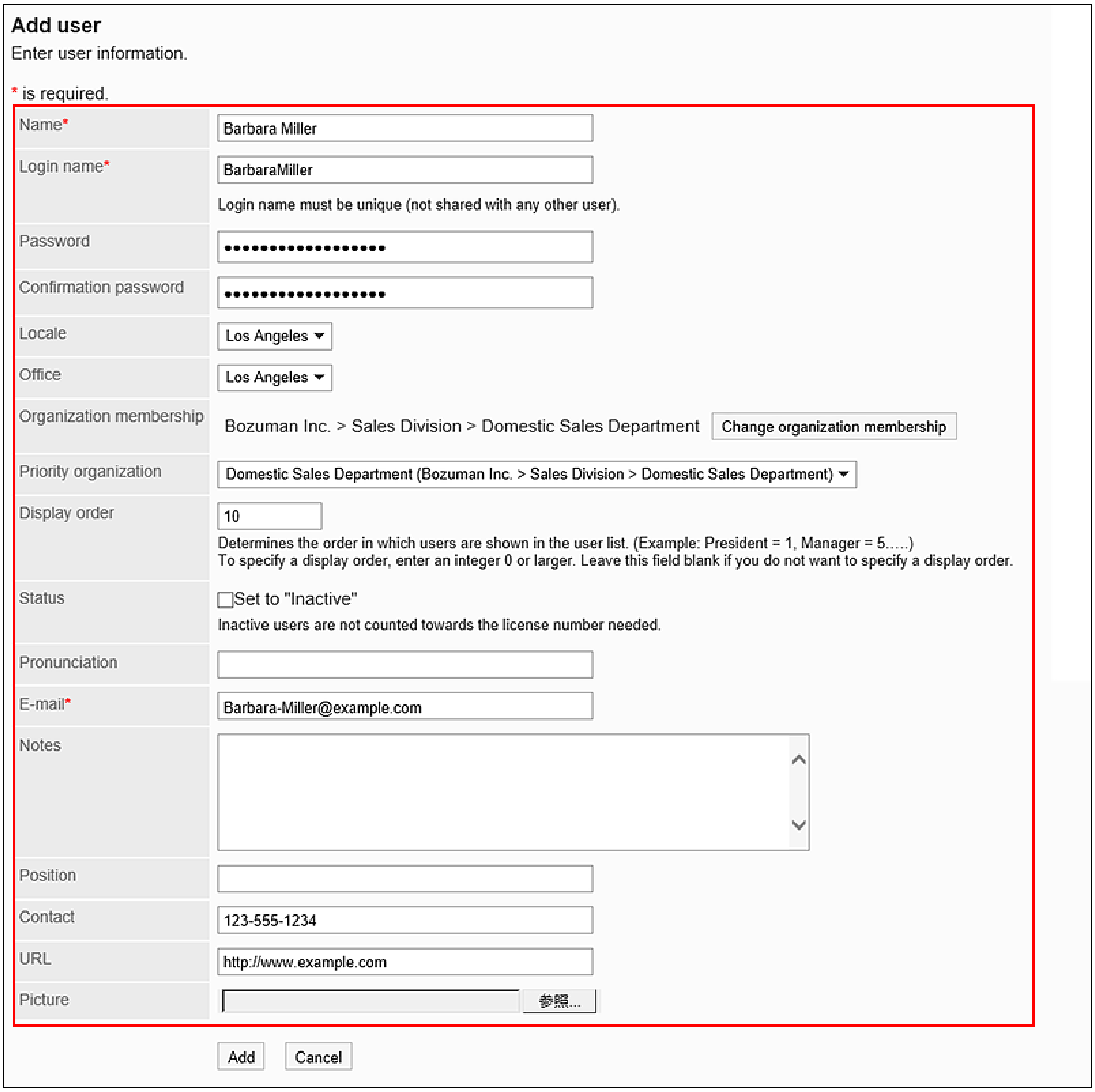
- User with the same login name cannot be added until the user data deletion for that login name is completed. For information on how to set the deletion time, see the "Setting the Deletion Time of User Data(88Page)" section.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization, and then click "Add Users".**



7. **On the "Add Users" screen, set the required items.**



User Profile Setting Items

User profile items vary depending on the system administrator's settings.

For details, see the "Managing User Profile Items(91Page)" section.

The default user profile items are as follows.

Item	Description
Name	Enter the name of the user. • Standard: You must set the standard name and language. The following languages can be set: ◦ 日本語 ◦ English

Item	Description
	◦ Simplified Chinese ◦ Traditional Chinese Displayed in Traditional Chinese. • English spelling: This item is displayed if you have specified English as a language to be used for entering user profile items(565Page) in the General settings screen for localization. Set an English name as necessary. If you do not set this English name, default name is displayed. This English name is displayed when the language used for default name is different from the language that is set for displaying user name in the personal settings. For details, see the "English Spelling(72Page)" section.
Login name	Enter a login name. You cannot use any login name that has been added already.
password Confirm Password	Enter a password for the user. If you want to limit characters that can be used for passwords, see the "Limitations on Passwords(102Page)" section. In the "Confirm Password" field, enter the same password as the one entered in the "Password" field.
Locale	Select a locale that corresponds to the country or region where the user works. For details on locales, see the "Locale Settings(566Page)" section.
Office	Select the office where the user works. For details, see the "Office Settings(288Page)" section.
Organization membership	You can change organizations where users belong to(78Page) by clicking "Change organization".
Priority organization	If an user belongs to multiple organizations, select the organization to display preferentially. For details, see the "What is a Priority Organization?(73Page)" section.
Display order	Set the display order of users who are displayed on the user list screen. Enter an integer greater than or equal to zero.

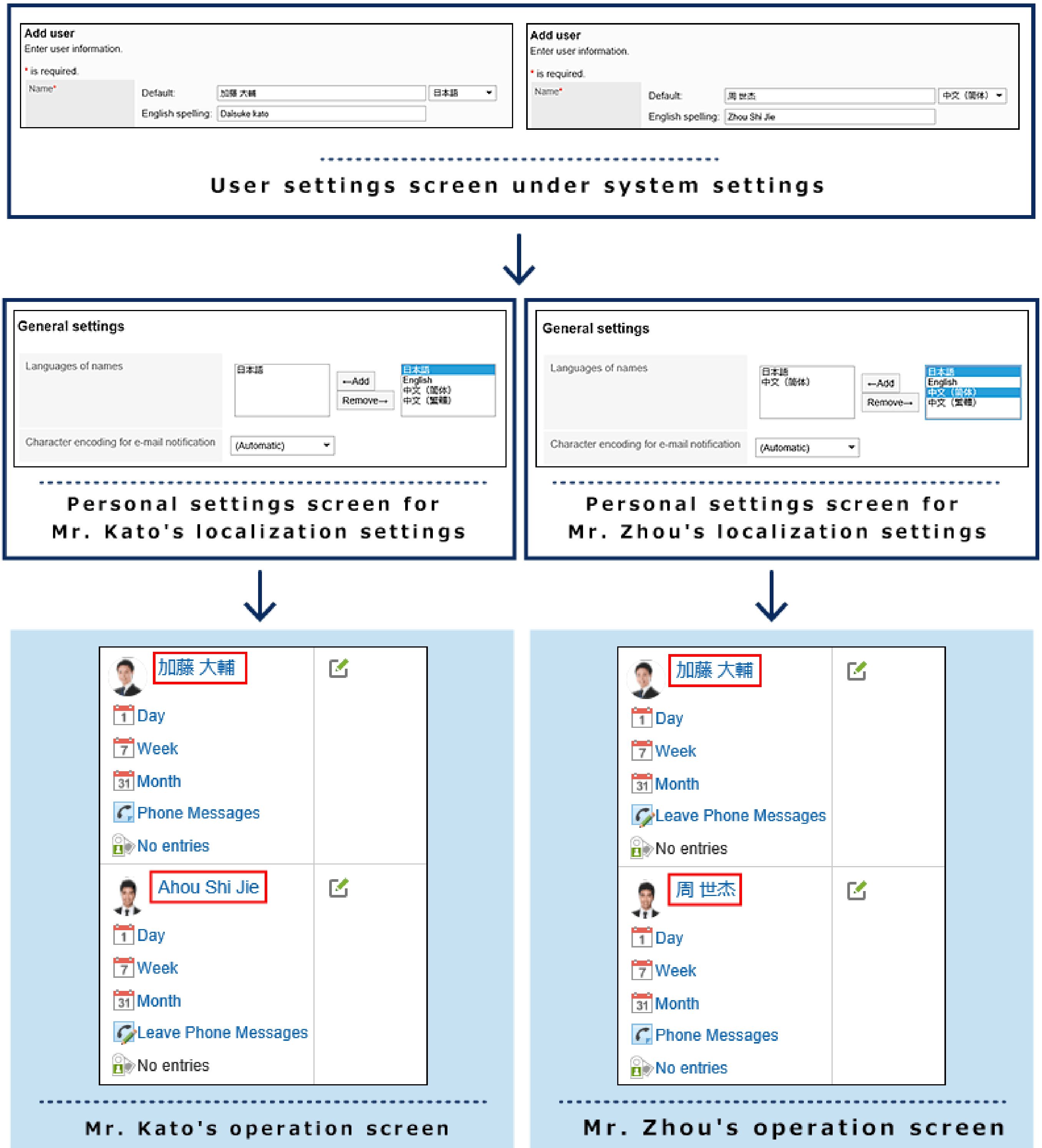
Item	Description
	Users are displayed in ascending order. For details, see the "What is the Display Order?(74Page)" section.
Status	To deactivate an user account, select the "Deactivate" check box. For details, see the "Deactivating Users(82Page)" section.
Pronunciation	Enter the pronunciation of the user name.
E-mail	Enter the e-mail address that is used by the user.
Memo	Enter a memo about the user.
Job title	Enter the job title of the user.
Contacts	Enter the user's contact details, such as an extension number and a mobile phone number.
URL	Enter the URL of the WEB site related to the user.
Picture	Set the profile picture of the user. The specified profile picture can be used as an icon for the user. To display pictures, you need to allow to show profile pictures(250Page).

8. Confirm your settings and click "Add".

English Spelling for Names

If the language used for the standard user name is different from the language specified as the one used to display user name in the personal settings, the name set in the English spelling field is displayed.
If you leave the English spelling empty, the default name is displayed.
The English spelling can also be displayed after the standard user name.
If you want to use the English spelling field, you must specify English as a language to be used for entering user profile items(565Page) in the general settings screen for localization.

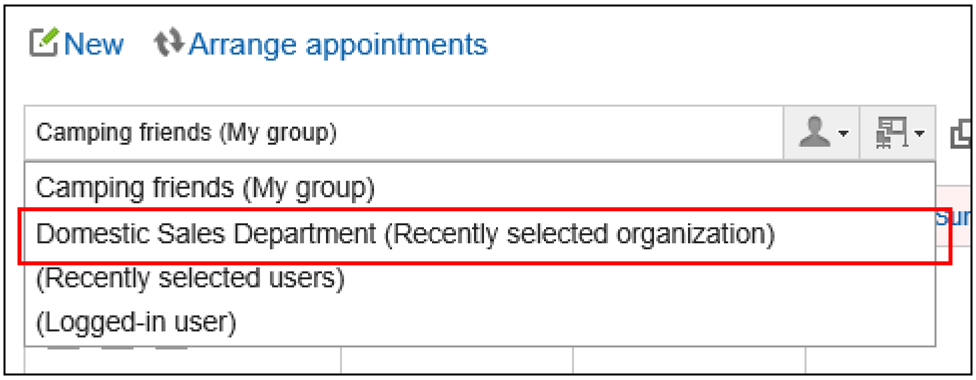
Example of a User Name in English Spelling



What Is Priority Organization?

Priority organization is the organization shown on the top of the drop-down list when users select organizations in Garoon.

After the organization name of a priority organization, "(Priority organization)" is displayed.



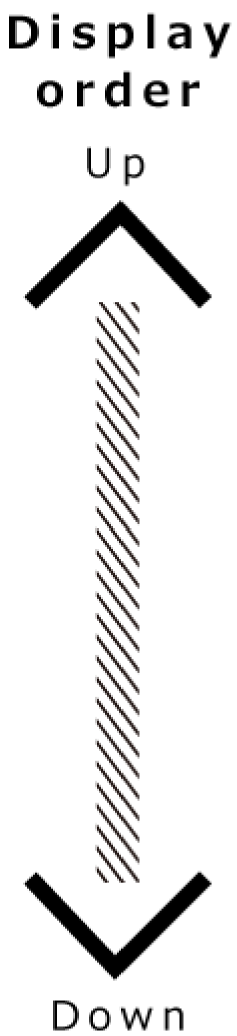
If you set the priority organizations for the ones users frequently select, they can easily select recipients or attendees.

Note

- In the following cases, the organization that is listed at the top level of the "organizations" section of the user profile becomes the priority organization.
    - The organization that was set as the priority organization has been deleted.
    - The user has been removed from the organization which is set as the priority organization.

What Is the Display Order?

On the user list screen, users are displayed according to the display order settings.



- With display priority
  - Users with display priority are displayed above users who do not have the "priority" setting.
  - The display order is 0, 1, 2, and 3... and items with smaller number comes on the top.
    "0" comes on the top.
  - If the same number is specified in priority, the users registered to Garoon earlier are displayed first.
- Without display priority
  - Users with display priority are displayed above users who do not have the "priority" setting.
  - If you do not set priority, users are displayed in the order of the registration to Garoon.

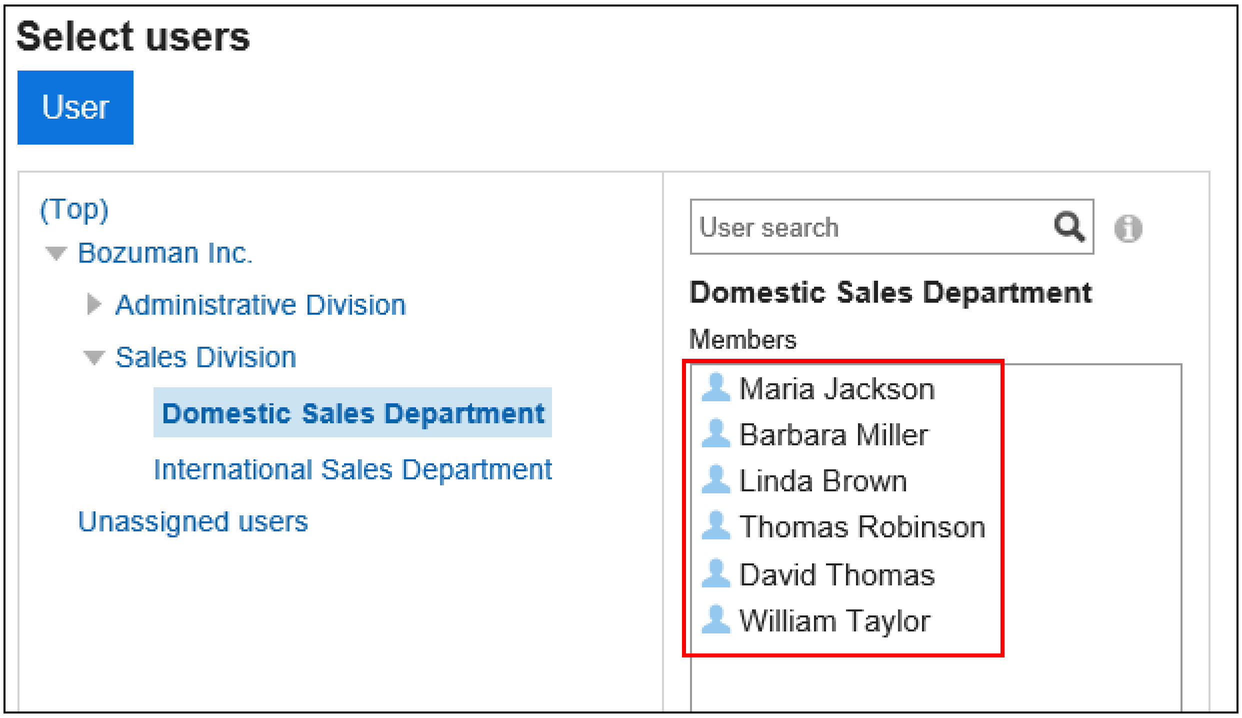
Example of the organization/user settings screen:

Members(1-6 of 6)

First row | <<Previous 20 | Next 20 >>

✔	User name	Login name	Display order	Status	User profile
☐	Maria Jackson	MariaJackson	0	Active	Edit Delete
☐	Barbara Miller	BarbaraMiller	1	Active	Edit Delete
☐	Linda Brown	LindaBrown	2	Active	Edit Delete
☐	Thomas Robinson	ThomasRobinson	11	Active	Edit Delete
☐	David Thomas	DavidThomas	21	Active	Edit Delete
☐	William Taylor	WilliamTaylor	None	Active	Edit Delete

Example of a user screen:



Note

- You set the display priority for the entire users. The display priority cannot be set for each organization.
- If users are added using a CSV file without setting the priority, users will be displayed in the order in which they are listed in the CSV file.

1.3.2.2. Editing User Profile

You can change the user profile.

Note

- By using a CSV file, you can change the user profile and the membership information.
  For details, see the "Managing Organizations, Users, and Roles in a CSV File(161Page)" section.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

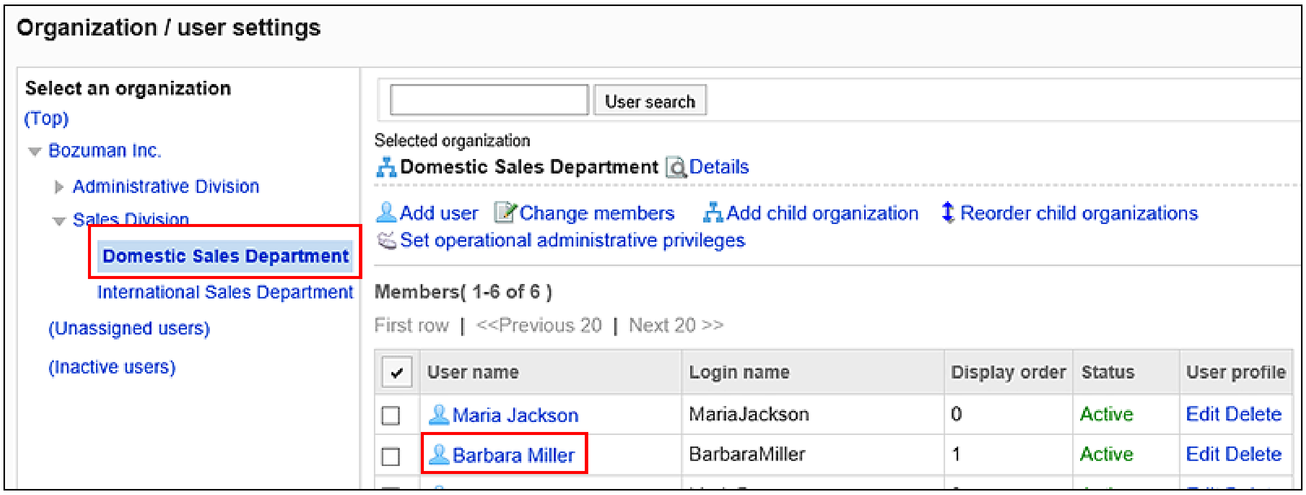
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

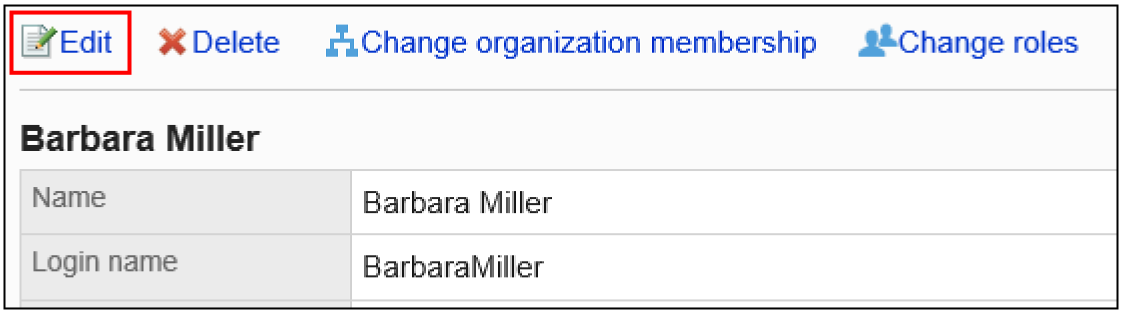
4. **Click Users.**

5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select an organization, and then click the user name of the user whose profile you want to change.**



7. **On the user details screen, click "Edit".**



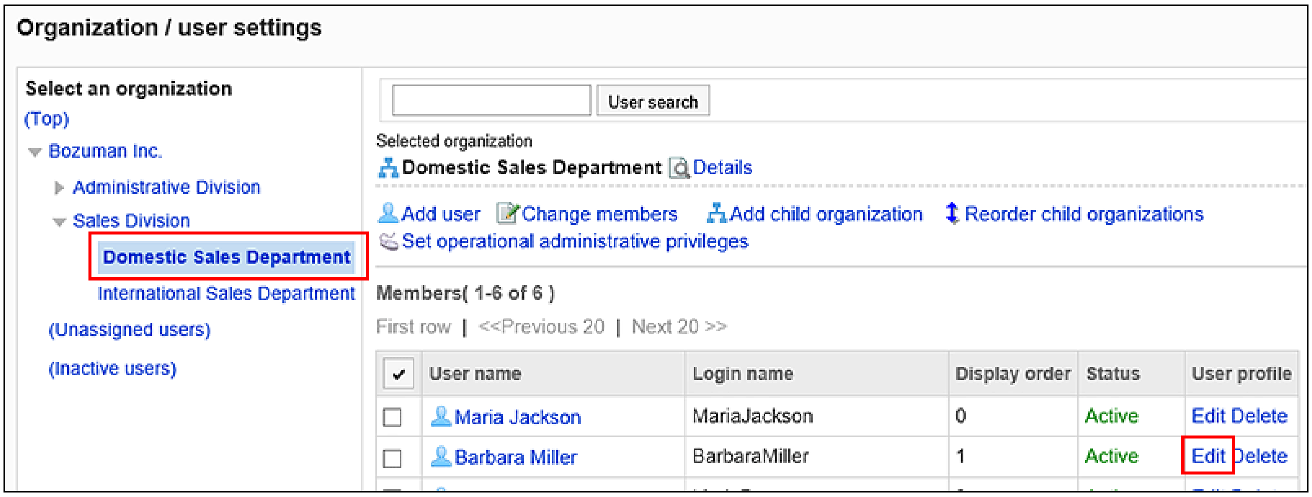
8. **On the screen to edit user profiles, change the user profile.**

   For details, see user setting items(70Page).

9. **Confirm your settings and click "Save".**

Note

- On the organization/user setting screen, you can also change the user profile by selecting an organization and clicking "Change" for the user profile of which membership you want to change.

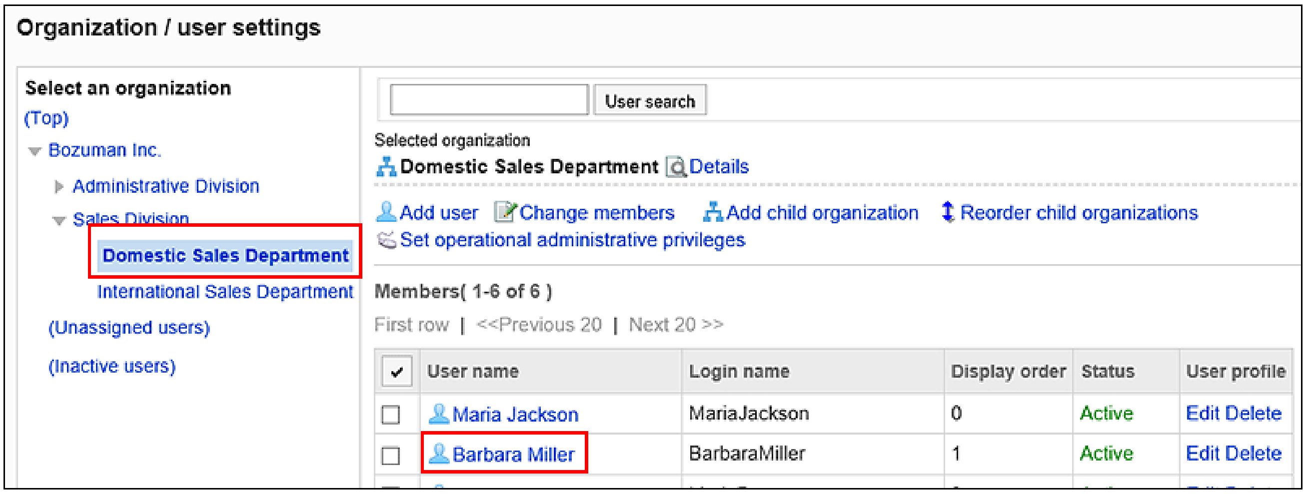


Changing Organization to Which Users Belong

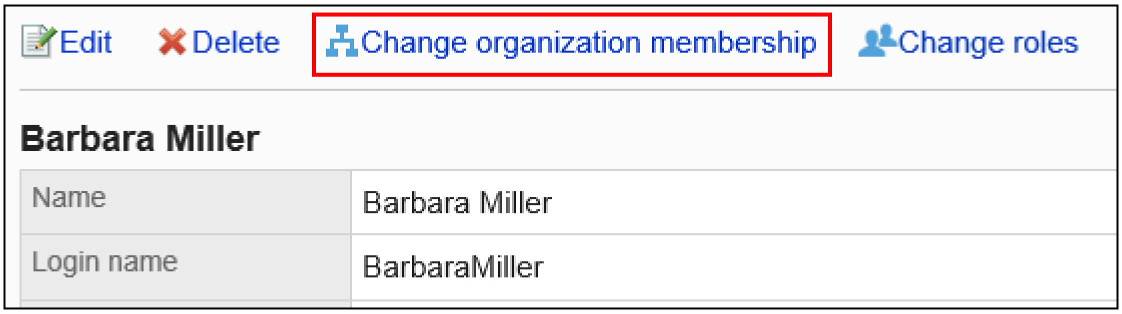
You can change the organizations users belong to. Users can belong to multiple organizations.
If a user belongs to more than one organization, you also set the priority organization.
For details on the priority organization, see the "What is a Priority Organization?(73Page)" section.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization, and then click the user name of the user whose organization you want to change.**

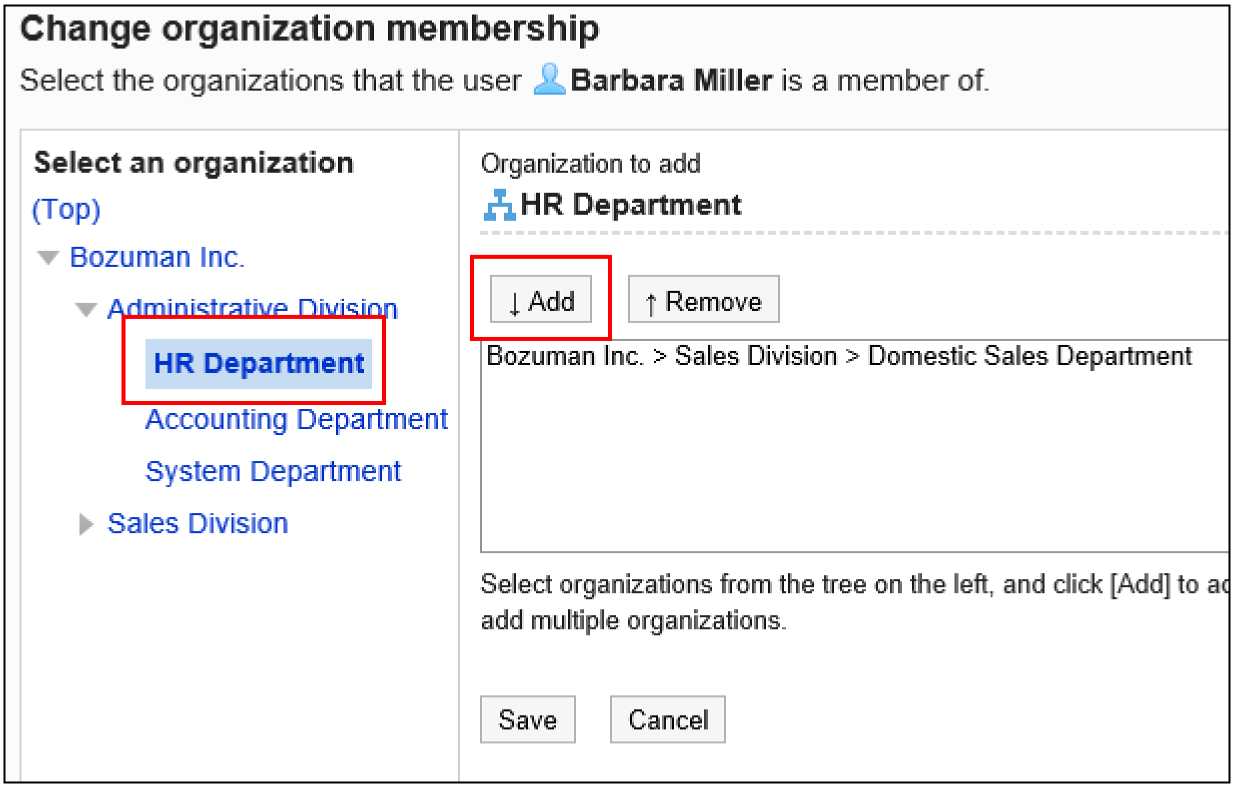


7. **On the user details screen, click to change organization membership.**



8. **On the screen to change organization membership, select an organization, and then click to add the organization.**

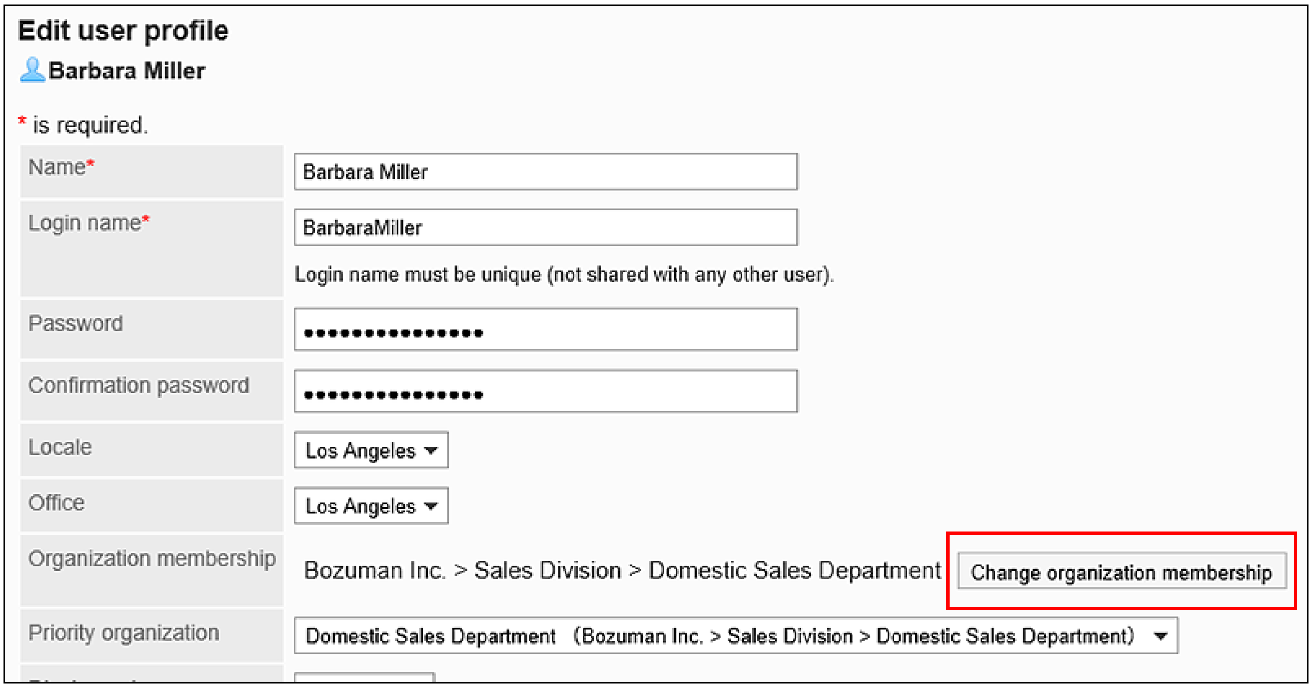
If you want to remove an organization, select the organization you want to remove, and click to remove it.



9. Click Save.

Note

- On the screen to change user profile, you can also change organizations where users belong to by clicking "Change membership organization" in the "Membership organization" field.



1.3.2.3. Changing User Roles

You can set up roles for each user.

For details on roles, see the "What Is a Role?(115Page)" section.

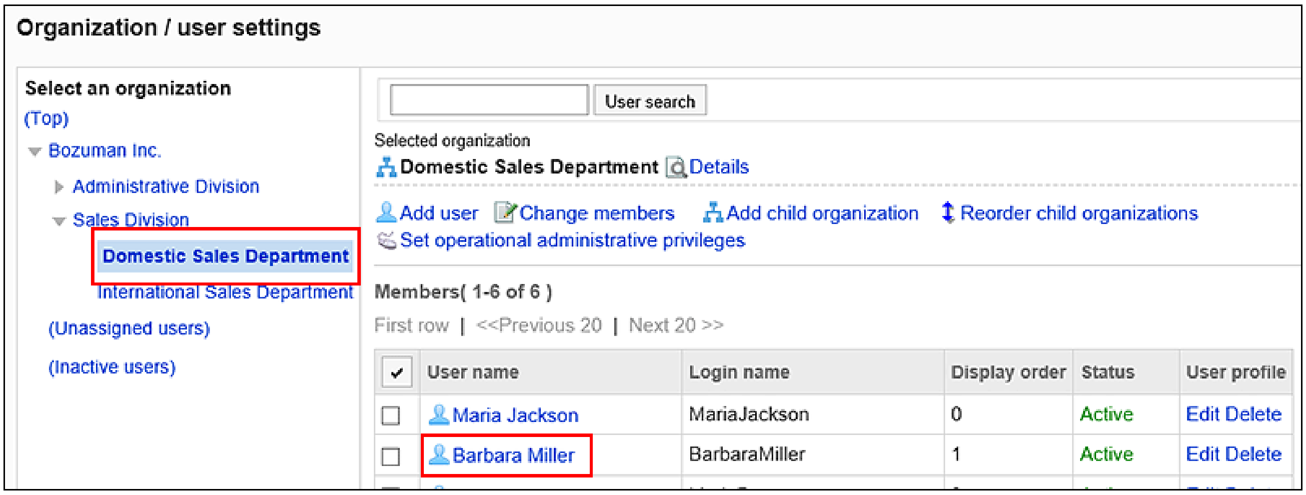
Note

- If you want to add multiple users to one role, you can add them in the role setting screen.
  For details, see the "Assigning Roles to Users(120Page)" section.

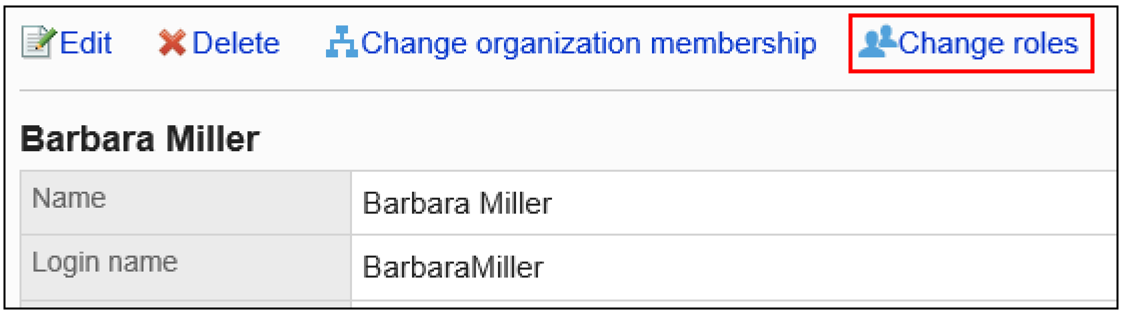
- When you use CSV files, you can change the roles of users in bulk.
  For details, see the "Managing Organizations, Users, and Roles in a CSV File(161Page)" section.

Steps:

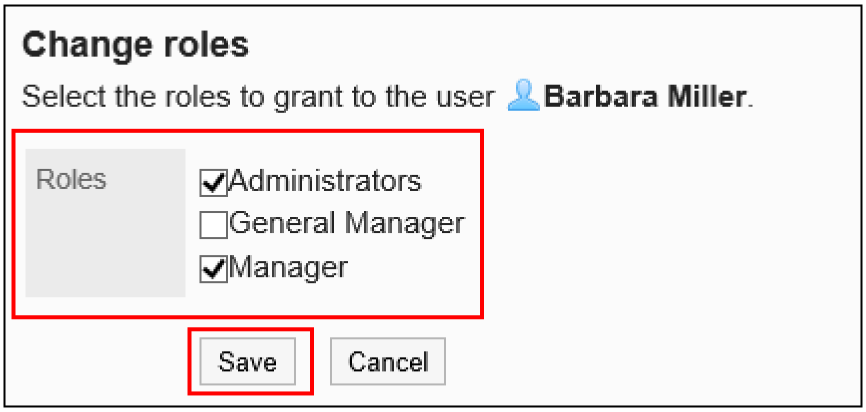
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization, and then click the user name of the user to whom you want to assign a role.**



7. **On the user details screen, click to change roles.**



8. **On the screen to change roles, select the check boxes of the roles you want assign to users, and click "Edit".**



1.3.2.4. Deactivating Users

If you want to prohibit access to Garoon, you can deactivate the users without deleting their information.
Users who are deactivated cannot log in to Garoon.
To prevent unauthorized access, we recommend that you deactivate users who will not log in to Garoon for a long period for taking a leave or leaving for other company.

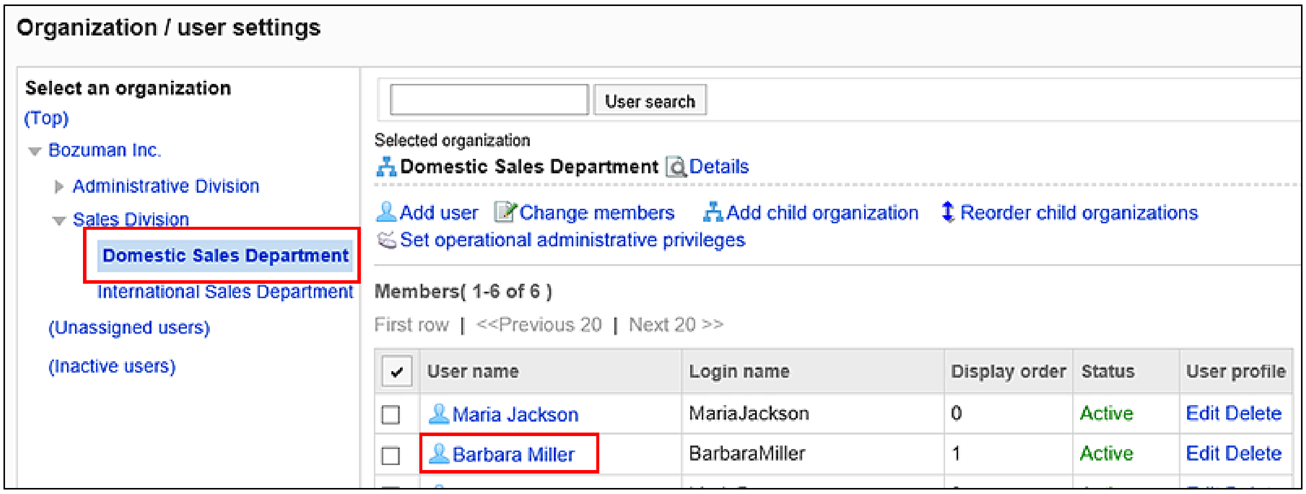
Note

- Deactivated users will be exempted from the license count.

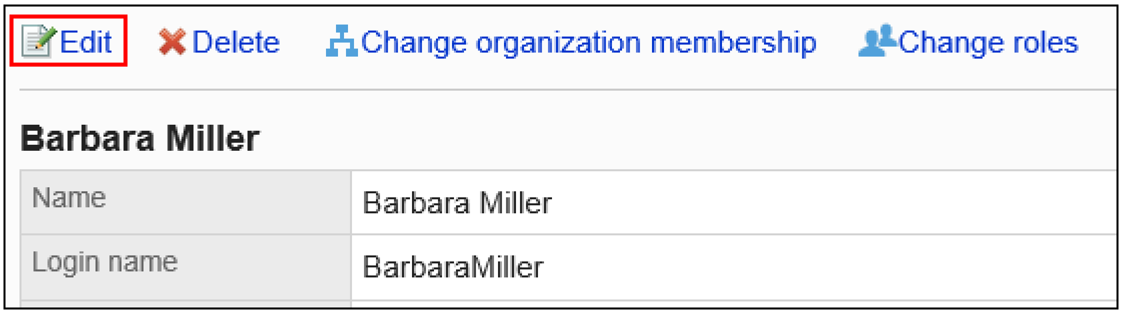
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select an organization, and then click the user name of the user you want to deactivate.**

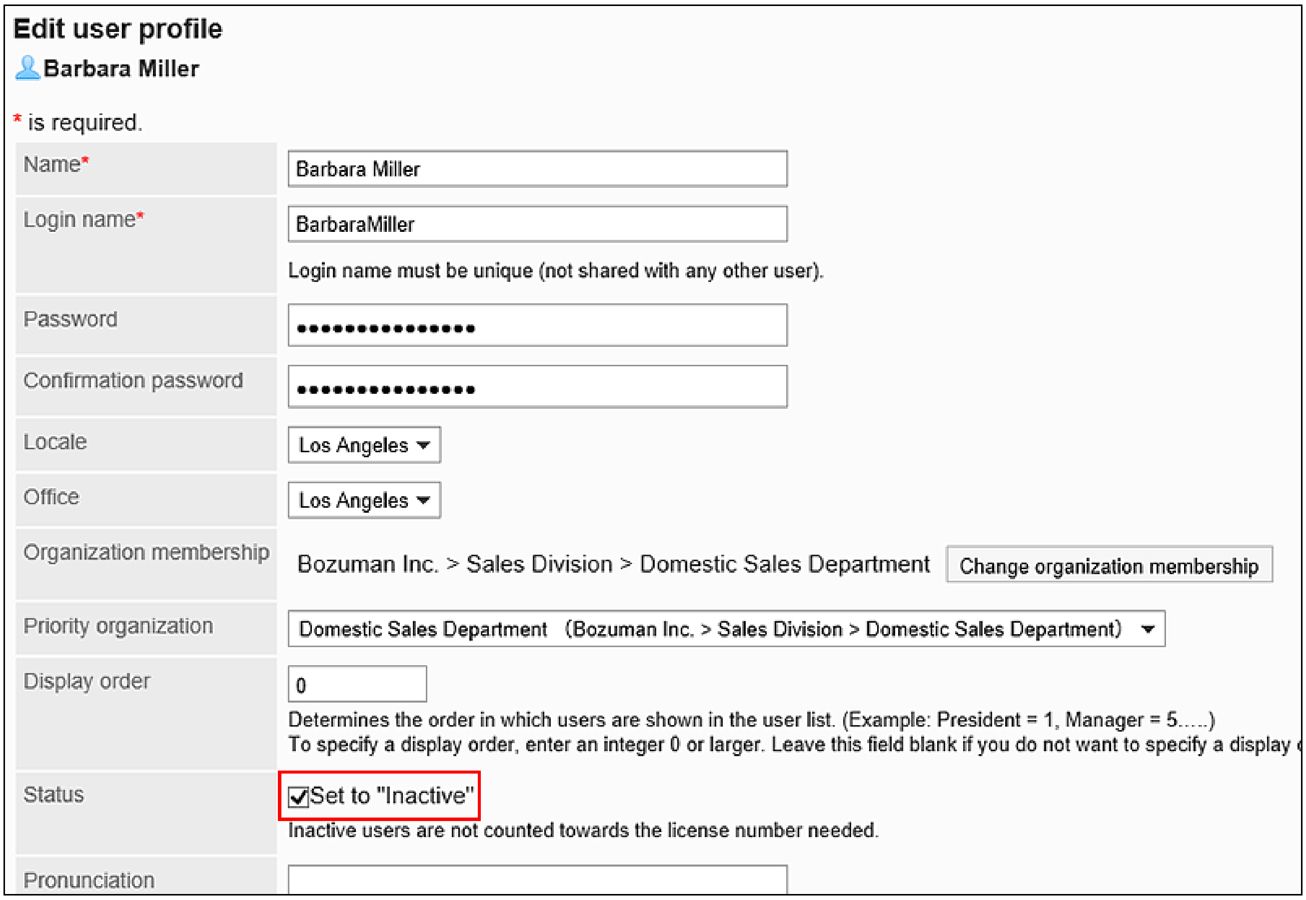


7. **On the user details screen, click "Edit".**



8. **On the screen to change user profile, select the "Deactivate" checkbox in the status field.**

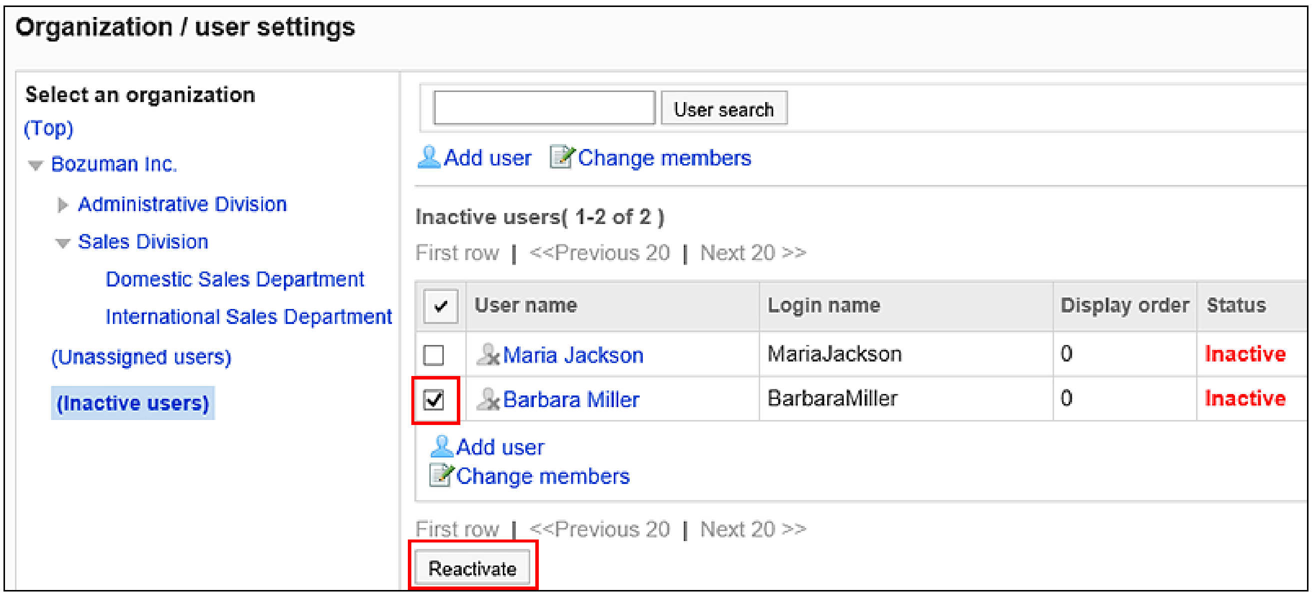
If you deselect the "Deactivate" check box, that user will be able to use Garoon again.



9. Confirm your settings and click "Save".

Note

- Clicking "(Inactive Users)" on the organization/user setting screen displays a list of users who are inactive. To allow them to use Garoon again, select the check boxes for the target users, and then click to reactivate them.



1.3.2.5. Deleting Users

You can delete users.

Deleted users' personal data and user profile will be deleted from the server by the scheduling service.

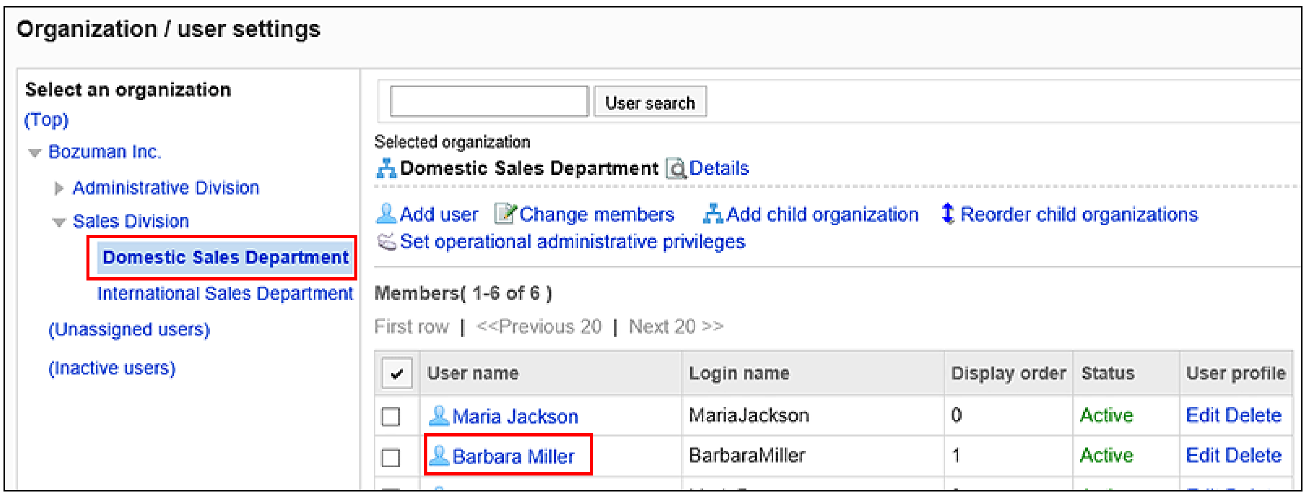
User with the same login name cannot be added until the user data deletion for that login name is completed.

By deleting users, the number of required licenses decreases. Before deleting the user data, the number of required licenses is applied to the Garoon system.

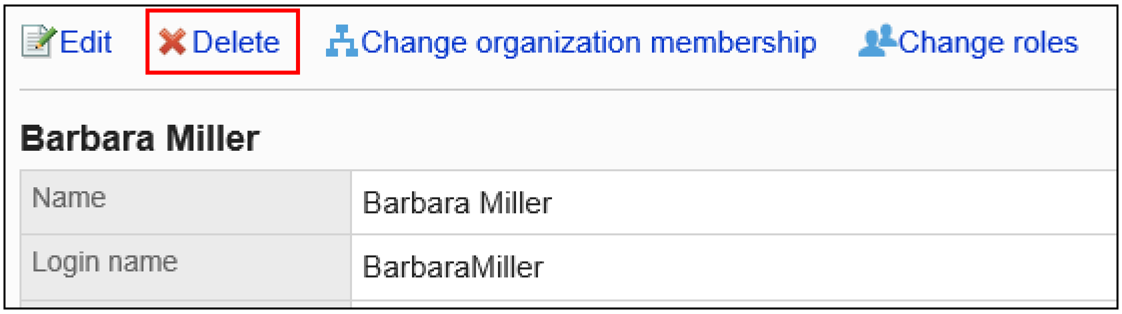
Adding a user with the same login name does not associate the data before deletion.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization, and then click the user name of the user you want to delete.**



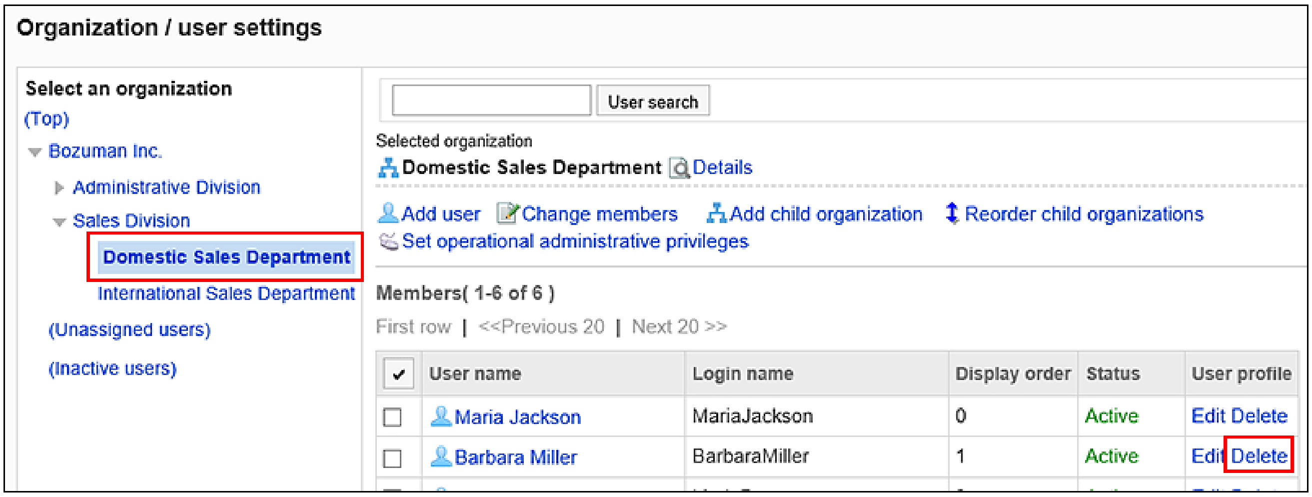
7. **On the user details screen, click "Delete".**



8. **Click "Yes" on the screen to delete users.**

Note

- On the organization/user setting screen, you can also delete a user by selecting an organization and clicking **Delete** for the user profile you want to delete.



- By cancelling the removal of users(90Page), you can restore the deleted users.
  You can cancel the deletion before the scheduling service automatically deletes the user data.

Handling of Deleted User Data

Data related to deleted users and data created by the users are handled as follows.

Data to Be Deleted

The following data will be deleted on the deletion time of the user data.

- Data related to users such as e-mails, timesheet, notes, and personal bookmarks

- Data that have not been shared with other users

  Example: Messages sent only to themselves
- Data that has not been published, such as a draft request or a report

Data That Is Not Deleted

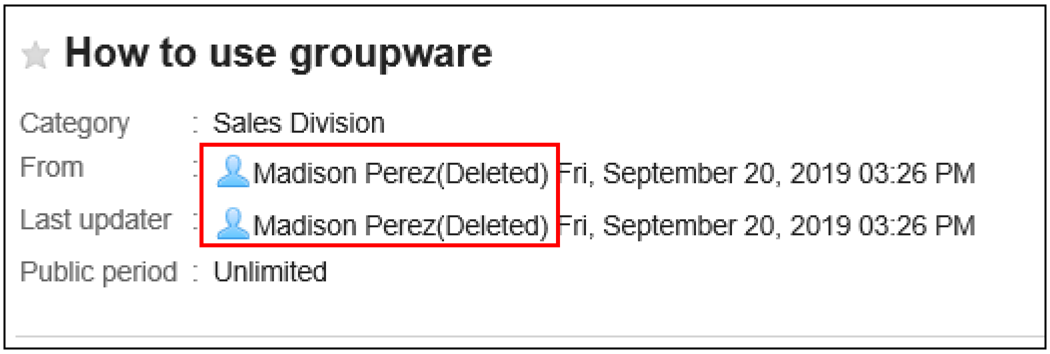
The following user data will not be deleted.

- Data shared with other users

  Example: Messages addressed to active Garoon users, submitted workflow, and so on
- Public appointments or appointments in which "Shared with" users are specified
- Topics ready to publish or public topics
- Addresses added to shared address books
- Uploaded files

The "(Deleted user)" is displayed after the deleted user's name in the "From" field and "Updated By" field.

The name of the deleted user that is displayed is the default user name.



Caution

- A request submitted by a proxy applicant of a user can be edited or deleted by the proxy applicant even after the user has been deleted.

User Data That Can Be Viewed until Deleted

The following data created by deleted users can be viewed in the system administration screen until they will be deleted completely.

- Messages that have been sent to themselves by the deleted users
- Messages that all the recipients have been deleted
- Files attached to messages

Note

- If you want to delete all the data of the deleted user immediately, refer to how to delete users immediately.

Setting the Deletion Time of User Data

You can set the time to automatically delete user data for deleted users.
By default, the time period for deleting data is set from 23:00 to 3:00 on the next day (UTC14:00 to UTC18:00).

During the deletion process of user data, the load on Garoon can be high, which may interfere with the business.
Additionally, if other tasks are running, the process may not work.
We recommend that you set the time period for deleting user data to avoid the following time.

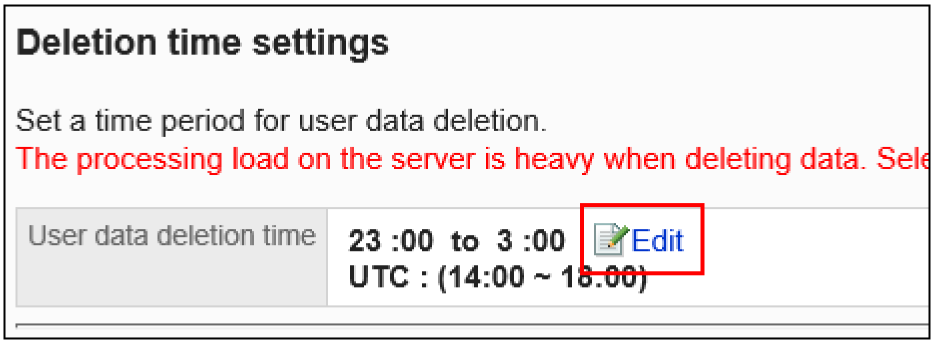
- When a user uses Garoon
- Time periods when backing up of Garoon data will be performed
- Time periods when tasks of the scheduling service to delete data will be performed
  For details on the time period, see cleanup.csp(1659Page).

Caution

- You cannot set the duration longer than 24 hours for the user data deletion period.
- If you want to delete a large amount of data, the process may be completed after the specified time period.

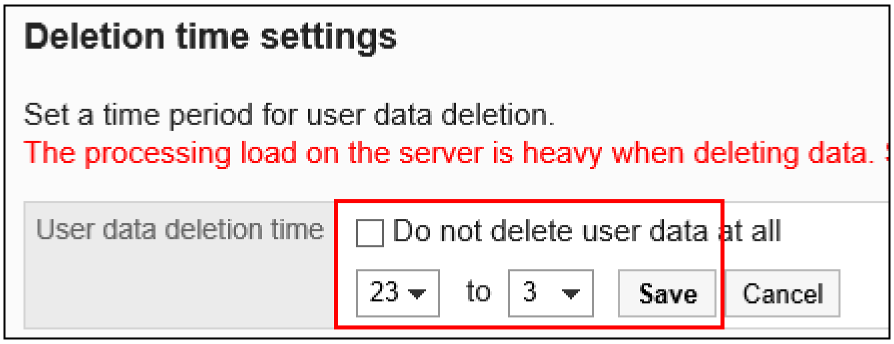
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click the item to set the user data deletion time.**
6. **Click "Change" on the screen for setting up the user data deletion time.**



7. Set the time period in which you want to delete the user data, and then click "Save".

When you select the Do Not Delete check box, the deletion time setting is disabled. No user data will be deleted.



Deleting Users Immediately

You can select users and delete them and their user data immediately.

Caution

- The deleted users and user data cannot be restored.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

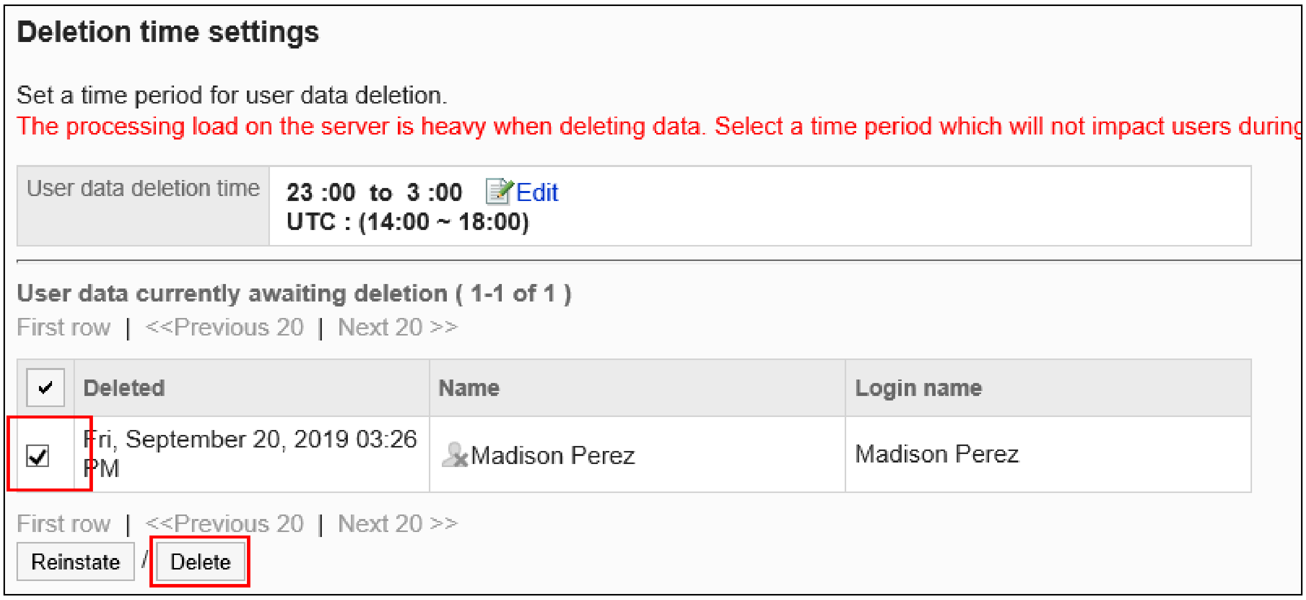
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click Users.

5. **Click the item to set the user data deletion time.**

6. **On the screen to set the user data deletion time, select the check boxes of users you want to delete, and then click "Delete".**



7. **Click "Yes" on the Delete All Users screen.**

Cancelling the Removal of Users

Recover users and user data before they are permanently deleted.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

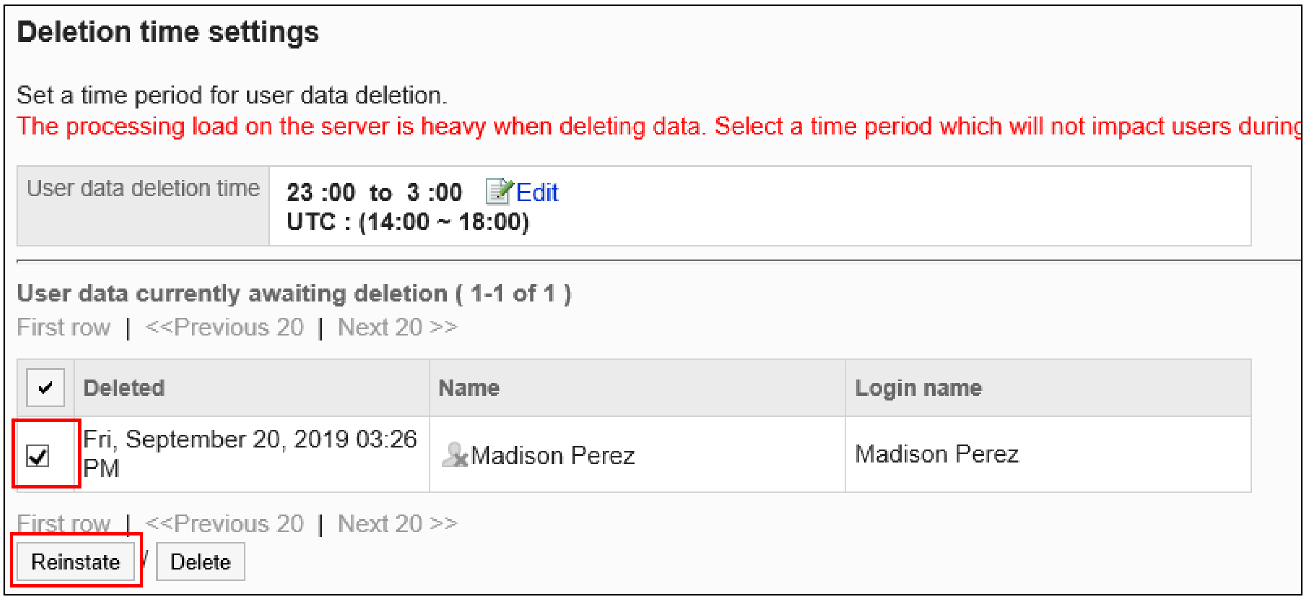
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

5. **Click the item to set the user data deletion time.**

6. **On the screen to set the user data deletion time, select the check boxes of users you want to cancel deletion, and click "Recover".**



7. Click "Yes" on the screen to recover users in bulk.

1.3.2.6. Managing User Profile Items

This section describes how to set user profile items.

There are two types of items for entering user profile.

- Built-in items:

  These items are set by default. You can configure whether to use these items, and whether these items are displayed in user pfofile.

  The built-in items are as follows.

  - Name
  - Login name
  - Locale
  - Office
  - Organization
  - Priority organization
  - Presence information
  - Pronunciation
  - E-mail
  - Memo
  - Job title
  - Contacts

- URL
- Picture

- Custom Items:

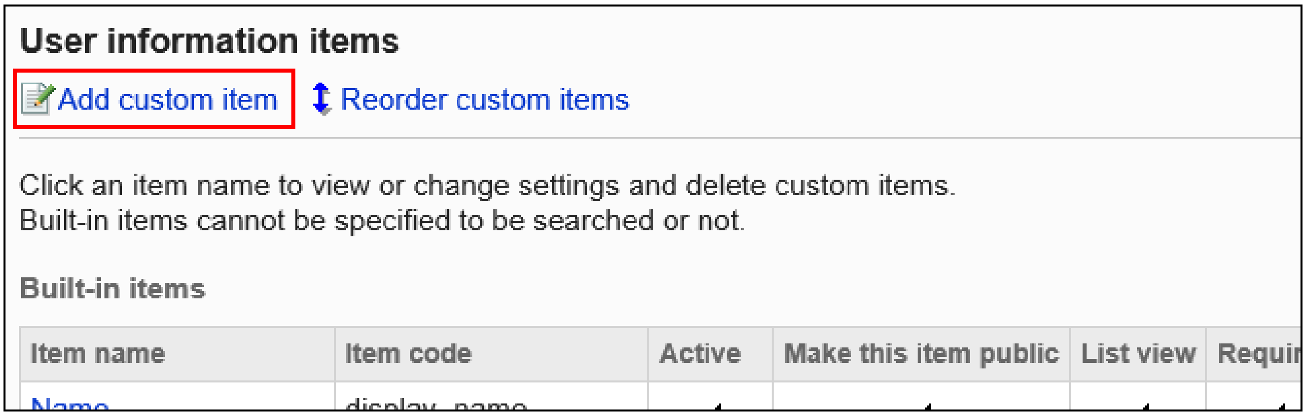
  These items are added by your system administrator if necessary.

Adding User Profile Items

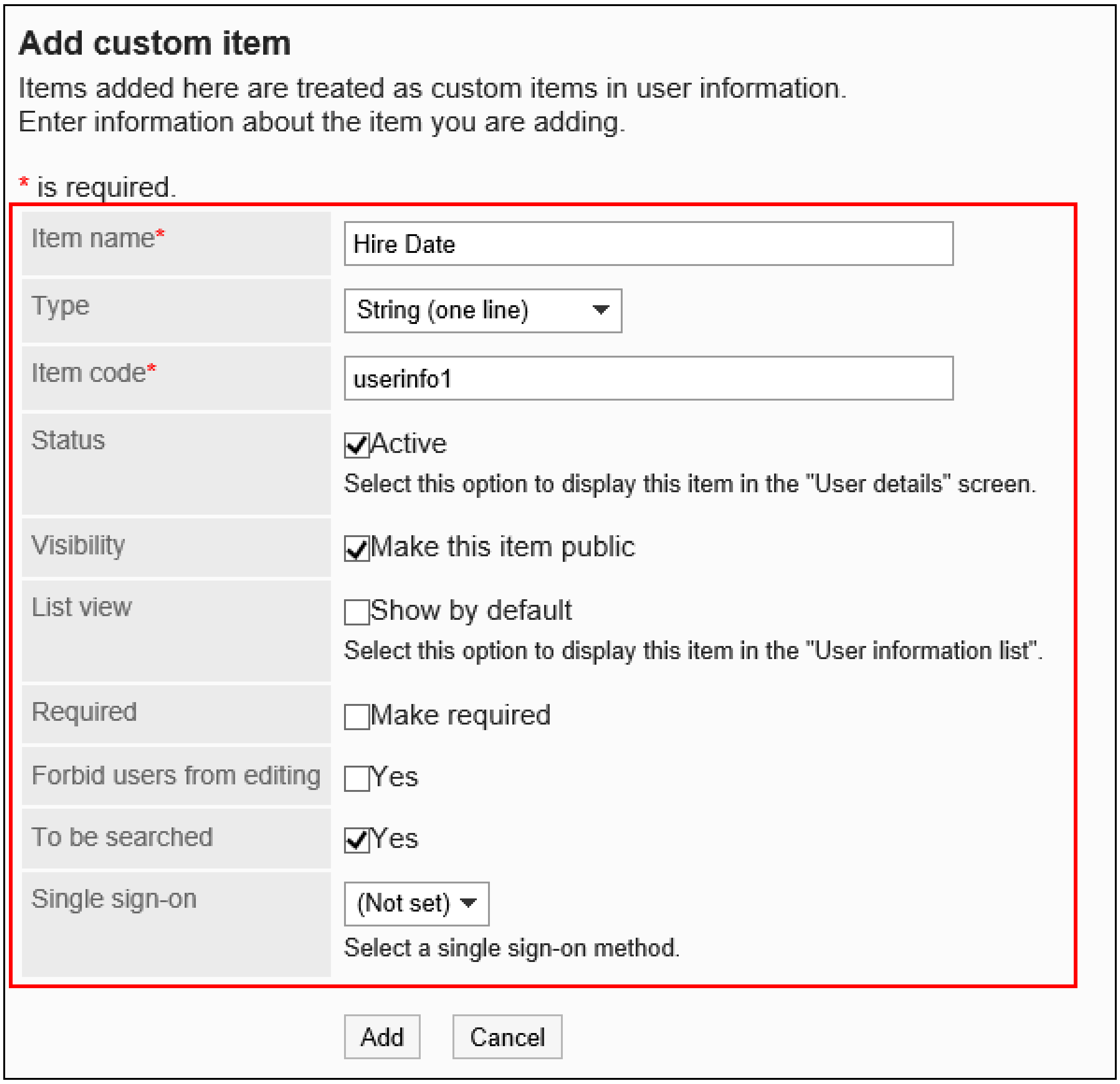
You can add custom items to user profile.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "User Profile Items".**
6. **On the user profile items screen, click "Add Custom Items".**



7. **On the screen to add custom items, set the required items.**



User Profile Setting Items

Set the following items:

Item	Description
Item name	Enter the display name of the item. • You cannot change item names of built-in items.
Type	Select an item type. • When you set a custom item, you can select from the following item types. ◦ **String (one line)**: If you specify this item type, you cannot insert line feeds. ◦ **String (multiple lines)**: If you specify this item type, you can insert line feeds. ◦ **URL**: This item type is for entering an URL of a Web site.

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td></td><td>
Image URL:
This item type is for entering an URL where you want to save the image file.
E-mail:
This item type is for entering an e-mail address. By specifying this item type, you can work with e-mail software.
File:
This item type is for attaching files to user profile.
IP phone:
This item type is for entering IP phone numbers. By setting this item type, you can work with IP phone function.
Password:
This item type is for entering a password for product or system other than Garoon. On the screen, "●●●" is displayed instead of the string entered.
</td></tr>
<tr><td>Item code</td><td>This is a unique code for identifying an item.
You cannot change item codes for built-in items.
For item codes of custom items, you can use single-byte alphanumeric characters or single-byte underscores ("_").
</td></tr>
<tr><td>Use</td><td>Select whether to use items in the user profile screen and in the user list.
For the following built-in items, you cannot set whether or not to use them.
Name
Login name
Locale
Office
Organization
Priority organization
Presence information

For the built-in item of "Picture", you can perform the following actions even if you deselect the "Active" check box.
Download the configured picture from its URL
Display the picture of user's profile
For details, refer to Allowing to Show Profile Pictures(250Page).

</td></tr>
<tr><td>Public</td><td>Select whether to expose the item to users.
Even if you clear the "Make this item public" check box of the item whose status is active, the item is still displayed in the following screens:
</td></tr>
</table>

Item	Description
	◦ "User details" screen in Basic system administration ◦ "Edit user profile" screen in system administration ◦ "User details" screen in Personal settings ◦ "Edit user profile" screen in Personal settings • For the following built-in items, you cannot set whether or not to expose them. ◦ Name ◦ Presence information • For the "Picture" built-in item, you can perform the following actions even if you deselect the "Make this item public" check box. ◦ Download the configured picture from its URL ◦ Display the picture of user's profile For details, refer to Allowing to Show Profile Pictures(250Page). • If you select "Password" for the item type of a custom item, you cannot specify this.
List view	Select whether to display items in the address list of the user list. • For the following built-in items, you cannot set whether or not to display them in the list. ◦ Name ◦ Presence information • If you select "Password" for the item type of a custom item, you cannot specify this.
Required Item	Select whether to make the item mandatory. • For the following built-in items, you cannot set whether or not to make them mandatory. ◦ Name ◦ Login name ◦ Locale ◦ Office ◦ Organization ◦ Priority organization ◦ Presence information
Users cannot change settings	Select whether to allow users to change settings. • For the following built-in items, you cannot specify this. ◦ Organization ◦ Presence information

Item	Description

Search in	Select whether or not to set the item as a search target.
	• For built-in items, you cannot change the settings.
	• If you have selected the following item types for custom items, you cannot set whether or not to include them as search targets.
	  ◦ Files
	  ◦ password

Single Sign-On	Select this to include user profile items in the login information used to log in with single sign-on to another system. Select from the configured single sign-on.
	• The Single Sign-On cannot be specified for the following built-in items.
	  ◦ Name
	  ◦ URL
	  ◦ Picture
	• If you have selected the following item types for custom items, you cannot set the Single Sign-On.
	  ◦ URL
	  ◦ Image URL
	  ◦ Files
	  ◦ password
	For details, see Single Sign-On Settings(196Page).

-
- Confirm your settings and click "Add".

Changing User Profile Items

You can change user profile items.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

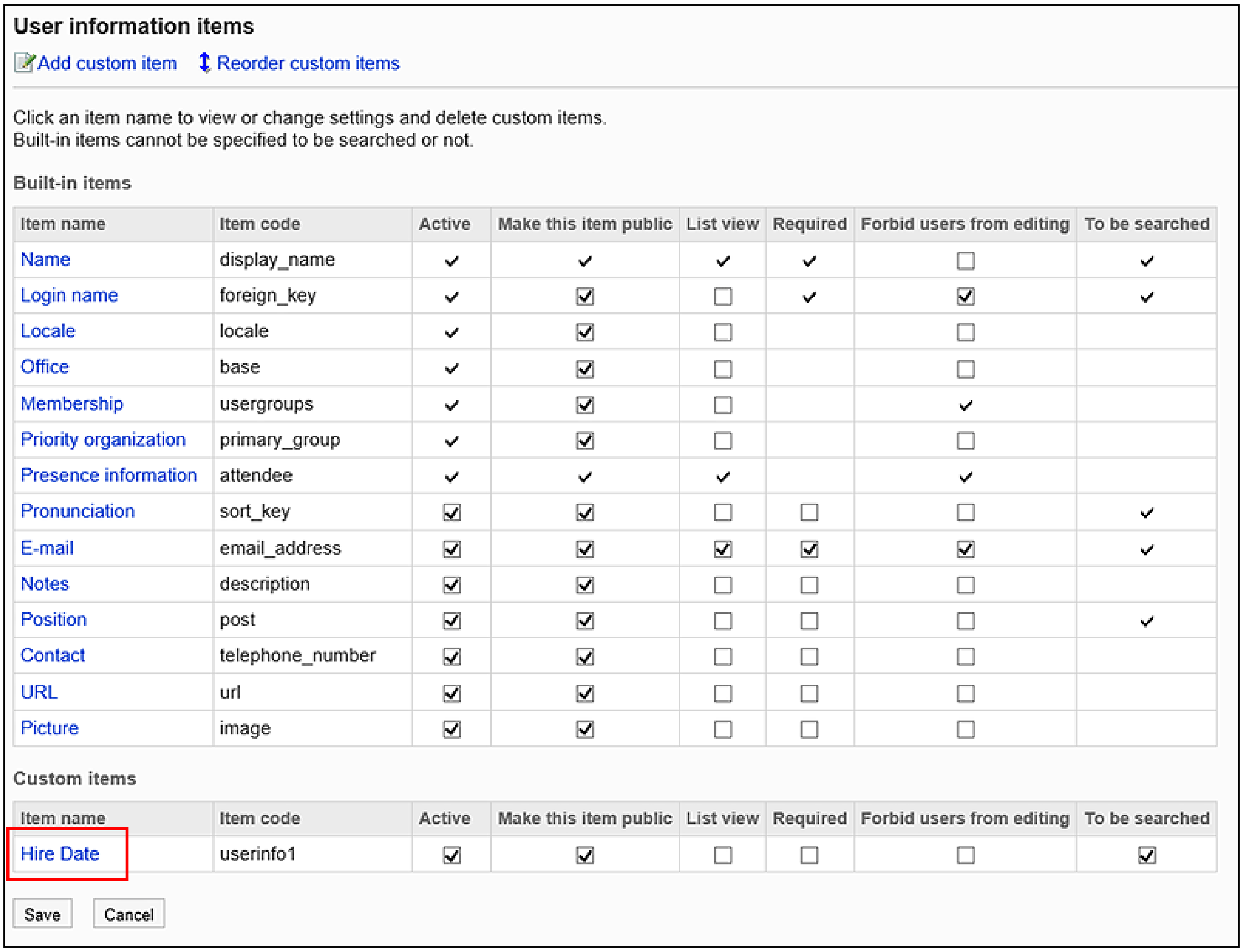
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

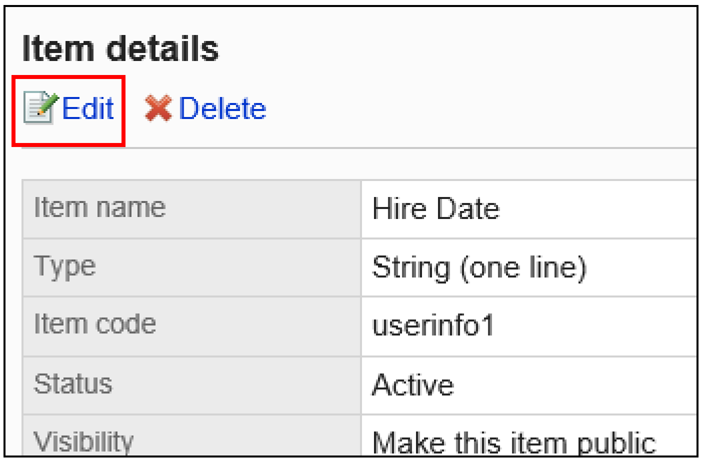
4. **Click Users.**

5. **Click "User Profile Items".**

6. **On the user profile items screen, click the item name of the item you want to change.**



7. **On the item details screen, click "Save".**



8. **On the screen to change items, change items as necessary.**

For details, see the user profile item settings.

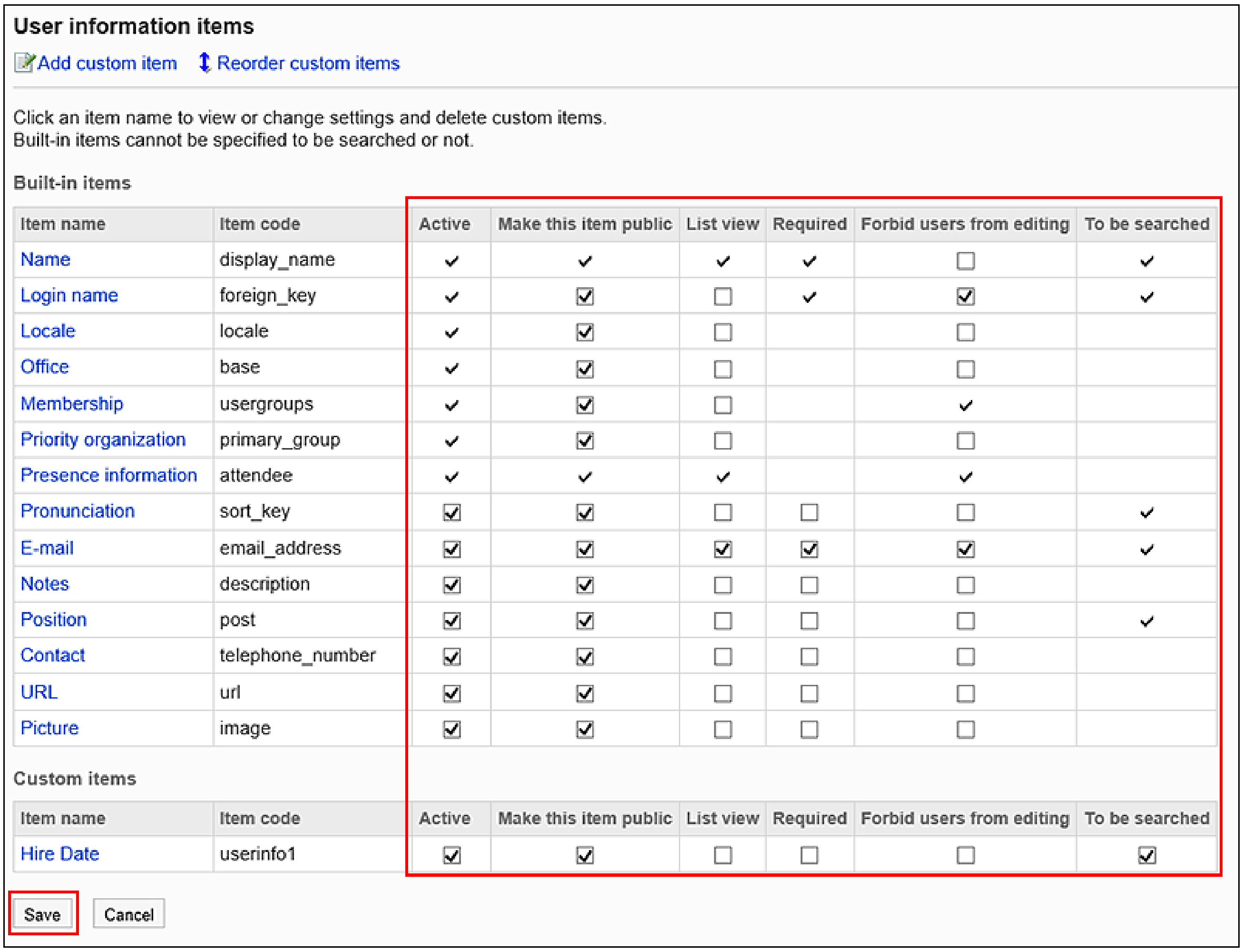
9. **Confirm your settings and click "Save".**

Changing User Profile Items in Bulk

You can change user profile items in bulk.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "User Profile Items".**
6. **On the user profile items screen, select or deselect the check boxes of the items for which you want to change the settings, and then click "Save".**



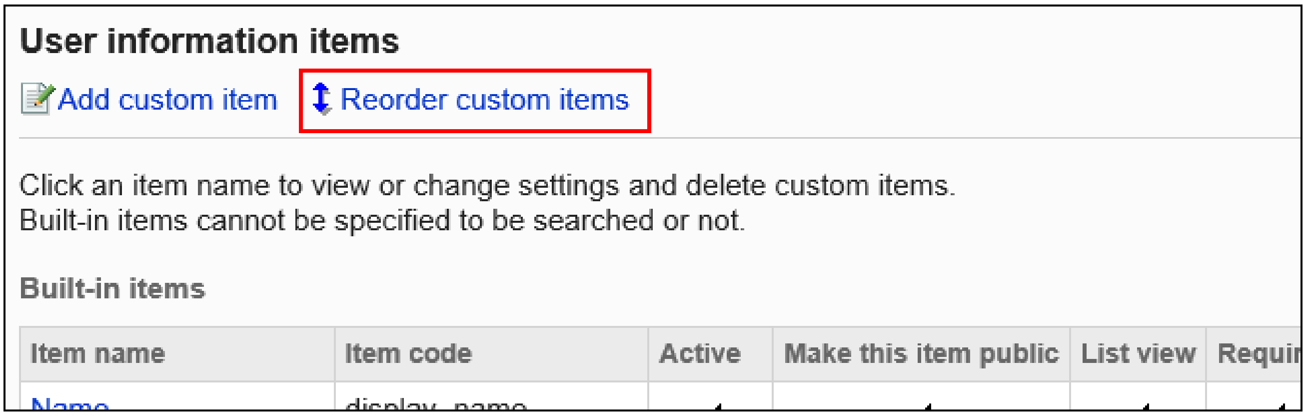
Reordering User Profile Items

You can change the order of custom items in user profile.

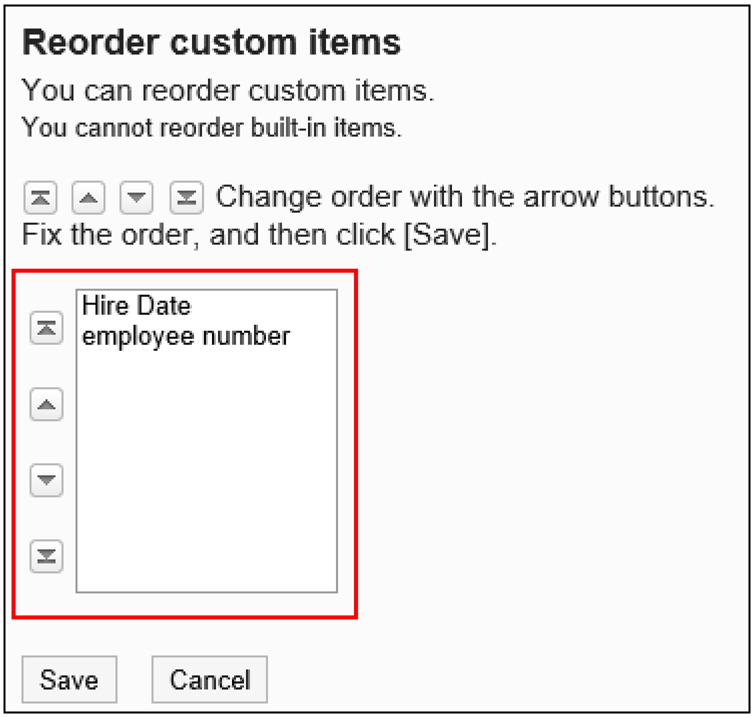
You cannot change the order of built-in items.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "User Profile Items".**
6. **On the user profile items screen, click "Reorder Custom Items".**



7. **On the screen to reorder custom items, reorder the custom items.**



8. **Confirm your settings and click "Save".**

Deleting User Profile Items

You can delete custom items for user profile.

Built-in items cannot be deleted.

Caution

- When a custom item is deleted, the registered contents for that item are also deleted from the user profile.
  Deleted custom items and information cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

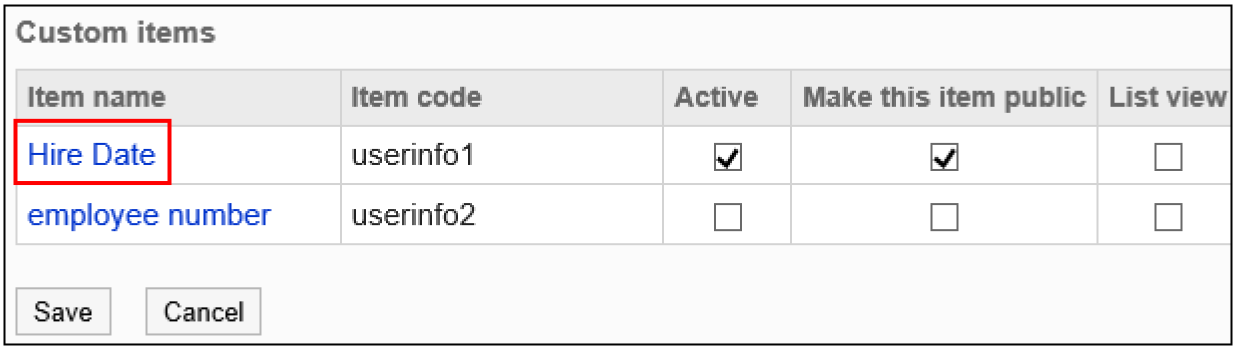
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

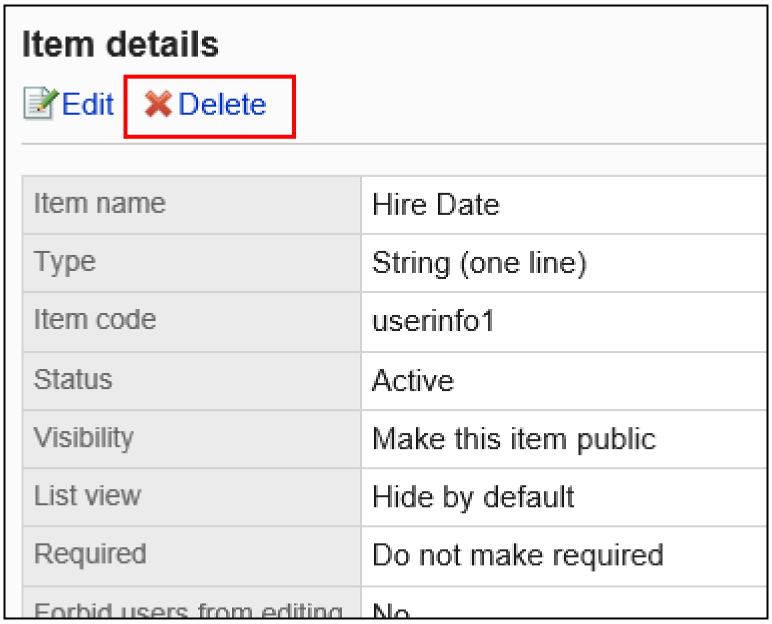
4. **Click Users.**

5. **Click "User Profile Items".**

6. **On the user profile items screen, click the item name of the item you want to delete.**



7. **On the item details screen, click "Delete".**



8. Click "Yes" on the screen to delete items.

1.3.2.7. Limitations on Passwords

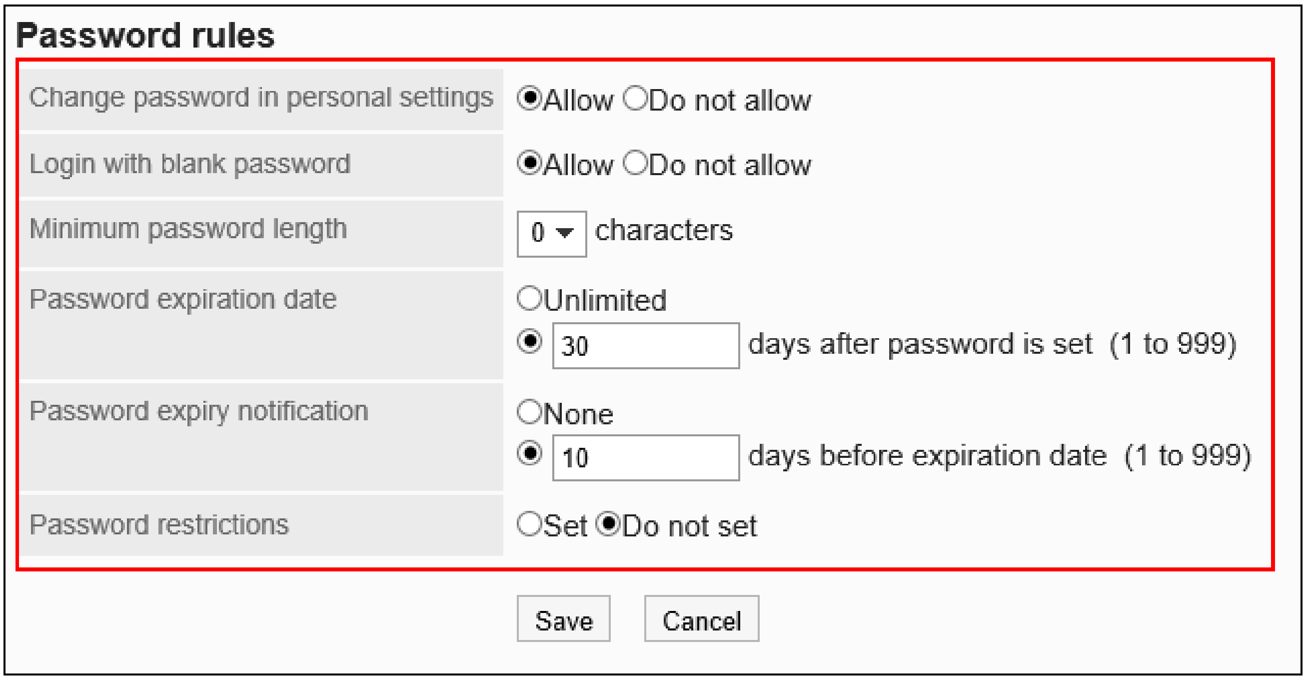
You can set up characters that can be used for passwords and password expiration.
It is recommended to establish a password policy so that users will not choose weak passwords during password configuration.

Note

- When you use LDAP as an authentication database, or when you use environment variable authentication, password expiration date setting is disabled. For details, see the "Authentication System(165Page)" section.
- For details on the password expiration date, see the FAQ article regarding the start date of the password validity period.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "Password Limit".**
6. **On the "Password limit" screen, set the required items.**



Limitations on Passwords

Set the following items:

Item	Description
Changing passwords in personal settings	Specify whether to allow users to change their passwords.
Log in with an empty password	Select whether to allow logins without entering passwords.
Password length	Specify the minimum number of characters for the password. The maximum number is 64.
Password expiration	Set one of the followings. • Unlimited: The same password can be used indefinitely. • 1 to 999 days: Specify the value using an integer. If you specify a validity period, the password must be changed after that period ends.

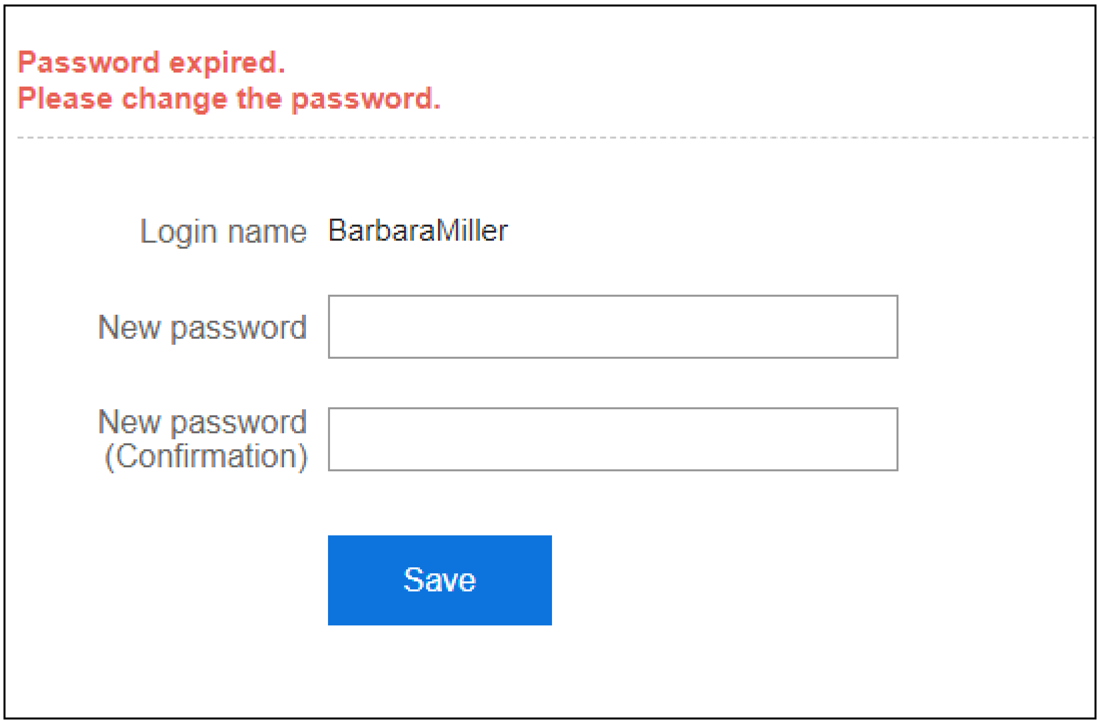
<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Expiration notifications</td><td>You can choose not to notify users of the expiration date, or you can set the date to notify by specifying the number of days before the expiration date.
Set one of the followings.
• Do not notify
• Notify 1 to 999 days before:
Specify the value using an integer.</td></tr>
<tr><td>Limitations on available characters</td><td>Set limitations on available characters so that users can set passwords that are hard to guess for malicious third parties.
The following items can be set.
• Include single-byte characters
◦ Mix upper case and lower case in single-byte characters
This item is displayed when "Include single-byte characters" is selected.
• Include Arabic numerals
• Include special characters
The following special characters can be used.
` ~ ! @ # $ % ^ & * ( ) _ + - = { } | [ ] \ : " ; ' < > ? , . /
• Do not include login names/names</td></tr>
</table>

7. **Confirm your settings and click "Save".**

What Happens When the Expiration Date Has Come

If you set a password expiration date, when the validity period expires, a message prompting the password change appears in the login screen. Click "Change" to change your password.

- Example screen



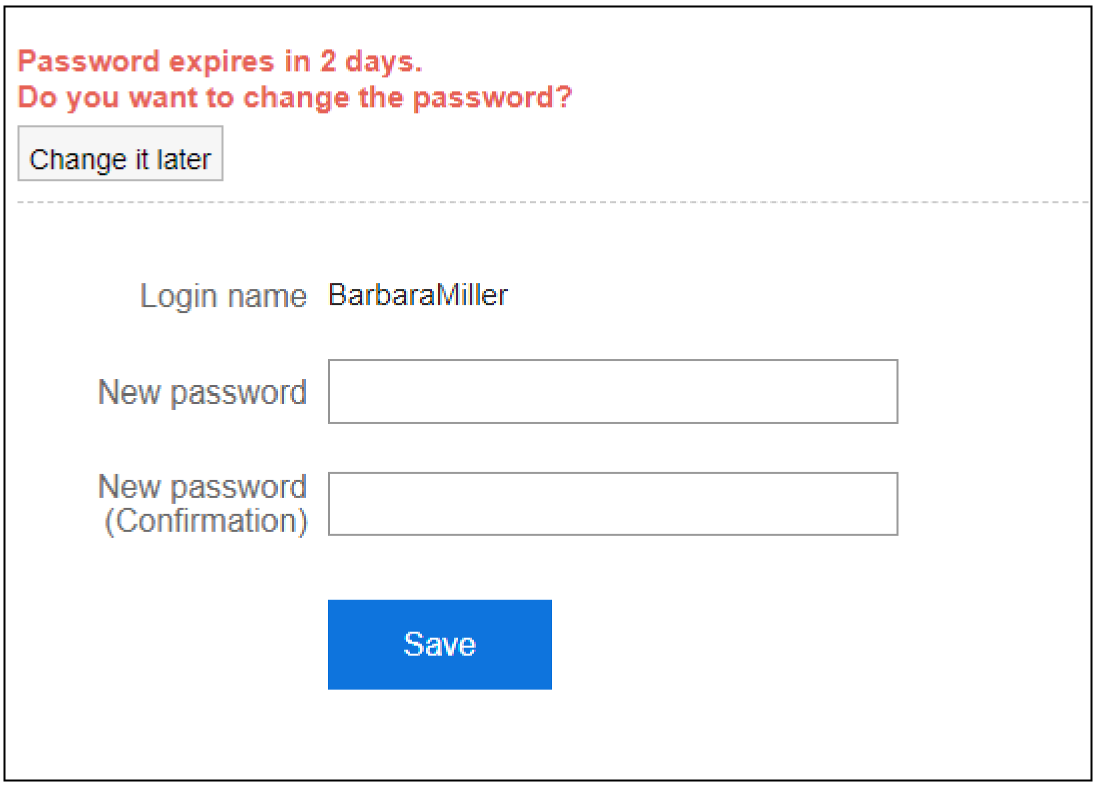
What Happens When the Expiration Date Approaches

If you set an expiration notification, when the expiration date approaches, a message prompting the password change appears in the screen.

Click "Change" to change your password.

To change the password at a later date, click "Change later".

- Example screen



Limitations on the Password String

The following keywords are available for HTML portlets and PHP portlets.

- %Password%
- %Name%
- %Account%
- %Mail%
- %session_password%
- %Tel%
- %URL%

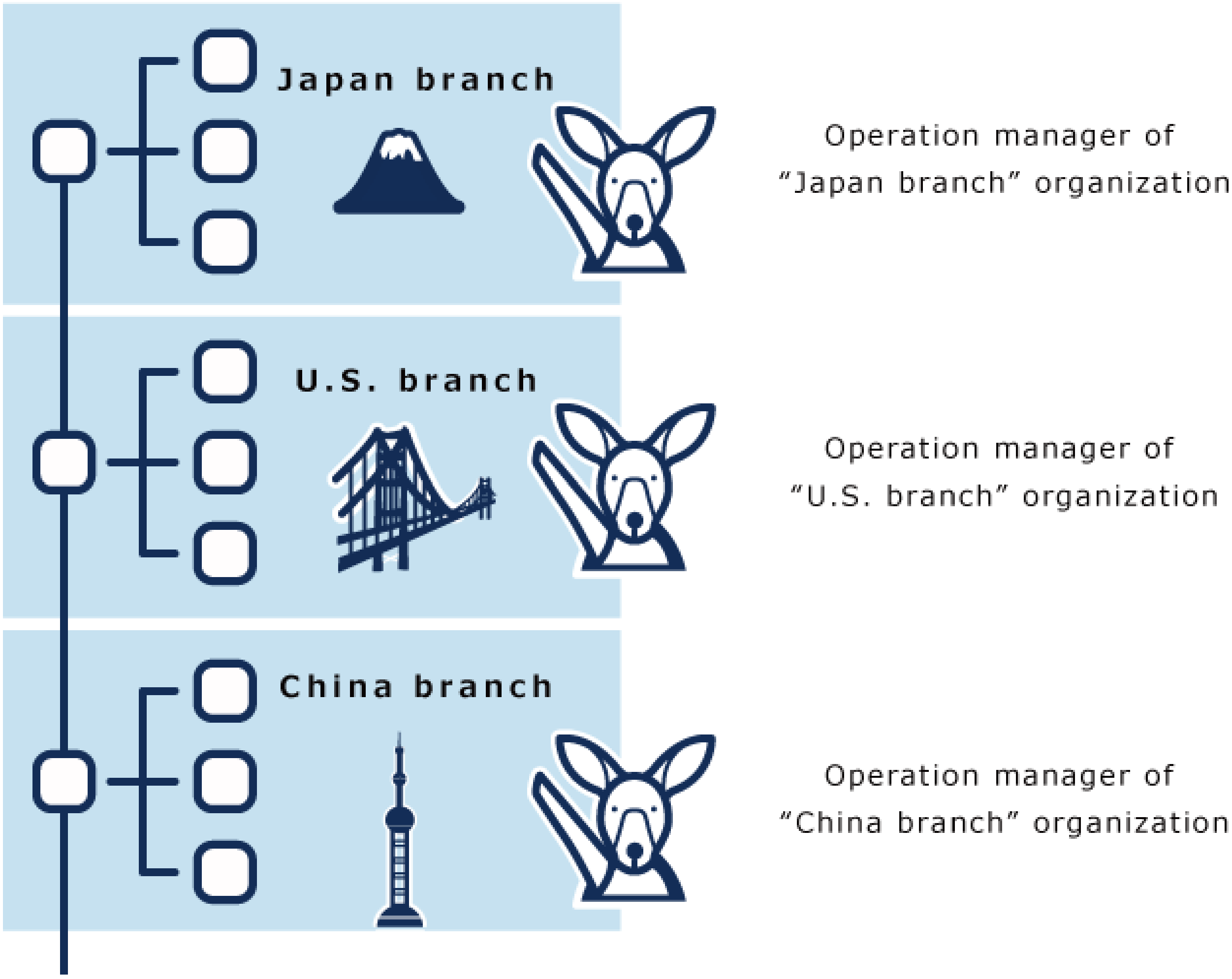
The use of the following half-width symbols among all special characters available to use for the password may cause errors in HTML portlets and PHP portlets.

- Single quotation mark (')
- Double quotation mark (")
- Dollar sign ($)
- Yen sign, backslash ()
- Less than sign (<)
- Greater than sign (>)
- Pipe (|)

1.3.2.8. Managing Operational Administrators for Your Organization

The operational administrators of the organization are users who perform administrative tasks for users and organizations in specific organizations.
The system administrator appoints the operational administrators of the organization.
For example, if you set up the operational administrators of the organization in each branch office, the user modification tasks associated with the personnel change can be completed in each branch office.

Image of Usage



What Operational Administrators Can Do

Operational administrators are authorized to administer organizations and their members.

Authorized users can do the followings.

Notices

View the important announcements screen

View the system information screen

Basic System Administration

- Setting up organizations and users

  They can add child organizations and change members. However, the following limitations apply.

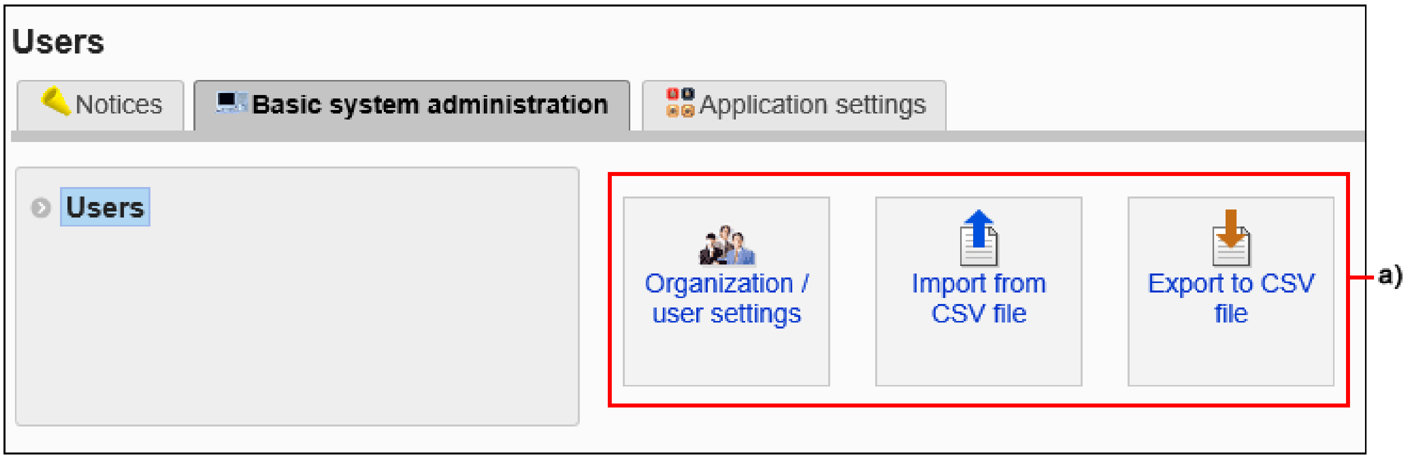
  - To add users, they must select an organization.
  - Child organizations can be moved only to organizations for which they have operational administrative privileges.

- Importing and exporting CSV files

  They can input/output following data using a CSV file, for organizations for which they have operational administrative privileges.
  - Organization details
  - Organization name data
  - Organization member data
  - User profile

Setting Up Operational Administrative Privileges for Organizations

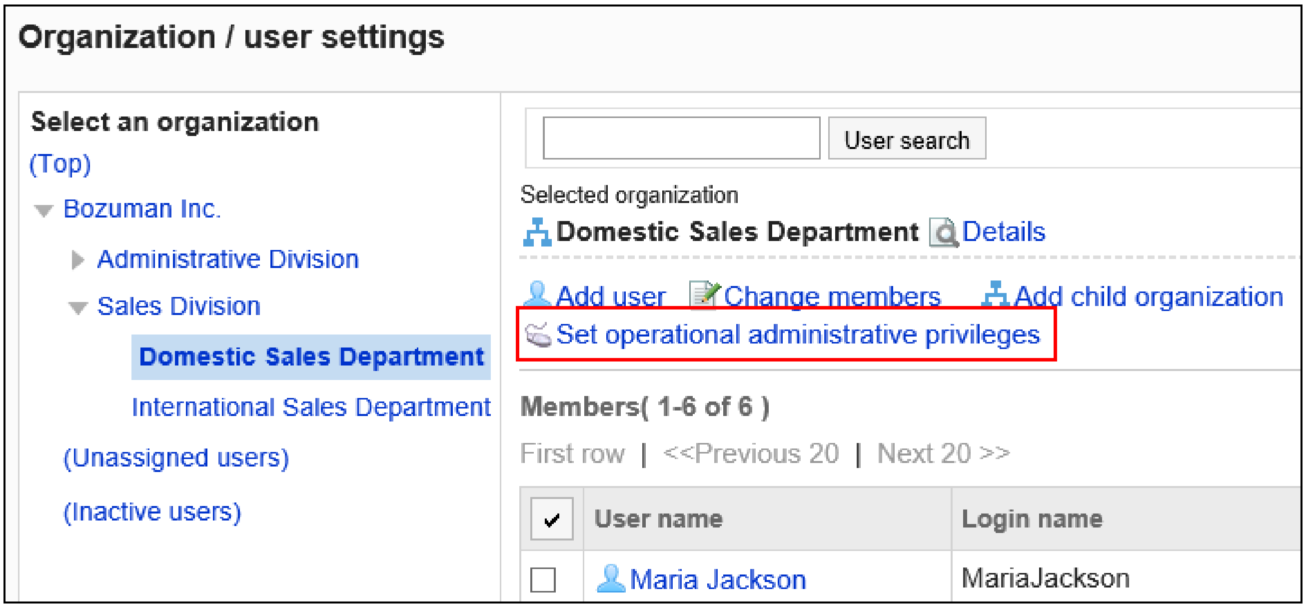
You can set operational administrators for organizations.
Operational administrators can add or delete operational administrators for subordinate organizations where they have administrative privileges.



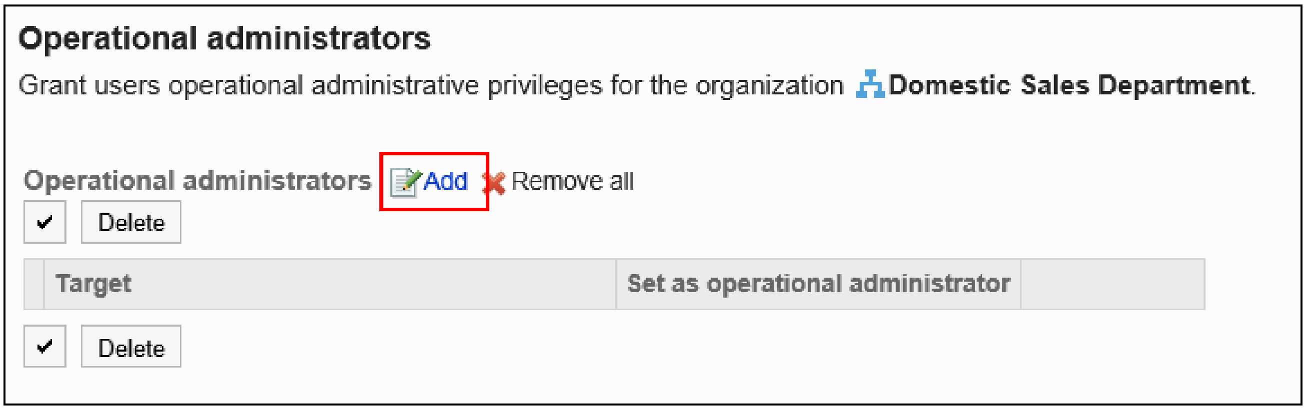
a): The "Basic System Administration" section displays the menus for managing organizations and users.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Organization / user settings.**
6. **On the organization/user setting screen, select an organization, and then click to set operational administrative privileges.**



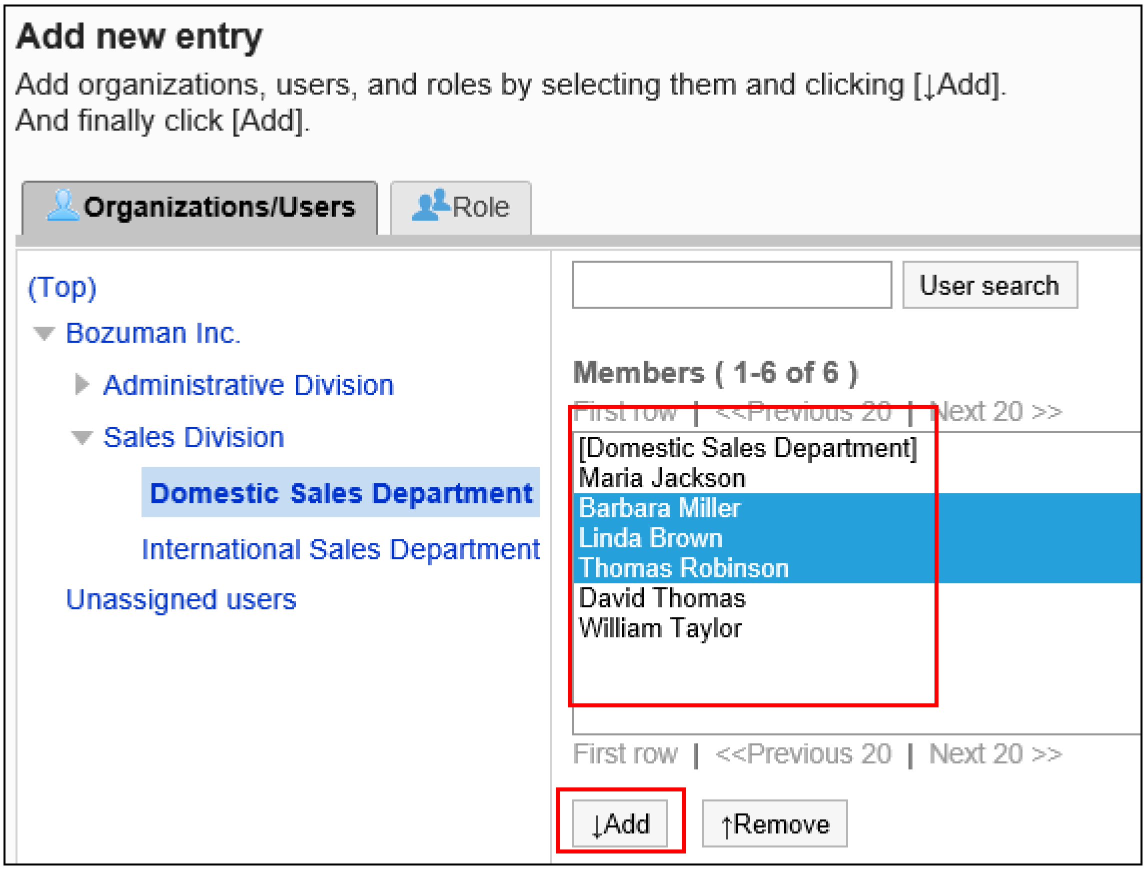
7. **On the screen for List of operational administrative privileges, click "Add".**



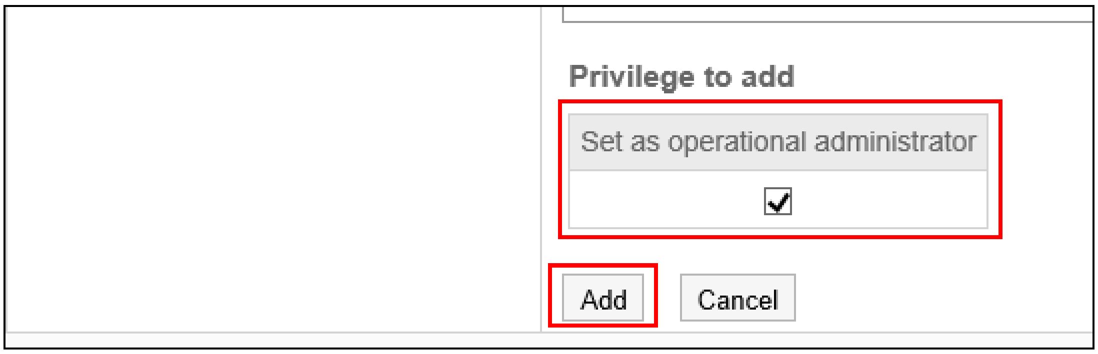
8. **On the screen to add operational administrative privileges, select the organization, user, or role to set privileges, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. Select the check boxes for operational administrator settings for the privileges you want to add, and click "Add".



How to Access Operational Administration Screens

Menu for accessing the system administration screen does not appear on the screen for operational administrator. To access the administration screen, you must enter the URL directly.

This section describes how to access the system administration screen when you installed Garoon in the following environment.

- Installation identifier: cbgrn
- CGI Directory:
  - On Windows: C:\inetpub\scripts

  - On Linux: /var/www/cgi-bin

Steps:

1. **Access the following URLS**
   - On Windows:
     http://(IP address or host name of the server)/scripts/cbgrn/grn.exe/system/index
   - On Linux:
     http://(IP address or host name of the server)/cgi-bin/cbgrn/grn.cgi/system/index
2. **Enter your login name and password, and log in to Garoon system administration.**
3. **Select "Basic system administration" tab.**
4. **Click Users.**

Deleting Operational Administrative Privileges

Delete the operational administrative privileges of the organization.
Users whose operational administrative privileges have been deleted will not be able to access the system administration screen.

Caution

- You cannot restore operational administrators for deleted organizations and users.

Selecting and Deleting Administrative Privileges for Organizations and Users

Select and delete operational privileges for organizations and users.

Steps:

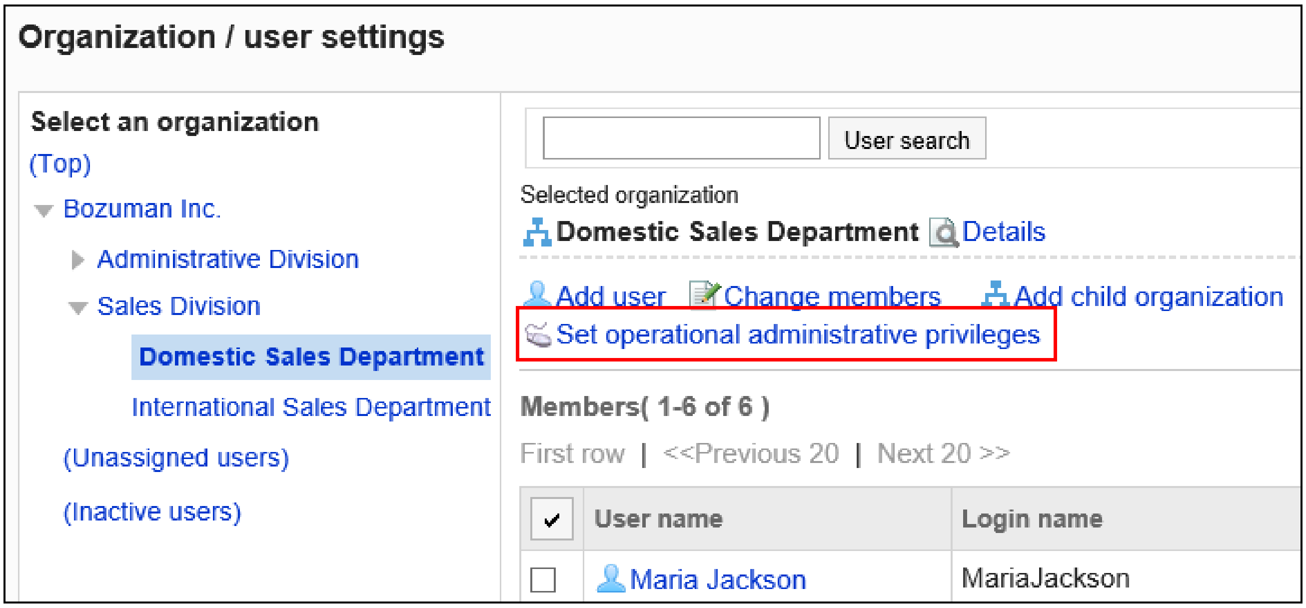
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

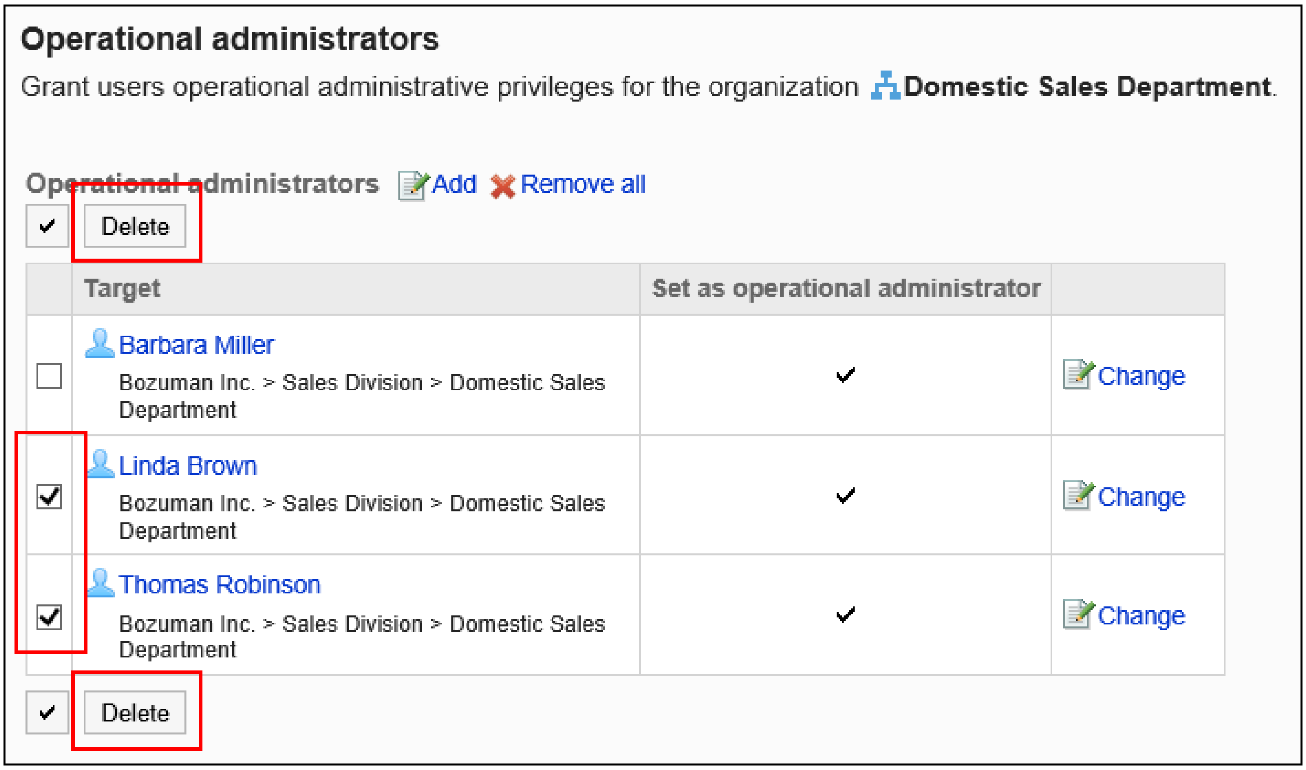
4. **Click Users.**

5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select an organization for which you delete an operational administrator, and then click to set operational administrative privileges.**



7. **On the screen for List of operational administrative privileges, select the check boxes for the target privileges which you want to delete, and then click "Delete".**



8. **Click "Yes" on the screen to delete all operational administrative privileges.**

Deleting Administrative Privileges for All Organizations and Users

Delete all operational privileges for the organization.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

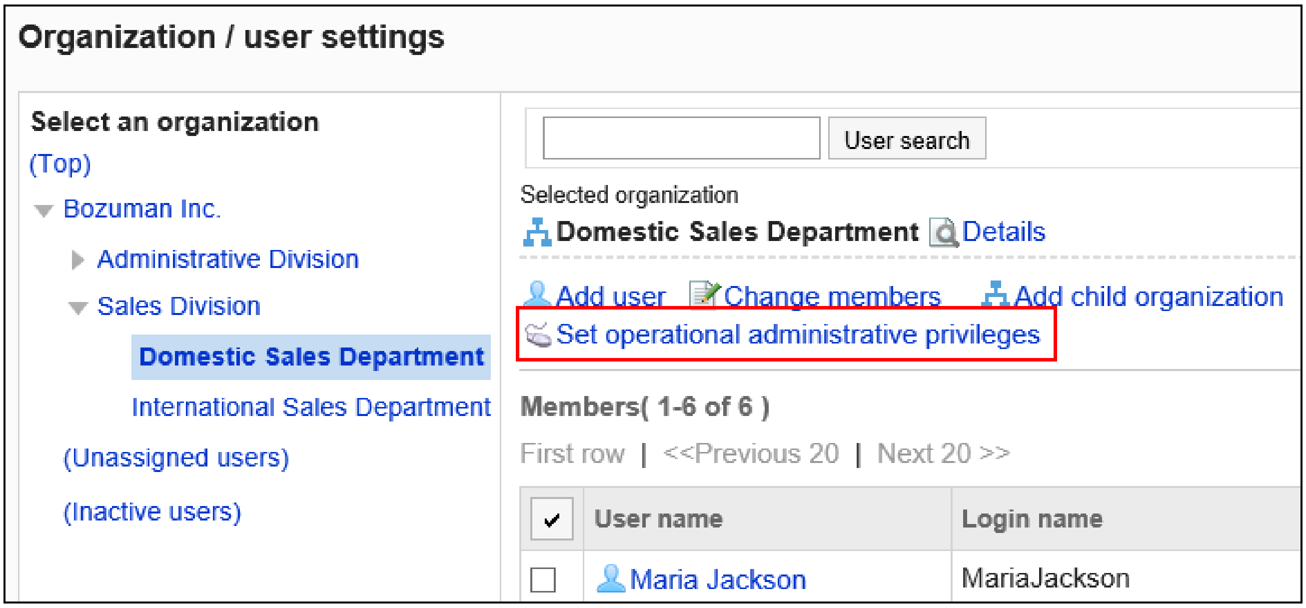
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

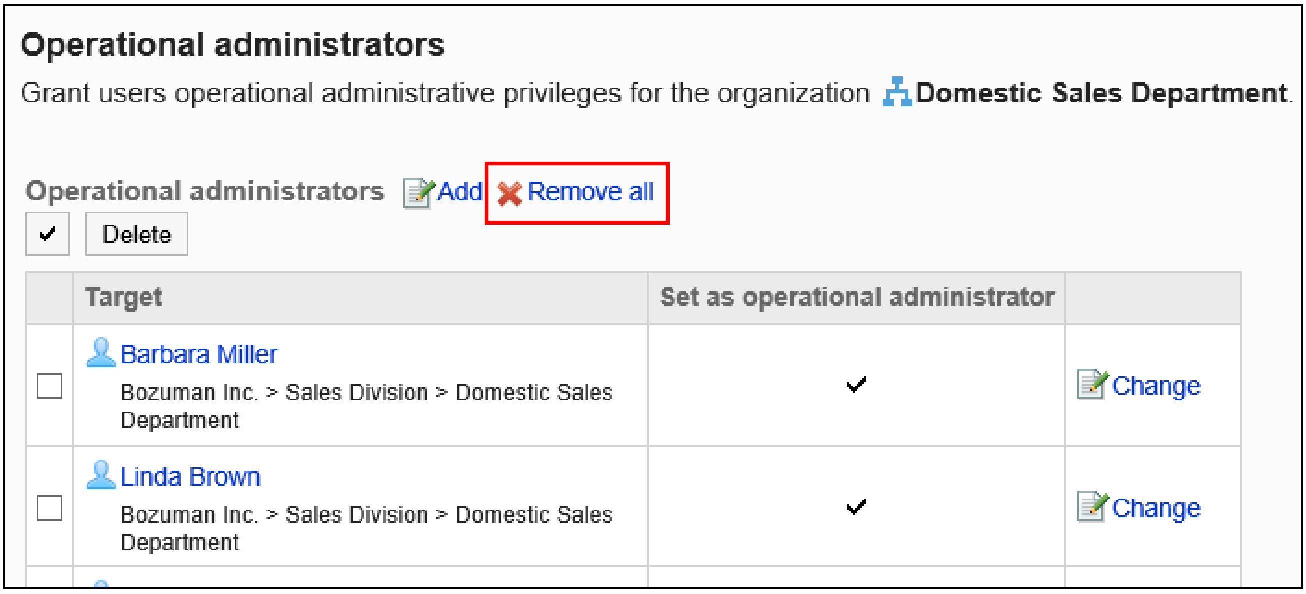
4. **Click Users.**

5. **Click Organization / user settings.**

6. **On the organization/user setting screen, select an organization for which you delete an operational administrator, and then click to set operational administrative privileges.**



7. **On the screen for List of operational administrative privileges, click "Delete all".**



8. Click "Yes" on the delete all operational administrative privileges screen.

1.3.3. Role Settings

This section describes role settings.

References

- What Is a Role?(115Page)
- Adding Roles(117Page)
- Role Permissions(126Page)

1.3.3.1. What Is a Role?

A role represents the position or function that is assigned to a specific group of users.
Example:

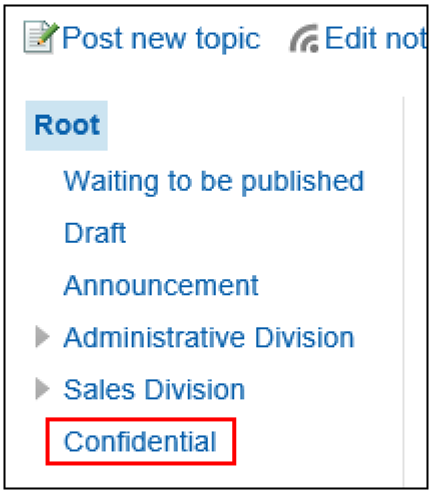
- Manager Role
- Role of new product development team

In Garoon, you can set administrative privileges and permissions for roles.

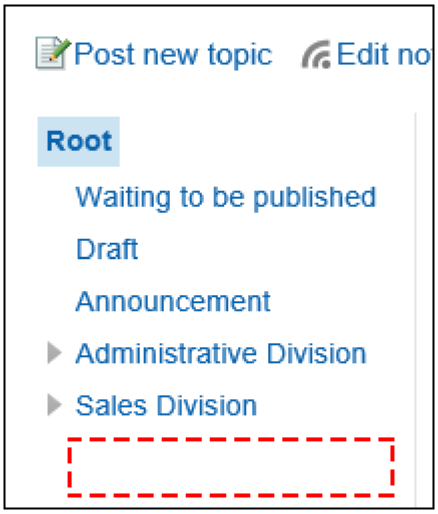
Role Usage Example

This is an example of assigning a role called "manager" for the managers of Human Resources and Accounting departments.
You can set the permissions to use the "confidential" category in the bulletin board for "manager" role.
Depending on the permission settings, the category looks like the following.

- Users who have been assigned the "manager" role:
  The "confidential" category is displayed on the bulletin board.



- Users who have not been assigned the "manager" role:
  The "confidential" category is not displayed on the bulletin board.



Preconfigured Roles in Garoon

The following roles are set by default.

Dynamic roles

Users are dynamically assigned to these roles. These roles do not appear in the role list.

The following roles are available

- Everyone:
  All users have this role. When Everyone is selected as a target of permissions, the permissions granted to Everyone are applied to all users automatically.
- LoginUser:
  Logged-in user has this role. When LoginUser is selected as a target of permissions, the permissions granted to LoginUser are applied to each user during the user logs in Garoon.
- Owner:
  Currently, no user exists for this role.
- CommandLine:
  Role that is assigned when running from the command line.

Static roles

Users are fixed for this role.

- Administrators:
  Role with system administration privilege.

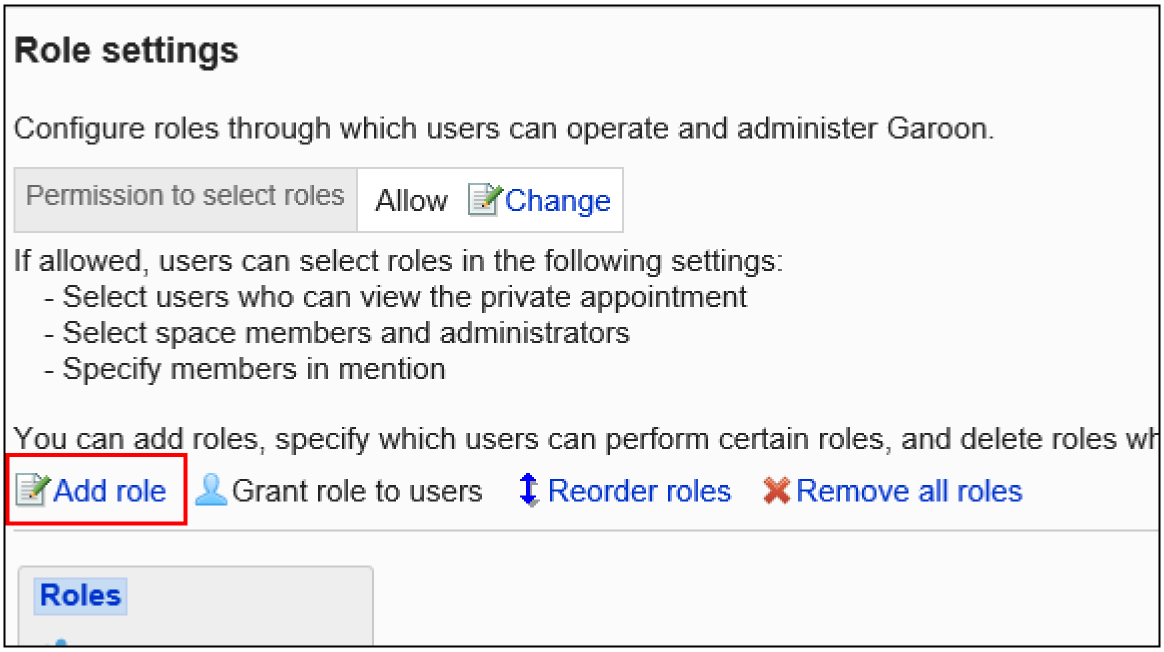
1.3.3.2. Adding Roles

You can add roles. Only static roles can be added.

You cannot use the same role name as any roles pre-configured(116Page) in Garoon.

Steps:

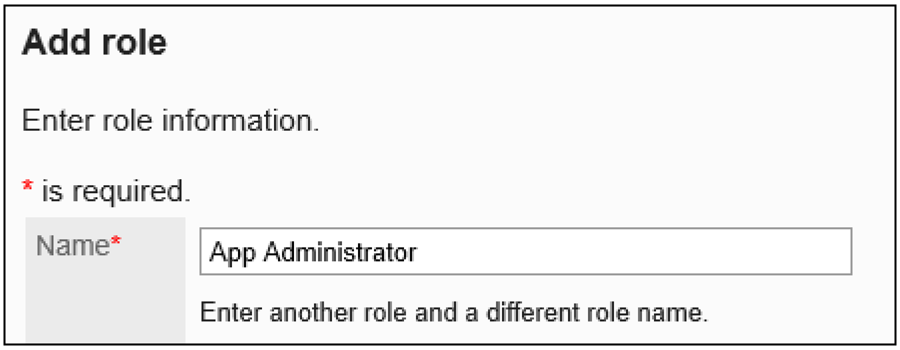
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "Role settings".**
6. **On the "Role Settings" screen, click "Add Roles".**



7. **On the screen to add roles, enter the role name field.**

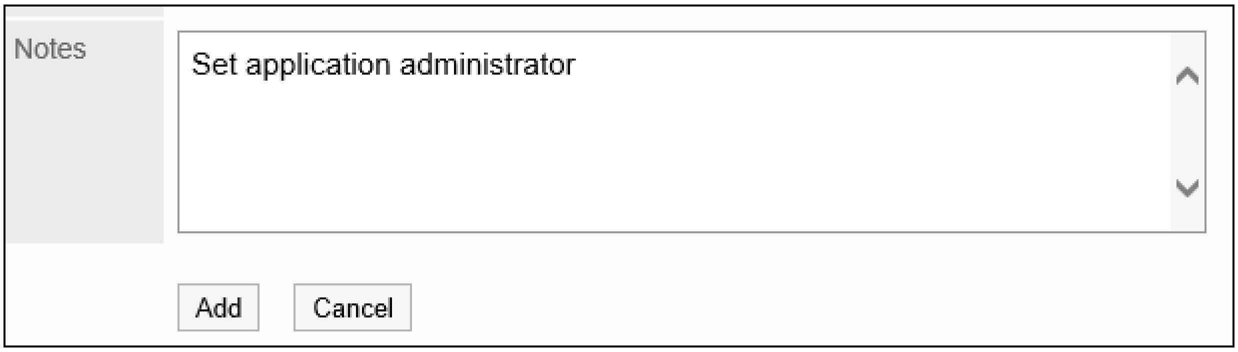
   This role name is mandatory.

   Enter an unique role name for identifying a role.



8. Set the Notes field as necessary.

Enter notes regarding roles, such as role descriptions and role usages.



9. Confirm your settings and click "Add".

1.3.3.3. Changing Roles

This section describes how to change roles.

Changing Role Information

You can change the role information.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

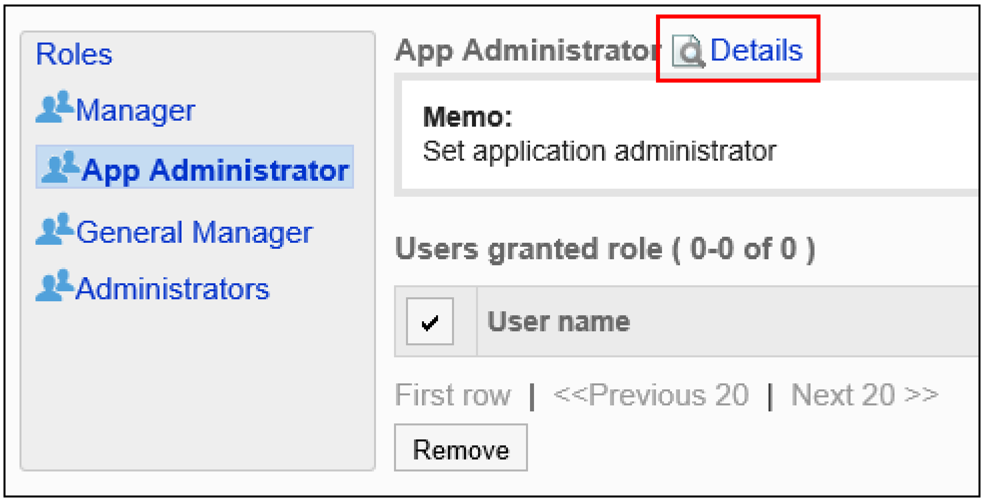
2. Click "System settings".

3. **Select "Basic system administration" tab.**

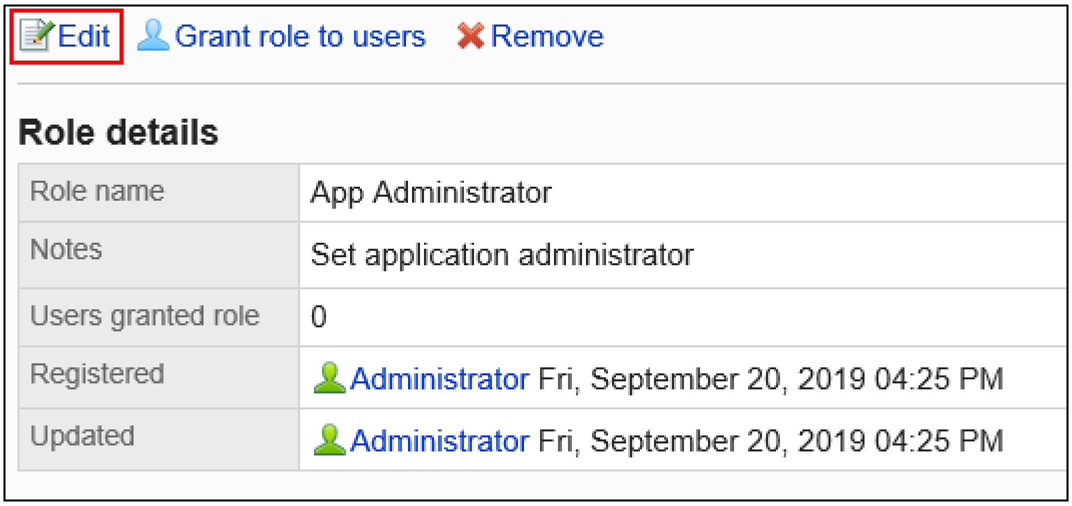
4. **Click Users.**

5. **Click "Role settings".**

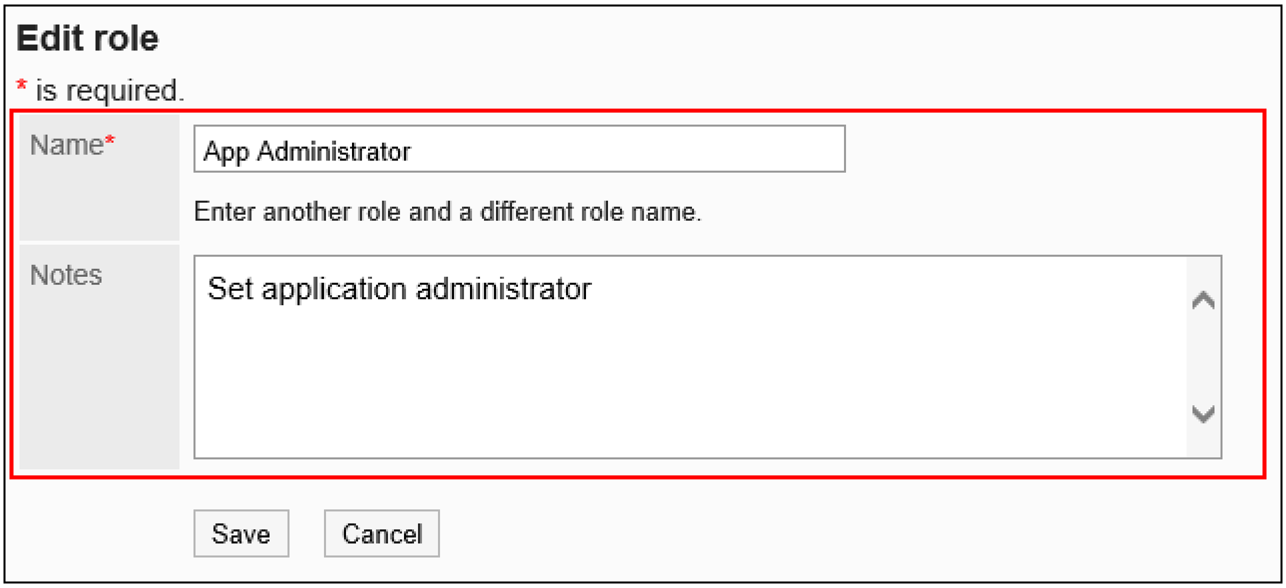
6. **On the "Role Settings" screen, select a role and click "Details".**



7. **On the role details screen, click "Edit".**



8. **On the screen to change roles, set the required items. You cannot use the same role names as the names of other roles.**



9. Confirm your settings and click "Save".

Assigning Roles to Users

You can assign roles to users.

Note

- If you want to set up multiple roles for one user, you can change the roles in bulk from the user details screen.
  For details, see the "Changing User Roles(80Page)" section.
- When you use CSV files, you can change the roles of users in bulk.
  For details, see the "Managing Organizations, Users, and Roles in a CSV File(161Page)" section.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

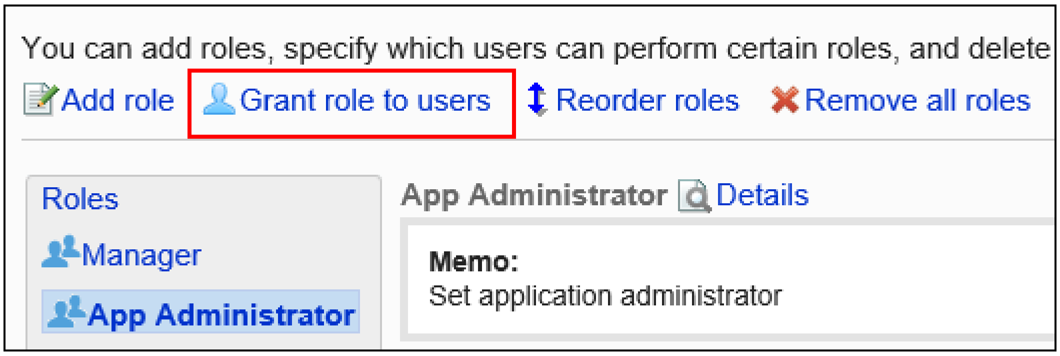
2. Click "System settings".

3. Select "Basic system administration" tab.

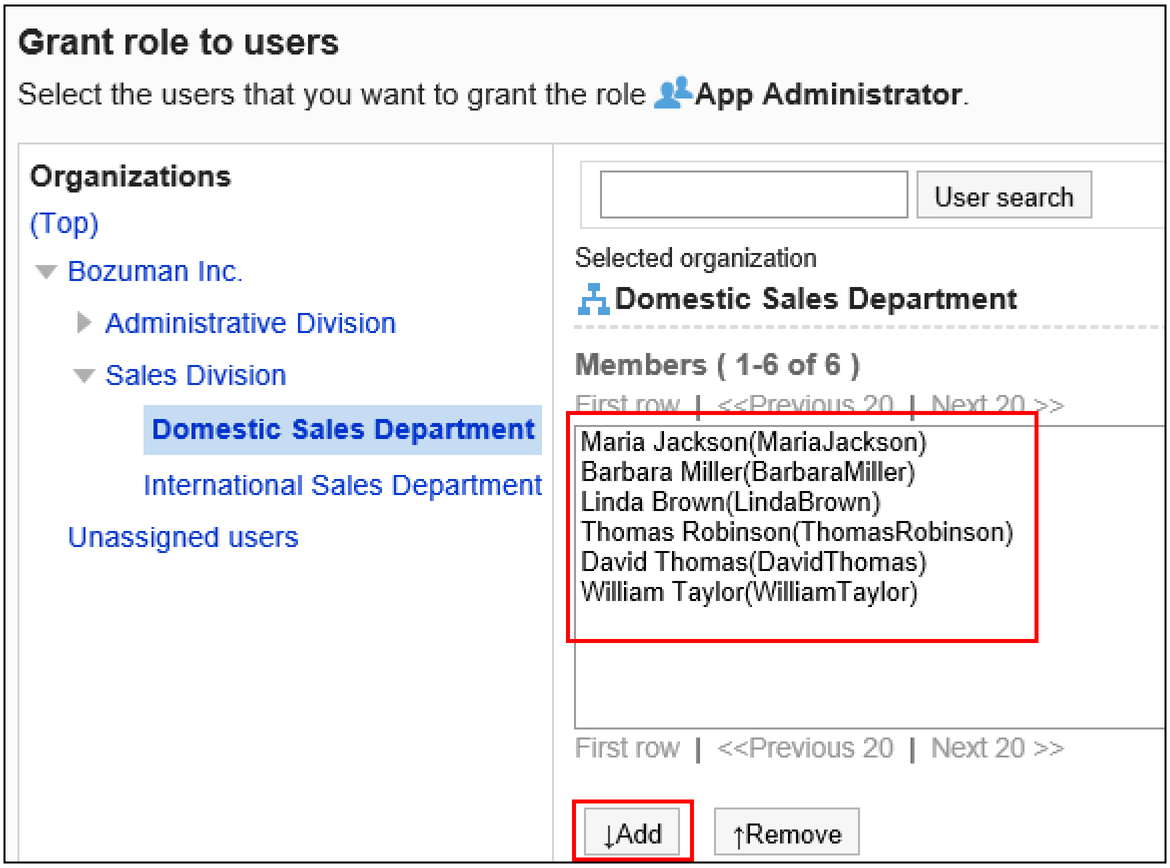
4. Click Users.

5. Click "Role settings".

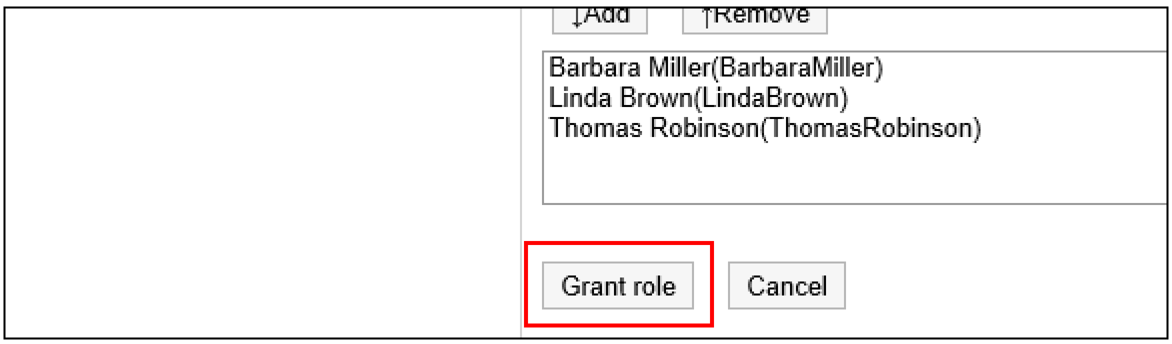
6. **On the "Role Settings" screen, select a role, and then click the button to assign the role.**



7. **On the role setting screen, select the users to whom you assign roles, and then click "Add".**

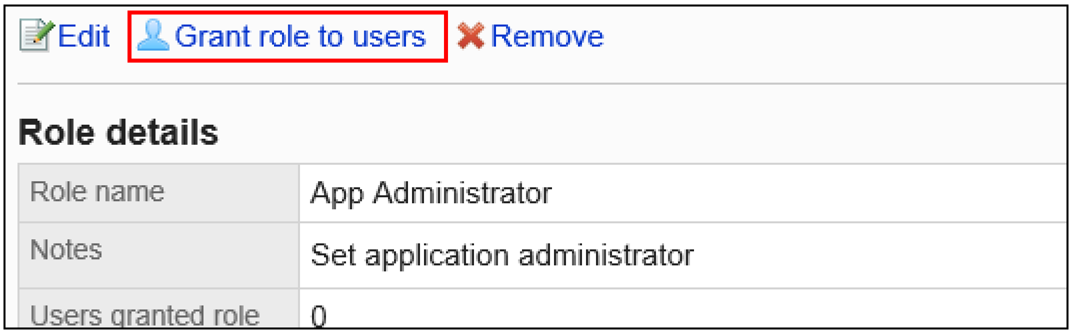


8. **Click the button to assign.**



Note

- You can also assign roles by clicking the button to assign roles on the role details screen.



Reordering Roles

You can change the order of roles that are displayed in the role list.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

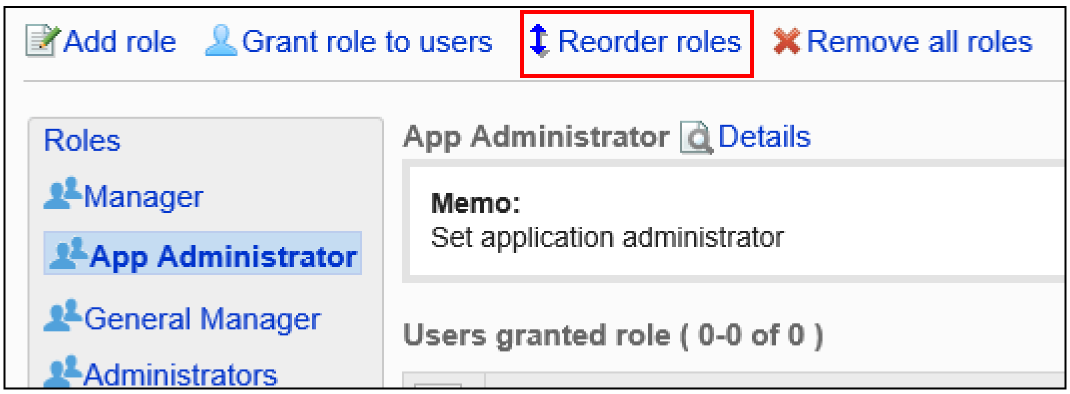
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

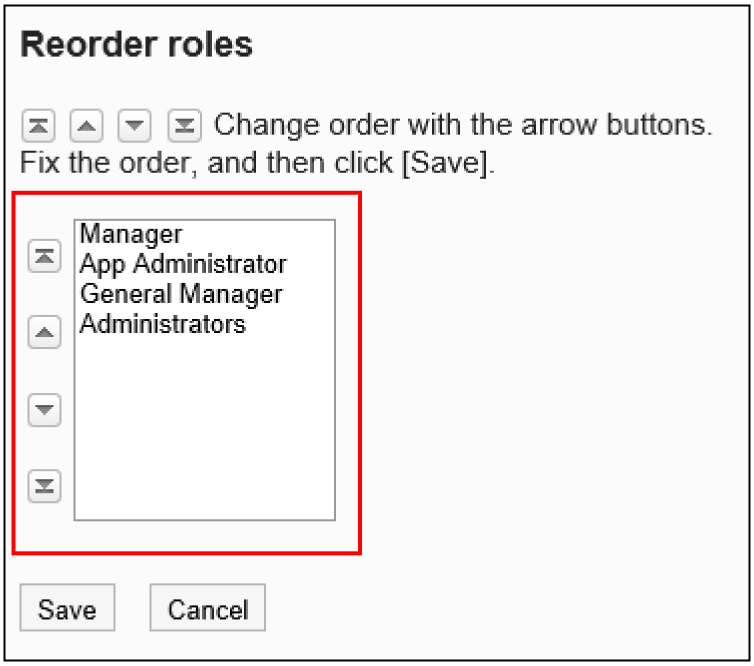
4. **Click Users.**

5. **Click "Role settings".**

6. **On the "Role Settings" screen, click "Reorder Roles".**



7. **On the screen to reorder roles, change the order of roles.**



8. **Confirm your settings and click "Save".**

Deleting Users from Roles

You can delete users from roles.

The permissions and operational administrative privileges assigned to roles are deleted from users.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

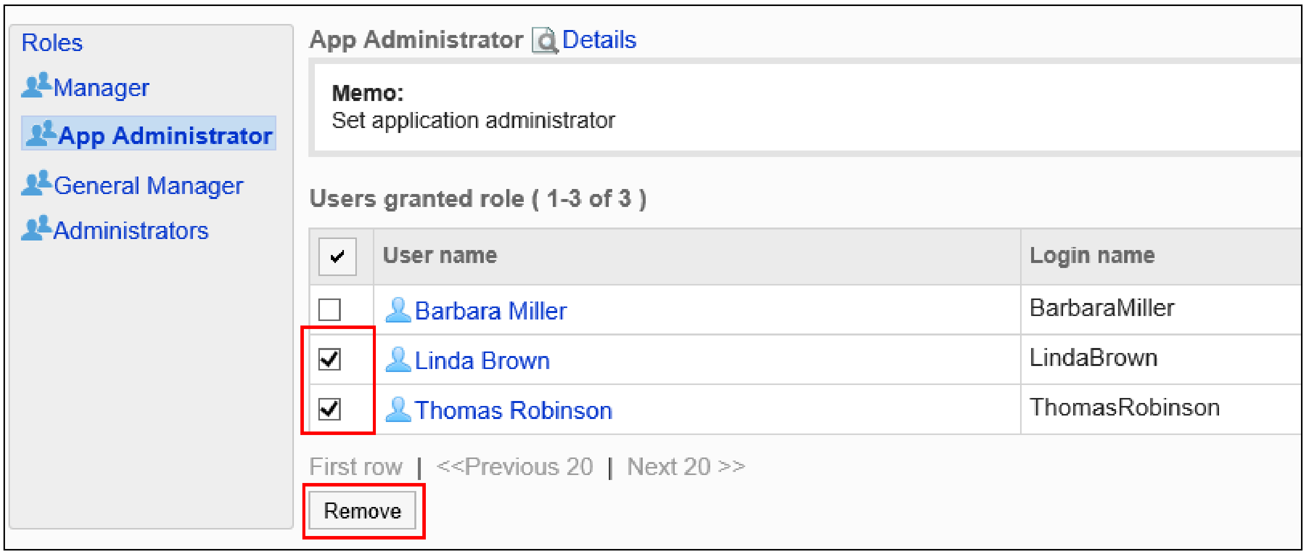
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

5. **Click "Role settings".**

6. **On the "Role Settings" screen, select the check boxes of users who you want to delete from the role, and then click "Delete".**



7. Click "Yes" on the Delete All Users screen.

1.3.3.4. Deleting Roles

You can delete roles.

If you delete a role, the permissions and operational administrative privileges set for the role are also deleted.

The Administrators role cannot be deleted.

Caution

- Deleted roles cannot be restored.

Deleting Roles One by One

You can delete roles one by one.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

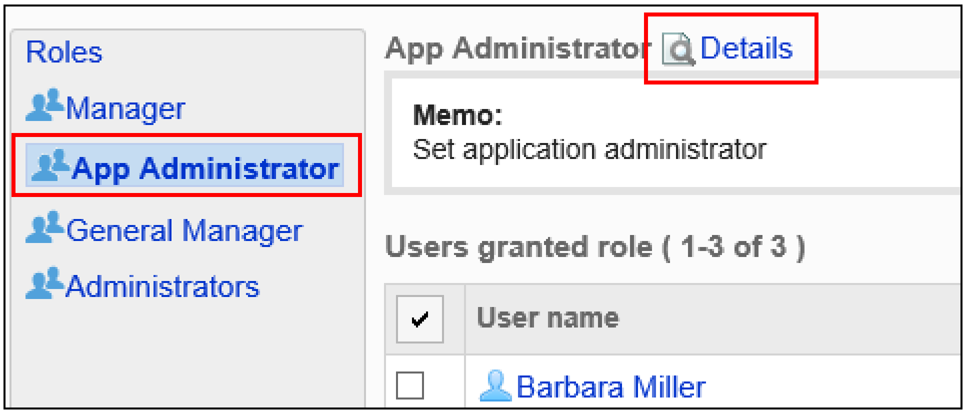
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

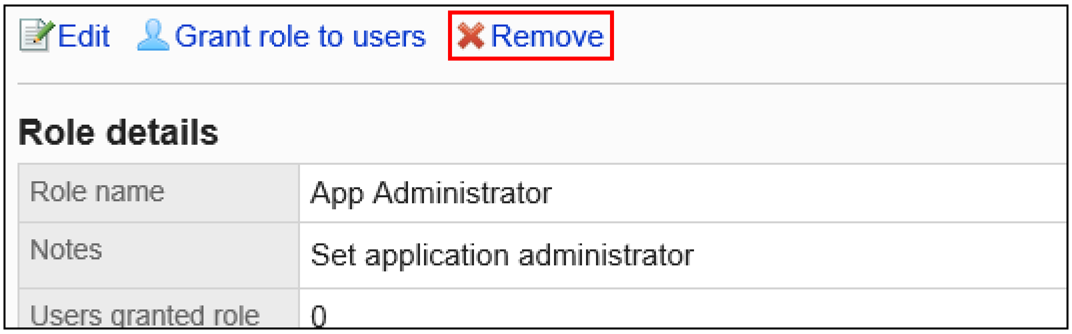
4. **Click Users.**

5. **Click "Role settings".**

6. **On the "Role Settings" screen, select the roles you want to delete, and then click "Details".**



7. **On the role details screen, click "Delete".**



8. **Click "Yes" on the screen to delete roles.**

Deleting All Roles

You can delete all roles.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

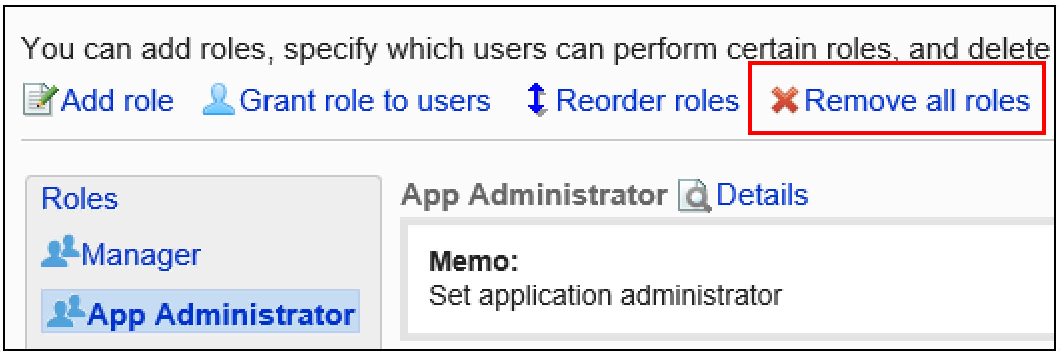
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

5. **Click "Role settings".**

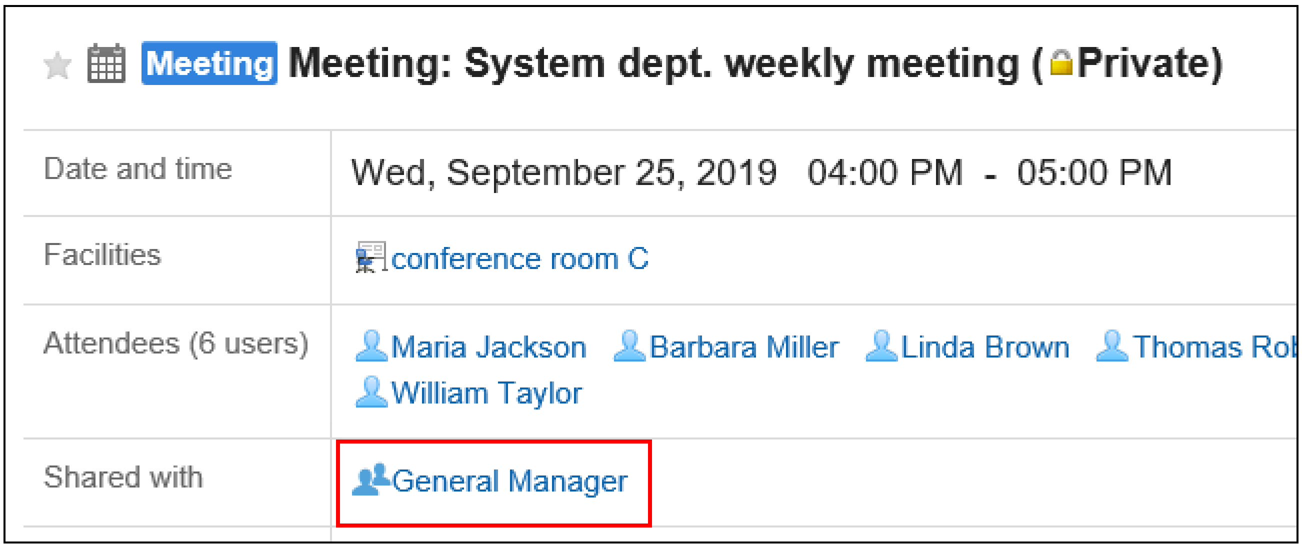
6. **On the "Role Settings" screen, click "Delete all Roles".**



7. **Click "Yes" on the screen to delete all roles.**

1.3.3.5. Role Permissions

This section describes how to allow users to use roles.



By allowing users to select roles, users can select roles in the following settings:

- "Shared with" users of the appointment
- Select space members and administrators

- Specify recipients using "@Mention"
  Users can specify roles as recipients of comments.
  For details on the Mention feature, refer to the Working with Mentions.

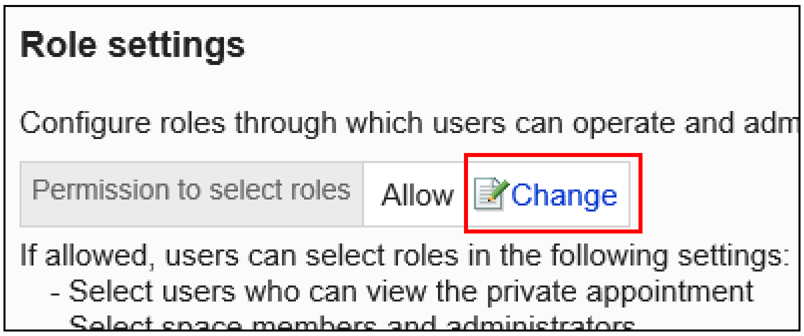
You can always select roles on the system administration screen and the operational administration screen regardless this setting.

Note

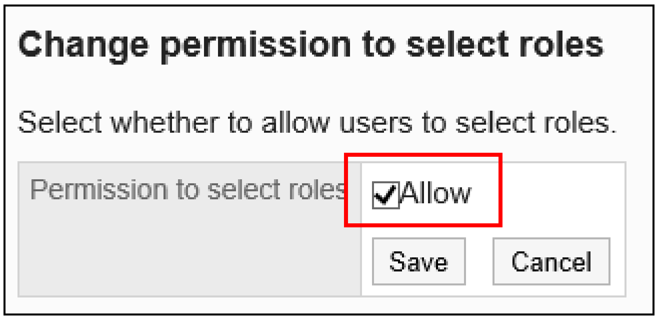
- The following roles can be selected on the user screen:
  - Everyone
  - Administrators
  - LoginUser

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click "Role settings".**
6. **On the "Role settings" screen, click "Edit".**



7. **On the screen for allowing role selection, select the Allow check box and then click "Save".**



1.3.4. Tentative Reorganization

This section describes about the tentative reorganization.

References

- Overview of Tentative Reorganization(128Page)
- Confirming Tentative Reorganization(131Page)
- Creating a Tentative Structure(133Page)
- Managing Organizations and Members with a Tentative Structure(136Page)
- Applying a Tentative Structure(155Page)

1.3.4.1. About Tentative Structure

You can use the tentative reorganization feature to do the following:

- Creating a tentative structure by duplicating the current organizations and users
- Applying the tentative structure to the current environment now, or applying at the specified date and time

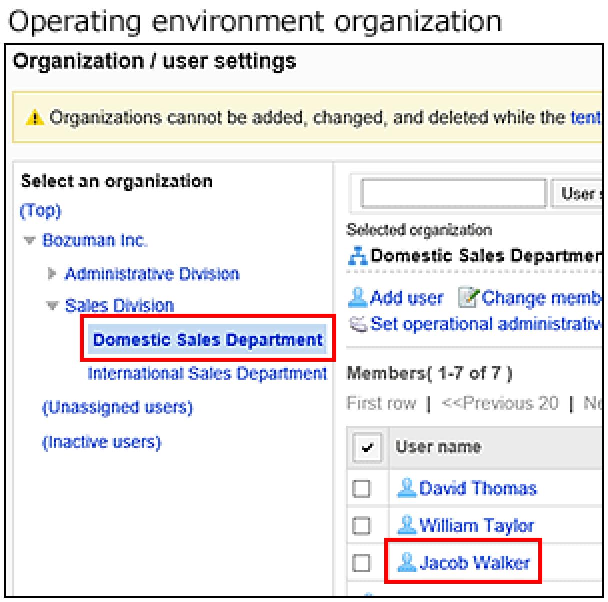
The tentative structure is not visible to users until you apply it to the current environment.

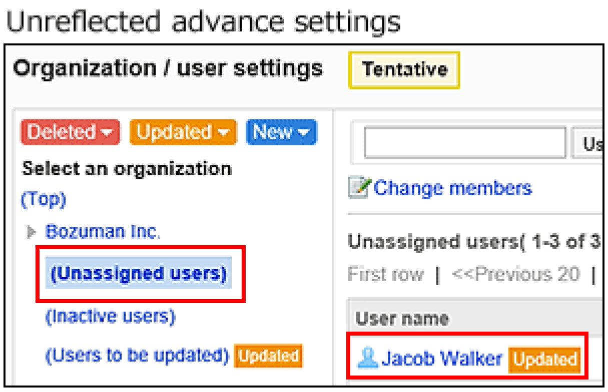
Caution

- When a tentative structure exists, the following are disabled:
  - Adding, changing, deleting, and reordering the current organizations
  - Importing file to add, update, delete the current organizations
  - Changing languages in the "Selectable languages" settings in the General settings screen for Localization
- Once the tentative structure has been applied to the current organization or deleted, you will be able to add, change, and delete the current organization.

Note

- You can not add users to the tentative structure.
- You can not create a tentative structure by importing a CSV file.
- You can add users to the current environment even when an unapplied tentative structure exists.
  If you add users to the current environment, they will automatically be added to the tentative structure.
  In the tentative structure, the added users belong to "Unassigned users". Organizations and roles assigned to the added users in the current environment are not applied to the tentative structure.
  Before you can apply the tentative structure to the current environment, you must set up the membership and roles again.





Tentative Structure Settings

The following items can be set for the tentative structure.

Item	Tentative structure
Add child organizations	✓
Change child organizations • Organization name data • Organization code • Memo	✓
Move organizations	✓
Reorder child organizations	✓
Delete organizations	✓
Change organization members	✓
Operational administrator settings	
Add users	
Editing User Profile • Office • Organization membership • Priority organization • Display order • Status	✓
Editing User Profile • Name • Login name • password • Locale • Pronunciation • E-mail • Notes • Job title • Contacts • URL • Picture	

Item	Tentative structure
• Custom items	
Change roles	✔
Deleting Users	

1.3.4.2. Reviewing Tentative Structure

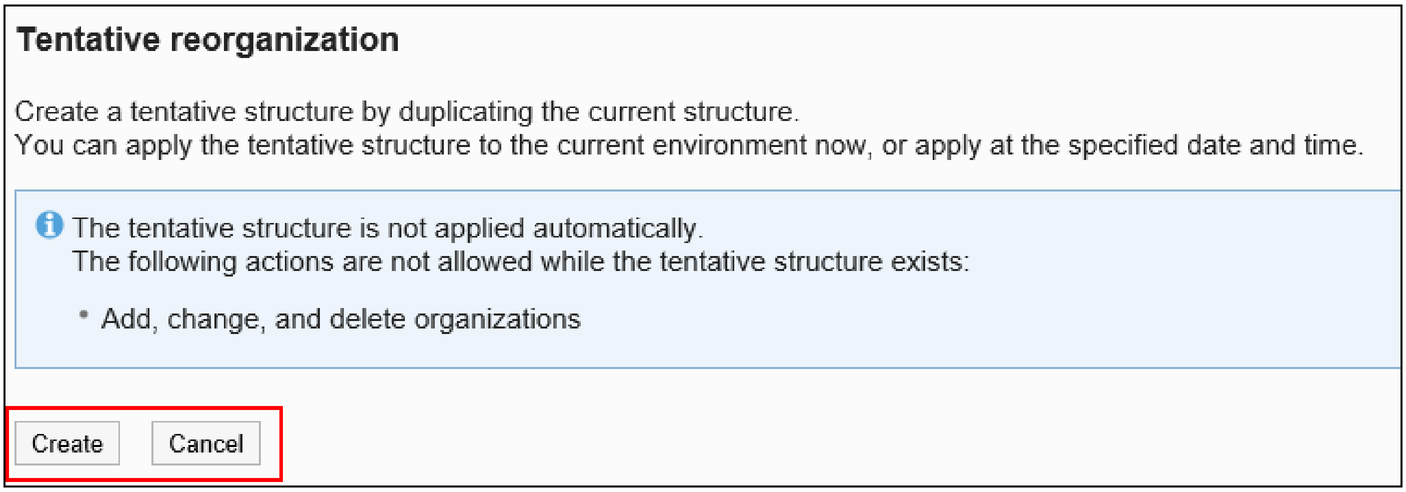
Confirm the status of the tentative structure.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **Check which of the following conditions apply to the tentative structure screen.**
   - No tentative structure exists.
   - A tentative structure exists without applying to the current environment
   - A tentative structure with the date to be applied to the current environment exists

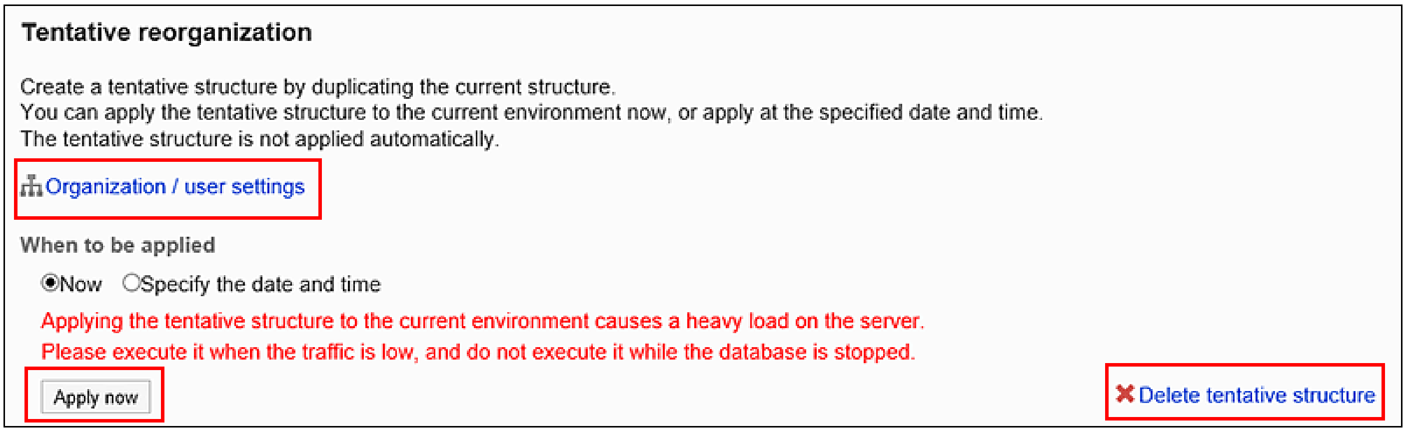
When a Tentative Structure Not Applied to the Current Environment Does Not Exist

The Create and the Cancel buttons are displayed.



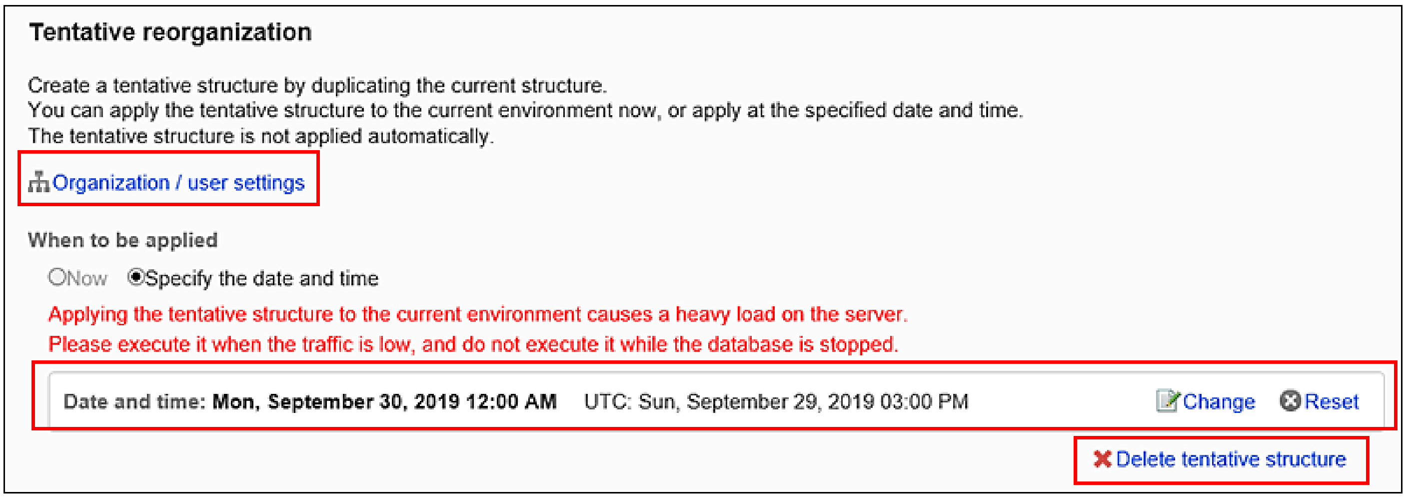
When a Tentative Structure Not Applied to the Current Environment Exists

The Organization / user settings and the Delete tentative structure links are displayed.



When a Tentative Structure with Date/Time Specified to Apply to the Current Environment Exists

The Organization / user settings and the Delete tentative structure links, and Date and time are displayed.



1.3.4.3. Creating Tentative Structure

You can create a tentative structure by duplicating the current structure.
The tentative structure is not applied to the current structure until you apply it to the current environment.
When a tentative structure exists, the following are disabled in the current environment:

- Adding, changing, deleting, and reordering the current organizations
- Importing file to add, update, delete the current organizations

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

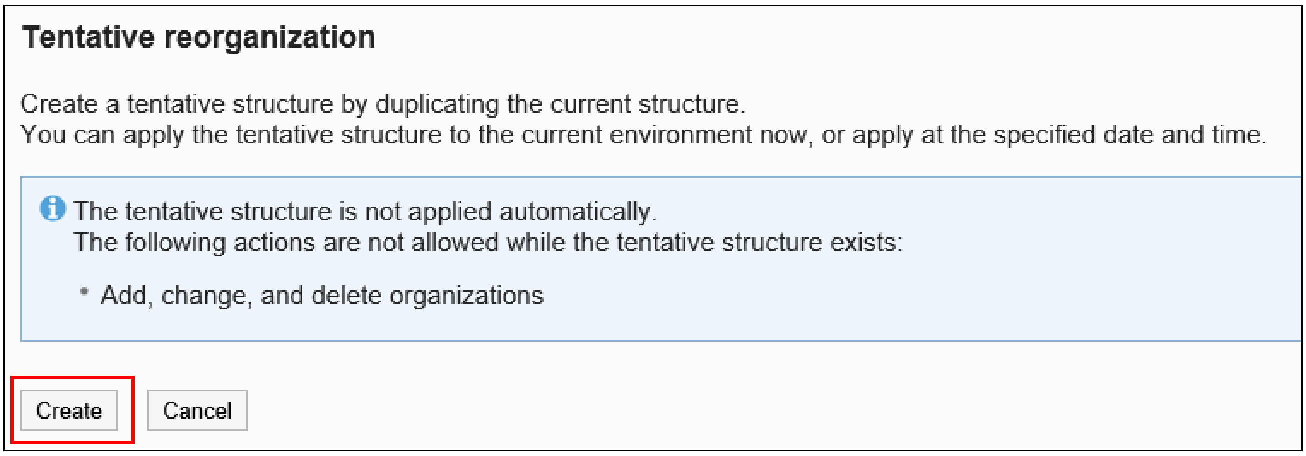
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

5. **Click Tentative reorganization.**

6. **On the Tentative reorganization screen, click Create.**



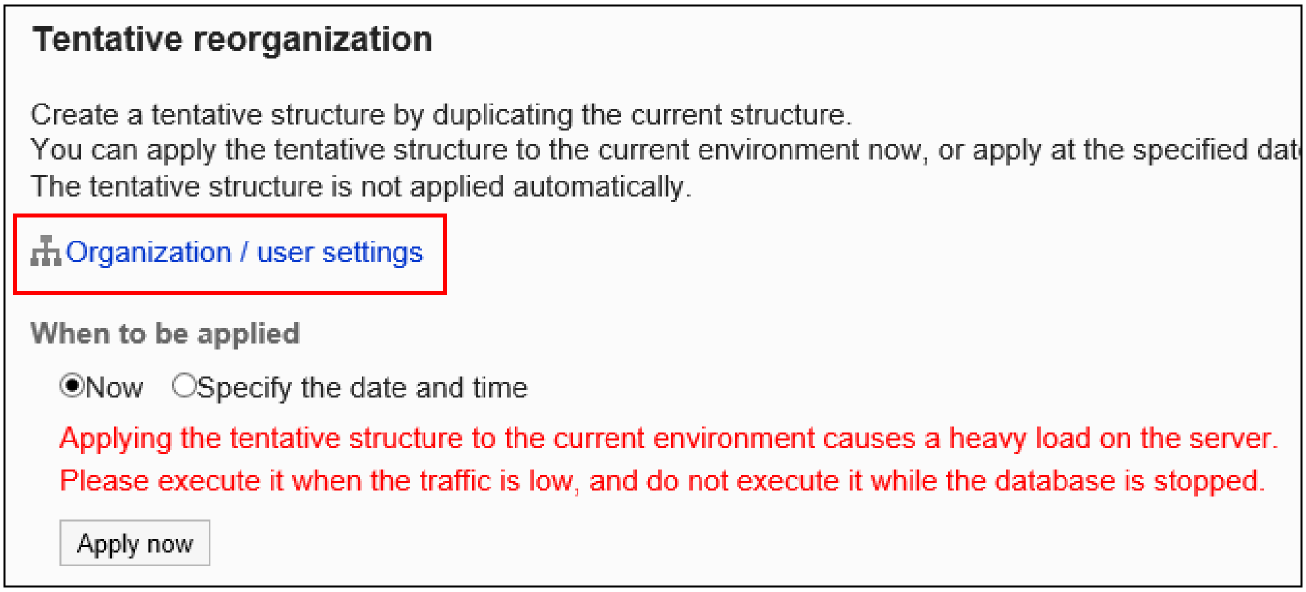
A message saying "The tentative structure is being created" is displayed.

7. **Wait a while and refresh the page.**

8. **Confirm that "Organization / user settings" is displayed on the Tentative reorganization screen.>**

When you click "Organization/user Settings", the "Organization/user Settings" screen is displayed, allowing you to create organizations, change organizations, or assign organization members using a tentative structure.

For details, see the "Managing Organizations and Members with a Tentative Structure(136Page)" section.



1.3.4.4. Deleting Tentative Structure

You can delete the tentative structure before apply it to the current environment.

By deleting the tentative structure, you can do the following:

- Adding, changing, deleting, and reordering the current organizations
- Importing file to add, update, delete the current organizations

Caution

- Once deleted, the tentative structure cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

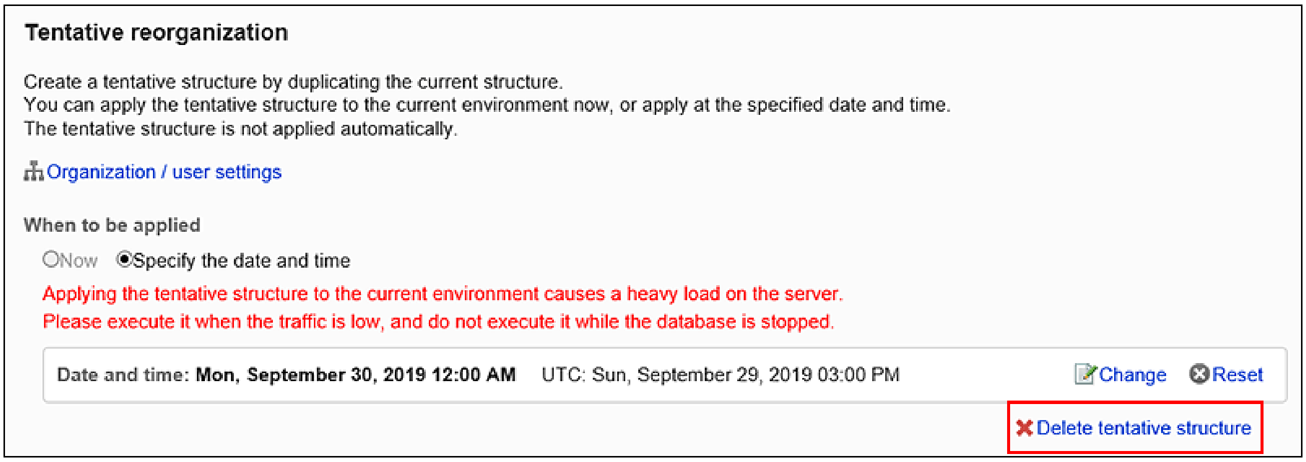
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

5. **Click Tentative reorganization.**

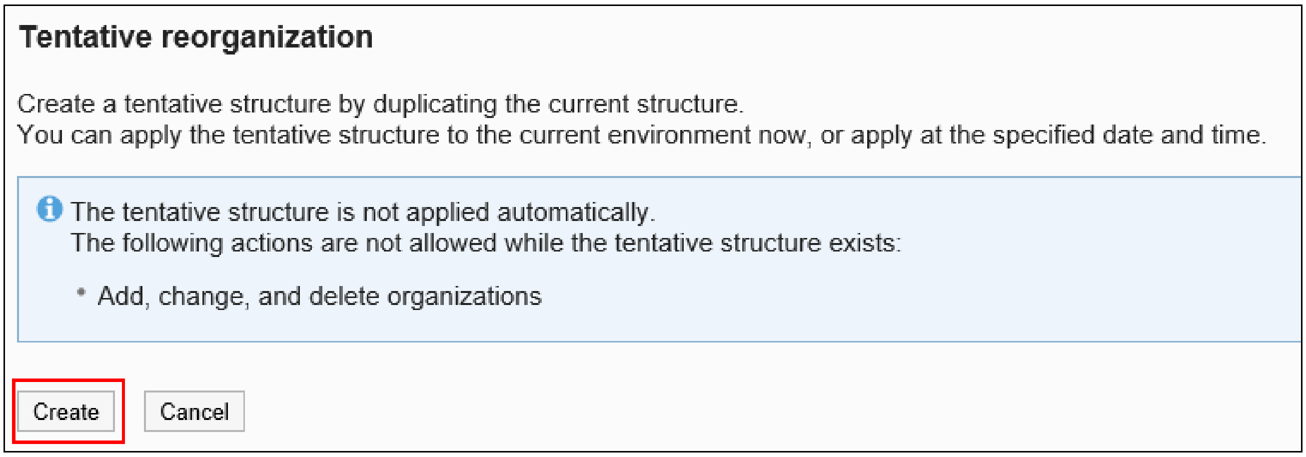
6. **On the tentative reorganization screen, click Delete tentative structure.**



7. **Click "Yes" on the screen to delete tentative structure.**

8. **Wait a while and refresh the page.**

9. **Confirm that "Create" is displayed on the tentative reorganization screen.**



1.3.4.5. Setting up Organizations and Users Assigned in a Tentative Structure

This section describes how to set up organizations, assign members, and change user profile.

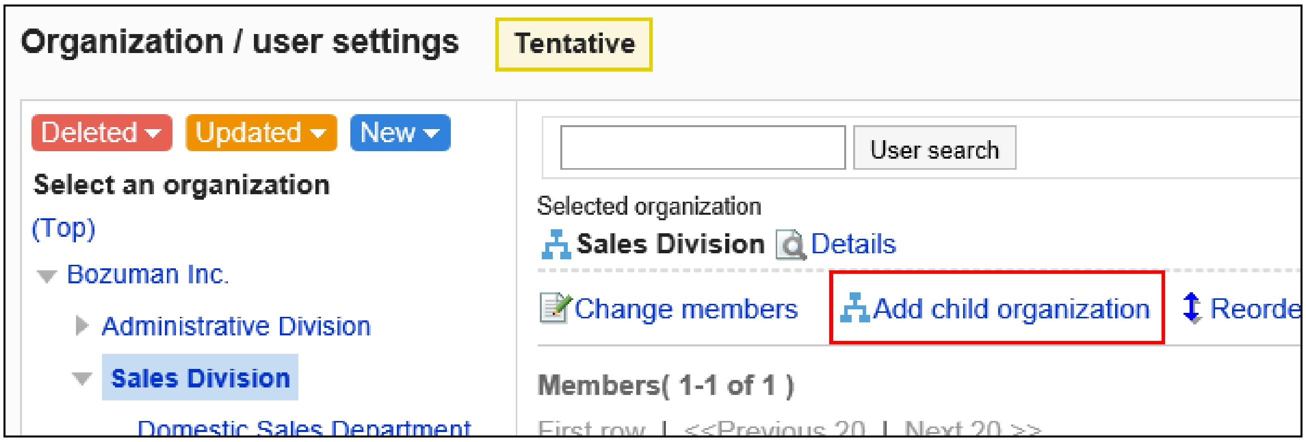
You perform these actions after the process described in the "Creating a Tentative Structure(133Page)" section.

Adding Organizations

Add organizations to the tentative structure. Organizations can contain nested organizations.

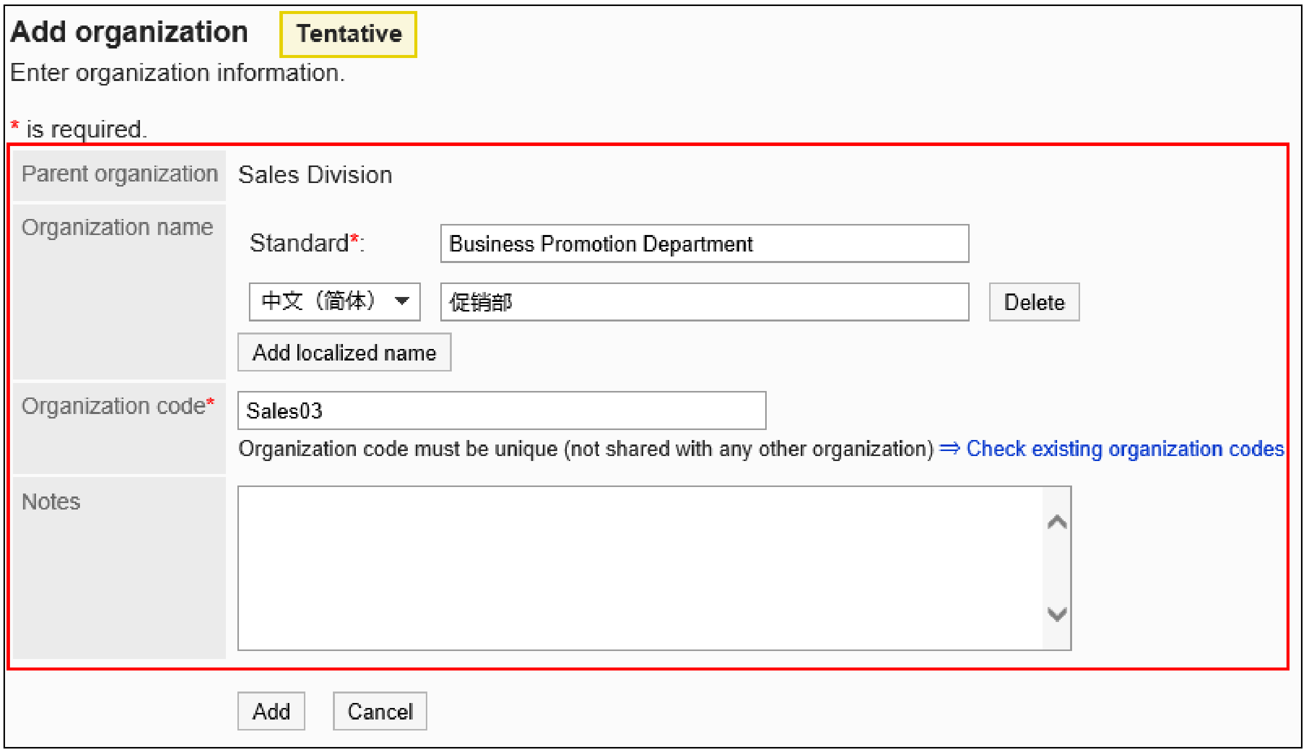
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the tentative reorganization screen, click organization/user setting.**
7. **On the organization/user setting (tentative) screen, select "Top" or an organization, and click "Add Child organization".**



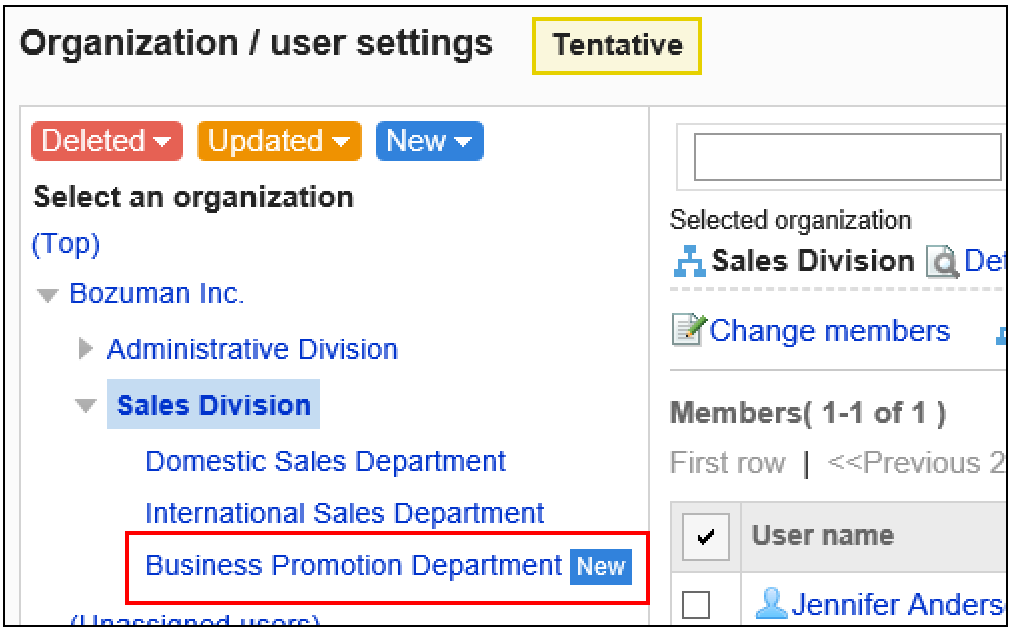
8. **On the screen to add organizations (tentative), set the required items.**

   For details, see the items for setting organizations(57Page).



9. **Confirm your settings and click "Add".**

10. **On the organization/user setting (tentative) screen, confirm that New is displayed for the organization you have added.**



Assigning Users to a Tentative Organization

You can assign users who do not belong to any organization or users who belongs to an organization to a tentative organization.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

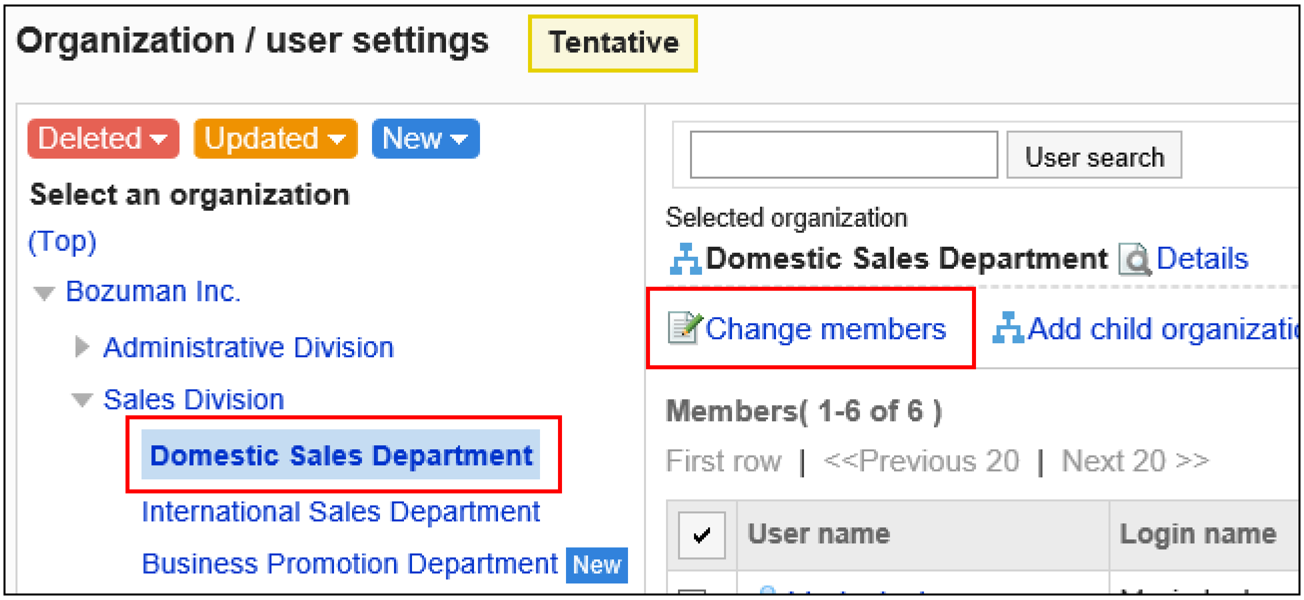
3. **Select "Basic system administration" tab.**

4. **Click Users.**

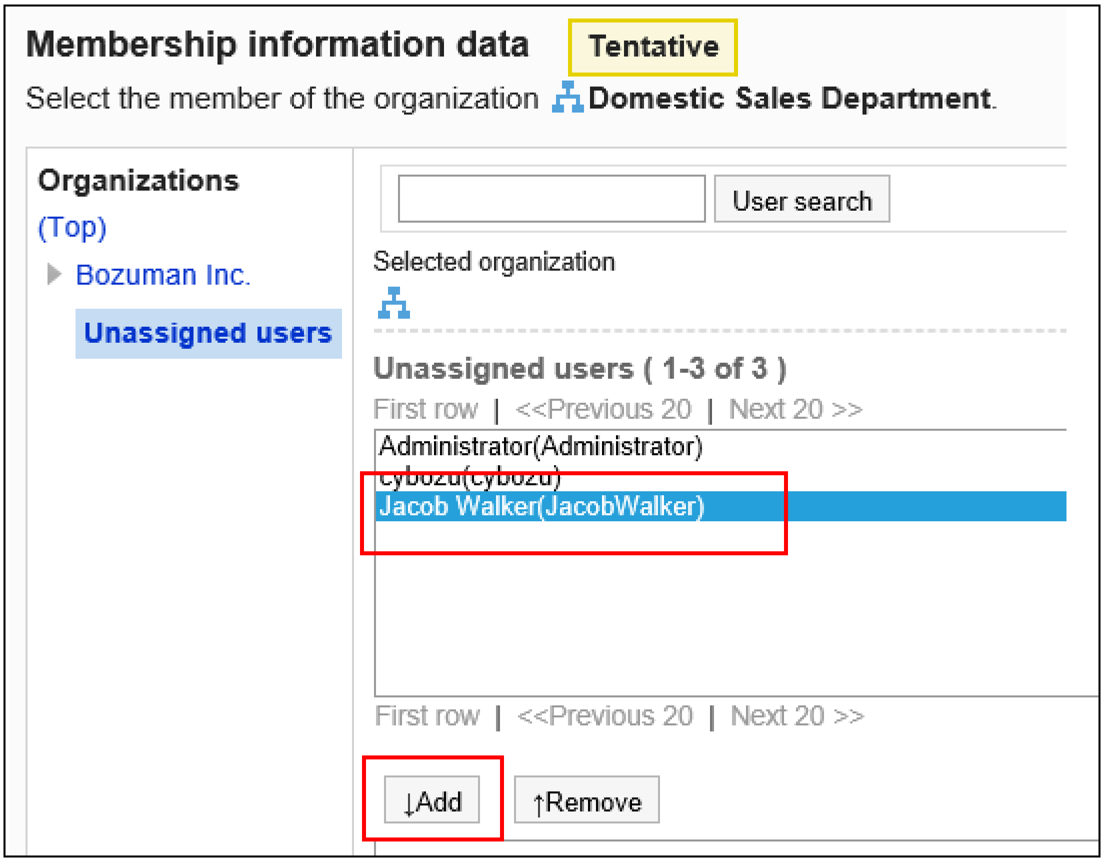
5. **Click Tentative reorganization.**

6. **On the tentative reorganization screen, click organization/user setting.**

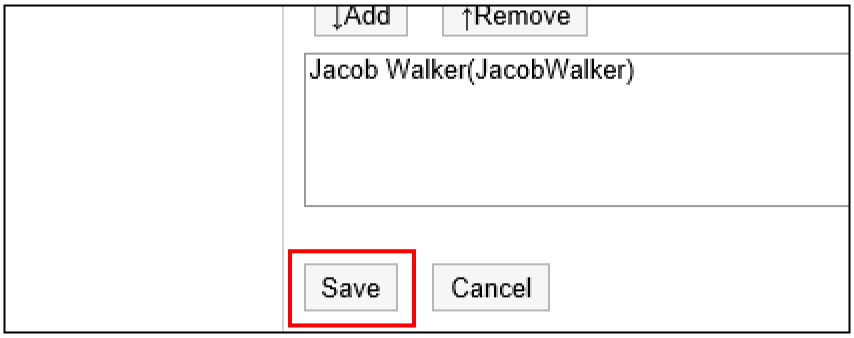
7. **On the organization/user setting (tentative) screen, select an organization, and then click "Change Members".**



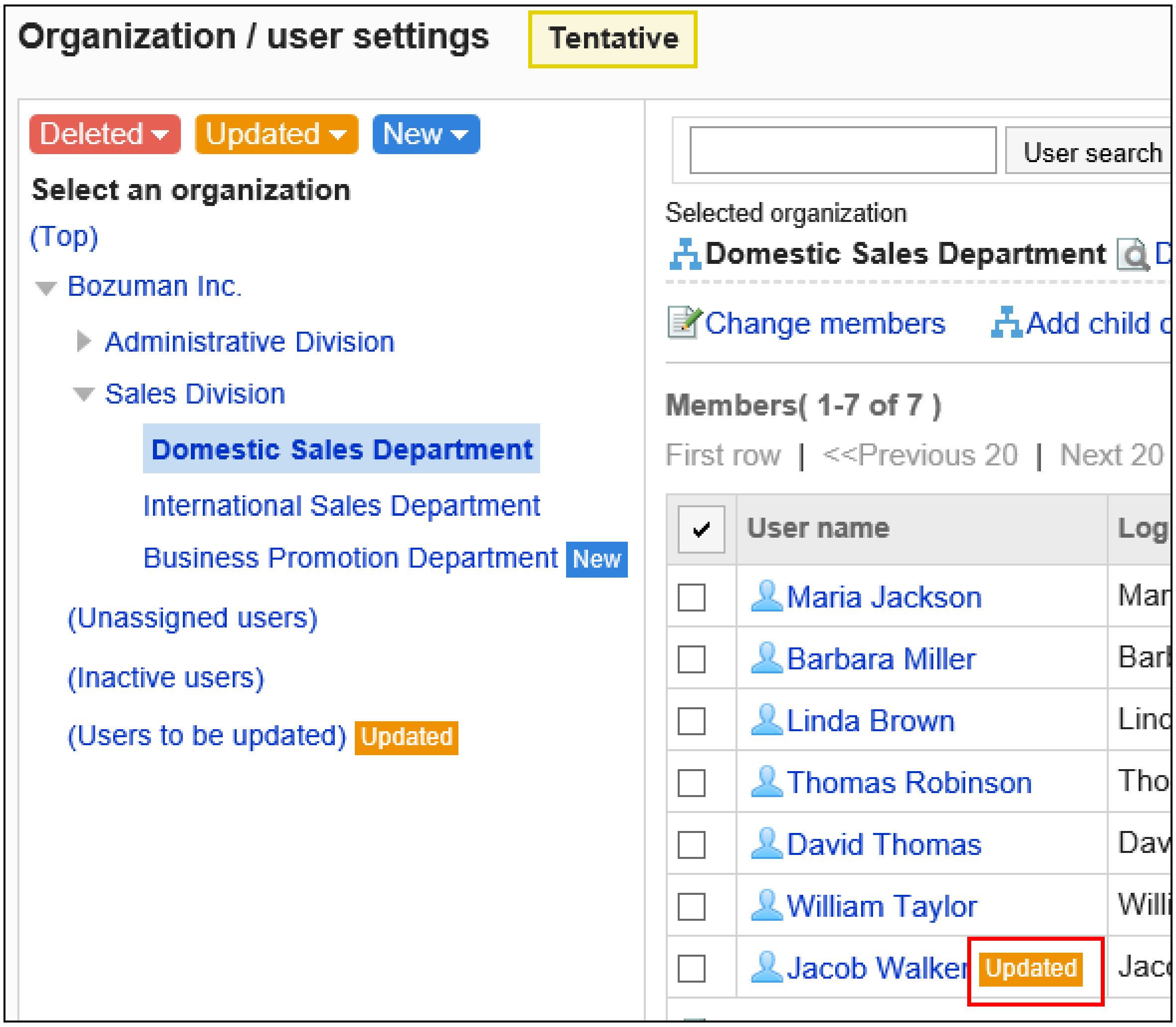
8. **On the membership information data (tentative) screen, select the user who you want to assign to the organization, and then click "Add".**



9. **Click Save.**



10. **On the organization/user setting (tentative) screen, confirm that Updated is displayed for the added users.**



Removing Users from a Tentative Organization

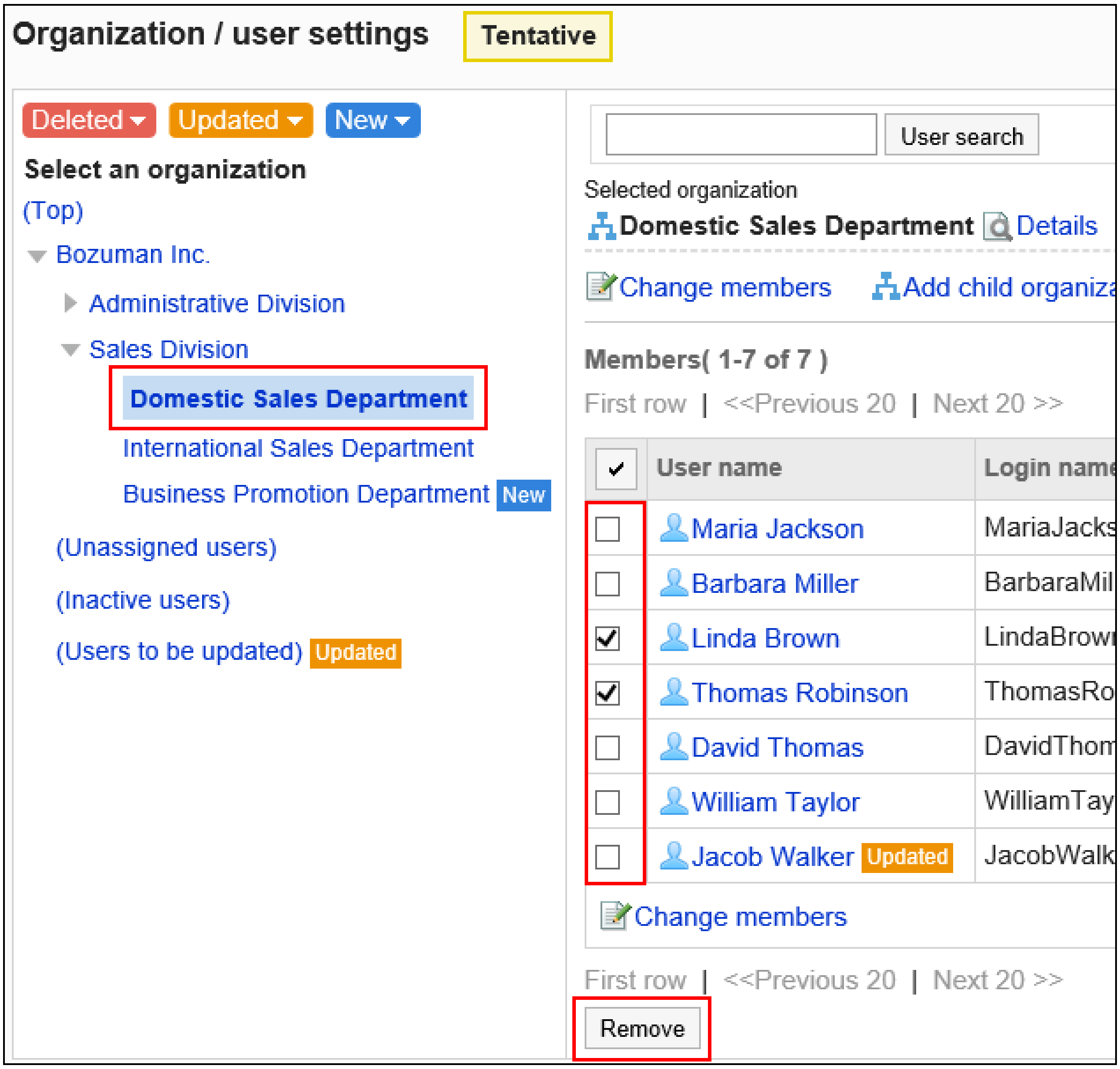
You can remove users from a tentative organization.

The user who are removed from all organizations will automatically be added to the Unassigned users.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the tentative reorganization screen, click organization/user setting.**

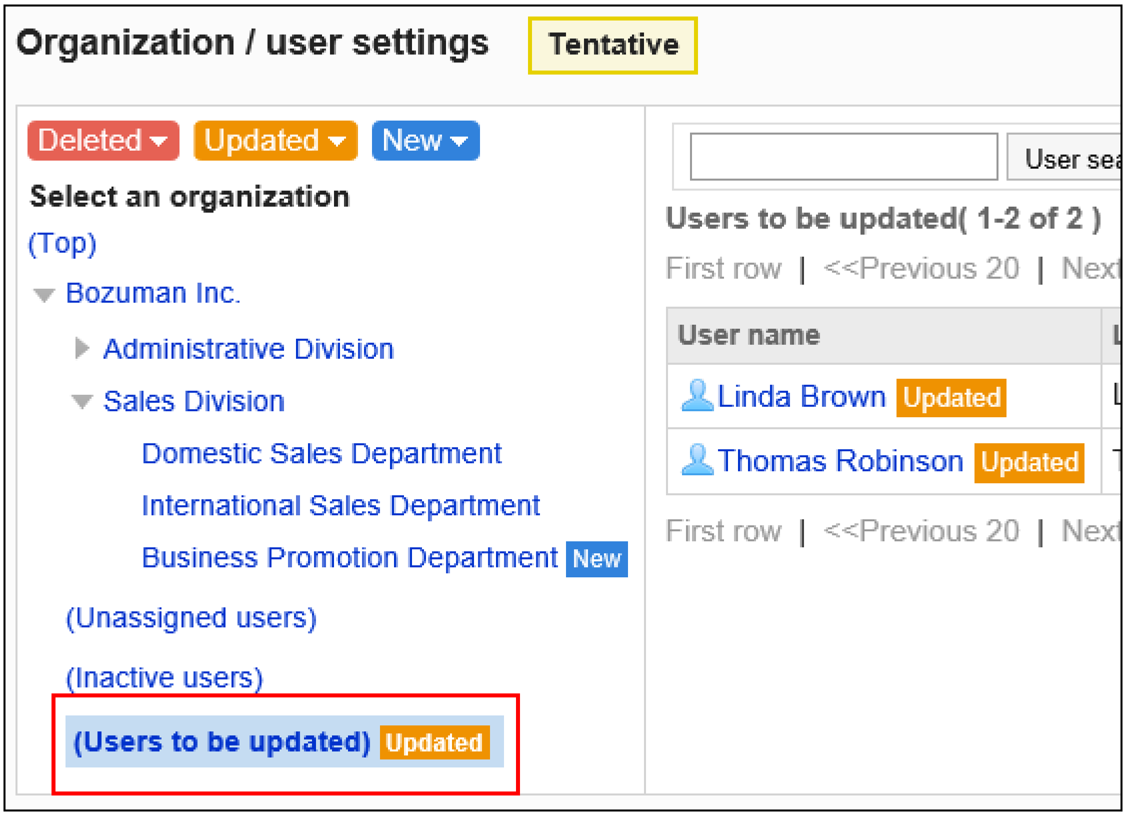
7. **On the organization/user setting (tentative) screen, select an organization, select the check boxes of users you want to remove from the organization, and click Remove.**



8. **Click "Yes" on the screen to delete all users.**

9. **On the organization/user setting (tentative) screen, click "(Users to be updated)".**

10. **Confirm that Updated is displayed for the users you removed in step 7.**

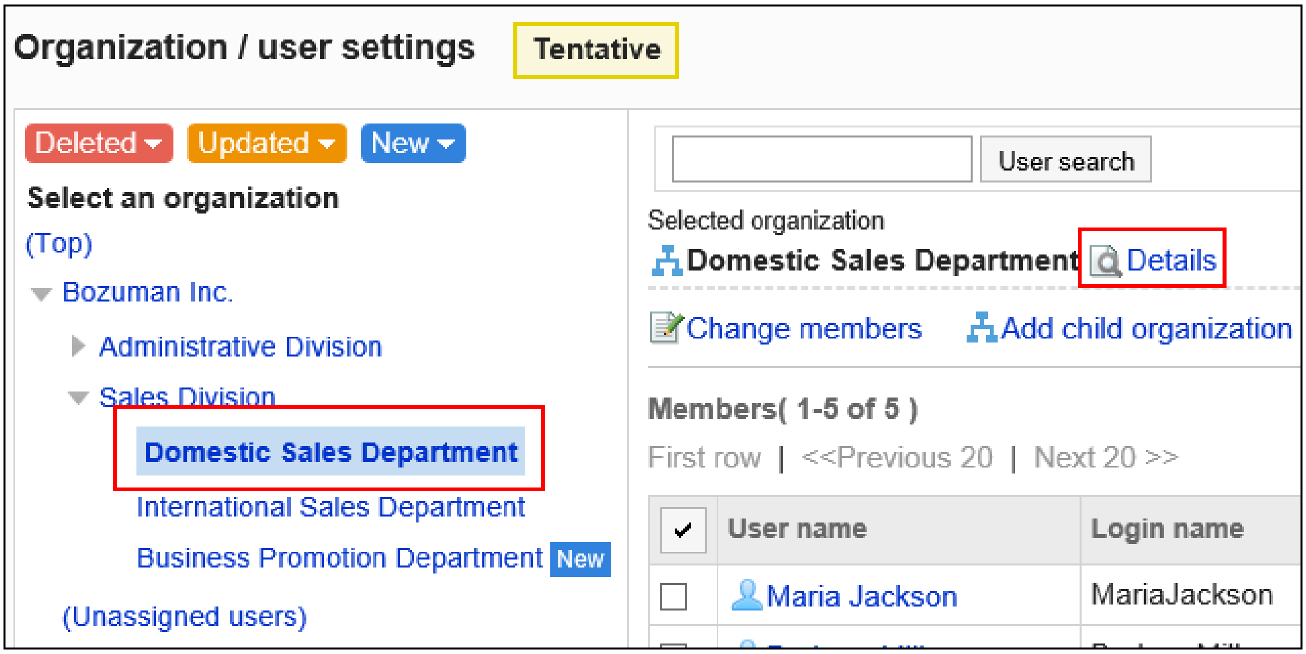


Editing Tentative Organization's Information

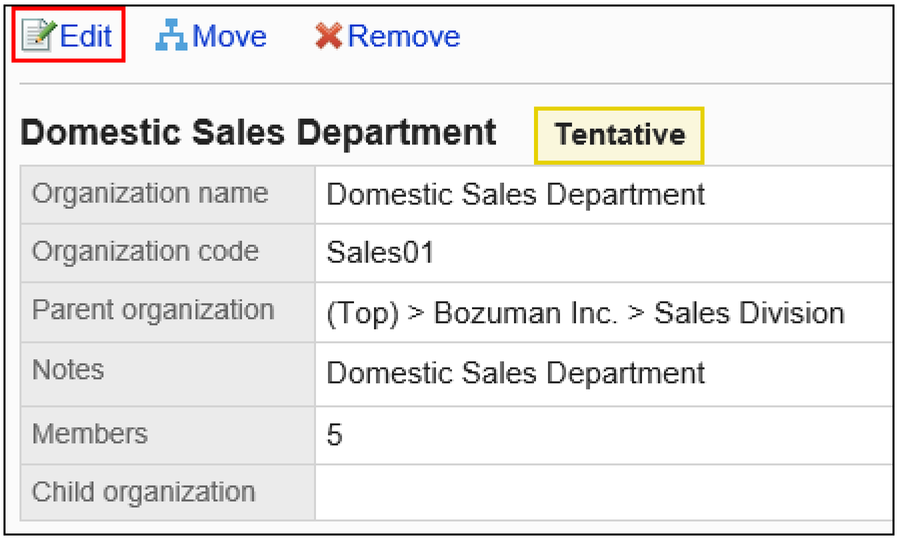
You can change the organization information beforehand.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the tentative reorganization screen, click organization/user setting.**
7. **On the organization/user setting (tentative) screen, select an organization, and then click "Details".**



8. **On the organization details (tentative) screen, click "Edit".**



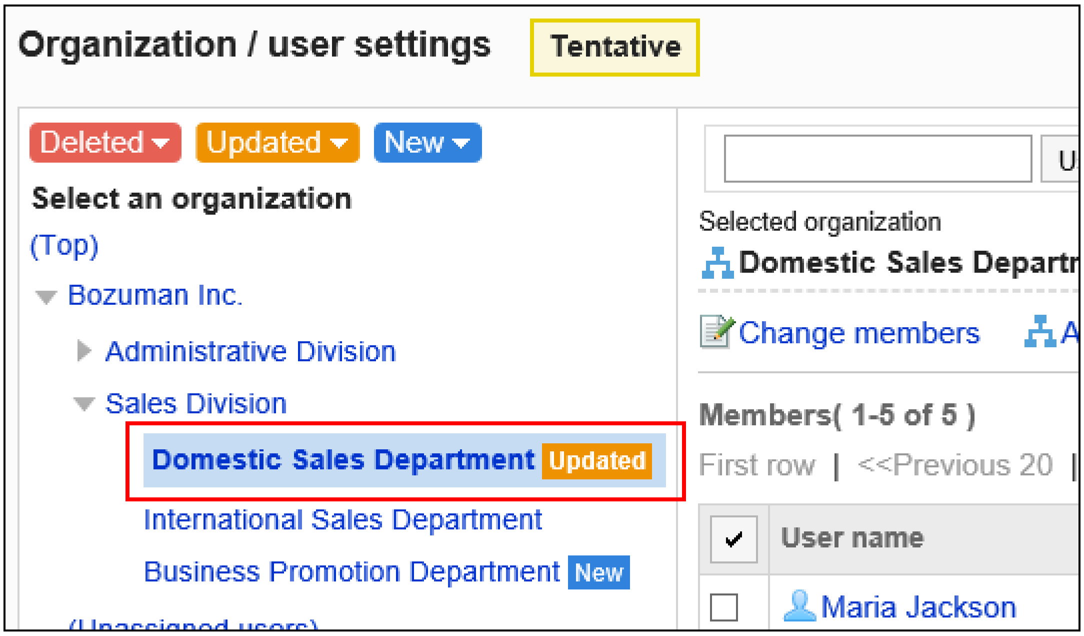
9. **On the screen to change organization information (tentative), set the required items.**

For details, see the items for setting organizations(57Page).

10. **Confirm your settings and click "Save".**

11. **Click "Organization/user settings (tentative)".**

12. **On the organization/user setting (tentative) screen, confirm that Updated is displayed for the organization of which information you have changed.**



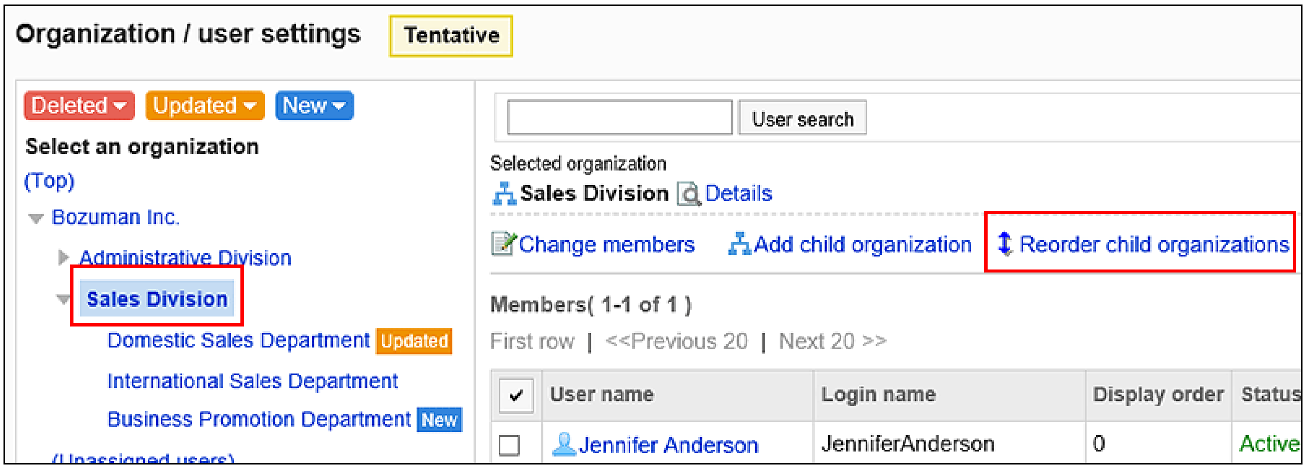
Reordering Organizations

You can change the order of the organizations beforehand.

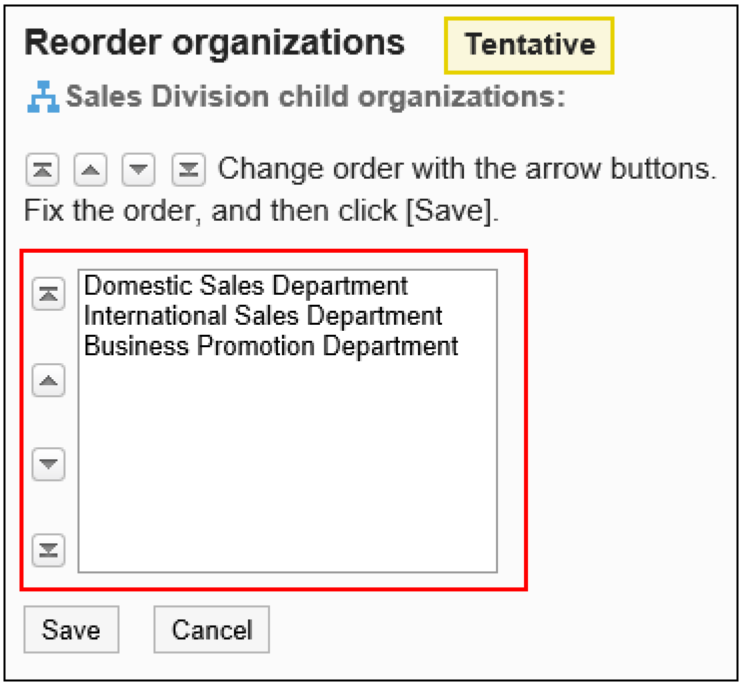
Even if you change the order, Updated does not appear on the organization/user setting (tentative) page.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the tentative reorganization screen, click organization/user setting.**
7. **On the organization/user setting (tentative) screen, select "Top" or an organization, then click "Reorder child organizations".**



8. **On the screen to reorder organizations (tentative reordering), reorder child organizations.**



9. **Confirm your settings and click "Save".**

Removing Organizations

Remove organizations from the tentative structure.

Caution

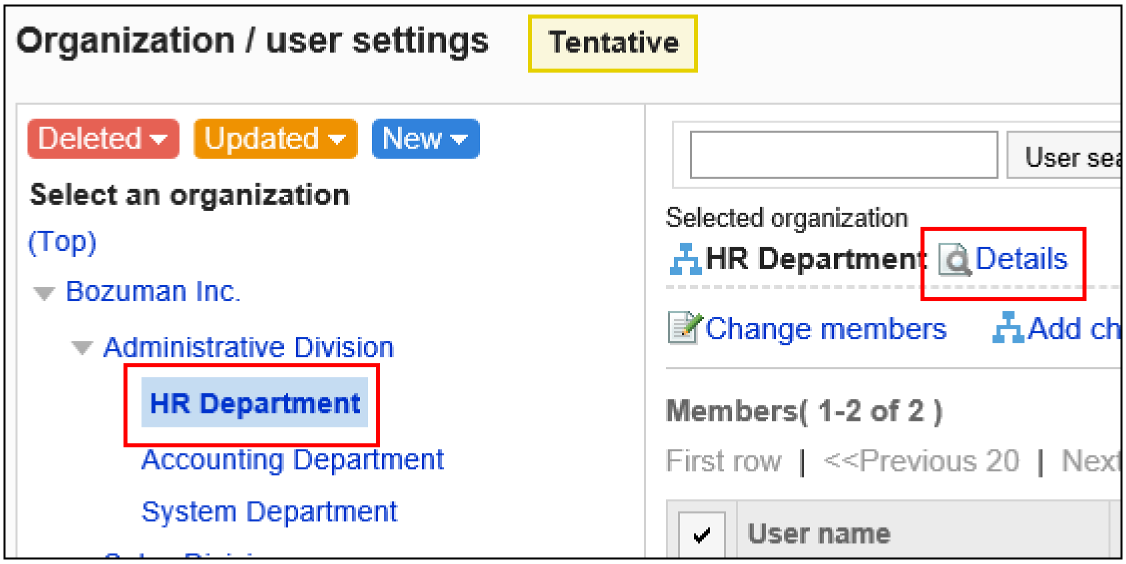
- If you remove an organization in the tentative structure, its child organizations will also be removed.
- Organizations removed by applying a tentative structure cannot be restored.
- You cannot cancel only the removal setting in the tentative structure.
  If you want to cancel the removal setting in the tentative structure, you need to delete the tentative structure

itself, and then recreate a tentative structure again.
For information on how to delete a tentative structure, see the "Deleting a Tentative Structure(134Page)" section.

- Depending on the access permission settings, data that has been restricted for viewing may be exposed when a tentative structure is applied to the current organization.
- Access permissions that have been set for the organization will be cancelled if you apply the tentative structure to the current environment.

Steps:

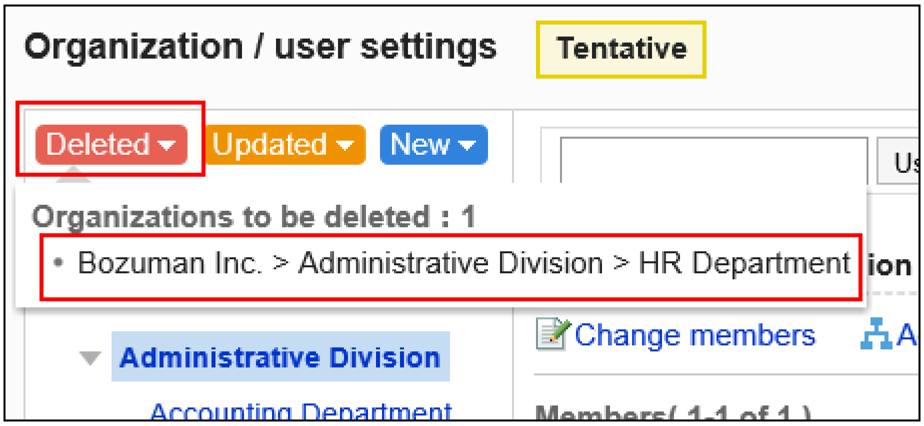
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the tentative reorganization screen, click organization/user setting.**
7. **On the organization/user setting (tentative) screen, select an organization, and then click "Details".**



8. **On the Organization details (Tentative) screen, click Remove.**

9. **Click "Yes" on the screen to delete organization (tentative structure).**

10. Deleted **Click , and then confirm that the organization you have deleted is displayed.**



Editing User Details

To edit the following information of the registered users:

- Office
- Organization membership
- Priority organization
- Display order
- Status

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

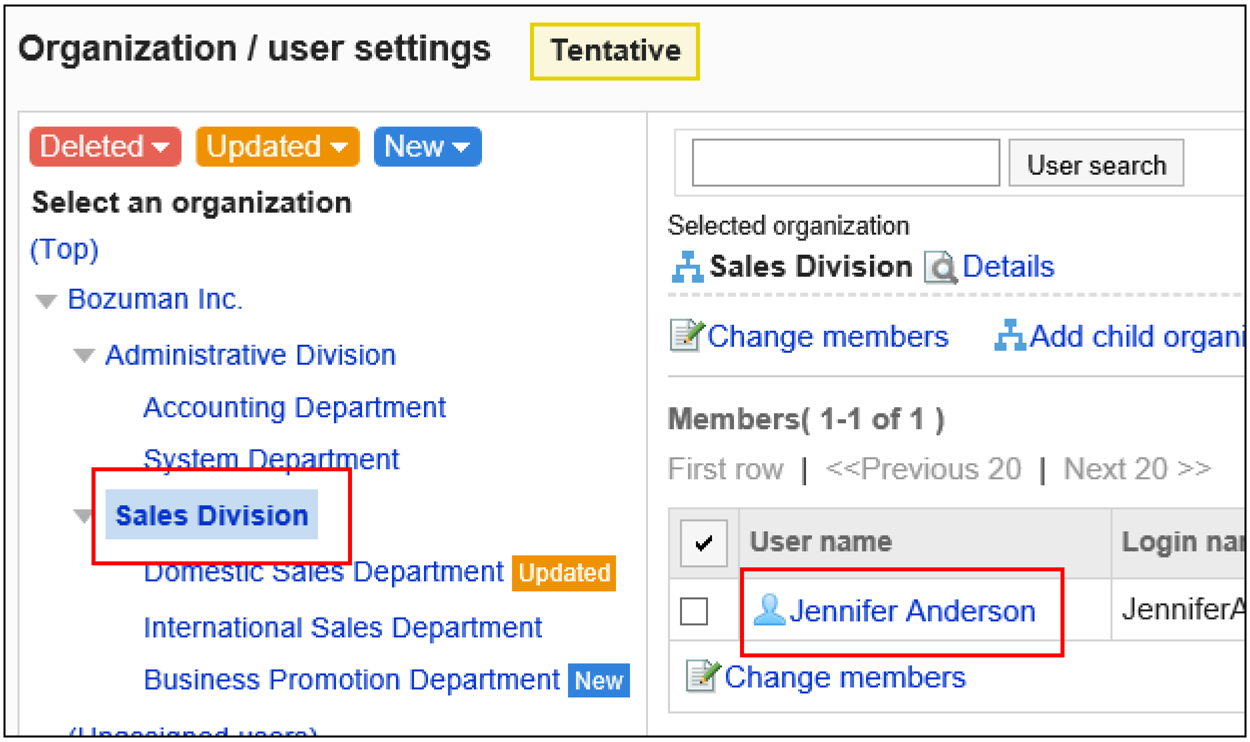
3. **Select "Basic system administration" tab.**

4. **Click Users.**

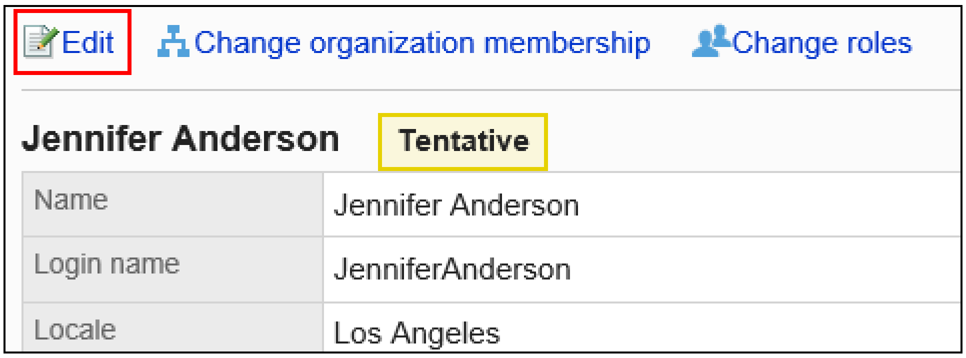
5. **Click Tentative reorganization.**

6. **On the tentative reorganization screen, click organization/user setting.**

7. **On the organization/user setting (tentative) screen, select an organization, and then click the user name of the user whose user profile you want to change.**

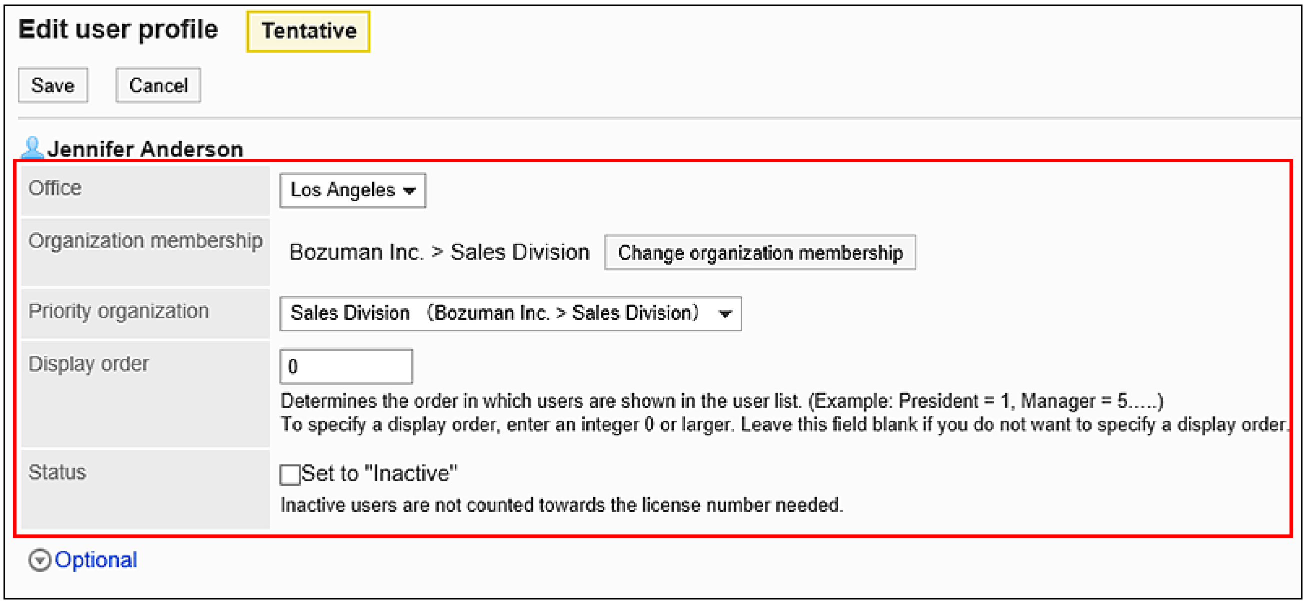


8. **On the User details (Tentative) screen, click Edit.**



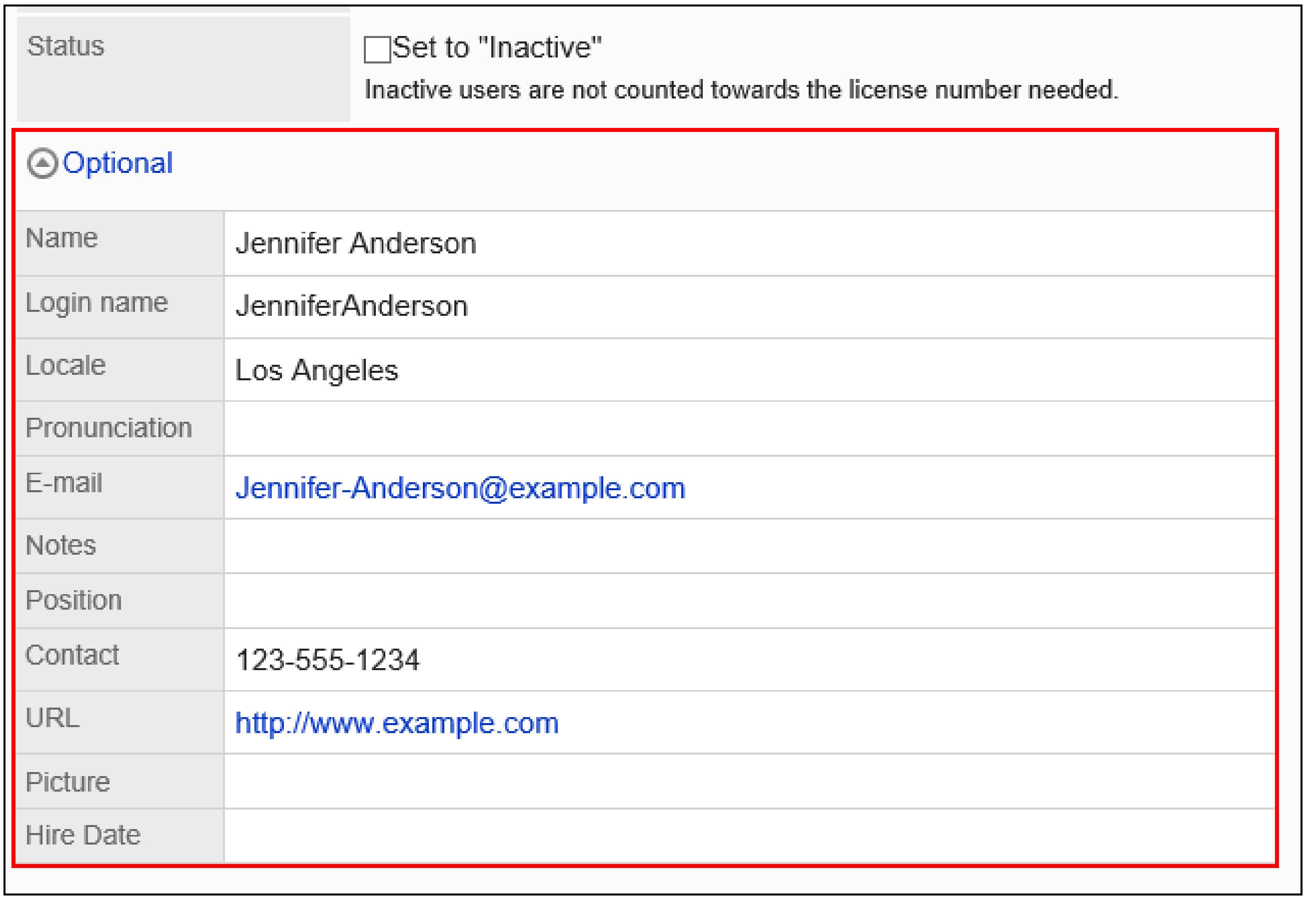
9. **On the screen to change user profile (tentative), set the required items.**

For details, see user setting items(70Page).



Select a priority organization when you want assign the user to multiple organizations.

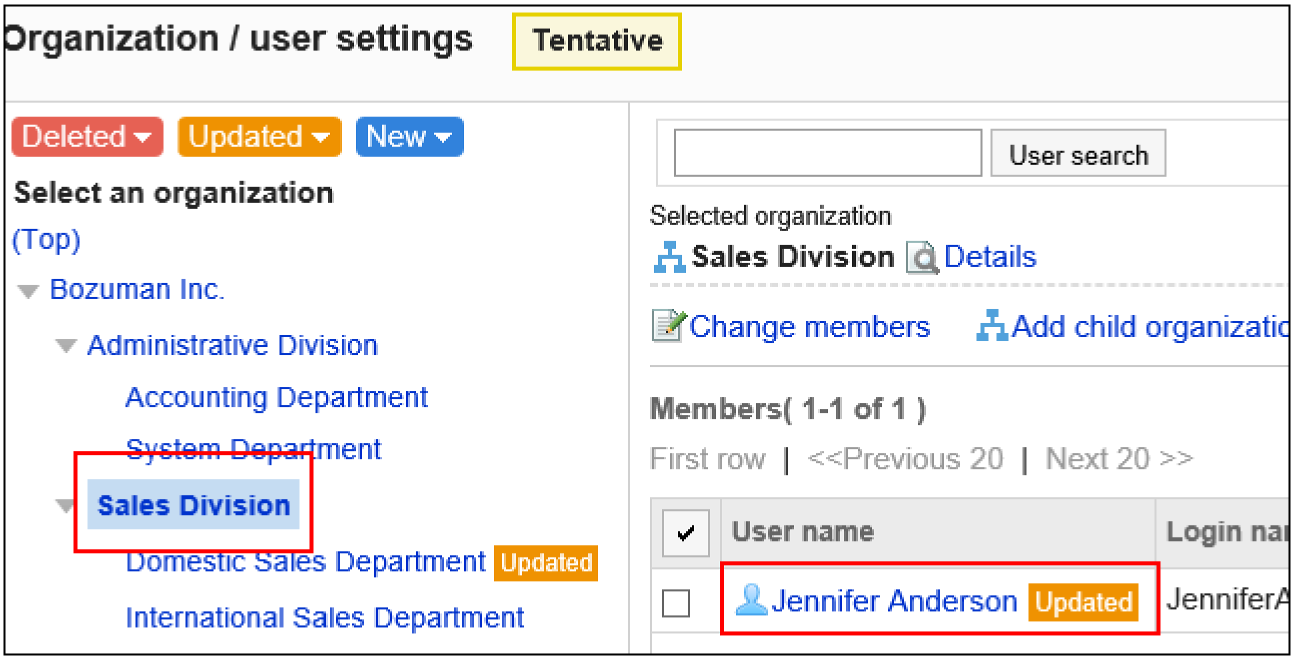
Click Optional to check options that you cannot change in the tentative structure.



10. **Confirm your settings and click "Save".**

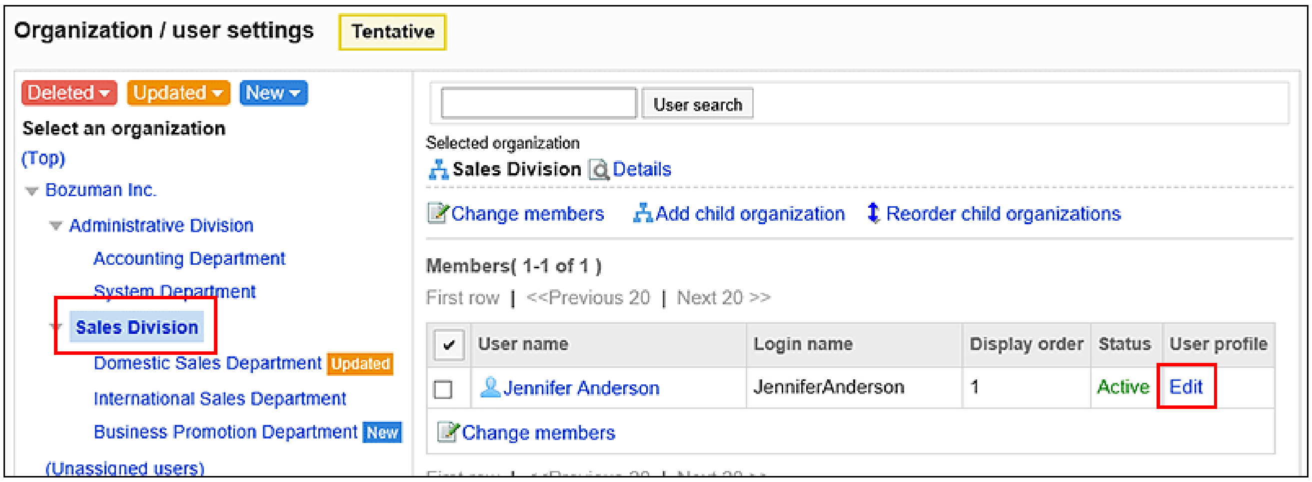
11. **Click "Organization/user settings (tentative)".**

12. On the organization/user setting (tentative) screen, confirm that Updated is displayed for the user whose profile you have changed.



Note

- On the organization/user setting screen (tentative), you can also change the user profile by selecting an organization and clicking "Change" for the user profile of which organization membership you want to change.

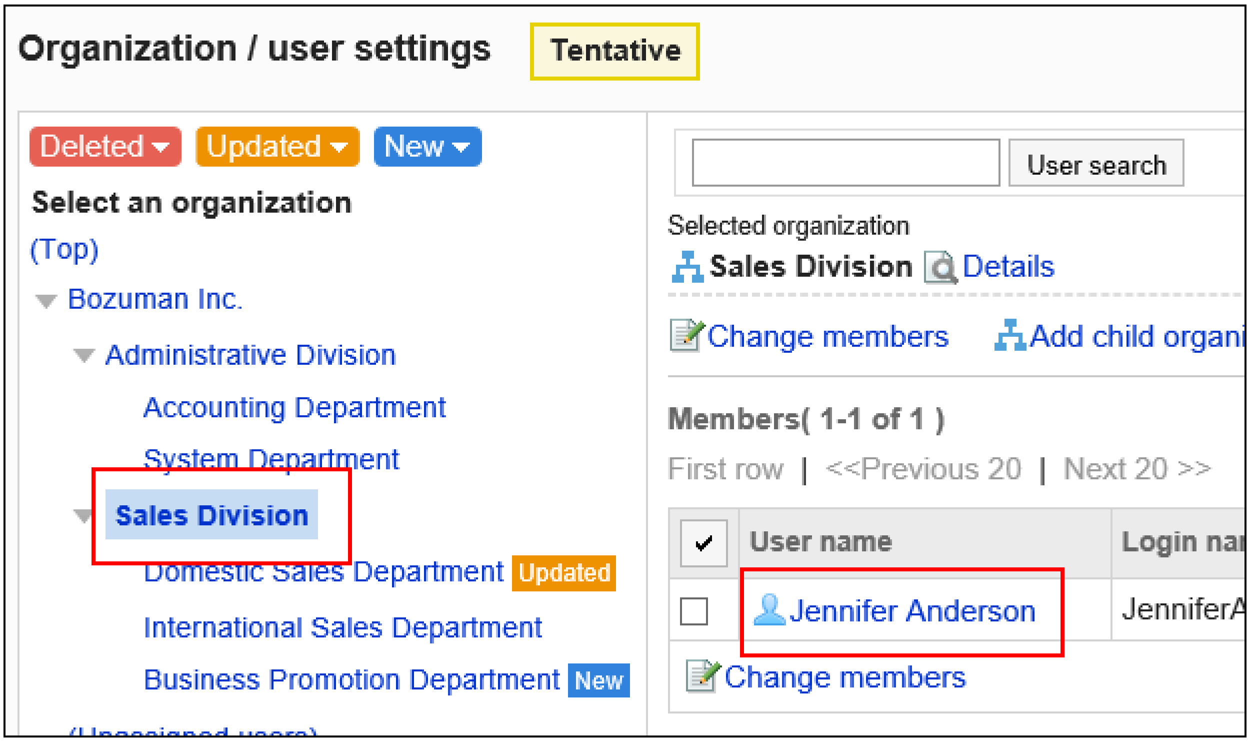


Changing Organization Membership

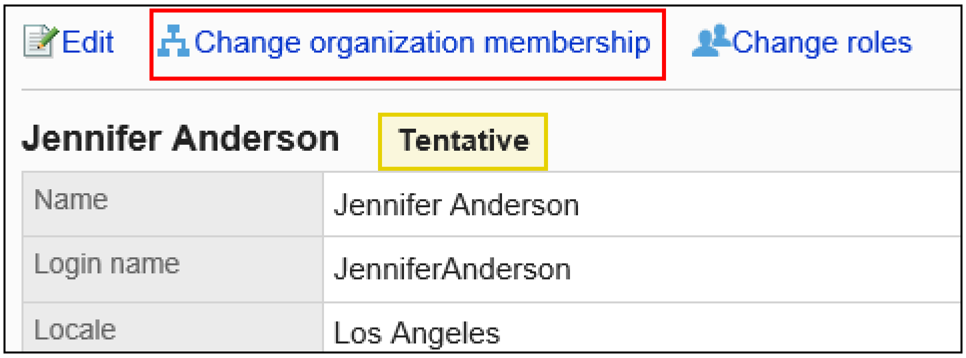
You can change the organization membership of a user in the tentative structure.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the tentative reorganization screen, click organization/user setting.**
7. **On the organization/user setting screen (tentative), select an organization, and then click the user name of the user whose organization membership you want to change.**

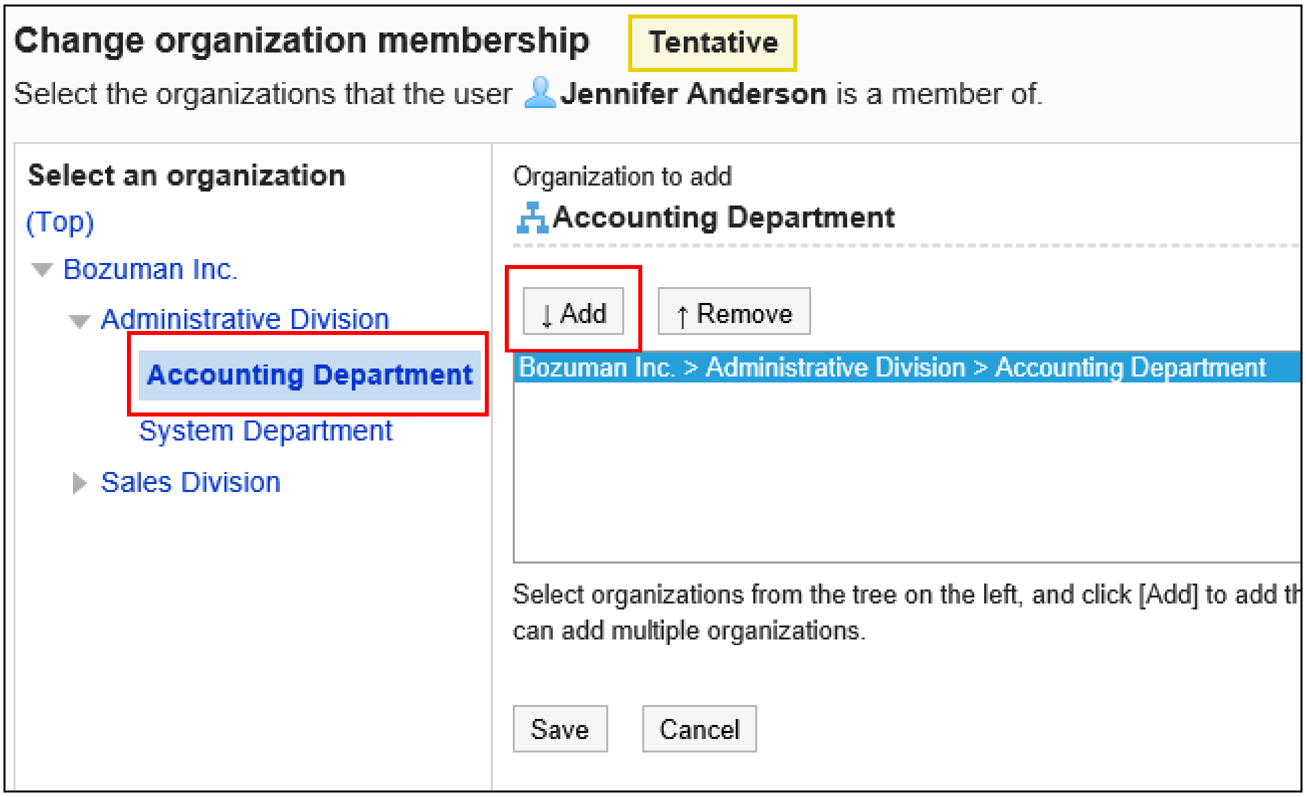


8. **On the User details (Tentative) screen, click Change organization membership.**



9. On the screen to change organization membership (tentative), select an organization, and then click to add the organization.

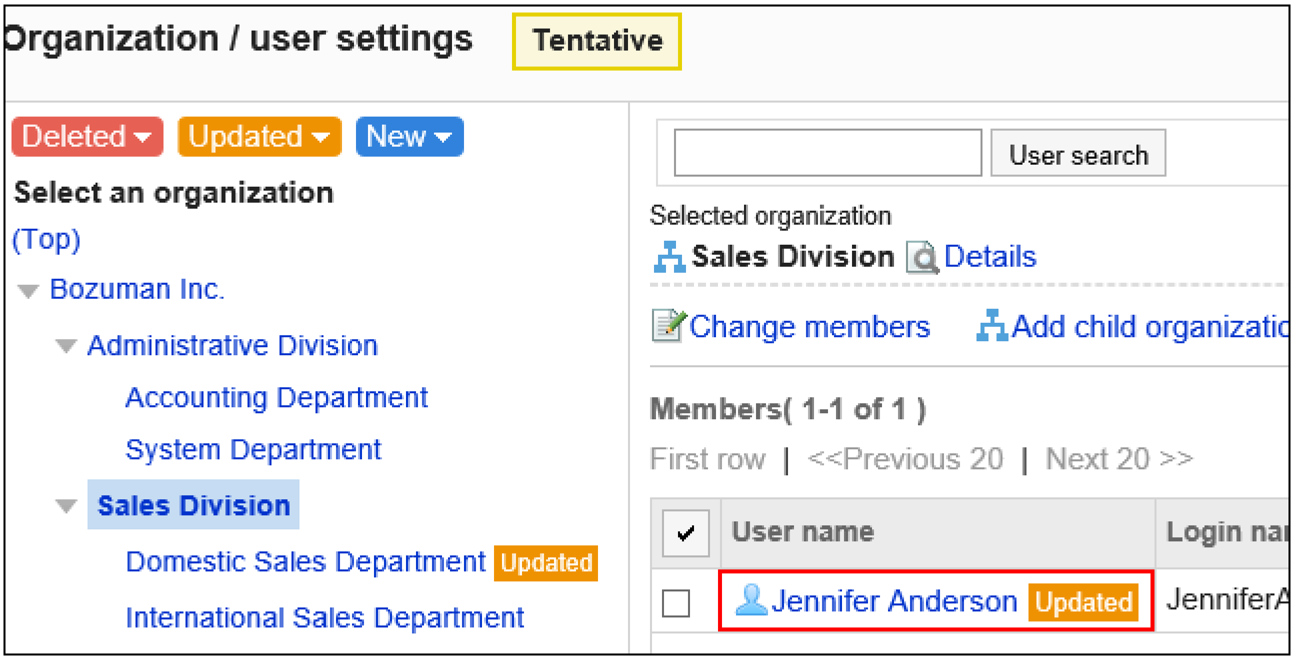
If you want to remove an organization, select the organization you want to remove, and click to remove it.



10. Click Save.

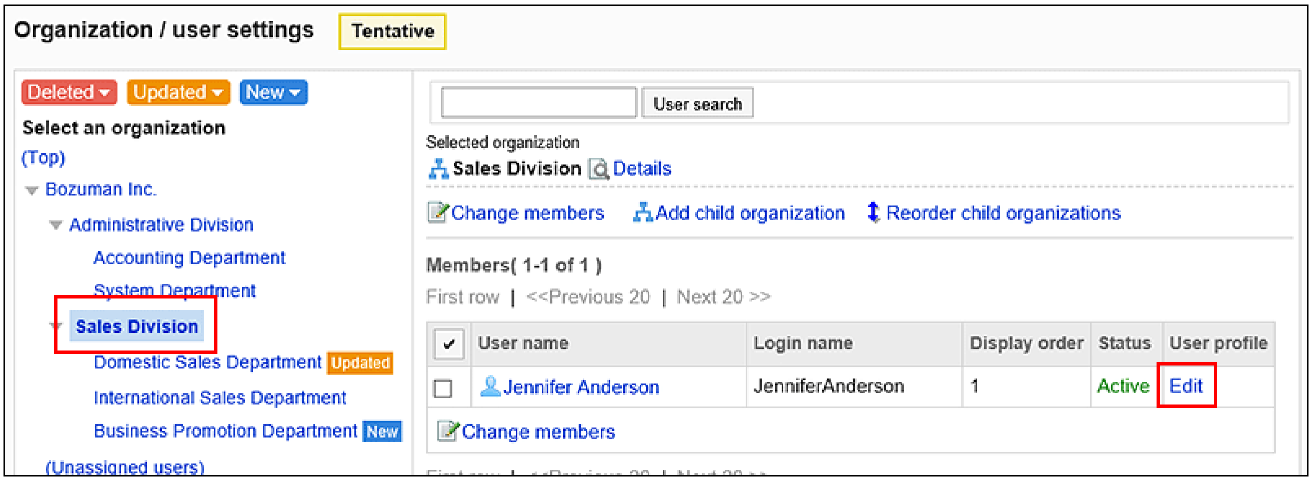
11. Click "Organization/user settings (tentative)".

12. On the organization/user setting (tentative) screen, confirm that Updated is displayed for the user whose organization membership you have changed.



Note

- On the screen to change user profile (tentative), you can also change organizations where users belong to by clicking "Change membership organization" in the "Membership organization" field.



Changing Roles of a User

You can change users' roles in the tentative structure.

For details on roles, see the "What Is a Role?(115Page)" section.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

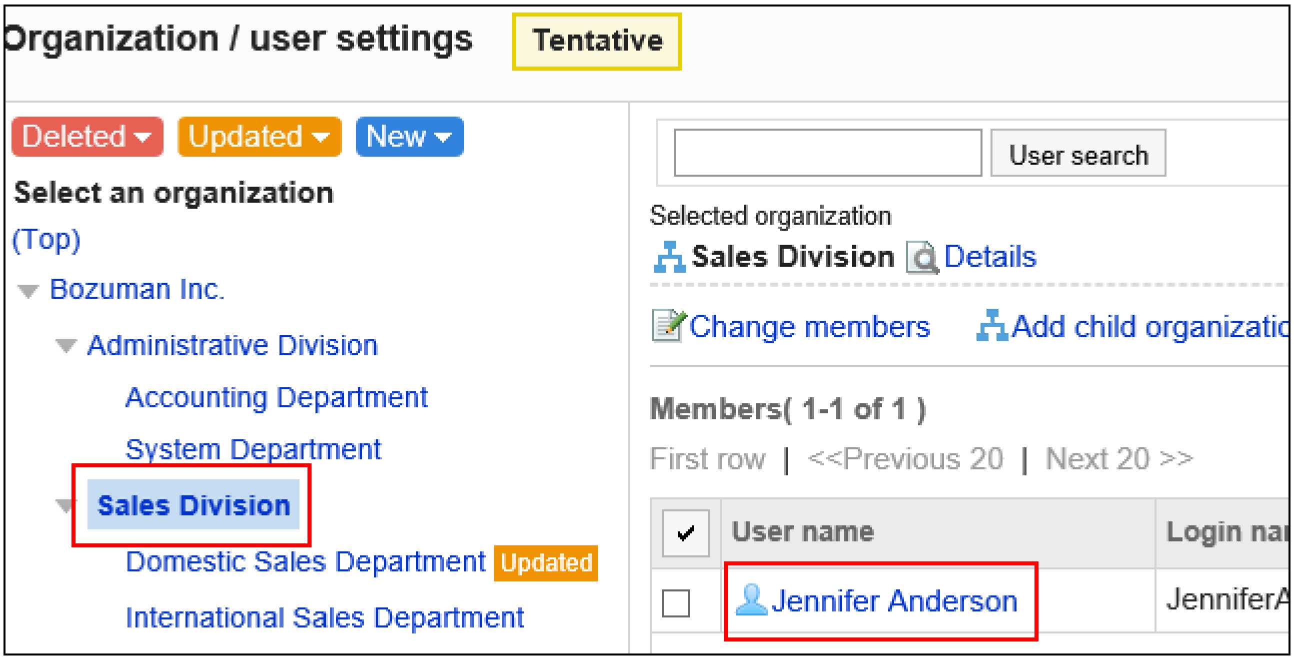
3. **Select "Basic system administration" tab.**

4. **Click Users.**

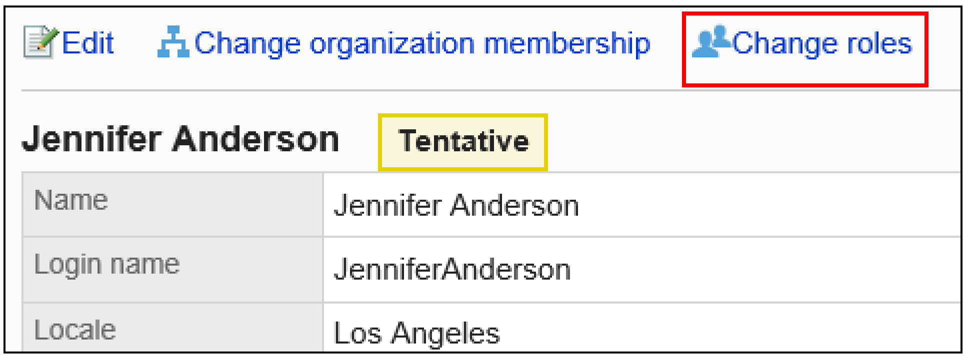
5. **Click Tentative reorganization.**

6. **On the tentative reorganization screen, click organization/user setting.**

7. **On the organization/user setting screen (tentative), select an organization, and then click the user name of the user whose organization membership you want to change.**



8. **On the User details (Tentative) screen, click Change roles.**

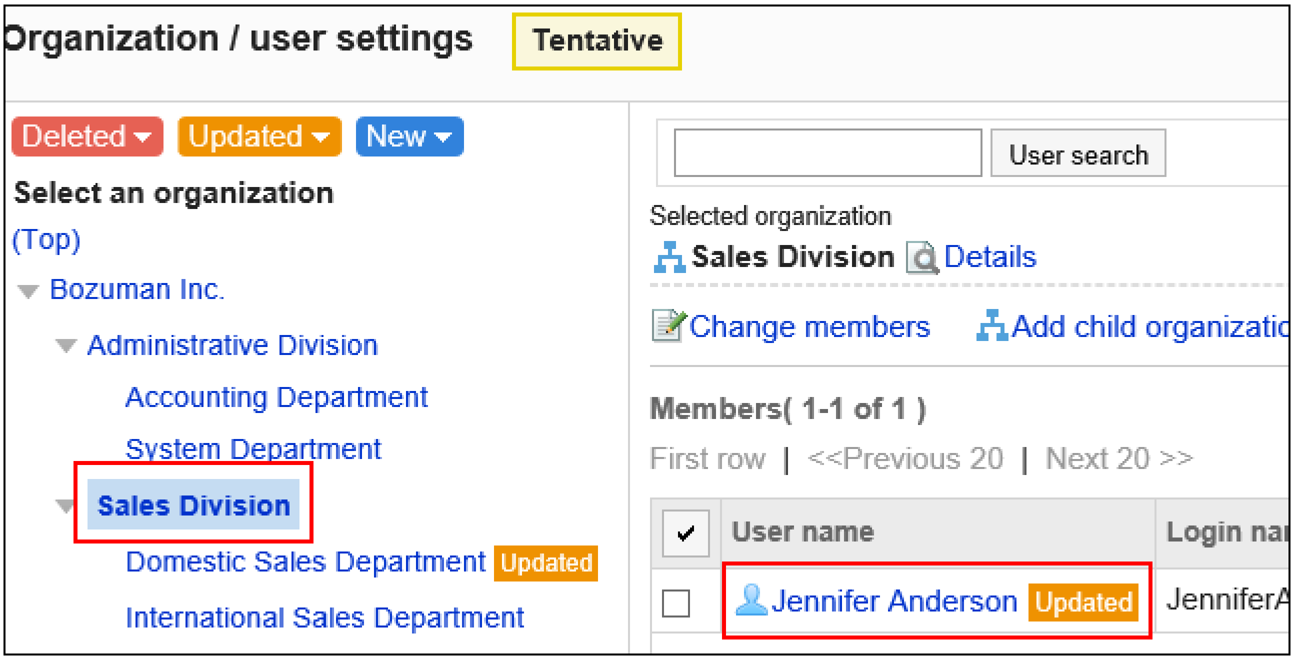


9. **On the Change roles (Tentative) screen, select the check boxes of the desired roles, then click Save.**

Clear the check boxes to remove the roles from the selected user.

10. **Click "Organization/user settings (tentative)".**

11. **On the organization/user setting (tentative) screen, confirm that Updated is displayed for the user whose role you have changed.**



1.3.4.6. Applying Tentative Structure

Apply the tentative structure to the current environment.

You can select one of the following:

- Applying the tentative structure to the current environment now.

- Applying the tentative structure to the current environment at the specified date and time.
  The system timezon is used.

Caution

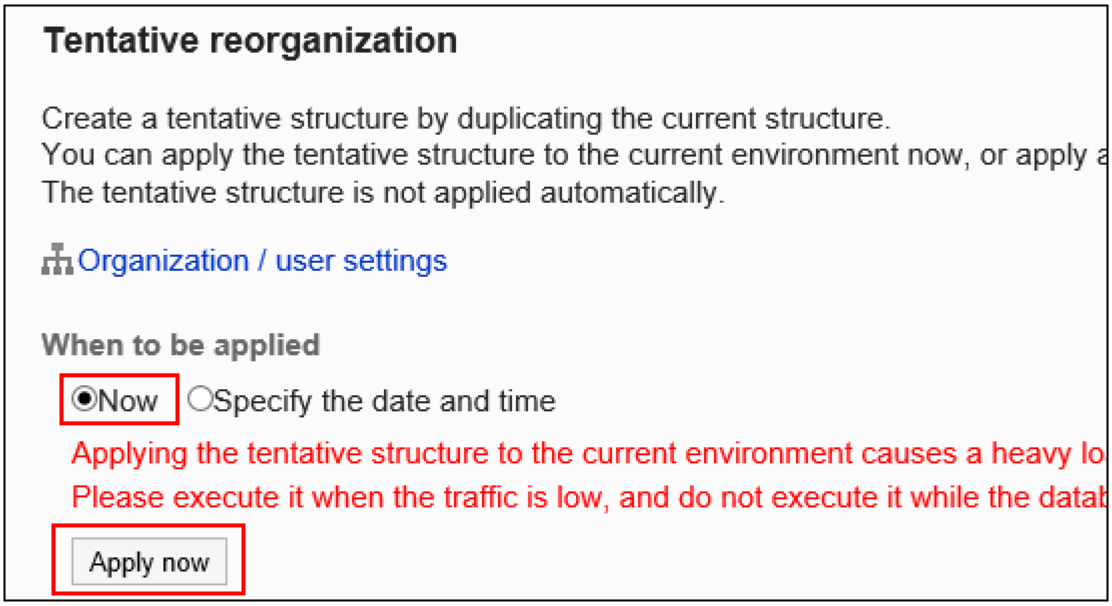
- Applying the tentative structure to the current environment causes a heavy load on the server. We recommend to execute when the traffic is low, and do not execute it while the database is stopped.

Applying the Tentative Structure to the Current Environment Immediately

Apply the tentative structure to the current environment immediately.
Before applying the tentative structure, make sure that it will not cause any problem to the current environment.

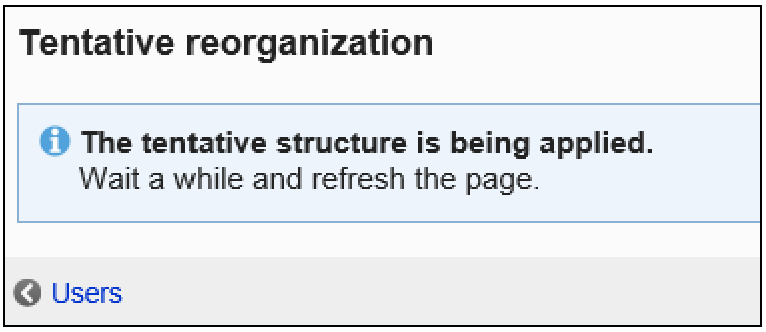
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click Users.**
5. **Click Tentative reorganization.**
6. **On the Tentative reorganization screen, select Now, then click Apply now.**



7. Click "Yes" on the screen to apply the structure to the current environment.

The tentative structure is applied to the current environment. Is displayed.



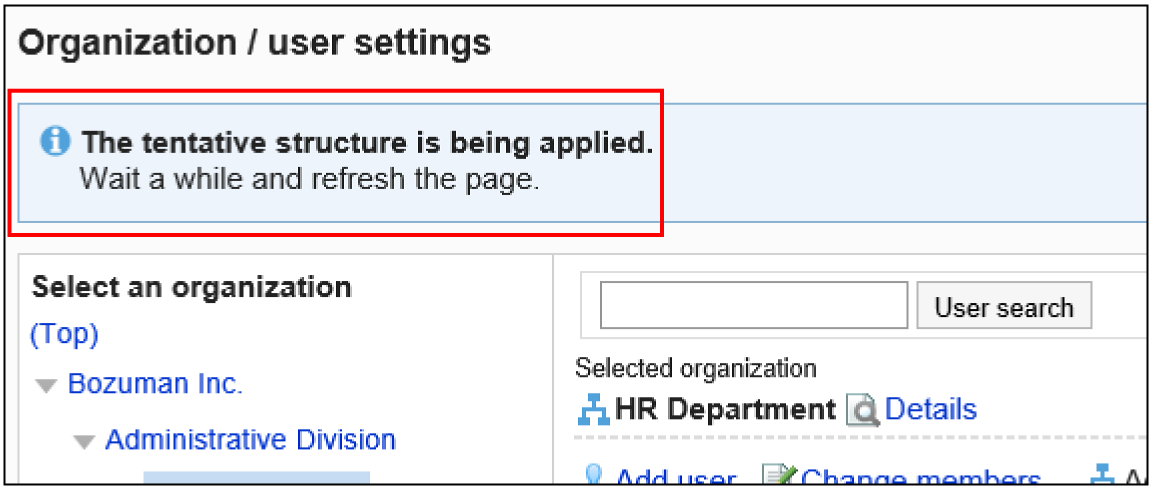
8. Click "Users".

9. Click Organization / user settings.

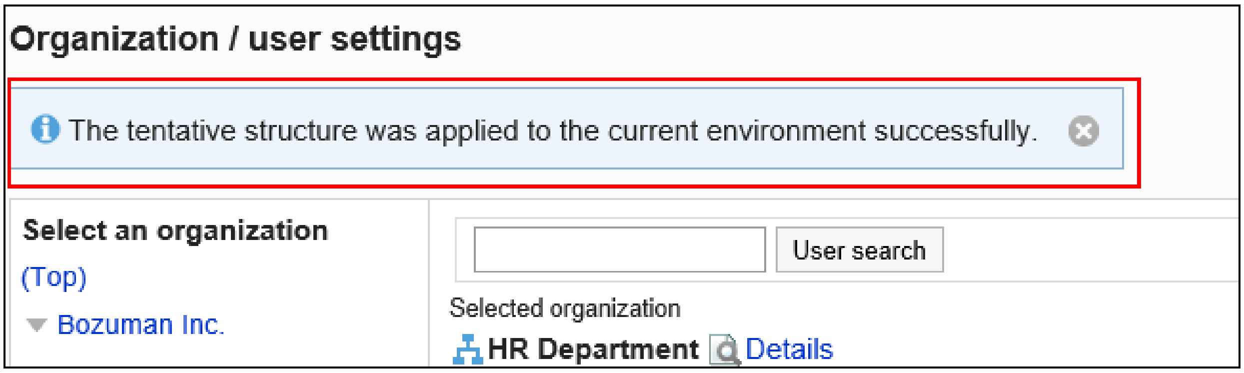
10. On the organization/user setting screen, confirm that the tentative structure is applied to the current environment.

- **If a message stating that the system is now applying the tentative structure to the current operational environment appears**:

  Wait a while and refresh the page.



- **If a message stating that the tentative structure has been applied to the operational environment appears**:
  Process to apply the tentative structure is completed.



Note

- The message can be closed by clicking the icon .
  When a system administration closes the message window, the windows never appear in other system administrators screen.

Applying the Tentative Structure to the Current Environment at the Specified Date and Time

You can apply the tentative structure to the current environment when the process does not affect business operations. For example, apply it during the restructuring of organizations.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

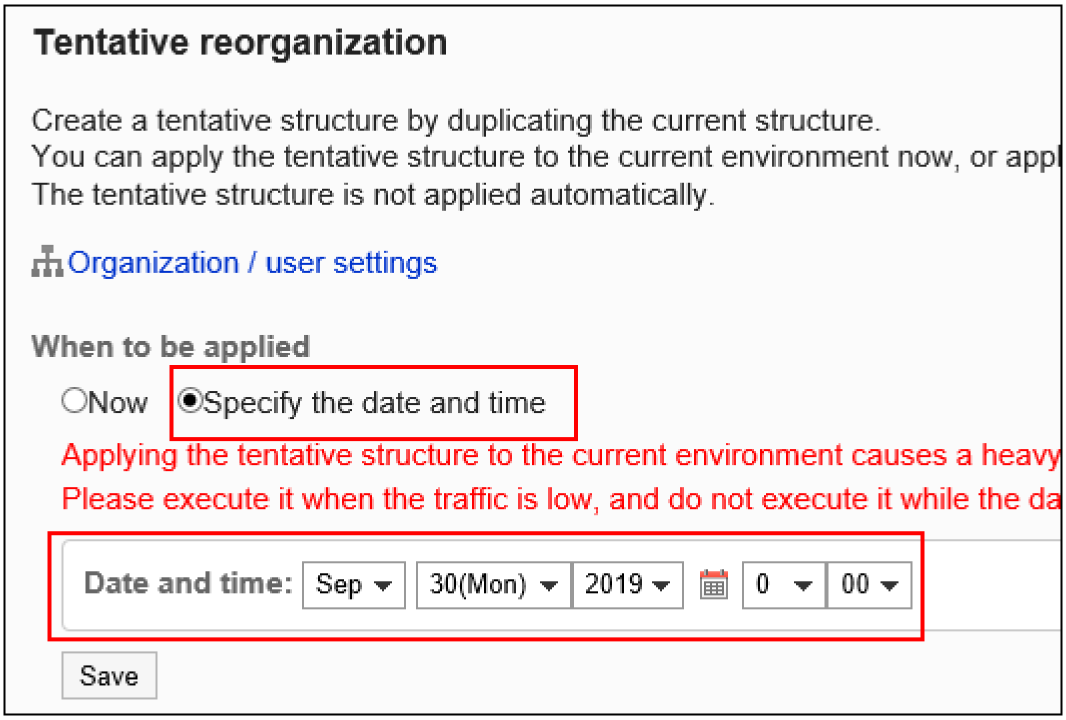
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click Users.**

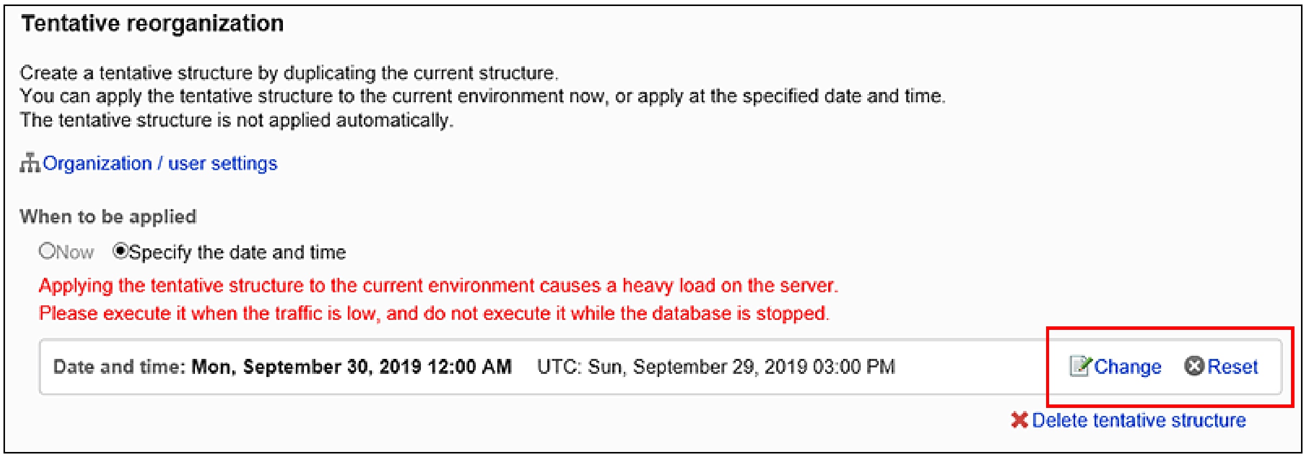
5. **Click Tentative reorganization.**

6. **On the Tentative reorganization screen, select Specify the date and time, then specify the date and time when you want to apply the tentative structure to the current environment.**
   You can specify the date and time from the next day to the next month, with 30 minute increments.



7. **Click Save.**

8. **On the screen to apply the structure to the current environment, confirm the date and time, and then click "Yes".**
   On the Tentative reorganization screen, the date and time of the application appears until the application process is completed.
   The date and time of the application can be changed and reset until the application process is completed.
   - To change the date and time of the application, click Change.
   - To reset the date and time of the application, click Reset.

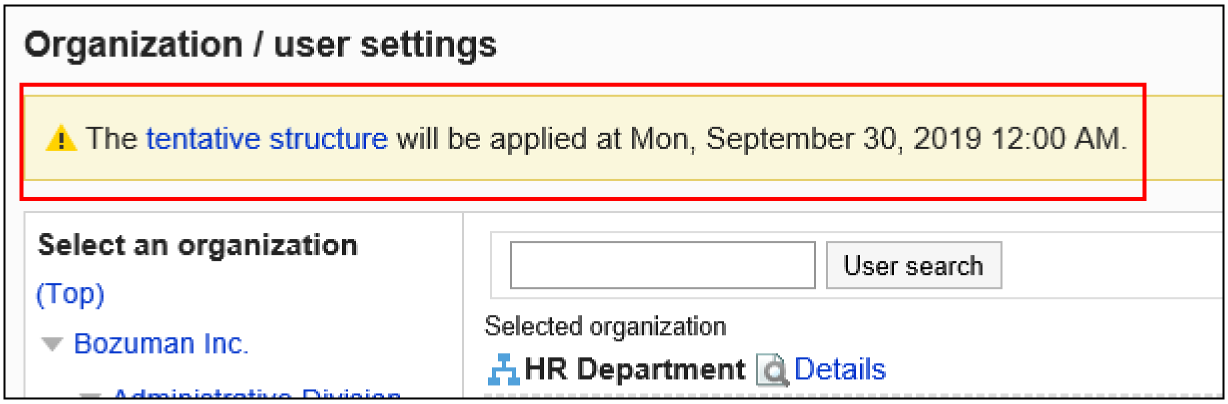


9. **Click "Users".**

10. **On the organization/user setting screen, confirm the status.**

- **Before the specified date and time**:

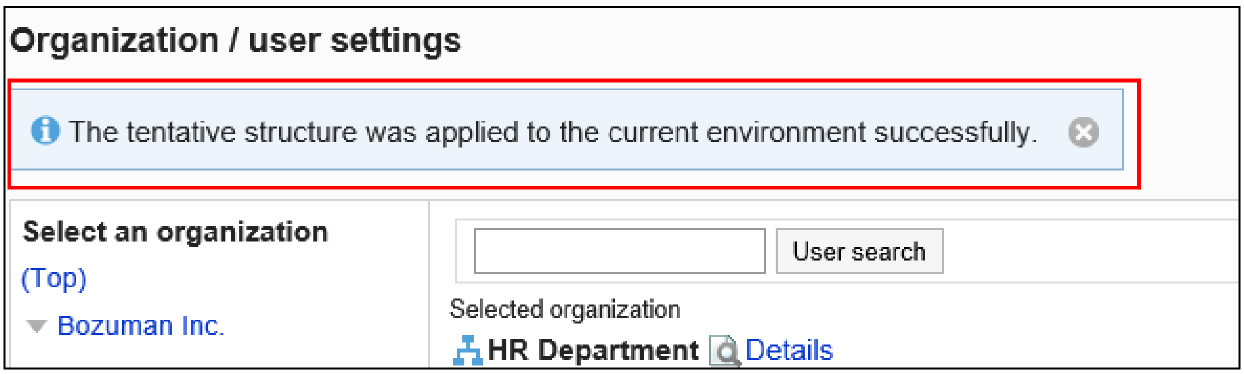
  Displays the date and time when the tentative structure will be applied to the current environment.



- **After the specified date and time**:

  The tentative structure is applied to the current environment. If the message is displayed, wait a while, and then reload the page.

  When the "The tentative structure was applied to the current environment successfully." If this message is displayed, the process to apply the tentative structure is completed.



Note

- The message can be closed by clicking the icon .
  When a system administration closes the message window, the windows never appear in other system administrators screen.

If the Process Has Failed to Apply the Tentative Structure

When the application of the tentative structure to the current environment has failed, an error message with an error code appears.
The tentative structure remains unapplied.
Follow the displayed message, change the settings and apply the tentative structure to the current environment again.

1.3.5. Managing Organizations, Users, and Roles Using CSV Files

You can manage data for users, organizations, and roles in CSV files.
The following data can be managed using CSV files:

- Organization
  - Organization details
  - Organization member data
  - Organization name data
- Users
  - User profile
  - Membership information data
  - Role data by user
- Role
  - Role details
  - User data by role

Importing Data from a CSV File

You can import organization, user, and role data from CSV files.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Caution

- In Garoon, only the organization information imported from CSV files will be overwritten without being appended. Therefore, when you import organization information from a CSV file, if an existing organization is not listed in the "Current Organization Codes" in the CSV file, that organization will be deleted. If you want to import organization information from a CSV file, all organization information must be listed in the CSV file.

Note

- If any tentative structure exists without applying to the current environment, the following data cannot be imported from a CSV file.
    - Organization details
    - Organization name data

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed in CSV files, see the "Organizations/Users/Roles(1804Page)" section.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click Users.**

6. **Click "Import from CSV file".**

7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. Set the data to import, and click "Next".

The setting fields are as follows:

- Character encoding:

  Encodes data from a CSV file with the selected character code.

  The following character encoding can be selected:

  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Skip the first row:

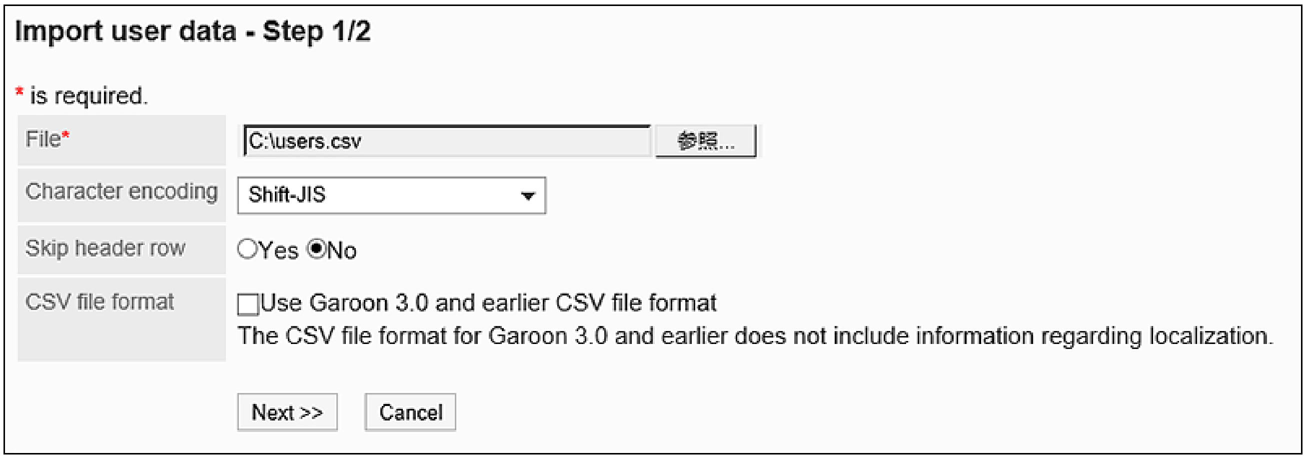
  If the header row contains information other than the data such as an item name and a comment, select "Yes".

- CSV File Format:

  This field is displayed when you import user information.

  Select whether to use the version 3.0 or earlier format.

  If you use version 3.0 or earlier, you cannot import information about localization.



10. Confirm the CSV file contents and click Import.

Exporting Data to a CSV File

You can export organization data, user data, and role data to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click Users.

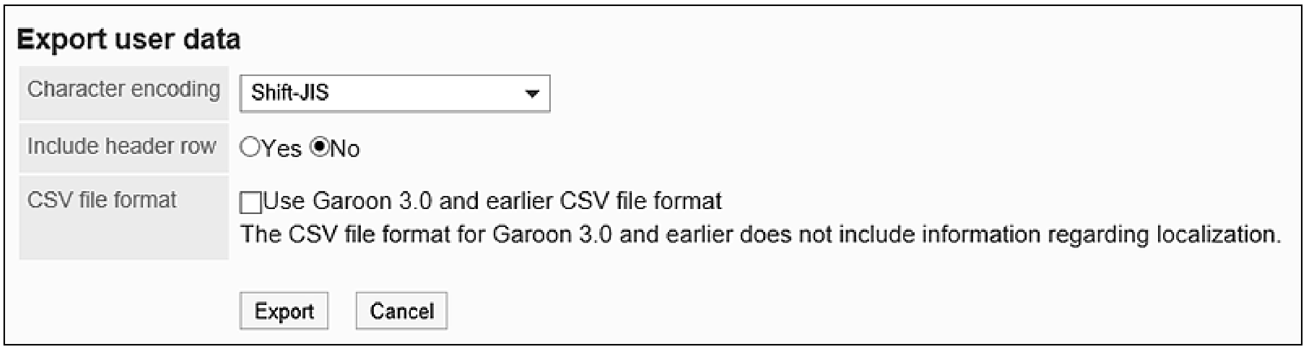
5. Click "Export to CSV file".

6. On the "Export to CSV File" screen, select the data to export.

7. Set the required items for the the data to export.

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  The following character encoding can be selected:
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".
- Language in which the data is exported:
  This field is displayed when you export an organization name.
  Set the language in which you want to export an organization name. You can set multiple languages.
  The following languages can be selected:
  - All
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese
    Exported in Traditional Chinese.
- CSV File Format:
  This field is displayed when you import user information.
  Select whether to use the version 3.0 or earlier format.
  If you use version 3.0 or earlier, you cannot export information about localization.



8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

1.4. Authentication

This section describes authentication for Garoon.

References

- Authentication System(165Page)
- Login Authentication Settings(170Page)
- Session Authentication Settings(178Page)
- Authentication Database Settings(188Page)

1.4.1. About Authentication System

Authentication refers to verifying the validity of a connection target.

In Garoon, authentication is performed at the time of logging in and after logging in.

Login Authentication

Authentication performed at the time of logging in to Garoon is called login authentication.
The authentication types available for login authentication are as follows.

Authentication Type	Description
Standard Authentication	Authenticate using Garoon authentication information. The authentication results are saved in Cookie[1].
Environment Variable Authentication	Authenticate using information set for environment variables. This authentication method is used for many single sign-on products. If you want to set up single sign-on with third-party products, contact the Cybozu official partner. Partners can be searched in the partner list of the product site.

[1]: Cookies issued by Garoon have the following attributes.

- Http-only attribute:
  Prevent the tampering of cookies through script (e.g., JavaScript) from client computers.
- Secure attribute:
  Issue cookies only when HTTPS is used for communications.

Session Authentication

After logging in to Garoon, whenever users perform various actions, session authentication is performed.
The authentication types available for session authentication are as follows.

Authentication Type	Description
Standard Authentication	Authenticate using Garoon authentication information. The authentication results are saved in Cookie[1].
Environment Variable Authentication	Authenticate using information set for environment variables. This authentication method is used for many single sign-on products. If you want to set up single sign-on with third-party products, contact the Cybozu official partner. Partners can be searched in the partner list of the product site.

Authentication Type	Description
Cybozu Common Authentication	Garoon can share authentication information with other Cybozu products such as Office series, Dezie, and Mailwise. The authentication results are saved in Cookie[1].
Open Integrated Authentication ver. 2	Garoon can share authentication information with other Cybozu products (Office series, Dezie, Mailwise, etc.) and third-party products. The authentication results are saved in Cookie[1]. For the following items, set identical values as those of the product being connected. • Cookie name • Integrated authentication password • Integrated authentication password (for confirmation) • Publishing domains
Open Integrated Authentication ver.1	Garoon can share authentication information with third-party products. The authentication results are saved in Cookie[1]. For the following items, set identical values as those of the product being connected. • Integrated authentication password • Integrated authentication password (for confirmation) • Cookie issuing domain • Cookie issuance path

[1]: Cookies issued by Garoon have the following attributes.

- Http-only attribute:
  Prevent the tampering of cookies through script (e.g., JavaScript) from client computers.
- Secure attribute:
  Issue cookies only when HTTPS is used for communications.

Caution

- As a security measure, we recommend that you specify only the required range of Cookie issuance paths, which are set in the Open Integrated Authentication ver.1.

Note

- The Open Integrated Authentication ver. 2 is more secure than the Cybozu Common Authentication and the Open Integrated Authentication ver.1. If product that shares authentication information with Garoon supports

the Open Integrated Authentication ver. 2, it is recommended to use the Open Integrated Authentication ver. 2 in Garoon as well.
- If you have set open integrated authentication in Garoon version 2.5.2 or earlier, the Open Integrated Authentication ver.1 is automatically set at the time of upgrade.

Authentication Database

Set which database to use when performing login authentication or session authentication.
You can switch which authentication information to refer to, depending on the authentication type.

The following two types of databases can be used for authentication.

- Standard Database:
  This is the default database used for authentication. Authenticates using the Garoon user information.
- Authentication Database:
  You can register an authentication server of your choice. Only LDAP server can be added.

Caution

- When using SSL/TLS to connect to an LDAP server, you must change the OpenLDAP settings on the server where Garoon is installed.
  For details, see the Support Guide for settings required to connect to an LDAP server using SSL/TLS.

Note

- Garoon supports the LDAPv3 protocol.

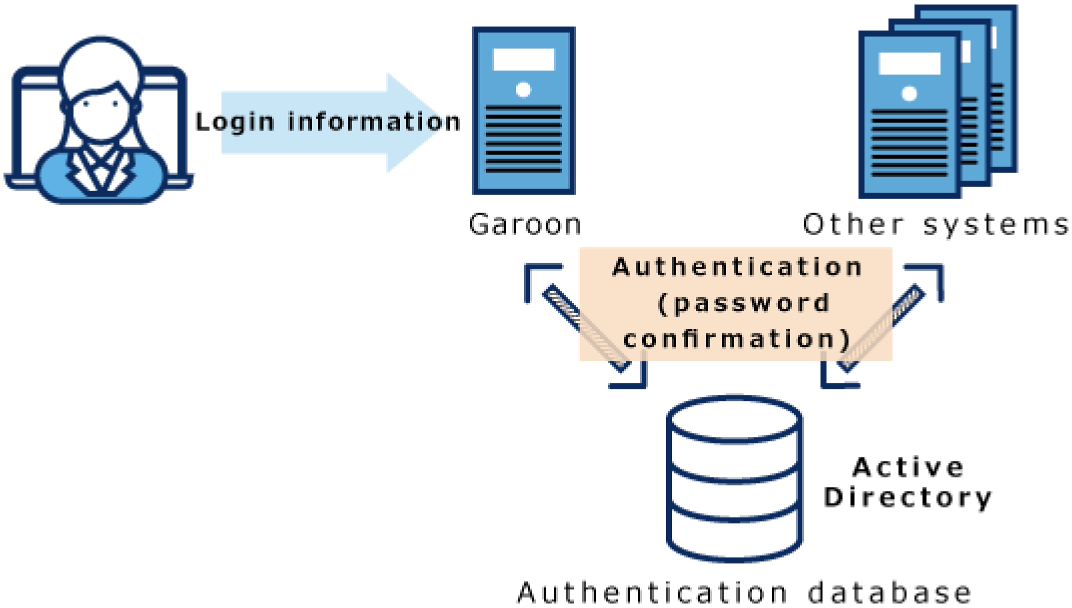
Example of Authentication Settings

By combining login authentication and session authentication, you can configure authentication such as the following

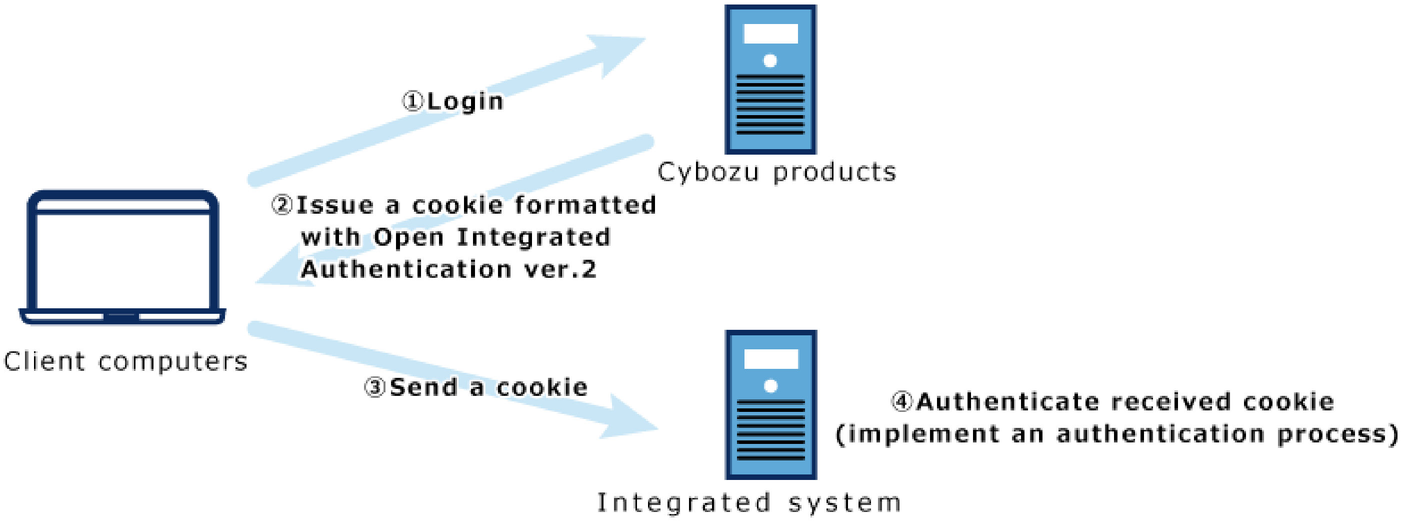
- Login Authentication:
  - Authentication type: Standard Authentication
  - Authentication database: Use an LDAP server
- Session Authentication:

- Authentication type: Open Integrated Authentication ver. 2
- Authentication database: Use an LDAP server

Example of Login Authentication:



Example of Session Authentication:



1.4.2. Setting Up Login Authentication

Set authentication types to use when users log in to Garoon.
Set this if users perform single sign-on to Garoon from other systems, or want to change authentication database only when logging in.

Adding Login Authentications

You can add login authentication.
The authentication types available for login authentication are as follows

- Standard Authentication
- Environment Variable Authentication

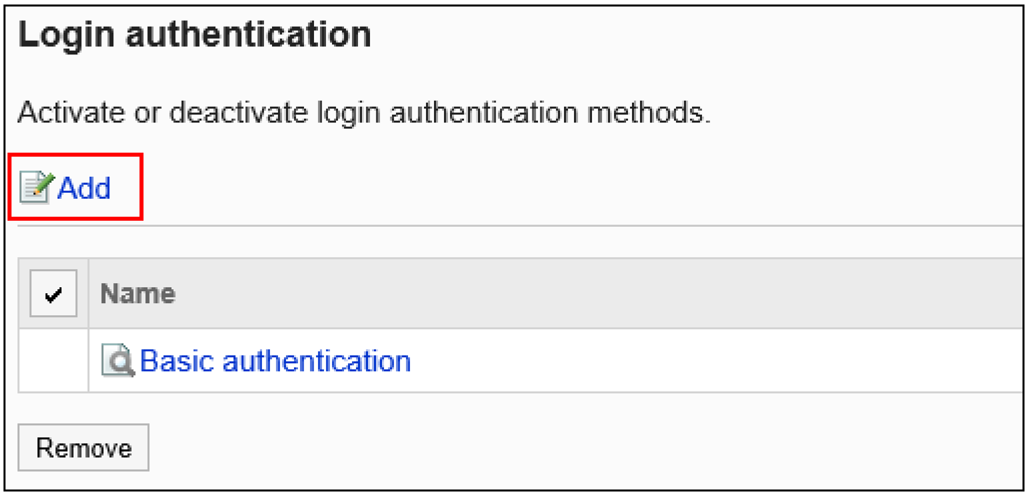
By default, standard authentication is selected.
If you want to use environment variable authentication for log in, add login authentication.
For details on authentication types, see the "Login Authentication(166Page)" section.

Note

- To use LDAP server for authentication, you must configure the Authentication Database Settings(188Page) before you can add or change authentication.

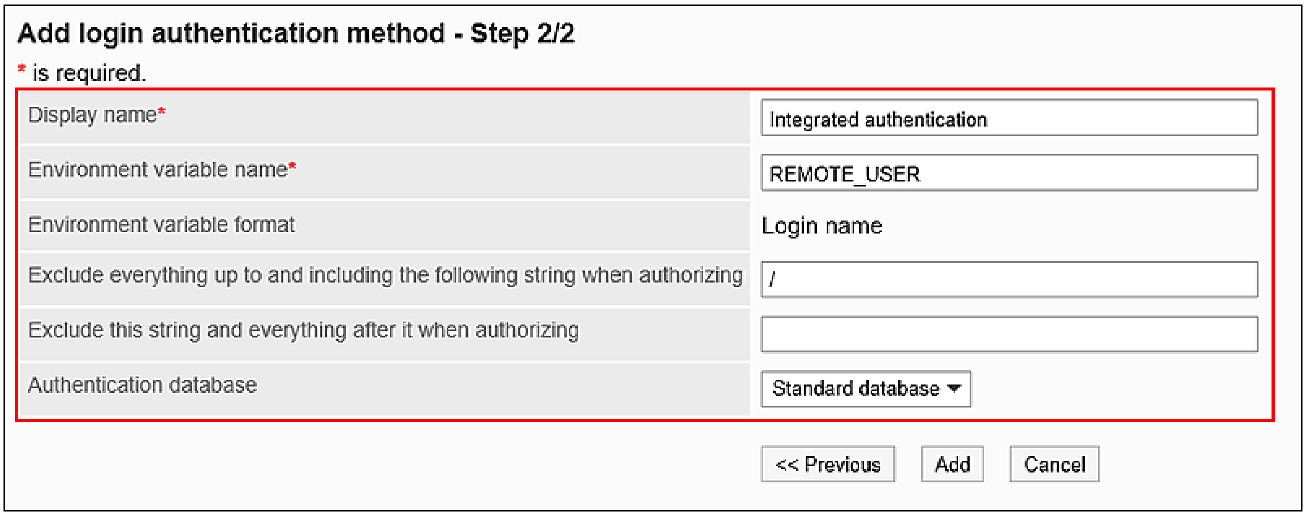
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Login Authentication".**
6. **On the "Login Authentication" screen, click "Add a Login Authentication".**



7. **On the "Add Login Authentication - Step 1/2" screen, check that environment variable authentication has been selected as the login authentication type, and click "Next".**

8. **On the "Add Login Authentication - Step 2/2" screen, set the required items.**



For details on the setting items, see the "Login Authentication Setting Items" section.

9. **Confirm your settings and click "Add".**

Login Authentication Setting Items

Set following items for login authentication.

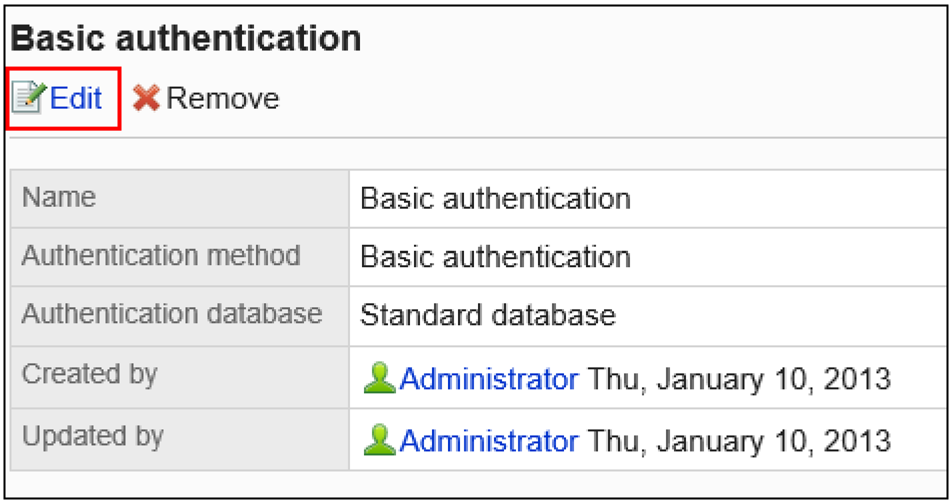
Item	Description
Name	Enter a display name for the login authentication. The name is mandatory.
Environment Variable Name	Enter the name of the environment variable you want to use for authentication. You must set this environment variable name.
Strings starting from this string are excluded in the authentication	If you exclude any string from the value of the environment variable, enter the first string to be excluded.
Strings before this string are excluded in the authentication	If you exclude any string from the value of the environment variable, enter the last string to be excluded.
Authentication Database	You can select an authentication database. To authenticate in Garoon itself, select "Standard Database". If you want to authenticate using an LDAP server, select an LDAP server that has been added as an authentication database.

Changing the Standard Authentication

Items that can be edited in Standard Authentication vary, depending on the number of authentication databases registered with Garoon.

Steps:

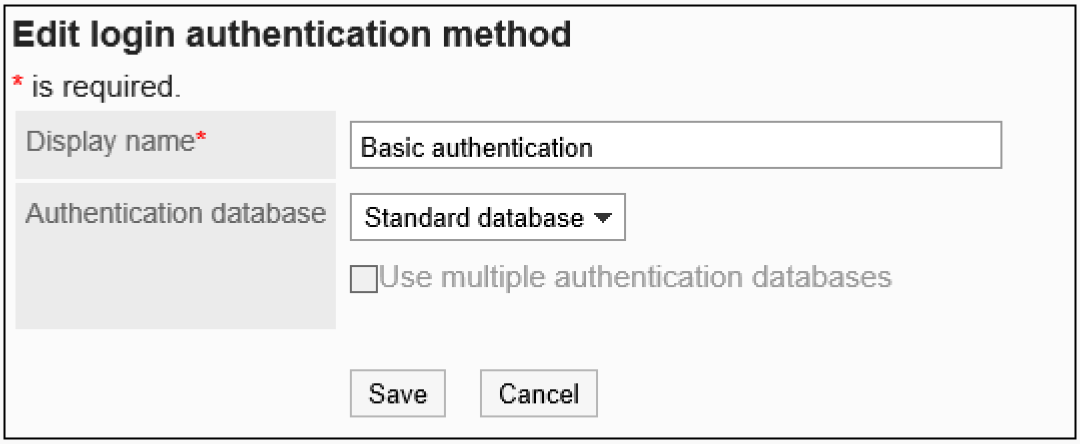
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Login Authentication".**
6. **On the "Login Authentication" screen, click "Standard Authentication".**
7. **On the "Standard Authentication" screen, click "Edit".**



8. **On the "Change Login Authentication" screen, change the standard authentication settings.**

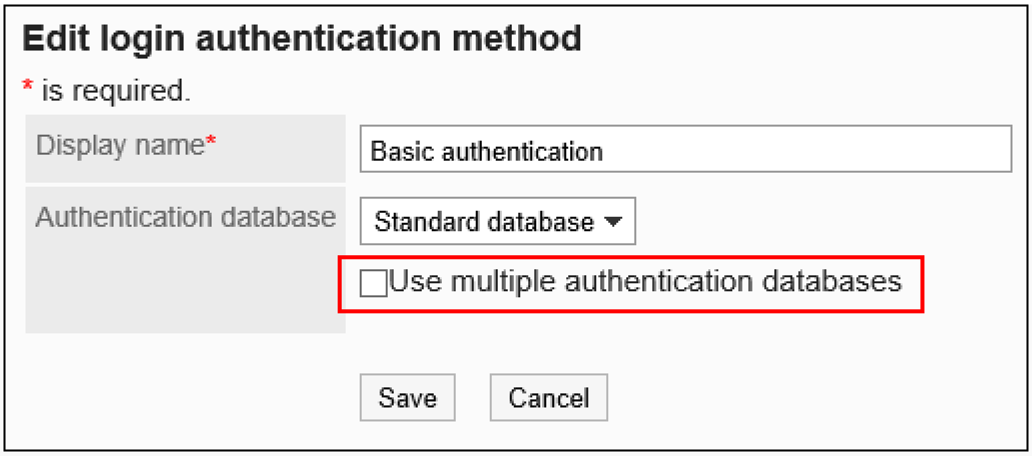
- **If the "Authentication Database" has only "Standard Database"**

Only the display name can be changed.

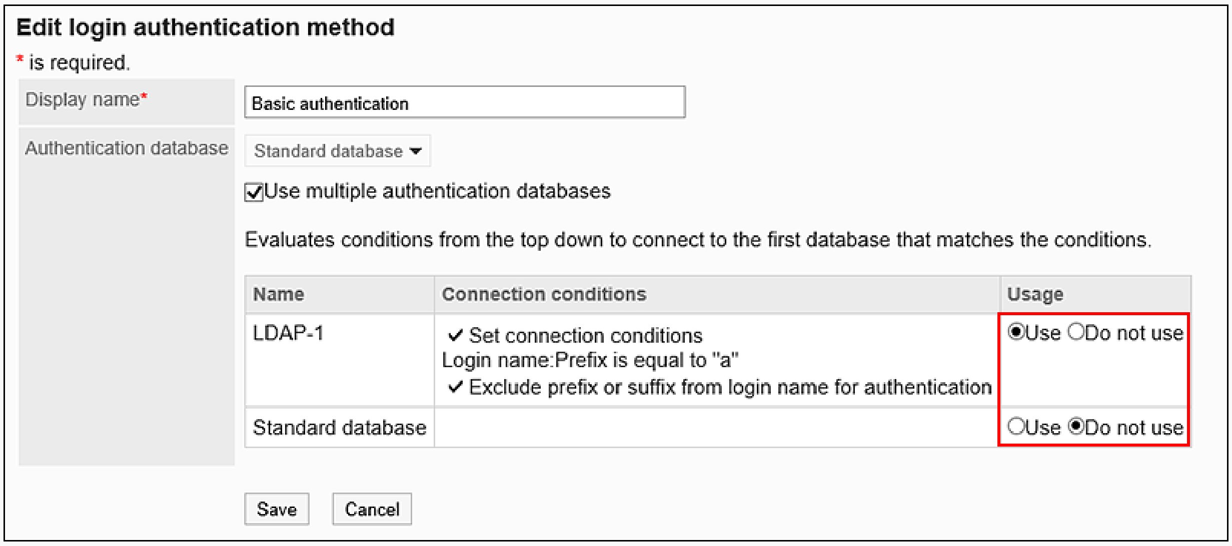


- **If the "Authentication Database" has "Standard Database" and the database registered by the Administrator**

In addition to changing the display name and authentication database, you can set whether to use multiple authentication databases.



To enable multiple authentication databases, select "Use multiple authentication databases".
Also, select the authentication database to use in the "Usage" field.



All the authentication databases registered in Garoon are displayed in the table above.
The display order of authentication databases is the same as the display order of the "Authentication Database" screen. Note that the "Standard Database" always appears at the end of the table.
Evaluates the "Usage" settings and connection conditions from top to bottom, to connect to the first database that matches the conditions.
If connection conditions are not set, databases are assumed to be unconditionally matched.
By reordering authentication databases(193Page), you can change the order in which they are displayed.

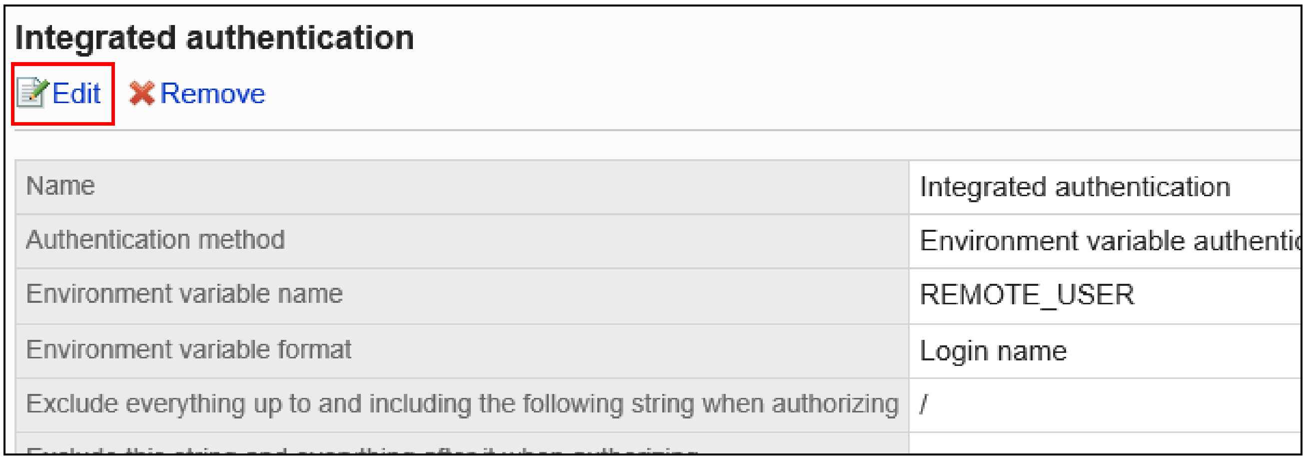
9. Confirm your settings and click "Save".

Changing Registered Login Authentications

You can change the login authentication that has been added by the administrator.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Login Authentication".**
6. **On the "Login Authentication" screen, click the display name of the login authentication that you want to change.**
7. **On the "Standard Authentication" screen, click "Edit".**



8. **On the "Change Login Authentication" screen, change the fields as necessary.**
9. **Confirm your settings and click "Save".**

Deleting Login Authentications

You can delete the added login authentication. If you delete the login authentication, authentication cannot be performed using the deleted authentication type.
You cannot delete Standard Authentication.

Caution

- The deleted login authentication cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

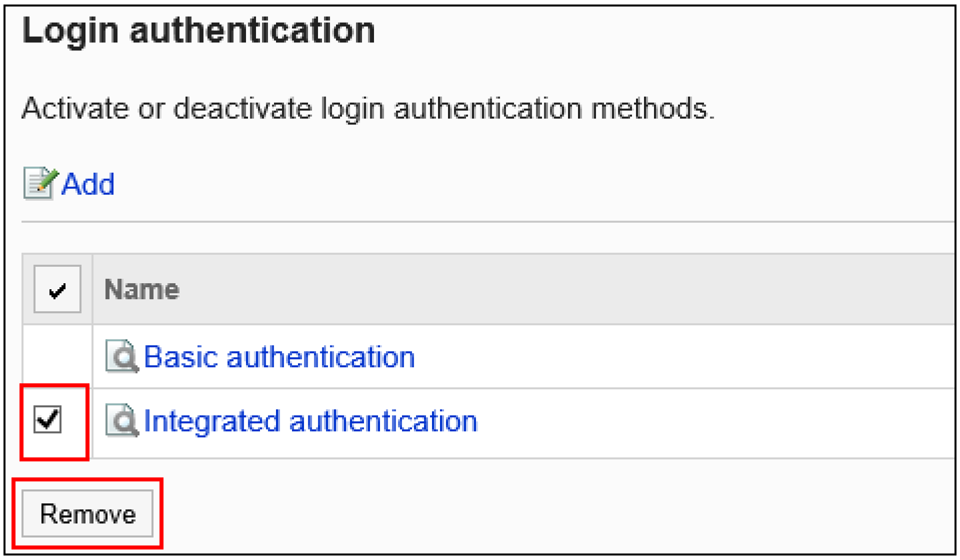
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Authentication".**

5. **Click "Login Authentication".**

6. **On the "Login Authentication" screen, select the check box for the login authentication you want to delete, and then click "Delete".**



7. **Click "Yes" on the "Delete all authentication" screen.**

Note

- In Step 6, you can also delete the login authentication by clicking the display name of the login authentication you want to delete, and then clicking "Delete" on the "Login Authentication Details" screen.

Selecting a Login Authentication to Use

Select the authentication type for the login authentication that you want to use.

Only one login authentication can be used. The login authentication that is being used is displayed as "Active".

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

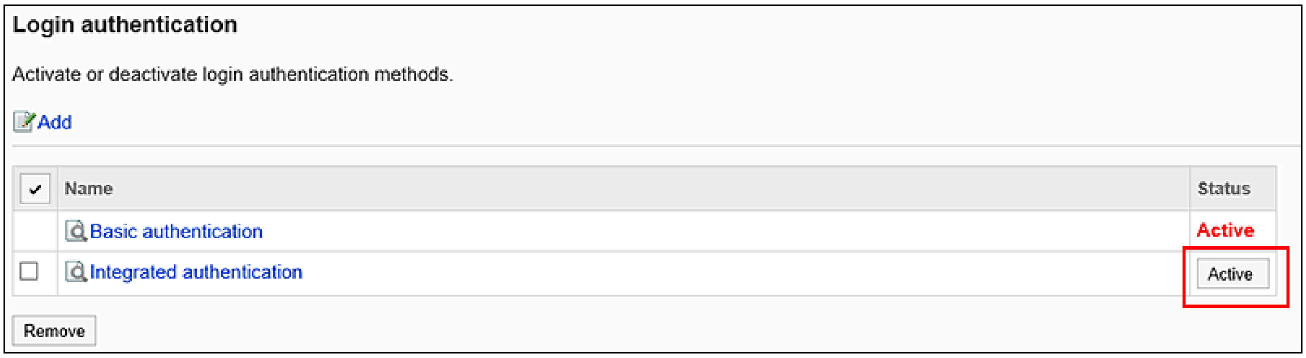
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Authentication".**

5. **Click "Login Authentication".**

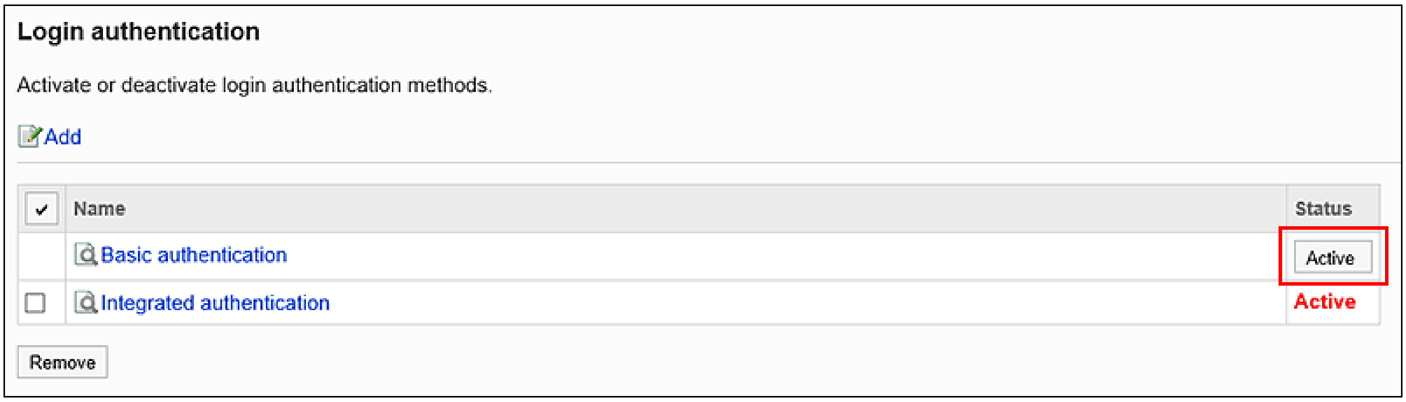
6. **On the "Login Authentication" screen, click "Use" for the login authentication that you want to use.**



7. **Confirm that "Active" is displayed in the "Usage" field of the selected login authentication.**

Stop Using the Selected Login Authentication

You can stop using the selected login authentication.
You can stop using the login authentication by selecting other login authentication, or by deleting the login authentication that you are using.
If you delete the login authentication that you are using, or delete all the login authentication that you have added, standard authentication becomes active.
"Use" is displayed in the "Usage" field for the login authentication that has been deactivated.



You cannot disable a configured login authentication method. You must use one of the login authentications.

1.4.3. Setting Up Session Authentication

Session authentication allows you to log in with single sign-on to the connected system using authentication information authenticated in Garoon. You can also access Garoon with single sign-on using the authentication information obtained from other connected systems.

Caution

- When you use Open Integrated Authentication ver.1, or Open Integrated Authentication ver. 2, you must also enable standard authentication.

Note

- To use an LDAP server for the authentication database, you must configure the Authentication Database Settings(188Page) before you can add or change authentication.

Adding Session Authentications

Add session authentication.

For session authentication, you set the information required to share authentication information between Garoon and other products and systems.

The authentication types available for session authentication are as follows.

- Standard Authentication
- Environment Variable Authentication
- Cybozu Common Authentication
- Open Integrated Authentication ver.2
- Open Integrated Authentication ver.1

By default, standard authentication is selected.

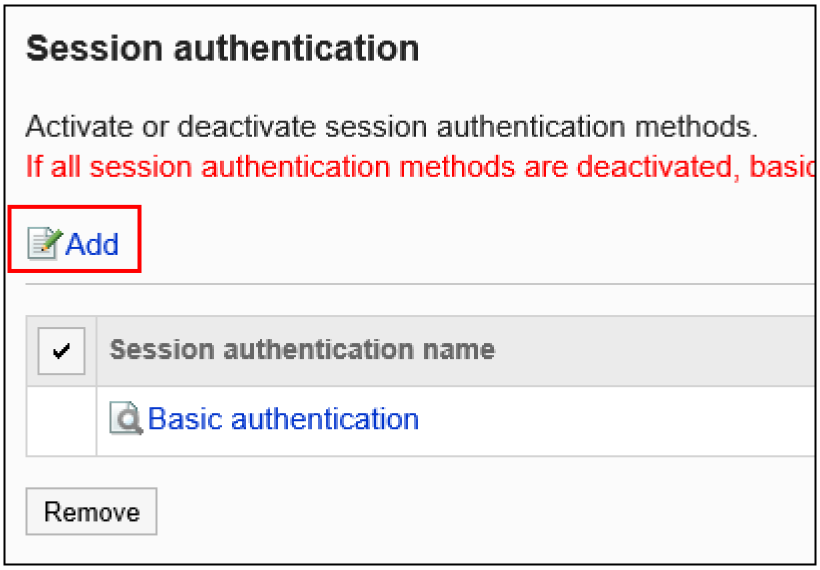
For details on authentication types, see the "Session Authentication(166Page)" section.

Note

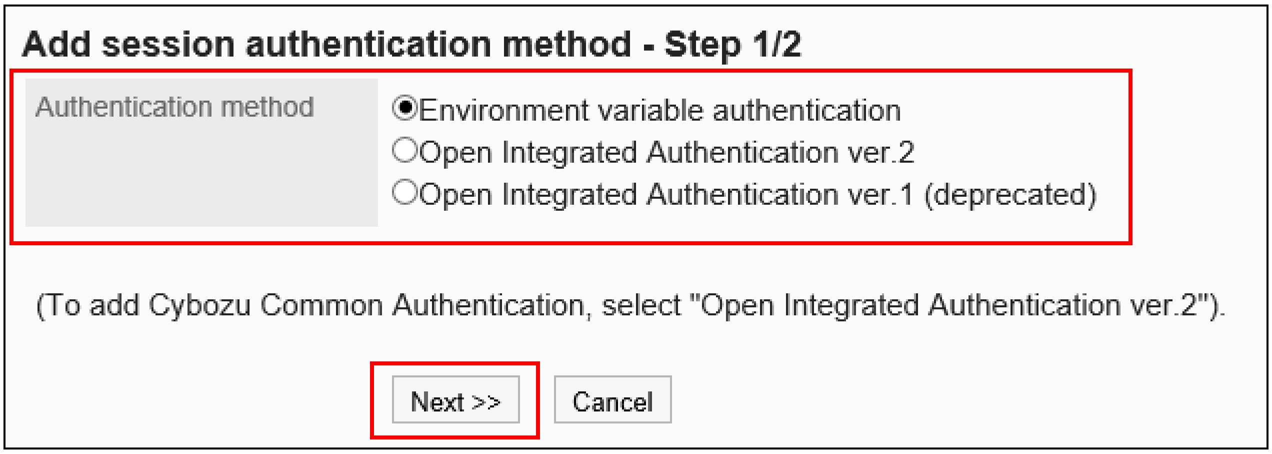
- Only one Open Integrated Authentication ver. 2 can be added.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Session Authentication".**
6. **On the "Session Authentication" screen, click "Add Session Authentication".**



7. **On the "Add Session Authentication - Step 1/2" screen, select the session authentication type, and then click "Next".**

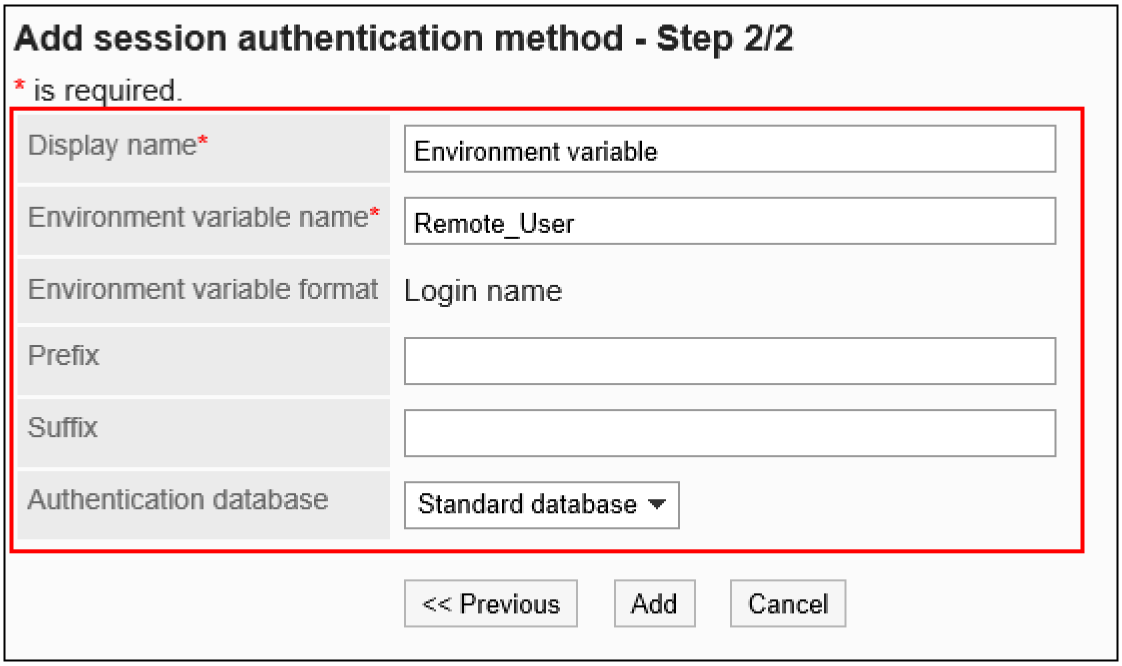


The following authentication types are available.

- Environment Variable Authentication
- Open Integrated Authentication ver. 2
- Open Integrated Authentication ver.1 (deprecated)

To add Cybozu common authentication, select Open Integrated Authentication ver. 2.

8. **On the "Add Session Authentication - Step 2/2" screen, set the required items.**



For details on the setting items, see the "Session Authentication Setting Items" section.

9. Confirm your settings and click "Add".

Session Authentication Setting Items

Fill in the fields as needed for the authentication type.

Environment Variable Authentication

The environment variable authentication settings are as follows.

Item	Description
Name	Enter a display name for the session authentication. The name is mandatory.
Environment Variable Name	Enter the name of the environment variable you want to use for authentication.
Prefix	If you exclude any string from the value of the environment variable, enter the first string to be excluded.
Suffix	If you exclude any string from the value of the environment variable, enter the last string to be excluded.
Authentication Database	Select the database that you want to use for authentication. To authenticate in Garoon itself, select "Standard Database".

Item	Description
	If you want to authenticate using an LDAP server, select an LDAP server that has been added as an authentication database.

Open Integrated Authentication ver. 2 and Cybozu Common Authentication

The following are the setting items for Open Integrated Authentication ver. 2 and Cybozu Common Authentication.

Item	Description
Name	Enter a display name for the session authentication. The name is mandatory.
Mode	You can select one of the following options: • Open Integrated Authentication ver. 2 • Cybozu Common Authentication If you have already configured session authentication using Open Integrated Authentication ver. 2, you can only select "Cybozu Common Authentication". This mode must be set.
Cookie name[1]	Enter a Cookie name to be issued by Garoon or to be authenticated. This field is valid only when the mode is Open Integrated Authentication ver. 2. The Cookie name issued by Garoon is "CB_OPENAUTH". The following Cookie name cannot be specified. • CB_CLOGIN • CB_PLOGIN • CB_API • GRN_Account • CBSESSID
Authentication Password[1]	Password used for authentication. Enter a common password used for the connected system. You must set this authentication password.
Authentication password (for confirmation)[1]	Enter the password you entered in the "Authentication password" field. You must confirm the authentication password.

Item	Description
Active Time	Select the effective time for cookies issued by Garoon. After accessing Garoon, the Cookie issued by Garoon will be discarded if the time you set elapses. This active time must be set.
Issuing Domain[1]	Enter a common domain used in Garoon and the connected product. Domains that are lower than the entered domain are the scope of the Cookie. Example: sample.cybozu.com
Authentication Database	Select the database that you want to use for authentication. To authenticate in Garoon itself, select "Standard Database". For Open Integrated Authentication ver. 2, select "Standard Database". If you want to authenticate using an LDAP server, select an LDAP server that has been added as an authentication database.

[1]: Set the same value as the product being connected.

Caution

- If the login name is "Administrator", the Garoon cannot be single-signed on.

Open Integrated Authentication ver.1

The following are the setting items for Open Integrated Authentication ver.1.

Item	Description
Name	Enter a display name for the session authentication. The name is mandatory.
Integrated Authentication password[1]	Password used for authentication. Enter a common password used for the connected system. You must set this integrated authentication password.

Item	Description
Integrated Authentication Password (for confirmation)[1]	Enter the password you entered in the "Integrated Authentication password" field. You must confirm the integrated authentication password.
Active Time	Select the effective time for cookies issued by Garoon. After accessing Garoon, the Cookie issued by Garoon will be discarded if the time you set elapses.
Cookie issuing domain[1]	Enter a common domain used in Garoon and the connected product. Example: sample.cybozu.com
Cookie Issuance Path[1]	Enter a common path used for Garoon and the connected product. As a security measure, it is recommended that you specify only the required range. Example: /sharepts/cbgr/
Authentication Database	Select the database that you want to use for authentication. To use the Garoon server as the authentication server, select "Standard Database".

[1]: Set the same value as the product being connected.

Caution

- If the login name is "Administrator", the Garoon cannot be single-signed on.

Changing Session Authentications

Change the display name, authentication database, and so on. Editable fields vary, depending on the session authentication type.
For Standard Authentication, only display name and authentication database can be changed.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

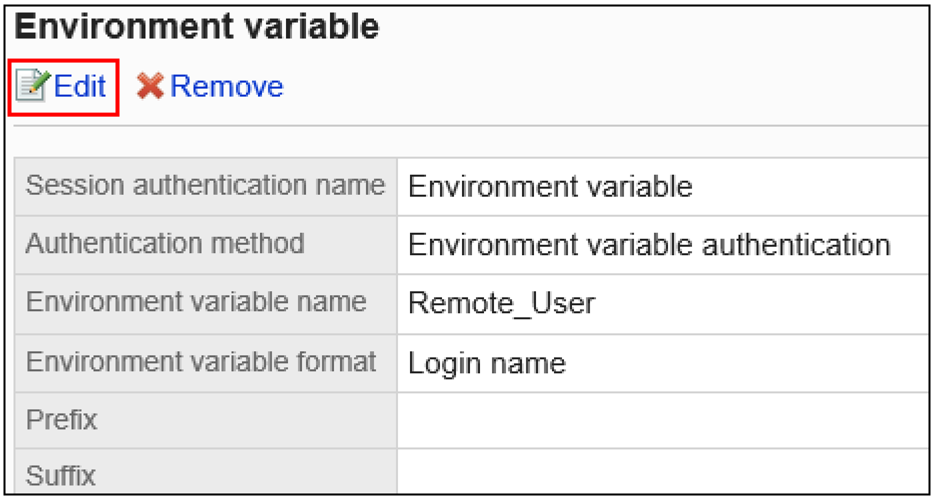
3. **Select "Basic system administration" tab.**

4. **Click "Authentication".**

5. **Click "Session Authentication".**

6. **On the "Session Authentication" screen, click the display name of the session authentication you want to change.**

7. **On the "Session Authentication Details" screen, click "Edit".**



8. **On the "Change Session Authentication" screen, change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Deleting Session Authentications

Delete session authentication. If you delete session authentication, single sign-on using that authentication is disabled. You cannot delete Standard Authentication.

Caution

- The deleted session authentication cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

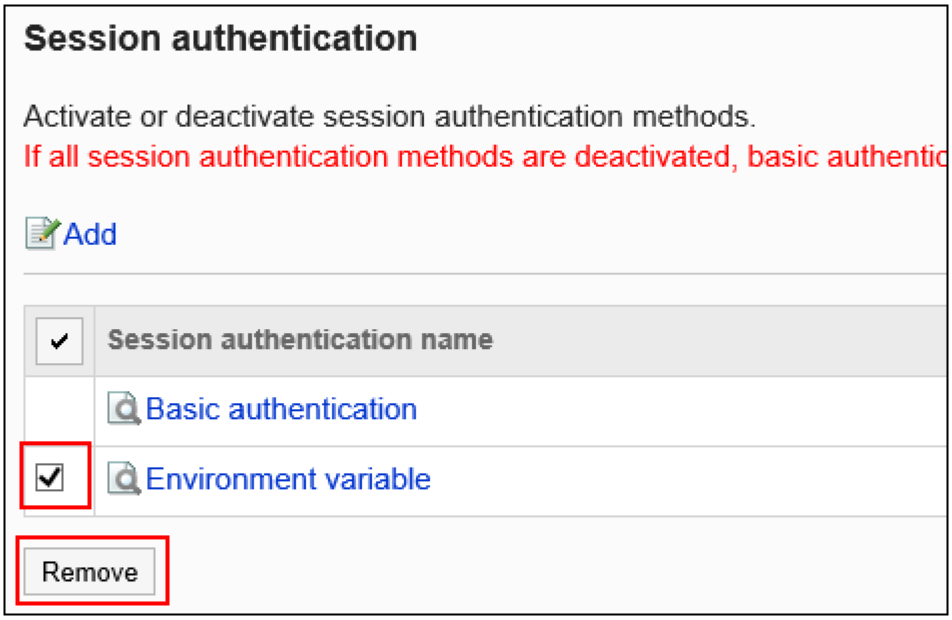
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Authentication".**

5. **Click "Session Authentication".**

6. **On the "Session Authentication" screen, select the check box for the session authentication you want to delete, and click "Delete".**



7. **Click "Yes" on the "Delete all session Authentication" screen.**

Note

- In Step 6, you can also delete the session authentication by clicking the display name of the session authentication you want to delete, and then clicking "Delete" on the "Session Authentication Details" screen.
- If you delete all the session authentication that you have added, standard authentication is used.

Selecting a Session Authentication to Use

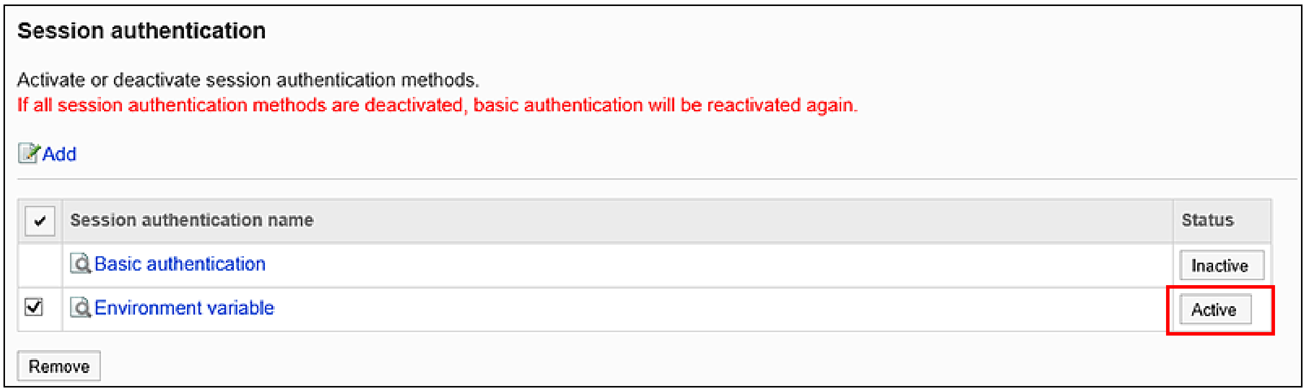
Select the authentication type for the session authentication that you want to use.

Multiple session authentication can be used in combination. The session authentication that is being used is displayed as "Disable".

When using Open Integrated Authentication ver. 2 or Open Integrated Authentication ver.1, standard authentication is also used.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Session Authentication".**
6. **On the "Session Authentication" screen, click "Use" for the session authentication that you want to use.**



7. **Confirm that "Disable" is displayed in the "Usage" field of the selected session authentication.**

Stop Using the Selected Session Authentication

Stop using session authentication.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

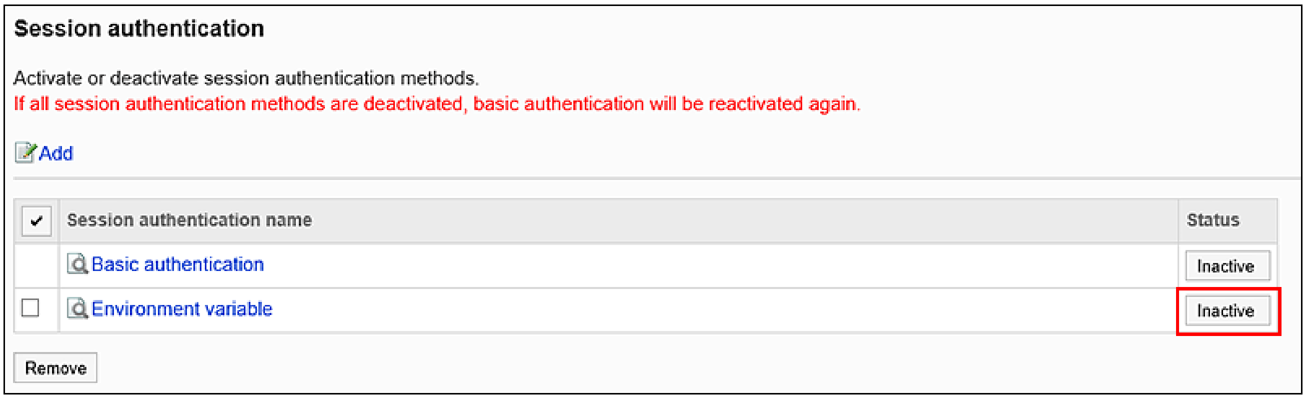
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Authentication".**

5. **Click "Session Authentication".**

6. **On the "Session Authentication" screen, click "Disable" for the session authentication that you want to stop using.**



7. **Confirm that "use" is displayed in the "Usage" field of the session authentication, which has been disabled.**

1.4.4. Authentication Database Settings

You can set authentication databases.
When using an LDAP server, depending on the specifications, you must prevent users from logging in with an empty password,
For details, see the password restrictions(102Page).

Caution

- Cybozu shall not be liable for any loss or damage incurred by Customer due to Customer's setting of Garoon.
  Please use Garoon at Customer's own discretion and responsibility.
  For details, see the License Agreement.

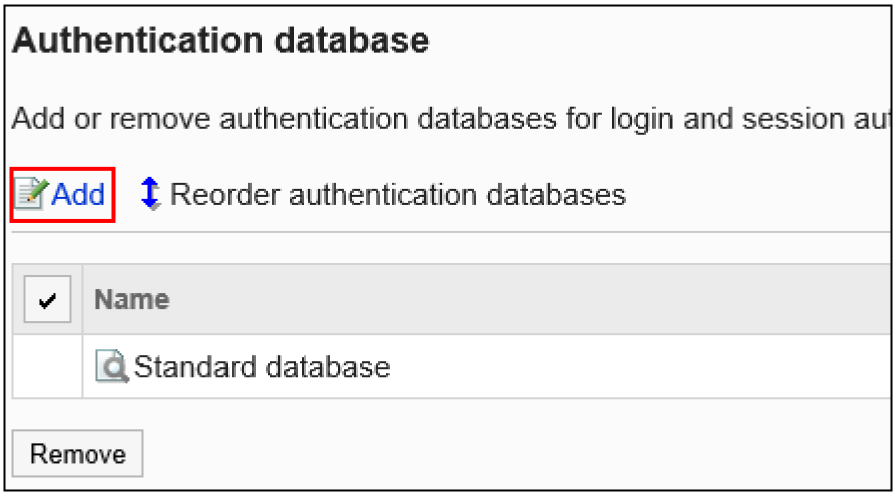
- When using SSL/TLS to connect to an LDAP server, you must change the OpenLDAP settings on the server where Garoon is installed.
  For details, see the Support Guide for settings required to connect to an LDAP server using SSL/TLS.

Adding Authentication Databases

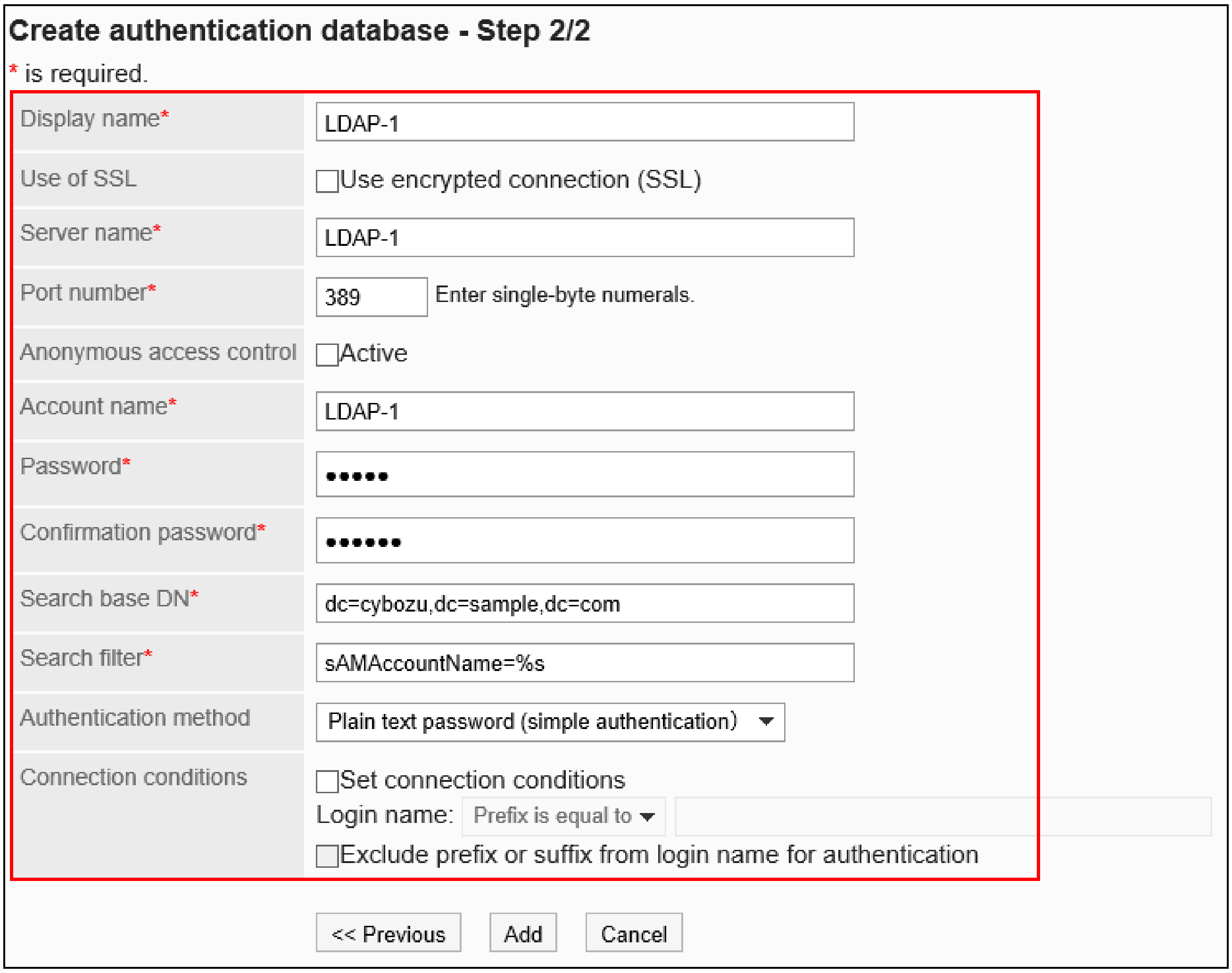
Add an LDAP server as a Garoon authentication database.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Authentication Database".**
6. **Click "Add Authentication Database" on the "Authentication database" screen.**



7. **On the "Add Authentication Database - Step 1/2", confirm that "LDAP" is selected as the authentication database type and then click "Next".**
8. **On the "Add Authentication Database - Step 2/2" screen, set the required items.**



For details on the setting items, see the "Authentication Database Setting Items" section.

9. Confirm your settings and click "Add".

Note

- When using LDAPS as the authentication database type, you do not need to set the port number.

Authentication Database Setting Items

Set following items for authentication database.

Item	Description
Name	Enter a display name for the authentication database. The name is mandatory.
Use of SSL	Select the check box to encrypt the contents sent to the server using SSL.
Server name	Enter the server name of the authentication server you want to use. The server name must be one of the following. • FQDN of the LDAP server • Host Name • IP addresses This Server name must be set.
port number	Enter the port number that you want to use for authentication. This field is disabled if you are using SSL for communication with the server. This port number must be set.
Use Anonymous	Select the check box to use Anonymous user to communicate with the LDAP server.
Account name	Enter the user who communicates with the LDAP server, in the DN format or in the e-mail address format (UserPrincipalName). This field is disabled when using Anonymous. This account name must be set.
password	Enter the password for the account. This field is disabled when using Anonymous. This password must be set.
Confirm Password	Enter the password that you entered in the "Password" field. This field is disabled when using Anonymous. This confirmation password must be set.
Base DN for Search	Enter the base DN for search. Example: dc=cybozu, dc=sample, dc=com
Search Filter	Enter a search filter. Example: (sAMAccountName =% s)

Item	Description
Authentication type	Select an authentication type. The following authentication types are available. • PlainText password (simple authentication) • SASL DIGEST-MD5 • SASL CRAM-MD5
Connection conditions	Select "Set connection conditions" only when you want to set conditions for connecting to an LDAP server. • Login name: Specify login name for the LDAP server by using one of the following conditions. Up to 100 characters can be entered. ◦ Prefix is equal to: Specify the prefix of login name. Example: "ldap_○○○" ◦ Suffix is equal to: Specify the suffix of login name. Example: "○○○_ldap" • Exclude prefix or suffix from login name for authentication: Select the check box to exclude the conditions for login name that you configured above, when authenticating users on an LDAP server.

Note

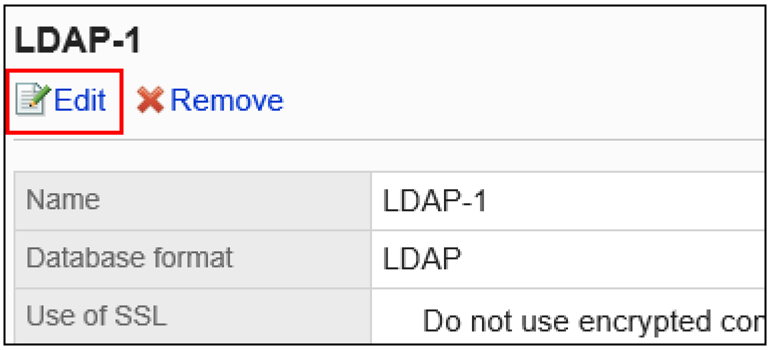
- For details on LDAP server settings, contact the Cybozu official partner or the vendor.

Changing Authentication Databases

Change the authentication database's display name, server name, and so on.
You cannot change settings for standard database.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**
5. **Click "Authentication Database".**
6. **On the "Authentication database" screen, click the display name of the authentication database you want to change.**
7. **On the "Authentication Database Details" screen, click "Edit".**



8. **On the "Change Authentication Database" screen, change the settings as necessary.**
9. **Confirm your settings and click "Save".**

Reordering Authentication Databases

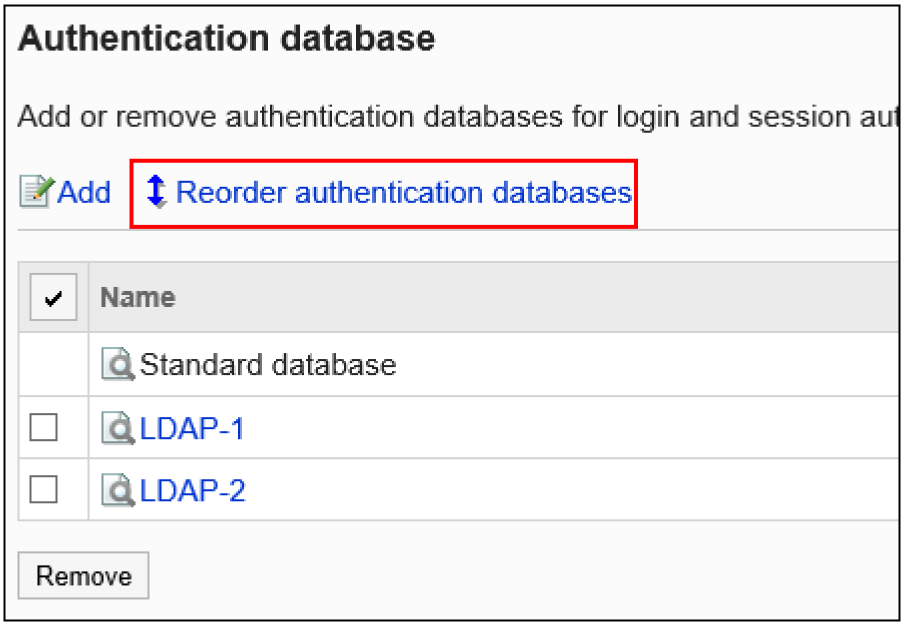
If multiple authentication databases have been added by the administrator, you can reorder them.
However, "standard database" cannot be reordered. It always appears at the top.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Authentication".**

5. **Click "Authentication Database".**

6. **On the "Authentication Database" screen, click "Reorder Authentication Databases".**



7. **On the "Reorder Authentication Databases" screen, change the display order of authentication databases.**

8. **Confirm your settings and click "Save".**

Deleting Authentication Databases

You can delete the authentication database.
If you delete authentication database that is used for login authentication and session authentication, the authentication database that is used for authentication is automatically replaced by the standard database.
You cannot delete the standard database.

Caution

- The deleted database cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

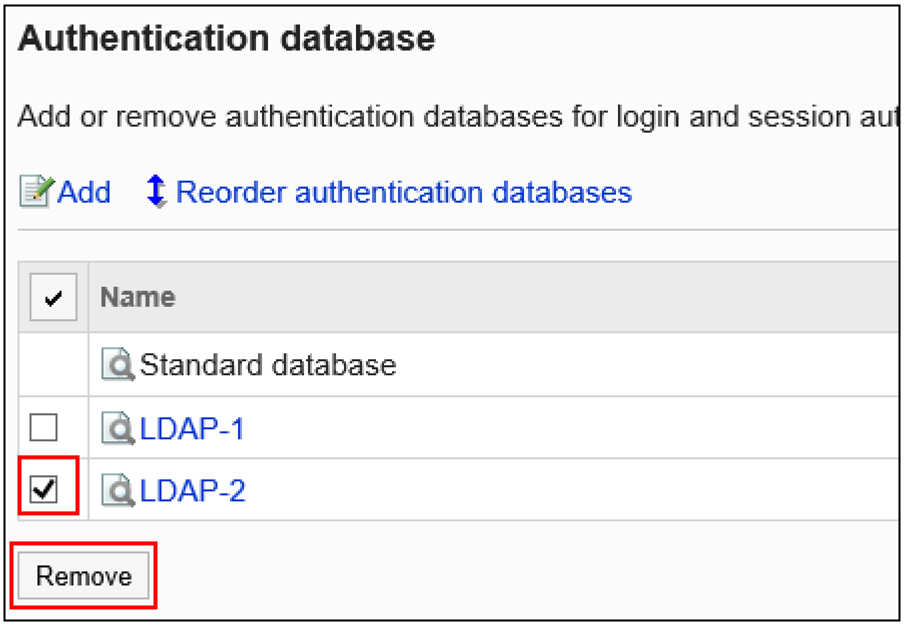
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Authentication".**

5. **Click "Authentication Database".**

6. **On the "Authentication Database" screen, select the check box for the authentication database you want to delete, and then click "Delete".**



7. **Click "Yes" on the "Delete all authentication databases" screen.**

Note

- In Step 6, you can also delete the authentication database by clicking the display name of the authentication database you want to delete, and then clicking "Delete" on the "Authentication Database Details" screen.

1.5. Single Sign-On

This section describes single sign-on for Garoon.
When you set single sign-on, users who have logged in to Garoon once can access other systems on the single sign-on account without going through the login screen.

References

- Single Sign-On Settings(196Page)

1.5.1. Setting up Single Sign-On

"Single sign-on" is a feature to pass the logged-in user's authentication information from Garoon to other systems.
Once users have logged in to Garoon, they do not need to enter account and password for authentication when they access other systems from Garoon.
For details on authentication methods to log in to Garoon and how to keep the authentication information after login, see Authentication System(165Page).

Available authentication methods for Garoon single sign-on feature

- GET Authentication
  This is a form authentication. Systems authenticate users using parameters set in the URL.
  Logged-in users' information is sent as parameters in URL.
- POST Authentication
  This is a form authentication. Systems authenticate users using parameters sent (POST'ed) from Web pages.
  Logged-in users' information is sent using the POST Method.

Note

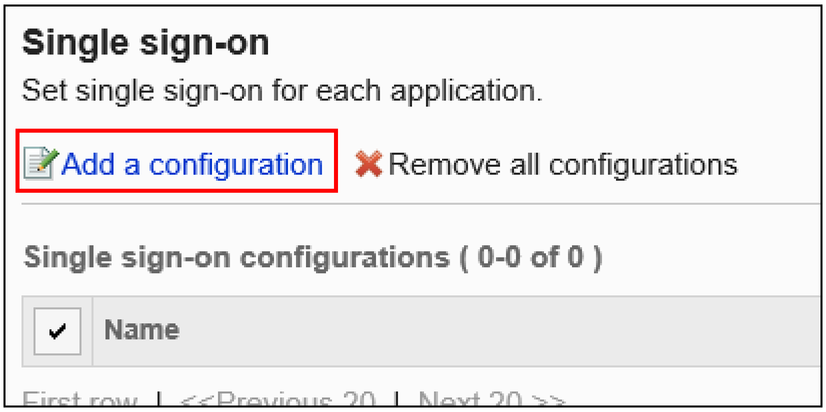
- Users' information is displayed in the URL for GET authentication. Please make sure that the system you use is authentic.

Adding Single Sign-On

You can add a single sign-on configuration between Garoon and other systems including Cybozu products other than Garoon.

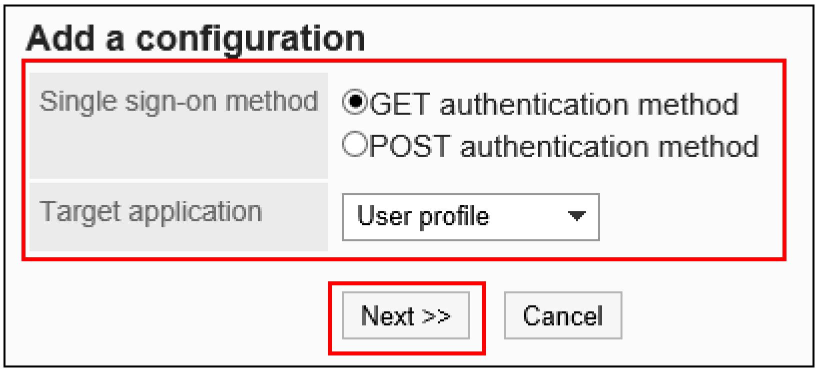
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Single sign-on".**
5. **Click "Single sign-on" settings.**
6. **On the single sign-on settings screen, click "Add a configuration".**

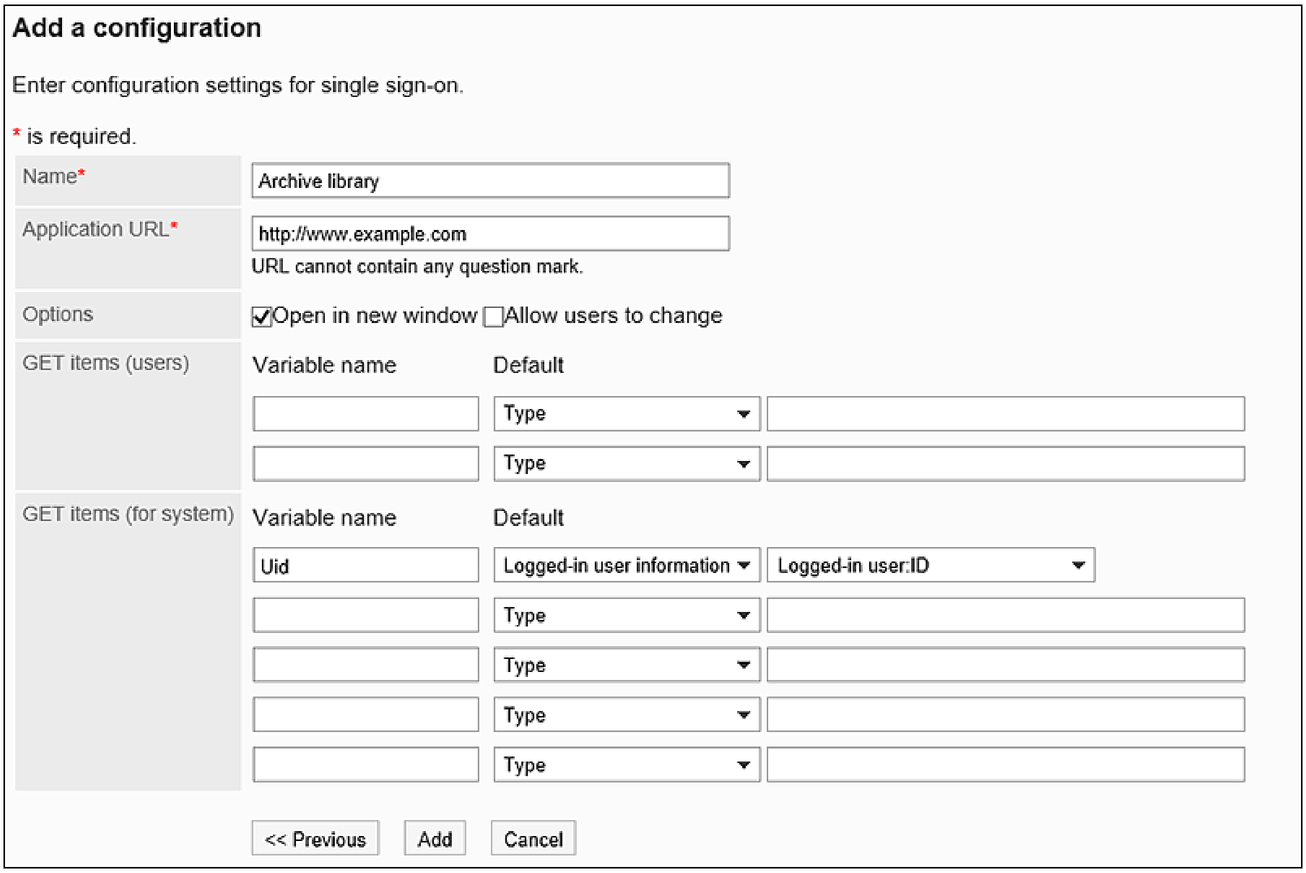


7. **On the "Add a configuration screen, select Single sign-on method and Target application, and click "Next".**
   - Single sign-on method:
     Select either of the following authentication methods.
     - GET Authentication
     - POST Authentication
   - Target application:
     Select the application which contains the data to be sent. Depending on the feature/application you select, items used for GET or POST in step 8 vary.
     Available features and applications are as follows.
     - User profile
     - Bookmarks

- Phone Messages
- Address Book



8. On the "Add a configuration" screen, set the required items.



Items for setting up single sign-on

Item	Description
Name	The name is mandatory. Enter the display name for the single sign-on.
System URL for GET or System URL for POST	The URL is mandatory. Enter the target system URL to send the authentication information using GET or POST.
Options	• Open in new window: A new window is opened to access the system using the single sign-on. • Allow users to change: Allow users to change the single sign-on settings in Personal Settings.
GET items (for users) or POST items (for users)	• Variable name: Enter user variable names. • Default[1]: Select how to enter the user variables from the followings. ◦ Type: Enter the value of the valuable in the input field. ◦ Logged-in user information: Select the variable from the user information of the logged-in user. ◦ Application data: Select the variable from the application data you have selected. Applications you can select are as follows. ▪ User profile ▪ Bookmarks ▪ Phone Messages ▪ Address Book • User variables In the drop-down list, select either the logged-in user information or the item of the selected application. Enter the value of the valuable when you want to set the value manually.

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>GET items (for system)
or
POST items (for system)</td><td>• Variable name:
Enter system variable names.
• Default[1]:
Select how to enter the user variable from the followings.
◦ Type:
Enter the value of the valuable in the input field.
◦ Logged-in user information:
Select the variable from the user information of the logged-in user.
◦ Application data:
Select the variable from the application data you have selected. Applications you can select are as follows.
▪ User profile
▪ Bookmarks
▪ Phone Messages
▪ Address Book
• System variable:
In the drop-down list, select either the logged-in user information or the item of the selected application.
Enter the value of the valuable when you want to set the value manually.</td></tr>
</table>

[1]: The value of this item is used when a user initializes the settings in Personal Settings.

9. Confirm your settings and click "Add".

Note

- After you have configured the single sign-on settings, you need to configure the single sign-on settings also in the selected application. For details, see the following page:
  - User profile: Managing User Profile Items(91Page)
  - Bookmarks: Settings for Shared Bookmarks(820Page)
  - Phone Messages: General Settings for Phone Messages(1073Page)
  - Address Book: Settings for Address Book Items(1112Page)

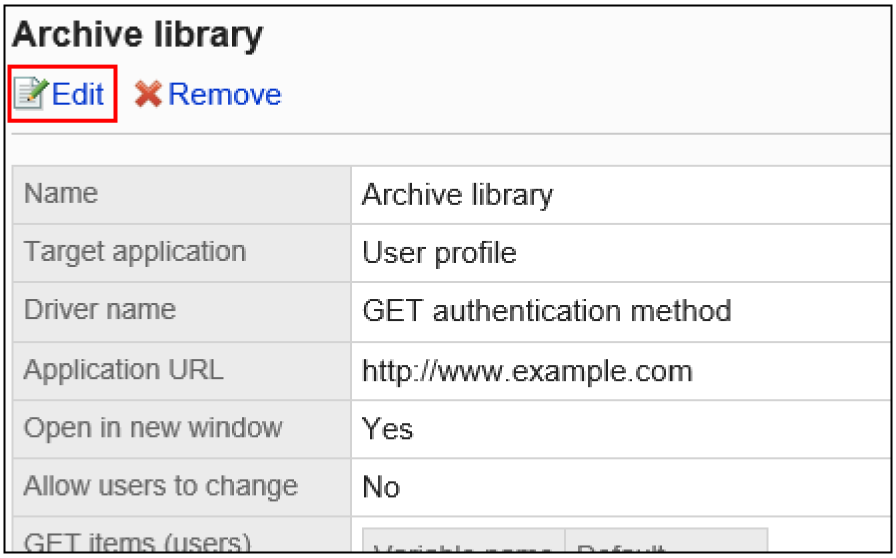
Changing Single Sign-On

You can change the single sign-on configuration.

However, you cannot change the target application for variables.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Single sign-on".**
5. **Click "Single sign-on" settings.**
6. **On the single sign-on settings screen, select the single sign-on name you want to change.**
7. **On the single sign-on details screen, click "Edit".**



8. **On the "Change single sign-on configuration" screen, change the fields as necessary.**
9. **Confirm your settings and click "Save".**

Removing Single Sign-On Configuration

You can remove the single sign-on settings.
If you remove the single sign-on settings for products/systems other than Garoon, you need the authentication information such as account and password to access them.

Caution

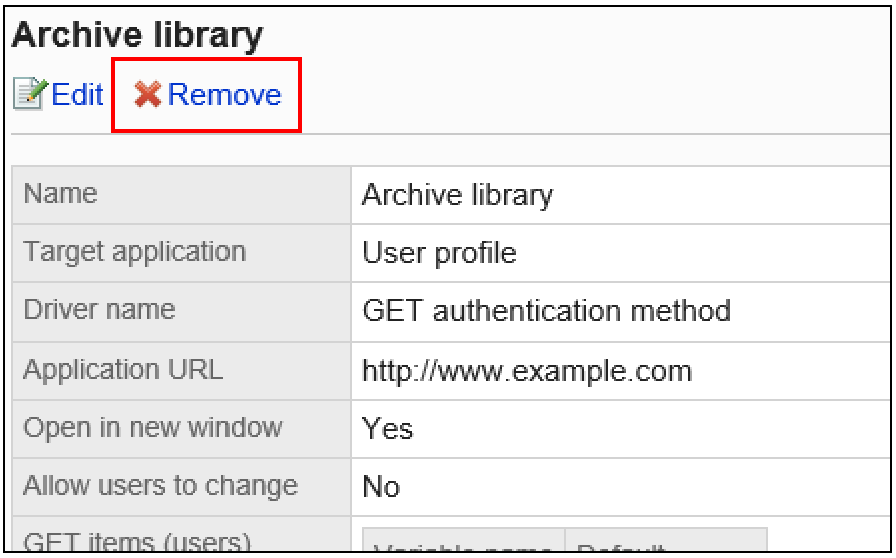
- Removed single sign-on configuration cannot be restored.

Removing Single Sign-On Configuration One by One

You can remove the single sign-on configuration one by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Single sign-on".**
5. **Click "Single sign-on" settings.**
6. **On the single sign-on settings screen, select the single sign-on name you want to remove.**
7. **On the single sign-on details screen, click "Remove".**



8. Click "Yes" on the "Remove configuration" screen.

Removing Multiple Single Sign-On Configurations in Bulk

You can select single sign-on configurations and delete them all together.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Single sign-on".

5. Click "Single sign-on" settings.

6. On the single sign-on settings screen, select the single sign-on check boxes that you want to remove and click "Remove".

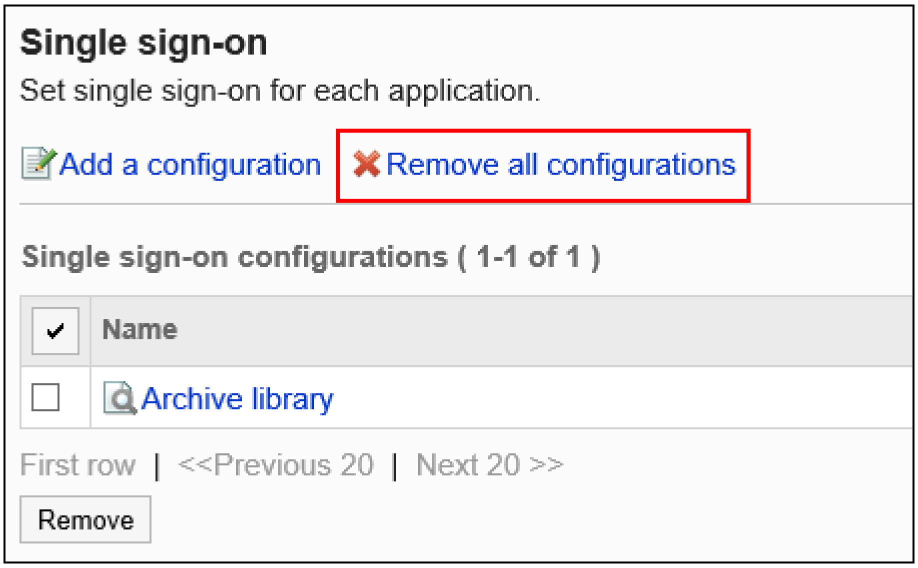
7. **Click "Yes" on the "Remove configurations" screen.**

Removing All Single Sign-On Configurations

You can remove all single sign-on configurations.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Single sign-on".**
5. **Click "Single sign-on" settings.**
6. **On the single sign-on settings screen, click "Remove all configurations".**



7. **Click "Yes" on the "Remove all configurations" screen.**

1.6. Application

In the "Application" of the system administration, you can edit the name of Garoon applications and allow users to use applications.

You can set permissions to use applications for each organization, user, or role.

If you set "Remote access rule" on the "Application users" screen, you can limit which applications are available to users when they remotely access Garoon.

References

- Using Applications(206Page)
- Flow of Application Users Settings(211Page)
- Limiting Application Users(213Page)
- Remote access rule(221Page)

1.6.1. Using Applications

For each application, you can set to stop using the application or to resume using it.

Stop Using Applications

You can deactivate applications.

Deactivated applications do not appear on both the user screen and the administration screen.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

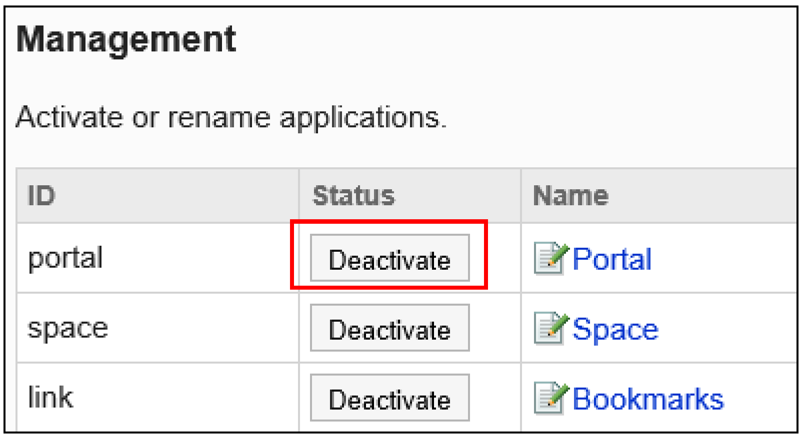
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Application".

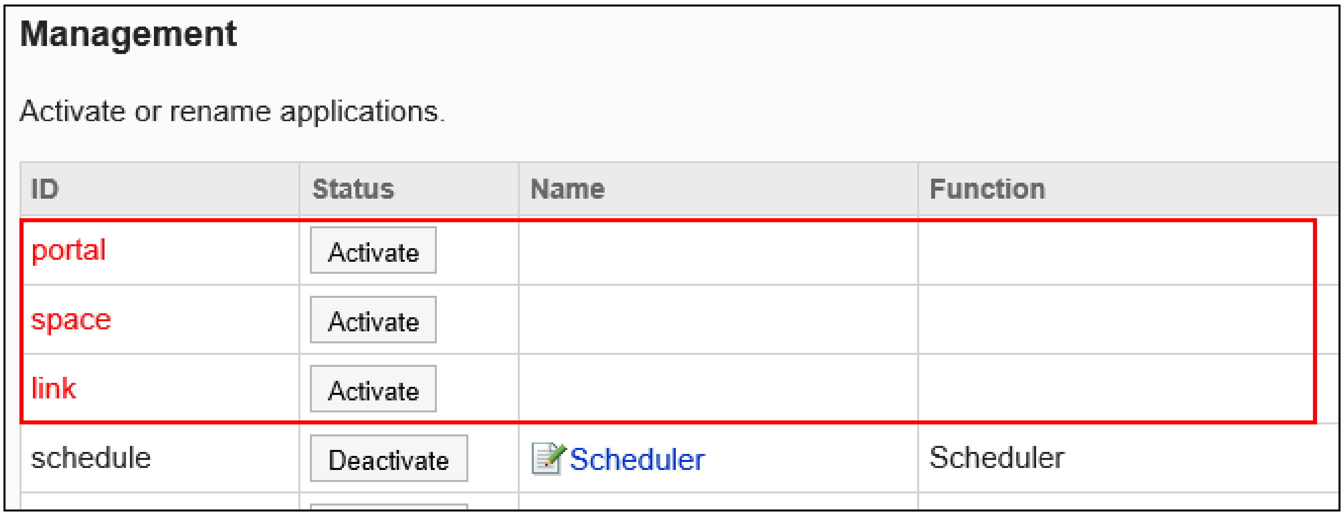
5. Click "Management".

6. In the "Management" screen, click "Deactivate" for the application which you want to deactivate.



When Disabling Portals, Spaces, and Links

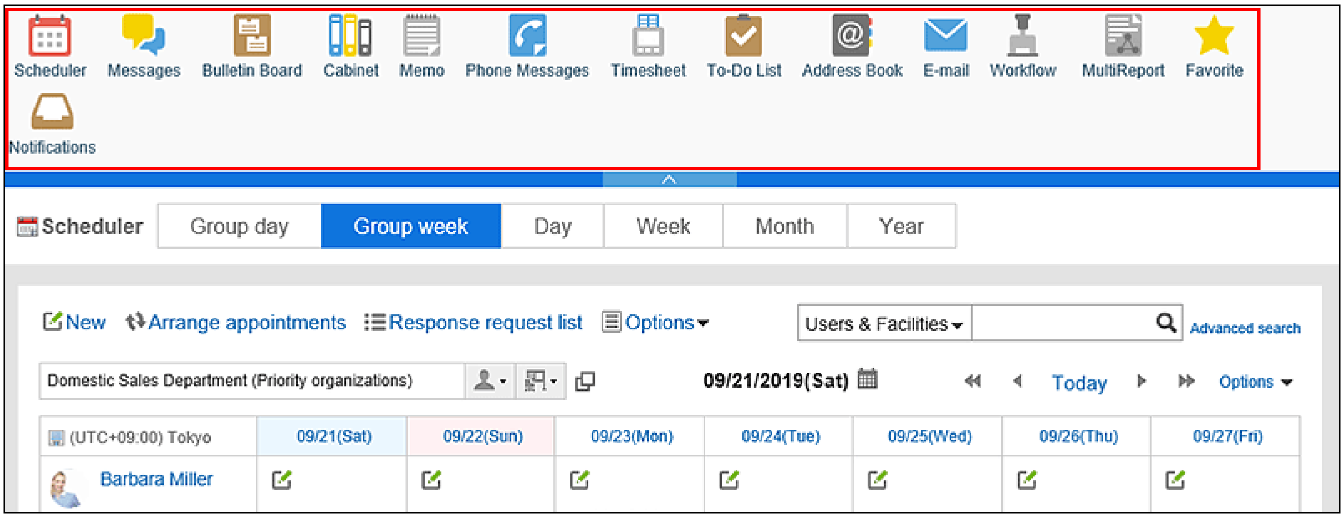
- **Management screen of system administration:**
  Application ID of the deactivated application turns red, and the deactivate button is displayed.



- **User screens:**

  Deactivated applications are not displayed on the user's screen.

  The application menus and the portlets placed in the portal are not displayed as well.



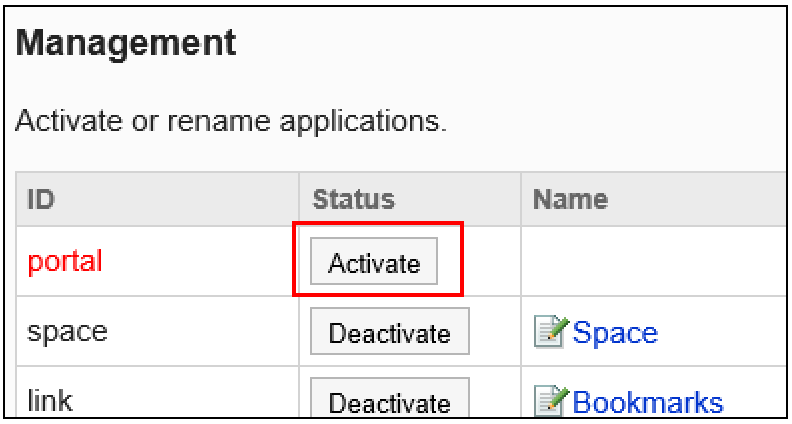
Getting Started with Applications

You start using applications.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Application".**
5. **Click "Management".**

6. **In the "Management" screen, click "Activate" for the application which you want to activate.**



1.6.2. Editing Application Names

You can rename applications.
Depending on the type of application, renewed application name will be reflected in button names and link names.
You can also edit the "Like" label of the respond feature from "Edit application name" screen.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

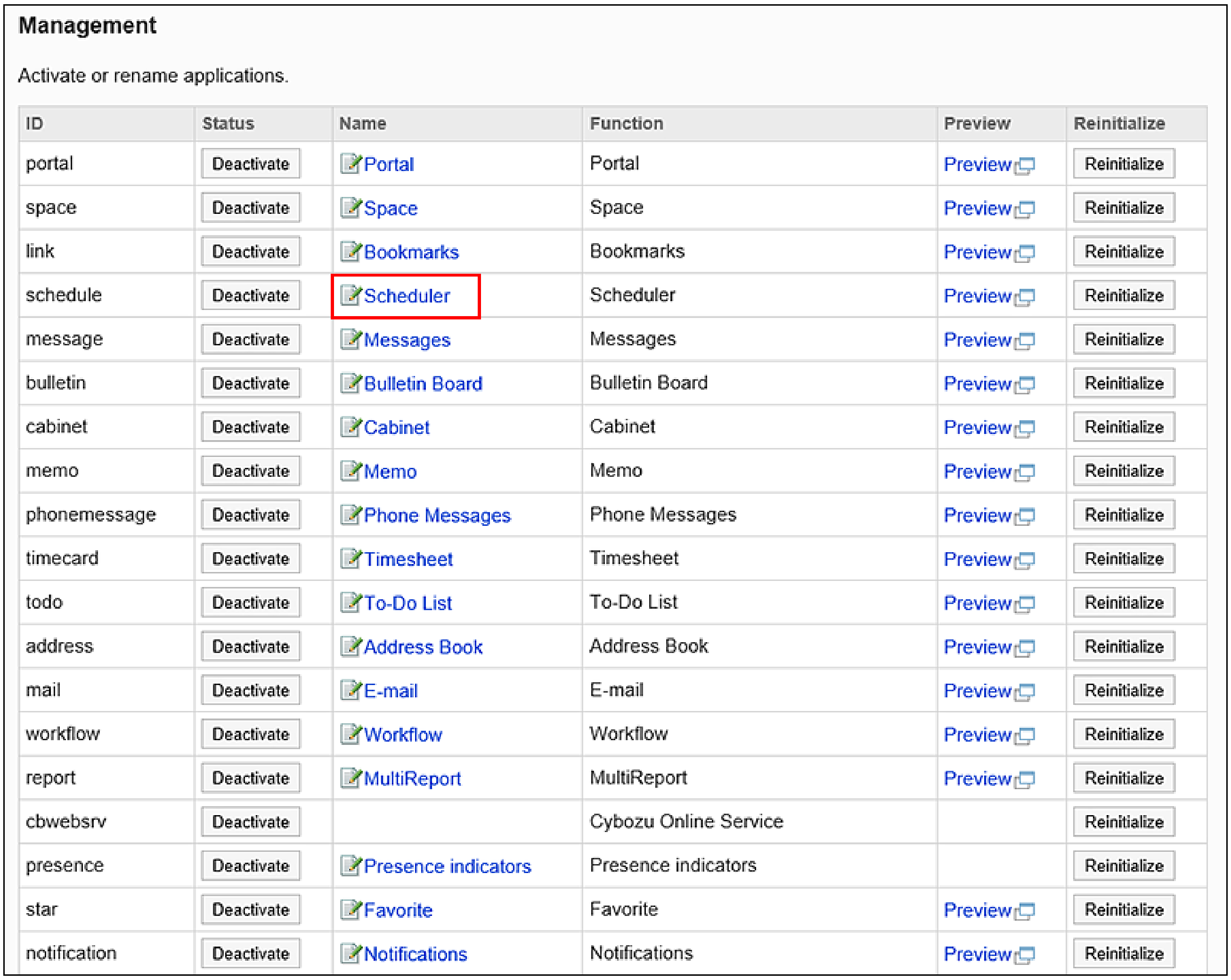
3. **Select "Basic system administration" tab.**

4. **Click "Application".**

5. **Click "Management".**

6. **On the "Management" screen, click the application you want to rename.**

"Cybozu Online Service" cannot be renamed.
If you want to change the "Like" label of the respond feature, click "Like" in the "Name" field.

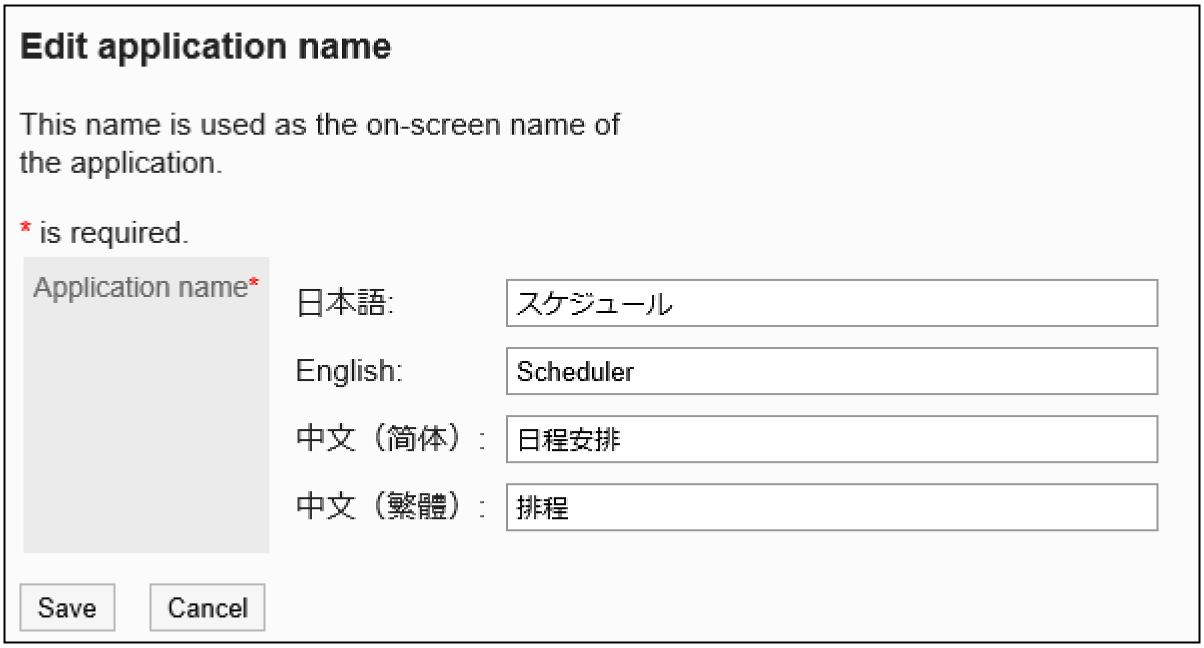

Management

Activate or rename applications.

ID	Status	Name	Function	Preview	Reinitialize
portal	Deactivate	Portal	Portal	Preview	Reinitialize
space	Deactivate	Space	Space	Preview	Reinitialize
link	Deactivate	Bookmarks	Bookmarks	Preview	Reinitialize
schedule	Deactivate	Scheduler	Scheduler	Preview	Reinitialize
message	Deactivate	Messages	Messages	Preview	Reinitialize
bulletin	Deactivate	Bulletin Board	Bulletin Board	Preview	Reinitialize
cabinet	Deactivate	Cabinet	Cabinet	Preview	Reinitialize
memo	Deactivate	Memo	Memo	Preview	Reinitialize
phonemessage	Deactivate	Phone Messages	Phone Messages	Preview	Reinitialize
timecard	Deactivate	Timesheet	Timesheet	Preview	Reinitialize
todo	Deactivate	To-Do List	To-Do List	Preview	Reinitialize
address	Deactivate	Address Book	Address Book	Preview	Reinitialize
mail	Deactivate	E-mail	E-mail	Preview	Reinitialize
workflow	Deactivate	Workflow	Workflow	Preview	Reinitialize
report	Deactivate	MultiReport	MultiReport	Preview	Reinitialize
cbwebsrv	Deactivate		Cybozu Online Service		Reinitialize
presence	Deactivate	Presence indicators	Presence indicators		Reinitialize
star	Deactivate	Favorite	Favorite	Preview	Reinitialize
notification	Deactivate	Notifications	Notifications	Preview	Reinitialize

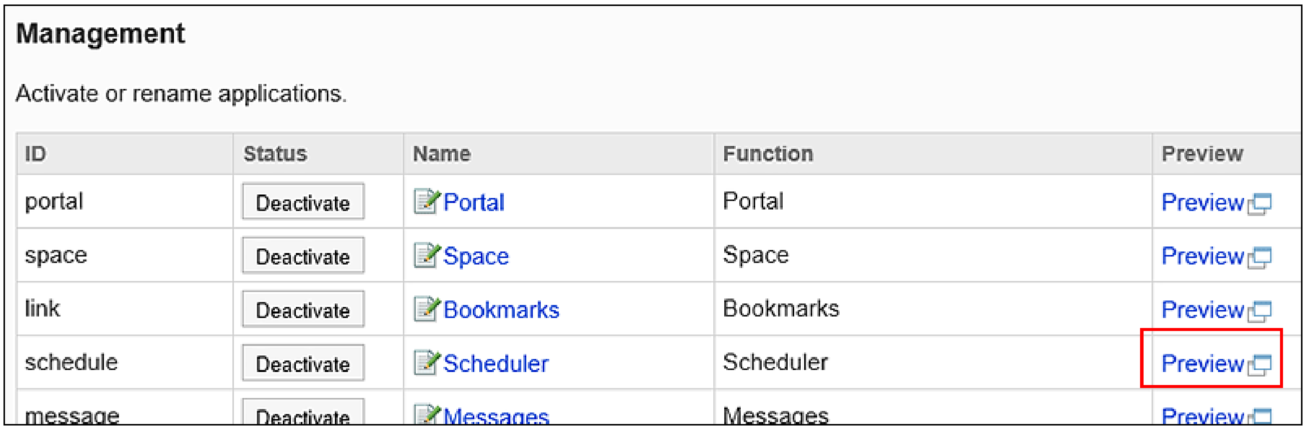
7. On the "Edit application name" screen, enter a new name.

You can set the application name for each language.



8. Confirm your settings and click "Save".

On the "Management" screen, you can check the settings by clicking "Preview" for the application you want to check.



1.6.3. Initializing Applications

This section describes how to initialize an application.

Caution

- All registered data will be deleted when this reinitialization for the application is performed.
- Initialized applications cannot be restored.

Steps:

1. Click the administration menu icon (gear icon) in the header.

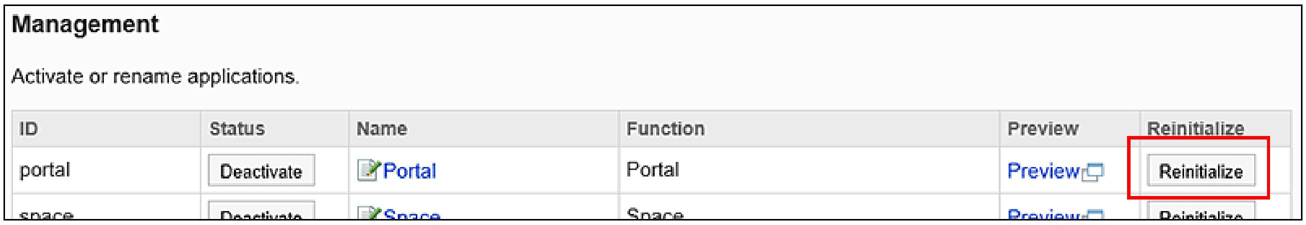
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Application".

5. **Click "Management".**

6. **In the "Management" screen, click "Reinitialize" of the application which you want to reinitialize.**



7. **Click "OK" in the confirmation screen.**

Note

- To initialize the entire garoon, use the command.
  For details, see the "Garoon Initializing Commands(1726Page)" section.

1.6.4. Flow of Application Users Settings

Allow applications to be used by organizations, users, or roles.

By setting "Remote access rule", you can limit applications that users can use when they remotely access Garoon.

This section describes the steps to do this.

Steps:

Step 1 Select applications for which remote access is allowed.

Step 2 Set "Remote access rule" if necessary.

Step 3 Select applications for which remote access is allowed.

Step 1	**Select applications for which remote access is allowed.**

For details, refer to the "Limiting Application Users(213Page)" section.

Step 2 **Set "Remote access rule" if necessary.**

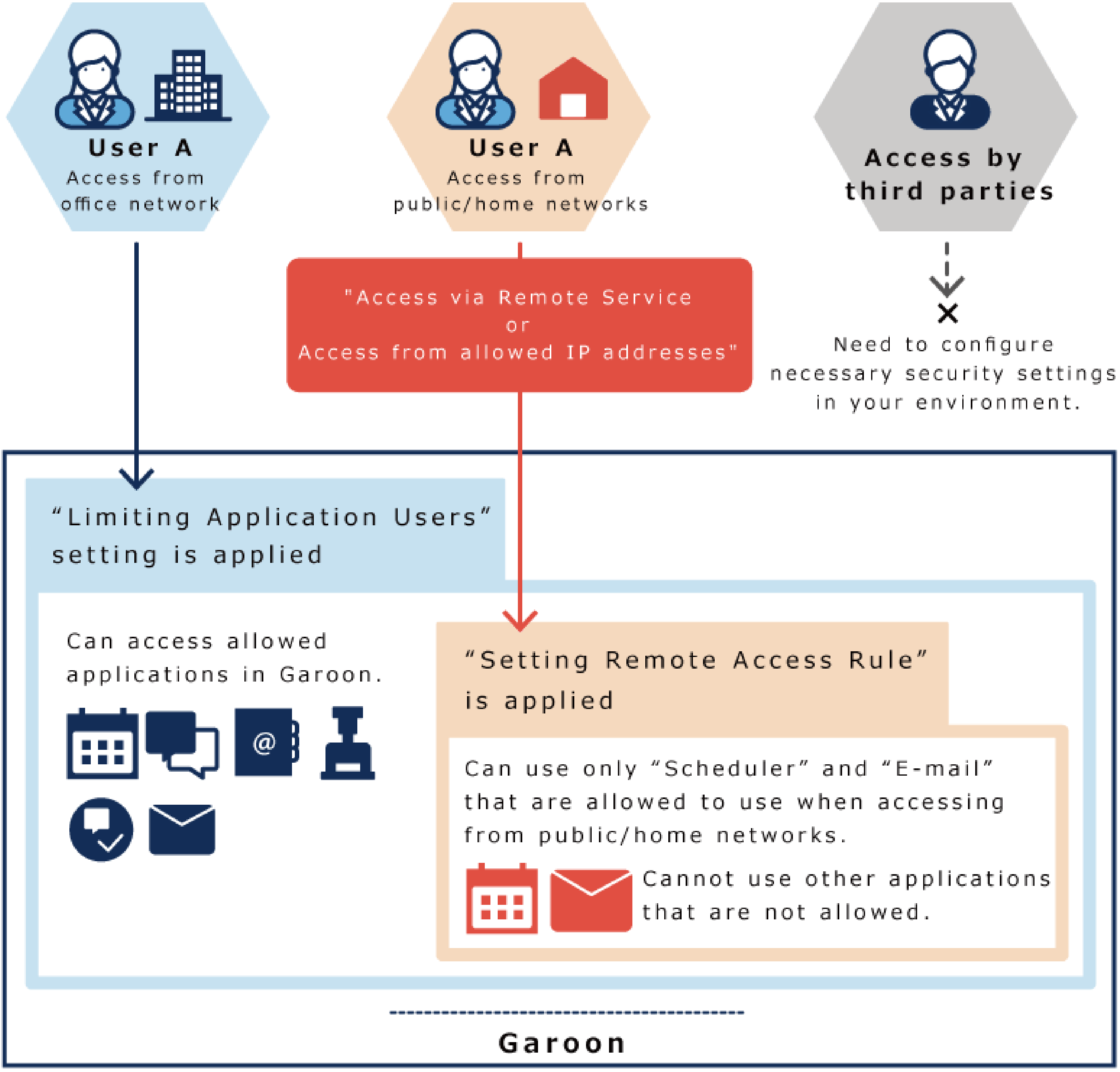
Set this rule if you want to limit applications that are available to remote users.
For details, refer to the "Remote access rule(221Page)" section.

Step 3 **Select applications for which remote access is allowed.**

If you set "Remote access rule" in Step 2, set applications that are available to remote users, apart from available applications that you set in Step 1.
For details, see Step 10 in the "Remote access rule(221Page)" section.

Image of Limiting Remote Accesses

For example, by setting "Remote access rule", you can allow only schedulers and mails to be accessed remotely while allowing all applications to be accessed within the office.



1.6.5. Limiting Application Users

You can limit which applications are available to users for each organization, user, or role.

If multiple targets are set for one user, that user can access applications allowed for one of the targets.

Applications that are not allowed to use are not displayed on the user screen. Users who are not allowed to use schedulers, messages, etc. cannot be specified as attendees or recipients.

Applications for Which Application Users Can Be Set

- Space
- Bookmarks
- Scheduler
- Messages
- Bulletin Board
- Cabinet
- Phone Messages
- Timesheet
- Address Book:
  The "User list" does not appear on the "Address Book" screen of users who are not allowed to use the application. However, when you select a user in applications such as Scheduler or Messages, user information for the user appears.
- E-mail
- Workflow
- MultiReport

Applications for Which Application Users Cannot Be Set

- Portal:
  Portlets of applications that are not allowed to use are not displayed on the portal.
- Memo
- To-Do List
- Cybozu Online Service:
  To use Cybozu Online Service, you must set up the service.
  For details, refer to the "Cybozu Online Service(1592Page)" section.
- Presence indicators
- Favorite
- Notifications:
  Notifications of applications that are not allowed to use are not displayed on the notification list.
- KUNAI:
  On the "User permissions(1639Page)" screen of KUNAI, set applications available for each user in KUNAI.
- Respond
- Image Assets

Note

- Icons of applications that are not allowed to use change to grayed out icons, indicating that they are unavailable.
  Space Example: 

- If an application is prohibited to use, the icon of the last message sender or the user who last updated the bulletin board will be grayed out .

Applications That Are Deactivated by Default

Upgrading Garoon may deactivate Workflow, MulriReport, and the respond feature.
You need to activate them, if necessary. For details, see the "Getting Started with Applications(207Page)" section.

The following conditions apply.

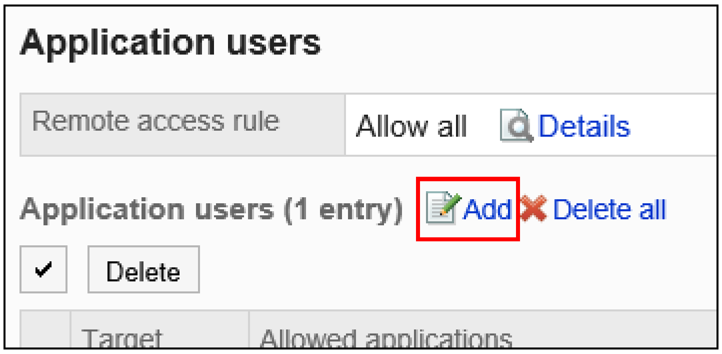
- Workflow:
  Upgraded to 2.1.0 or later Garoon from earlier versions.
- MultiReport:
  Upgraded to 3.0.0 or later Garoon from earlier versions.
- Reaction:
  Upgraded to 4.0.0 or later Garoon from earlier versions.

Adding Application Users

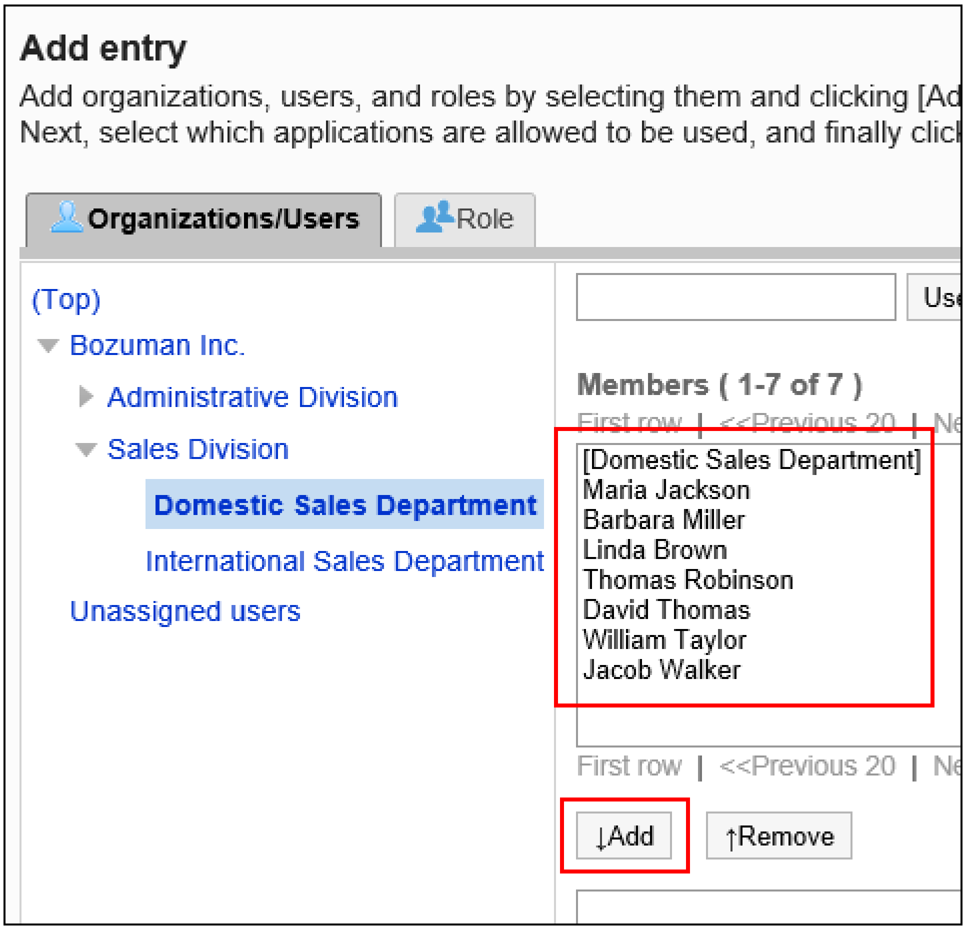
Add organizations, users, and roles and select which applications are available to the selected users.
Inactivated applications are not displayed. If you do not see the application you want to make available, check whether the application is set to "Activate".
For details, refer to the "Using Applications(206Page)" section.
In the example used in this section, "Remote access rule" is set to "Allow all".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Application".**
5. **Click "Application users".**
6. **On the "Application users" screen, click "Add".**

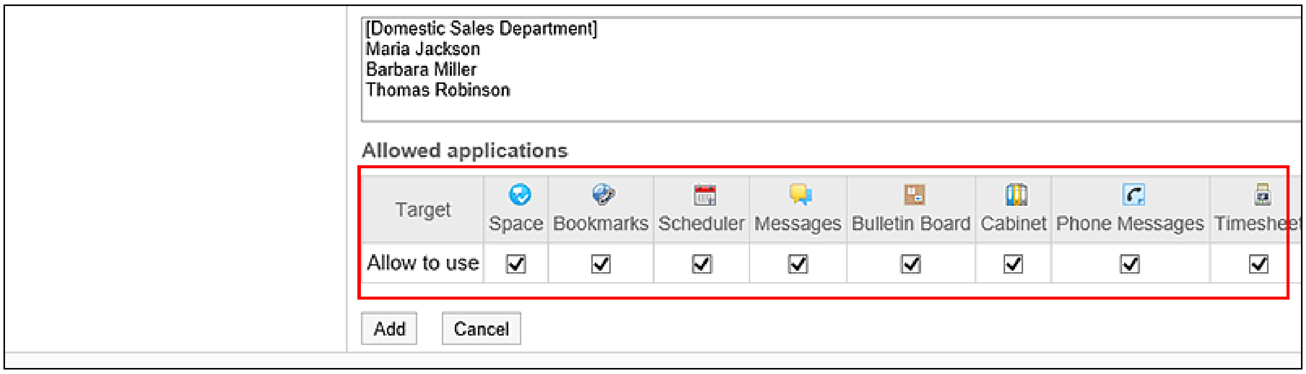


7. **On the "Add Target" screen, select the organization, user, or role you want to add, and click "Add".**



8. **Select the check boxes of the applications you want to make available.**

If "Remote access rule" is set to "Allow all", only the "Allow to use" field is displayed. The "Allow to remote access" field is not displayed.



9. **Confirm your settings and click "Add".**

Changing Allowed Applications

To change applications available to users:

In the example used in this section, "Remote access rule" is set to "Allow all".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

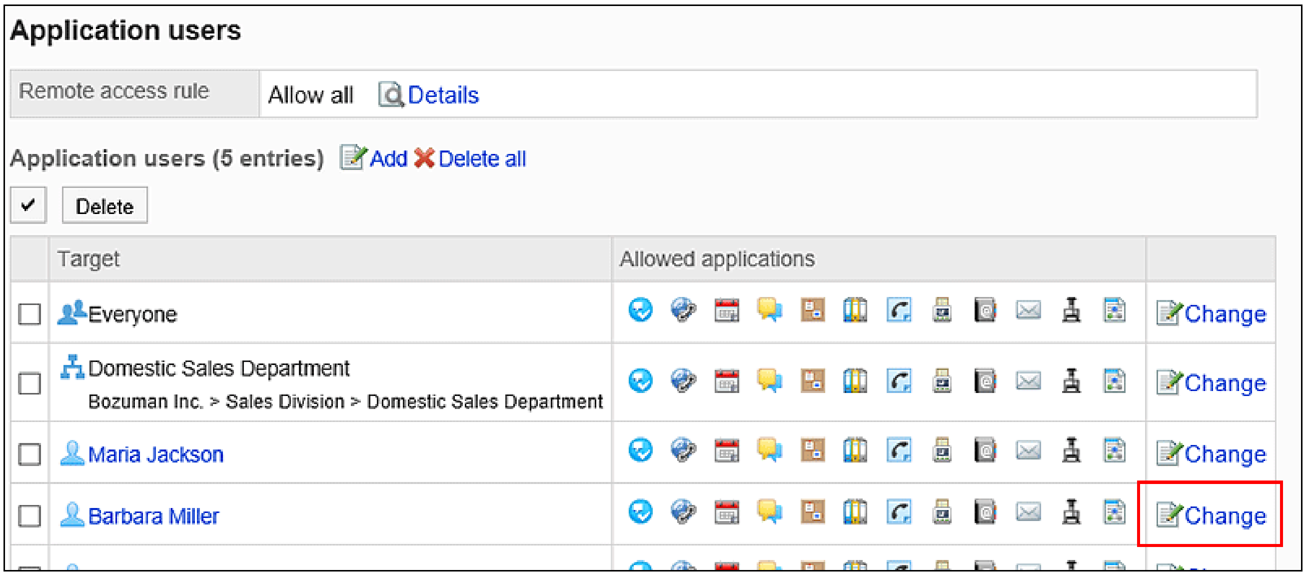
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Application".**

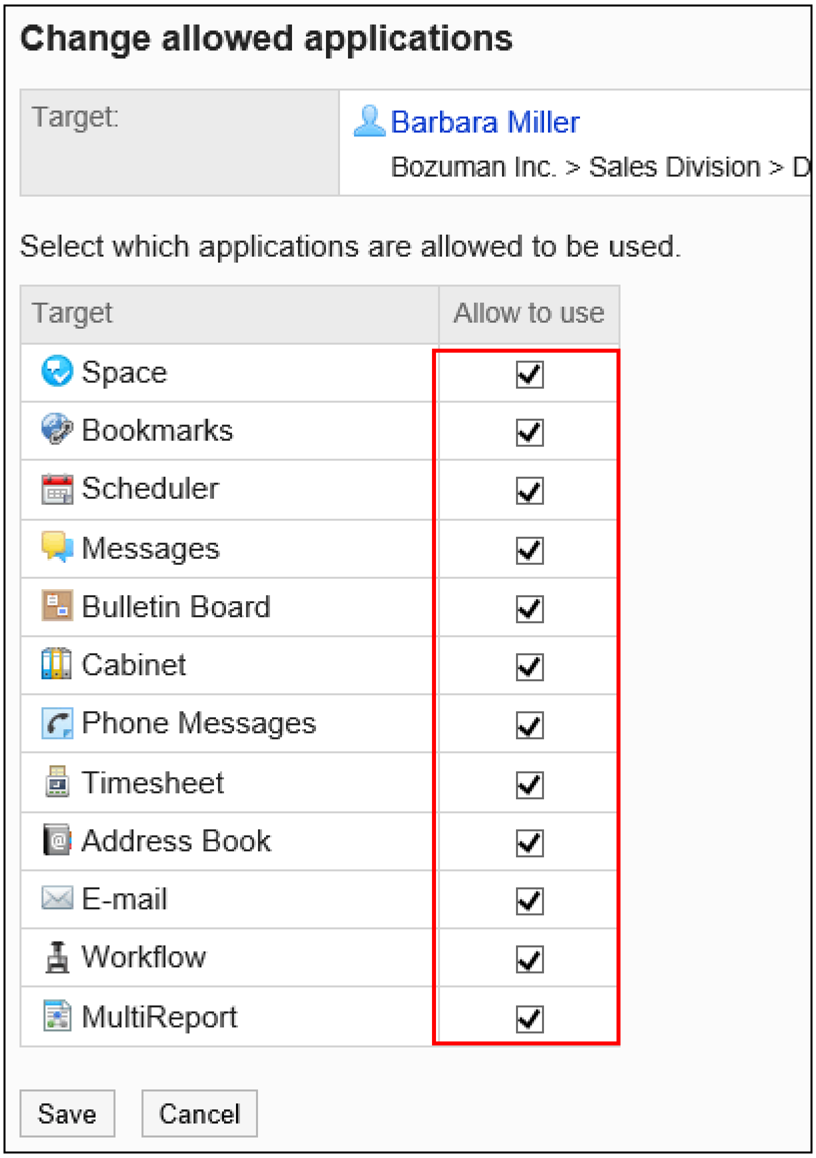
5. **Click "Application users".**

6. **On the "Application users" screen, click "Change" for the target you want to change its setting.**



7. On the "Change allowed applications" screen, change which applications are allowed to use.

If "Remote access rule" is set to "Allow all", only the "Allow to use" field is displayed. The "Allow to remote access" field is not displayed.



8. Confirm your settings, and then click "Save".

Removing Application Users

Remove organizations, users, or roles that are set as application users.

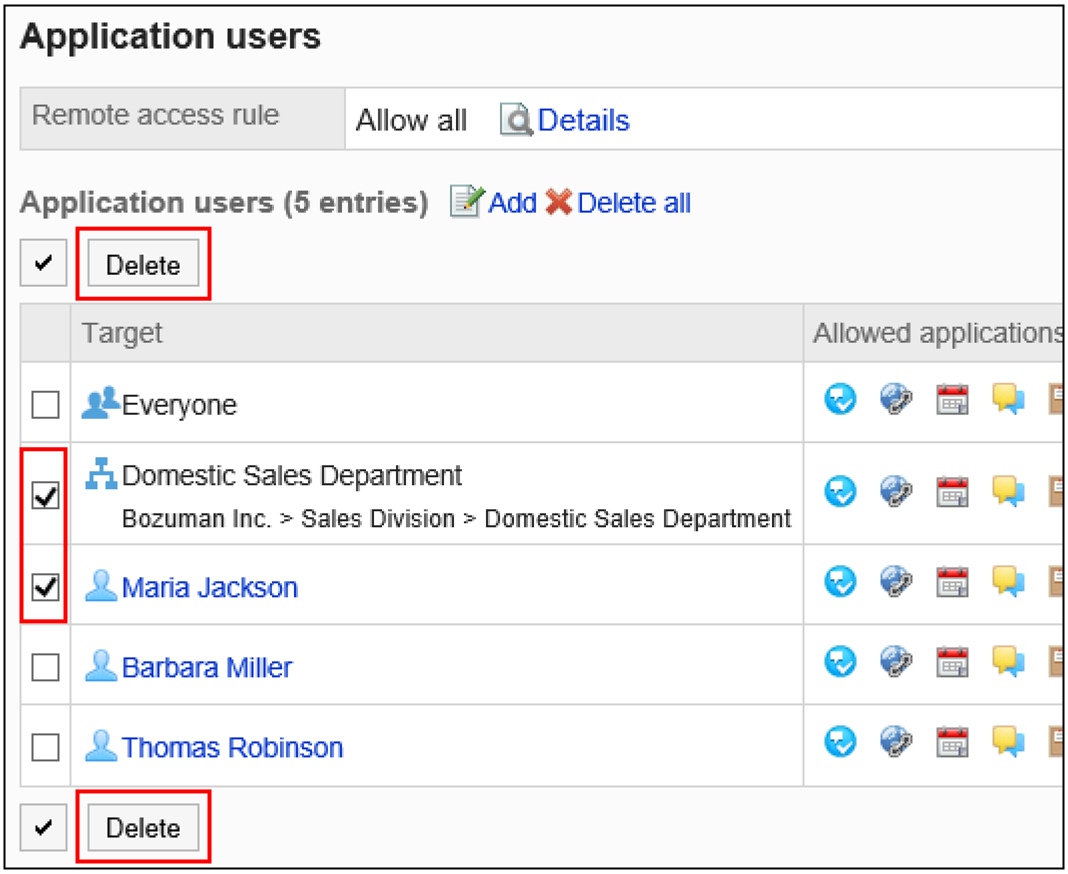
Once targets are deleted, they cannot use applications allowed to use to the targets.

Removing Multiple Users Collectively

Select application users and remove them all together.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Application".**
5. **Click "Application users".**
6. **On the "Application users" screen, select the check boxes of the organizations, users, or roles you want to remove, and then click "Delete".**



7. **Click "Yes" on the "Delete target" screen.**

Removing All Users

Remove all application users.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

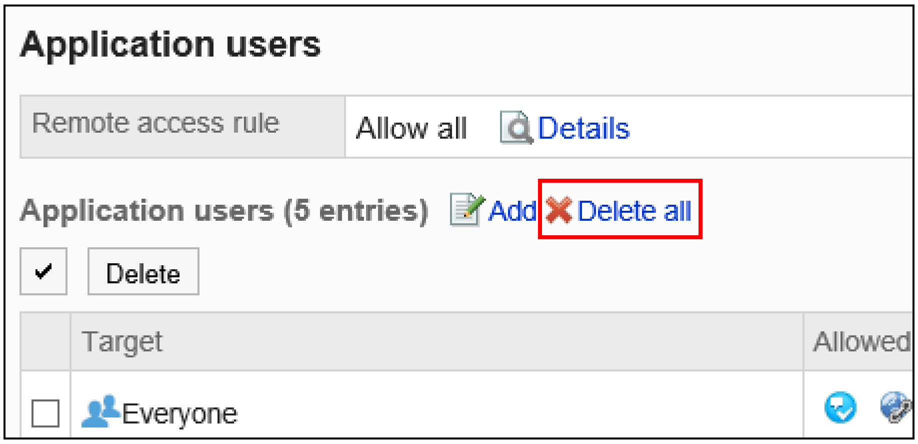
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Application".**

5. **Click "Application users".**

6. **On the "Application users" screen, click "Delete all".**



7. **On the "Delete all targets" screen, click "Yes".**

1.6.6. Remote Access Rule

You can limit which applications are available to users when they remotely access Garoon.
If user attempts to remotely access an application that is not allowed to use, that application will not be displayed and the user cannot use that application.

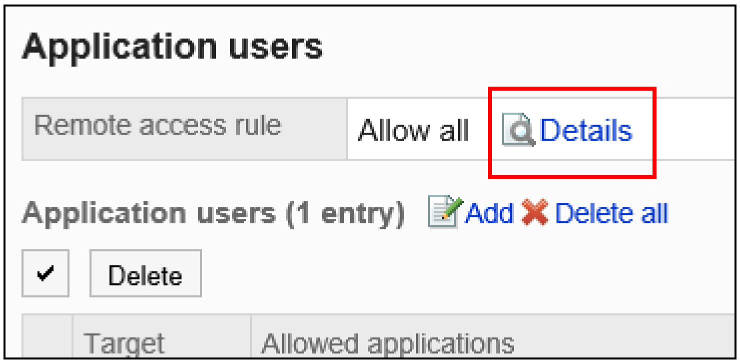
Caution

- To allow users to remotely access Garoon, you must set up security settings in users' environments. If you are concerned with taking security measures or building networks, consult specialized system integrators.

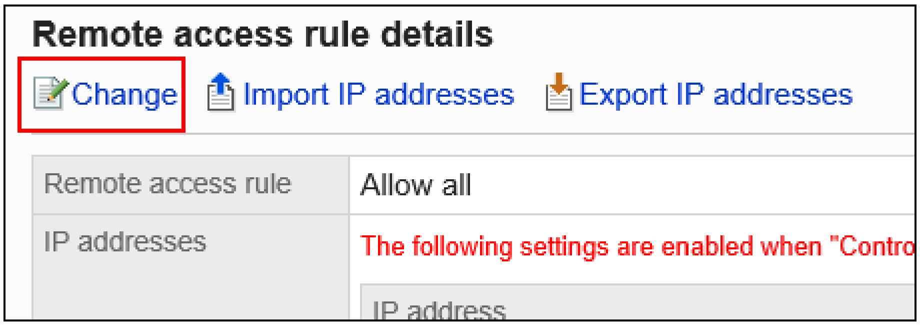
Here we describe the way to limit remotely accessible applications.
After setting the "Remote access rule", you can set applications to allow remote access.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Application".**
5. **Click "Application users".**
6. **On the "Application users" screen, click "Details" in "Remote access rule".**



7. **On the "Remote access rule details" screen, click "Change".**

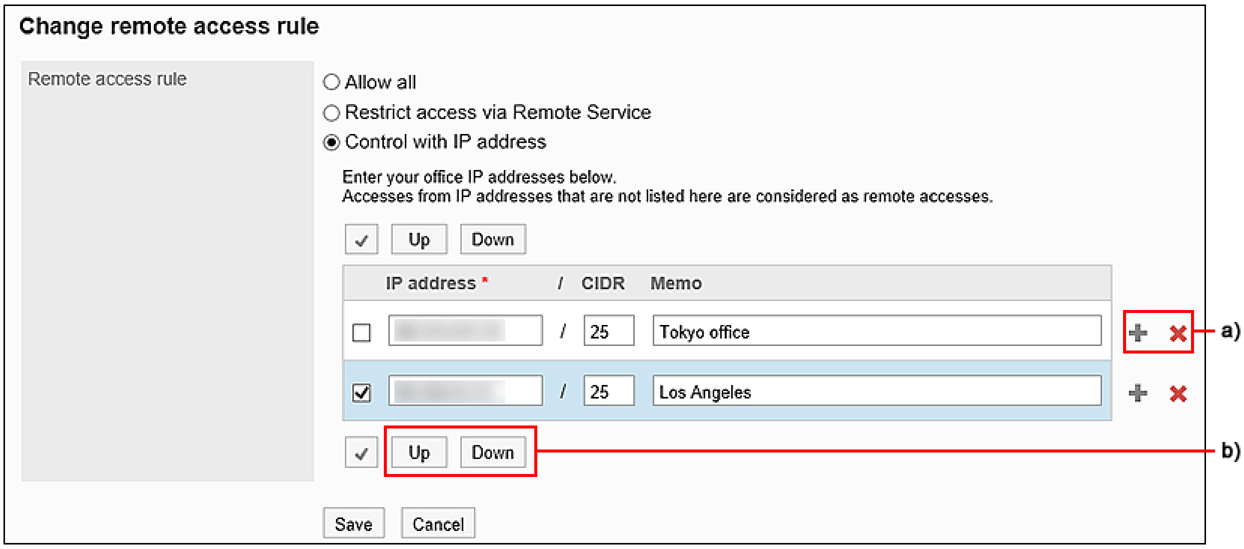


8. **On the "Change remote access rule" screen, set whether to restrict remote access.**

The setting fields are as follows:

- **Allow all:**
  The default value is "Allow all". Select this option if you do not want to limit remote access to applications.

- **Restrict access via Remote Service:**
  Select this option if accesses via remote service are considered as remote accesses and the available applications are limited.
- **Control with IP address:**
  Select this option if accesses from IP addresses that are not registered in Garoon are considered as remote accesses and the available applications are limited.
  For example, accesses from IP addresses that are listed here are considered as accesses within the office.
  A maximum of 500 IP addresses of IPv4 can be added.
  Supports both IPv4 and IPv6 addresses.
  To specify a range of IP addresses, use the CIDR notation.



A): To add multiple IP addresses, click "+" to increase the input field.

b): Select the check box and click **Up** or **Down** to reorder them.

9. Confirm your settings and click "Save".

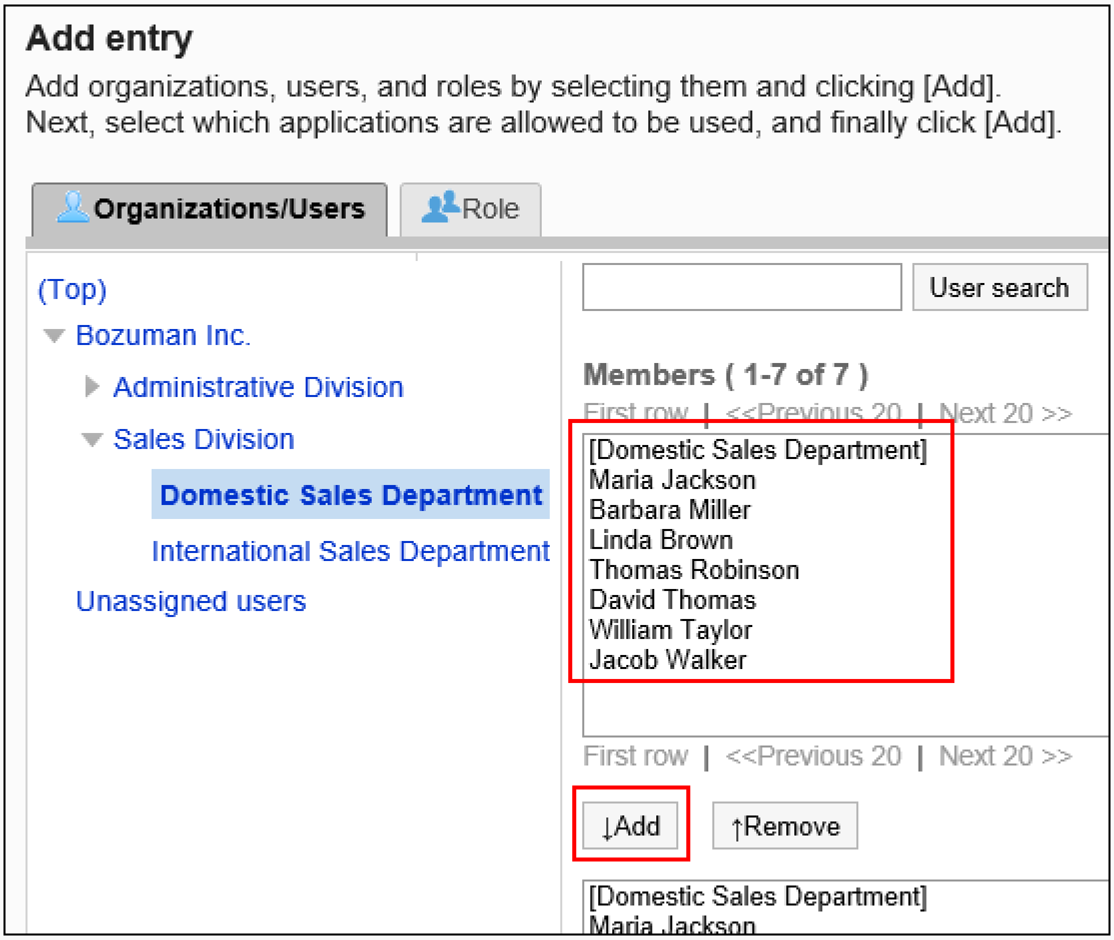
Then, set applications for which remote access is allowed.

10. Click "Application users" to set applications for which remote access is allowed.

- **If you want to add a target:**

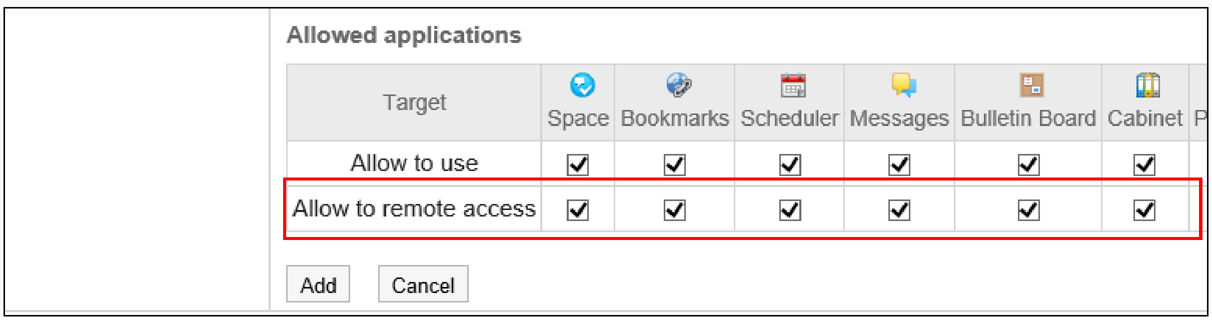
1. On the "Application users" screen, click "Add".

2. On the "Add Target" screen, select the organization, user, or role you want to add, and click "Add".



3. In the "Allow to remote access" field, select the check boxes of the applications you want to allow remote access.

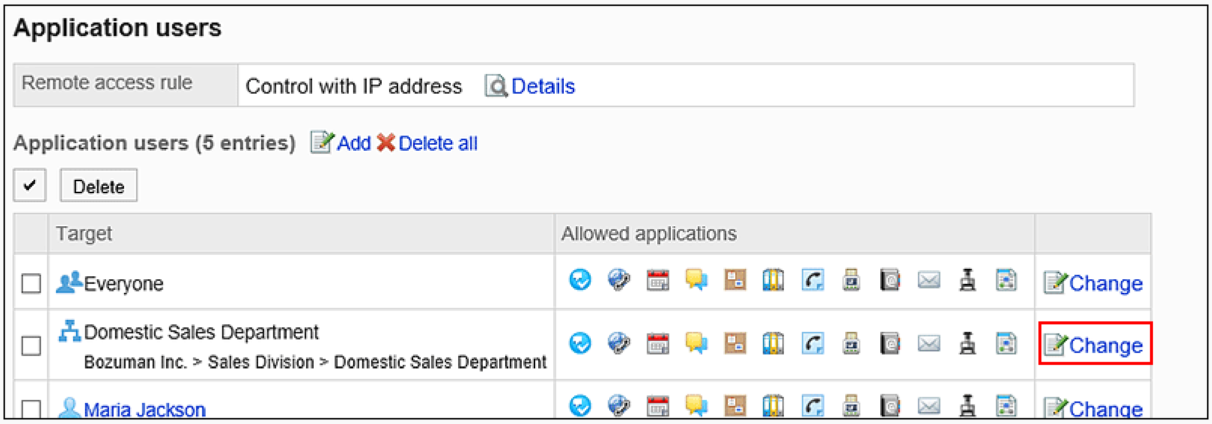
Applications that do not have their check boxes selected in the "Allow to use" field cannot be selected.



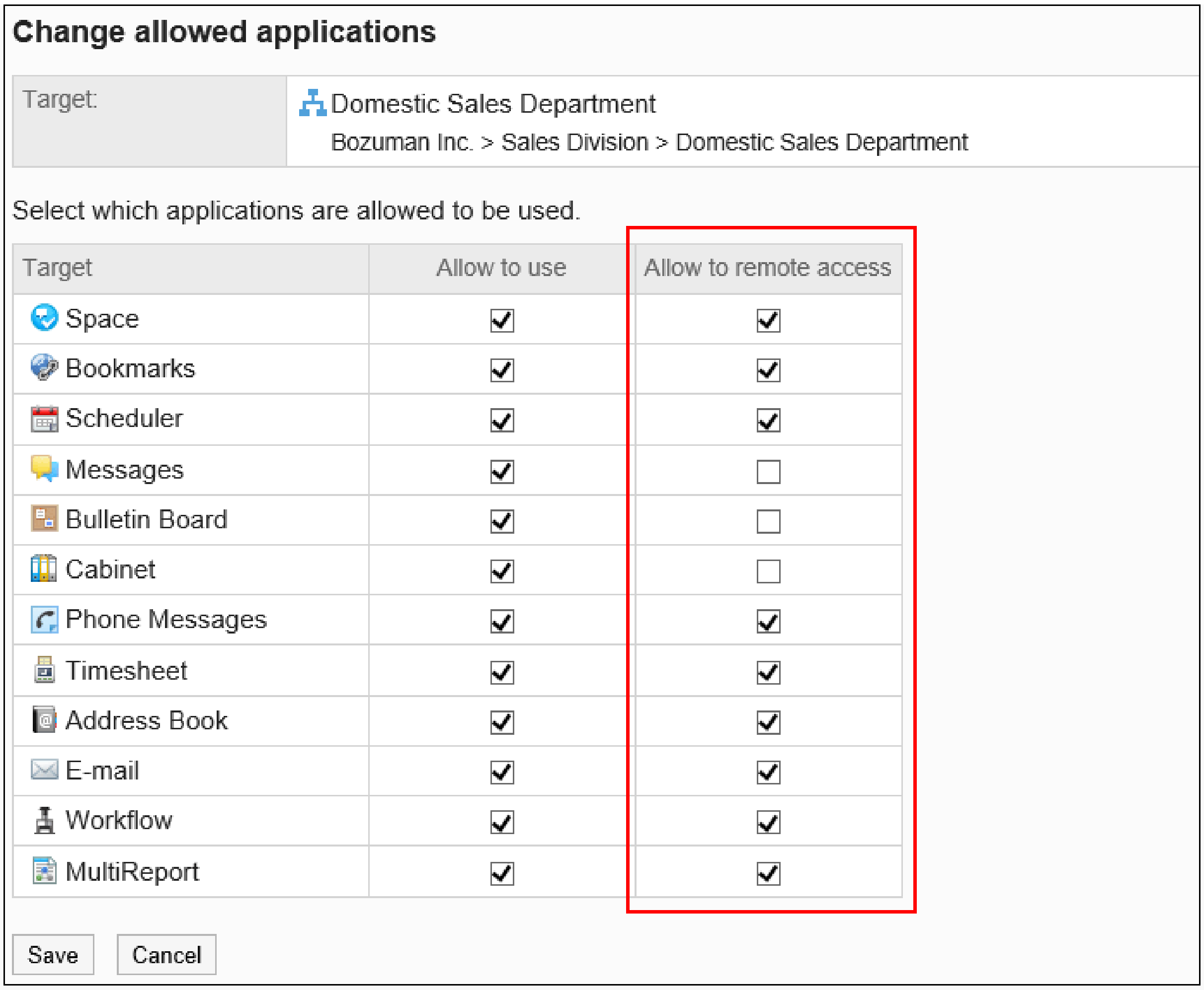
4. Confirm your settings and click "Add".

- **If you want to change the existing target settings:**

1. On the "Application users" screen, click "Change" for the target you want to change its setting.

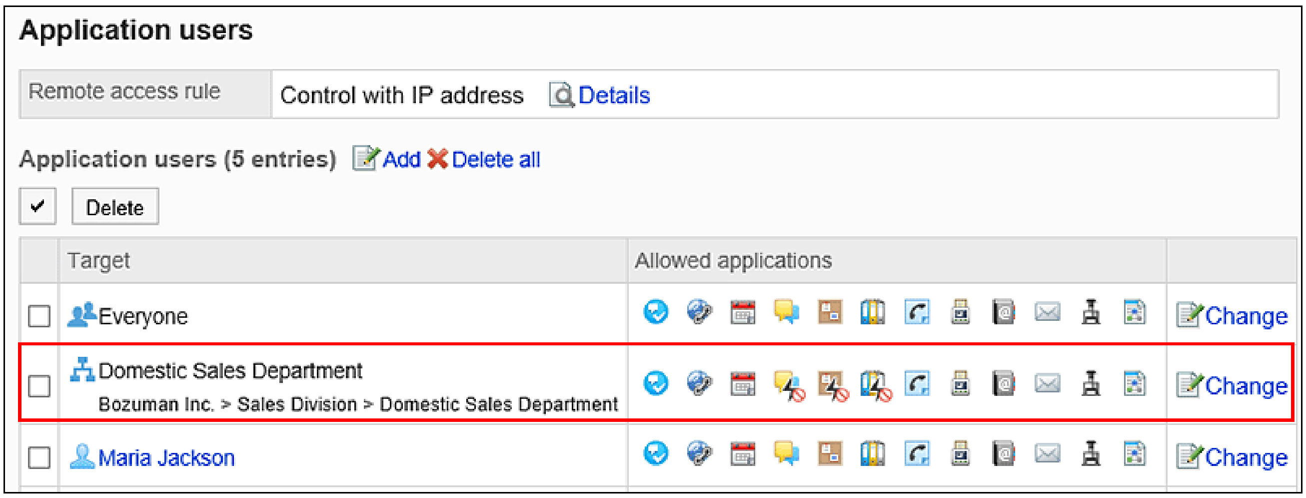


2. On the "Change allowed applications" screen, in the "Allow to remote access" field, select the check boxes of the applications you want to allow remote access.
Applications that do not have their check boxes selected in the "Allow to use" field cannot be selected.



3. Confirm your settings and click "Save".

11. On the "Application users" screen, confirm that your settings are displayed in the "Application users" list.



The icons of applications that are not allowed to remote access are displayed as follows:

Space Example: 

Note

- If you change to "Allow all", the IP addresses that you have added are not removed. The IP addresses will appear when you change to "Control with IP address".

Managing IP Addresses Using CSV Files

IP addresses to be used to control remote access are managed in a CSV file.

Importing Data from a CSV File

You can import IP addresses to be used to control remote access from the CSV file.
If any error occurs while attempting to import a CSV file, the import will stop, and the imported contents will not be applied.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed in CSV files, refer to the "IP Addresses to Be Used to Control Remote Access(1819Page)" section.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "Application".**

6. **Click "Application users".**

7. **On the "Application users" screen, click "Details" in "Remote access rule".**

8. **On the "Remote access rule details" screen, click "Import IP addresses".**

9. **On the "Import IP addresses - Step 1/2" screen, select the CSV file that you created in step 1.**

10. **Set the data to import, and click "Next".**

    You can import up to 500 items.

    Options are as follows.

    - Character encoding:
      Encodes data from a CSV file with the selected character code.
      The following character encoding can be selected:
        - Unicode (UTF-8)
        - Japanese (Shift-JIS)
        - ASCII
        - Latin1 (ISO-8859-1)
        - Simplified Chinese (GB2312)
        - Thai (TIS-620)
    - Skip the first row:
      If the header row contains information other than data such as an item name and a comment, select "Yes".

11. **On the "Import IP addresses - Step 2/2" screen, check the contents of the CSV file, and click "Import".**

Exporting Data to a CSV File

You can export IP addresses to be used to control remote access to the CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Application".**

5. **Click "Application users".**

6. **On the "Application users" screen, click "Details" in "Remote access rule".**

7. **On the "Remote access rule details" screen, click "Export IP addresses".**

8. **On the "Export IP addresses" screen, set the required items for the data to be exported.**

The setting fields are as follows:

- Character encoding:

  Select the character code that you want to use for encoding.

  Following character codes can be selected.

  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".

9. **Confirm your settings and click "Export".**

10. **Save the file with a function provided by your Web browser.**

1.6.7. Managing Users Using CSV Files

Manage application user settings using a CSV file.

Importing Data from a CSV File

Import application users settings from a CSV file.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed in CSV files, refer to the "Application users(1817Page)" section.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "Application".**

6. **Click "Import application users".**

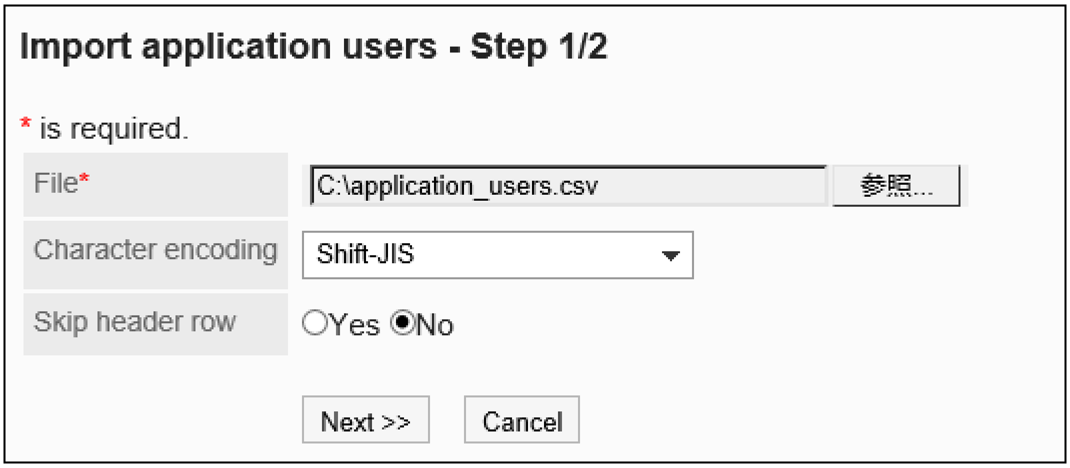
7. **On the "Import application users - Step 1/2" screen, select the CSV file that you created in Step 1.**

8. **Set the data to import, and click "Next".**

   The setting fields are as follows:
   - Character encoding:
     Encodes data from a CSV file with the selected character code.
     The following character encoding can be selected:

  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



9. **On the "Import application users - Step 2/2" screen, check the contents of the CSV file, and then click "Import".**

Exporting Data to a CSV File

Export application users settings to a CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Application".**
5. **Click "Export application users".**

6. On the "Export application users" screen, set the required items for the data to be exported.

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  Following character codes can be selected.
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".

7. Confirm your settings and click "Export".

8. Save the file with a function provided by your Web browser.

1.7. File

This section describes the settings for files that are handled in Garoon.

References

- Is there a limit to the size of files that can be uploaded?
- Cannot download a single-byte space or a "+" file.
- Cannot upload 30 MB files.

1.7.1. General Settings for Files

On the "General Settings" page of a file, you can set files that are common to each application.

Setting File Size Limitations

Limit the size per file to allow uploading to garoon.

Applies to the following applications and functions

- Space
- Scheduler
- Messages
- Bulletin Board
- Cabinet
- Memo
- Address Book
- Workflow
- MultiReport
- Application Menu:

  This size limit is also applied to the image file used for the icon in the Application menu.

  For details, refer to Application Menu settings(259Page).
- User profile

Caution

- The file size limit of e-mail attachment varies depending on the e-mail size settings.
  For details, refer to Setting e-mail size limits(1205Page).

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "File".**
5. **Click "General Settings".**
6. **In the "File size limit" field on the "General Settings" screen, select a limit for the size per file.**
   The available file size limits are as follows
   - 512KB
   - 1MB
   - 3MB
   - 5MB
   - 10MB
   - 50MB
   - 100MB
   - 1024MB
7. **Confirm your settings and click "Save".**

Setting the Maximum Value for Versioning

Set the maximum number of generations for which you want to version a file.

Applies to the following applications.

- Scheduler
- Space
- Bulletin Board

- Cabinet
- Messages
- MultiReport
- Memo

What Is Versioning?

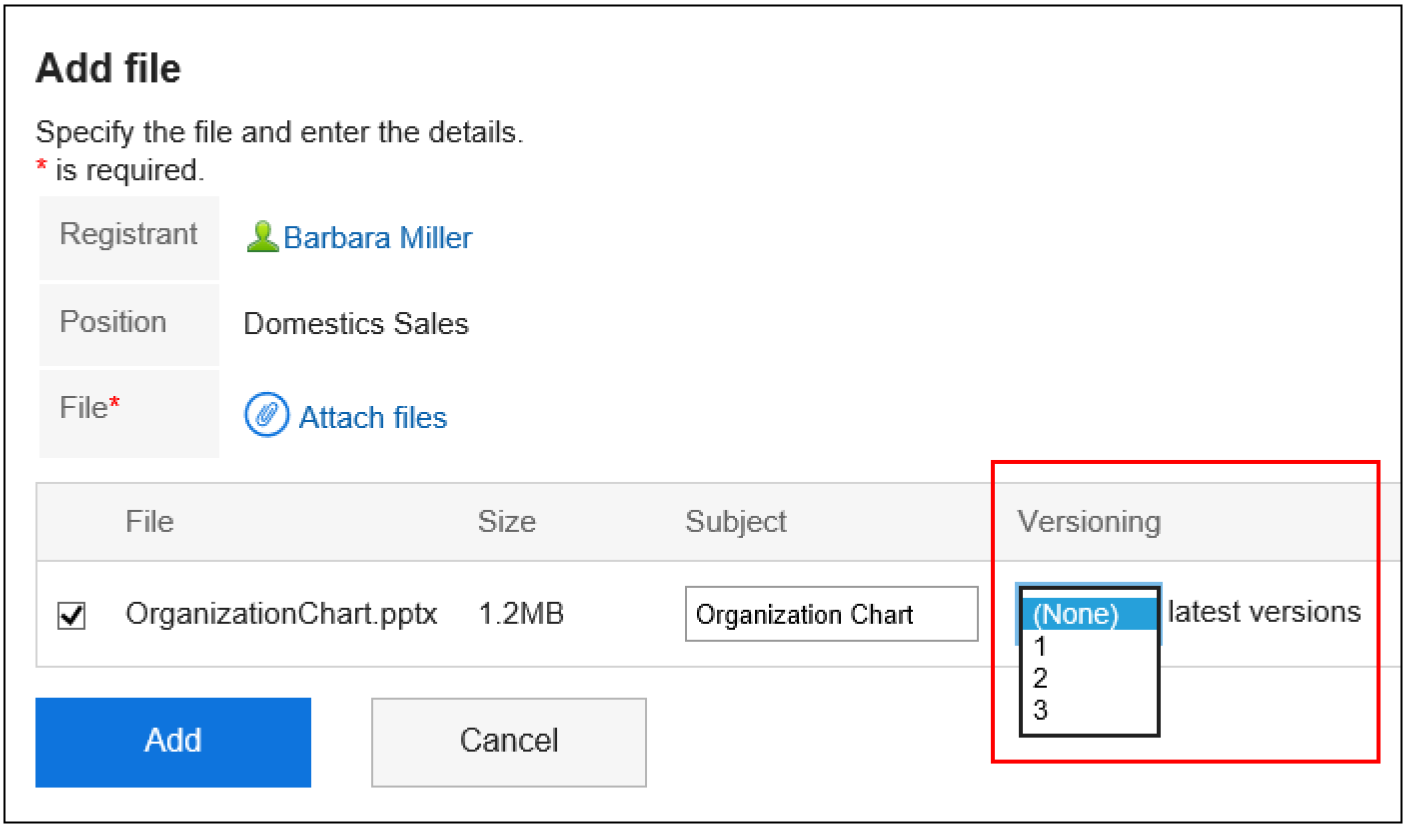
Versioning is a feature to hold updated files from the current point of time.

If an updated file is corrupted, or if you update the file incorrectly, you can replace the file with the earlier version you want.

The files to be kept in version control are set in generational increments. The number of generations to be set is set when each user registers a file.

For example, if you have two generations of versioning, you can keep the updated files from "current/current to one before/from the current time".

When a new file is updated, older files that are larger than the specified generation will be deleted.



Available operations when the versioning feature is enabled

- Download files that you have stored in the past
- Update retained files as up-to-date files

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "File".

5. Click "General Settings".

6. On the "General settings" screen, in the "Upper limit for versioning" field, select the number of generations to be versioned.

The number of generations you can select is as follows

- Not
- 1 - 10
- Unlimited

7. Confirm your settings and click "Save".

Enabling the Locking Feature

Select whether to enable the lock feature.

Applies to the following applications.

- Bulletin Board
- Cabinet
- MultiReport

Note

- The locking feature for Messages is always enabled, regardless of whether the locking feature for Files is enabled or not.

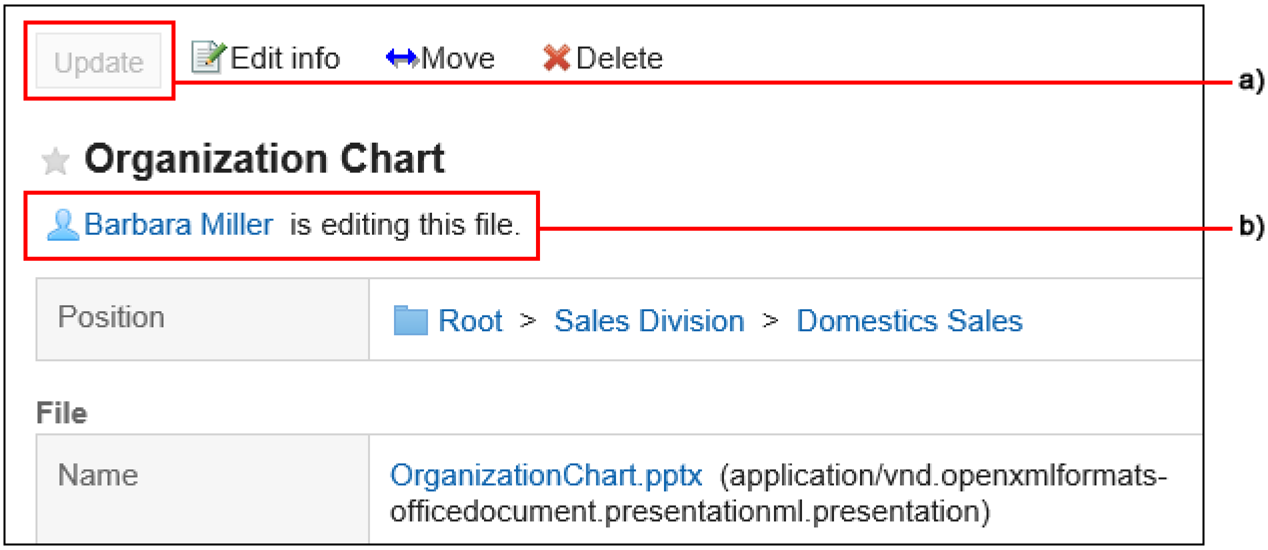
What Is the Locking Feature?

The lock feature is a feature that temporarily restricts editing permissions to only the file editor, so that other users cannot edit the file at the same time.

When other users view the active file, the file is being edited by the user name on the screen. is displayed in the user's "E-mail" screen.

Other users cannot do the following until the lock is released

- Changing File Information
- Updating, moving, and deleting files



a): The "Update Files" field is grayed out and cannot be clicked during the lock.

b): Displays the name of the user who is editing the file.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "File".**
5. **Click "General Settings".**
6. **On the "General settings" screen, on the "Lock function" field, select the "Use" check box.**
7. **Confirm your settings and click "Save".**

Setting the Period for Locking

Set the period for which you want to lock the file you are editing. This setting is applied when the locking feature is enabled.

After the period of locking is applied, the lock is automatically unlocked.

Applies to the following applications.

- Bulletin Board
- Cabinet

- Messages
- MultiReport

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "File".**

5. **Click "General Settings".**

6. **In the "Locking period" field on the "General Settings" screen, select the period for which you want to lock the file you are editing.**
   The available periods are as follows
   - 30 minutes
   - 1 hour
   - 3 hours
   - 5 hours
   - One day
   - Unlimited

7. **Confirm your settings and click "Save".**

1.7.2. MIME Type Settings

Set the MIME type for each file extension.
The MIME type is a method that represents the format of data in "type name/subtype name" strings. This is used to determine how a Web browser processes files on Garoon.
The following MIME types are specified in default settings

Extension	MIME Type
bmp	image/bmp
csv	text/csv
doc	application/msword
docm	application/vnd.ms-word.document.macroEnabled.12
docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document
exe	application/x-msdownload
gif	image/gif
htm	text/html
html	text/html
jpe	image/jpeg
jpeg	image/jpeg
jpg	image/jpeg
mid	audio/midi
mp3	audio/mpeg
mpeg	video/mpeg
pdf	application/pdf
png	image/png
ppt	application/vnd.ms-powerpoint
pptm	application/vnd.ms-powerpoint.presentation.macroEnabled.12
pptx	application/vnd.openxmlformats-officedocument.presentationml.presentation
ram	audio/x-pn-realaudio

Extension	MIME Type
tif	image/tif
tiff	image/tiff
txt	text/plain
wav	audio/x-wav
xls	application/vnd.ms-excel
xlsm	application/vnd.ms-excel.sheet.macroEnabled.12
xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet
xml	text/xml
xsl	text/xml
zip	application/x-zip-compressed

Note

- If you do not set the MIME type, when you download a file attached to Garoon, the extension may be saved from the original extension.
  For details, refer to the extension changes when downloading attachments in frequently asked questions.
- In version 5.9.0, additional MIME type with ".csv" extension is added to the default setting.
  If you configured MIME type with ".csv" extension before version 5.9.0, the setting will be inherited.

Adding MIME Types

Add MIME Type Association.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "File".**

5. **Click MIME type.**

6. **On the "MIME type" screen, click "Add MIME Type".**

7. **On the "Add MIME Type" screen, set the extension and MIME type.**

The extension and MIME type must be set.

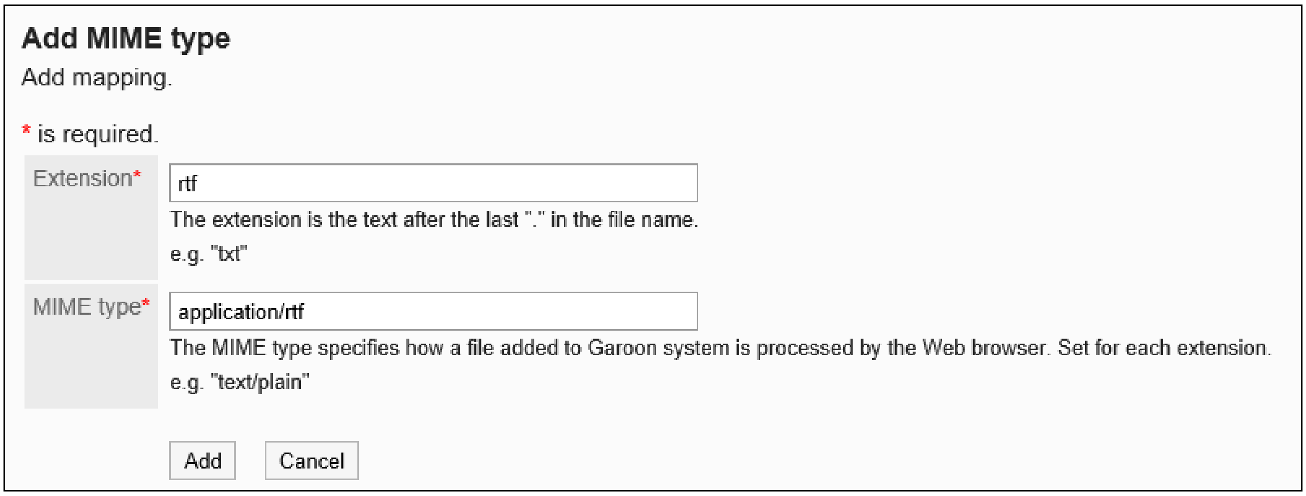
- Extension:

  Enter the file extension associated with the MIME type.

  「.」 (Dot) is not required.

- MIME type

  In the type name/subtype name string, specify the application that you want to associate with the MIME type.



8. **Confirm your settings and click "Add".**

Changing MIME Types

Change the MIME type associated with the extension.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "File".**
5. **Click MIME type.**
6. **On the "MIME type" screen, click the extension for the MIME type you want to change.**
7. **On the "MIME type Details" screen, click "Edit".**

8. **On the "Change MIME type" screen, change the MIME type associated with the extension.**
9. **Confirm your settings and click "Save".**

Deleting MIME Types

Delete the MIME type.

Caution

- The deleted MIME type cannot be restored.
- If you download a file with an extension that has been associated with the deleted MIME type, the file may be saved as a different extension.

Delete MIME Types One by One

Delete the MIME type by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "File".**
5. **Click MIME type.**
6. **On the MIME type screen, click the extension for the MIME type you want to delete.**
7. **On the "MIME type Details" screen, click "Delete".**

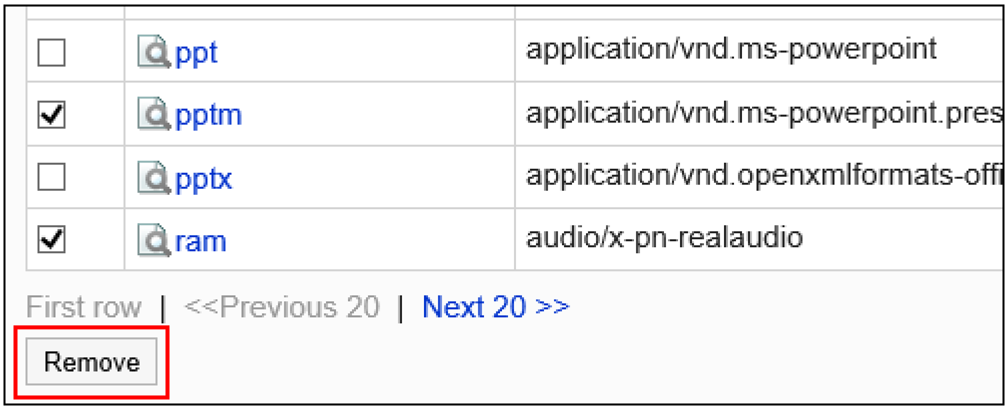
8. **Click "Yes" on the "delete MIME type" screen.**

Deleting Multiple MIME Types in Bulk

Select the MIME type you want to delete, and delete it all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "File".**
5. **Click MIME type.**
6. **On the MIME type screen, select the check box for the MIME type you want to delete, and then click "Delete".**



7. **Click "Yes" on the "delete all MIME types" screen.**

Deleting All MIME Types

Delete all MIME types.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "File".**

5. **Click MIME type.**

6. **On the MIME type screen, click Delete all MIME types.**

7. **Click "Yes" on the "delete all MIME types" screen.**

1.7.3. Managing MIME Types Usingin CSV File

Manages the MIME type in a CSV file.

Importing Data from a CSV File

Import the MIME type from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on the CSV file, refer to the MIME type(1820Page) CSV format.

2. **Click the Administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "File".**

6. **Click Import MIME Type.**

7. **In the "Import MIME Type - Step 1/2" screen, select the CSV file that you created in step 1.**

8. **Set the required items for the data to import, and then click "Next".**

   The setting fields are as follows:

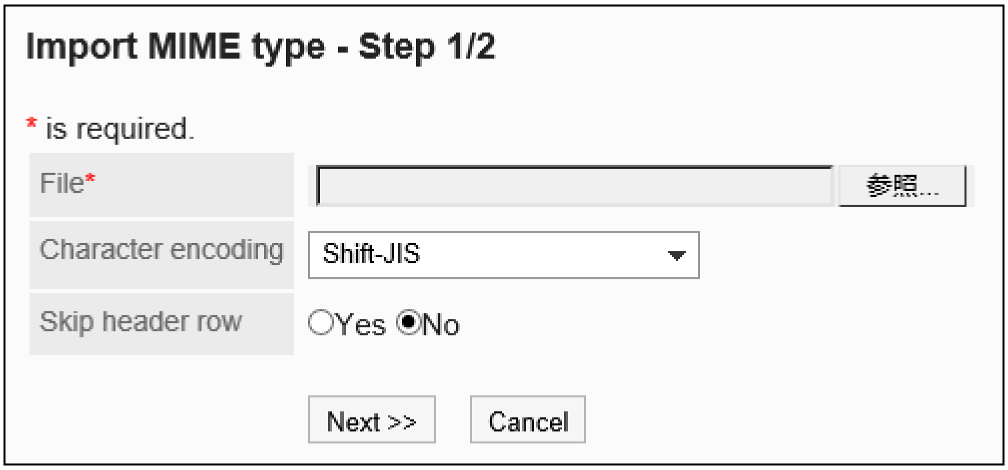
   - Character encoding:

     Encodes data from a CSV file with the selected character code.

     The following character encoding can be selected:

     - Unicode (UTF-8)
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)

- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



9. In the "Import MIME Type - Step 2/2" screen, confirm the contents of the CSV file, and then click "Import".

Exporting Data to a CSV File

Export the MIME type to a CSV file.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "File".

5. Click Export MIME type.

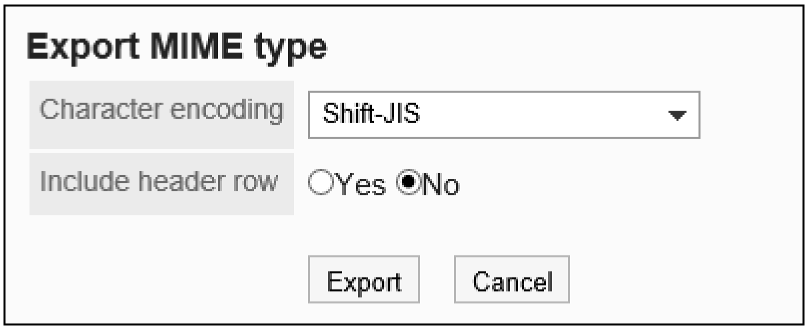
6. On the "Export MIME type" screen, set the required items for the exported data.

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  The following character encoding can be selected:
  - Unicode (UTF-8)
    You can select with BOM as required.

- Japanese (Shift-JIS)
- ASCII
- Latin1 (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)

- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".



7. Confirm your settings and click "Export".

8. Save the file with a function provided by your Web browser.

1.8. Screens

This section describes the screen functions of Garoon.

References

- General settings of Screen(248Page)
- Design Settings(257Page)

• Configuring Application Menu(259Page)

1.8.1. General Settings for Screens

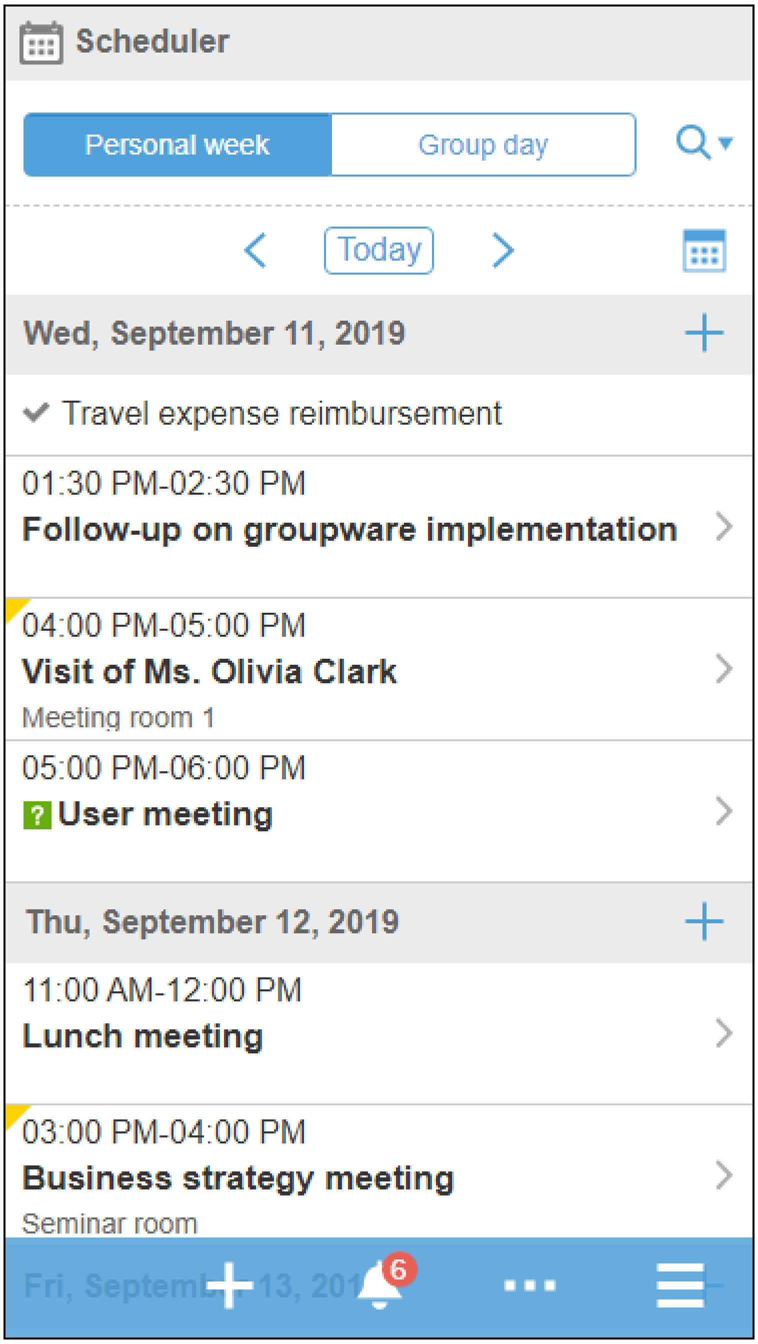
On the "General settings" for screens, you can set settings related to user actions screens, such as setting up mobile view and thumbnail view, setting the number of items to be displayed in the list, and width of input fields.

Common Settings

This section describes "Common settings" in "General settings" screen.
Users cannot change the configurations in "Common settings".

Allowing Mobile View

Select whether to allow users to use the mobile view (smartphone view).
The smartphone view supports iOS and Android OS.



If you allow users to use the mobile view, the following applications can be manipulated on screens suitable for smartphones.

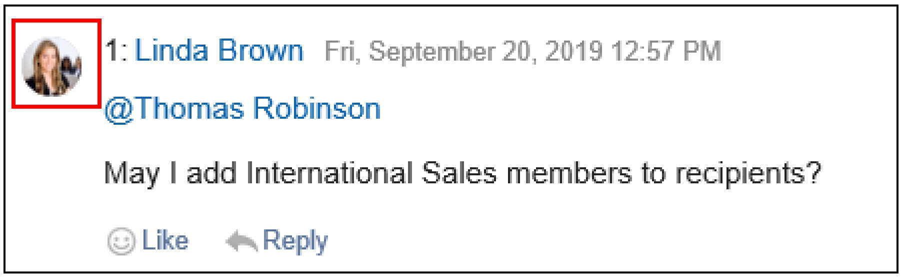
- Space
- Scheduler
- Messages
- Bulletin Board
- E-mail
- Workflow
- MultiReport
- Notifications

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Screen".**
5. **Click "General Settings".**
6. **In the "Common settings" field on the "General Settings" screen, select the the check box to allow mobile view.**
7. **Confirm your settings and click "Save".**

Allowing to Show Profile Pictures

Allow users to select whether to show their profile pictures.
If allowed, users can select whether to show their profile pictures in comments and User list.
If not allowed, default user icons are always used.



The image set as a user profile will appear as a user icon in the following screens.

- Comments for the following applications
  - Space
    - Discussions
    - Shared To-Dos
  - Scheduler
  - Messages
  - Bulletin Board
  - MultiReport
- Scheduler
  - Group week
  - Group day
  - Group week view portlet

- Group day view portlet
- User/facility search results

- Address Book
  - Users
  - Search results in the user list
- User list
- Phone Messages

Note

- If the "Profile pictures" setting is disabled, profile pictures are not displayed even if users select "Show profile pictures in comments and User list" in their personal settings.
  For permissions to change the pictures in the personal settings, refer to Show Application Menu.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Screen".**
5. **Click "General Settings".**
6. **In the "Common settings" field on the "General Settings" screen, select the the check box to allow showing profile images.**
7. **Confirm your settings and click "Save".**

Allowing to Show Thumbnail Images

Thumbnail images are applied when both of the following conditions are met.

- The "Enable" check box is selected in the item for thumbnail image in general settings.
- The "Show image with body text" check box is selected in "Image file (gif, jpeg, etc.)" in the general settings.

When the thumbnail image is applied, the attached images in the following applications are displayed in a smaller size.

- Scheduler
- Messages
- Bulletin Board
- E-mail
- Space
  Images attached in Space are always displayed in reduced size.

Note

- Images that are 450 x 450 pixels or smaller are always displayed in their original size.
- If an animated .gif file is attached, it is displayed as a static image.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Screen".**
5. **Click "General Settings".**
6. **In the "Common settings" field on the "General Settings" screen, select the the check box to allow thumbnail images.**
7. **Select the "Show image with body text" in "Image file (gif, jpeg, etc.)" in the default value in personal settings.**
8. **Confirm your settings and click "Save".**

Default Values for Personal Settings

This section describes the default values for personal settings on the "General Settings" page.
In default values in personal settings, you can set the default value of each item on the "General settings" screen of the personal settings screen.

Users can optionally configure the default values that are set by the system administrator in the fields for default values of personal settings. The number of displays and the width of the input field in the personal settings are also applied to the system administration screen.

The default value will be applied to users who have been added after the change is made. The changes are not applied to existing users.
However, if you configure values by selecting "Apply to all users" check box, you can apply those default values to all users (including existing users) in bulk.
Default values which are configured with selecting "Apply to all users" check box are applied when users logout and login again.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

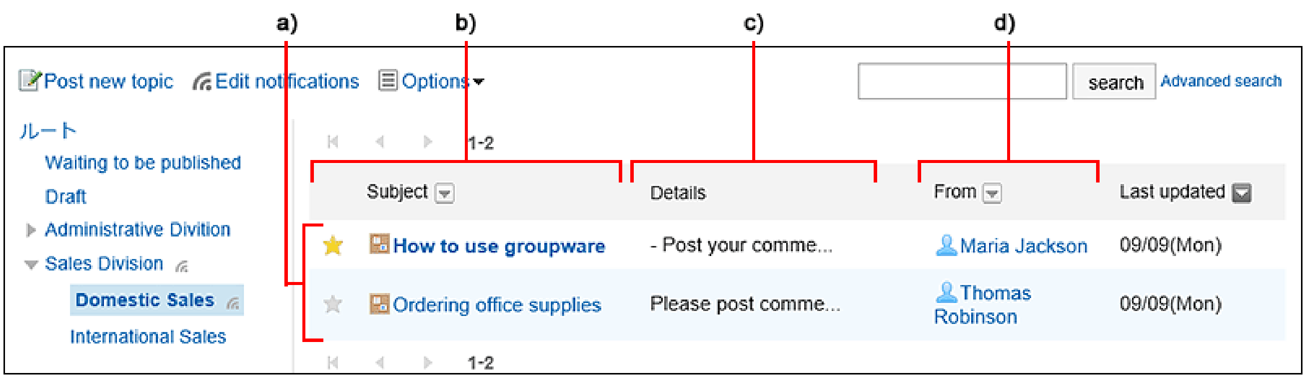
3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click "General Settings".**

6. **Configure the Display field.**

Example of configuring a display field on the Bulletin Board screen



a): Number of items to be displayed on the list screen

b): Width to display subjects

c): Width to display excerpts from body text and comments

d): Width to display from/to recipients

- **Number of items to be displayed on the list screen:**
  From the drop-down list, select how many items are displayed on the list screen such as messages and bulletin board.
- **Number of comments displayed in the list of comments:**
  From the drop-down list, select how many items to display on the details screen of messages and bulletin board.
- **Width to display subject:**
  Select the width to display the subject from the drop-down. The width is the number of characters in single-byte.
  This setting is not applicable for the "Notifications" portlet which uses "Multi-line layout".
- **Width to display excerpts from body text and comments:**
  Select the width to display the body text and comments from the drop-down. The width is the number of characters in single-byte.
  This setting is not applicable for the "Notifications" portlet which uses "Multi-line layout".
- **Width to display from/to recipients:**
  Select the width to display the from/to recipients from the drop-down. The width is the number of characters in single-byte.
- **Destination applications for e-mail addresses:**
  Select the application or screen you want to start when you click the link of an e-mail address that is included in the body and comment.
  - Start the e-mail program in the Web browser (mailto: link):
    The e-mail program associated with the settings of the Web browser starts.
  - Start the E-mail:
    The "Compose E-mail" screen of Garoon is displayed.
  - Display any Web mail screen:
    From the preconfigured Web mail, select the target application.
    You can add target applications in the item for setting Web mails. For details, see Configuring Web Mails(270Page).
- **Image files (gif, jpeg, etc.):**

When you select the "Show with body text" check box, the image files attached to messages and topics are displayed with the body text and comments. If you want to allow thumbnail images, make sure to select the "Show image with body text" check box.

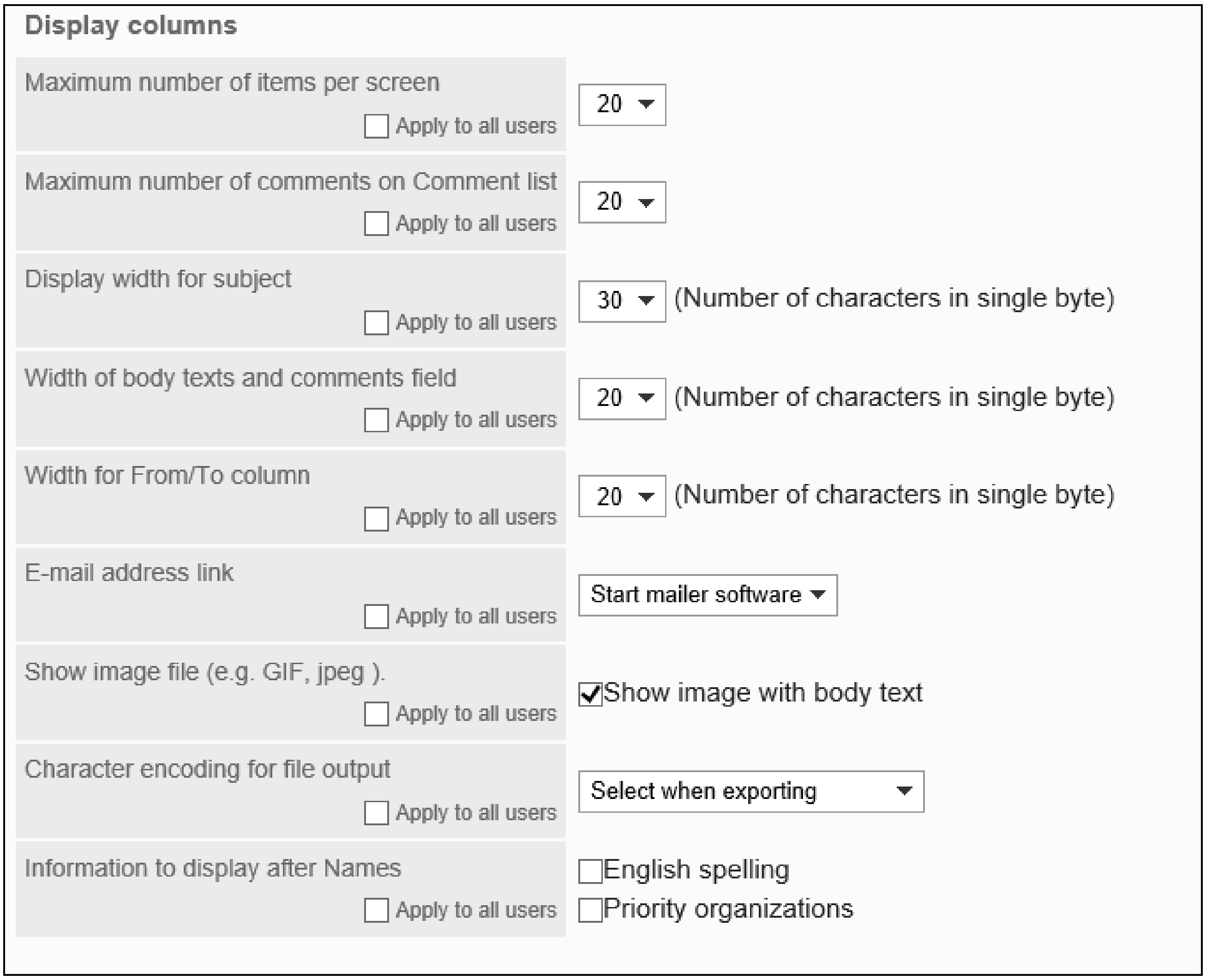
The image file is displayed as a smaller image. You can display image files in the following formats.

- gif
- jpeg
- pjpeg
- png

- **Character encoding to export to files:**
  Select a character encoding to use for exporting messages, bulletin board, notes, or e-mails to a text file from the drop-down list.
  The following items can be selected:
  - Select on exporting
    When you export a file, you can select a character encoding.
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCIILatin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- **Information to display after user name:**
  After the user name, select whether to display the name in other languages and priority organization.
  If no information has been configured, only the user name that has been set to "Standard" in name of the user information is displayed.
  - English Name:
    Configure to display the English name after the name of the user.
    "English Name" is the name specified in the English spelling field in the Name section on the User details screen.

- Priority organization:

  Configure to display the priority organization name after the name of the user.



7. Configure the input field.

The following items can be configured for the input field.

- Width of input field for body:

  From the drop-down list, select the width of input field for body text of messages and bulletin board. The width is the number of characters in single-byte.

This setting is not applied to the width of the body of the "E-mail" screen.

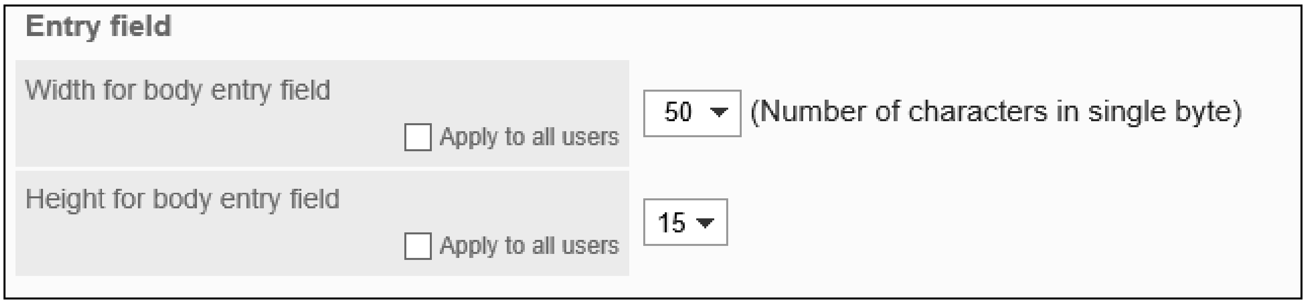
In Garoon version 5.5.0 or later, they are not applied to contents in HTML portlets or PHP portlets.

- Height of input field for body:

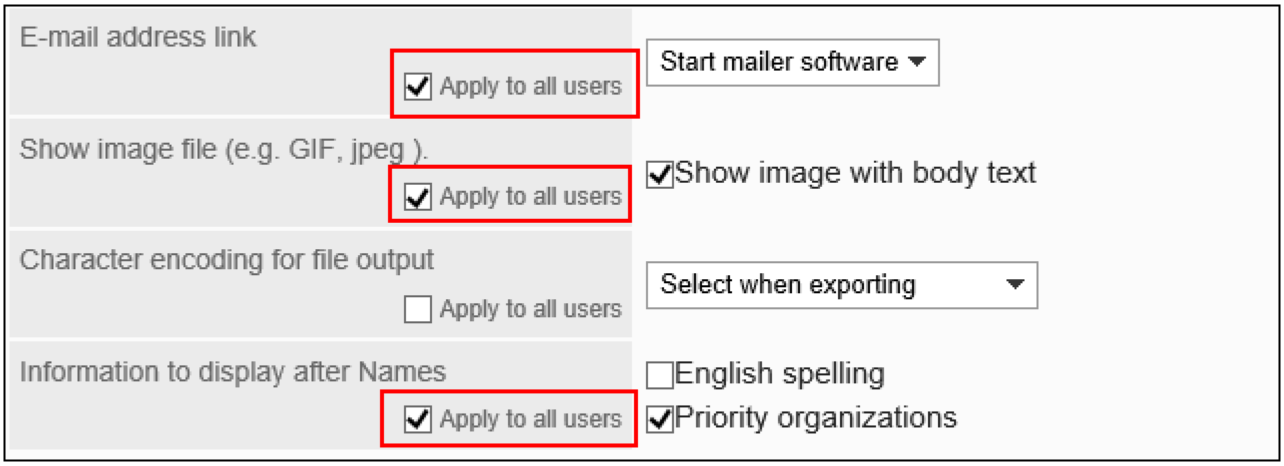
  From the drop-down list, select the height of input field for body text of messages and bulletin board.

  The height is the number of lines.

  This setting is not applied to the width of the body of the "E-mail" screen.



8. **If you want to apply settings to all users in bulk, select "Apply to all users" check box.**



9. **Confirm your settings and click "Save".**

If you have selected the "Apply to all users" check box, confirm the settings in the Apply All Settings screen, and then click "Yes".

1.8.2. Design Settings

You can configure the default value for the design of the user screen.

The settings will be applied to the default values of users who have been added after you have configured it.

Users can change the default value set by the administrator in "Common settings" in "Personal settings", in "Design settings" of "Screen".

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

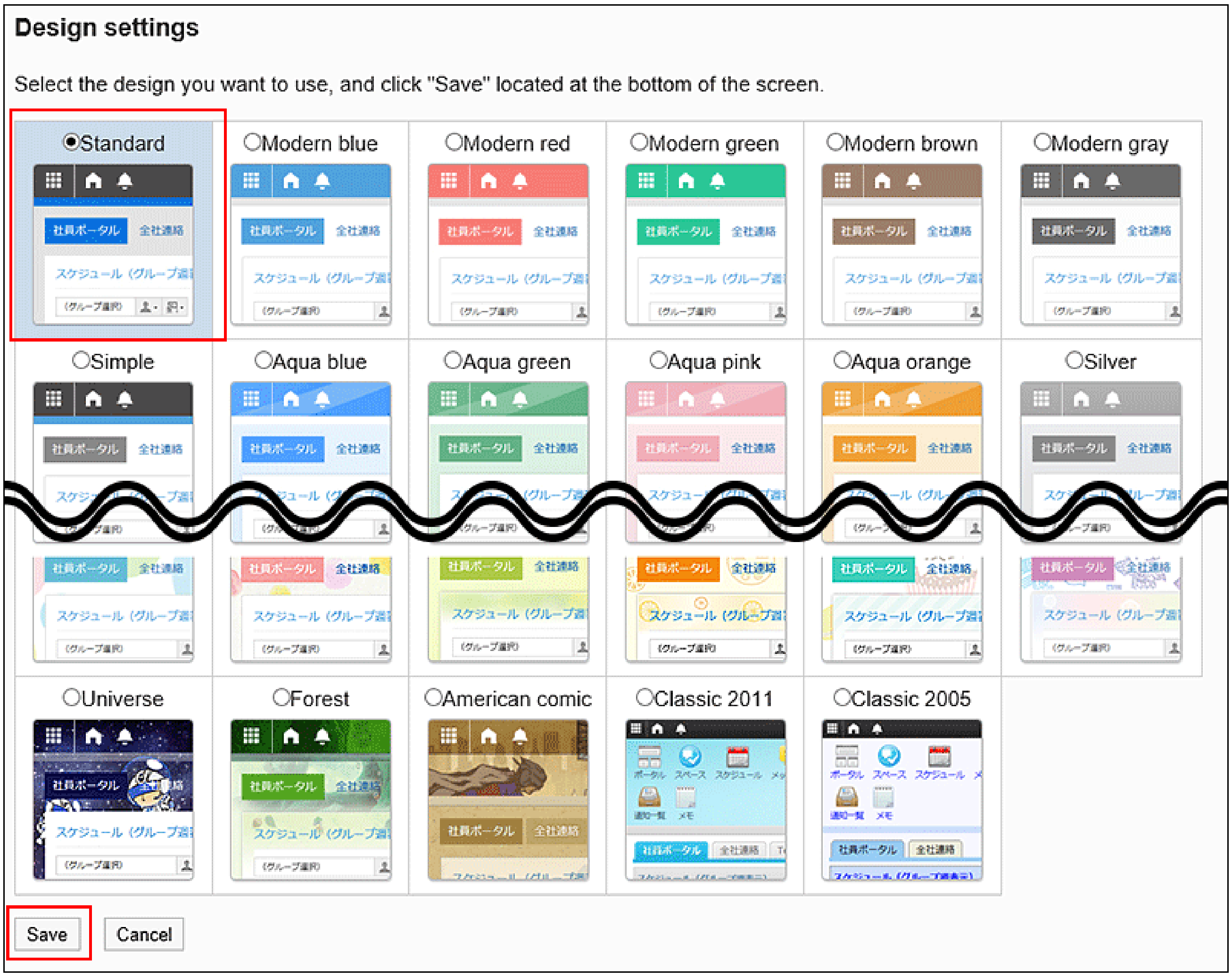
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click "Design Settings".**

6. **On the "Design Settings" screen, select the design you want to set, and click "Save".**

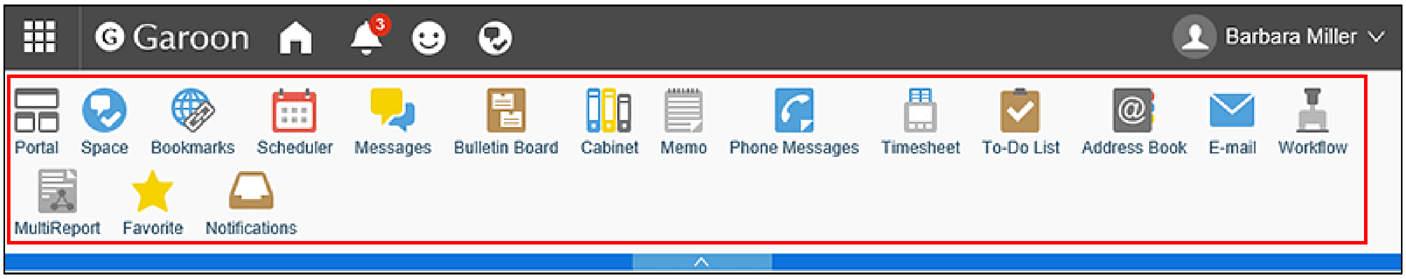


Note

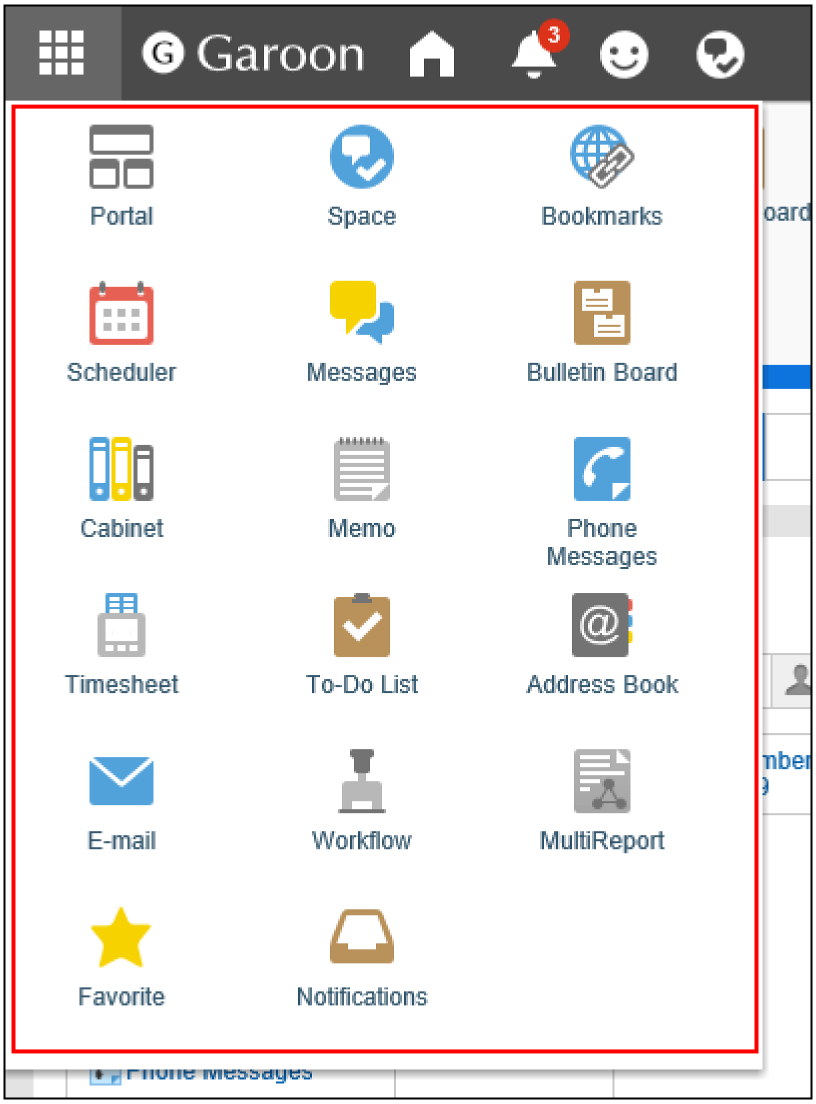
- You can change the size of the portlet text by using "Portlet settings" in each portlet.
  For details, refer to Portlet Types and Settings(722Page).
- You can change the number of messages displayed, the number of items listed on the bulletin board, and the default values of display settings such as the width of the input field in the text body.
  For details, refer to Default Values for Personal Settings(252Page).

1.8.3. Configuring Application Menu

You can configure the application menu on the user screen.
The default is to display all menus for available applications.



The application menu settings also apply to the menu that appears by clicking the app icon  in the header.



Changing Application Menu Display Settings

You can change the format of the Application menu.

However, the configuration will not be applied to the menu shown by clicking the app icon  in the header.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

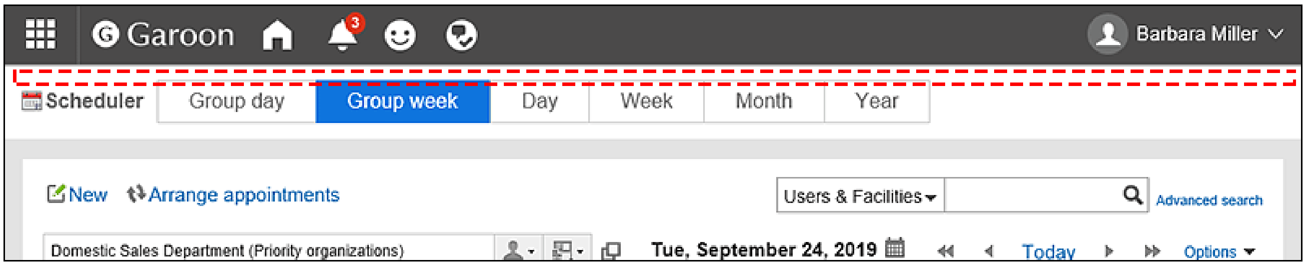
3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

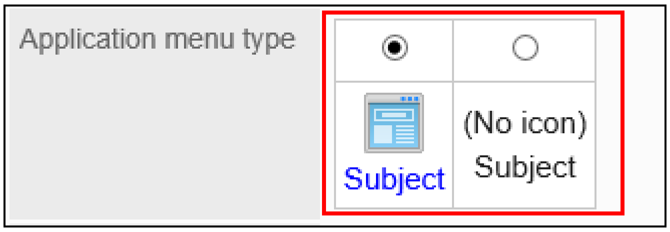
5. **Click "Header and footer settings".**

6. **By toggling the "Application menu" checkbox in "Header and footer settings" screen, you can control whether to show or hide the application menu.**

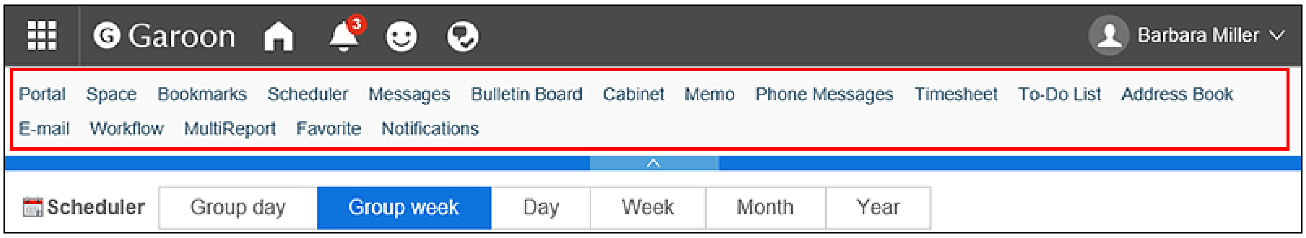
If you uncheck the "Show" checkbox, you can hide the application menu.



7. **Choose "Application menu type" option whether to display application icons or not.**



When you configure not to show icons of applications, only the application names are displayed in the Application menu.



8. **Confirm your settings and click "Save".**

Allowing Users to Change Application Menu

You can select whether to allow users to change the application menu.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

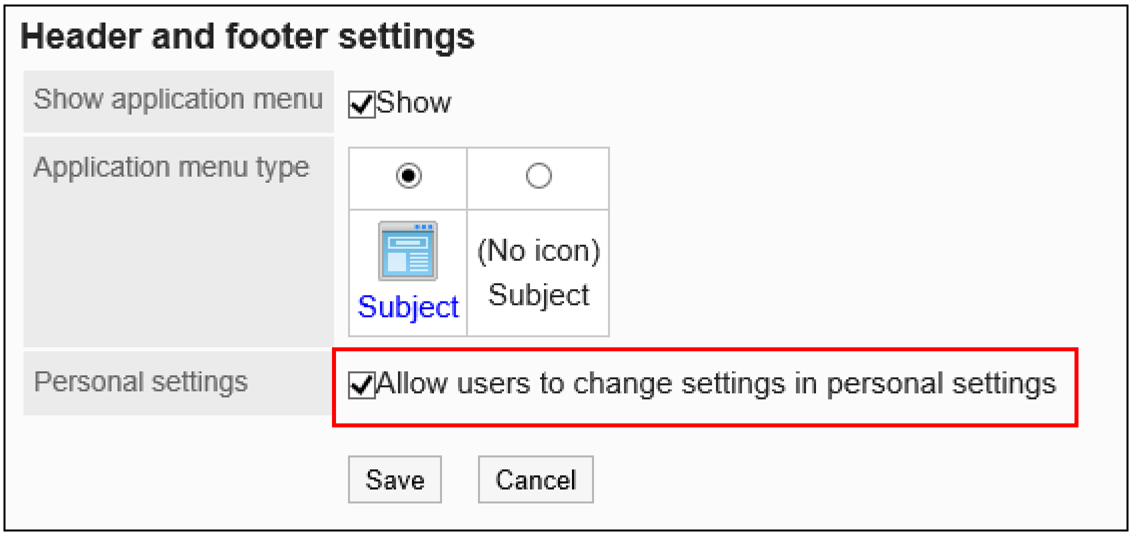
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click "Header and footer settings".**

6. **In the "Personal settings" field on the setting screen for headers and footers, select whether to allow users to change the application menu.**



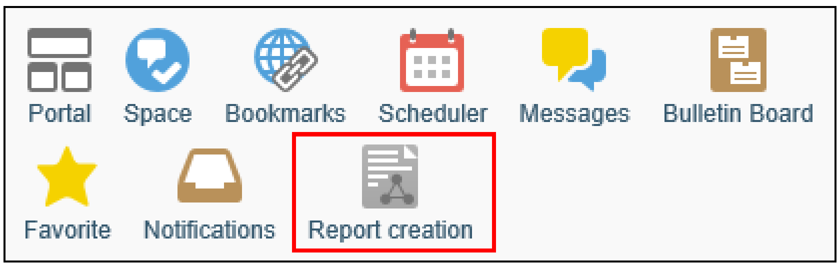
If you select the check box to allow users to change settings in personal settings, users can change the appearance of the application menu in the personal settings.

7. **Confirm your settings and click "Save".**

Adding Application Menus

You can add menus to the Application menu.

You can add Garoon applications and the links to Web sites.



Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

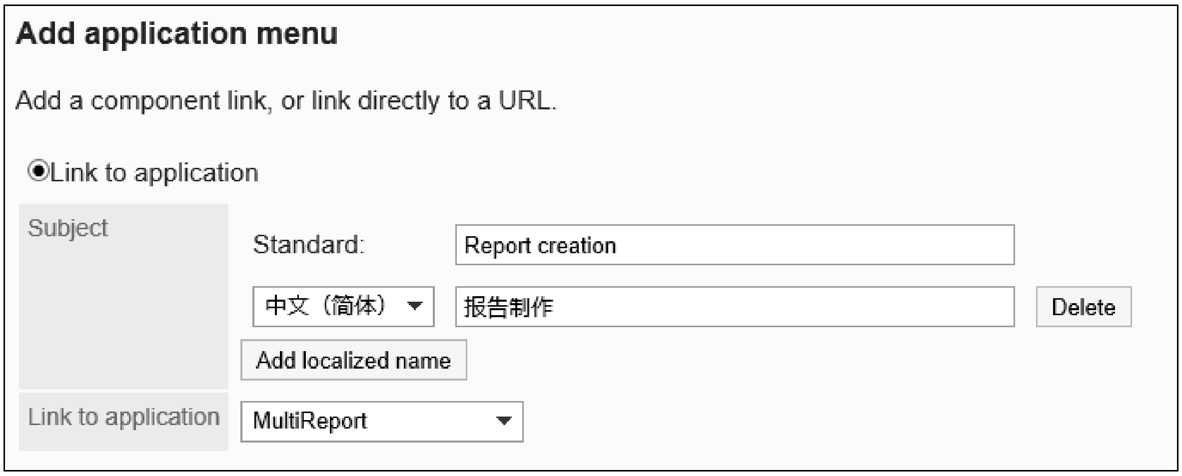
3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click the item for list of Application menu.**

6. **In the list of Application menu, click the item to add menus.**

7. **On the screen for adding application menu, select a link method and set the required items.**
   - For links to applications:
     Set up links to Garoon applications.
     - Subject:
       Enter a title.
       Clicking "Add localized name" allows you to set subjects in multiple languages.
       If you do not set the subject in the user preference language, the default subject is displayed.
       The following languages can be set:
       - 日本語
       - English
       - Simplified Chinese
       - Traditional Chinese
         This is displayed in Traditional Chinese.
     - Links to applications:
       Select the applications you want to link.
       The Application menu displays the icon of the selected application. You cannot change the icon.



- For links to any URL:

  Set up links to systems other than Garoon or Web sites.

  - Subject:

    Enter a title.

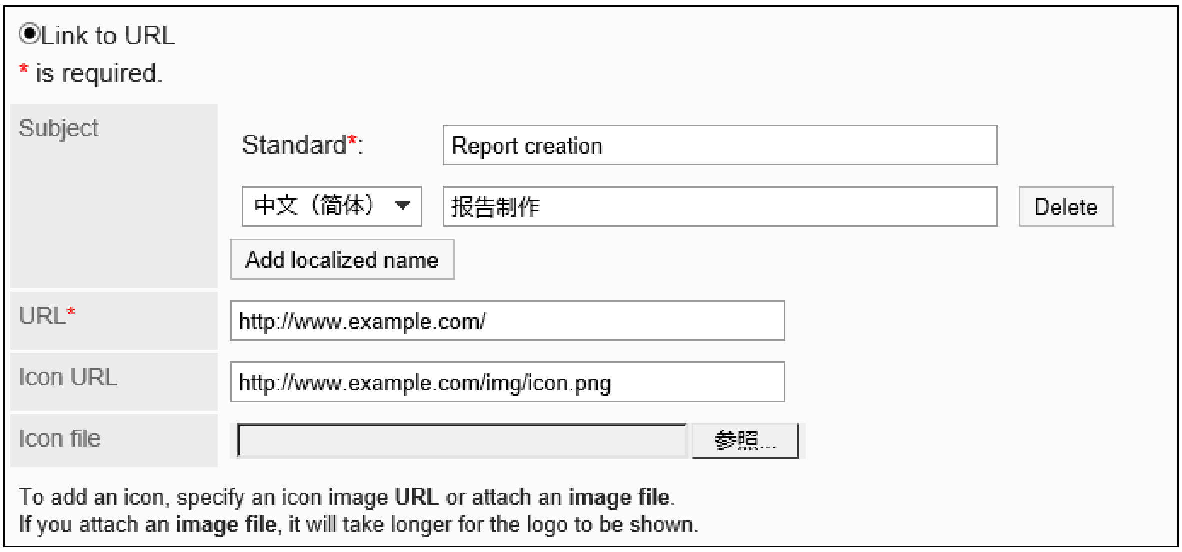
    Clicking "Add localized name" allows you to set subjects in multiple languages.
  - URL:

    Enter the URL of the destination, such as a system other than Garoon or a Web site.
  - Icon URL:

    Specify the URL of any image file on the Internet that you want to use for the icon.
  - Icon file:

    Specify a file for the icon.

    Specifing any files may affect the operation of Garoon.



Note

- If both the icon URL and icon file are set, images that are set for the icon URL will have precedence.
- If you add a link to any URL without specifying an icon, the default icon  is displayed on the user screen.

8. Confirm your settings and click "Add".

Changing Application Menus

You can change the Application menu.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

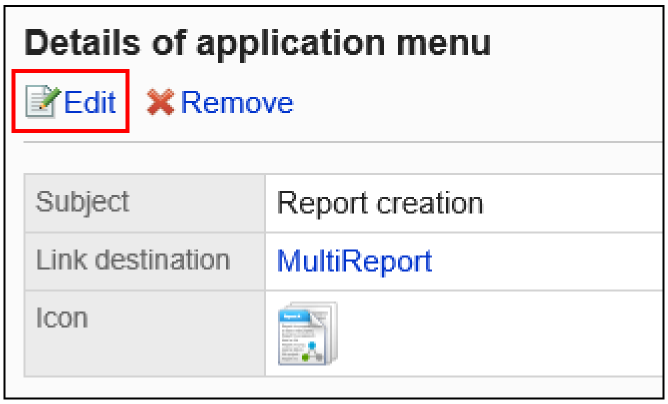
3. Select "Basic system administration" tab.

4. Click "Screen".

5. Click the item for list of Application menu.

6. In the list of Application menu, click the item to change.

7. On the detail screen of the Application menu, click "Edit".



8. **On the edit screen for Application menu, you can optionally change the title, URL, and so on.**

9. **Confirm your settings and click "Save".**

Note

- If you leave the title of an application link empty, the display name of the application is used.

Reordering Application Menus

You can reorder the menus in the Application menu.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

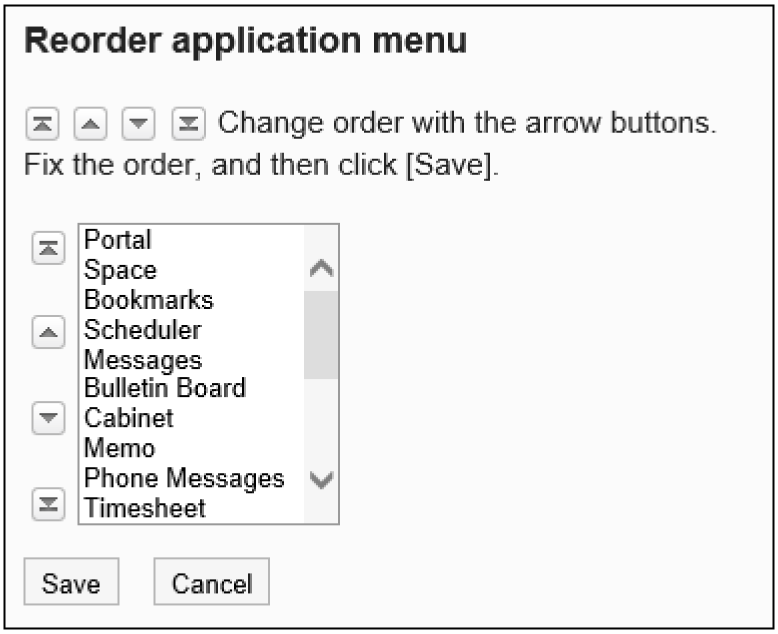
3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click the item for list of Application menu.**

6. **On the Application Menu list screen, click the item to reorder menus.**

7. **On the Reorder Application Menus screen, reorder the menus.**



8. Confirm your settings and click "Save".

Deleting Application Menus

You can delete application menus.

Deleting application menus does not delete data in the menus.

Caution

- The settings of the deleted application menus cannot be restored.

Deleting Application Menus One by One

You can delete the Application menus one by one.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

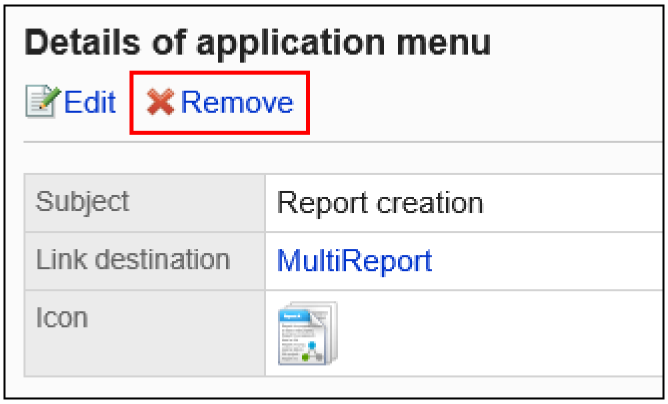
3. Select "Basic system administration" tab.

4. **Click "Screen".**

5. **Click the item for list of Application menu.**

6. **On the Application Menu List screen, select the application menu you want to delete.**

7. **On the Application Menu Details screen, click "Delete".**



8. **Click "Yes" on the Application Menu Delete screen.**

Deleting Multiple Application Menus in Bulk

You can delete multiple application menus together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

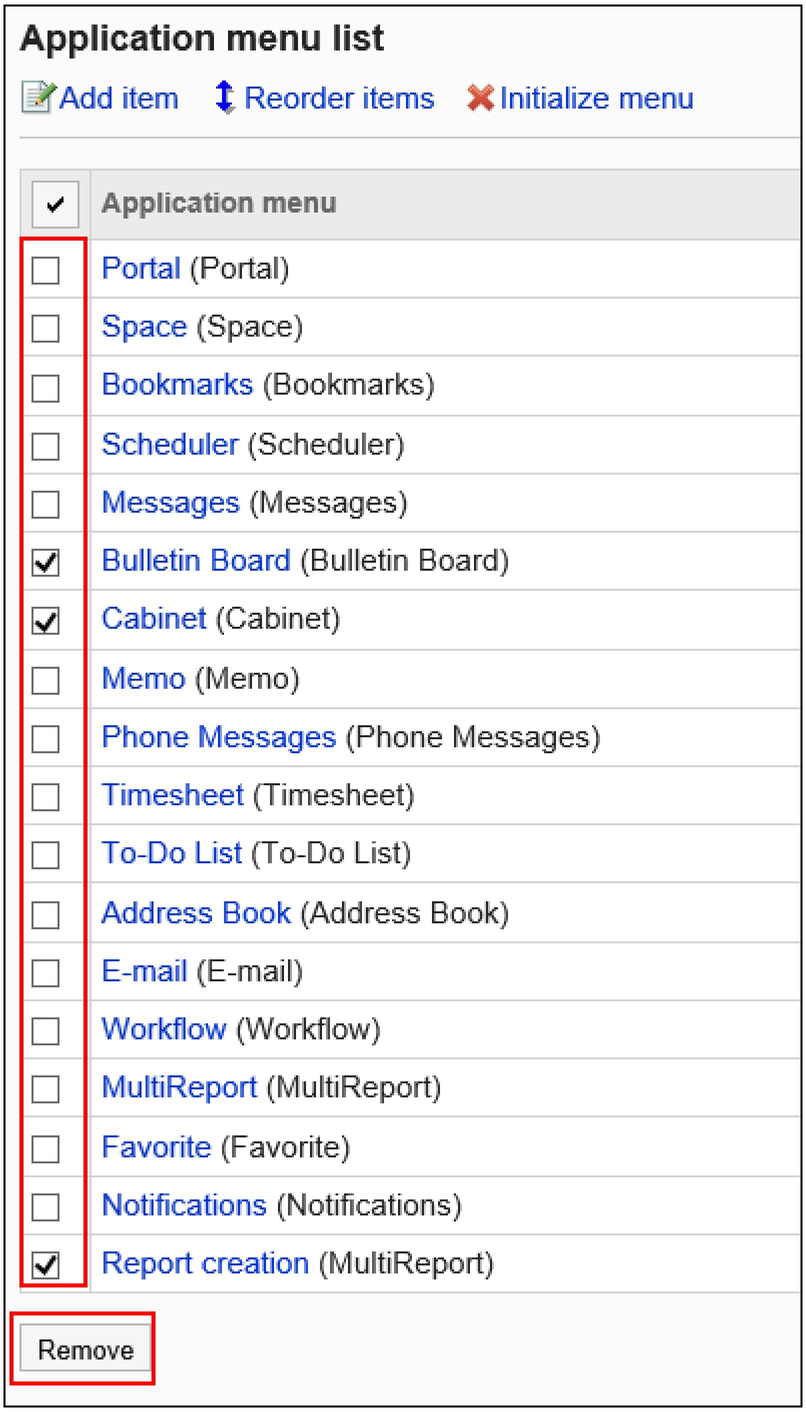
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click the item for list of Application menu.**

6. **On the Application Menu List screen, select the check box of the application menu you want to delete, and then click "Delete".**



7. Click "Yes" on the screen for deleting multiple application menus together.

Initializing Application Menu

When you initialize the application menu, the type of the menu, the name, the order of the display, and so on are restored.

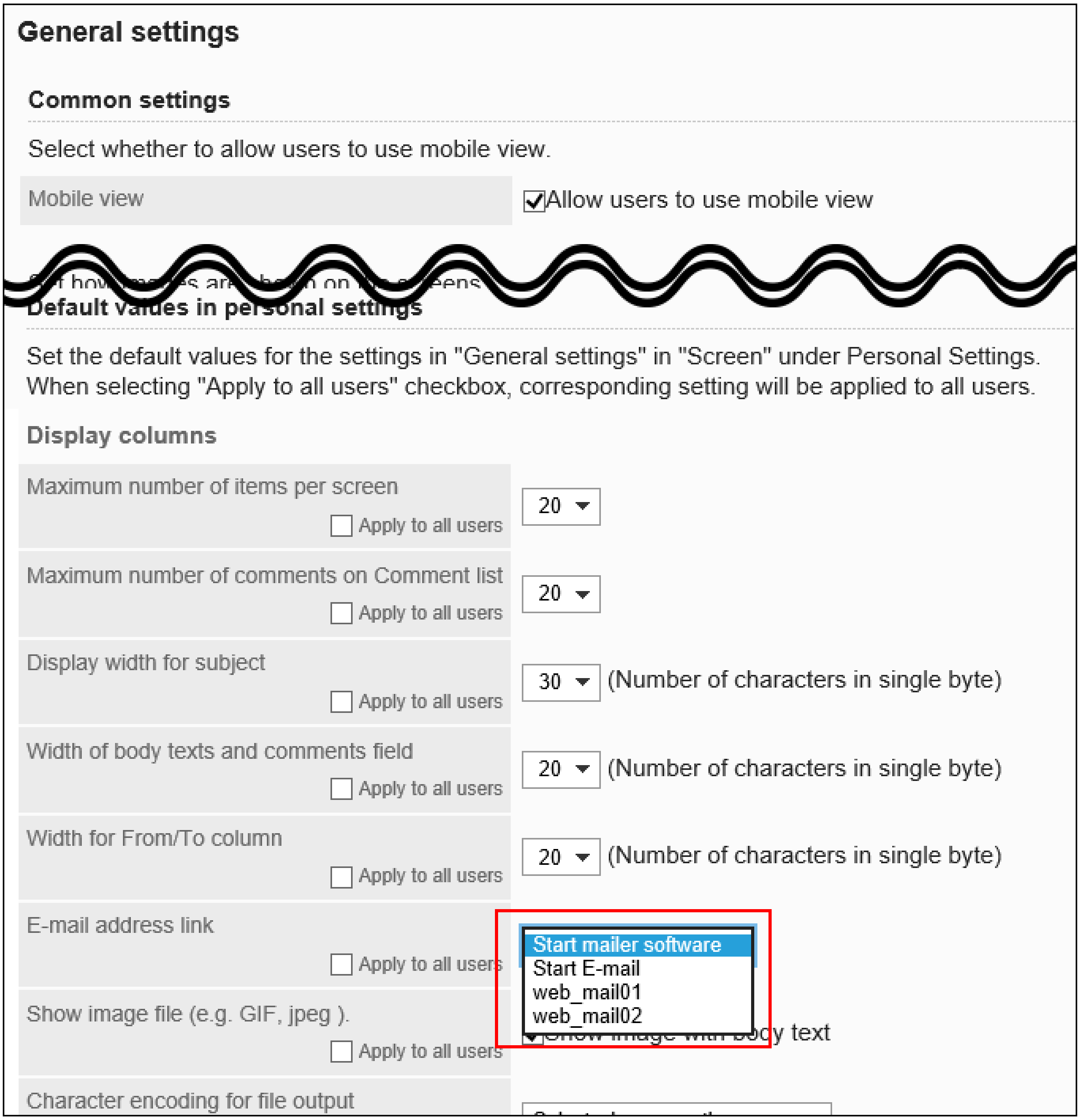
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Screen".**
5. **Click the item for list of Application menu.**
6. **On the Application Menu List screen, click item for initializing menu.**

7. **Click "Yes" on the Initialize Application Menu screen.**

1.8.4. Configuring Web Mails

You can configure which Web mail to use when links to e-mail addresses are clicked that are included in the body text and comments.
The Web mail that has been set is displayed in the drop-down list to show linked applications for e-mail addresses on the "General settings" screen.
For details, refer to Default values in personal settings(252Page).



Adding Web Mails

You can add any Web mails linked from the e-mail addresses on the screen.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

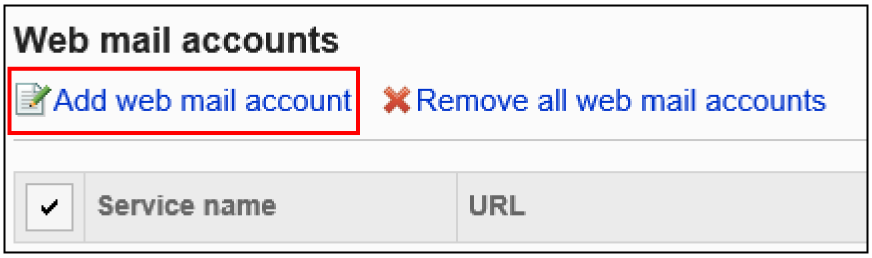
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

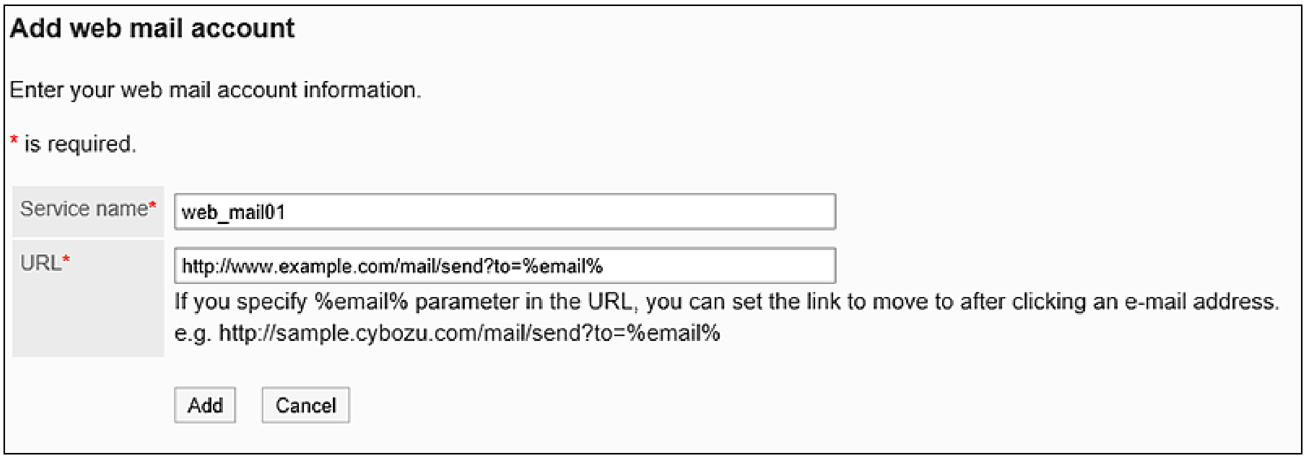
5. **Click the item for Web mail.**

6. **On the Web mail screen, click the item to add Web mails.**



7. **In the Web mail name field on the Add Web mail screen, enter the WEB mail name and URL.**

- Web mail name:
  You must set the Web mail name.
- URL:
  The URL is mandatory.
  To set the source e-mail address, you must specify a parameter (% e-mail%) in the URL.
  For the actual URL to configure, please contact the provider of each Web mail service.



8. **Confirm your settings and click "Add".**

Note

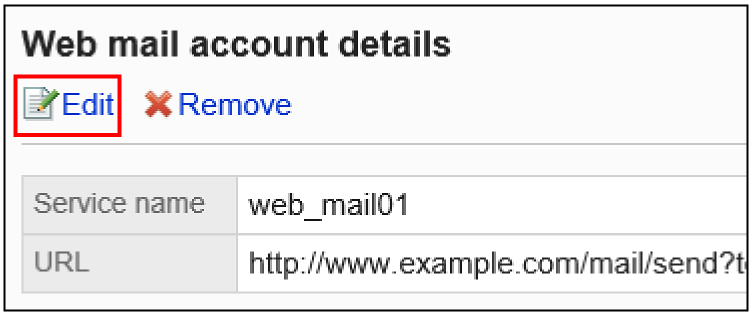
- If you have set any invalid URL, the e-mail program you have set for the Web browser starts, regardless of the configuration of the e-mail application.

Changing Web Mails

You can change the display name and URL of the Web mail.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Screen".**
5. **Click the item for Web mail.**
6. **On the Web Mail screen, select the Web mail name to change.**
7. **On the Web Mail Details screen, click "Edit".**



8. **On the Edit Web Mail screen, change the Web mail name and URL if necessary.**
9. **Confirm your settings and click "Save".**

Deleting Web Mails

You can delete the Web mails.

Caution

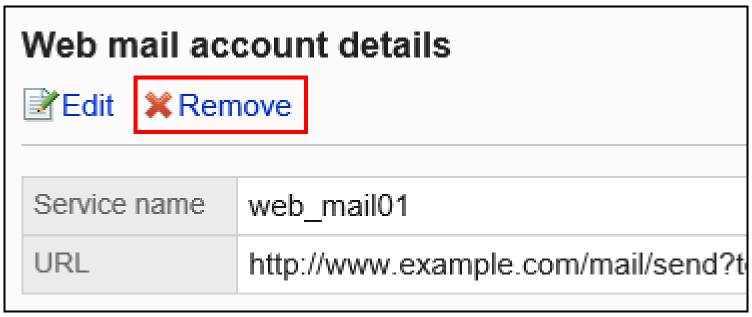
- Deleted Web mails cannot be restored.

Deleting Web Mails One by One

You can delete Web mails one by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Screen".**
5. **Click the item for Web mail.**
6. **On the Web Mail screen, select the Web mail name to delete.**
7. **On the Web Mail Details screen, click "Delete".**



8. **Click "Yes" on the Delete Web Mail screen.**

Deleting Multiple Web Mails in Bulk

You can select multiple Web mails and delete them together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

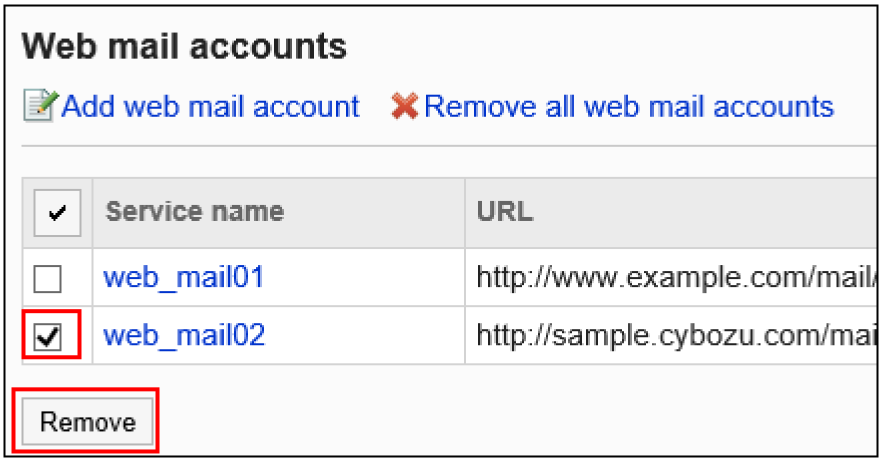
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click the item for Web mail.**

6. **On the Web mail screen, select the check box for the Web mail to delete, and then click "Delete".**



7. **Click "Yes" on the Delete All Web mails screen.**

Deleting All Web Mails

You can delete all the Web mails.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

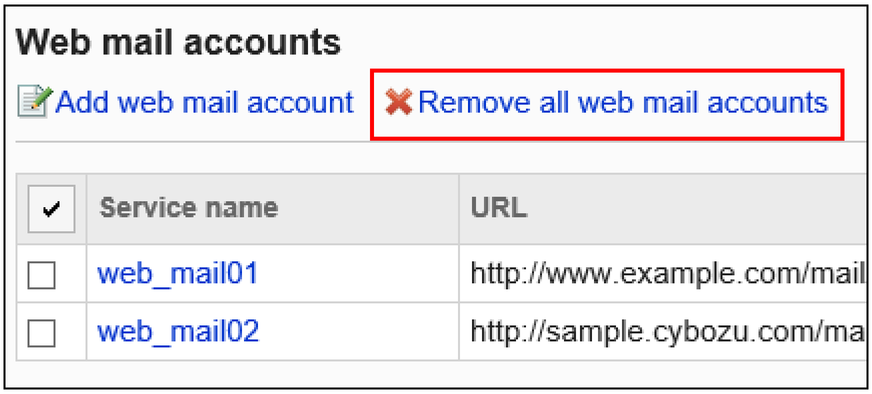
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click the item for Web mail.**

6. On the Web mail screen, click the item to delete all Web mails.

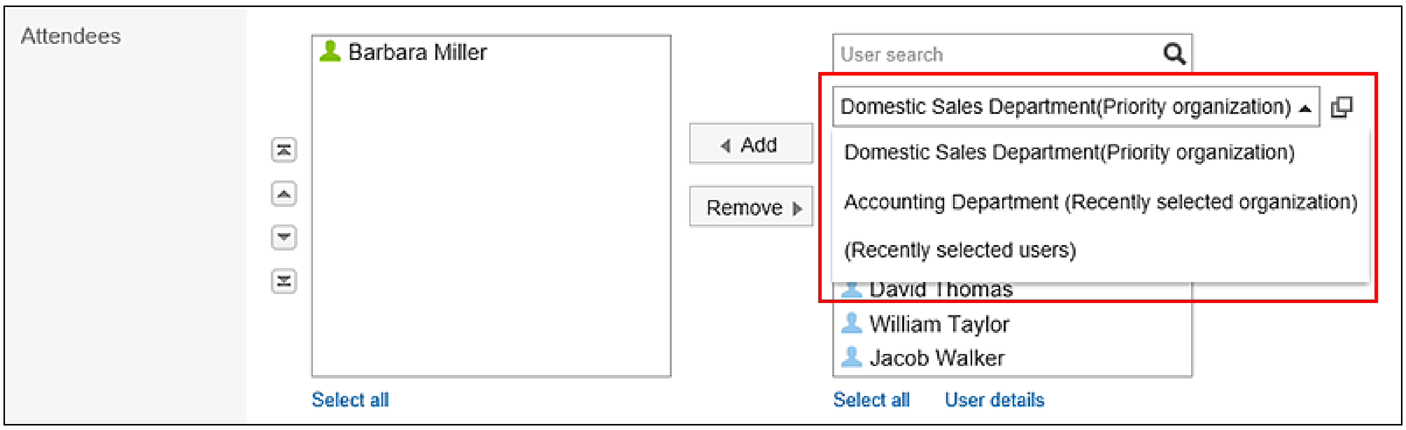


7. Click "Yes" on the Delete All Web Mail screen.

1.8.5. Drop-Down List Settings

You can set the contents to be displayed as recently selected items in the drop-down list on the User Actions screen. The following drop-down lists can be configured.

- Selecting organizations
- Selecting users
- Selecting facility groups
- Selecting facilities



Steps:

1. Click the Administration menu icon (gear icon) in the header.

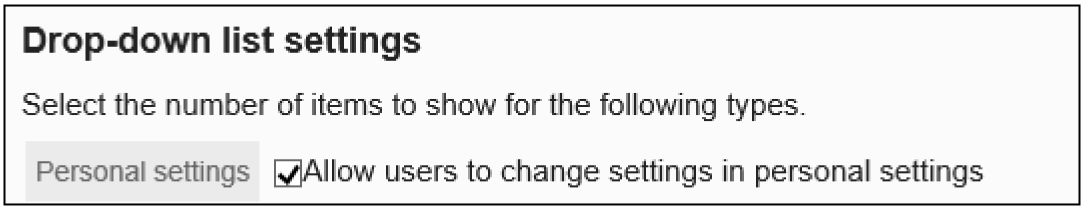
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Screen".**

5. **Click Drop-down List Settings.**

6. **In the "Personal settings" field on the drop-down list settings screen, you can set whether to allow each users to configure the drop-down list in their personal settings.**



7. **In the Number of Items field, set the number of items to display in the drop-down list for recently selected items.**

8. **To delete the history of a recently selected item, select the check box for the item you want to delete in the "Delete history" field.**

The selection history of selected items in the drop-down list is also deleted.

Deleted history cannot be restored.

9. Confirm your settings and click "Save".

1.9. Calendar

This section describes how to set up calendar events, such as holidays and workdays, that apply to all users of Garoon.
You can create your own calendars for each organization or office.

References

- Importing Japanese Holidays(280Page)
- General Settings for Localization(561Page)

1.9.1. Calendar Settings

You can set up calendars based on workdays for each organization and office.
Created calendars are used in portals and schedulers.

Calendar Types

The calendar types are as follows.

- Default Calendar:
  Calendar that is pre-registered in Garoon. By default, Japanese holidays are added as events.
  System administrators can add holidays, workdays, and memos as events.
- System Calendar:
  Calendars created by your system administrator. They can be created for certain purposes, such as creating

them for organizations or offices.

You can add holidays, workdays, and memos as events.

- My Calendar:

  Calendars created by users. Only users who have created them can use them.

  Anniversaries and memos can be added as events.

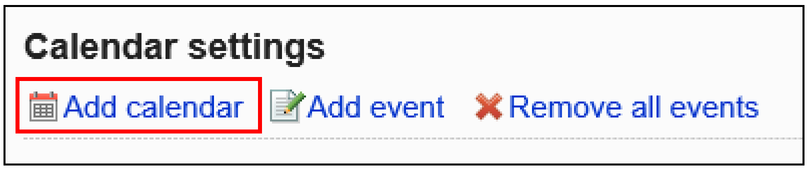
  For details, refer to the "My Calendar Settings" section.

Adding Calendars

You can add a system calendar.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Calendar Settings".**
6. **On the "Calendar Settings" screen, click "Add a Calendar".**



7. **On the screen to add calendars, enter a calendar name and a calendar code.**

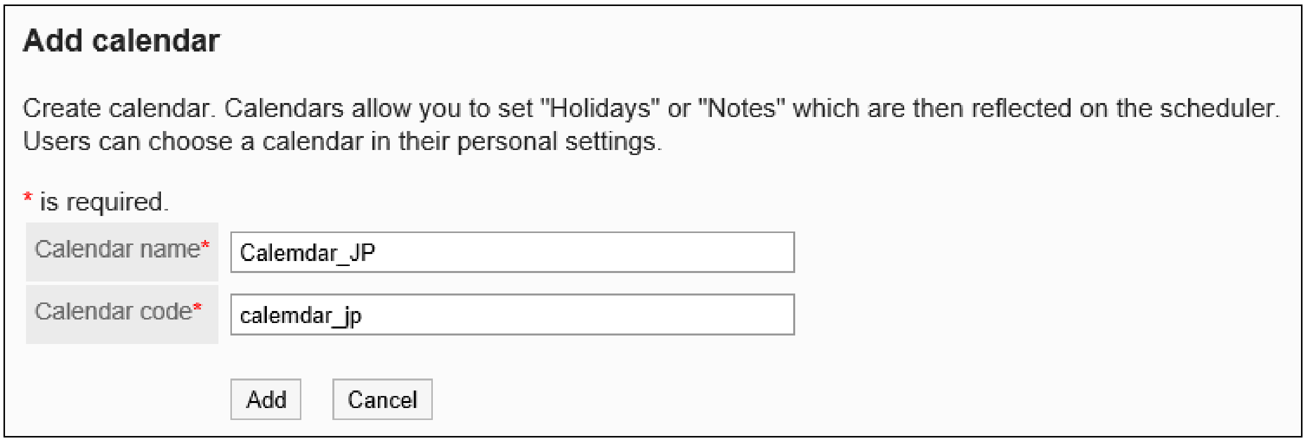
   You must set a calendar name and a calendar code.

   - Calendar name:

     Enter a display name for the calendar.

   - Calendar code:

     This is a unique code for identifying a calendar.



8. Confirm your settings and click "Add".

Importing Japanese Holidays

You can import Japanese holidays to a calendar.

Holiday data, of which date, event type, and event details are the same as those of any already registered holiday data, will not be imported.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

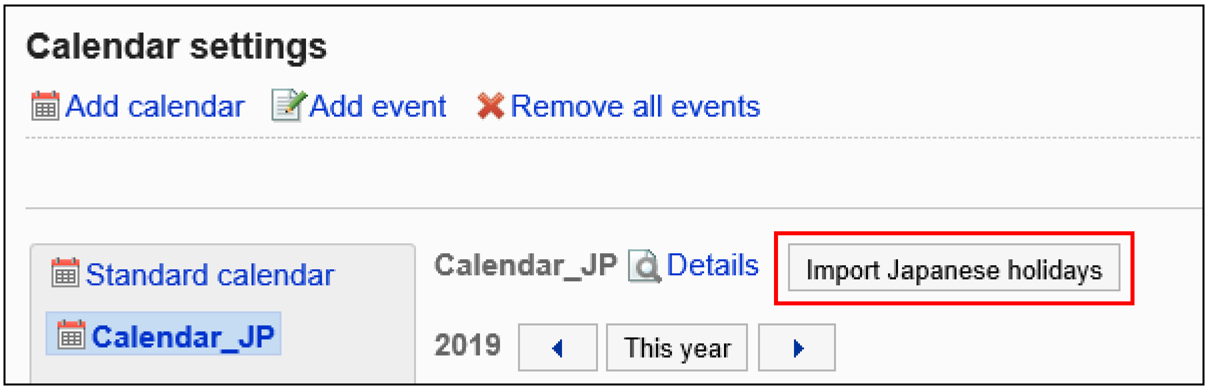
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Calendar".

5. Click "Calendar Settings".

6. On the "Calendar Settings" screen, select a calendar and click "Import Japanese Holidays".



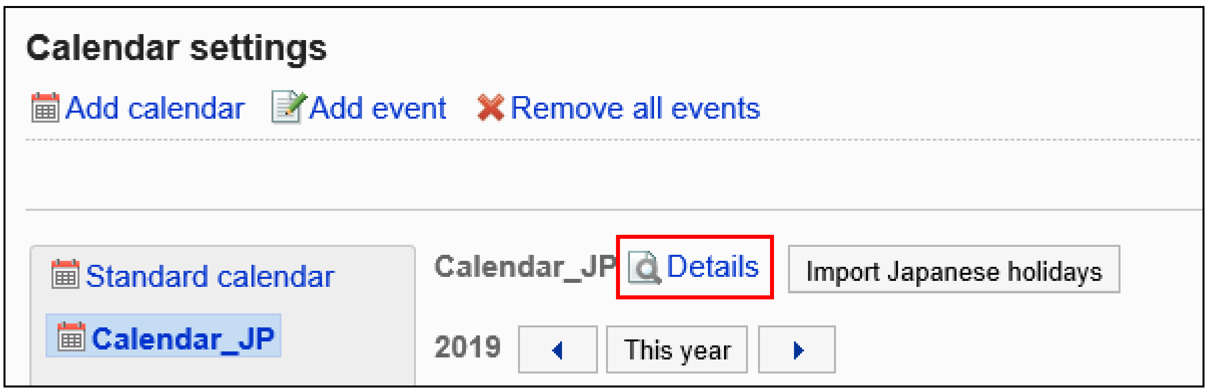
Changing Calendar Information

You can change calendar information.

You cannot change the calendar information for the default calendar.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Calendar Settings".**
6. **On the "Calendar Settings" screen, select a calendar and click "Details".**



7. **On the calendar details screen, click "Edit".**

8. **On the screen to change calendar Information, set the required items.**

9. **Confirm your settings and click "Save".**

Deleting Calendars

You can delete the system calendar.

If you delete a calendar, events included in that calendar are also deleted.

If a user deletes a calendar, the default calendar is applied to that user.

You cannot delete the default calendar.

Caution

- Deleted calendars cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

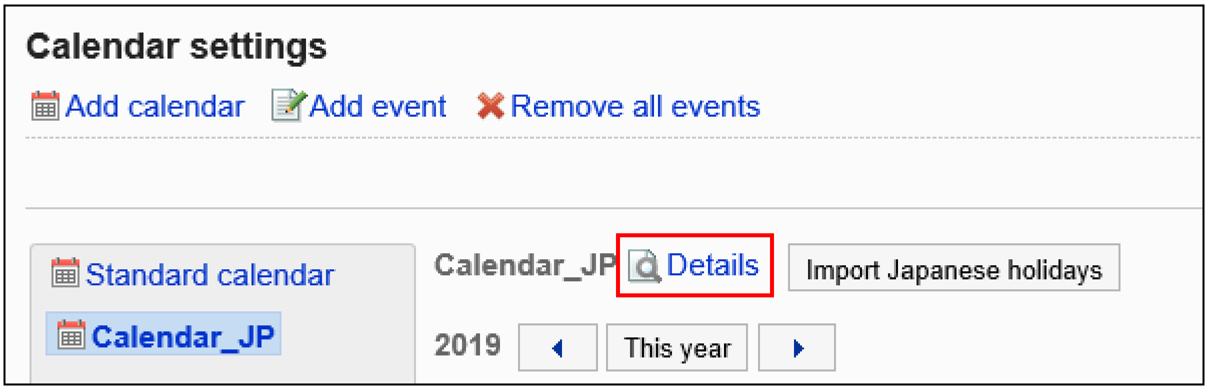
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Calendar".**

5. **Click "Calendar Settings".**

6. **On the "Calendar Settings" screen, select a calendar and click "Details".**



7. **On the calendar details screen, click "Delete".**

8. **On the screen to delete calendars, click "Yes".**

1.9.2. Setting Up Events

You can set up holidays, work days, and memos in a calendar.

Note

- System administrators can set whether or not to display holidays to users in the general settings for Scheduler(836Page).

Adding Events

You can add events.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

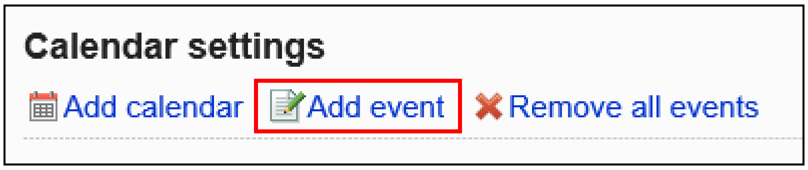
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Calendar".**

5. **Click "Calendar Settings".**

6. **On the "Calendar Settings" screen, select a calendar and click "Add an Event".**



7. **On the "Add an Event" screen, set the date of the event in the "Date" field.**

8. **In the "Event Type" field, select an event type.**

Calendar display varies depending on the type of event. The following types of events can be selected.

- Holiday:

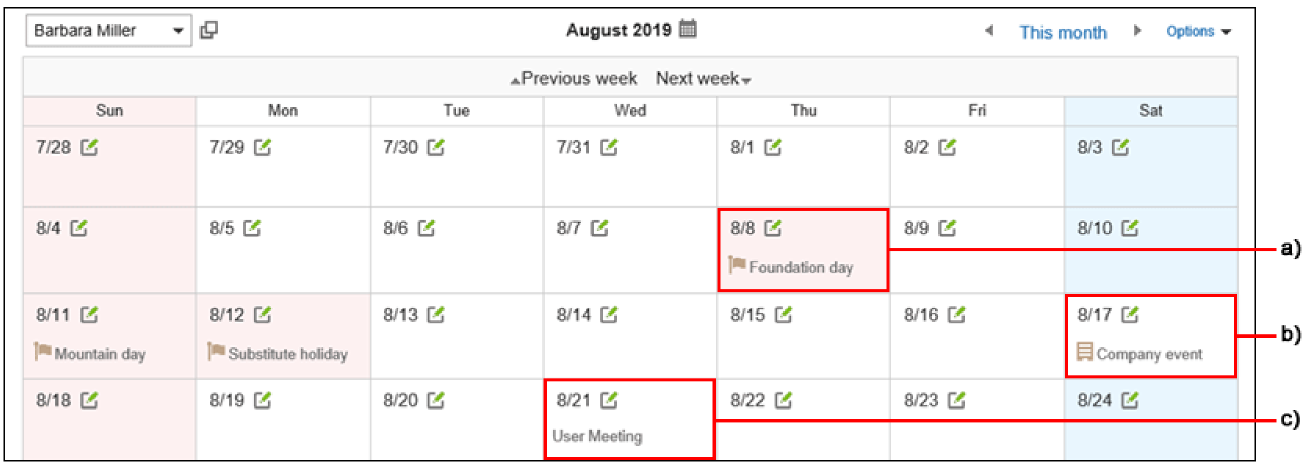
  Select this to add holidays. Holiday icon and event details will be displayed on the specified date. The background color is red.

- Work day:

  Select to add business days. Workday icon and event details will be displayed on the specified date. The background color is white.

- Memo:

  Event details are displayed on the specified date. The background color does not change.



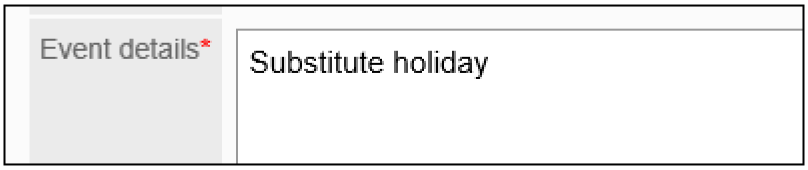
a): Holiday

b): Workday

c): Memo

9. Enter an event name in the "Event details" field.

This event details must be set.



10. Confirm your settings and click "Add".

Changing Events

Change the settings of an event.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Calendar".

5. Click "Calendar Settings".

6. On the "Calendar Settings" screen, select a calendar, and then click the date of the event you want to change.

7. On the "Event details" screen, click "Edit".

8. On the screen to edit events, set the required items.

9. Confirm your settings and click "Save".

Deleting Events

You can delete events.

Caution

- Deleted events cannot be restored.

Deleting Events One by One

You can delete events one by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Calendar Settings".**
6. **On the "Calendar Settings" screen, select a calendar and click the date of the event you want to delete.**
7. **On the "Event details" screen, click "Delete".**

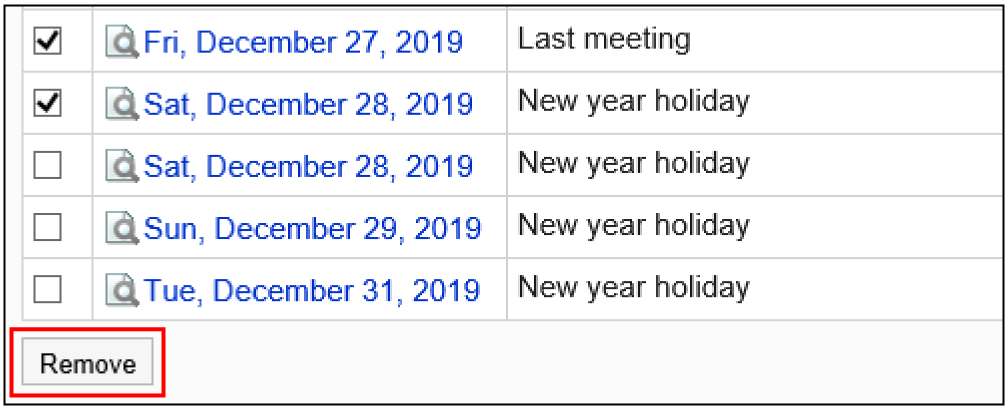
8. **Click "Yes" on the screen to delete events.**

Deleting Multiple Events in Bulk

You can select multiple events and delete them all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Calendar Settings".**
6. **On the "Calendar Settings" screen, select a calendar.**
7. **Select the check boxes of the events you want to delete, and then click "Delete".**



8. **Click "Yes" on the screen to delete events in bulk.**

Deleting All Events in a Calendar

You can delete all events in a calendar.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Calendar".**

5. **Click "Calendar Settings".**

6. **On the "Calendar Settings" screen, select a calendar and click "Delete all events in Calendar".**

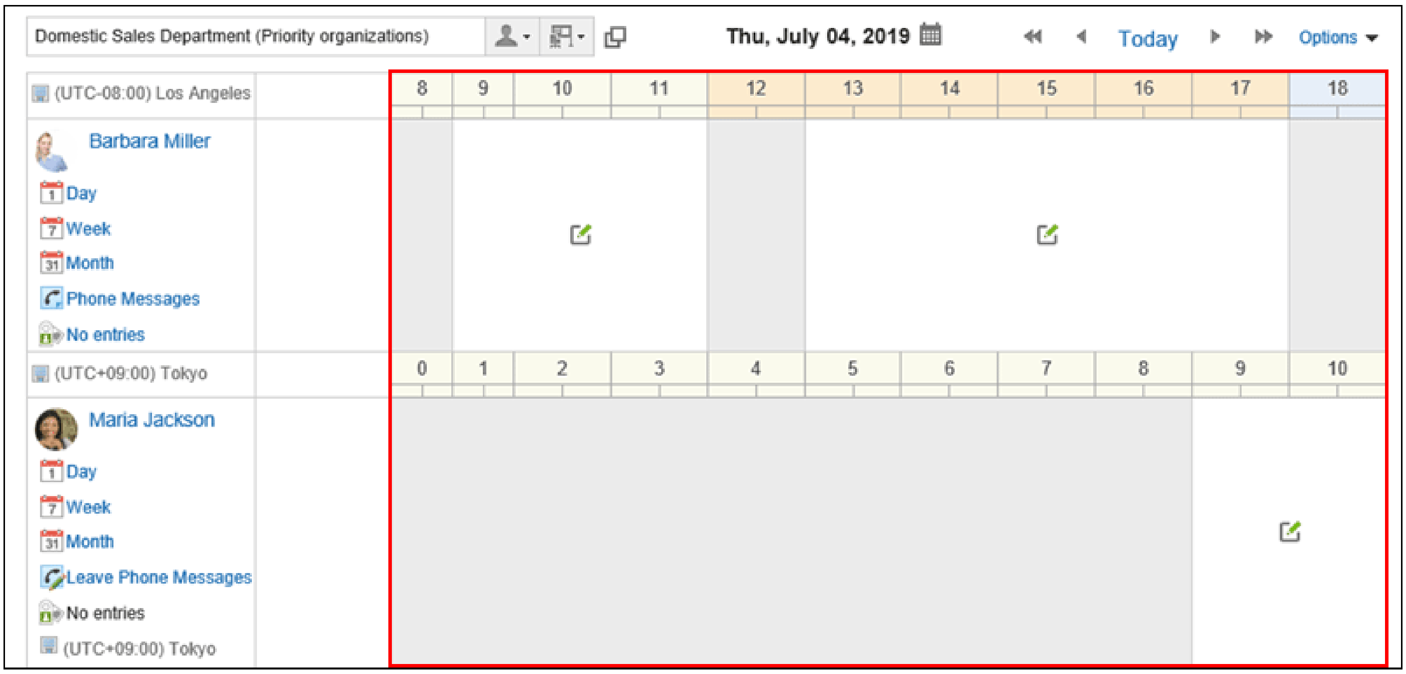
7. **On the screen to delete all events, click "Yes".**

1.9.3. Office Settings

You can set up offices.

This is useful if you have a number of offices, such as overseas branches and factories, and each office has different workdays and working hours.

You can check users' schedulers during the workdays and the working hours of each office.



Note

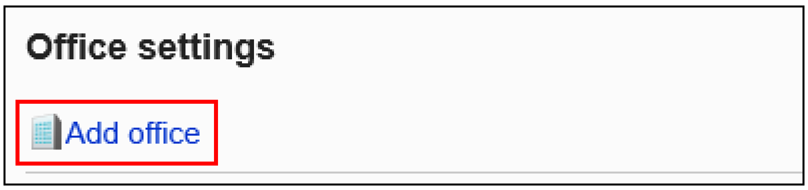
- Users can customize the office settings set by the system administrator, in the office settings section of the personal settings.

Adding Offices

You can add offices.

Steps:

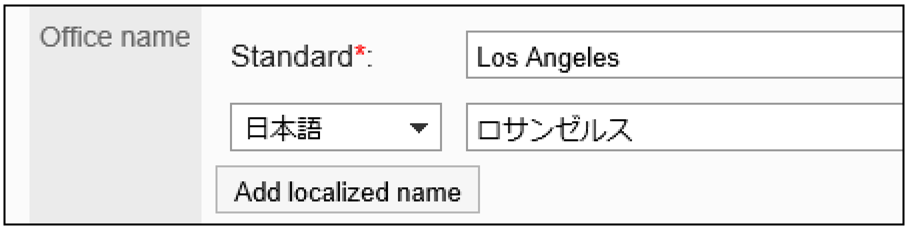
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Office Settings".**
6. **On the screen to set offices, Click "Add Office".**



7. **On the screen to add offices, enter the office name.**

You must set a standard office name.
Clicking "Add localized name" allows you to set office names in multiple languages.
If you do not set the office name in the user preference language, the default office name is displayed.
The following languages can be set:

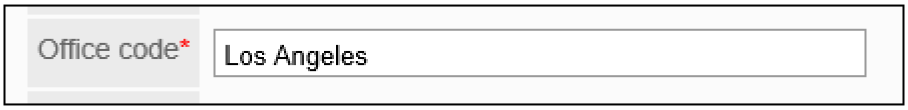
- 日本語
- English
- Simplified Chinese
- Traditional Chinese
  Displayed in Traditional Chinese.



8. **Enter the value in the office code field.**

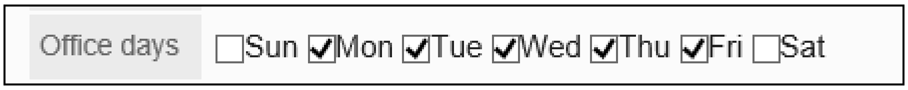
The office code must be set.

This is a unique code for identifying an office.



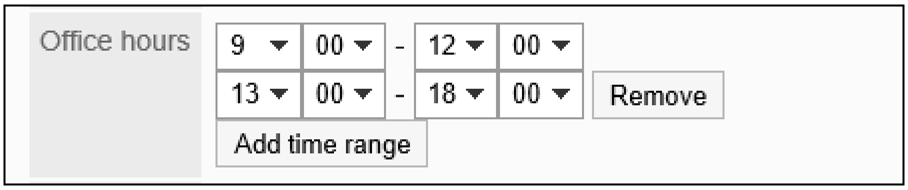
9. **In the "Work Days" field, set the workdays by specifying the days of the week.**

Select the check boxes for the days of the week that you want to specify as workdays.

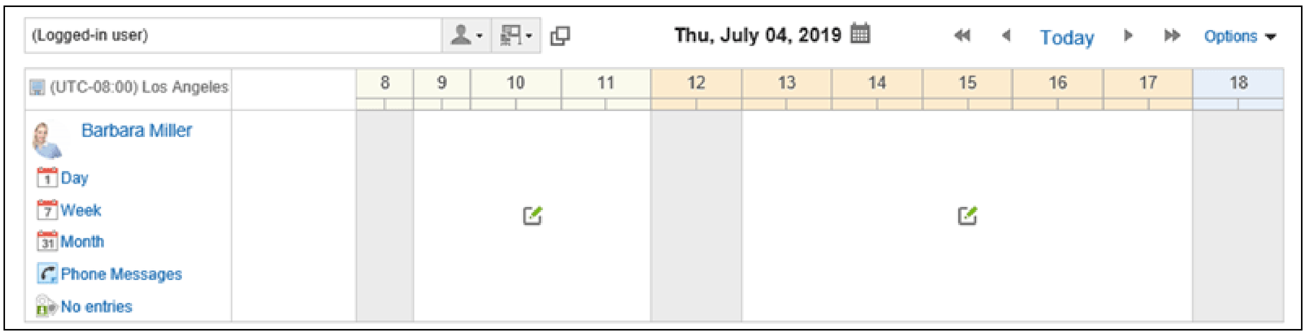


10. **In the "Working hours" field, set the time period to perform daily operations.**

By clicking to add time periods, you can set multiple working hours. For example, you can exclude lunchtime and set the working hours in the morning and the afternoon.



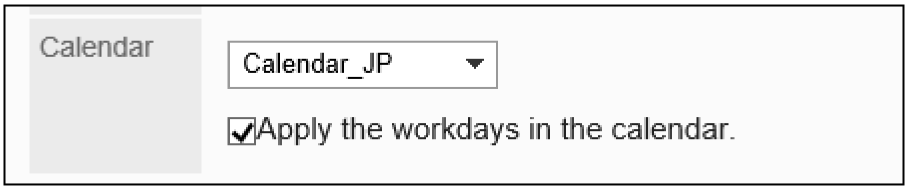
During the non-working hours, the icon to register appointments does not appear on the "Group Day View" screen of the scheduler.



11. **In the "Calendar" field, select a calendar to use for the office.**

To apply the calendar workdays to the office, select the "Apply Calendar workdays" check box. If you do not apply them, events on the workdays are displayed in the calendar, but the background color does not change.

For details on workdays, refer to the "Setting Up Events(283Page)" section.



12. Confirm your settings and click "Save".

Changing Offices

You can change the office settings.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

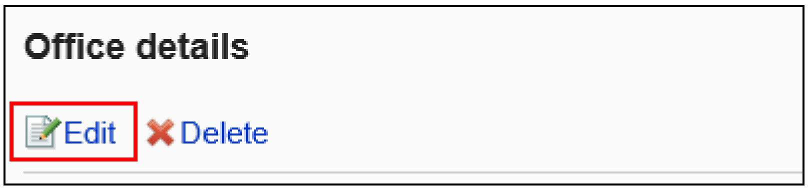
3. Select "Basic system administration" tab.

4. Click "Calendar".

5. Click "Office Settings".

6. On the screen to set offices, click the name of the office you want to change.

7. On the office details screen, click "Change".



8. On the screen to change offices, set the required items.

9. Confirm your settings and click "Save".

Deleting Offices

You can delete offices.

If a user deletes an office, the user's office settings are inherited as "user-specific settings".

Caution

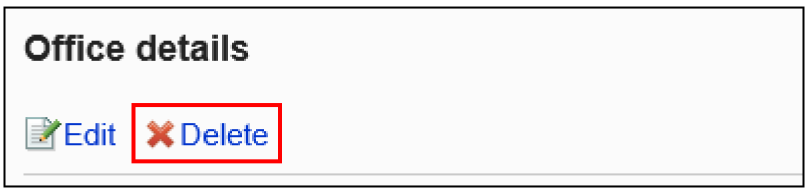
- Deleted offices cannot be restored.

Deleting Offices One by One

You can delete offices one by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Office Settings".**
6. **On the screen to set offices, click the name of the office you want to delete.**
7. **On the office details screen, click "Delete".**



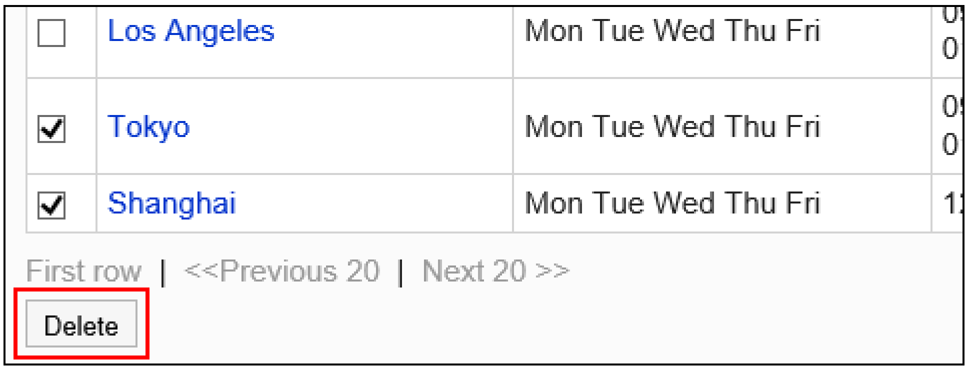
8. **Click "Yes" on the screen to delete offices.**

Deleting Multiple Offices in Bulk

Select the offices you want to delete, and delete them all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Calendar".**
5. **Click "Office Settings".**
6. **On the office settings screen, select the check boxes for the offices you want to delete, and then click "Delete".**



7. **On the screen to delete offices in bulk, click "Yes".**

1.9.4. Managing Data Using Files

You can manage calendar data using CSV files.

The following data can be managed using CSV files:

- Events
- Office Information

- Office Name

Managing Events Using CSV Files

You can manage events using CSV files.

Importing Data from a CSV File

You can import events from a CSV file.
Data imported from a CSV file is added as new events. Events that have been added to Garoon are not overwritten by the contents of the file.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in Calendars(1821Page).

2. **Click the Administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "Calendar".**

6. **Click "Calendar Settings".**

7. **On the "Calendar Settings" screen, select a calendar and click "Import an Event".**

8. **On the screen to import events step 1/2, select the CSV file that you created in step 1.**

9. Set the required items for the data to import, and then click "Next".

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".

10. On the screen to import events step 2/2, check the contents of the CSV file, and click "Import".

Exporting Data to a CSV File

You can export events to a CSV file.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

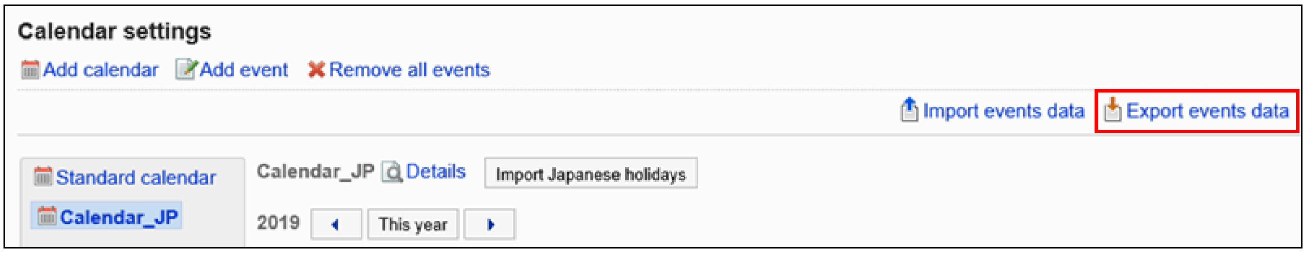
2. Click "System settings".

3. **Select "Basic system administration" tab.**

4. **Click "Calendar".**

5. **Click "Calendar Settings".**

6. **On the "Calendar Settings" screen, select a calendar and click "Export an Event".**



7. **On the screen to export events, set the required items for the exported data.**

The setting fields are as follows:

- Period to export:

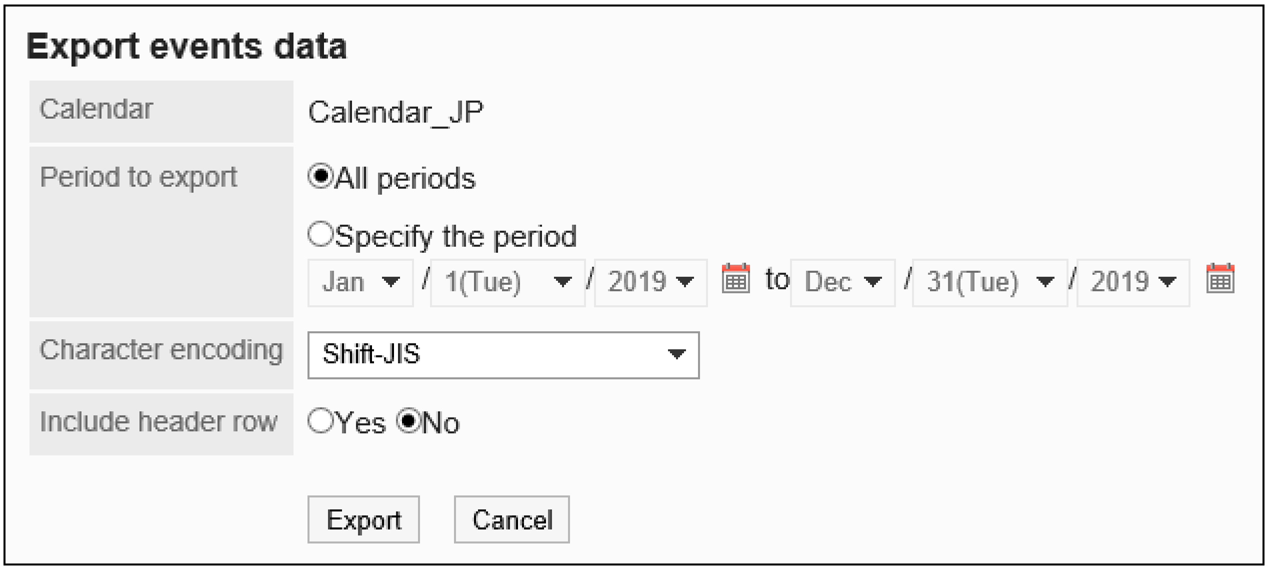
  Specify all periods or a period to export.
- Character encoding:

  Encodes data from a CSV file with the selected character code.

  The following character encoding can be selected:
  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".



8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

Managing Office Data in CSV Files

You can manage office information and office names using CSV files.

Importing Data from a CSV File

You can import office information and office names from a CSV file.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in Calendars(1821Page).

2. **Click the Administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "Calendar".**

6. **Click "Import from CSV file".**

7. **On the "Import from CSV File" screen, select data to import from a CSV file.**

8. **Select the CSV file that you created in step 1.**

9. **Set the required items for the data to import, and then click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".

10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

You can export office information and office names to a CSV file.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Calendar".**

5. **Click "Export to CSV file".**

6. **On the "Export to CSV File" screen, select data to export to a CSV file.**

7. **Set the required items for the the data to export.**

   The setting fields are as follows:

   - Character encoding:
     Select the character code that you want to use for encoding.
     The following character encoding can be selected:
     - Unicode (UTF-8)
       You can select with BOM as required.
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)
   - Include header row:
     To export an item name to the header row of a CSV file, select "Yes".
   - Language in which the data is exported:
     This item is displayed when you export the display name of the office.
     The office name will be exported to a CSV file in the language that you select.
     You can select multiple languages. The following languages can be selected:
     - All
     - 日本語
     - English
     - Simplified Chinese
     - Traditional Chinese
       Exported in Traditional Chinese.

8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

1.10. Logging

This section explains Garoon logs.

References

- Log Settings(301Page)
- Archiving settings(306Page)
- Checking logs(313Page)
- List of Log Output Specifications(316Page)

1.10.1. Managing Logs

This section describes managing logs.

References

- Log Settings(301Page)
- Changing the Log Retention Period(305Page)
- Archiving Settings(306Page)
- Log Archive Specifications(308Page)
- Checking Logs(313Page)
- List of Log Output Specifications(316Page)

1.10.1.1. Log Settings

Sets the output conditions for logs.

Types of Log Severity

Log types are set in the Garoon process. You can specify whether to output logs for each type.

The following types of Garoon logs are:

Type	Description
Error	When the "error" screen of Garoon is displayed, it is output.
Warning	This is output when an error does not appear on the "error" screen of Garoon. Example: When the e-mail forwarding of an appointment is unsuccessful, the e-mail forwarding of phone notes is unsuccessful.
Important	This is mainly output when Garoon data is updated. Logins and logouts are also output as the important information logs.
General	This is mainly output when data is referred to. Example: View topics, download files

Caution

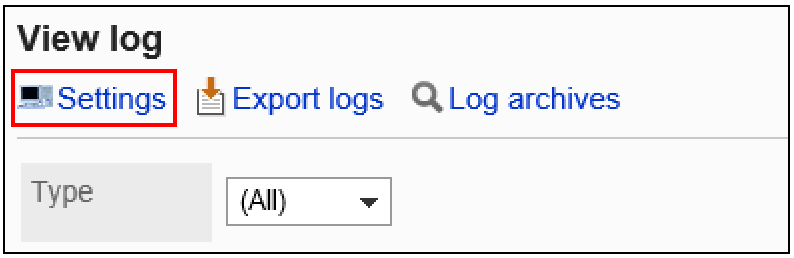
- To save logs in the DB-partitioned Garoon, specify "database logs" for the output destination.
  If an output destination other than "Database log" is specified, system logs are saved to multiple servers, causing inconsistency in the logs.

Note

- If the system log is not saved in the Windows environment, refer to the Event log is not output even if "System Log" in the "System administration" is selected as the log output destination (Windows only) in the FAQ.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Logging".**
5. **Click "Log List".**
6. **On the "Log List" screen, click "Set Log".**



7. **On the "Log Settings-Step 1/2" screen, select the category for which you want to output logs, and then click "Next".**

8. On the "Log Settings-Step 2/2" screen, set the required items for each severity level.

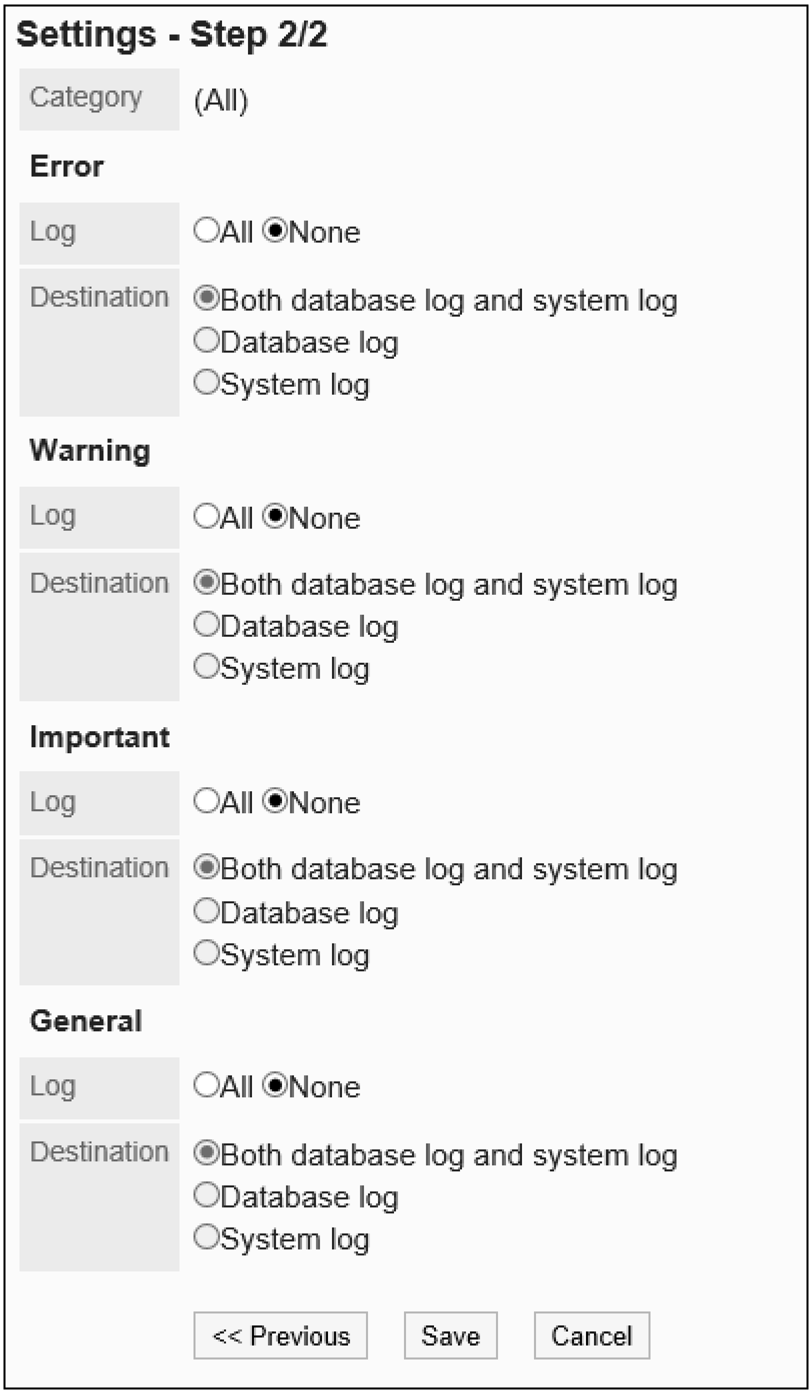
The setting fields are as follows:

- Log:
  Select whether to output the log.
- Destination:
  Select the log output destination. The available output destinations are as follows
  - Both (Database logs/system logs)
  - Database logs
    Logs are output to the Garoon database. When data is backed up, database logs are also backed up. To display logs on the "View log" screen, save database logs.
    - System logs
      The Garoon logs are output to the server operating system logs.
      - **For Windows:**
        Output as an event to "Windows Logs" in "Event Viewer".
        When you select "Event Viewer" > "Windows log" > "Applications" from the "Administrative Tools" on Windows, the logs are displayed.
        The severity of Garoon logs corresponds to the Windows event level.

Log severity of Garoon	Windows Event Type
Error	Error
Warning	Warning
Important	Information
General	Information

      - **For Linux:**
        By default, logs are output to the following directory
        /var/log/messages
        The type (facility) of the Garoon log is daemon.
        The severity of Garoon logs corresponds to the priority of the Linux logs.

Log severity of Garoon	Priority on Linux
Error	info
Warning	info
Important	info
General	info



9. Confirm your settings and click "Save".

1.10.1.2. Changing the Log Retention Period

The log retention period is set to "90 days" by default.
You can confirm log details in "View log" screen when they are within the log retention period. After the retention period has expired, logs can be confirmed only in the archives.
You can change the log retention period in the configuration file (common.ini) if necessary.

Steps:

1. Stop the Web server service on the server where Garoon is installed.

2. Open the common.ini file.

When Garoon is installed into the default installation directory, common.ini file is created in the following directory.

- On Windows:
  C:\Inetpub\scripts\cbgrn
- On Linux:
  /var/www/cgi-bin/cbgrn

3. Specify the log retention period in days in "retention_period" under [Logging] section.

The log retention period must be specified between 1 and 365 days.
Example to change the log retention period to 180 days:

- Before change

```
[Logging]
rotation = "100000"
retention_period = "90"
```

- After changing:

```
[Logging]
rotation = "100000"
retention_period = "180"
```

4. Save the common.ini file.

If Garoon is in operation on multiple servers, repeat the steps 2 to 4 on all of the servers.

5. Start the Web server service on the server where Garoon is installed.

1.10.1.3. Archiving Settings

On a regular basis (weekly), Garoon checks whether a log that is earlier than 90 days is stored in the database, and logs an old log.
For details on archiving, refer to Archive specifications(308Page).
This section describes how to change the archiving settings.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

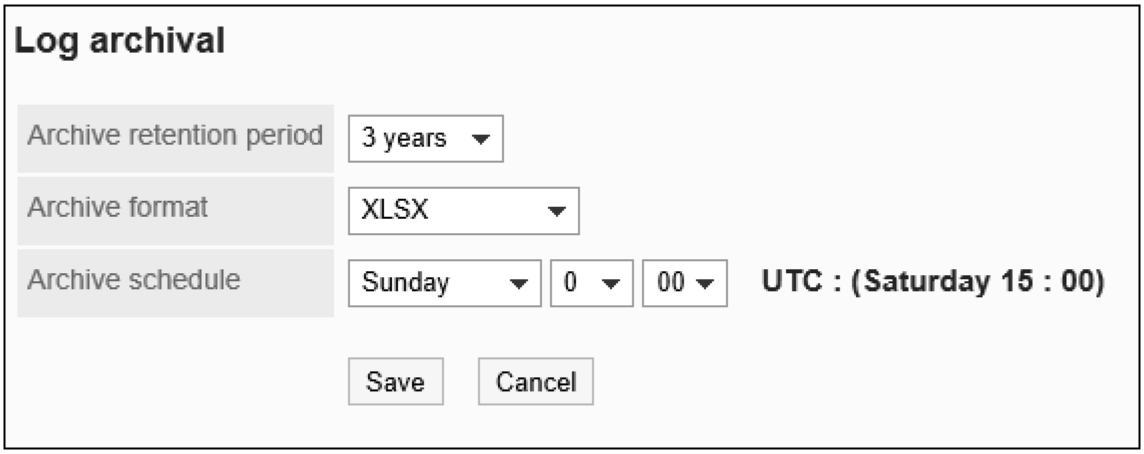
4. Click "Logging".

5. Click "Archive Settings".

6. On the "Archive Settings" screen, set the required items.

The setting fields are as follows:

- Archive retention period:
  Specify the retention period for archived files. The default value is "three years".
- Archive format:
  Select archive file format. The following file formats can be selected The default value is "XLSX" .
  - XLSX
  - CSV (UTF-8)
  - CSV (Shift-JIS)
- Archive schedule:
  Archival is performed weekly. Specify the day and the time at which archival is performed.



7. Confirm your settings and click "Save".

Changing the Maximum Amount of Logs to Be Saved in One Archive

By default, the maximum amount of logs stored in one file is 100,000 lines.

If you want to change the maximum amount of logs you want to save, change the value in common. ini.

Note

- The maximum amount of logs to be saved depends on the archive file format.
    - XLSX format: Up to 100,000 lines
    - CSV (UTF-8) or CSV (Shift-JIS) format: up to 500,000 lines
- common.ini If you specify a value that exceeds the upper bound of the common. ini file, the maximum amount is applied.

Steps:

1. Stop the Web server service on the server where Garoon is installed.

2. Open the common.ini file.

When Garoon is installed into the default installation directory, common.ini file is stored in the following directory.

- On Windows: C:\Inetpub\scripts\cbgrn
- For Linux: /var/www/cgi-bin\cbgrn

3. In "Rotation" in the "Logging" section, specify the maximum amount of logs that can be saved in one archive.

Example to change the maximum log to 500,000 lines:

- Before change

```
[Logging]
rotation = "100000"
retention_period = "90"
```

- After changing:

```
[Logging]
rotation = "500000"
retention_period = "90"
```

4. Save the common.ini file.

If Garoon is in operation on multiple servers, repeat the steps 2 to 4 on all of the servers.

5. Start the Web server service on the server where Garoon is installed.

1.10.1.4. Specifications for Archiving

Garoon regularly (weekly) checks whether logs from more than 90 days before are saved in the database and archives any existing old logs.

Specifications for Archiving

- Logs output 90 days before are archived using "archive_log.csp" on the day and time set in the "Archive settings" screen. Archived logs are deleted from the database.
  For details, refer to Archiving settings(306Page).
- When the amount of logs is large, two or more archives are created. A sequential number such as "_2" and "_3" is added to the end of the archive names of the second and subsequent archives.
- The maximum amount of logs that can be saved in one archive varies depending on the archive file format.
  If you change the settings file, you can change the maximum amount limit.
  For details, refer to How to change the maximum amount of logs stored in one archive(307Page).

- **XLSX format:**

  The maximum amount is 100,000 lines. The default setting is 100,000 lines.
- **CSV (UTF-8) or CSV (Shift-JIS) format:**

  The maximum amount is 500,000 lines. The default setting is 100,000 lines.

archive_log.csp

- archive_log.csp is the command used for archival. The following limitations apply:
  - Up to three weeks of logs can be retrieved in one archiving run.
  - The maximum amount of logs that can retrieved in one archiving run is 500,000 lines. You cannot change this value.
- You can also run archive_log.csp manually. When you manually run the command, you can archive up to 50 weeks of older logs.

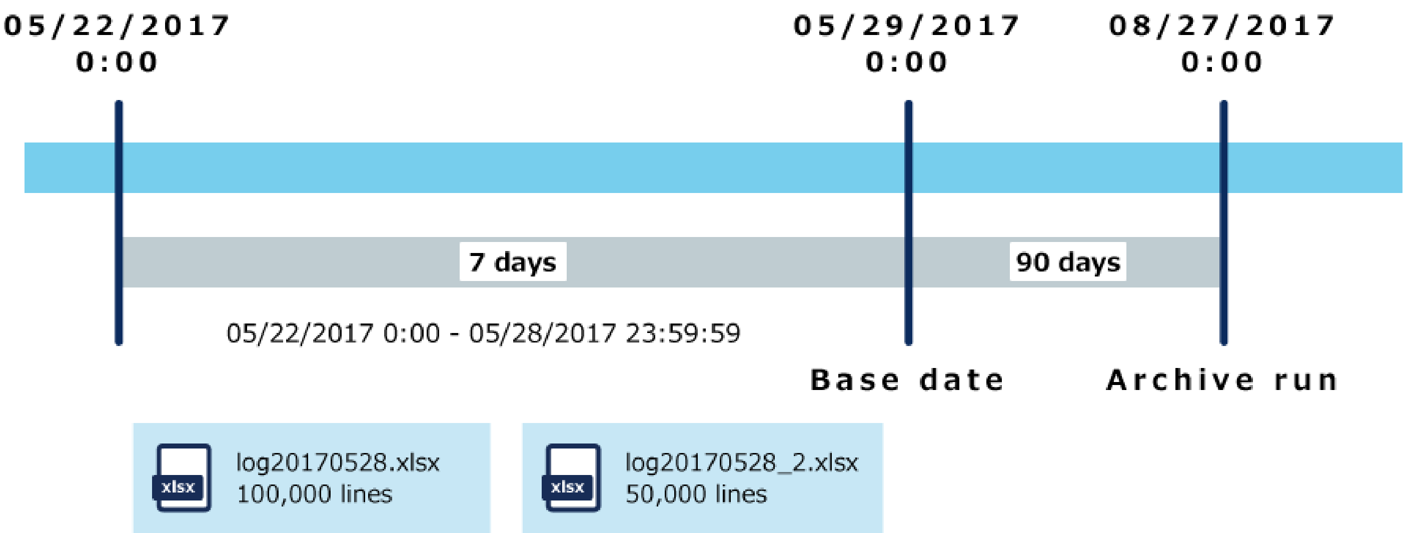
  For details, refer to how to archive logs(1733Page).

Archive Examples

Example A

This section contains an example of an archive that was created based on the following conditions:

- File format: XLSX
- Archive created: Sunday 0:00 am
- Archived date and time: 2017/08/27 0:00
- Base date (90 days before the archive date): 2017/5/29 0:00
- Logs output in 2017/05/22 0:00-2017/05/28 23:59:59 period: 150,000 lines

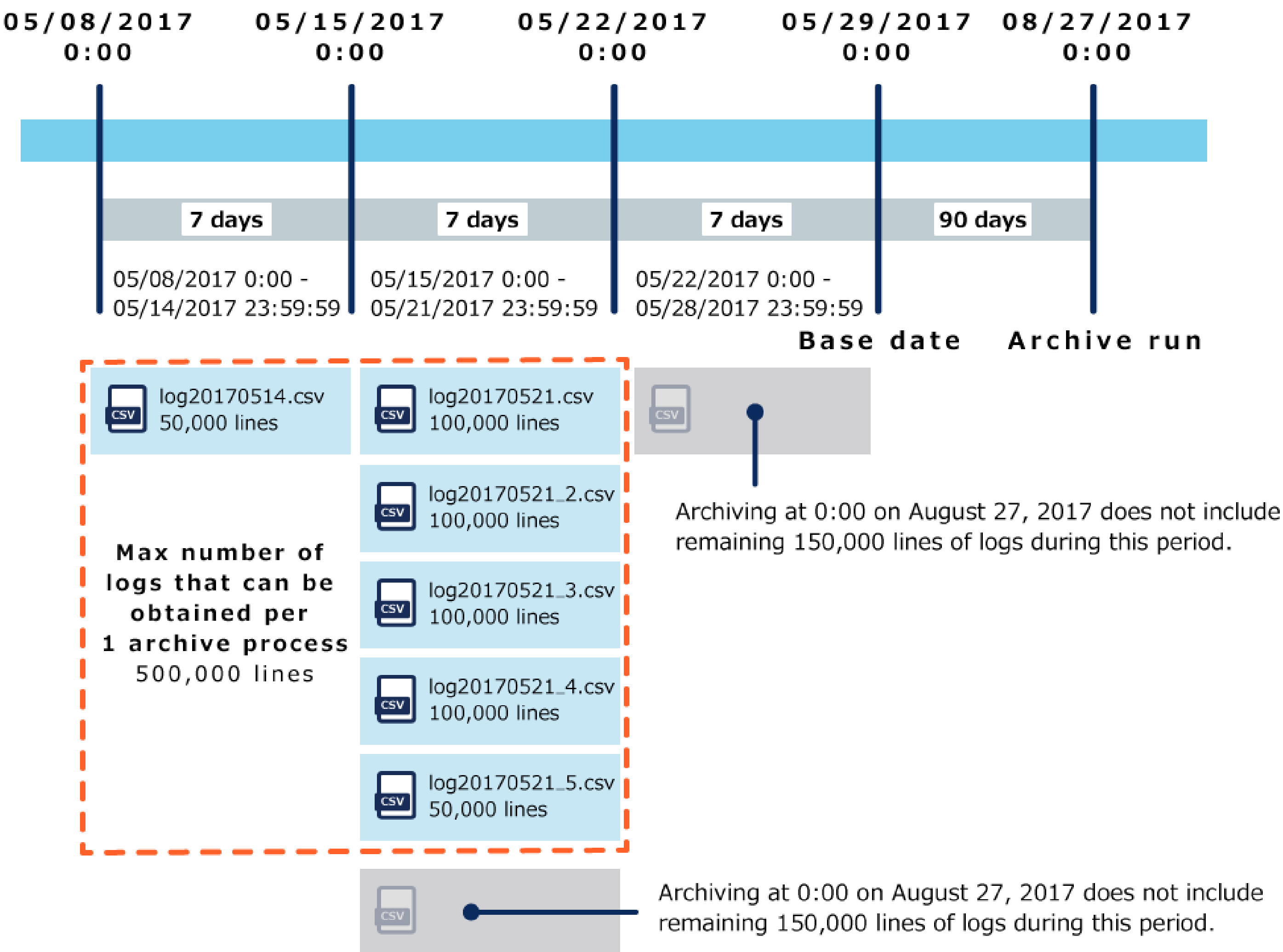


- Search the logs that were created in the past 90 days from the archived date/time of 2017/08/27 0:00, and create archives on weekly basis.
- When the file format is XLSX, up to 100,000 lines of logs can be saved in one archive.

- 2017/05/22 0:00 - 2017/05/28 23:59:59 - If the number of lines logged during this period (one week) reached 150,000, they will be saved in two archives.

Example B

- File format: CSV
- Archive created: Sunday 0:00 am
- Archived date and time: 2017/08/27 0:00
- Base date (90 days before the archive date): 2017/5/29 0:00
- Logs output in 2017/05/08 0:00 – 2017/05/28 23:59:59 period:
    - 2017/05/08 0:00 – 2017/05/14 23:59:59 Duration: 50,000 lines
    - 2017/05/15 0:00 – 2017/05/21 23:59:59 Duration: 600,000 lines
    - 2017/05/22 0:00 – 2017/05/28 23:59:59 Duration: 15 million lines



- Search the logs that were created in the past 90 days from the archived date/time of 2017/08/27 0:00, and create archives on weekly basis.
- When the archive format is CSV with the default setting, up to 100,000 lines of logs can be saved in one archive.
- If 2017/05/08 0:00 or later logs are left unarchived and the logs output for 2017/05/08 0:00 – 2017/05/14 23:59:59 are 50,000 lines, the logs will be saved in one archive.

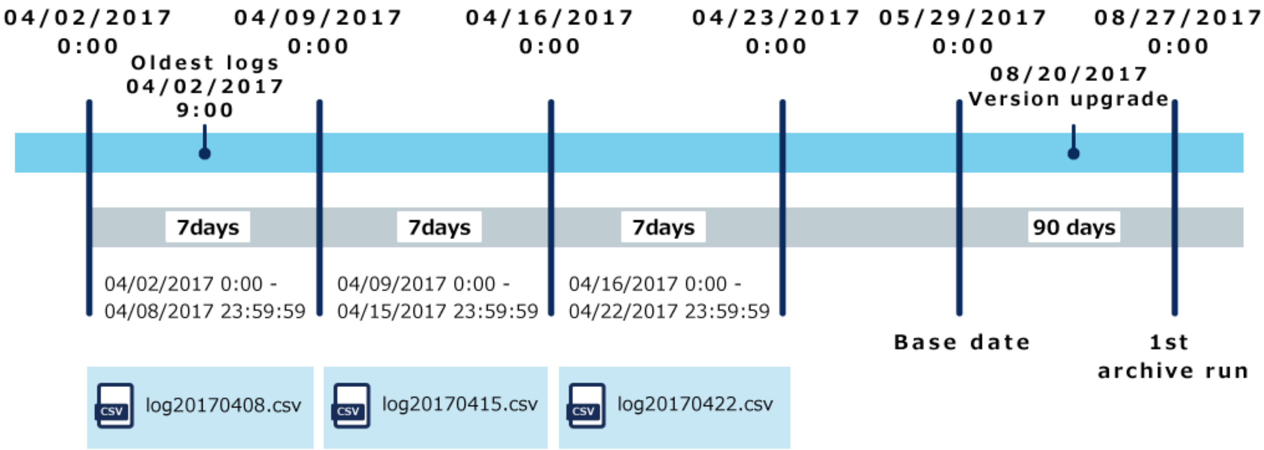
- 2017/05/15 0:00 - 2017/05/21 23:59:59 - If the number of lines logged during this period reached 600,000, they will be saved in five archives.
  However, the maximum amount of logs that can be retrieved in one archiving process is 500,000 lines.
  Since the 2017/05/08 0:00 – 2017/05/14 23:59:59 period has taken 50,000 lines of logs, the logs available for the 2017/05/15 0:00 – 2017/05/21 23:59:59 period are the 450,000 lines.
- 2017/05/15 0:00 - 2017/05/21 23:59:59 - 150,000 lines that could not be retrieved during this period and the logs created from 2017/05/22 0:00 to 2017/05/28 23:59:59 will not be archived at the regular run performed on 2017/08/27 0:00.

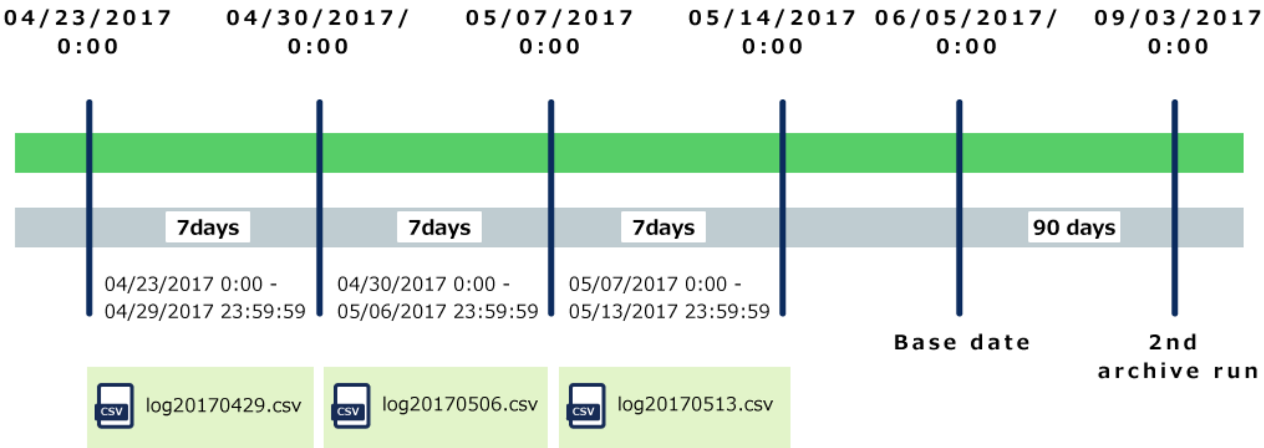
Handling of Old Logs Created with Earlier Version of Garoon Version 3.7.0

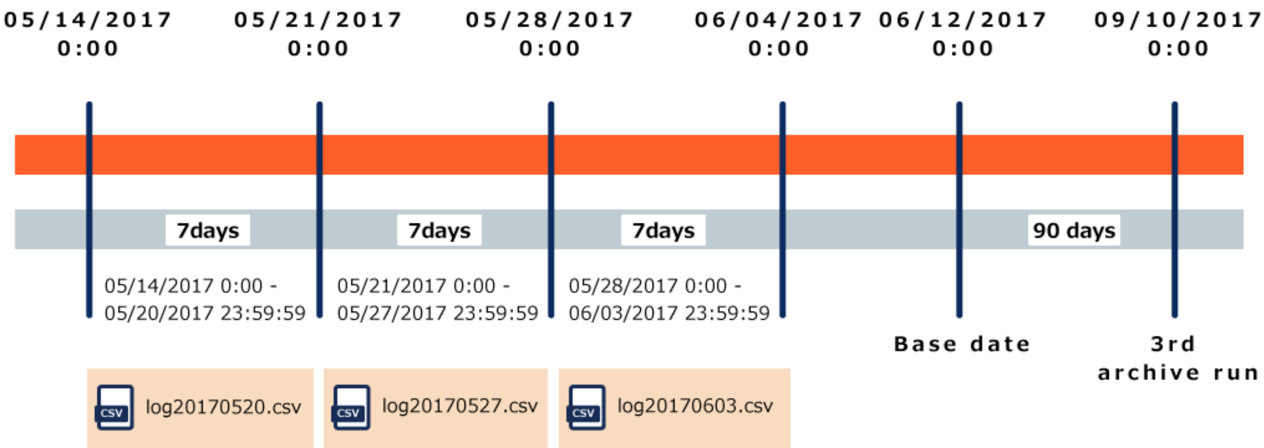
Version Garoon version 3.7.0 or later archives logs regularly (weekly), but Garoon versions prior to 3.7.0 do not have a function of archiving regularly.
This means that if you upgrade from Garoon earlier than version 3.7.0 to Garoon of version 3.7.0 or later, you will try to archive all logs stored in 3.7.0 earlier than Garoon. This task continues every week until there are no old logs.
The following conditions describe the case of upgrading.

- File format: CSV
- Updated on Garoon 4:2017/8/20
- Archive created: Sunday 0:00 am
- Oldest saved log date and time: 2017/04/02 09:00

The scope of logs that are archived for regular executions after upgrading are as follows







- Archive date and time: 2017/8/27 0:00
- Base date (90 days before date of execution): 2017/5/29 0:00

Range of logs being archived	Archive name
2017/04/02 9:00 - 2017/04/08 23:59:59	log20170408.csv
2017/04/09 0:00 - 2017/04/15 23:59:59	log20170415.csv

Range of logs being archived	Archive name
2017/04/16 0:00 - 2017/04/22 23:59:59	log20170422.csv

- Archive date and time: 2017/09/03 0:00
- Base date (90 days before date of execution): 2017/06/00

Range of logs being archived	Archive name
2017/04/23 0:00 - 2017/04/29 23:59:59	log20170429.csv
2017/04/30 0:00 - 2017/05/06 23:59:59	log20170506.csv
2017/05/07 0:00 - 2017/05/13 23:59:59	log20170513.csv

- Archive date and time: 2017/09/10 0:00
- Base date (90 days before date of execution): 2017/06/12 0:00

Range of logs being archived	Archive name
2017/05/14 0:00 - 2017/05/20 23:59:59	log20170520.csv
2017/05/21 0:00 - 2017/05/27 23:59:59	log20170527.csv
2017/05/28 0:00 - 2017/06/03 23:59:59	log20170603.csv

1.10.1.5. Checking Logs

The log retention period is set to "90 days" by default.
You can change the log retention period in the configuration file (common.ini) if necessary.
For details, refer to Changing the log retention period(305Page).
You can confirm log details in "View log" screen when they are within the log retention period. After the retention period has expired, logs can be confirmed only in the archives.

- Logs output within 90 days
  Check logs on the "View log" screen.

- Logs output 90 days ago
  Check logs by downloading archives.

Checking Logs Created in 90 Days

Check logs on the "View log" screen.

Caution

- This action may place a high load on the server that runs Garoon. We recommend that you perform this action during a period when fewer users access Garoon.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

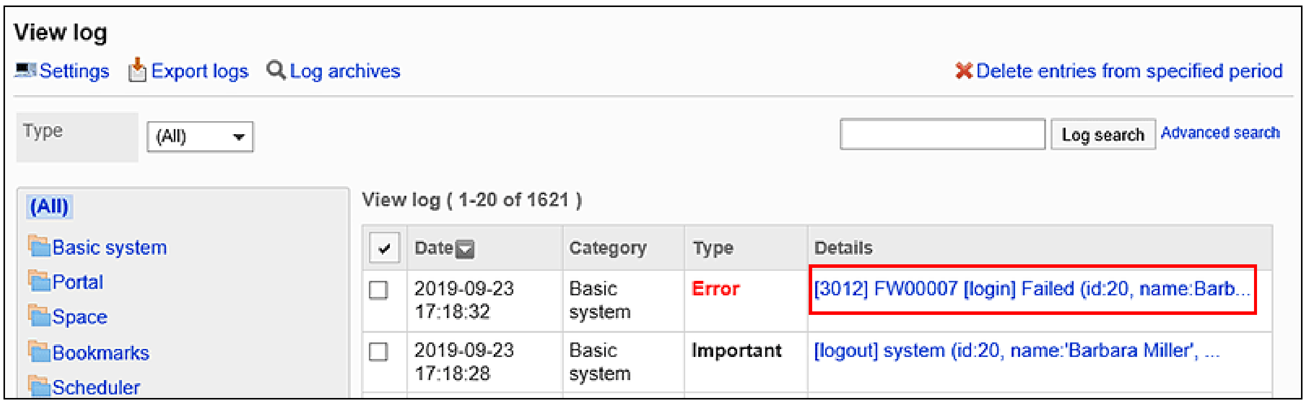
3. Select "Basic system administration" tab.

4. Click "Logging".

5. Click "Log List".

6. On the "Log List" screen, click the contents of the log.

You can filter the logs by category and type.



7. On the "Log Details" screen, check the log details.

[Action] Target (contents of log)

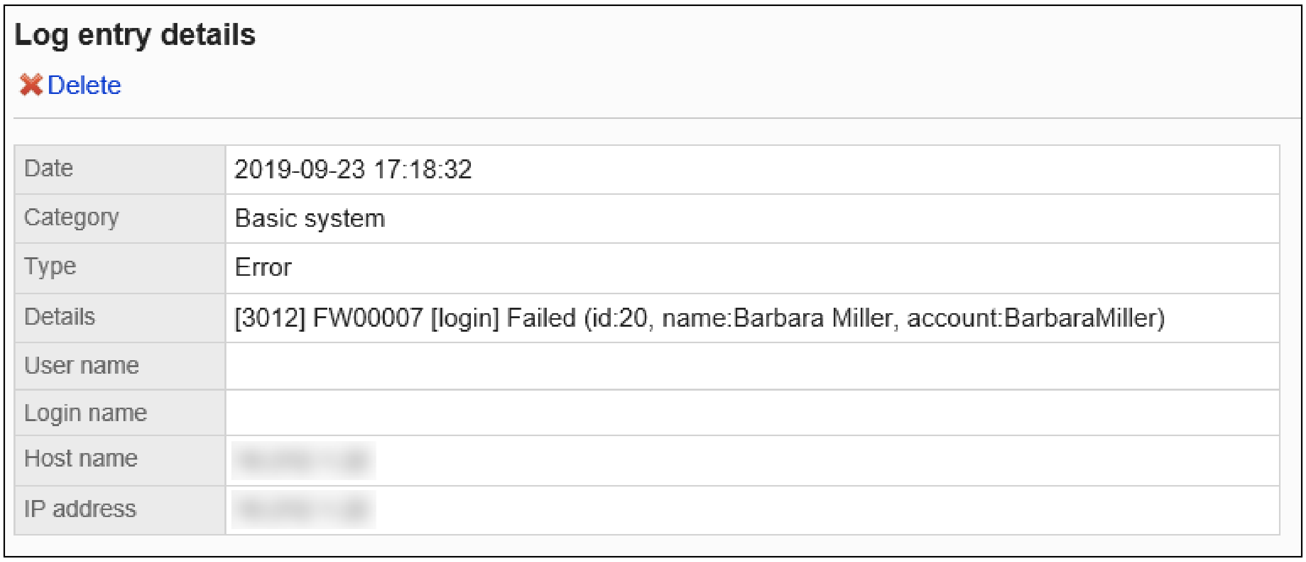
- Operation:

  Actions performed by the user. Bart Such as "registered", "delete", [edit], and "Browse".
- Target:

  The application name and module name are displayed.
- Log details

  The "Property: Value" format describes the user who performed the operation and the data targeted to the log. Values and values are separated by "," (comma) and spaces.

  For details on the contents of logs, refer to the list of output specifications for logs(316Page).

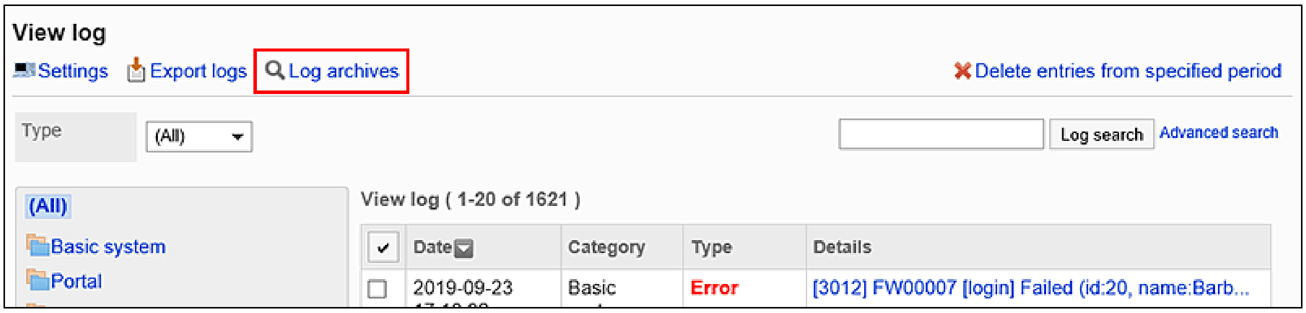


Checking Logs Created 90 or More Days Ago

To check logs output more than 90 days before, download archives.

Steps:

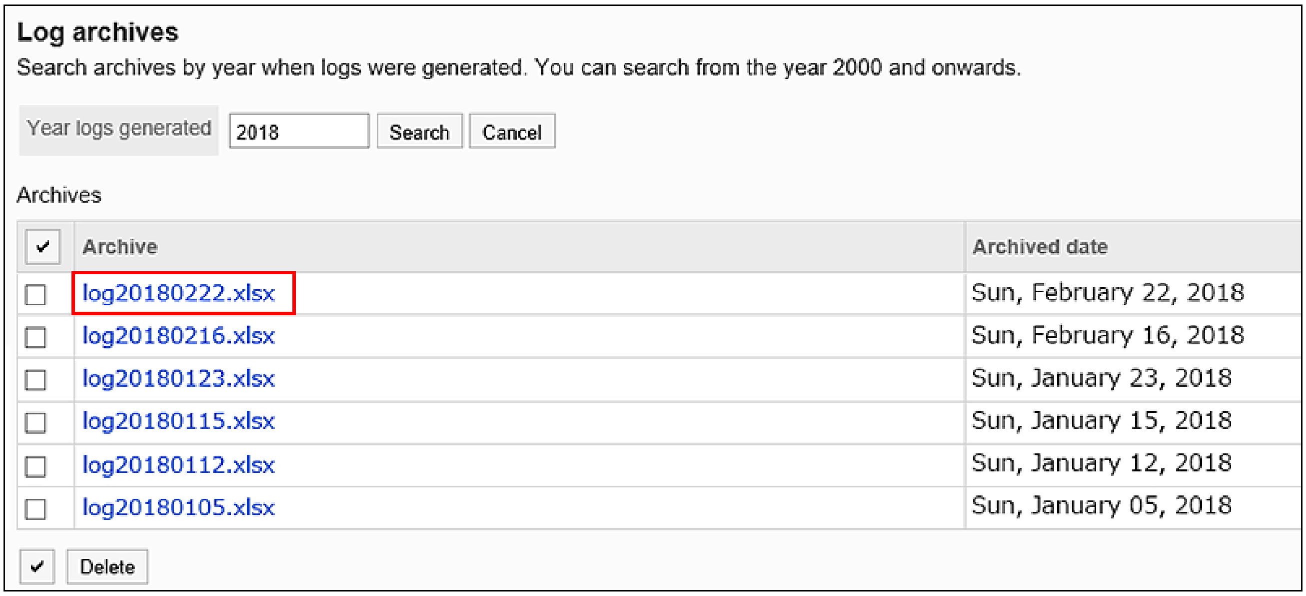
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Logging".**
5. **Click "Log List".**
6. **On the "Log List" screen, click "Show Archives".**



7. On the "Log Archive List" screen, click the archive name to download the archive.

The archive name is the date of the most recent log in the archive.

For details on archiving, refer to archiving settings(306Page).



1.10.1.6. List of Log Output Specifications

For details on user actions and the history (log) of program behavior associated with the operation, refer to the following page

Logs for Login and Logout(323Page)

Error Logs(324Page)

Basic System Logs(324Page)

Users and organizations logs(333Page)

Portal Logs(348Page)

Logs for Spaces(366Page)

Bookmark Logs(375Page)

Scheduler Logs(384Page)
Message Logs(413Page)
Bulletin Board Logs(417Page)
File Management Logs(426Page)
Memo Logs(432Page)
Phone Messages Logs(434Page)
Timesheet Logs(437Page)
To-Do List Logs(439Page)
Logs of Address Books(440Page)
E-mail Logs(455Page)
Logs of Cybozu Online Service(470Page)
Logs of Presence Indicators(472Page)
Logs of Favorites(475Page)
Log of Notifications(476Page)
Workflow Logs(477Page)
Logs of MultiReport(518Page)
KUNAI Logs(538Page)
Response Logs(540Page)
Cybozu Office/Dezie Connector Log(541Page)
Logs of Image Assets(542Page)
Logs of Personal Settings(542Page)
Command Operation Log(544Page)

1.10.1.7. Deleting Logs

Delete logs that are saved in the database and log archives.

Logs saved in system logs cannot be deleted.

Caution

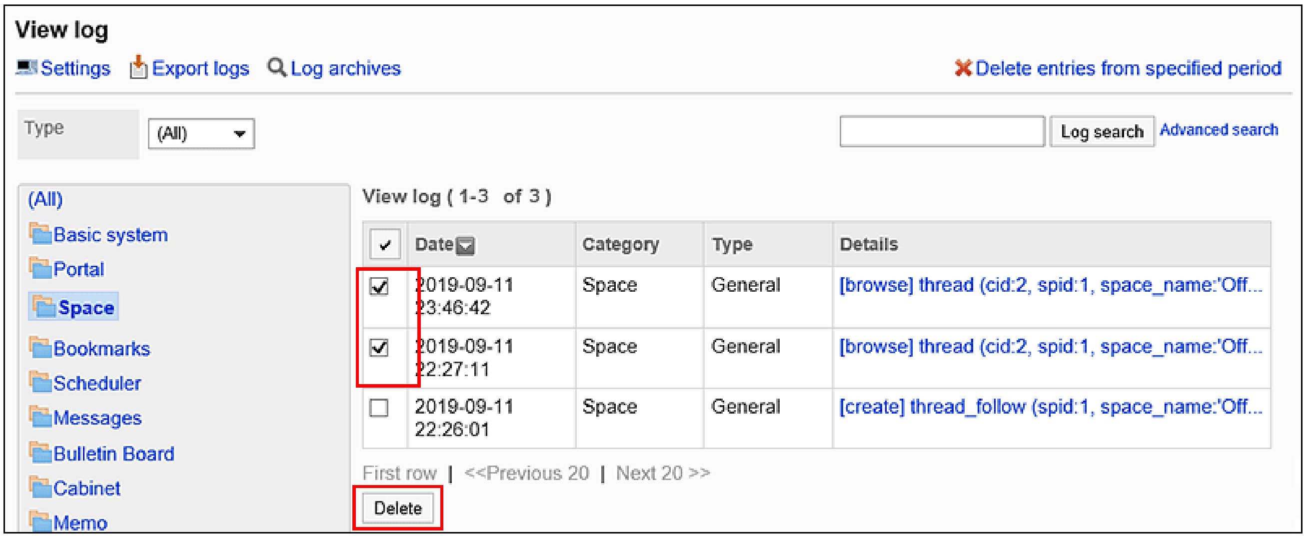
- Deleted log entries cannot be recovered.

Deleting Selected Logs

Individually delete logs that were output within the past three months.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Logging".**
5. **Click "Log List".**
6. **On the "Log List" screen, select the check boxes of the logs you want to delete, and then click "Delete".**
   You can filter the logs for deletion by category and type.



7. **Click "Yes" on the "delete log" screen.**

Note

- In step 6, you can delete logs by selecting the contents of the log you want to delete and clicking "Delete" on the "Log Details" screen.

Deleting Logs by Specifying the Category and Period

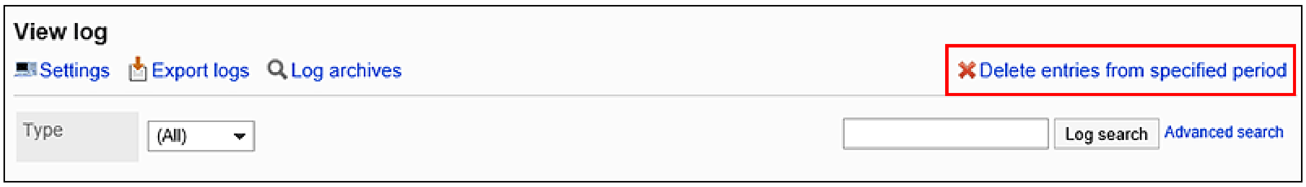
Delete all logs saved in the selected category before the specified date.

Caution

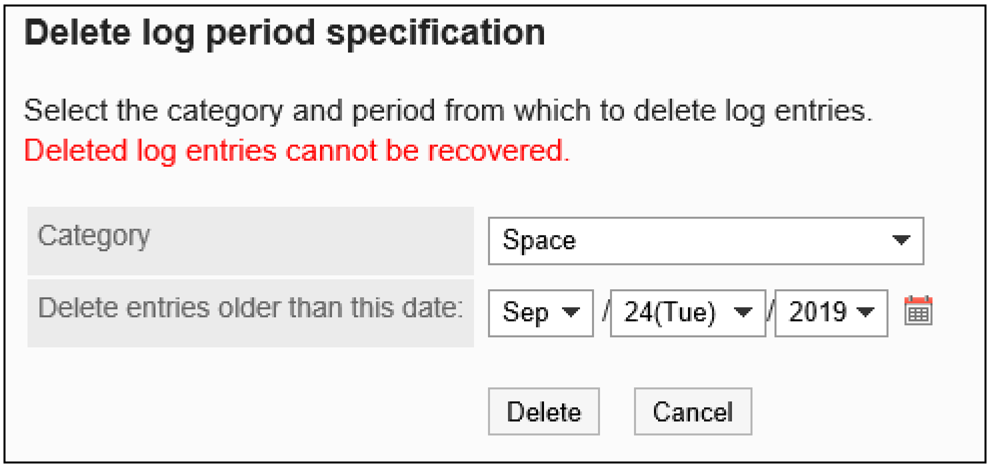
- This action may place a high load on the server that runs Garoon. We recommend that you perform this action during a period when fewer users access Garoon.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Logging".**
5. **Click "Log List".**
6. **On the "Log List" screen, click "Delete".**



7. **On the "log period specified deletion" screen, specify the log category and the period of time you want to delete, and then click "Delete".**
Logs that were output before the specified date are deleted.



8. **Click "Yes" on the "delete log period specified" screen.**

Deleting Archived Logs

Delete each archived log file individually.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

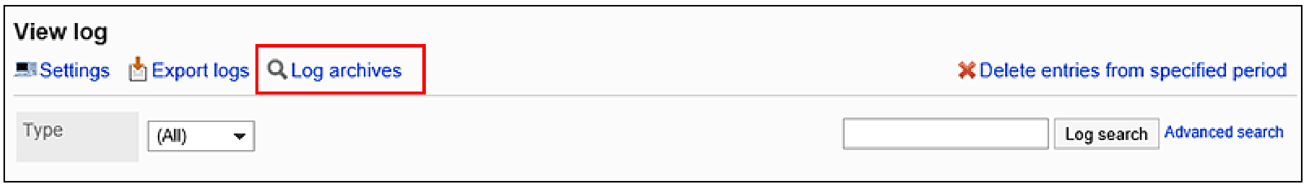
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Logging".**

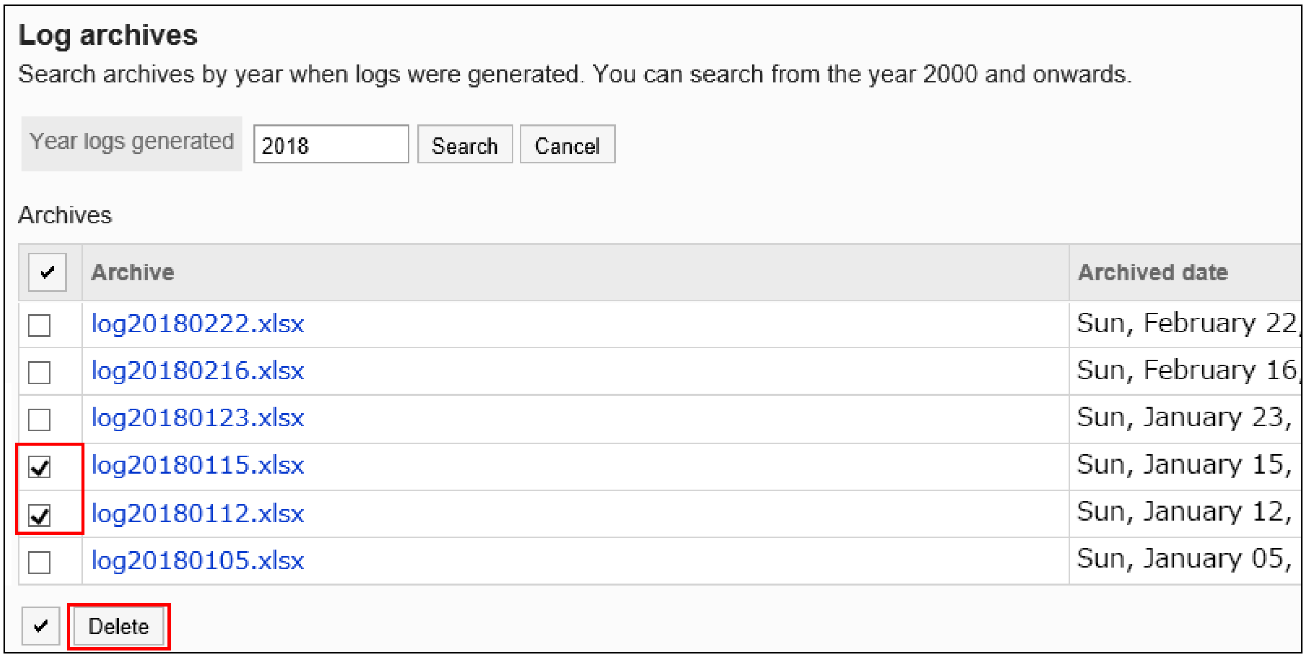
5. **Click "Log List".**

6. **On the "Log List" screen, click "Show Archives".**



7. **On the "Log Archive List" screen, select the check boxes of the archives you want to delete, and then click "Delete".**

You can search for an archive by the year the logs were output.



8. Click "Yes" on the "Delete archive" screen.

1.10.1.8. Managing Logs Using CSV Files

Export the Garoon logs to CSV files.

Only logs that are not archived can be exported to CSV files.

Caution

- This action may place a high load on the server that runs Garoon. We recommend that you perform this action during a period when fewer users access Garoon.

Exporting Data to a CSV File

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

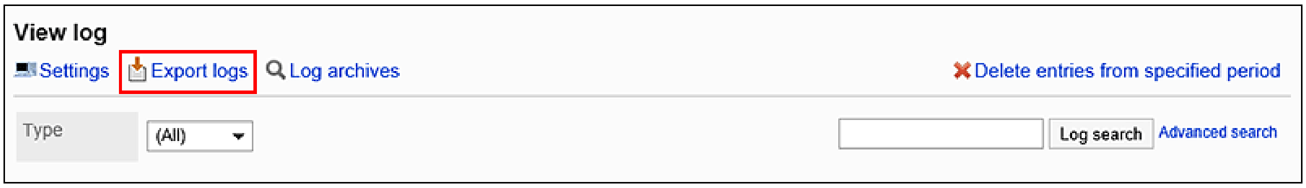
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

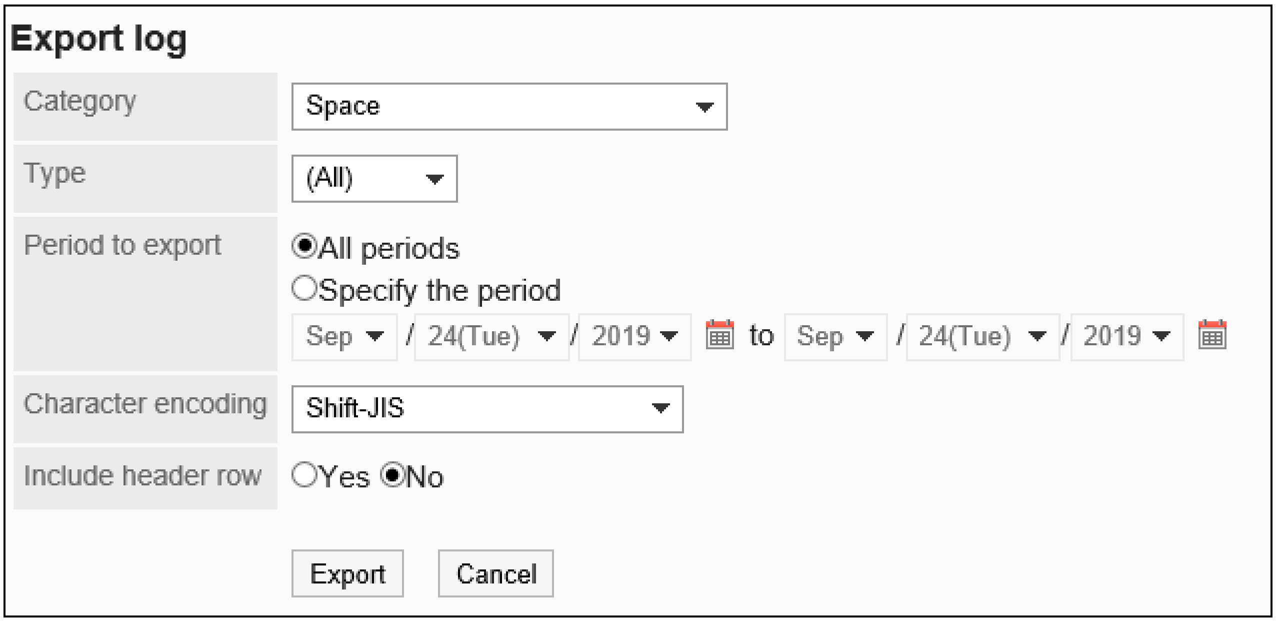
4. **Click "Logging".**

5. **Click "Log List".**

6. **On the "Log List" screen, click "Export Log".**



7. **Set the required items, and click "Export".**



- Category
- Target severity:

  The following types can be selected:
  - General
  - Important
  - Warning
  - Error

- Period to export:

  You can select one of the following options:
  - All periods: Select to output all unarchived logs.

  - Specify period: Specify the date, in which you want to export logs.

- Character encoding:
  Select the character code that you want to use for encoding.
  Following character codes can be selected.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".

8. Check your settings and click "Export".

9. Save the file with a function provided by your Web browser.

1.10.2. Logs for Login and Logout

Action	Level	log
Login Success	Important	[login] system (id:**, name:**, account:**)
Failed to log in (password issue)	Error	Process ID error number [login] Failed (ID: * *, Name: * *, Account: * *)
Failed to log in (user does not exist)	Error	Process ID error number [login] Failed (account: * *)
Logout	Important	[logout] system (id:**, name:**, account:**)

Properties	Meaning	Remarks
id	User ID	
name	User name	

Properties	Meaning	Remarks
account	Login name	

1.10.3. Error Logs

Action	Level	log
Actions that cause an error	Error	Process ID Error number

1.10.4. Basic System Logs

This section describes the basic system logs.

References

- Logs of Users Settings(325Page)
- Logs of Office Settings(327Page)
- Locale Settings Log(330Page)
- Logs of Proxy API Settings(331Page)
- Logs of JavaScript and CSS Customization(332Page)

1.10.4.1. Logs of Application User Settings

User Settings

Action	Level	log
Adding users	Important	[add] availability_user_add (user_**:'space:*, link:*, schd:*, mssg:*, bllt:*, cbnt:*, phnm:*, tmcr:*, addr:*, mail:*, wrkf:*, rprt:*')
Changing users	Important	[modify] availability_user_modify (**:'space:*, link:*, schd:*, mssg:*, bllt:*, cbnt:*, phnm:*, tmcr:*, addr:*, mail:*, wrkf:*, rprt:*')
Deleting users	Important	[delete] availability_user_delete_multi (user:**)
Delete all Users	Important	[delete] availability_user_delete_all

Properties	Meaning	Remarks
addr	Permission to use the Address Book	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
bllt	Permission to use bulletin board	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
cbnt	Permission to use the file administration	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
link	Permission to use links	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
mail	Permission to use e-mail	One of the following values is displayed: • 0 (do not allow)

Properties	Meaning	Remarks
		• 1 (Allow)
mssg	Permission to use messages	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
phnm	Permission to use phone messages	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
rprt	Permission to use Multireport.	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
schd	Permission to use the scheduler	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
tmcr	Permission to use the timecard.	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
wrkf	Permission to use workflow	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)

Remote Access Rule

Action	Level	log
Change remote access rule	Important	[modify] external_use_permit (mode:'**', ip_address:'**', ip_address:'**')
Import IP addresses	Important	[import] external_use_permit (ip_address:'**', ip_address:'**')

Action	Level	log
Export IP addresses	Important	[export] external_use_permit (ip_address:'**', ip_address:'**')

Properties	Meaning	Remarks
ip_address	IP addresses registered with Garoon	
mode	Remote access rule	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)

Importing Application Users

Action	Level	log
Import a CSV file	Important	[import] availability_user_import

Exporting Application Users

Action	Level	Log
Export to CSV File	Important	[export] availability_user_export

1.10.4.2. Office Settings Logs

Action	Level	log
Adding Offices	Important	[create] base (id:**, name:'**', code:'**', workday_sunday:'**', workday_monday:'**',

Action	Level	log
		workday_tuesday:'**', workday_wednesday:'**', workday_thursday:'**', workday_friday:'**', workday_saturday:'**', apply_calendar:'**', calendar:'**')
Change Office	Important	[modify] base (id:**, name:'**', code:'**', workday_sunday:'**', workday_monday:'**', workday_tuesday:'**', workday_wednesday:'**', workday_thursday:'**', workday_friday:'**', workday_saturday:'**', apply_calendar:'**', calendar:'**')
Delete Office	Important	[delete] base (id:**, name:'**', code:'**', workday_sunday:'**', workday_monday:'**', workday_tuesday:'**', workday_wednesday:'**', workday_thursday:'**', workday_friday:'**', workday_saturday:'**', apply_calendar:'**', calendar:'**')
Adding uptime	Important	[create] base_work_hours (base_id:**, start:'**', end:'**')
Add display name	Important	[create] base_local (base_id:**, language_code:'**', name:'**')
Change display name	Important	[modify] base_local (base_id:**, language_code:'**', name:'**')
Delete display name	Important	[delete] base_local (base_id:**, language_code:'**', name:'**')

Properties	Meaning	Remarks
apply_calendar	Applying a calendar work day	
base_id	Office ID	
calendar	Calendar Code	
code	Office Code	

Properties	Meaning	Remarks
end	End time of working time	
id	Office ID	
name	Office Name	
start	Start time	
workday_friday	Friday (working day)	One of the following values is displayed: • 0 (Nonworking day) • 1 (working day)
workday_monday	Monday (working day)	One of the following values is displayed: • 0 (Nonworking day) • 1 (working day)
workday_saturday	Saturday (working day)	One of the following values is displayed: • 0 (Nonworking day) • 1 (working day)
workday_sunday	Sunday (working day)	One of the following values is displayed: • 0 (Nonworking day) • 1 (working day)
workday_thursday	Thursday (working day)	One of the following values is displayed: • 0 (Nonworking day) • 1 (working day)
workday_tuesday	Tuesday (working day)	One of the following values is displayed: • 0 (Nonworking day) • 1 (working day)
workday_wednesday	Wednesday (working day)	One of the following values is displayed: • 0 (Nonworking day)

Properties	Meaning	Remarks
		• 1 (working day)

1.10.4.3. Locale Settings Logs

Action	Level	log
Adding locales	Important	[create] locale (id:**, name:'**', code:'**', language_code:'**', long_date_format:'**', short_date_format:'**', time_format:'**')
Changing locales	Important	[modify] locale (id:**, name:'**', code:'**', language_code:'**', long_date_format:'**', short_date_format:'**', time_format:'**')
Deleting locales	Important	[delete] locale (id:**, name:'**', code:'**', language_code:'**', long_date_format:'**', short_date_format:'**', time_format:'**')
Add display name	Important	[create] locale_local (locale_id:**, language_code:'**', name:'**')
Change display name	Important	[modify] locale_local (locale_id:**,language_code:'**', prev_locale_name:'**', new_locale_name:'**')
Delete display name	Important	[delete] locale_local (locale_id:**, language_code:'**', name:'**')

Properties	Meaning	Remarks
code	Locale Code	
id	Locale ID	

Properties	Meaning	Remarks
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
locale_id	Locale ID	
long_date_format	Long Date Format	
name	Standard locale Name Display name for each language	
short_date_format	Short Date Format	
time_format	Time Format	

1.10.4.4. Proxy API Settings Logs

Action	Level	log
Adding a proxy API	Information	[create] proxy_api (id:**, code:'**')
Changing the proxy API	Information	[modify] proxy_api (id:**, code:'**')
Deleting proxy APIS	Information	[delete] proxy_api (id:**, code:'**')

Properties	Meaning	Remarks
code	Proxy code	
id	Proxy ID	

1.10.4.5. JavaScript/CSS Customization Logs

Action	Level	Log
Add customization group	Important	[add] customization_group (id:X, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Edit customization group	Important	[modify] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Delete customization group	Important	[delete] customization_group (id:*, name:'**', apply_status:'**', rid_1:*,oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)

Properties	Meaning	Remarks
apply_status	JavaScript and CSS customization	
Integers starting with Css_	Files and links to be applied in CSS customization	
id	Customization group ID	

Properties	Meaning	Remarks
Integers starting with Js_	Files and links to be applied in CSS customization	
name	Customization group name	
oid	Organization ID	
rid	Role ID	
uid	User ID	

1.10.5. Logs of Users and Organizations

Describes logs for users and organizations.

References

- User logs(334Page)
- Organization Logs(336Page)
- Role Logs(341Page)
- User Information Item Log(343Page)
- Organization Tentative Log(344Page)

1.10.5.1. User Logs

Users

Action	Level	log
Adding Users	Important	[create] user (uid:**, name:**, account:**)
Changing users	Important	[modify] user (uid:**, name:**, account:**)
Deleting Users	Important	[delete] user (uid:**, name:**, account:**)
Deleting user data	Important	[permanent delete] user (uid:**, name:'**', account:'**')
Recovering user Data	Important	[restore] user (uid:**, name:'**', account:'**')
Start using users	Important	[activate] user (uid:**)
Organization Settings	Important	[belong] user (uid:**, gids:'**, **, **')
Setting up a possession role	Important	[assign] user (uid:**, rids:'**, **, **')

Properties	Meaning	Remarks
account	Login name	
gids	Group ID (multiple)	
groups	Group Key (s)	
name	User name	
uid	User ID	
user	User Accounts	

User Information

Action	Level	Log
Import from CSV File	Important	[import] user (uid:**, name:**, account:**)
Export to CSV file	Important	[export] user (uid:**, name:**, account:**)

Properties	Meaning	Remarks
account	Login name	
name	User name	
uid	User ID	

Organization Membership

Action	Level	Log
Import from CSV File	Important	[import_group] user (uid:**, gids:'**, **, **')
Export to CSV file	Important	[export_group] user (user:**, groups:'**, **, **')

Properties	Meaning	Remarks
gids	Group ID (multiple)	
groups	Group Key (s)	
uid	User ID	
user	User Accounts	

Role in Possession

Action	Level	Log
Import from CSV File	Important	[import_role] user (uid:**, rids:'**, **, **')
Export to CSV file	Important	[export_role] user (user:**, roles:'**, **, **')

Properties	Meaning	Remarks
rids	Role ID (s)	
roles	Role Key (s)	
uid	User ID	
user	User Accounts	

1.10.5.2. Organization Logs

Organization

Action	Level	log
Adding Organizations	Important	[create] group (gid:**, name:**, foreign_key:**, memo:**)
Changing Organizations	Important	[modify] group (gid:**, name:**, foreign_key:**, memo:**)
Move organizations	Important	[move] group (gid:**, pgid:**)
Delete organizations	Important	[delete] group (gid:**, name:**, foreign_key:**)
Reorder Organizations	Important	[order] group (pgid:**, gid:**, list_inde***)
Assign Users	Important	[assign] group (gid:**, uids:'**, **, **')
Remove a user from the organization.	Important	[delete_assign] group (gid:**, uids:'**, **, **')

Properties	Meaning	Remarks
foreign_key	Organization code	
gid	Organization ID	
group	Organization code	
list_index	Order	
memo	Memo	
name	Organization name data	
pgid	Parent Organization ID	
uids	User ID	

Organization Details

Action	Level	Log
Import from CSV File	Important	[import] group (gid:**, name:**, foreign_key:**, parent:**)
Export to CSV file	Important	[export] group (gid:**, name:**, foreign_key:**, parent:**)

Properties	Meaning	Remarks
foreign_key	Organization code	
gid	Organization ID	
group	Organization code	
name	Organization name data	

Properties	Meaning	Remarks
parent	Parent Organization Code	

Organization Name

Action	Level	log
Add display name	Important	[create] group_local (gid:**, language_code:'**', group_name:'**')
Change display name	Important	[modify] group_local (gid:**, language_code:'**', prev_group_name:'**', next_group_name:'**')
Delete display name	Important	[delete] group_local (gid:**, language_code:'**', group_name:'**')
Importing from a CSV file (added)	Important	[import] group_local (gid:**, language_code:'**', group_name:'**')
Import (change) from a CSV file	Important	[import] group_local (gid:**, language_code:'**', prev_group_name:'**', next_group_name:'**')
Import from CSV file (delete)	Important	[import_delete] group_local (gid:**, language_code:'**', group_name:'**')
Export to CSV file	Important	[export] group_local (gid:**, languageCode:'**', group_name:'**')

Properties	Meaning	Remarks
gid	Organization ID	
group	Organization code	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese)

Properties	Meaning	Remarks
		• zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
languageCode	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
name	Organization name data	
next_group_name	Organization display name after the change	
prev_group_name	Organization display name before the change	

Members

Action	Level	Log
Import from CSV File	Important	[import_user] group (gid:**, uids:'**, **, **')
Export to CSV file	Important	[export_user] group (group:**, users:'**, **, **')

Properties	Meaning	Remarks
gid	Organization ID	
group	Organization code	

Properties	Meaning	Remarks
uids	User ID	
users	User Accounts	

Operational Administrative Privileges

Action	Level	Log
Adding operational administrative privileges	Important	[create] privilege (gid:**, uid/priv_gid/rid/dynamic_role:**, name:**)
Change operational Administrative Privileges	Important	[modify] privilege (gid:**, uid/priv_gid/rid/dynamic_role:**, name:**)
Delete Operational Administrative Privileges	Important	[delete] privilege (gid:**, uid/priv_gid/rid/dynamic_role:**, name:**)
Delete all operational administrative privileges	Important	[delete_all] privilege (gid:**, name:**)

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	One of the following values is displayed: • Everyone • LoginUser
gid	Organization ID	
name	Organization name data	
priv_gid	Organization ID	
rid	Role ID	

Properties	Meaning	Remarks
uids	User ID	

1.10.5.3. Role Logs

Selecting User Roles

Action	Level	log
Change permission to select roles	Important	[config]role(permission_to_select_role:'**')

Properties	Meaning	Remarks
permission_to_select_role	Permission to select roles	One of the following values is displayed: • off (Do not allow) • on (Allow)

Role

Action	Level	log
Adding Roles	Important	[create] role (rid:**, foreign_key:**, memo:**)
Changing Roles	Important	[modify] role (rid:**, foreign_key:**, memo:**)
Deleting Roles	Important	[delete] role (rid:**)
Delete all roles	Important	[delete_all] role
Reorder Roles	Important	[order] role (role_id:**)
Force a role	Important	[assign] role (rid:**, uids:'**, **, **')

Action	Level	log
Remove from the belonging of a loin	Important	[delete_assign] role (rid:**, uids:'**, **, **')
Import from CSV file	Important	[import] role (rid:**, foreign_key:**)
Export to CSV file	Important	[export] role (rid:**, foreign_key:**)

Properties	Meaning	Remarks
foreign_key	Role name	
memo	Memo	
rid	Role ID	
role_id	Order	
uids	User ID	

User Data by Role

Action	Level	Log
Import from CSV File	Important	[import_user] role (rid:**, uids:'**, **, **')
Export to CSV file	Important	[import_user] role (rid:**, uids:'**, **, **')

Properties	Meaning	Remarks
rid	Role ID	
uids	User ID	
users	User Accounts	

1.10.5.4. Logs of User Profile Items

Action	Level	log
Adding items in User information	Important	[create] user_item (cid:**, display_name:**, type:**, id:**, use:**, necessary:**, not_modify:**, show:**, display:**, sso:**)
Changing built-in fields	Important	[modify] user_item_default (key:**, display_name:**, use:**, necessary:**, not_modify:**, show:**, display:**, sso :**)
Changing custom items	Important	[modify] user_item (cid:**, display_name:**, type:**, id:**, use:**, necessary:**, not_modify:**, show:**, display:**, sso:**)
Deleting items in User information	Important	[delete] user_item (cid:**)
Reorder items in User information	Important	[order] user_item (cids:'**, **, **')

Properties	Meaning	Remarks
cid	User Information Item ID	
cids	User Information Item ID	
display	List view	One of the following values is displayed: • 0 (does not appear) • 1 (view)
display_name	Item name	
id	Item code	
necessary	Required Field	One of the following values is displayed: • 0 (Do not set required fields)

Properties	Meaning	Remarks
		• 1 (Required fields)
not_modify	Users cannot change settings	One of the following values is displayed: • 0 (cannot be changed) • 1 (can be changed)
show	Make public	One of the following values is displayed: • 0 (not published) • 1 (to be published)
sso	Single Sign-On	One of the following values is displayed: • 0 (not set) • 1 (set)
type	Type	
use	Enable	One of the following values is displayed: • 0 (not used) • 1 (use)

1.10.5.5. Tentative Reorganization Log

Tentative Reorganization

Action	Level	log
Creates a tentative structure	Important	[create] sandbox
Deletes tentative structures	Important	[delete] sandbox

Action	Level	log
Set the date and time to apply the tentative strucutre	Important	[preset] sandbox-application-date (datetime:'yyyy-mm-dd hh:mm:ss')
Cancel the date and time to apply the tentative strucutre	Important	[cancel] sandbox-application-date
Apply	Important	[apply] sandbox
Apply to the scheduling service	Important	[apply sched] sandbox

Properties	Meaning	Remarks
datetime	The task will be performed at the specified date and time	

Organization

Action	Level	log
Adding Organizations	Important	[create] sandbox-group (gid:**, name:'**', foreign_key:**, memo:**)
Add display name	Important	[create] sandbox-group_local (gid:**, language_code:'**', group_name:'**')
Change display name	Important	[modify] sandbox-group_local (gid:**, language_code:'**', prev_group_name:'**', next_group_name:'**')
Delete display name	Important	[delete] sandbox-group_local (gid:**, language_code:'**', group_name:'**')
Edit organization details	Important	[modify] sandbox-group (gid:**, name:'**', foreign_key:**, memo:**)
Move organizations	Important	[move] sandbox-group (gid:**, pgid:**)

Action	Level	log
Reorder Organizations	Important	[order] sandbox-group (pgid:**, gid:**, list_inde**X)
Delete organizations	Important	[delete] sandbox-group (gid:**, name:'**', foreign_key:'**')

Properties	Meaning	Remarks
foreign_key	Organization code	
gid	Organization ID of the target organization	
group_name	Organization name data	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
list_index	Organization Order	
memo	Notes on organization information	No logs will be output when Notes is empty.
name	Organization name data	
next_group_name	The name of the organization after the change	

Properties	Meaning	Remarks
pgid	Organization ID of the destination parent organization	
prev_group_name	Organization name before the change	

Users

Action	Level	log
Start using users	Important	[activate] sandbox-user (uid:**)
Editing User Profile	Important	[modify] sandbox-user (uid:**, name:**, account:**)
Change organization membership	Important	[belong] sandbox-user (uid:**, gids:'**, **')
Change roles	Important	[assign] sandbox-user (uid:**, rids:'**, **')
Assigning Users to a Tentative Organization	Important	[assign] sandbox-group (gid:**, uids:'**, **, **')
Remove a user from the organization	Important	[delete_assign] sandbox-group (gid:**, uids:'**, **, **')

Properties	Meaning	Remarks
gid	Organization ID of the target organization	
gids	Organization ID of the target organization	
name	User name	
rids	Role ID	

Properties	Meaning	Remarks
uid	User ID	
uids	User ID	

1.10.6. Portal Logs

System Administration

Portal List

Action	Level	log
Adding Portals	Important	[create] portal (pid:**, portal_name:**)
Changing default portal Name	Important	[modify] portal (pid:**, prev_portal_name:**, next_portal_name:**)
Adding Portal Display Names	Important	[create] portal_local (pid:**, language_code:'**', portal_name:'**')
Changing the display name added to the portal	Important	[modify] portal_local (pid:**, language_code:'**', prev_portal_name:'**', next_portal_name:'**')
Deleting a display name that has been added to the portal	Important	[delete] portal_local (pid:**, language_code:'**', portal_name:'**')
Making Portals Public	Important	[modify] portal (pid:**, portal_name:'**', open_status:'**')
Deleting Portals	Important	[delete] portal (pid:**, portal_name:'**')
Changing portal security Model	Important	[modify] portal_access (pid:**, portal_name:'**', security_model:'**')

Action	Level	log
Adding Portal Permissions	Important	[create] portal_access (pid:**, uid/gid/rid/ dynamic_role:**, portal_name:'**')
Delete Portal Permissions	Important	[delete] portal_access (pid:**, uid/gid/rid/ dynamic_role:**, portal_name:'**')
Adding a Portlet	Important	[create] portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**', layout:'**')
Making Portlets Public	Important	[modify] portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**', open_status:'**')
Changing the default portlet name	Important	[modify] portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', prev_portlet_name:'**', next_portlet_name:'**')
Adding a display name for a portlet	Important	[create] portlet_layout_local (plid:**, language_code:'**', portlet_layout_name:'**')
Changing the display name added to the Portlet	Important	[modify] portlet_layout_local (plid:**, language_code:'**', prev_portlet_layout_name:'**', next_portlet_layout_name:'**')
Deleting a display name added to a portlet	Important	[delete] portlet_layout_local (plid:**, language_code:'**', portlet_layout_name:'**')
Select design of "Notifications" portlet	Important	[system_portlet_config] whatsnew_portlet_set (plid:**, display_items:'abstract/sender_name/timestamp', display_style:'**', grn.space:'index/5/order=0', grn.schedule:'index/5/order=1', grn.message:'index/5/ order=2', grn.bulletin:'index/5/order=3', grn.cabinet:'index/5/order=4', grn.phonemessage:'index/5/order=5', grn.mail:'index/5/ order=6', grn.workflow:'index/5/order=7', grn.report:'index/5/order=8', x.1:'index/5/order=9')
Move a Portlet	Important	[move] portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**', layout:'**')

Action	Level	log
Reorder portlets	Important	[order] portal_portlet
Deleting portlets	Important	[delete] portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**')
Changing the security model of a portlet	Important	[modify] portlet_access (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**' security_model:'**')
Adding a portlet user right	Important	[create] portlet_access (pid:**, plid:**, ppid:**, uid/gid/rid/dynamic_role:**, portal_name:**, portlet_name:**)
Deleting permissions for Portlets	Important	[delete] portlet_access (pid:**, plid:**, ppid:**, uid/gid/rid/dynamic_role:**, portal_name:'**', portlet_name:'**')

Properties	Meaning	Remarks
display_style	Design of "Notifications" portlet	
dynamic_role	Dynamic Role Key	One of the following values is displayed: • Everyone • LoginUser
gid	Organization ID	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
layout	Layout	Displays one of the following values: • top

Properties	Meaning	Remarks
		• left • center • right
next_portal_name	Changed portal name	
next_portlet_layout_name	The type name of my portlet after the change	
next_portlet_name	Portlet name after the change	
open_status	Portal Visibility Settings	One of the following values is displayed: • open • close
pid	Portal ID	
plid	Portlet Layout ID	
portal_name	Portal Name	
portlet_layout_name	My Portlet's name	
portlet_name	Portlet	
ppid	Portlet ID	
prev_portal_name	Portal Name	
prev_portlet_layout_name	The type name of my portlet before the change	
prev_portlet_name	The name of the pre-change portlet	

Properties	Meaning	Remarks
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant
uid	User ID	

Default Portal

Action	Level	log
Default portal setting	Important	[config] portal_firstview (pid:**, pgd:**, portal_name:'**', group_name:'**')

Properties	Meaning	Remarks
group_name	Organization name data	
pgd	Organization ID	
pid	Portal ID	
portal_name	Portal Name	

Permissions for Setting of Default Portal

Action	Level	Log
Change security model	Important	[modify] my_first_portal_access (security_model:'**')
Add permissions	Important	[add] my_first_portal_access (uid/gid/rid:**)
Delete permissions	Important	[delete] my_first_portal_access (uid/gid/rid:**)

Properties	Meaning	Remarks
gid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant
uid	User ID	

Portal Display Order

Action	Level	log
Changing the order of display	Important	[order] portal

My Portal

Action	Level	log
Add My Portal	Important	[create] template_portal (pid:**)
Initialize My portal	Important	[delete] template_portal (pid:**)
Adding a Portlet	Important	[create] template_portal_portlet (pid:**, plid:**, ppid:**, portlet_name:'**', layout:'**')
Changing the default portlet name	Important	[modify] template_portal_portlet (pid:**, plid:**, ppid:**, prev_portlet_name:'**', next_portlet_name:'**')
Move a Portlet	Important	[move] template_portal_portlet (pid:**, plid:**, ppid:**, portlet_name:'**', layout:'**')
Deleting portlets	Important	[delete] template_portal_portlet (pid:**, plid:**, ppid:**, portlet_name:'**')
Adding a display name for my portal	Important	[create] template_portlet_layout_local (plid:**, language_code:'**', portlet_layout_name:'**')

Action	Level	log
Changed the display name added to the stationery on my portal	Important	[modify] template_portlet_layout_local (plid:**, language_code:'**', prev_portlet_layout_name:'**', next_portlet_layout_name:'**')
Removed the display name added to the stationery on my portal	Important	[delete] template_portlet_layout_local (plid:**, language_code:'**', portlet_layout_name:'**')

Properties	Meaning	Remarks
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
layout	Layout	Displays one of the following values: • top • left • center • right
next_portlet_layout_name	The type name of my portlet after the change	
next_portlet_name	Portlet name after the change	
pid	Portal ID	
plid	Portlet Layout ID	
portlet_layout_name	My Portlet's name	
portlet_name	Portlet	

Properties	Meaning	Remarks
ppid	Portlet ID	
prev_portlet_layout_name	The type name of my portlet before the change	
prev_portlet_name	The name of the pre-change portlet	

My Portal Expiration Date

Action	Level	Log
Change security model	Important	[modify] my_portal_access (security_model:'**')
Add Expiration date	Important	[create] my_portal_access (uid/gid/rid/dynamic_role:**)
Delete Expiration date	Important	[delete] my_portal_access (uid/gid/rid/dynamic_role:**)

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	One of the following values is displayed: • Everyone • LoginUser
gid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant
uid	User ID	

Operational Administrative Privileges for Portals

Action	Level	log
Adding operational administrative privileges for portals	Information	[create] portal_privilege (pid:**, uid/gid/rid/dynamic_role:**, portal_name:'**')
Deleting operational administrative privileges for portals	Information	[delete] portal_privilege (pid:**, uid/gid/rid/dynamic_role:**, portal_name:'**')

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	One of the following values is displayed: • Everyone • LoginUser
gid	Organization ID	
pid	Portal ID	
portal_name	Portal Name	
rid	Role ID	
uid	User ID	

Portlet Groups

Action	Level	log
Adding Portlet Groups	Information	[create] portlet_group (pgid:**, portlet_group_name:'**')
Changing the Portlet Group	Information	[modify] portlet_group (pgid:**, portlet_group_name:'**')
Deleting a portlet Group	Information	[delete] portlet_group (pgid:**, portlet_group_name:'**')
Add display name	Information	[create] portlet_group_local (pgid:**, language_code:'**', portlet_group_name:'**')
Changed the added display name	Information	[modify] portlet_group_local (pgid:**, language_code:'**', prev_portlet_group_name:'**', next_portlet_group_name:'**')

Action	Level	log
Deleting added display names	Information	[delete] portlet_group_local (pgid:**,language_code:'**', portlet_group_name:'**')

Properties	Meaning	Remarks
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
next_portlet_group_name	Portlet group name after the change	
pgid	Parent Organization ID	
portlet_group_name	Portlet Group Name	
prev_portlet_group_name	The name of the pre-change portlet group	

HTML Portlets

Action	Level	log
Adding HTML Portlets	Important	[create] html_portlet (ppid:**, portlet_name:'**')
Changing the HTML portlet	Important	[modify] html_portlet (ppid:**, portlet_name:'**')
Deleting an HTML portlet	Important	[delete] html_portlet (ppid:**, portlet_name:'**')
Add display name	Important	[create] html_portlet_local (ppid:**, language_code:'**', portlet_name:'**')

Action	Level	log
Changed the added display name	Important	[modify] html_portlet_local (ppid:**, language_code:'**', prev_portlet_name:'**', next_portlet_name:'**')
Deleting added display names	Important	[delete] html_portlet_local (ppid:**, language_code:'**', portlet_name:'**')

Properties	Meaning	Remarks
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
next_portlet_name	Portlet name after the change	
portlet_name	Portlet	
ppid	Portlet ID	
prev_portlet_name	The name of the pre-change portlet	

PHP Portlets

Action	Level	log
Adding PHP portlets	Important	[create] php_portlet (ppid:**, portlet_name:'**')
Changing PHP portlets	Important	[modify] php_portlet (ppid:**, portlet_name:'**')
Deleting PHP portlets	Important	[delete] php_portlet (ppid:**, portlet_name:'**')
Add display name	Important	[create] php_portlet_local (ppid:**, language_code:'**', portlet_name:'**')

Action	Level	log
Changed the added display name	Important	[modify] php_portlet_local (ppid:**, language_code:'**', prev_portlet_name:'**', next_portlet_name:'**')
Deleting added display names	Important	[delete] php_portlet_local (ppid:**, language_code:'**', portlet_name:'**')

Properties	Meaning	Remarks
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
next_portlet_name	Portlet name after the change	
portlet_name	Portlet	
ppid	Portlet ID	
prev_portlet_name	The name of the pre-change portlet	

Operational Administrative Privileges for Portlet Groups

Action	Level	Log
Adding operational administrative privileges	Important	[create] portlet_group_privilege (pgid:**, uid/gid/rid/dynamic_role:**, portlet_group_name:'**')
Delete Operational Administrative Privileges	Important	[delete] portlet_group_privilege (pgid:**, uid/gid/rid/dynamic_role:**, portlet_group_name:'**')

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	One of the following values is displayed: • Everyone • LoginUser
gid	Organization ID	
pgid	Parent Organization ID	
portlet_group_name	Portlet Group Name	
rid	Role ID	
uid	User ID	

Importing from Files

Action	Level	log
Import HTML portlets	Important	[import] html_portlet (ppid:**, portlet_name:'**')
Import (append) the name of the HTML portlet.	Important	[import] html_portlet_local (ppid:**, language_code:'**', portlet_name:'**')
Importing (changing) the name of the HTML portlet	Important	[import] html_portlet_local (ppid:**, language_code:'**', prev_portlet_name:'**', next_portlet_name:'**')
Import (delete) the name of the HTML portlet	Important	[import_delete] html_portlet_local (ppid:**, language_code:'**', portlet_name:'**')
Importing PHP portlets	Important	[import] php_portlet (ppid:**, portlet_name:'**')
Import PHP portlet name (added)	Important	[import] php_portlet_local (ppid:**,language_code:'**', portlet_name:'**')
Import PHP portlet name (changed)	Important	[import] php_portlet_local (ppid:**,language_code:'**', prev_portlet_name:'**',next_portlet_name:'**')

Action	Level	log
Import PHP portlet name (delete)	Important	[import_delete] php_portlet_local (ppid:**,language_code:'**', portlet_name:'**')

Properties	Meaning	Remarks
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
next_portlet_name	Portlet name after the change	
portlet_name	Portlet	
ppid	Portlet ID	
prev_portlet_name	The name of the pre-change portlet	

Exporting to Files

Action	Level	log
Export HTML portlets	Important	[export] html_portlet (ppid:**, portlet_name:'**')
Export HTML portlet Name	Important	[export] html_portlet_local (ppid:**, languageCode:'**', portlet_name:'**')
Export PHP portlets	Important	[export] php_portlet (ppid:**, portlet_name:'**')
Export PHP portlet Name	Important	[export] php_portlet_local (ppid:**,languageCode:'**', portlet_name:'**')

Properties	Meaning	Remarks
languageCode	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
portlet_name	Portlet	
ppid	Portlet ID	

JavaScript and CSS Customization

Action	Level	log
Portlet Customization	Important	[modify] customization (ppid:**, apply_status:'**' …, js_1:'**', css_1;'**'…)

Properties	Meaning	Remarks
apply_status	JavaScript and CSS customization	
Integers starting with Css_	Files and links to be applied in CSS customization	
Integers starting with Js_	Files and links to be applied in CSS customization	
ppid	Portlet ID	

Personal Settings

My Portal list

Action	Level	log
Adding Portals	Important	[create] my_portal (pid:**, portal_name:'**')
Changing the display name of a portal	Important	[modify] my_portal (pid:**, prev_portal_name:'**', next_portal_name:'**')
Deleting Portals	Important	[delete] my_portal (pid:**, portal_name:'**')
Adding a Portlet	Important	[create] my_portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**', layout:'**')
Change portlet display name	Important	[modify] my_portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', prev_portlet_name:'**', next_portlet_name:'**')
Select design of "Notifications" portlet	Important	[personal_portlet_config] whatsnew_portlet_set (plid:**, display_items:'abstract/sender_name/timestamp', display_style:'**', grn.space:'index/5/order=0', grn.schedule:'index/5/order=1', grn.message:'index/5/order=2', grn.bulletin:'index/5/order=3', grn.cabinet:'index/5/order=4', grn.phonemessage:'index/5/order=5', grn.mail:'index/5/order=6', grn.workflow:'index/5/order=7', grn.report:'index/5/order=8', x.1:'index/5/order=9')
Move a Portlet	Important	[move] my_portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**', layout:'**')
Reorder portlets	Important	[order] my_portal_portlet
Deleting portlets	Important	[delete] my_portal_portlet (pid:**, plid:**, ppid:**, portal_name:'**', portlet_name:'**')

Properties	Meaning	Remarks
display_style	Design of "Notifications" portlet	One of the following values is displayed: • Old (line view)

Properties	Meaning	Remarks
		• New (multiple lines)
layout	Layout	Displays one of the following values: • top • left • center • right
next_portal_name	My Portal name after the change	
pid	Portal ID	
plid	Portlet Layout ID	
portal_name	My Portal Name	
portlet_name	Portlet	
ppid	Portlet ID	
prev_portal_name	My Portal Name	

My Portal Display Order

Action	Level	log
Changing the order of my portals	Important	[order] my_portal

My Portlet Groups

Action	Level	log
Adding a My portlet group	Important	[create] my_portlet_group (pgid:**, portlet_group_name:'**')
Changing the My Portlet group	Important	[modify] my_portlet_group (pgid:**, portlet_group_name:'**')

Action	Level	log
Deleting my portlet groups	Important	[delete] my_portlet_group (pgid:**, portlet_group_name:'**')

Properties	Meaning	Remarks
pgid	Parent Organization ID	
portlet_group_name	My portlet group name	

HTML Portlets

Action	Level	log
Adding HTML Portlets	Important	[create] my_html_portlet (ppid:**, portlet_name:'**')
Changing the HTML portlet	Important	[modify] my_html_portlet (ppid:**, portlet_name:'**')
Deleting an HTML portlet	Important	[delete] my_html_portlet (ppid:**, portlet_name:'**')
Import HTML portlets	Important	[import] my_html_portlet (ppid:**, portlet_name:'**')
Export HTML portlets	Important	[export] my_html_portlet (ppid:**, portlet_name:'**')

Properties	Meaning	Remarks
pid	Portal ID	
portlet_name	Portlet	
ppid	Portlet ID	

1.10.7. Logs for Spaces

System Administration

General Settings

Action	Level	log
• Default visibility • Expiration date setting • Default value for expiration date	Important	[config] common (privacy_default:'**', allow_unlimited:'**', default_expiration_date:**)

Properties	Meaning	Remarks
allow_unlimited	Unlimited setting for expiration date	One of the following values is displayed: • allow • disallow
default_expiration_date	Default value for expiration date	One of the following values is displayed: • unlimited • 1 - 10000
privacy_default	Default visibility of Space	One of the following values is displayed: • private • public

Setting Categories

Action	Level	Log
Adding Categories	General	[create] category (cid:**, foreign_key:'**', category_name:'**', parent:**, parent_name:'**')
Change categories	General	[modify] category (cid:**, foreign_key:'**', category_name:'**', parent:**, parent_name:'**')

Action	Level	Log
Move categories	General	[move] category (cid:**, category_name:'**', src_cid:**, parent:**, parent_name:'**')
Delete categories	General	[delete] category (cid:**, category_name:'**')
Add display names of categories	General	[create] category_local (cid:**, category_name:'**', language_code:'**')
Change display names of categories	General	[modify] category_local (cid:**, category_name:'**', prev_category_name:'**', language_code:'**')
Delete display names of categories	General	[delete] category_local (cid:**, category_name:'**', language_code:'**')
Moving spaces	General	[move] space (spid:**, space_name:'**', cid:**, category_name:'**', src_cid:**, src_category_name:'**')

Properties	Meaning	Remarks
category_name	Category names	
cid	Category ID	
foreign_key	Category Code	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
parent	Parent category ID	
parent_name	Parent category names	

Properties	Meaning	Remarks
prev_category_name	Original category names	
src_category_name	Source category names	
src_cid	Source category ID	

Import from CSV File

Action	Level	log
Import categories	Important	[import] category (cid:**, category_name:'**', foreign_key:'**', operation:'**')
Add category names by importing them	Important	[import] category_local (cid:**, category_name:'**', language_code:'**')
Change category names by importing them	Important	[import] category_local (cid:**, category_name:'**', language_code:'**', prev_category_name:'**')
Delete category names by importing them	Important	[import_delete] category_local (cid:**, category_name:'**', language_code:'**')

Properties	Meaning	Remarks
category_name	Category names	
cid	Category ID	
foreign_key	Category Code	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese)

Properties	Meaning	Remarks
		• zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
prev_category_name	Original category names	

Export to CSV File

Action	Level	log
Export categories	Important	[export] category (cid:**, category_name:'**', foreign_key:'**')
Export category names	Important	[export] category_local (cid:**, category_name:'**', language_code:'**')

Properties	Meaning	Remarks
cid	Category ID	
foreign_key	Category Code	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.

User Actions

Space

Action	Level	log
Add	General	[create] space (spid:**, space_name:'**', category_name:'**', privacy:'**', icon:'**', join_leave:**, end_timestamp:**, member_name_1:'**', member_name_2:'**', ..., admin_name_1:'**', admin_name_2:'**', ...)
Change	General	[modify] space (space_name:'**', category_name:'**', privacy:'**', icon:'**', join_leave:**, end_timestamp:**, member_name_1:'**', member_name_2:'**', ..., admin_name_1:'**', admin_name_2:'**', ...)
Delete	General	[delete] space (spid:**, space_name:'**')
Add display name	General	[create] space_local (spid:**, space_name:'**', language_code:'**')
Change display name	General	[modify] space_local (spid:**, space_name:'**', prev_space_name:'**', language_code:'**')
Delete display name	General	[delete] space_local (spid:**, space_name:'**', language_code:'**')

Properties	Meaning	Remarks
admin_name	Space administrator user name	
category_name	Category names	
cid	Category ID	
end_timestamp	Expiration date and time for Space	
icon	Icon name	
join_leave	Join and leave permissions	One of the following values is displayed: • 0 (Do not allow members to join and leave the space)

Properties	Meaning	Remarks
		• 1 (Allow members to join and leave the space)
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
member_name	Member name	
prev_space_name	Original space name	
privacy	Visibility	One of the following values is displayed: • public • private
space_name	Space	
spid	Space ID	

Folder

Action	Level	log
• Add • Change • Delete	General	[modify] folder(spid:**, space_name:'**', did:**, folder_name:'**')

Properties	Meaning	Remarks
did	Folder ID	
folder_name	Folder names	

Properties	Meaning	Remarks
space_name	Space	
spid	Space ID	

Discussions

Action	Level	log
Add	General	[create] thread (spid:**, space_name:'**', tid:**, thread_name:'**', did:**, folder_name:'**')
Change	General	[modify] thread (spid:**, space_name:'**', tid:**, thread_name:'**', did:**, folder_name:'**', notify_check:'**')
Move a discussion in same space	General	[move] thread (spid:**, space_name:'**', tid:**, thread_name:'**', src_did:**, src_folder_name:'**', dst_did:**, dst_folder_name:'**', notify_check:'**')
Move a discussion to another space	General	[move] thread (src_spid:**, src_space_name:'**', tid:**, thread_name:'**', src_did:**, src_folder_name:'**', dst_spid:**, dst_space_name:'**', dst_did:**, dst_folder_name:'**', notify_check:'**')
Delete	General	[delete] thread (spid:**, space_name:'**', tid:**, thread_name:'**')
View	General	[browse] thread (cid:**, spid:**, space_name:'**'[, did:**], tid:**, thread_name:'**')
Attachment	General	[create] thread_file (spid:**, space_name:'**', tid:**, thread_name:'**', fid:**, file_name:'**')
Deleting Files	General	[delete] thread_file (spid:**, space_name:'**', tid:**, thread_name:'**', fid:**, file_name:'**')
Post comments	General	[create] thread_follow (spid:**, space_name:'**', tid:**, thread_name:'**', follow_id:**)

Action	Level	log
Deleting comments	General	[delete] thread_follow (spid:**, space_name:'**', tid:**, thread_name:'**', follow_id:**)
Attaching files in comments	General	[create] thread_file (spid:**, space_name:'**', tid:**, thread_name:'**', follow_id:**, fid:**, file_name:'**')
Deleting files in comments	General	[delete] thread_file (spid:**, space_name:'**', tid:**, thread_name:'**', follow_id:**, fid:**, file_name:'**')

Properties	Meaning	Remarks
category_name	Category names	
cid	Category ID	
did	Folder ID	
dst_did	Destination folder ID	
dst_folder_name	Destination folder name	
fid	File ID	
file_name	File name	
folder_name	Folder names	
follow_id	Comment ID	
notify_check	Update notifications	One of the following values is displayed: • ON (Notify of the update) • OFF (Do not notify of the update)
space_name	Space	
spid	Space ID	

Properties	Meaning	Remarks
src_did	Source folder ID	
src_folder_name	Source folder name	
thread_name	Title of the discussion	
tid	Discussion ID	

Shared To-Do

Action	Level	log
Add	General	[create] shared_todo (spid:**, space_name:'**', stid:**, shared_todo_name:'**', assign_1:'**', assign_2:'**', ...)
Change	General	[modify] shared_todo (spid:**, space_name:'**', stid:**, shared_todo_name:'**', assign_1:'**', assign_2:'**', assignees_status_initialize:**, ...)
Delete	General	[delete] shared_todo (spid:**, space_name:'**', stid:**, shared_todo_name:'**')
Attachment	General	[create] shared_todo_file (spid:**, space_name:'**', stid:**, shared_todo_name:'**', fid:**, file_name:'**')
Deleting Files	General	[delete] shared_todo_file (spid:**, space_name:'**', stid:**, shared_todo_name:'**', fid:**, file_name:'**')
Post comments	General	[create] shared_todo_follow (spid:**, space_name:'**', stid:**, shared_todo_name:'**', follow_id:**)
Deleting comments	General	[delete] shared_todo_follow (spid:**, space_name:'**', stid:**, shared_todo_name:'**', follow_id:**)
Attaching files in comments	General	[create] shared_todo_file (stid:**, shared_todo_name:'**', follow_id:**, fid:**, file_name:'**')

Action	Level	log
Deleting files in comments	General	[delete] shared_todo_file (spid:**, space_name:'**', stid:**, shared_todo_name:'**', follow_id:**, fid:**, file_name:'**')

Properties	Meaning	Remarks
assign_[integer starting from 1]	Assignee name	
assignees_status_initialize	Selection status of "Reset to Uncompleted"	One of the following values is displayed: • 0 (Do not reset to Uncompleted) • 1 (Reset to Uncompleted)
fid	File ID	
file_name	File name	
follow_id	Comment ID	
shared_todo_name	Shared To-Do name	
space_name	Space	
spid	Space ID	
stid	Shared To-Do ID	

1.10.8. Logs of Bookmarks

Shared Bookmarks

General Settings

Action	Level	log
Changing general settings	Important	[config] system_general (popup_set:'**')

Properties	Meaning	Remarks
popup_set	Links open in the new window	One of the following values is displayed: • title/url • icon

Shared Bookmarks

Action	Level	Log
Adding Categories	Important	[create] system_category (cid:**, pcid:**, category_name:'**', parent_category_name:'**', category_foreign_key:'**', category_memo:'**')
Change categories	Important	[modify] system_category (cid:**, pcid:**, category_name:'**', parent_category_name:'**', category_foreign_key:'**', category_memo:'**')
Move categories	Important	[move] system_category (cid:**, pcid:**, category_name:'**', prev_parent_category_name:'**', next_parent_category_name:'**')
Reorder Categories	Important	[order] system_category (cid:**, category_name:'**')
Delete categories	Important	[delete] system_category (cid:**, category_name:'**')
Add display names of categories	Important	[create] system_category_local (cid:**, language_code:'**', category_name:'**')
Changing display names added to categories	Important	[modify] system_category_local (cid:**, language_code:'**', prev_category_name:'**', next_category_name:'**')

Action	Level	Log
Deleting a display name that has been added to a category	Important	[delete] system_category_local (cid:**, language_code:'**', category_name:'**')
Add link	Important	[create] system_link (lid:**, cid:**, link_name:'**', category_name:'**', link_url:'**', link_memo:'**', sso_name:'**')
Adding a separator line	Important	[create] system_separator (lid:**, cid:**, category_name:'**')
Changing links	Important	[modify] system_link (lid:**, cid:**, link_name:'**', category_name:'**', link_url:'**', link_memo:'**', sso_name:'**')
Moving links	Important	[move] system_link (lid:**, cid:**, link_name:'**', prev_category_name:'**', next_category_name:'**')
Reorder Links	Important	[order] system_link (cid:**, category_name:'**')
Deleting links	Important	[delete] system_link (lid:**, cid:**, link_name:'**', category_name:'**')
Import links from a CSV file	Important	[import] system_link (lid:**, cid:**, link_name:'**', category_name:'**')
Export links to CSV	Important	[export] system_link (lid:**, cid:**, link_name:'**', category_name:'**')

Properties	Meaning	Remarks
category_foreign_key	Category key	
category_memo	Category notes	
category_name	Category names	
cid	Category ID	
language_code	Language code	Displays one of the following values: • ja (Japanese)

Properties	Meaning	Remarks
		• en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
lid	Link ID	
link_memo	Notes on links	
link_name	Link name	
link_url	Target link URL	
next_category_name	Category name after the change	
next_parent_category_name	Parent category name After moving	
parent_category_name	Parent category names	
pcid	Parent category ID	
prev_category_name	Original category names	
prev_parent_category_name	Parent category name before moving	
sso_name	Single Sign-on setting name	

User Rights Settings

Action	Level	Log
Change security model	Important	[modify] system_category_access (cid:**, category_name:'**', security_model:'**')
Add new entry	Important	[create] system_category_access (cid:**, uid/gid/rid:**, category_name:'**')
Delete User Rights	Important	[delete] system_category_access (cid:**, uid/gid/rid:**, category_name:'**')

Properties	Meaning	Remarks
category_name	Category names	
cid	Category ID	
gid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant
uid	User ID	

Operational Administrators Settings

Action	Level	Log
Adding operational administrative privileges	Important	[create] system_category_privilege (cid:**, uid/gid/rid:**, category_name:'**')
Delete Operational Administrative Privileges	Important	[delete] system_category_privilege (cid:**, uid/gid/rid:**, category_name:'**')

Properties	Meaning	Remarks
category_name	Category names	
cid	Category ID	
gid	Organization ID	
rid	Role ID	
uid	User ID	

Importing User Rights

Action	Level	log
Importing User Rights	Important	[import] system_category_access (cid:**, uid/gid/rid:**, category_name:'**', auth:'**')
Import security Model	Important	[import] system_category_access (cid:**, category_name:'**', security_model:'**')

Properties	Meaning	Remarks
auth	Permissions	One of the following values is displayed: • browse:1 • browse:0
category_name	Category names	
cid	Category ID	
gid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant

Properties	Meaning	Remarks
uid	User ID	

Exporting User Rights

Action	Level	log
Exporting User Rights	Important	[export] system_category_access (cid:**, uid/gid/rid:**, category_name:'**', auth:'**')
Export security Model	Important	[export] system_category_access (cid:**, category_name:'**', security_model:'**')

Properties	Meaning	Remarks
auth	Permissions	One of the following values is displayed: • browse:1 • browse:0
category_name	Category names	
cid	Category ID	
gid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant
uid	User ID	

Personal Bookmarks

General Settings

Action	Level	log
Changing general settings	Important	[config] personal_general (popup_set:'**')

Properties	Meaning	Remarks
popup_set	Links open in the new window	One of the following values is displayed: • title/url • icon

User Actions

Action	Level	Log
Adding Categories	Important	[create] personal_category (cid:**, pcid:**, category_name:'**', parent_category_name:'**', category_foreign_key:'**', category_memo:'**')
Change categories	Important	[modify] personal_category (cid:**, pcid:**, category_name:'**', parent_category_name:'**', category_foreign_key:'**', category_memo:'**')
Move categories	Important	[move] personal_category (cid:**, pcid:**, category_name:'**', prev_parent_category_name:'**', next_parent_category_name:'**')
Reorder Categories	Important	[order] personal_category (cid:**, category_name:'**')
Delete categories	Important	[delete] personal_category (cid:**, category_name:'**')
Add link	Important	[create] personal_link (lid:**, cid:**, link_name:'**', category_name:'**', link_url:'**', link_memo:'**')
Adding a separator line	Important	[create] personal_separator (lid:**, cid:**, category_name:'**')
Changing links	Important	[modify] personal_link (lid:**, cid:**, link_name:'**', category_name:'**', link_url:'**', link_memo:'**')

Action	Level	Log
Moving links	Important	[move] personal_link (lid:**, cid:**, link_name:'**', prev_category_name:'**', next_category_name:'**')
Reorder Links	Important	[order] personal_link (cid:**, category_name:'**')
Deleting links	Important	[delete] personal_link (lid:**, cid:**, link_name:'**', category_name:'**')

Properties	Meaning	Remarks
category_foreign_key	Category key	
category_memo	Category notes	
category_name	Category names	
cid	Category ID	
lid	Link ID	
link_memo	Notes on links	
link_name	Link name	
link_url	Target link URL	
next_category_name	Category name after the change	
next_parent_category_name	Parent category name After moving	
parent_category_name	Parent category names	
pcid	Parent category ID	
prev_category_name	Original category names	

Properties	Meaning	Remarks
prev_parent_category_name	Parent category name before moving	

1.10.9. Scheduler Log

This section describes the scheduler.

References

- Logs of General Settings for Scheduler(385Page)
- Logs of Setting up Appointment Types(388Page)
- Logs of Appointment Types Links(388Page)
- Logs of Facilities/Facility Groups(389Page)
- Logs of Facility Reservation Settings(391Page)
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- Logs of User Operations on Scheduler(410Page)

1.10.9.1. Logs of General Settings for Scheduler

Action	Level	log
Unit of time to make appointments (reservations)	Important	[config] common (second_unit:**)
Repeating appointment periods	Important	[config] common (repeat_limit:**)
Allow private appointments Default private Appointments	Important	[config] common (use_private:'**', visibility_default:'**')
Visibility of private appointments	Important	[config] common (hidden_private:'**')
Specifying organizations/roles for the "Shared with" users	Important	[config] common (allow_setting_group_role_to_watchers:'**')
Notifications to the "Shared with" users	Important	[config] common (managed_notify:'**')
Visibility of shared appointments[1]	Important	[config] common (show_shared_appointment:'**')
Visibility of appointment of organizations	Important	[config] common (use_oganize:'**')
Visibility of holidays	Important	[config] common (show_holiday:'**')
View all facilities	Important	[config] common (show_all_facility:'**')
Visibility of facility names	Important	[config] common (show_facility_name:'**', position_facility_name_at:'**')
Attaching Files	Important	[config] common (allow_file_attachment:'**')
Attendance	Important	[config] common (allow_attendance_check:'**', default_value_attendance_check:'**')

Properties	Meaning	Remarks
allow_attendance_check	Attendance	One of the following values is displayed:

Properties	Meaning	Remarks
		• ON • OFF
allow_file_attachment	Allow file attachment	One of the following values is displayed: • ON • OFF
allow_setting_group_role_to_watchers	Specify organizations/roles for the "Shared with" users	One of the following values is displayed: • ON • OFF
default_value_attendance_check	Default value for allowing the response request feature	One of the following values is displayed: • ON • OFF
hidden_private	Visibility of private appointments	One of the following values is displayed: • ON • OFF
managed_notify	Notifications to the "Shared with" users	One of the following values is displayed: • ON • OFF
position_facility_name_at	Facility Name Placement	One of the following values is displayed: • BEFORE • AFTER
repeat_limit	Repeating appointment periods	
second_unit	Unit of time to make appointments (reservations)	

Properties	Meaning	Remarks
show_facility_name	Visibility of facility names	One of the following values is displayed: • ON • OFF
show_holiday	Visibility of holidays	One of the following values is displayed: • ON • OFF
show_shared_appointment[1]	Visibility of shared appointments	One of the following values is displayed: • ON • OFF
use_oganize	Visibility of appointment of organizations	One of the following values is displayed: • ON • OFF
use_private	Allow private appointments	One of the following values is displayed: • ON (can be added) • OFF (cannot be added)
visibility_default	Default private Appointments	One of the following values is displayed: • Public • Private private • OFF

[1]: Displayed in Garoon version 5.9.0 or later.

1.10.9.2. Logs of Setting up Appointment Types

Action	Level	log
Setting up a menu	Important	[config] system_menu

1.10.9.3. Logs of Appointment Types Links

Action	Level	log
Creating a menu Connection	Important	[create] menupage (mid:**, menu_title:'**')
Changing the menu connection	Important	[modify] menupage (mid:**, menu_title:'**')
• Deleting a menu connection • Delete all menus	Important	[delete] menupage (mid:**, menu_title:'**')
Reorder Menus	Important	[order] menupage

Properties	Meaning	Remarks
menu_title	Name of menu	One of the following values is displayed: • ON • OFF
mid	Menu ID	

1.10.9.4. Logs of Facilities/Facility Groups

Action	Level	log
Facility Registration	Important	[create] facility (faid:**, facility_name:'**')
Facility changes	Important	[modify] facility (faid:**, facility_name:'**')
Deleting a facility	Important	[delete] facility (faid:**, facility_name:'**')
Reorder Facilities	Important	[order] facility
Adding a display name for a facility	Important	[create] facility_local (faid:'**', language_code:'**', facility_name:'**')
Changing the display name of a facility	Important	[modify] facility_local (faid:'**', language_code:'**', prev_facility_name:'**', next_facility_name:'**')
Deleting a facility display name	Important	[delete] facility_local (faid:'**', language_code:'**', facility_name:'**')
Adding a facility Group	Important	[create] facilitygroup (fgid:**, facilitygroup:'**')
Changing facility Groups	Important	[modify] facilitygroup (fgid:**, facilitygroup:'**')
Deleting a facility Group	Important	[delete] facilitygroup (fgid:**, facilitygroup:'**')
Reorder Facility Groups	Important	[order] facilitygroup [modify] facilitygroup (fgid:**, facilitygroup:'**')
Adding a display name for a facility group	Important	[create] facilitygroup_local (fgid:'**', language_code:'**', facilitygroup_name:'**')
Changing the display name of a facility group	Important	[modify] facilitygroup_local (fgid:'**', language_code:'**', prev_facilitygroup_name:'**', next_facilitygroup_name:'**')
Add operational administrative privileges	Important	[create] privilege (fgid:**, uid/oid/rid/dynamic_role:**, facilitygroup:'**')

Action	Level	log
Delete Operational Administrative Privileges	Important	[delete] privilege (fgid:**, uid/oid/rid/dynamic_role:**, facilitygroup:'**')
Delete all operational administrative privileges	Important	[delete_all] privilege (fgid:**, facilitygroup:'**')

Properties	Meaning	Remarks
aid	Facility ID	
facility_name	Facility Name	
facilitygroup	Facility Group Name	
facilitygroup_name	The display name of the facility group	
fgid	Facility Group ID	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
next_facility_name	Facility Display name after the change	
next_facilitygroup_name	Facility group display name after the change	

Properties	Meaning	Remarks
prev_facility_name	Facility Display name before the change	
prev_facilitygroup_name	Facility group display name before the change	

1.10.9.5. Logs of Facility Reservation Settings

Facility Reservation Settings

Action	Level	log
Setting inheritance	Important	[config] facility_group (inheritance_from_parent:'**') [config] facility_facility (inheritance_from_parent:'**')
Period for which the reservation can be set	Important	[config] facility_group (reserve_limit:**) [config] facility_facility (reserve_limit:**)
Maximum time that the reservation can be set.	Important	[config] facility_group (reserve_limit_time:'**') [config] facility_facility (reserve_limit_time:'**')
Who can change the reservation?	Important	[config] facility_group (modify_user:'**') [config] facility_facility (modify_user:'**')
Notes in the list	Important	[config] facility_group (show_facility_memo:'**') [config] facility_facility (show_facility_memo:'**')
Repeating due Date	Important	[config] facility_group (use_facility_repeat:'**') [config] facility_facility (use_facility_repeat:'**')

Action	Level	log
Facility usage request	Important	[config] facility_group (facility_approval:'**') [config] facility_facility (facility_approval:'**')

Properties	Meaning	Remarks
facility_approval	Facility usage request	
inheritance_from_parent	Propagate the contents of parent facility groups	One of the following values is displayed: • ON • OFF
modify_user	Users who can change appointments	Users who can change appointments are displayed with the following values • creator • member • grantuser
reserve_limit	Reservation Period	One of the following values is displayed: • No (indefinitely) • 1 - 999
reserve_limit_time	Maximum hours allowed	Displays one of the following values: • NO • 30 • 60 • 90 • 120 • 150 • 180 • 210 • 240 • 270 • 300

Properties	Meaning	Remarks
show_facility_memo	Show notes in appointment lists	One of the following values is displayed: • ON • OFF
use_facility_repeat	Repeating appointments for facility reservation	One of the following values is displayed: • ON • OFF

Updating All Facility Settings

Action	Level	Log
Period for which the reservation can be set	Important	[config] facility_common (reserve_limit:**)
Maximum time that the reservation can be set.	Important	[config] facility_common (reserve_limit_time:'**')
Who can change the reservation?	Important	[config] facility_common (modify_user:'**')
Notes in the list	Important	[config] facility_common (show_facility_memo:'**')
Due Date	Important	[config] facility_common (use_facility_repeat:'**')
Facility usage request	Important	[config] facility_common (facility_approval:'**')

Properties	Meaning	Remarks
facility_approval	Facility usage request	
modify_user	Users who can change appointments	Users who can change appointments are displayed with the following values • creator • member • grantuser

Properties	Meaning	Remarks
reserve_limit	Reservation Period	One of the following values is displayed: • No (indefinitely) • 1 - 999
reserve_limit_time	Maximum hours allowed	Displays one of the following values: • NO • 30 • 60 • 90 • 120 • 150 • 180 • 210 • 240 • 270 • 300
show_facility_memo	Show notes in appointment lists	One of the following values is displayed: • ON • OFF
use_facility_repeat	Repeating appointments for facility reservation	One of the following values is displayed: • ON • OFF

1.10.9.6. Logs of Items for Facility Reservation Information

Action	Level	log
Changing built-in fields	Important	[config] facility_item (biid:'**', display:**)
Adding a customization item	Important	[create] facility_item (eiid:**, display_name:'**', id:'**', type:'**', use:**, display:**, display_item_name:**)
Changing custom items	Important	[modify] facility_item (eiid:**, display_name:'**', id:'**', type:'**', use:**, display:**, display_item_name:**)
Reorder Customization Items	Important	[order] facility_item (eiid:**, list_index:**)
Delete customization Items	Important	[delete] facility_item (eiid:**)

Properties	Meaning	Remarks
biid	Built-in item ID	One of the following values is displayed: • title_purpose • title_name
display_item_name	Show items in the list	One of the following values is displayed: • 0 • 1
display_name	Output user name/ organization name	
eiid	Custom Item ID	One of the following values is displayed: • title_purpose • title_name

Properties	Meaning	Remarks
list_index	Descending number approx.	

1.10.9.7. Logs of Permission Settings for Scheduler

Operational Administrative Privileges

Action	Level	Log
Adding operational administrative privileges	Important	[create] privilege (fgid:**, uid/oid/rid/dynamic_role:**, facilitygroup:'**')
Delete Operational Administrative Privileges	Important	[delete] privilege (fgid:**, uid/oid/rid/dynamic_role:**, facilitygroup:'**')
Delete all operational administrative privileges	Important	[delete_all] privilege (fgid:**, facilitygroup:'**')

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	The target is displayed as follows • Everyone • LoginUser • Administratorse
facilitygroup	Facility Group Name	
fgid	Facility Group ID	
oid	Organization ID	

Properties	Meaning	Remarks
rid	Role ID	
uid	User ID	

User Rights

Action	Level	Log
Change security model	Important	[modify] access (uid/oid/rid/fid/fgid:**, security_model:'**')
Add new entry	Important	[create] access (uid/oid/rid/fid/fgid:**, uid/oid/rid:**, security_model:'**', auth:'**')
Changing permissions	Important	[modify] access (uid/oid/rid/fid/fgid:**, uid/oid/rid:**, security_model:'**', auth:'**')
Delete User Rights	Important	[delete] access (uid/oid/rid/fid/fgid:**, uid/oid/rid:**)
Delete all permissions	Important	[delete_all] access (uid/oid/rid/fid/fgid:**)

Properties	Meaning	Remarks
auth	Permissions	One of the following values is displayed: • read • add • modify • delete
fgid	Facility Group ID	
fid	Facility ID	
oid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed • revoke

Properties	Meaning	Remarks
		• grant

1.10.9.8. Logs of Default Shared with Users

Action	Level	log
Add default watchers	Important	[create] default_public_destination (target_uid: '**', ...)
Reorder default watchers	Important	[order] default_public_destination (target_uid: '**', ...)
Delete default values	Important	[delete] default_public_destination (target_uid:'**', ...)
Delete default watchers	Important	[delete_all] default_public_destination (target_uid: '**', target:'**')

Properties	Meaning	Remarks
target	Type	One of the following values is displayed: • user • group • role
target_uid	Target specified as "Shared with" users	

1.10.9.9. Logs of Deleting All Schedules

Action	Level	log
Delete all	Important	[delete_all] system_event (delete_date:'**')

Properties	Meaning	Remarks
delete_date	Start date of the deletion	

1.10.9.10. Logs of Importing Scheduler Data from CSV Files

Action	Level	log
Import an appointment	Important	[import] system_event
Import facility Information	Important	[imporot] facility
Import facility Information (added)	Important	[create] facility (faid:**, facility_name:**)
Import facility information (changed)	Important	[modify] facility (faid:**, facility_name:**)
Import facility Information (delete)	Important	[create] facilitygroup (fgid:**, facilitygroup:**)
Import facility Name (added)	Important	[import] facility_local (faid:'**', language_code:'**', facility_name:'**')
Import facility name (changed)	Important	[import] facility_local (faid:'**', language_code:'**', prev_facility_name:'**', next_facility_name:'**')
Import Facility Name (delete)	Important	[import_delete] facility_local(faid:'**', language_code:'**', facility_name:'**')

Action	Level	log
Import Facility Group Information	Important	[import] facility_group
Import Facility Group name (added)	Important	[import] facilitygroup_local (fgid:'**', language_code:'**', facilitygroup_name:'**')
Import Facility Group name (edit)	Important	[import] facilitygroup_local (fgid:'**', language_code:'**', prev_facilitygroup_name:'**', next_facilitygroup_name:'**')
Import Facility Group name (delete)	Important	[import_delete] facilitygroup_local (fgid:'**', language_code:'**', facilitygroup_name:'**')
Import operational administrative privileges	Important	[create] privilege (fgid:**, uid/oid/rid/dynamic_role:**, facilitygroup:'**') [import] privilege
Importing User Rights	Important	[import] access [modify] access (uid/oid/rid/fid:**, security_model:'**') [modify] access (uid/oid/rid/fid:**, uid/oid/rid:**, security_model:'**', auth:'**')
Import default "Shared with" users	Important	[import] default_public_destination

Properties	Meaning	Remarks
auth	Permissions	One of the following values is displayed: • read • add • modify • delete
facility_name	Facility Name	
facilitygroup	Facility Group Name	
facilitygroup_name	The display name of the facility group	

Properties	Meaning	Remarks
faid	Facility ID	
fgid	Facility Group ID	
fid	Facility ID	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
next_facility_name	Facility Display name after the change	
next_facilitygroup_name	Facility group display name after the change	
oid	Organization ID	
prev_facility_name	Facility Display name before the change	
prev_facilitygroup_name	Facility group display name before the change	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant

Properties	Meaning	Remarks
uid	User ID	

1.10.9.11. Logs of Exporting Scheduler Data to CSV Files

Action	Level	log
Export an appointment	Important	[export] system_event (uid/oid/fid:**, display_name:'**')
Export facility Information	Important	[export] facility
Export facility Name	Important	[export] facility_local (faid:'**', languageCode:'**', facility_name:'**')
Export Facility Group Information	Important	[export] facilitygroup
Export Facility Group Name	Important	[export] facilitygroup_local (fgid:'**', languageCode:'**', facilitygroup_name:'**')
Export operational administrative privileges	Important	[export] privilege
Exporting User Rights	Important	[export] access
Export default "Shared with" users	Important	[export] default_public_destination

Properties	Meaning	Remarks
display_name	Output user name/ organization name	
facility_name	Facility Name	

Properties	Meaning	Remarks
facilitygroup_name	Facility Group Display Name	
faid	Facility ID	
fgid	Facility Group ID	
fid	Facility ID	
languageCode	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
oid	Organization ID	
uid	User ID	

1.10.9.12. Logs of Setting up V-CUBE Meeting

Action	Level	log
Setting up V-CUBE Meeting	Important	[config] netmeeting (available:'**', netmeething_version:**, invite_url_schedule_display:'**', invite_url_email_notification:'**', outside_member_input_rows:**, netmeeting_meeting_system_url:'**',

Action	Level	log
		netmeeting_login_id:'**', netmeeting_login_password:'**')

Properties	Meaning	Remarks
available	V-CUBE Meeting	One of the following values is displayed: • ON（利用する） • OFF (do not use)
invite_url_email_notification	E-mail notifications for invitation URLs	One of the following values is displayed: • ON（E-mail通知する） • OFF (do not send E-mail)
invite_url_schedule_display	Show Invitation URLs	One of the following values is displayed: • ON (to be displayed on the details screen) • OFF (does not appear on the details screen)
netmeeting_login_id	Login ID for V-CUBE Meeting	
netmeeting_login_password	Login password for V-CUBE Meeting	
netmeeting_meeting_system_url	V-CUBE Meeting URL	
netmeeting_version	V-CUBE Meeting version	One of the following values is displayed: • 5 (v Cube meeting 5) • 4 (V-CUBE Meeting 4)
outside_member_input_rows	Number of external invitee fields	

1.10.9.13. Scheduler JavaScript/CSS Customization Logs

Action	Level	Log
Add customization group	Important	[add] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Edit customization group	Important	[modify] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Delete customization group	Important	[delete] customization_group (id:*, name:'**', apply_status:'**', rid_1:*,oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)

Properties	Meaning	Remarks
apply_status	JavaScript and CSS customization	One of the following values is displayed: • applied (apply) • not applied (do not apply)
css_[integer starting from 1]	Files and links to be applied in CSS customization	
id	Customization group ID	
js_[integer starting from 1]	Files and links to be applied in the JavaScript customization	
name	Customization group name	
oid	Organization ID	

Properties	Meaning	Remarks
rid	Role ID	
uid	User ID	

1.10.9.14. Logs of Personal Settings for Scheduler

Display Settings

Action	Level	log
Setting the display time	Important	[config] display (view_hour:**)
The day of the week	Important	[config] display (start_wday:**)
Appointment ending time	Important	[config] display (show_endtime:**)

Properties	Meaning	Remarks
show_endtime	Appointment ending time	One of the following values is displayed: • ON • OFF
start_wday	The day of the week	One of the following values is displayed: • Sunday • Wednesday
view_hour	Time period	

Setting Appointment Types

Action	Level	log
Setting up Appointment Types	Important	[config] personal_menu

Forwarding E-mail Notifications for Appointments

Action	Level	log
Setting up e-mail forwarding of appointment notifications	Important	[config] forward_mail (forward:**, email:**)

Properties	Meaning	Remarks
email	E-mail address	
forward	E-mail forwarding	One of the following values is displayed: • ON • OFF

List of default "Shared with" users

Action	Level	log
Adding default "Shared with"	Important	[create] default_public_destination (target_uid:'**', uid:'**')
Reordering default "Shared with"	Important	[order] default_public_destination (target_uid:'**', uid:'**', uid:'**')
Deleting default "Shared with"	Important	[delete] default_public_destination (target_uid:'**', uid:'**')
Deleting default "Shared with" in bulk	Important	[delete_all] default_public_destination (target_uid:**, target:'user') [delete_all] default_public_destination (target_uid:**, target:'group') [delete_all] default_public_destination (target_uid:**, target:'role')

Properties	Meaning	Remarks
gid	Organization ID	
rid	Role ID	
target_uid	User ID of the user who has been manipulated	
uid	User ID	

Importing Schedules

Action	Level	Log
Import from CSV File	Important	[imporot] personal_event [create] event (eid:**, event_title:**)

Properties	Meaning	Remarks
eid	Event ID	
event_title	Appointment Title	

Exporting Schedules

Action	Level	Log
Export to CSV File	Important	[export] personal_event

Scheduler Statistics

Action	Level	log
Output statistics	Important	[export] statistics (uid/oid:**, display_name:**)

Properties	Meaning	Remarks
display_name	Output user name or organization name	
oid	Organization ID	
uid	User ID	

Exporting to iCalendar File

Action	Level	log
Export to iCalendar file	Important	[export_ical] personal_event [export_ical] personal_month_event

V-CUBE Meeting

Action	Level	log
Configuring e-mail addresses for Web conference systems	Important	[config] netmeeting_forward_mail (email:'**')

Properties	Meaning	Remarks
email	E-mail address for Web Conference system	

1.10.9.15. Logs of User Operations on Scheduler

Action	Level	log
New appointment	Important	[create] event (eid:**, event_title: '***', attendance_check:**)
Attendance	Important	[modify] attendance_status (eid:**, value:'**')
Leave appointments	Important	[modify] event (eid:**, event_title:**)
Attending Appointments	Important	[modify] event (eid:**, event_title:**)
Attendee responses to appointments	Important	[modify] attendance_status (eid:, value:'**', comment:'***')
Change response	Important	[modify] attendance_status (eid:**, value:'**', comment:'***')
Initializing attendee responses to appointments	Important	[modify] event (eid:**, event_title:'***', attendance_check:**, attendance_status_initialize:**)
Add attachment	Important	[create] file (eid:**, fid:**, file_name:'**')
Changing attachment file information	Important	[modify] file_information (eid:**, fid: **, file_name:'**', version_setting:**)
Deleting attachments	Important	[delete] file (eid:**, fid:**, file_name:'**')
Download attachment	General	[download] file(eid:**, fid:**, file_name:'**', version:**)
Deleting regular appointments [1]	Important	[delete] event (eid:**, event_title:'**', attendance_check:**)
Deleting an appointment period [1]	Important	[delete] event (eid:**, event_title:'**', attendance_check:**)
Deleting repeating appointments [1]	Important	[delete] event (eid:**, event_title:'**' range:'**', attendance_check:**)

Action	Level	log
Delete Tentative Appointments [1]	Important	[delete] event (eid:**, event_title:'**' tentative_appointment:'**', attendance_check:**)
Confirm Appointment	Important	[fix] event (eid:**, event_title:**)
Process request	Important	[modify] event_facility_approval (eid:**, faid:**, uid:**, status:'**', comment:'***')
Failure of adding appointment with Web conference	Error	[netmeeting_rsv_add] netmeeting_api_error (error_cd:***, error_msg:'***')
Failed to forward e-mail.	Warning	Could not forward the schedule notification
Writing an appointment comment	Important	[create] follow (eid:**, follow_id:**)

[1]: Excludes all system administration appointments.

Properties	Meaning	Remarks
attendance_check	Attendance	One of the following values is displayed: • 0 (not used) • 1 (use)
attendance_status_initialize	Initializing attendee responses to appointments	One of the following values is displayed: • 0 (Do not initialize responses) • 1 (Initialize responses)
comment	Comment	
eid	Event ID	
error_cd	V Cube Meeting Error code	
error_msg	V Cube Meeting Error messages	

Properties	Meaning	Remarks
event_title	Appointment Title	
fid	File ID	
file_name	File name	
follow_id	File name	
range	Scope of the appointment to be deleted	The time zone of the user who deleted the appointment is applied. The following values are displayed • only YYYY-MM-DD (This appointment only (YYYY MM DD Day)) • on and after YYYY-MM-DD (Planned for the DD and later days of the MM YYYY) • All (all appointments)
status	Results of facility usage requests	One of the following values is displayed: • Accept (Approval for facility usage requests) • Reject (rejection of facility usage requests)
tentative_appointment	start date and time of a tentative appointment	The time zone of the user who deleted the appointment is applied.
value	Results of attendance checks	One of the following values is displayed: • Attend • Absent (absent)
version_setting	Versioning settings	The following values are displayed • 0 (not managed) • -1 (unlimited)

Properties	Meaning	Remarks
		• Numbers other than 0 and-1 (number of generations)

1.10.10. Message Logs

System Administration

Action	Level	log
Searching Messages	General	[inspection_search] message (search_text:**, start:**, end:**, item_list_1:**, user_list_1:**)
View messages	General	[inspection_browse] message (mid:**, creator_name:**, subject:**, data:**, receiver_name_1:**)
Deleting Messages in Bulk	Important	[delete_all] message (timestamp:**)

Properties	Meaning	Remarks
creator_name	From user name	
data	Contents	
end	End timestamp for the search period	
Integers starting with Item_list_	Search Key	The following values are displayed • subjectdata • sender • addressee • follow

Properties	Meaning	Remarks
mid	Message ID	
Integers starting with receiver_name_	Recipient User Name	
search_text	Search string	
start	The start timestamp of the search period	
subject	Subject	
timestamp	Date to be deleted	
Integers starting with User_list_	Target User ID	

JavaScript and CSS Customization

Action	Level	Log
Add customization group	Important	[add] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Edit customization group	Important	[modify] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Delete customization group	Important	[delete] customization_group (id:*, name:'**', apply_status:'**', rid_1:*,oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)

Properties	Meaning	Remarks
apply_status	JavaScript and CSS customization	One of the following values is displayed: • applied (apply)

Properties	Meaning	Remarks
		• not applied (do not apply)
css_[integer starting from 1]	Files and links to be applied in CSS customization	
id	Customization group ID	
js_[integer starting from 1]	Files and links to be applied in the JavaScript customization	
name	Customization group name	
oid	Organization ID	
rid	Role ID	
uid	User ID	

User Actions

Action	Level	Log
Add folder	Important	[create] folder (folder_id:**, folder_name:**, parent_folder_id:**)
Editing folders	Important	[modify] folder (folder_id:**, folder_name:**)
Move Folder	Important	[move] folder (folder_id:**, parent_folder_id:**, list_index:**)
Deleting folders	Important	[delete] folder (folder_name:**)

Action	Level	Log
Adding messages	Important	[create] message (mid:**, creator_name:**, subject:**, data:**, file_name_1:**, receiver_name_1:**, maintainer_name_1:**)
Change Messages	Important	[modify] message (mid:**, creator_name:**, subject:**, data:**, receiver_name_1:**, maintainer_name_1:**)
Moving Messages	Important	[move] message (mid:**, creator_name:**, folder_id:**)
Delete Messages	Important	[delete] message (mid:**, creator_name:**, source_folder_id:**)
Permanently deleting messages	Important	[delete] message (mid:**, creator_name:**, subject:**, data:**, file_name_1:**, receiver_name_1:**)
Checking the status of messages	Important	[acknowledge] message (user_id:**, mid:**, subject:'**')
Post comments	Important	[create] follow (mid:**, fid:**, creator_name:**, subject:**, data:**, file_name_1:**)
Deleting comments	Important	[delete] follow (mid:**, fid:**, creator_name:**, subject:**, data:**, file_name_1:**)
Download attachment	General	[download] file (mid:**, fid:**, file_name:'**', version:**)

Properties	Meaning	Remarks
creator_name	From user name	
data	Contents	Up to 100 characters are output.
fid	Comment ID	
file_name	Attachment name	
Integers starting with file_name_	Attachment name	
folder_id	Folder ID	

Properties	Meaning	Remarks
folder_name	Folder names	
list_index	Order of folders in the same level	
Integers starting with maintainer_name_	User name that you want to allow to be changed or deleted	
mid	Message ID	
parent_folder_id	Parent folder ID	
Integers starting with receiver_name_	Recipient User Name	
source_folder_id	Source folder ID	
subject	Subject	
user_id	User ID	
version	Version of attachment	

1.10.11. Bulletin Board Logs

System Administration

General Settings

Action	Level	Log
• Default status of comment permission • Permission to use rich text formatting • Allow the use of anchor links in comments • Request acknowledgement status by default • Manually enter "From" name	Important	[config] common (enable_follow:'**', enable_htmleditor:'**', enable_follow_link:'**', enable_acknowledgement:'**', enable_manually_enter_sender:'**', default_value_from:**, enable_confirm_authority_read_and_notification_users:'**')

Properties	Meaning	Remarks
default_value_from	Default "From" name	One of the following values is displayed: • 0 (User name) • 1 (Manually entered)
enable_acknowledgement	Request acknowledgement status by default	One of the following values is displayed: • TRUE (allow) • FALSE (do not allow)
enable_confirm_authority_read_and_notification_users	Access permissions and notification recipients	One of the following values is displayed: • TRUE (allow) • FALSE (do not allow)
enable_follow	Default status of comment permission	One of the following values is displayed: • TRUE (allow) • FALSE (do not allow)
enable_follow_link	Allow the use of anchor links in comments	One of the following values is displayed: • TRUE (allow) • FALSE (do not allow)
enable_htmleditor	Permission to use rich text formatting	One of the following values is displayed: • TRUE (allow) • FALSE (do not allow)

Properties	Meaning	Remarks
enable_manually_enter_sender	Manually enter "From" name	One of the following values is displayed: • TRUE (allow) • FALSE (do not allow)

Setting Categories

Action	Level	Log
Adding Categories	Important	[create] category (cid:**, name:**, foreign_key:**, parent:**)
Change categories	Important	[modify] category (cid:**, name:**, foreign_key:**)
Move categories	Important	[move] category (cid:**, parent:**, list_index:**)
Delete categories	Important	[delete] category (cid:**)
Import categories	Important	[import] category [create] category (cid:**, foreign_key:**, name:**, parent:**) [modify] category (cid:**, foreign_key:**, name:**)
Export categories	Important	[export] category
Add display name	Important	[create] category_local (cid:**, language_code:'**', category_name:'**')
Change display name	Important	[modify] category_local (cid:**, language_code:'**', prev_category_name:'**', next_category_name:'**')
Delete display name	Important	[delete] category_local (cid:**, language_code:'**', category_name:'**')
Import Display Name (added)	Important	[import] category_local (cid:**, language_code:'**', category_name:'**')
Import display name (changed)	Important	[import] category_local (cid:**, language_code:'**', prev_category_name:'**', next_category_name:'**')

Action	Level	Log
Import Display Name (delete)	Important	[import_delete] category_local (cid:**, language_code:'**', category_name:'**')
Export Display Name	Important	[export] category_local (cid:**, language_code: '**', category_name:'**')

Properties	Meaning	Remarks
cid	Category ID	
foreign_key	Category key	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
list_index	Order of categories in the same level	
name	Category Names	
next_category_name	Category name after the change	
parent	Parent category ID	
prev_category_name	Original category names	

User Rights Settings

Action	Level	Log
Change security model	Important	[modify] category (cid:**, security_model:**)
Add new entry	Important	[create] access (cid:**, security_model:**, uid/gid/rid/dynamic_role:**, auth:**)
Changing permissions	Important	[modify] access (cid:**, security_model:**, uid/gid/rid/dynamic_role:**, auth:**)
Delete User Rights	Important	[delete] access (cid:**, security_model:**, uid/gid/rid/dynamic_role:**)
Delete all permissions	Important	[delete_all] access (cid:**, target:**)
Import from CSV file	Important	[create] access (cid:**, security_model:'**', uid/gid/rid/dynamic_role:**, auth:'**') [modify] access (cid:**, security_model:'**', uid/gid/rid/dy namic_role:**, auth:'**') [import] access
Export to CSV file	Important	[export] access

Properties	Meaning	Remarks
auth	Permissions	Displays one of the following values: • read • write • read/write • write/follow • read/write/follow
cid	Category ID	
gid	Organization ID	
rid	Static Role ID	
security_model	Security model	One of the following values is displayed: • revoke

Properties	Meaning	Remarks
		• grant
target	Target Object	
uid	User ID	

Operational Administrators Settings

Action	Level	Log
Adding operational administrative privileges	Important	[create] privilege (cid:**, uid/gid/rid/dynamic_role:**)
Delete Operational Administrative Privileges	Important	[delete] privilege (cid:**, uid/gid/rid/dynamic_role:**)
Delete all operational administrative privileges	Important	[delete_all] privilege (cid:**, target:**)
Import from CSV File	Important	[create] privilege (cid:**, uid/gid/rid/dynamic_role:**) [modify] privilege (cid:**, uid/gid/rid/dynamic_role:**) [import] privilege
Export to CSV File	Important	[export] privilege

Properties	Meaning	Remarks
cid	Category ID	
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
gid	Organization ID	
rid	Static Role ID	

Properties	Meaning	Remarks
target	Target Object	
uid	User ID	

Notification Settings

Action	Level	Log
Forcing notifications	Important	[modify] category (cid:**, force_notify:**)
Adding notification settings	Important	[create] notify (cid:**, uid/gid/rid/dynamic_role:**)
Deleting notification settings	Important	[delete] notify (cid:**, uid/gid/rid/dynamic_role:**)
Delete all notifications	Important	[delete_all] notify (cid:**, target:**)

Properties	Meaning	Remarks
cid	Category ID	
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
force_notify	Do not allow update notifications to be cleared	One of the following values is displayed: • 1 (do not allow) • 0 (allow)
gid	Organization ID	
rid	Static Role ID	
target	Target Object	Displays one of the following values: • usergroup • role • dynamic_role

Properties	Meaning	Remarks
uid	User ID	

User Actions

Action	Level	Log
Adding a topic	Important	[create] article (aid:**, creator_name:'**', subject:'**', can_follow:**, start_timestamp:**, end_timestamp:**, enable_acknowledgement:**, maintainer_name_1:'**', maintainer_name_N:'**')
Change Topics	Important	[modify] article (aid:**, creator_name:'**', subject:'**', can_follow:**, start_timestamp:**, end_timestamp:**, enable_acknowledgement:**, maintainer_name_1:'**', maintainer_name_N:'**', notify_check:'**')
Moving topics	Important	[move] article (aid:**)
Delete Topics	Important	[delete] article (aid:**, subject:'**')
View topics	General	[browse] article (cid:**, aid:**, subject:'**', uid:**)
Save Draft	Important	[create] draft (aid:**)
Changing the draft	Important	[modify] draft (aid:**) [modify] draft (aid:**)
Delete Draft	Important	[delete] draft (aid:**)
Post comments	Important	[create] follow (aid:**, follow_id:**)
Deleting comments	Important	[delete] follow (aid:**, follow_id:**)
Attachment of comments	Important	[create] file (aid:**, follow_id:**, fid:**)
Deleting files in comments	Important	[delete] file (aid:**, follow_id:**, fid:**)
Preserve attachment	Important	[create] file (aid:**, fid:**)

Action	Level	Log
Deleting attachments	Important	[delete] file (aid:**, fid:**)
Download attachment	General	[download] file (uid:**, fid:**, version:**, name:**)

Properties	Meaning	Remarks
aid	Bulletin ID	
can_follow	Allow comment writing	One of the following values is displayed: • 1 (allow) • 0 (do not allow)
creator_name	From	
enable_acknowledgment	Request acknowledgement status by default	One of the following values is displayed: • 1 (Confirm the status) • 0 (Do not request acknowledgment status by default)
end_timestamp	End timestamp of the bulletin period	
maintainer_name_[integer starting from 1]	User name that you want to allow to be changed or deleted	
name	Attachment file name	
notify_check	Status of the "Notify this update" option	One of the following values is displayed: • ON (Notify the changes of topic contents) • OFF (Do not notify the changes of topic contents)
start_timestamp	The start timestamp of the bulletin period	

Properties	Meaning	Remarks
subject	Subject	
uid	User ID	
version	Version of attachment	

1.10.12. Logs for Cabinet

System Administration

Setting up Folders

Action	Level	log
Adding folders	Important	[create] folder (hid:**, folder:**)
Editing folders	Important	[modify] folder (hid:**, folder:**)
Reorder folders	Important	[order] folder (hid:**, folder:**)
Move Folder	Important	[move] folder (hid:**, src_hid:**, dst_hid:**, folder:**)
Deleting folders	Important	[delete] folder (hid:**, folder:**)
Reverting a folder	Important	[restore] folder (did:**, folder:'**', pdid:**)
Import from CSV file	Important	[import] folder [import] folder (hid:**, folder:**, operation:**)
Export to CSV file	Important	[export] folder

Action	Level	log
Add display name	Important	[create] folder_local (hid:**, language_code:'**', folder_name:'**')
Change display name	Important	[modify] folder_local (hid:**, language_code:'**', prev_folder_name:'**', next_folder_name:'**')
Delete display name	Important	[delete] folder_local (hid:**, language_code:'**', folder_name:'**')
Import Display Name	Important	[import] folder_local (hid:**, language_code:'**', folder_name:'**')
Import display name (changed)	Important	[import] folder_local (hid:**, language_code:'**', prev_folder_name:'**', next_folder_name:'**')
Import Display Name (delete)	Important	[import_delete] folder_local (hid:**, language_code:'**', folder_name:'**')
Export Display Name	Important	[export] folder_local (hid:**, languageCode:'**', folder_name:'**')

Properties	Meaning	Remarks
dst_hid	Destination Folder ID	
folder	Folder title	
hid	Folder ID	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.

Properties	Meaning	Remarks
next_folder_name	Renamed folder name	
operation	Operation Details	One of the following values is displayed: • create • update
prev_folder_name	The name of the folder before the change	
src_hid	SOURCE Folder ID	

User Rights Settings

Action	Level	log
Add new entry	Important	[create] access (hid:**, uid/oid/rid:**, folder:**, security_model:**, auth:**)
Delete User Rights	Important	[delete] access (hid:**, uid/oid/rid:**, folder:**, security_model:**)
Changing permissions	Important	[modify] access (hid:**, uid/oid/rid:**, folder:**, security_model:**, auth:**)
Delete all permissions	Important	[delete_all] access (hid:**, folder:**)
Change security model	Important	[modify] access (hid:**, folder:**, security_model:**)
Import from CSV file	Important	[import] access [import] access (hid:**, uid/oid/rid:**, folder:**, security_model:**, auth:**)
Export to CSV file	Important	[export] access

Properties	Meaning	Remarks
auth	Permissions	One of the following values is displayed: • read • write • read/write
folder	Folder title	
hid	Folder ID	
oid	Organization ID	
rid	Role ID	
security_model	Security model	One of the following values is displayed: • revoke • grant
uid	User ID	

Operational Administrators Settings

Action	Level	Log
Adding operational administrative privileges	Important	[create] privilege (fid:**, uid/gid/rid/dynamic_role:**)
Delete Operational Administrative Privileges	Important	[delete] privilege (fid:**, uid/gid/rid/dynamic_role:**)
Delete all operational administrative privileges	Important	[delete_all] privilege (fid:**, target:**)
Import from CSV File	Important	[create] privilege (fid:**, uid/gid/rid/dynamic_role:**) [modify] privilege (fid:**, uid/gid/rid/dynamic_role:**) [import] privilege
Export to CSV File	Important	[export] privilege

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
fid	Folder ID	
gid	Organization ID	
rid	Static Role ID	
target	Target Object	
uid	User ID	

User Actions

Action	Level	log
Download file	General	[download] file (hid:**, fid:**, file_name:**, title:**, version:**)
Download in bulk	General	[download] file (hid:**, fid:**, file_name:**, title:**, version:**, compress:1)
Registering files	Important	[create] file (hid:**, fid:**, file_name:**, title:**, version_setting:**)
Updating Files	Important	[update] file (hid:**, fid:**, file_name:**, title:**, version:**)
Changing File Information	Important	[modify] file_information (hid:**, fid:**, file_name:**, title:**, version_setting:**)
Moving files	Important	[move] file (fid:**, src_hid:**, dst_hid:**, file_name:**, title:**)

Action	Level	log
Deleting Files	Important	[delete] file (hid:**, fid:**, file_name:**, title:**)
File Resurrection	Important	[restore] file (hid:**, fid:**, file_name:**, title:**, version:**)

Properties	Meaning	Remarks
compress	Compressed file	Always displays one.
dst_hid	Destination Folder ID Garbage (Trash)	
fid	File ID	
file_name	File name	
hid	Folder ID Folder ID that belongs to trash	
src_hid	SOURCE Folder ID Garbage (Trash)	
title	File title	
version	Version	
version_setting	Versioning settings	Displays one of the following values: • 0 (not managed) • -1 (unlimited) • Numbers other than 0 and-1 (number of generations)

1.10.13. Logs of Memo

System Administration

Action	Level	log
• Maximum total file size • Permission to use rich text formatting	Important	[config] common (filesize_limit:**, enable_htmleditor:**)

Properties	Meaning	Remarks
enable_htmleditor	Permission to use rich text formatting	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
filesize_limit	Maximum total file size	Displays one of the following values: • -1 (unlimited) • 0 (not available) • Number of bytes in set value

User Actions

Action	Level	log
Adding folders	Important	[create] folder (did:**, folder:**, pdid:**)
Editing folders	Important	[modify] folder (did:**, folder:**, pdid:**)
Deleting folders	Important	[delete] folder (did:**, folder:**, pdid:**)
Adding notes	Important	[create] memo (iid:**, title:**, did:**)
Changing the memo	Important	[modify] memo (iid:**, title:**, did:**)

Action	Level	log
Deleting notes	Important	[delete] memo (iid:**, title:**, did:**)
Registering files	Important	[create] file (did:**, fid:**, file_name:**, title:**, version_setting:**)
Updating Files	Important	[update] file (did:**, fid:**, file_name:**, title:**, version:**)
Changing File Information	Important	[modify] file_information (did:**, fid:**, file_name:**, title:**, version_setting:**)
Deleting Files	Important	[delete] file (did:**, fid:**, file_name:**, title:**)
File Resurrection	Important	[restore] file (did:**, fid:**, file_name:**, title:**, version:**)

Properties	Meaning	Remarks
did	Folder ID	0 (updated list)
fid	File ID	
file_name	File name	
folder	Folder title	
iid	Memo ID	
pdid	Parent folder ID	
title	Notes Title File title	
version	Version	
version_setting	Versioning settings	Displays one of the following values: • 0 (not managed) • -1 (unlimited)

Properties	Meaning	Remarks
		• Numbers other than 0 and-1 (number of generations)

1.10.14. Logs of Phone Messages

System Administration

User Rights Settings

Action	Level	log
Add new entry	Important	[create] access (object_user/object_group/object_role:**, access_user/ access_group/access_static_role/ access_dynamic_role:**, auth:**)
Changing permissions	Important	[modify] access (object_user/object_group/object_role:**, access_user/ access_group/access_static_role/ access_dynamic_role:**, auth:**)
Delete User Rights	Important	[delete] access (object_user/object_group/object_role:**, access_user/ access_group/access_static_role/ access_dynamic_role:**)
Delete all permissions	Important	[delete_all] access(object_user/object_group/ object_role:**)
Change security model	Important	[modify] access (object_user/object_group/object_role:**, security_model:**)

Action	Level	log
Import from CSV file	Important	[import] access
Export to CSV file	Important	[export] access

Properties	Meaning	Remarks
access_dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
access_group	Organization ID	
access_static_role	Static ID	
access_user	User ID	
auth	Permissions	Displays one of the following values: • add • browse • add/browse
object_group	Target Organization ID	
object_role	Target role ID	
object_user	User ID to be accessed	

Personal Settings

Action	Level	log
Forwarding E-mail Settings	Important	[config] forward_mail (forward_email:**[, email_address:**])

Properties	Meaning	Remarks
email_address	When the value of Forward_email is user_established, the e-mail address	
forward_email	Types of notifications	Displays one of the following values: • off • user_info • user_established

User Actions

Action	Level	log
Adding phone messages	Important	[create] phone_message (mid:**, client_name:**, matter:**, telephone_number:**, message:**, sender:**, receiver:**, send_time:**)
Deleting phone messages	Important	[delete] phone_message (mid:**)
Checking phone messages	Important	[modify] phone_message (mid:**, confirm_time:**)
Failed to forward e-mail.	Warning	Could not forward the phonemessage notification

Properties	Meaning	Remarks
client_name	Client	
confirm_time	Confirm Time Timestamp	
matter	Requirements	
message	Message	
mid	Memo ID	

Properties	Meaning	Remarks
receiver	Recipient ID	
send_time	Time stamp	
sender	Sender ID	
telephone_number	Phone number	

1.10.15. Timesheet Logs

System Administration

General Settings

Action	Level	log
Auto Punch Settings	Important	[config] common (auto_punchout:**)
Start date of the aggregation	Important	[config] common (offset_day:**)
Month View	Important	[config] common (offset_month:**)
Maximum number of outings or returns	Important	[config] common (absence_max:**)
The time when the date is changed	Important	[config] common (change_of_day:**)
Allow users to modify the time	Important	[config] common (user_modify:**)

Properties	Meaning	Remarks
absence_max	Maximum number of outings or returns	A number is displayed.
auto_punchout	Automatic Punch	One of the following values is displayed: • 0 • 1
change_of_day	The time when the date is changed	Displays a value that represents the time.
offset_day	Start date of the aggregation	A number is displayed.
offset_month	Month View	The number to add to the summary start month is displayed.
user_modify	Allow users to change the time	One of the following values is displayed: • 0 • 1

User Actions

Action	Level	log
Changing the time	Important	[modify] record (uid:**, id:**, date:**, in_src:**, out_src:**, absence_out_src_1:**, absence_in_src_1:**, in_dst:**, out_dst:**, absence_out_dst_1:**, absence_in_dst_1:**)

Properties	Meaning	Remarks
Integers starting with Absence_in_dst_	Change back Time	
absence_in_src_[integer starting with 1]	Back time of change	

Properties	Meaning	Remarks
Integers starting with Absence_out_dst_	Out-of-Office time	
Integers starting with absence_out_src_	Time out before the change	
date	Date	The format is YY/MM/DD.
id	Record ID	
in_dst	Post-Change time	
in_src	Time before the change	
out_dst	Changed the time of the retreat company	
out_src	End time	
uid	User ID	

1.10.16. To-Do List Logs

Personal Settings

Action	Level	Log
Adding Categories	Important	[create] category (cid:**, title:**)
Delete Category	Important	[delete] category (cid:**)

Properties	Meaning	Remarks
cid	Category ID	
title	Category names	

User Actions

Action	Level	log
Add To-Dos	Important	[create] todo (tid:**, cid:**, title:**)
Changing to-do	Important	[modify] todo (tid:**, cid:**, title:**)
Delete to-do	Important	[delete] todo (tid:**)
Complete To-Dos	Important	[finish] todo (tid:**)

Properties	Meaning	Remarks
cid	Category ID	
tid	ID of To-do	
title	To-Do	

1.10.17. Address Book Logs

System Administration

Book List

Action	Level	log
Creating workbooks	Important	[create] shared_address_book (bid:**, display_name:**, type:**, id:**)
Changing books	Important	[modify] shared_address_book (bid:**, display_name:**, id:**)
Reorder books	Important	[order] shared_address_book (bid:**, list_index:**)
Deleting books	Important	[delete] shared_address_book (bid:**)
Add display name	Important	[create] sharedbook_local (bid:'**', language_code:'**', sharedbook_name:'**')
Change display name	Important	[modify] sharedbook_local (bid:'**', language_code:'**', prev_sharedbook_name:'**', next_sharedbook_name:'**')
Delete display name	Important	[delete] sharedbook_local (bid:'**', language_code:'**', sharedbook_name:'**')

Properties	Meaning	Remarks
bid	Book ID	
display_name	Book Name	
id	Record ID	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
list_index	Descending number	

Properties	Meaning	Remarks
next_sharedbook_name	Changed book name	
prev_sharedbook_name	Name of the book before the change	
sharedbook_name	Name	
type	Book Type	

Setting Items in Shared Address Books

Action	Level	log
Changing built-in fields	Important	[config] private_address_card_item (iid:**, use:**, necessary:**, not_modify:**, display:**, sso:**)
Adding Custom Items	Important	[create] private_address_card_item (iid:**, id:**, type:**, use:**, necessary:**, not_modify:**, display:**, sso:**)
Changing custom items	Important	[modify] private_address_card_item (iid:**, use:**, necessary:**, not_modify:**, display:**, sso:**, display_name:**, id:**)
Reorder Customization Items	Important	[order] private_address_card_item (iid:**, list_index:**)
Delete customization Items	Important	[delete] private_address_card_item (iid:**)

Properties	Meaning	Remarks
display	List view	One of the following values is displayed: • 0 • 1
display_name	Book Name	
id	Record ID	

Properties	Meaning	Remarks
iid	Item ID	
list_index	Descending number	
necessary	Required Field	One of the following values is displayed: • 0 • 1
not_modify	Immutable fields	One of the following values is displayed: • 0 • 1
sso	Single Sign-on ID	
type	Book Type	
use	Items used	One of the following values is displayed: • 0 • 1

Setting Items in Personal Address Books

Action	Level	log
Changing built-in fields	Important	[config] private_address_card_item (iid:**, use:**, necessary:**, not_modify:**, display:**, sso:**)
Adding Custom Items	Important	[create] private_address_card_item (iid:**, id:**, type:**, use:**, necessary:**, not_modify:**, display:**, sso:**)
Changing custom items	Important	[modify] private_address_card_item (iid:**, use:**, necessary:**, not_modify:**, display:**, sso:**, display_name:**, id:**)
Reorder Customization Items	Important	[order] private_address_card_item (iid:**, list_index:**)
Delete customization Items	Important	[delete] private_address_card_item (iid:**)

Properties	Meaning	Remarks
display	List view	One of the following values is displayed: • 0 • 1
display_name	Book Name	
id	Record ID	
iid	Item ID	
list_index	Descending number	
necessary	Required Field	One of the following values is displayed: • 0 • 1
not_modify	Immutable fields	One of the following values is displayed: • 0 • 1
sso	Single Sign-on ID	
type	Book Type	
use	Items used	One of the following values is displayed: • 0 • 1

Setting up User Permissions

Action	Level	log
Creating permissions	Important	[create] availability (uid/gid/rid/dynamic_role:**, authorities:**)
Delete permissions	Important	[delete] availability (uid/gid/rid/dynamic_role:**)

Action	Level	log
Delete all permissions	Important	[delete_all] availability
Change security model	Important	[config] availability (security_model:**)

Properties	Meaning	Remarks
authorities	Permission	One of the following values is displayed: • private_address • shared_address
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
gid	Organization ID	
rid	Static Role ID	
security_model	Security model	One of the following values is displayed: • grant • revoke
uid	User ID	

Operational Administrators Settings

Action	Level	log
Creating operational Administrative privileges	Important	[create] privilege (bid:**, uid/gid/rid/dynamic_role:**)
Delete Operational Administrative Privileges	Important	[delete] privilege (bid:**, uid/gid/rid/dynamic_role:**)
Delete all operational administrative privileges	Important	[delete_all] privilege (bid:**)

Properties	Meaning	Remarks
bid	Book ID	
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
gid	Organization ID	
rid	Static Role ID	
uid	User ID	

User Rights Settings

Action	Level	log
User Rights	Important	[create] access (bid:**, uid/gid/rid/dynamic_role:**, auth:**)
Changing permissions	Important	[modify] access (bid:**, uid/gid/rid/dynamic_role:**, auth:**)
Delete User Rights	Important	[delete] access (bid:**, uid/gid/rid/dynamic_role:**)
Delete all permissions	Important	[delete_all] access (bid:**)
Change security model	Important	[modify] access (bid:**, security_model:**)

Properties	Meaning	Remarks
auth	Access Permissions	Displays one of the following values: • browse • editing • browse/editing
bid	Book ID	

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
gid	Organization ID	
rid	Static Role ID	
security_model	Security model	One of the following values is displayed: • grant • revoke
uid	User ID	

Import from CSV File

Action	Level	log
Import Address Book	Important	[import] shared_address_book (bid:**)
Import access rights (registered)	Important	[import] shared_address_book (bid:**) [create] access (bid:**, uid/gid/rid/dynamic_role:**, auth:**)
Import permissions	Important	[import] shared_address_book (bid:**) [modify] access (bid:**, uid/gid/rid/dynamic_role:**, auth:**)

Properties	Meaning	Remarks
auth	Access Permissions	Displays one of the following values: • browse • editing • browse/editing
bid	Book ID	

Properties	Meaning	Remarks
dynamic_role	Dynamic Role Key	Displays one of the following values: • Everyone • LoginUser • Administrators
gid	Organization ID	
rid	Static Role ID	
uid	User ID	

Export to CSV File

Action	Level	log
Export Address Book	Important	[export] shared_address_book (bid:**)
Exporting User Rights	Important	[export] shared_address_book_access (bid:**)

Personal Settings

Setting Items to Show

Action	Level	log
User list	Important	[config] userlist_card_item (attendee:**, description:**, email_address:**, image:**, post:**, primary_group:**, sort_key:**, telephone_number:**, url:**, usergroups:**)
Shared Address Book	Important	[config] shared_address_card_item (bid:**, company_name:**, company_sort_key:**, company_telephone_number:**, description:**, email_address:**, facsimile_number:**, image:**, map:**, personal_name:**, personal_sort_key:**, personal_telephone_number:**, physical_address:**, post_name:**, route:**, section_name:**, url:**, zip_code:**)

Action	Level	log
- Personal Address Book	Important	[config] private_address_card_item (company_name:**, company_sort_key:**, company_telephone_number:**, description:**, email_address:**, facsimile_number:**, image:**, map:**, personal_name:**, personal_sort_key:**, personal_telephone_number:**, physical_address:**, post_name:**, route:**, section_name:**, url:**, zip_code:**)

Properties	Meaning	Remarks
attendee	Presence information	One of the following values is displayed: • 0 • 1
bid	Book ID	
company_name	Company Name	One of the following values is displayed: • 0 • 1
company_sort_key	Company Name (pronunciation)	One of the following values is displayed: • 0 • 1
company_telephone_number	Office Phone Number	One of the following values is displayed: • 0 • 1
description	Memo	One of the following values is displayed: • 0 • 1
email_address	E-mail	One of the following values is displayed: • 0 • 1

Properties	Meaning	Remarks
facsimile_number	Company Fax Number	One of the following values is displayed: • 0 • 1
image	Picture	One of the following values is displayed: • 0 • 1
map	Map	One of the following values is displayed: • 0 • 1
personal_name	Name of individual	One of the following values is displayed: • 0 • 1
personal_sort_key	Pronunciation	One of the following values is displayed: • 0 • 1
personal_telephone_number	Personal Phone Number	One of the following values is displayed: • 0 • 1
physical_address	Address	One of the following values is displayed: • 0 • 1
post	Job title	One of the following values is displayed: • 0 • 1
post_name	Job Title	One of the following values is displayed: • 0 • 1

Properties	Meaning	Remarks
primary_group	Priority organization	One of the following values is displayed: • 0 • 1
route	Route	One of the following values is displayed: • 0 • 1
section_name	Division Name	One of the following values is displayed: • 0 • 1
sort_key	Pronunciation	One of the following values is displayed: • 0 • 1
telephone_number	Contacts	One of the following values is displayed: • 0 • 1
url	URL	One of the following values is displayed: • 0 • 1
usergroups	Organization	One of the following values is displayed: • 0 • 1
value	Available Values	
zip_code	Zip code	One of the following values is displayed: • 0 • 1

Importing Personal Address Books

Action	Level	Log
Import from CSV File	Important	[import] private_address_book

Exporting Personal Address Books

Action	Level	Log
Export to CSV File	Important	[export] private_address_book

User Actions

Action	Level	log
Adding to a shared address book	Important	[create] shared_address_card (cid:**, bid:**, subject:'**', given_name:'**', family_name:'**', given_sort_key:'**', family_sort_key:'**', company_name:'**', company_sort_key:'**', section_name:'**', zip_code:**, physical_address:'**', route:'**', route_time:**, route_fare:**, company_telephone_number:**, facsimile_number:**, url:'**', post_name:'**', personal_telephone_number:**, email_address:'**', image:'**', description:'**')
Changing address data in shared address books	Important	[modify] shared_address_card (cid:**, bid:**, subject:'**', given_name:'**', family_name:'**', given_sort_key:'**', family_sort_key:'**', company_name:'**', company_sort_key:'**', section_name:'**', zip_code:**, physical_address:'**', route:'**', route_time:**, route_fare:**, company_telephone_number:**, facsimile_number:**, url:'**', post_name:'**', personal_telephone_number:**, email_address:'**', image:'**', description:'**')
Deleting address data in shared address books	Important	[delete] shared_address_card (bid:**, cid:**)
Adding to the Personal Address Book	Important	[create] private_address_card (cid:**, uid:**, subject:'**', given_name:'**', family_name:'**', given_sort_key:'**',

Action	Level	log
		family_sort_key:'**', company_name:'**', company_sort_key:'**', section_name:'**', zip_code:**, physical_address:'**', route:'**', route_time:**, route_fare:**, company_telephone_number:**, facsimile_number:**, url:'**', post_name:'**', personal_telephone_number:**, email_address:'**', image:'**', description:'**')
Changing address data in the Personal Address Book	Important	[modify] private_address_card (cid:**, uid:**, subject:'**', given_name:'**', family_name:'**', given_sort_key:'**', family_sort_key:'**', company_name:'**', company_sort_key:'**', section_name:'**', zip_code:**, physical_address:'**', route:'**', route_time:**, route_fare:**, company_telephone_number:**, facsimile_number:**, url:'**', post_name:'**', personal_telephone_number:**, email_address:'**', image:'**', description:'**')
Deleting address data in the Personal Address Book	Important	[delete] private_address_card (cid:**tu)

Properties	Meaning	Remarks
bid	Book ID	
cid	Data ID	
company_name	Company Name	
company_sort_key	Company Name (pronunciation)	
company_telephone_number	Office Phone Number	
description	Memo	
display_name	Book Name	

Properties	Meaning	Remarks
email_address	E-mail	
facsimile_number	Company FAX Number	
family_name	Last Name	
family_sort_key	Personal name (pronunciation)	
given_name	Name of individual	
given_sort_key	Name (pronunciation)	
id	Record ID	
image	Picture	
personal_telephone_number	Personal Phone Number	
physical_address	Address	
post_name	Job Title	
route	Route route	
route_fare	Route fares	
route_time	Route duration	
section_name	Division Name	
subject	Subject	
uid	User ID	
url	URL	

Properties	Meaning	Remarks
zip_code	Zip code	

1.10.18. Logs of E-Mail

System Administration

General Settings

Action	Level	Log
• Stopping the e-mail client function • Check new e-mail when logging in • Receive e-mails automatically • Incremental search • Referencing images in HTML e-mail • Default HTML e-mail view • Send and receive log feature • Operations for e-mail account • Leave E-mail on incoming mail server • Checking new e-mails feature • Receiving e-mails in bulk feature • Sending HTML e-mails feature • Automatic e-mail forwarding • Read receipts feature • Status management feature • E-mail screen settings	Important	[config] general (disable_mail:**, check_mail_on_login:**, incremental_search:**, deny_use_html_pict:**, mail_display_plaintext:**, deny_use_history:**, allow_account_operation:'**', deny_leave:**, deny_check_mails:**, deny_all_receive:**, deny_send_html_mail:**, automatic_mail:'**', deny_use_confirm:**, deny_use_status:**, screen_layout_2pane:**, screen_layout_3pane:**)

Properties	Meaning	Remarks
allow_account_operation	Allow operations for e-mail account	Displays one of the following values: • all (allow add, edit, and delete) • modify (only change allowed) • none (do not allow)
auto_receive_period	Automatic receive interval (hours)	
auto_receive_time_[integer starting from 1]	E-mail Auto-Receive time	The format is HHMM.
automatic_mail	Allow automatic e-mail forwarding	One of the following values is displayed: • 0 • 1
check_mail_on_login	Check new E-mail when logging in	
deny_all_receive	Permission to receive bulk e-mails	One of the following values is displayed: • 0 • 1
deny_check_mails	Permission to check the new e-mail	One of the following values is displayed: • 0 • 1
deny_leave	Permission to leave E-mail on incoming mail server	One of the following values is displayed: • 0 • 1
deny_send_html_mail	Permission to send HTML e-mail	One of the following values is displayed: • 0 • 1

Properties	Meaning	Remarks
deny_use_confirm	Permission to use the Read receipt function	One of the following values is displayed: • 0 • 1
deny_use_history	Permission to use send and receive logs function	One of the following values is displayed: • 0 • 1
deny_use_html_pict	Permission to view images in HTML e-mail	One of the following values is displayed: • 0 • 1
deny_use_status	Permission to use the status management function	One of the following values is displayed: • 0 • 1
disable_mail	Setting of stopping the e-mail client function	One of the following values is displayed: • 0 • 1
incremental_search	Using incremental search	One of the following values is displayed: • 0 • 1
mail_display_plaintext	Displaying only text	One of the following values is displayed: • 0 • 1
screen_layout_2pane	2 panes (hide preview)	One of the following values is displayed: • 0 • 1
screen_layout_3pane	3 Panes (display preview)	One of the following values is displayed: • 0

Properties	Meaning	Remarks
		• 1

Setting E-Mail Servers

Action	Level	Log
Register mail servers	Important	[create] server (server_id:**, foreign_key:'**', name:'**', smtp:'**', smtp_port:**, smtp_ssl:*, smtp_starttls:*, smtp_auth:'**', pop_before_smtp:*, smtp_timeout_sec:**, retrieve_protocol:'**', retrieve:'**', retrieve_port:**, retrieve_ssl:*, retrieve_auth:'**', retrieve_timeout_sec:**, oauth_client_code:'**')
Change mail server	Important	[modify] server (server_id:*, foreign_key:'**', name:'**', smtp:'**', smtp_port:**, smtp_ssl:*, smtp_starttls:*, smtp_auth:'**', pop_before_smtp:*, smtp_timeout_sec:**, retrieve_protocol:'**', retrieve:'**', retrieve_port:**, retrieve_ssl:*, retrieve_auth:'**', retrieve_timeout_sec:**, oauth_client_code:'**')
Delete mail servers	Important	[delete] server (server_id:**, foreign_key:'**', name:'**', smtp:'**', smtp_port:**, smtp_ssl:*, smtp_starttls:*, smtp_auth:'**', smtp_timeout_sec:**, retrieve_protocol:'**', retrieve:'**', retrieve_port:**, retrieve_ssl:*, retrieve_auth:'**', retrieve_timeout_sec:**, oauth_client_code:'**', pop3_ssl:*)

Properties	Meaning	Remarks
foreign_key	Mail server code	
imap4_ssl	Whether to use TLS for communications with the incoming mail server	Output if the receive protocol is IMPA4. One of the following values is displayed: • 0 • 1

Properties	Meaning	Remarks
name	Name of mail server	
oauth_client_code	OAuth client code	Output when OAuth is used to send/receive e-mails. An OAuth client code for the OAuth client you are using will be displayed. It is a code automatically configured by Garoon.
pbsmtp_wait_sec	Wait seconds before sending POP before SMTP	
pop_before_smtp	Whether to use Authenticate before sending e-mail (POP before SMTP)	One of the following values is displayed: • 0 • 1
pop3_ssl	Whether to use TLS for communications with the incoming mail server	Output if the receive protocol is POP3. One of the following values is displayed: • 0 • 1
retrieve	Incoming mail server	
retrieve_auth	Incoming authentication method	Output if the receive protocol is POP3. Displays one of the following values: • APOP • USER • XOAUTH2
retrieve_port	Incoming port number	
retrieve_protocol	Protocol for incoming e-mails	One of the following values is displayed: • POP3

Properties	Meaning	Remarks
		• IMAP4
retrieve_ssl	Whether to use TLS for communications with the incoming mail server	One of the following values is displayed: • 0 • 1
retrieve_timeout_sec	Time to timeout (in seconds) for receiving	
server_id	Mail server ID	
smtp	Outgoing mail server name (SMTP)	
smtp_auth	SMTP authentication method	Output when the outgoing e-mail server supports SMTP authentication. Displays one of the following values: • NONE • PLAIN • LOGIN • CRAM-MD5 • DIGEST-MD5 • XOAUTH2
smtp_ssl	Whether to use TLS for communications with the outgoing mail server	One of the following values is displayed: • 0 • 1
smtp_starttls	Whether to use STARTTLS to communicate with the outgoing mail server	One of the following values is displayed: • 0 • 1

Properties	Meaning	Remarks
smtp_timeout_sec	Time to timeout (in seconds) for sending	

User Accounts

Action	Level	Log
Add user account	Important	[create] account (account_id:**, account_code:**, account_name:**, mail_server:**, email:**, retrieve_account:**, retrieve_save:**, smtp_account:**, disabled:**)
Change user account	Important	[modify] account (account_id:**, account_code:**, account_name:**, mail_server:**, email:**, retrieve_account:**, retrieve_save:**, smtp_account:**, disabled:**)
Delete user account	Important	[delete] account (account_id:**, account_code:**, account_name:**, mail_server:**, email:**, retrieve_account:**, retrieve_save:**, smtp_account:**, disabled:**)

Properties	Meaning	Remarks
account_code	User account code	
account_id	Account ID	
account_name	User account name	
disabled	Status	One of the following values is displayed: • 0 • 1
email	E-mail address	
mail_server	Mail Servers	

Properties	Meaning	Remarks
retrieve_account	Incoming e-mail account name	
retrieve_save	Leave E-mail on incoming mail server	One of the following values is displayed: • LEAVE • DELETE
smtp_account	Outgoing e-mail account name	

Setting User E-Mail Size

Action	Level	Log
Setting up E-Mail Quotas	Important	[config] user_mail_limit (uid:**, user_limit:**, retrieve_limit:**, send_limit:**)

Properties	Meaning	Remarks
retrieve_limit	Incoming e-mail quotas	If unlimited, -1 is written.
send_limit	Outgoing e-mail quotas	If unlimited, -1 is written.
uid	User ID of the user who has been set	
user_limit	Total size of e-mails that one user can save	If unlimited, -1 is written.

Restricting E-Mail Size

Action	Level	Log
Setting up E-Mail Quotas	Important	[config] mail_limit (user_limit:**, retrieve_limit:**, send_limit:**)

Properties	Meaning	Remarks
retrieve_limit	Incoming e-mail quotas	If unlimited, -1 is written.
send_limit	Outgoing e-mail quotas	If unlimited, -1 is written.
user_limit	Total size of e-mails that one user can save	If unlimited, -1 is written.

OAuth Client Settings

The setting for the OAuth client is available in Garoon version 5.5.1 or later.

Action	Level	log
Add OAuth client	Important	[create] oauth_client(id:*, display_name:'**', provider_name:'**', client_id:'**', oauth_client_code:'**')
Edit OAuth client	Important	[modify] oauth_client(id:*, display_name:'**', provider_name:'**', client_id:'**', oauth_client_code:'**')
Delete OAuth client	Important	[delete] oauth_client(id:*, display_name:'**', provider_name:'**', client_id:'**', oauth_client_code:'**')

Properties	Meaning	Remarks
client_id	Client ID	
display_name OAuth	Display name of the client	

Properties	Meaning	Remarks
id	Setting ID of your OAuth client	It is an ID automatically configured by Garoon.
oauth_client_code	OAuth client code	It is a code automatically configured by Garoon.
provider_name	Provider	One of the following values is displayed: • Google • Microsoft

Import from CSV File

Action	Level	Log
Import e-mail server	Important	[import] server (server_id:**, foreign_key:**)
Import e-mail account	Important	[import] account (account_id:**)

Properties	Meaning	Remarks
account_id	Account ID	
foreign_key	Mail server code	
server_id	Mail server ID	

Export to CSV File

Action	Level	Log
Export e-mail server	Important	[export] server (server_id:**, foreign_key:**)
Export user account	Important	[export] account (account_id:**)

Properties	Meaning	Remarks
account_id	Account ID	
foreign_key	Mail server code	
server_id	Mail server ID	

JavaScript and CSS Customization

JavaScript and CSS Customization function is available in Garoon version 5.5.0 or later.

Action	Level	Log
Add customization group	Important	[add] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Edit customization group	Important	[modify] customization_group (id:*, name:'**', apply_status:'**', rid_1:*, oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)
Delete customization group	Important	[delete] customization_group (id:*, name:'**', apply_status:'**', rid_1:*,oid_1:*, uid_1:*, js_1:'**', ... , css_1:'**'...)

Properties	Meaning	Remarks
apply_status	JavaScript and CSS customization	One of the following values is displayed: • applied (apply) • not applied (do not apply)
css_[integer starting from 1]	Files and links to be applied in CSS customization	
id	Customization group ID	
js_[integer starting from 1]	Files and links to be applied in the	

Properties	Meaning	Remarks
	JavaScript customization	
name	Customization group name	
oid	Organization ID	
rid	Role ID	
uid	User ID	

Personal Settings

E-Mail Account Settings

Action	Level	Log
Create e-mail account	Important	[create] account (account_id:**, account_code:'**', account_name:'**', mail_server:**, email:'**', retrieve_account:'**', retrieve_save:'**', disabled:**)
Change e-mail account	Important	[modify] account (account_id:**, account_code:'**', account_name:'**', mail_server:**, email:'**', retrieve_account:'**', retrieve_save:'**', disabled:**)
Delete e-mail account	Important	[delete] account (account_id:**, account_code:'**', account_name:'**', mail_server:**, email:'**', retrieve_account:'**', retrieve_save:'**', disabled:**)
Delete e-mail accounts (deleting also e-mail data)	Important	[delete] mail (mid:**, account_id:**, subject:'**', to:'**')

Properties	Meaning	Remarks
account	E-mail account	One of the following values is displayed: • all (all accounts)

Properties	Meaning	Remarks
		• Selected e-mail account
account_code	User account code	
account_id	Account ID	
account_name	User account name	
disabled	Status	One of the following values is displayed: • 0 • 1
email	E-mail address	
mail_server	Mail Servers	
mid	E-mail ID	
retrieve_account	Incoming e-mail account name	
retrieve_save	Leave E-mail on incoming mail server	One of the following values is displayed: • LEAVE • DELETE
smtp_account	Outgoing e-mail account name	
subject	Subject	
to	Recipients	

Read Receipt Settings

Action	Level	Log
Read Receipt Settings	Important	[config] confirm (use_for_sending:**, response:**, no_response_bcc:**)

Properties	Meaning	Remarks
no_response_bcc	Do not respond when not included in To or Cc.	One of the following values is displayed: • 0 • 1
response	Reply to requests for read receipts	Displays one of the following values: • ignore • manual • auto
use_for_sending	Display the "Request Receipt" button on the "E-mail" screen	One of the following values is displayed: • 0 • 1

Importing Data

Action	Level	Log
Import from CSV File	Important	[import] mail (account:**, folder:**)

Properties	Meaning	Remarks
account	E-mail account	
folder	Folder names	

Exporting Data

Action	Level	Log
Export to CSV File	Important	[export] mail (account:**, folder:**)

Properties	Meaning	Remarks
account	E-mail account	
folder	Folder names	

Deleting Data

Action	Level	Log
Delete e-mails in bulk	Important	[delete_all] mail (account:**, year:**, month:**, day:**)

Properties	Meaning	Remarks
day	Day	
month	Month	
year	Years	

User Actions

Action	Level	Log
Add folder	Important	[create] folder (account_id:**, folder_id:**, folder_name:**, parent_folder_id:**, memo:**)
Edit folder	Important	[modify] folder (account_id:**, folder_id:**, folder_name:**, parent_folder_id:**, memo:**)
Move folder	Important	[move] folder (account_id:**, folder_id:**, folder_name:**, parent_folder_id:**, list_index:**)
Delete folder	Important	[delete] folder (account_id:**, folder_id:**, folder_name:**)
Send e-mails	Important	[send] mail (mid:**, subject:**, data:**,filename_1:**, to:**, cc:**, bcc:**)

Action	Level	Log
Receive e-mails (Receive manually, Receive automatically)	Important	[receive] mail (mid:**, subject:**, from:**, data:**, filename_1:**)
Move E-mails	Important	[move] mail (mid:**, account_id:**, folder_id:**, source_folder_id:**)
Delete e-mails	Important	[delete] mail (mid:**, account_id:**, subject:**,to:**)

Properties	Meaning	Remarks
account_id	Account ID	
data	Contents	Up to 100 characters are output.
filename_[integer starting from 1]	Attachment file name	Up to 100 characters are output.
folder_id	Folder ID	
from	From	
mid	E-mail ID	
source_folder_id	Source folder ID	
subject	Subject	Up to 100 characters are output.
to	Recipients	

1.10.19. Logs of Cybozu Online Service

General Settings

Action	Level	log
Sending individual IDS	Important	[config] common (use_product_id:**)

Properties	Meaning	Remarks
use_product_id	Sending an individual ID to the Web site.	One of the following values is displayed: • 0 • 1

Service List

Action	Level	log
Using the service	Important	[config] service (sid:**, name:**, activate:**)

Properties	Meaning	Remarks
activate	Enable	
name	Service	
sid	Service ID	

Receiving Event Data

Action	Level	log
Receiving Event Data	Important	[download] event_data (sid:**, name:**)

Properties	Meaning	Remarks
name	Service	
sid	Service ID	

Error

Action	Level	log
Errors in event data parsing	Important	parse_error (sid:**, name:**, cache_file:**)
Receiving an error in the event data	Important	connection_error (sid:**, name:**, url:**)

Properties	Meaning	Remarks
cache_file	Cache file Path	
name	Service	
sid	Service ID	
url	Incoming URL	

1.10.20. Presence Acknowledgment Logs

System Administration

General Settings

Action	Level	log
• Auto-setting of status • Allow users to set proxy settings	Important	[config] common (personal_proxy_setting:'**') [config] common (auto_set_presence:'**', auto_set_absence:'**')

Properties	Meaning	Remarks
auto_set_absence	Auto-setting	One of the following values is displayed: • ON

Properties	Meaning	Remarks
		• OFF
auto_set_presence	Automatic setting of "presence"	One of the following values is displayed: • ON • OFF
personal_proxy_setting	Allow proxy settings	One of the following values is displayed: • ON • OFF

Setting Statuses

Action	Level	log
Setting Statuses	Important	[config] system_presence (value:'**')

Properties	Meaning	Remarks
value	Available Values	

Setting up Proxies

Action	Level	log
Adding a delegate	Important	[add] agent_modify (uid/oid:**, agent_uid:**, agent_oid:**)
Deleting delegates in bulk	Important	[delete] agent_modify (uid/oid:**, agent_uid:**, agent_oid:**)
Delete all delegates	Important	[delete_all] agent_modify (uid/oid:**)

Properties	Meaning	Remarks
agent_oid	Proxy Organization ID	
agent_uid	Delegate User ID	
oid	Organization ID	
uid	User ID	

Importing Proxies

Action	Level	Log
Import from CSV File	Important	[import]agent_modify

Exporting Proxies

Action	Level	Log
Export to CSV File	Important	[export]agent_modify

Personal Settings

Action	Level	log
Setting Statuses	Important	[config] personal_presence (value:'**')
Setting up Proxies	Important	[add] agent_modify (uid:*, agent_uid:*, agent_oid:*)

Properties	Meaning	Remarks
agent_oid	Proxy Organization ID	
agent_uid	Delegate User ID	

Properties	Meaning	Remarks
uid	User ID	
value	Available Values	

User Actions

Action	Level	log
Changing the status	Important	[modify] presence information (mid:**, uid:**, info:**)

Properties	Meaning	Remarks
info	Notes on presence information	
mid	Delegate User ID	
uid	User ID	

1.10.21. Logs of Favorites

General Settings

Action	Level	log
Favorite Upper Limit	Important	[config] common (star_limit:**)

Properties	Meaning	Remarks
star_limit	Available Values	

1.10.22. Notifications List Logs

System Administration

Settings for External Notifications through API / E-Mail

Action	Level	log
Adding external notifications	Important	[create] system_notifyinfo (aid:**, code:**, name:**)
Changing external notifications	Important	[modify] system_notifyinfo (aid:**, code:**, name:**)
Delete external Notifications	Important	[delete] system_notifyinfo (aid:**)

Properties	Meaning	Remarks
aid	External notification ID	
code	External notification code	
name	External notification display Name	

Personal Settings

Using External Notifications

Action	Level	log
Stop using external notifications	Important	[config] personal_notify_set (not_use:**)

Properties	Meaning	Remarks
not_use	Do not use external notifications	One of the following values is displayed: • True (not available) • false（利用する）

User Actions

Action	Level	log
Creating external notifications in APIS	Important	[create] items (app:'**', 'notificationKey': '**', title: '**') by REST API

Properties	Meaning	Remarks
app	External notification code	
notificationKey	Identification (ID) of notifications	
title	Subject	

1.10.23. Workflow Logs

This section describes workflow logs.

References

- Logs of General Settings for Workflow(478Page)
- Logs of Request Form List(481Page)
- Logs of Request Form Information(483Page)
- Logs of Request Form Items(485Page)
- Logs of Permissions for Request Form Items(494Page)
- Logs of Auto Add to Scheduler(495Page)
- Logs of Application Routes(498Page)
- Logs of Route Steps(499Page)
- Logs of Route Branching(501Page)
- Logs of Route List(503Page)
- Logs of Access Permissions for Workflows(506Page)
- Logs of Operational Administrative Privileges for Workflows(507Page)
- Logs of Managing Request Data(508Page)
- Logs of CSV File Operations for Workflows(509Page)
- Logs of Creating Requests(512Page)
- Logs of Processing Requests(513Page)
- Logs of Proxy Settings(515Page)
- Logs of Request Visibility(516Page)
- Logs of Workflow Portlet Configuration(517Page)

1.10.23.1. Logs of General Settings for Workflow

Action	Level	log
• Request & approval number annual changeover • Permission to use progress • Allow the applicant to reroute • Allow operational administrators to reroute • Allow system administrators to change route	Important	[config] common_set（cutover:**, allow_remand:**, applicant:**, operation_admin:**, system_admin:**, approval_plan:**, substitute_application:**, substitute_approval:**, personal_agent_setting:**, mail_notification:**, mail_notification_url:**, js_css_customization_setting:'**')

Action	Level	log
• Permission to use the appointment • Allow Proxy requests • Allow proxy approval • Allow users to set proxy settings • E-mail notifications permission • Character encoding for automatic export • Allow JavaScript and CSS customization		

Properties	Meaning	Remarks
allow_remand	Permission to use progress	One of the following values is displayed: • on • off
applicant	Allow the applicant to reroute	One of the following values is displayed: • on • off
approval_plan	Permission to use the appointment	One of the following values is displayed: • on • off
cutover	The annual changeover date of the request/ approval number	
js_css_customization_setting	Allow JavaScript and CSS customization	One of the following values is displayed: • on (Allow) • off (Do not allow)
mail_notification	E-mail notifications	

Properties	Meaning	Remarks
mail_notification_url	URL of e-mail notification recipients	
operation_admin	Allow operational administrators to reroute	One of the following values is displayed: • on • off
personal_agent_setting	Allow personal proxy settings	One of the following values is displayed: • on • off
substitute_application	Allow Proxy requests	One of the following values is displayed: • on • off
substitute_approval	Allow proxy approval	One of the following values is displayed: • on • off
system_admin	Allow system administrators to change route	One of the following values is displayed: • on • off

1.10.23.2. Logs of Request Form List

Action	Level	Log
Adding Categories	Important	[create] category_add (cid:**, name:**, foreign_key:**, memo:**)
Change categories	Important	[modify] category_modify (cid:**, name:**, foreign_key:**, memo:**)
Move categories	Important	[modify] category_move (cid:**, s_cid:**)
Delete categories	Important	[delete] category_delete (cid:**)
Reorder subcategories	Important	[modify] category_order (cids_1:**)
Add Request Form	Important	[create] form_add (cid:**, fid:**, name:**, foreign_key:**, memo:**)
Copying Request Forms	Important	[create] form_copy (fids_1:**)
Deleting a request form in bulk	Important	[delete] form_delete_multi (fids_1:**)
Delete all Forms	Important	[delete] form_delete_all (cid:**)
Import XML from a request form	Important	[import] form_import (forms_1:**, items_1:**, paths_1:**, path_steps_1:**, path_skips_1:**, path_conditions_1:**)
Export a request form to XML	Important	[export] form_export
Adding a separator line	Important	[create] form_separator_add (cid:**, fid:**)
Reorder request form or separator lines	Important	[modify] form_order (cid:**, fids_1:**)

Properties	Meaning	Remarks
cid	Category ID	
Integers starting with Cids_	Category ID	
fid	Request form ID	
Integers starting with Fids_	Request form ID	
foreign_key	Category Code Request Form Code	
Integers starting with Forms_	Request Form FOREIGN key	
Integers starting with Items_	Request Item FOREIGN Key	
memo	Memo	
name	Category names Form name	
Integers starting with Path_conditions_	Route branching condition Name	
Integers starting with Path_skips_	Branching item ID for route	
Integers starting with Path_steps_	Step FOREIGN Key	
Integers starting with Paths_	Route FOREIGN Key	
s_cid	Parent category ID	

1.10.23.3. Logs of Request Form Information

Action	Level	log
Changing the Notes for administrators	Important	[modify] form_memo_modify (fid:**, admin_memo:**)
Changing request form Information	Important	[modify] form_modify (fid:**, name:**, foreign_key:**, memo:**, auto_export:**, export_folder:**)
Moving Request Forms	Important	[modify] form_move (cid:**, s_cid:**, fid:**)
Enable/Disable Request form	Important	[modify] form_activate (fid:**, active:**)
Deleting a request form	Important	[delete] form_delete (fid:**)
Icon Settings	Important	[modify] form_icon_modify (icon_id:**, icon_type:**, icon_url:**)
Request Number Settings	Important	[modify] form_serial_modify (fid:**, serial_type:**, serial_format:**)
Request Number Initialization	Important	[modify] form_serial_initialize (fid:**, serial_number:**)
Approval number settings	Important	[modify]form_serial_modify(fid:**, serial_type:**, serial_format:**, approved_serial_type:**, approved_serial_format:**)
Change the initial approval number.	Important	[modify]form_approved_serial_initialize(fid:**, approved_serial_number:**)
Changing the JavaScript and CSS customization	Important	[modify] customization (fid:**, apply_status:'**', js_1:'**', css_1;'**')

Properties	Meaning	Remarks
active	Enable/Disable the Request form flag	One of the following values is displayed: • active

Properties	Meaning	Remarks
		• deactive
admin_memo	Notes for Administrators	
apply_status	JavaScript and CSS customization	One of the following values is displayed: • applied (apply) • Not applied (do not apply)
approved_serial_format	Approval number format	
approved_serial_type	Approval numbering	One of the following values is displayed: • every • not use
cid	Category ID	
Integers starting with Cids_	Category ID	
Integers starting with Css_	Files and links to be applied in CSS customization	
fid	Request form ID	
foreign_key	Request Form Code	
icon_id	Icon ID	
icon_type	Icon Type	Displays one of the following values: • standard • embedded • url
icon_url	Specified URL	

Properties	Meaning	Remarks
Integers starting with Js_	Files and links to be applied in the JavaScript customization	
memo	Description	
name	Request Form Name	
s_cid	Parent category ID	
serial_format	Request number format	
serial_number	New request Number	
serial_type	Request numbering	Displays one of the following values: • all • every • not_use

1.10.23.4. Logs of Request Form Items

Action	Level	log
Adding a string (one line) item	Important	[create] form_layout_string_single_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, size:**, max_input_size:**, input_chars:**,

Action	Level	log
		initial_type:**, initial_text_value:**, initial_user_value:**, required:**)
Changing a string (one line) item	Important	[modify] form_layout_string_single_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, size:**, max_input_size:**, input_chars:**, initial_type:**, initial_text_value:**, initial_user_value:**, required:**)
Adding a String (multiline) item	Important	[create] form_layout_string_multiple_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, col_size:**, row_size:**, initial_value:**, required:**)
Changing text (Multiline) fields	Important	[modify] form_layout_string_multiple_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, col_size:**, row_size:**, initial_value:**, required:**)
Adding a menu item	Important	[create] form_layout_menu_string_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, menu_items:'**... ', initial_value:**, menu_item_type:**, required:**)
Changing a menu item	Important	[modify] form_layout_menu_string_modify (iid:**, foreign_key:**, display_name:**,code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, menu_items:'** ... ', initial_value:**, menu_item_type:**, required:**)
Adding radio button fields	Important	[create] form_layout_radio_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**,

Action	Level	log
		description_editor:**, description:**, description_type:**, radio_items:'** ...', initial_value:**, required:**)
Changing radio button fields	Important	[modify] form_layout_radio_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, radio_items:'** ...', initial_value:**, required:**)
Adding check box fields	Important	[create] form_layout_checkbox_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_value:**)
Changing check box fields	Important	[modify] form_layout_checkbox_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_value:**)
Adding numeric fields	Important	[create] form_layout_numeric_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, input_numbers:**, initial_value:**, effective_figures:**, minus_type:**, right_align:**, split_rank:**, max_input_number:**, min_input_number:**, required:**)
Changing numeric fields	Important	[modify] form_layout_numeric_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, input_numbers:**, initial_value:**, effective_figures:**, minus_type:**, right_align:**, split_rank:**, max_input_number:**, min_input_number:**, required:**)

Action	Level	log
Adding auto-calculated fields	Important	[create] form_layout_calc_numeric_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, effective_figures:**, minus_type:**, right_align:**, split_rank:**, not_display:**, calc_type:**, calc_operator_operator:**, calc_operator_operand1_type:**, calc_operator_operand1_value:**, calc_operator_operand2_type:**, calc_operator_operand2_value:**, calc_total_values:**)
Changing auto-calculated fields	Important	[modify] form_layout_calc_numeric_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, effective_figures:**, minus_type:**, right_align:**, split_rank:**, not_display:**, calc_type:**, calc_operator_operator:**, calc_operator_operand1_type:**, calc_operator_operand1_value:**, calc_operator_operand2_type:**, calc_operator_operand2_value:**, calc_total_values:**)
Adding a Date field	Important	[create] form_layout_date_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, date_type:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_type:**, initial_year:**, initial_month:**, initial_day:**, initial_hour:**, initial_minute:**, required:**)
Changing date fields	Important	[modify] form_layout_date_modify (iid:**, foreign_key:**, display_name:**, code:**, date_type:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_type:**, initial_year:**, initial_month:**, initial_day:**, initial_hour:**, initial_minute:**, required:**)

Action	Level	log
Adding a file attachment	Important	[create] form_layout_file_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, max_files:**, inline:**, thumbnail:**,thumbnail_xsize:**, thumbnail_ysize:**, required:**)
Changing file attachments	Important	[modify] form_layout_file_modify (iid:**, foreign_key:**, display_name:**, code:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, max_files:**, inline:**, thumbnail:**, thumbnail_xsize:**, thumbnail_ysize:**, required:**)
Route navigation related item added	Important	[create] form_layout_route_search_add (fid:**, iid:**, foreign_key:**, display_name:**, code:**, search_type:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, reauired:**)
Change the route navigation related item	Important	[modify] form_layout_route_search_modify (iid:**, foreign_key:**, display_name:**, code:**, search_type:**, br:**, separator:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, reauired:**)
Add item for customization	Important	[create] form_layout_js_customize_add (fid:**, iid:**, foreign_key:'**', code:'**', br:'**')
Edit item for customization	Important	[modify] form_layout_js_customize_add (iid:**, foreign_key:'**', code:'**', br:'**')
Delete item for customization	Important	[delete] form_layout_js_customize_add (iid:**)
Adding Empty Lines	Important	[create] formlayout_blank_add (fid:**, iid:**)
Delete Item	Important	[delete] form_layout_delete (iid:**)

Action	Level	log
Deleting items in bulk	Important	[delete] form_layout_delete_multi (iids_1:**)
Delete all items	Important	[delete] form_layout_delete_all (fid:**)
Copying Items	Important	[create] form_layout_copy (fid:**, iids_1:**)
Reorder Items	Important	[modify] formlayout_order (fid:**, iids_1:**)

Properties	Meaning	Remarks
br	To the right	One of the following values is displayed: • right_position • not_right_position
calc_operator_operand1_type	Item 1	
calc_operator_operand1_value	Constant One	
calc_operator_operand2_type	Item 2	
calc_operator_operand2_value	Constant 2	
calc_operator_operator	Operator	Displays one of the following values: • plus • minus • multiplication • division
calc_total_values	The sum of the values of the choices	
calc_type	Calculation details	One of the following values is displayed: • operation • total
code	Item code	

Properties	Meaning	Remarks
col_size	Digits	
date_type	Date format	One of the following values is displayed: • Date only • Date_time (date and time)
description	Description	
description_editor	Description format	One of the following values is displayed: • text • edit
description_type	Explanation icon	One of the following values is displayed: • icon • not_icon
display_name	Item name	
effective_figures	Decimal places	
fid	Request form ID	
foreign_key	FOREIGN key	
iid	New request Number	
Integers starting with Iids_	Item ID	
initial_day	Day	
initial_hour	When	When "format" is "Date and time".
initial_minute	Minutes	"Date and Time" is "minute".
initial_month	Month	
initial_text_value	Default value for direct input	

Properties	Meaning	Remarks
initial_type	Initial value of "string (one line)" Field	One of the following values is displayed: • manual_input • user_info
initial_type	Default value of "Date" field	Displays one of the following values: • now_date • specific_date • blank_date
initial_user_value	User profile	
initial_value	Default value of "check box" field	One of the following values is displayed: • checked • not_checked
initial_year	Years	
inline	View Files	One of the following values is displayed: • inline • not_inline
input_chars	Limits	Displays one of the following values: • full • half • no_limit
input_numbers	Limitation on input	One of the following values is displayed: • limit • no_limit
max_files	Maximum number of files	
max_input_number	Maximum Value	

Properties	Meaning	Remarks
max_input_size	Maximum number of characters	
menu_item_type	Type of menu item	One of the following values is displayed: • 1 • 0
Integers starting with Menu_items_	Contents of Menu	
min_input_number	Minimum value	
minus_type	The way to show negative numbers	
not_display	Calculation results	One of the following values is displayed: • display • not_display
option_string	Text to be placed before or after	
option_string_type	Character placement before or after	
Integers starting with Psids_	Route Step ID	
Integers starting with Radio_items_	Contents of Radio Items	
required	Required input	One of the following values is displayed: • required • not_required
right_align	Justified	One of the following values is displayed: • right_align • not_right_align

Properties	Meaning	Remarks
row_size	Row	
search_type	Items to import	Displays one of the following values: • route/fare • route • fare
separator	Separator	
size	Input width	
split_rank	Thousands-delimited view	One of the following values is displayed: • split_rank • not_split_rank
thumbnail	Thumbnail images	One of the following values is displayed: • thumbnail • not_thumbnail
thumbnail_xsize	Width	
thumbnail_ysize	Height	

1.10.23.5. Logs of Permissions for Request Form Items

Action	Level	log
Changing user rights for an item	Important	[modify] item_access_modify (fid:**, iid:**, psid:**, view:**, edit:**)

Properties	Meaning	Remarks
fid	Request form ID	
iid	Item ID	
psid	Route Step ID	
psid	Right of view	One of the following values is displayed: • on • off
edit	Editing right	One of the following values is displayed: • on • off

1.10.23.6. Logs of Auto Add to Scheduler

Action	Level	log
Set auto add to Scheduler	Important	[config] schedule cooperation (use:'**', fid:**, event_type:'**', menu_title:'**', start_iid:**, start_display_name:'**', end_iid:**, end_display_name:'**')
Auto add an appointment	Important	[cooperation] schedule_info (pid:**, fid:**, subject:'**', applicant_user_name:'**', approval_user_name:'**', event_type:'**', menu_title:'**', start_year:**, start_month:**, start_day:** , start_hour:**, start_minute:**, end_year:**, end_month:**, end_day:**, end_hour:**, end_minute:**, timezone:'**')

Properties	Meaning	Remarks
applicant_user_name	Applicant User Name	Outputs the user name of the original applicant, even when a proxy applicant requested.
approval_user_name	Approver User Name	Outputs the user name of the original approver, even when a proxy approver approved.
end_day	Appointment end day	
end_display_name	End date and time item name	
end_hour	End time of an appointment	Outputs the time only when the time is set.
end_iid	End date and time item ID	
end_minute	End Time (min) of an appointment	Outputs the time only when the time is set.
end_month	Appointment end month	
end_year	Appointment end year	
event_type	Period	
fid	Request form ID	
menu_title	Appointment type	
pid	Request ID	
start_day	Appointment start day	
start_display_name	Start date and time item name	

Properties	Meaning	Remarks
start_hour	Start time of the appointment	Outputs the time only when the time is set.
start_iid	Start date and time item ID	
start_minute	Start time of the appointment	Outputs the time only when the time is set.
start_month	Appointment start month	
start_year	Appointment start year	
subject	Request subject	
timezone	Time zone of appointment date and time	
use	Auto add to Scheduler	One of the following values is displayed: • on • off

1.10.23.7. Logs of Application Routes

Action	Level	log
Adding route information	Important	[create] path_add (fid:**, pid:**, name:**, type:**, foreign_key:**, richeditor:**, description:**, icon:**)
Changing route information	Important	[modify] path_modify (pid:**, name:**, type:**, foreign_key:**, richeditor:**, description:**, icon:**)
Setting up shared routes	Important	[modify] path_select (fid:**, pid:**)
Shared private route	Important	[modify] path_publish (pid:**, type:**)

Properties	Meaning	Remarks
description	Description	
fid	Request form ID	
foreign_key	Route code	
icon	Explanation icon	One of the following values is displayed: • icon • not_icon
name	Route Name	
pid	Route ID	
richeditor	Description format	One of the following values is displayed: • text • edit

Properties	Meaning	Remarks
type	Route type	

1.10.23.8. Logs of Route Steps

Action	Level	log
Adding a route step	Important	[create] path_step_add (pid:**, psid:**, role:'**', code:'**', type:'**', acceptance_type:'**', change_path:'**')
Changing Route steps	Important	[modify] path_step_modify (psid:**, role:'**', code:'**', path:**, type:'**', acceptance_type:'**', change_path:'**')
Reorder Route Steps	Important	[modify] path_step_order (pid:**, psids_1:**)
Deleting route steps	Important	[delete] path_step_delete (psid:**)
Deleting route steps in bulk	Important	[delete] path_step_delete_multi (psids_1:**)
Add default watchers	Important	[create] default_add (psid:**, uids_1:**, gids_1:**, srids_1:**, skip:'**', applicant:'**')
Choice of Superior	Important	[modify] default_chief_set (rid:**, psid:**, chief:'**')
Set the default value (omitted)	Important	[modify] default_skip_set (psid:**)
Delete default watchers	Important	[delete] default_delete_multi (psid:**, uids_1:**, gids_1:**, srids_1:**, skip:'**', applicant:'**')
Delete all of the default values	Important	[delete] default_delete_all (psid:**)
Allow setting for default change	Important	[modify] default_change_path (psid:**, change_path:'**')

Properties	Meaning	Remarks
acceptance_type	Type of Approval route	One of the following values is displayed: • and • or
applicant	Applicant Flag	One of the following values is displayed: • applicant • not_applicant
change_path	Allow Route change	One of the following values is displayed: • permission • not_permission
change_path	Allow default change	One of the following values is displayed: • allow • deny
chief	Superior Select Flag	One of the following values is displayed: • chief • not_chief
code	Step code	
Integers starting with Gids_	Group ID	
path	Route ID	
pid	Route ID	
psid	Route Step ID	
Integers starting with Psids_	Route Step ID	
role	Route Step Name	
skip	Omit settings	One of the following values is displayed: • skip • not_skip

Properties	Meaning	Remarks
Integers starting with Srids_	Static Role ID	
type	Route type	One of the following values is displayed: • approval • circular
Integers starting with Uids_	User ID	

1.10.23.9. Logs of Route Branching

Action	Level	log
Adding route branching information	Important	[create] path_skip_set (fid:**, sid:**, iid:**)
Deleting route branching conditions	Important	[delete] path_skip_delete (sid:**)
Adding route branching conditions	Important	[create] path_condition_add (sid:**, pcid:**, name:**, number:**, operator:**, option:**, path_skip:**)
Changing route branching conditions	Important	[modify] path_condition_modify (pcid:**, name:**, number:**, operator:**, option:**, path_skip:**)
Reorder Route branching conditions	Important	[modify] path_condition_order (sid:**, pcids:**)
Deleting route branching conditions	Important	[delete] path_condition_delete (pcid:**)
Deleting route branching conditions in bulk	Important	[delete] path_condition_delete_multi (pcids:**)

Properties	Meaning	Remarks
fid	Request form ID	
iid	Item ID	
name	Condition name for route branching	
number	Numeric branching conditions	
operator	Branching conditions	
option	Branching conditions for radio buttons	
path_skip	Route step ID to be skipped	
pcid	Route branching Condition ID	
Integers starting with Pcids_	Route branching Condition ID	
sid	Route branching Information ID	

1.10.23.10. Logs of Route List

Action	Level	log
Adding shared route information	Important	[create] path_add (fid:**, pid:**, name:**, type:**, foreign_key:**, richeditor:**, description:**, icon:**)
Changing shared route Information	Important	[modify] path_modify (pid:**, name:**, type:**, foreign_key:**, richeditor:**, description:**, icon:**)
Deleting shared route information	Important	[delete] path_delete (pid:**)
Deleting shared route information in bulk	Important	[delete] path_delete_multi (pids_1:**)
Changing the Administrator notes	Important	[modify] admin_memo_modify (pid:**, admin_memo:**)
Adding a route step	Important	[create] path_step_add (pid:**, psid:**, role:'**', code:'**', type:'**', acceptance_type:'**', change_path:'**')
Changing Route steps	Important	[modify] path_step_modify (psid:**, role:'**', code:'**', path:**, type:'**', acceptance_type:'**', change_path:'**')
Deleting route steps	Important	[delete] path_step_delete (psid:**)
Deleting route steps in bulk	Important	[delete] path_step_delete_multi (psids_1:**)
Reorder Route Steps	Important	[modify] path_step_order (pid:**, psids_1:**)
Add default watchers	Important	[create] default_add (psid:**, uids_1:**, gids_1:**, srids_1:**, skip:**, applicant:**)
Choice of Superior	Important	[modify] default_chief_set (rid:**, psid:**, chief:**)
Set the default value (omitted)	Important	[modify] default_skip_set (psid:**)
Delete default watchers	Important	[delete] default_delete_multi (psid:**, uids_1:**, gids_1:**, srids_1:**, skip:**, applicant:**)
Delete all of the default values	Important	[delete] default_delete_all (psid:**)

Action	Level	log
Allow setting for default change	Important	[modify] default_change_path (psid:**, change_path:**)
Shared private route	Important	[modify] path_publish (pid:**, type:**)
Adding a separator line	Important	[create] path_separator_add (pid:**)
Reorder Route or separator lines	Important	[modify] path_order (pids_1:**)
Import from XML file	Important	[import] path_import (pids_1:**, psids_1:**, uids_1:**, gids_1:**, srids_1:**, crids_1:**, skips:**, applicants:**)
Export to XML file	Important	[export] path_export

Properties	Meaning	Remarks
acceptance_type	Type of Approval route	One of the following values is displayed: • and • or
admin_memo	Notes for Administrators	
applicant	Applicant Flag	One of the following values is displayed: • applicant • not_applicant
change_path	Allow Route change	One of the following values is displayed: • permission • not_permission
change_path	Allow default change	One of the following values is displayed: • allow • deny
chief	Superior Select Flag	One of the following values is displayed: • chief

Properties	Meaning	Remarks
		• not_chief
Integers starting with Cirds_	Superior Role ID	
code	Step code	
description	Description	
fid	Request form ID	
foreign_key	Route code	
Integers starting with Gids_	Group ID	
icon	Explanation icon	One of the following values is displayed: • icon • not_icon
name	Route Name	
path	Route ID	
pid	Route ID	
psid	Route Step ID	
richeditor	Description format	One of the following values is displayed: • text • edit
role	Route Step Name	
skip	Omit settings	One of the following values is displayed: • skip • not_skip
Integers starting with Srids_	Static Role ID	
type	Route type	One of the following values is displayed:

Properties	Meaning	Remarks
		• publish • monopoly
type	Route type	One of the following values is displayed: • approval • circular
Integers starting with Uids_	User ID	

1.10.23.11. Logs of Access Permissions for Workflows

Action	Level	log
Add new entry	Important	[create] access_add (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**, security_model:'**', authority:'**')
Delete user rights	Important	[delete] access_delete_multi (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete all permissions	Important	[delete] access_delete_all (cid:**)
Change security model	Important	[modify] access_model_modify (cid:**, security_model:'**')

Properties	Meaning	Remarks
authority	Permissions	One of the following values is displayed: • on • off
cid	Category ID	

Properties	Meaning	Remarks
Integers starting with Drids_	Dynamic Role ID	
Integers starting with Gids_	Group ID	
security_model	Security model	One of the following values is displayed: • grant • revoke
Integers starting with Srids_	Static Role ID	
Integers starting with Uids_	User ID	

1.10.23.12. Logs of Operational Administrative Privileges for Workflows

Action	Level	Log
Adding operational administrative privileges	Important	[create] privilege_add (uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete Operational administrative privileges in bulk	Important	[delete] privilege_delete_multi (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete all operational administrative privileges	Important	[delete] privilege_delete_all (cid:**)

Properties	Meaning	Remarks
cid	Category ID	
Integers starting with Drids_	Dynamic Role ID	
Integers starting with Gids_	Group ID	

Properties	Meaning	Remarks
Integers starting with Srids_	Static Role ID	
Integers starting with Uids_	User ID	

1.10.23.13. Logs of Managing Request Data

Action	Level	log
Delete request data	Important	[delete] petition_delete (pid:**)
Deleting request data in bulk	Important	[delete] petition_delete_multi (pids_1:**)
Delete all request data	Important	[delete] petition_delete_all (fid:**)
Print request data	Important	[print] petition_print
Changing the processor for a route step	Important	[modify] petition_path_step_modify (add_uids_1:**, deleted_uids_1:**, comment:'**')
Export to CSV file	Important	[export] petition_export

Properties	Meaning	Remarks
Integers starting with Add_uids_	Additional User ID	
comment	Comment	
Integers starting with Deleted_uids_	Delete User ID	
fid	Request form ID	
pid	Request ID	

Properties	Meaning	Remarks
Integers starting with Pids_	Request ID	
Integers starting with Uids_	User ID	

1.10.23.14. Logs of CSV File Operations for Workflows

Action	Level	log
Import categories	Important	[import] category_import (parent_foreign_key_1:**, foreign_key_1:**, name_1:**,memo_1:**)
Export categories	Important	[export] category_export
Import category Name	Important	[import] category_local (cid:**, language_code:'**', prev_category_name:'**', next_category_name:'**')
Export category names	Important	[export] category_local (cid:**, languageCode:'**', category_name:'**')
Importing User Rights	Important	[import] category_accesses_import (foreign_key_1:**, item_1:**, value_1:**,name_1:**)
Exporting User Rights	Important	[export] category_accesses_export
Import operational administrative privileges[1]	Important	[create] privilege_add (uids_1:'**', gids_1:'**', srids_1:'**', drids_1:'**') [import] privilege
Export operational administrative privileges[1]	Important	[export] privilege
Import Proxy Applicant	Important	[import] agent_petition_import (foreign_key_1:'**', agent_1:'**')

Action	Level	log
Export Proxy Applicant	Important	[export] agent_petition_export
Import Proxy Approver	Important	[import] agent_approval_import (foreign_key_1:'**', agent_1:'**')
Export Proxy Approver	Important	[export] agent_approval_export

[1]: Available in Garoon version 5.9.0 or later.

Properties	Meaning	Remarks
Integers starting with Agent_	Proxy Applicant Login Name Proxy Approver Login Name	
category_name	Category names	
cid	Category ID	
Integers starting with Drids_	Dynamic Role ID	
foreign_key	Category key	
Integers starting with Foreign_key_	Login name	
Integers starting with Gids_	Group ID	
item	Role	
languageCode	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
language_code	Language code	Displays one of the following values:

Properties	Meaning	Remarks
		• ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
memo	Memo	
name	Category names	
name	Role name	
next_category_name	Category name after the change	
Integers starting with Srids_	Static Role ID	
parent_foreign_key	Parent category Key	
prev_category_name	Original category names	
uids_[integer starting from 1]	User ID	
value	Security model	

1.10.23.15. Logs of Creating Requests

Action	Level	log
Create requests	Important	[create] petition_add (pid:**, fid:**, name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')
Save request as draft	Important	[create] petition_draft_add (pid:**, fid:**, name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')
Reusing requests	Important	[create] petition_reuse (pid:**, fid:**, name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')
Save a reused request as a draft	Important	[create] petition_reuse_draft (pid:**, fid:**,name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')
Draft requests	Important	[modify] petition_draft (pid:**, fid:**, name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')
Editing drafts	Important	[modify] petition_draft_draft (pid:**, fid:**, name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')
Request again	Important	[modify] remand_petition (pid:**, fid:**, name:'**', icon_type:**, icon_id:**, icon_url:**, serial_type:**, serial_format:**, serial_number:**, subject:'**')

Properties	Meaning	Remarks
fid	Request form ID	
icon_id	Icon ID	
icon_type	Icon Type	Displays one of the following values: • 0

Properties	Meaning	Remarks
		• 1 • 2
icon_url	Icon URL	
name	Request Form Name	
pid	Request ID	
serial_format	Request number format	
serial_number	Last request number	
serial_type	Request Number Type	Displays one of the following values: • 0 • 1 • 2
subject	Subject	

1.10.23.16. Logs of Processing Requests

Action	Level	log
Approval of requests	Important	[modify]petition_accept (pid:**, comment:**, approved_serial_type:**, approved_serial_format:**, approved_serial_number:**)
Reject Request	Important	[modify] petition_reject (pid:**, comment:**)

Action	Level	log
Confirming Requests	Important	[modify] petition_confirm (pid:**, comment:**)
Request Progress	Important	[modify] petition_remand (pid:**, comment:**)
Withdrawing Requests	Important	[modify] petition_cancel (pid:**, uid:**, status:**, comment:**, ptime:**)
Deleting a request	Important	[delete] folder_relation_delete (foid:**, pid:**)
Delete Requests	Important	[delete] folder_relation_delete_multi (foid:**, pids_1:**)
Printing Requests	Important	[print] petition_print
Failed to send request e-mail.	Warning	Could not forward the workflow notification
Changing the processor for a route step	Important	[modify] petition_path_step_modify(add_uids_1:**, deleted_uids_1:**, comment:'**')

Properties	Meaning	Remarks
Integers starting with Add_uids_	Additional User ID	
approved_serial_format	Approval number format	
approved_serial_number	Approval Number	
approved_serial_type	Approval numbering	
comment	Comment	
Integers starting with Deleted_uids_	Delete User ID	
fid	Request form ID	
foid	Folder ID	
pid	Request ID	

Properties	Meaning	Remarks
Integers starting with Pids_	Request ID	
ptime	Cancel Time Back Time	
status	Request Status	
uid	User ID	

1.10.23.17. Logs of Proxy Settings

Action	Level	log
Changing delegates	Important	[modify] agent_modify (uid:**, agent_petition_1:'**', agent_approval_1:'**')

Properties	Meaning	Remarks
Integers starting with Agent_approval_	Proxy approver User ID	
Integers starting with Agent_petition_	Proxy Applicant User ID	
uid	User ID	

1.10.23.18. Logs of Request Visibility

Action	Level	log
Add new entry	Important	[create] public_add (uids_1:**, gids_1:**, srids_1:**, drids_1:**, security_modex:'**', authority:'**')
Delete user rights	Important	[delete] public_delete_multi (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete all permissions	Important	[delete] public_delete_all (cid:**)
Change security model	Important	[modify] public_model_modify (cid:**, security_model:'**')

Properties	Meaning	Remarks
authority	Permissions	Displays one of the following values: • on • off
cid	Category ID	
Integers starting with Drids_	Dynamic Role ID	
Integers starting with Gids_	Group ID	
security_model	Security model	One of the following values is displayed: • grant • revoke
Integers starting with Srids_	Static Role ID	
Integers starting with Uids_	User ID	

1.10.23.19. Logs of Workflow Portlet Configuration

Action	Level	log
Configuring Portlets	Important	[config] portlet_set (folder_type:**, font_size:'**', number:'**', status:'**', transactor:'**', time:'**', rows:**)

Properties	Meaning	Remarks
folder_type	Types of Lists	Displays one of the following values: • 2 (Reception list) • 3 (send list) • 6 (draft)
font_size	Character size	
number	Show number	One of the following values is displayed: • on • off
rows	Number of views	
status	View status	One of the following values is displayed: • on • off
time	Request Date View	One of the following values is displayed: • on • off
transactor	View Applicant or processor	One of the following values is displayed: • on

Properties	Meaning	Remarks
		• off

1.10.24. Multireport Logs

This section describes logs for Multireport.

References

- Logs of Report Form List(519Page)
- Logs of Report Form Information(521Page)
- Logs of Report Form Items(522Page)
- Logs of MultiReport Access Permissions(530Page)
- Logs of Operational Administrative Privileges for MultiReport(531Page)
- Logs of Report Filters(532Page)
- Logs of Report Management(534Page)
- Logs of CSV File Operations for MultiReport(534Page)
- Logs of Reports(536Page)
- Logs of MultiReport Portlet Settings(538Page)

1.10.24.1. Logs of Report Form List

Action	Level	Log
Adding Categories	Important	[create] category_add (cid:**, name:**, foreign_key:**, memo:**)
Change categories	Important	[modify] category_modify (cid:**, name:**, foreign_key:**, memo:**)
Move categories	Important	[modify] category_move (cid:**, s_cid:**)
Delete categories	Important	[delete] category_delete (cid:**)
Adding a category name	Important	[create] category_local (cid:**, language_code:**, category_name:**)
Renaming category	Important	[modify] category_local (cid:**, language_code:**, prev_category_name:**, next_category_name:**)
Deleting category names	Important	[delete] category_local (cid:**, language_code:**, category_name:**)
Reorder subcategories	Important	[modify] category_order (cids_1:'**',cids_2:'**')
Adding Report Forms	Important	[create] form_add (cid:**, fid:**, name:'**', foreign_key:'**', enable_follow:'**', enable_member:'**', enable_partner:'**', memo:'**')
Copying Report Forms	Important	[create] form_copy (fids_1:'**')
Deleting a report form in bulk	Important	[delete] form_delete_multi (fids_1:'**')
Delete all report forms	Important	[delete] form_delete_all (cid:**)
Import Report Form XML	Important	[import] form_import (forms_1:'**', items_1:'**')
Export Report Form XML	Important	[export] form_export
Adding a separator line	Important	[create] form_separator_add (cid:**, fid:**)

Action	Level	Log
Reorder Report form or separator lines	Important	[modify] form_order (cid:**, fids_1:'**',fids_2:'**')

Properties	Meaning	Remarks
cid	Category ID	
Integers starting with Cids_	Category ID	
enable_follow	Allow Comment	One of the following values is displayed: • on • off
fid	Report Form ID	
Integers starting with Fids_	Report Form ID	
foreign_key	Category Code Report Form Code	
Integers starting with Forms_	Report Form foreign key	
Integers starting with Items_	Report Item FOREIGN Key	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
memo	Memo	
name	Category names Form name	

Properties	Meaning	Remarks
s_cid	Parent category ID	

1.10.24.2. Logs of Report Form Information

Action	Level	log
Changing the Notes for administrators	Important	[modify] form_memo_modify (fid:**, admin_memo:'**')
Changing report form Information	Important	[modify] form_modify (fid:**, name:'**', foreign_key:'**', enable_follow:'**', enable_member:'**', enable_partner:'**', memo:'**')
Moving Report Forms	Important	[modify] form_order (cid:**, fids_1:'**',fids_2:'**')
Enable/Disable Report form	Important	[modify] form_activate (fid:**, active:'**')
Deleting a report form	Important	[delete] form_delete (fid:**)

Properties	Meaning	Remarks
active	Enable/Disable Report form	One of the following values is displayed: • active • deactive
admin_memo	Notes for Administrators	
cid	Category ID	
Integers starting with Cids_	Category ID	

Properties	Meaning	Remarks
enable_follow	Whether to allow comments to be written	One of the following values is displayed: • on • off
enable_member	Whether to use the input field of attendees	One of the following values is displayed: • on • off
enable_partner	Whether to use the input field of the other party	One of the following values is displayed: • on • off
fid	Report Form ID	
foreign_key	Report Form Code	
memo	Description	
name	Form name	
s_cid	Category ID After moving	

1.10.24.3. Logs of Report Form Items

Action	Level	log
Adding a string (one line) item	Important	[create] form_layout_string_single_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, size:**, max_input_size:**,

Action	Level	log
		input_chars:**, initial_type:**, initial_text_value:**, initial_user_value:**, required:**)
Changing a string (one line) item	Important	[modify] form_layout_string_single_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, size:**, max_input_size:**, input_chars:**, initial_type:**, initial_text_value:**, initial_user_value:**, required:**)
Adding a String (multiline) item	Important	[create] form_layout_string_multiple_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, col_size:**, row_size:**, initial_value:**, required:**)
Changing text (Multiline) fields	Important	[modify] form_layout_string_multiple_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, col_size:**, row_size:**, initial_value:**, required:**)
Adding a menu item	Important	[create] form_layout_menu_string_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, menu_items:'**', initial_value:**, menu_item_type:**, required:**)
Changing a menu item	Important	[modify] form_layout_menu_string_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, menu_items:'**', initial_value:**, menu_item_type:**, required:**)
Adding radio button fields	Important	[create] form_layout_radio_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, radio_items:'**', initial_value:**, required:**)

Action	Level	log
Changing radio button fields	Important	[modify] form_layout_radio_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, radio_items:'**', initial_value:**, required:**)
Adding check box fields	Important	[create] form_layout_checkbox_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_value:**)
Changing check box fields	Important	[modify] form_layout_checkbox_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_value:**)
Adding numeric fields	Important	[create] form_layout_numeric_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, input_numbers:**, initial_value:**, effective_figures:**, minus_type:**, right_align:**, split_rank:**, max_input_number:**, min_input_number:**, required:**)
Changing numeric fields	Important	[modify] form_layout_numeric_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, input_numbers:**, initial_value:**, effective_figures:**, minus_type:**, right_align:**, split_rank:**, max_input_number:**, min_input_number:**, required:**)
Adding a Date field	Important	[create] form_layout_date_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_type:**, initial_year:**, initial_month:**, initial_day:**, required:**)
Changing date fields	Important	[modify] form_layout_date_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**,

Action	Level	log
		description_editor:**, description:**, description_type:**, initial_type:**, initial_year:**, initial_month:**, initial_day:**, required:**)
Adding Time fields	Important	[create] form_layout_time_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, unit:**, initial_type:**, initial_hour:**, initial_minute:**, required:**)
Changing Time fields	Important	[modify] form_layout_time_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, initial_type:**, initial_hour:**, initial_minute:**, required:**)
Adding a file attachment	Important	[create] form_layout_file_add (fid:**, iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, max_files:**, inline:**, thumbnail:**, thumbnail_xsize:**, thumbnail_ysize:**, required:**)
Changing file attachments	Important	[modify] form_layout_file_modify (iid:**, data_type:**, display_name:**, option_string_type:**, option_string:**, description_editor:**, description:**, description_type:**, max_files:**, inline:**, thumbnail:**, thumbnail_xsize:**, thumbnail_ysize:**, required:**)
Adding Empty Lines	Important	[create] formlayout_blank_add (fid:**, iid:**)
Delete Item	Important	[delete] form_layout_delete (iid:**)
Deleting items in bulk	Important	[delete] form_layout_delete_multi (iids_1:**)
Delete all items	Important	[delete] form_layout_delete_all (fid:**)
Copying Items	Important	[create] form_layout_copy (fid:**, iids_1:**)
Reorder Items	Important	[modify] formlayout_order (fid:**, iids_1:**)

Properties	Meaning	Remarks
authority	Permissions	One of the following values is displayed: • on • off
cid	Category ID	
col_size	Digits	
data_type	FOREIGN key	
description	Description	
description_editor	Description format	One of the following values is displayed: • text • edit
description_type	Explanation icon	One of the following values is displayed: • icon • not_icon
display_name	Item name	
Integers starting with Drids_	Dynamic Role ID	
effective_figures	Decimal places	
fid	Report Form ID	
Integers starting with Gids_	Group ID	
iid	Item ID	
Integers starting with Iids_	Item ID	
initial_day	Day	
initial_hour	When	
initial_minute	Minutes	

Properties	Meaning	Remarks
initial_month	Month	
initial_text_value	Default value for direct input	
initial_type	Initial value of "string (one line)" Field	One of the following values is displayed: • manual_input • user_info
initial_type	Default value of "Date" field	Displays one of the following values: • now_date • specific_date • blank_date
initial_type	The default value of the Time field	Displays one of the following values: • now_time • specific_time • blank_time
initial_user_value	User profile	
initial_value	Default value:	
initial_value	Default check boxes	One of the following values is displayed: • checked • not_checked
initial_year	Years	
inline	View Files	One of the following values is displayed: • inline • not_inline
input_chars	Limits	Displays one of the following values: • full • half

Properties	Meaning	Remarks
		• no_limit
input_numbers	Limitation on input	One of the following values is displayed: • limit • no_limit
max_files	Maximum number of files	
max_input_number	Maximum Value	
max_input_size	Maximum number of characters	
menu_item_type	Type of menu item	One of the following values is displayed: • 0 • 1
Integers starting with Menu_items_	Contents of Menu	
min_input_number	Minimum value	
minus_type	The way to show negative numbers	
option_string	Text to be placed before or after	
option_string_type	Character placement before or after	
Integers starting with Radio_items_	Contents of Radio Items	
required	Required input	One of the following values is displayed: • required • not_required

Properties	Meaning	Remarks
right_align	Justified	One of the following values is displayed: • right_align • not_right_align
row_size	Row	
security_model	Security model	One of the following values is displayed: • grant • revoke
size	Input width	
split_rank	Thousands-delimited view	One of the following values is displayed: • split_rank • not_split_rank
Integers starting with Srids_	Static Role ID	
thumbnail	Thumbnail images	One of the following values is displayed: • thumbnail • not_thumbnail
thumbnail_xsize	Width	
Integers starting with Uids_	User ID	
unit	Unit of time	

1.10.24.4. Logs of Access Permissions for Multireport

	Level	log
Add new entry	Important	[create] access_add (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**, security_model:**, authority:**)
Delete user rights	Important	[delete] access_delete_multi (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete all permissions	Important	[delete] access_delete_all (cid:**)
Change security model	Important	[modify] access_model_modify (cid:**, security_model)

Properties	Meaning	Remarks
authority	Permissions	One of the following values is displayed: • on • off
cid	Category ID	
Integers starting with Drids_	Dynamic Role ID	
Integers starting with Gids_	Permissions	
security_model	Group ID	
authority	Security model	One of the following values is displayed: • grant • revoke
Integers starting with Srids_	Static Role ID	

Properties	Meaning	Remarks
Integers starting with Uids_	User ID	

1.10.24.5. Logs of Operational Administrative Privileges for MultiReport

Action	Level	Log
Adding operational administrative privileges	Important	[create] privilege_add (uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete Operational administrative privileges in bulk	Important	[delete] privilege_delete_multi (cid:**, uids_1:**, gids_1:**, srids_1:**, drids_1:**)
Delete all operational administrative privileges	Important	[delete] privilege_delete_all (cid:**)

Properties	Meaning	Remarks
cid	Category ID	
Integers starting with Drids_	Dynamic Role ID	
Integers starting with Gids_	Group ID	
Integers starting with Srids_	Static Role ID	
Integers starting with Uids_	User ID	

1.10.24.6. Logs of Report Filters

Action	Level	log
Adding Filters	Important	[create] filter_add (fid:**, name:**, and_or:**)
Changing Filters	Important	[modify] filter_modify (fid:**, name:**, and_or:**)
Adding filter conditions	Important	[create] filtercondition_add (fid:**, cid:**, type:**, number:**, text:**, condition:**)
Changing the filter conditions	Important	[modify] filtercondition_modify (fid:**, cid:**, type:**, number:**, text:**, condition:**)
Elimination of filter conditions	Important	[delete] filtercondition_delete (fid:**, cid:**)
Copying Filters	Important	[create] filter_copy (fids_1:**)
Deleting Filters	Important	[delete] filter_delete (fid:**)
Delete all Filters	Important	[delete] filter_delete_multi (fids_1:**)
Eliminated all the filters in the category	Important	[delete] filter_delete_all (cid:**)
Enabling/Disabling the filter	Important	[modify] filter_activate (fid:**, active:'**')

Properties	Meaning	Remarks
active	Enabling/Disabling the filter	One of the following values is displayed: • active • deactive
and_or	Filter conditions	One of the following values is displayed: • and • or
cid	Category ID Filter Condition ID	If you want to delete all the filters in the category, "CID" means the category ID.

Properties	Meaning	Remarks
condition	Filter conditions	The following conditions are available • Include • Not_include (not included) • Equal (same as) • Not_equal (and different) • Start (starts) • End (ends with) • After (or later) • Before (formerly) • Bigger (larger) • And_over (more) • Smaller (smaller) • Or_less
fid	Filter ID	
name	Filter Name	
number	Value of comparison	
text	Filter strings	
type	Types of filter	The types of filter are as follows • Creator • Date Created • Item • Item_detail (If an item is specified) • Follow (comment)

1.10.24.7. Logs of Report Management

Action	Level	log
Delete reports	Important	[delete] report_delete (rid:**)
Deleting a report in bulk	Important	[delete] report_delete_multi (rids_1:**)
Delete all reports	Important	[delete] report_delete_all (fid:**)

Properties	Meaning	Remarks
fid	Report Form ID	
rid	Report ID	
Integers starting with Rids_	Report ID	

1.10.24.8. Operational Logs of Multireport CSV Files

Action	Level	log
Import categories	Important	[import] category_import (parent_foreign_key_1:**, foreign_key_1:**, name_1:**, memo_1:**)
Export categories	Important	[export] category_export
Import category Name	Important	[import] category_local (cid:**, language_code:'**', prev_category_name:'**', next_category_name:'**')
Export category names	Important	[export] category_local (cid:**, languageCode:**, category_name:**)

Action	Level	log
Importing User Rights	Important	[import] category_accesses_import (foreign_key_1:**, item_1:**, value_1:**, name_1:**)
Exporting User Rights	Important	[export] category_accesses_export

Properties	Meaning	Remarks
category_name	Category names	
cid	Category Code	
foreign_key	Category key	
item	User Rights settings	
language_code	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
languageCode	Language code	Displays one of the following values: • ja (Japanese) • en (English) • zh (Simplified Chinese) • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
memo	Memo	
name	Category names User Rights settings	

Properties	Meaning	Remarks
next_category_name	Category name after the change	
parent_foreign_key	Parent category Key	
prev_category_name	Original category names	
value	Security model	

1.10.24.9. Report Logs

Action	Level	log
Create reports	Important	[create] report_add (rid:**, fid:**, name:**, subject:**, private:**)
Change reports	Important	[modify] report_modify (rid:**, fid:**, name:**, subject:**, private:**)
Delete reports	Important	[delete] report_delete (rid:**)
View reports	Important	[browse] report_browse (rid:**, uid:**)
Reusing the reports	Important	[create] report_reuse (rid:**, fid:**, name:**, subject:**, private:**)
Save a report as a draft	Important	[create] report_draft_add (rid:**, fid:**, name:**, subject:**, private:**)
Changing the draft	Important	[modify] report_draft_modify (rid:**, fid:**, name:**, subject:**, private:**)

Action	Level	log
Delete Draft	Important	[delete] report_draft_delete (rid:**)
Post comments	Important	[create] follow_add (rid:**, follow_id:**, uid:**)
Deleting comments	Important	[delete] follow_delete (rid:**, follow_id:**)

Properties	Meaning	Remarks
fid	Report Form ID	
file_id	File ID	
name	Form name Attachment Name	
private	Private to users other than attendees and notification recipients	Displays one of the following values: • private • public
rid	Report ID	
subject	Subject	
uid	User ID	
version	Version of attachment	

1.10.24.10. Logs of MultiReport Portlet Settings

Action	Level	log
Configuring Portlets	Important	[config] portlet_set (display_type:**, fid:**, font_size:**, creator:**, mtime:**, rows:**)

Properties	Meaning	Remarks
creator	Author view	
display_type	Types of Lists	Displays one of the following values: • receive • send • draft • all • filter
fid	Filter ID	
font_size	Character size	
mtime	View the updated date and time	One of the following values is displayed: • on • off
rows	Number of views	

1.10.25. KUNAI Logs

Setting up User Permissions

Action	Level	log
Add permissions	Important	[add] availability_user_add (availability_1: 'dynamic_role/static_role/group/user:**, schedule:**, message:**, workflow:**, mail:**, address:**, space:**, bulletin:**, report:**', availability_2: ...)
Changing permissions	Important	[modify] availability_user_modify (dynamic_role/ static_role/group/user:**, schedule:**, message:**, workflow:**, mail:**, address:**, space:**, bulletin:**, report:** , availability_2: ...)
Delete permissions	Important	[delete] availability_user_delete_multi (dynamic_role/ static_role/group/user:**, ...)
Delete all permissions	Important	[delete] availability_user_delete_all
Import from CSV file	Important	[import] availability_user_import (availability_1: 'dynamic_role /static_role/ group/user:**, schedule:**, message:**, workflow:**, mail:**, address:**, space:**, bulletin:**, report:**', availability_2: ...)
Export to CSV file	Important	[export] availability_user_export

Properties	Meaning	Remarks
address	Address Book	One of the following values is displayed: • 1 (Allow) • 0 (limit)
Integers starting with availability_	Target for which you want to set permissions	Displays one of the following values: • dynamic_role • Static_role (Static role) • group • user
bulletin	Bulletin Board	One of the following values is displayed: • 1 (Allow) • 0 (limit)

Properties	Meaning	Remarks
mail	E-mail	One of the following values is displayed: • 1 (Allow) • 0 (limit)
message	Messages	One of the following values is displayed: • 1 (Allow) • 0 (limit)
report	MultiReport	One of the following values is displayed: • 1 (Allow) • 0 (limit)
schedule	Scheduler	One of the following values is displayed: • 1 (Allow) • 0 (limit)
space	Space	One of the following values is displayed: • 1 (Allow) • 0 (limit)
workflow	Workflow	One of the following values is displayed: • 1 (Allow) • 0 (limit)

1.10.26. Response Logs

General Settings

Action	Level	log
Limiting Application Users	Important	[config] common (allow_respond:'sch:**, mssg:**, bllt:**')

Properties	Meaning	Remarks
allow_respond	Permission for the respond feature	
sch[1]	Scheduler	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
bllt	Bulletin Board	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)
mssg	Messages	One of the following values is displayed: • 0 (do not allow) • 1 (Allow)

[1]: Displayed in Garoon version 5.9.0 or later.

1.10.27. Cybozu Office / Dezie Connector Logs

Cybozu Office Connector

Cybozu For information on logs for Office Connector, refer to "Appendix Log" in the Custom App Integration Guide (PDF).

Dezie Connector

For information on logs for Dezie Connector, refer to "Appendix B Log Output Specifications" in the Dezie Connector Guide (PDF).

1.10.28. Image Assets Logs

List of Image Assets

Action	Level	log
Add image assets	Important	[create] file (fid:**, file_name:'**', file_key:'**')
Updating image assets	Important	[update] file (fid:**, file_name:'**', file_key:'**')
Deleting Image Assets	Important	[delete] file (fid:**, file_name:'**', file_key:'**')

Properties	Meaning	Remarks
fid	File ID	
file_key	File key	
file_name	File name	

1.10.29. Personal Settings Logs

Changing Your Password

Action	Level	log
Changing Your Password	Important	[change] password (uid:**, name:**, account:**)

Properties	Meaning	Remarks
account	Login name	
name	User name	
uid	User ID	

My Group Settings

Action	Level	log
Adding my Groups	Important	[create] mygroup (mgid:'**', owner:'**', name:'**, memo:'**')
Changing my Group	Important	[modify] mygroup (mgid:'**', owner:'**', name:'**', memo:'**', uids:'**,**', faids:'**')
Deleting my groups	Important	[delete] mygroup (mgid:'**', owner:'**', name:'**', memo:'**')
Reorder my Groups	Important	[order] mygroup (mgids:'**, **, **')
Adding users/facilities belonging to the My group	Important	[user_assign] mygroup (mgid:'**', uids:'**, **', faids:'**')

Properties	Meaning	Remarks
faids	Facility ID (multiple)	
memo	Memo	
mgid	My group ID	
mgids	My group ID (multiple)	
name	My group name	
owner	Create User ID	

Properties	Meaning	Remarks
uids	User ID (multiple)	

1.10.30. Command Operation Log

Action	Level	log
Delete appointments	Important	[delete_all] command_line_delete_event (before_date:**)
Delete Messages	Important	[delete] message (mid:**, creator_name:**, subject:**, data:**, file_name_1:**, receiver_name_1:**)
Delete Topics	Important	[delete] article (aid:**, subject:**)
Deleting attachments	Important	[delete] file (aid:**, fid:**)

Properties	Meaning	Remarks
aid	subject	
before_date	Bulletin ID	
data	Date to be deleted	
fid	Contents	
file_name_[integer starting from 1]	Follow ID	
mid	Attachment name	

Properties	Meaning	Remarks
receiver_name_[integer starting from 1]	Message ID	

1.11. Licenses

This section describes license for Garoon.

References

- Garoon Trial Period(545Page)
- Registering Your License(548Page)
- Cannot add license key.
- After the expiration of renewed service license, will the service be unavailable?

1.11.1. Garoon Trial Period

You can use Garoon for trial for 60 days after installing Garoon. All features of Garoon are available during the trial period.
However, if a valid license has not been added at the end of the trial period, you will not be able to use Garoon.

Administrators can access the system administration screen, but can only view information on the "Notifications" tab.
Only system administrators and basic system administrators who have administrative privileges for license management can access the "Manage Licenses" screen in system administration.

If you want to continue using Garoon, you must add a valid license before the trial period ends.
For details, see the "Registering Your License(548Page)" page.

Language Used in Garoon After the Trial Period

When the trial period ends, language displayed in Garoon varies depending on the language that you have set.

- If you have set "Japanese", "English", "Simplified Chinese", or "Traditional Chinese":
  The screen is displayed in the language that you have set.
- If you set "Priority browser Settings"
  The screen is displayed in the language that is set in the Web browser. If a language that is not supported by Garoon is set in the Web browser, the language used in the OS (Japanese, English, Simplified Chinese, or Traditional Chinese) will be used.

Note

- When the trial period ends, the scheduling service(1657Page) is stopped.

1.11.2. About Service Licenses

A service license is a service to ensure that Garoon is used safely and conveniently.
It provides support services for system administrators as well as useful features for users.
For details, see the product website for the service license continuation/recontract.

Note

- During the Garoon trial period, services provided by the service license are also available. For details on the service after completing the trial period, see the "Garoon Trial Period(545Page)" section.

Service License Validity Period

If you do not renew the service license within 30 days after the end date of the service license, following services will not be available.

- Workflow, Multireport, full text search, and collaborative APIS
- Technical Support Service (Japanese only)
- Cybozu Online Service (Japanese only)
- Archive Library Service

The "Important announcements" screen of the system administration displays a message stating that the service has been stopped.
For details on services provided during the lifetime of the service license, see the product website for the contents of service license.

Note

- After the expiration of the service license, language used in Garoon is the language you set when installing Garoon.

1.11.3. Managing Licenses

To continue to use Garoon, you must add a license key.

Caution

- License key differs between version 4 or earlier and version 5. When you upgraded Garoon from version 4 or earlier, you need to register a license key for "Garoon 5".

Note

- In Garoon, an Internet connection is not required because you don't need to communicate with external servers when registering a license. You can register a license even if the external connection is restricted.

Registering Your License

Register a license key.

You cannot change or delete a registered license.

Steps:

1. Click the administration menu icon (gear icon) in the header.

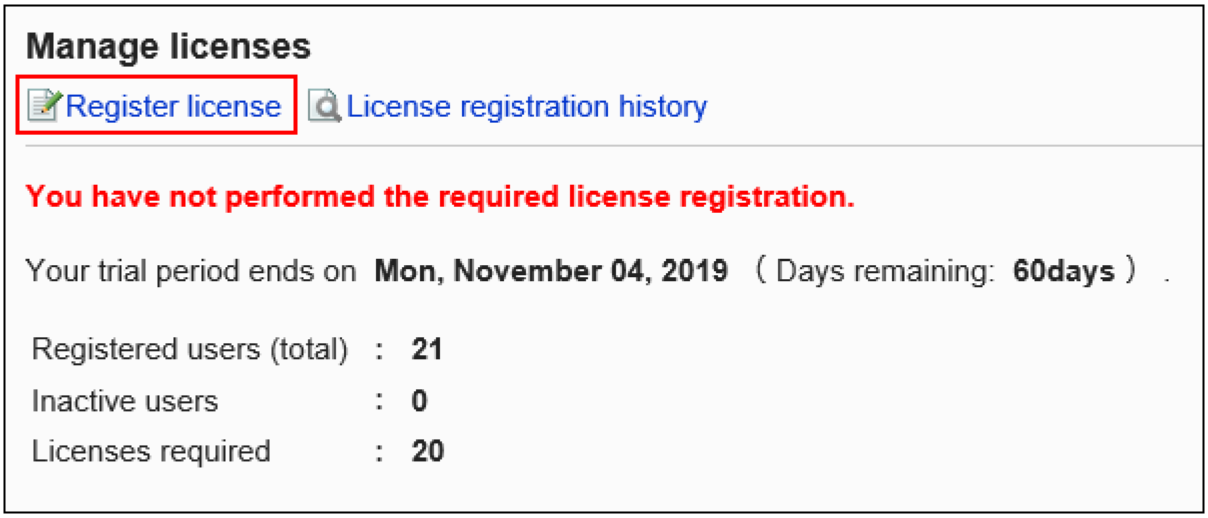
2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "License".

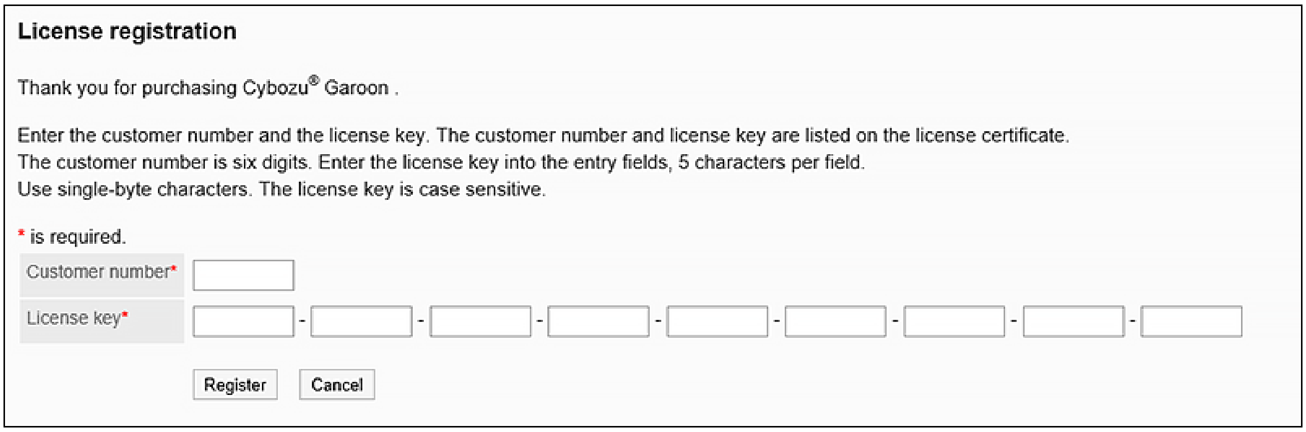
5. Click "Manage Licenses".

6. On the "License Management" screen, click "Add License".



7. On the "License Registration" screen, enter your customer number and license key, and click "Add".

- Customer Number:
  Enter the customer number shown in the license key certificate.
- License Key:
  Enter the license key shown in the license key certificate.
  Enter the license key, by placing spaces after every five characters.



8. **On the "Confirm license Details" screen, confirm your settings and click "Add".**

Checking Your License History

Check your license history.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

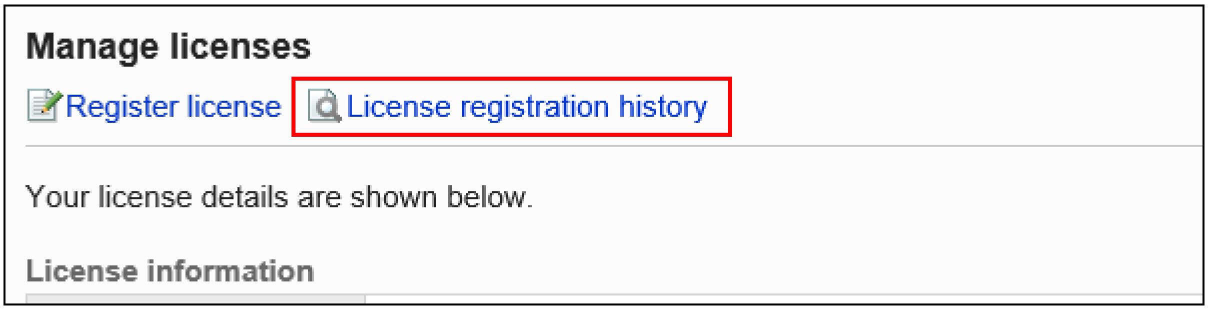
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

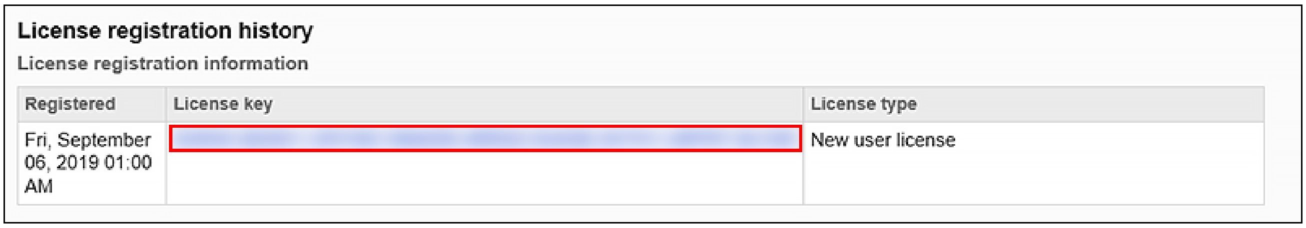
4. **Click "License".**

5. **Click "Manage Licenses".**

6. **On the "License Management" screen, click "License History".**



7. **On the "License History" screen, click the license key to see the details.**



8. **On the "License Details" screen, check the license information.**

1.12. External Server

On External Server, you can set the system mail account that Garoon uses to send e-mail notifications.

References

- Flow until e-mail notifications are available(555Page)
- How can I connect to Cybozu Online Service?

1.12.1. Setting up System Mail Account

Set up the system e-mail account and the e-mail server to be used for sending e-mail notifications.
The e-mail server configured here must be able to access the server where Garoon is installed.

What is System Mail Account

The system mail account is an e-mail address that is used as the sender of e-mail notifications from features like Phone messages and Workflow. You can send e-mail notifications by setting up a system e-mail account, regardless of whether or not the e-mail feature is enabled.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

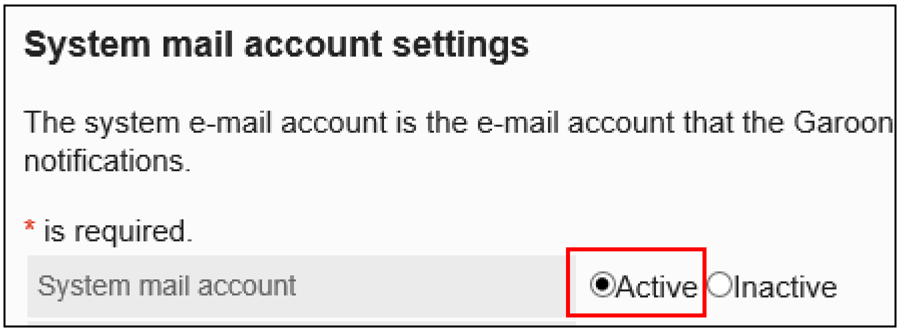
3. **Select "Basic system administration" tab.**

4. **Click the item for external servers.**

5. **Click "System mail account settings".**

6. **In the "System mail account" field on the "System mail account settings" screen, select "Enable".**

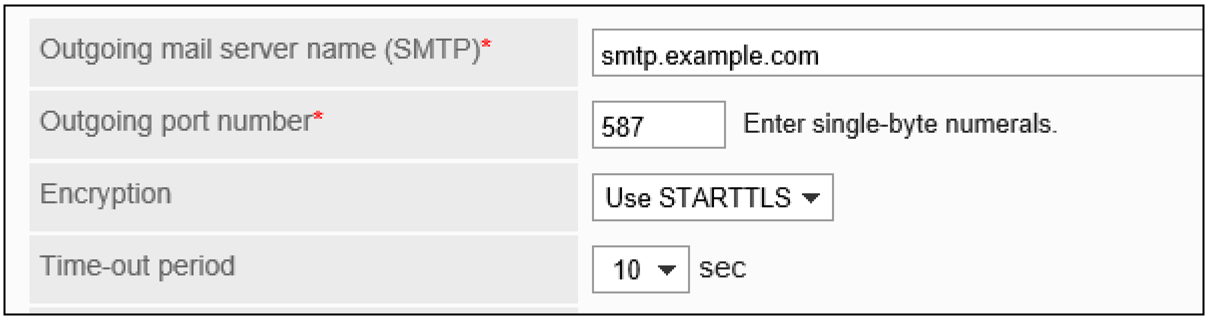
   To stop sending e-mail notifications, select "Disable".



7. **In the "System E-mail Address" field, enter the e-mail address to be used as the system mail account.**

   You must set the system e-mail address.

8. **Set up the outgoing mail server information.**



Outgoing E-Mail Server Setting Fields

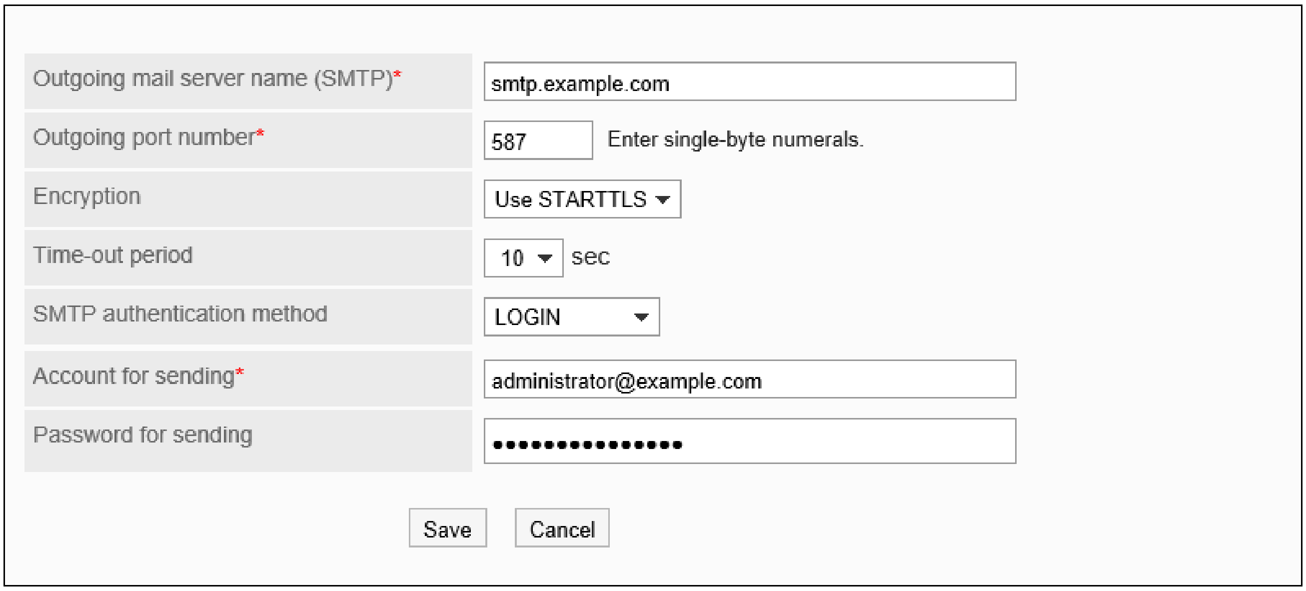
Outgoing mail server name (SMTP)	The outgoing e-mail server name (SMTP) must be set. Enter the IP address or host name of the outgoing e-mail server. The protocol used to send e-mail is SMTP.
Outgoing port number	The outgoing e-mail server port number must be set. Enter the port number of the outgoing e-mail server with single-byte numbers. The default value is 25.
Encryption method	Set the encrypted communication method for the outgoing mail server. To encrypt communications with the outgoing mail server, select one of the following depending on your communication method: • Use TLS • Use STARTTLS If you do not want to encrypt communications with the outgoing e-mail server, select "Disable".
Time-out period	Select the number of seconds to wait before communication with the outgoing e-mail server times out. The default value is 10 seconds. 10, 20, 30, 40, 50, 60, 70, 80, 90, 100, 120

9. Optionally, set SMTP authentication or POP before SMTP authentication.

You can use one of them as your authentication method. You cannot use both SMTP Authentication and POP before SMTP authentication at the same time.

SMTP Authentication Settings

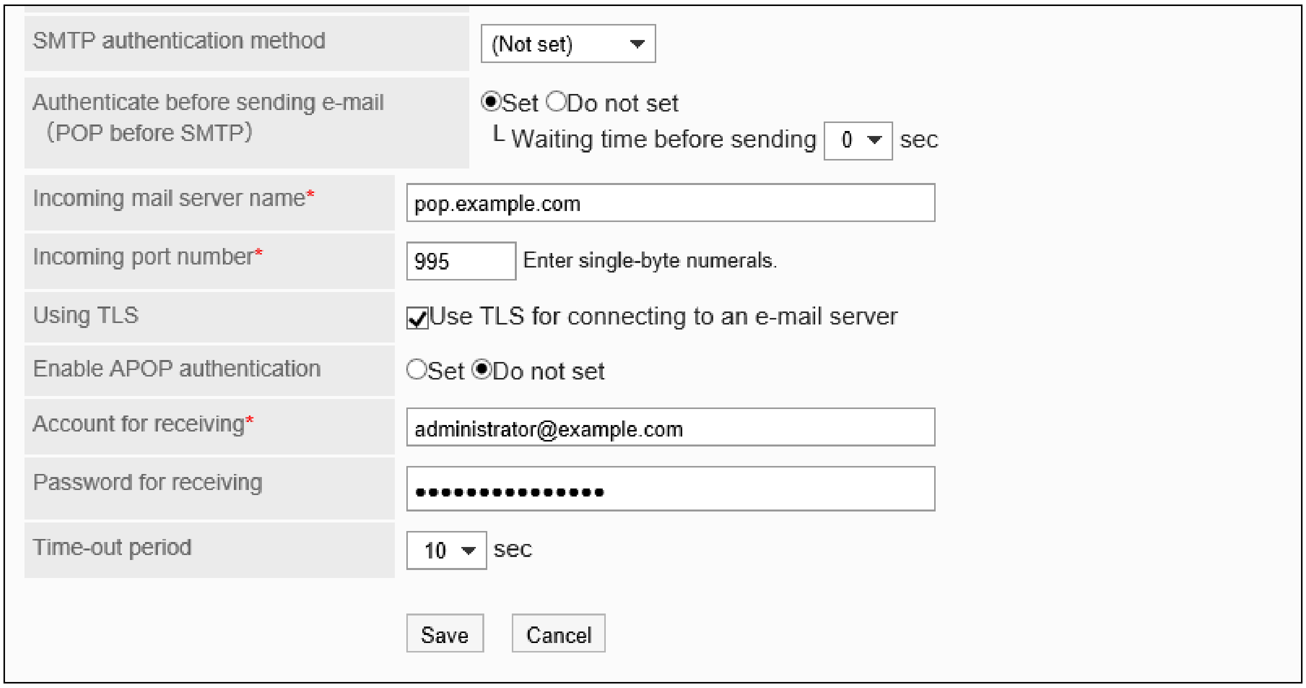
Set if the outgoing e-mail server supports SMTP authentication.
SMTP authentication settings are displayed when you select other than "(Unused)" in the "SMTP authentication method" field.



SMTP authentication method	If the outgoing e-mail server supports SMTP authentication, select an authentication method. You can select from the following authentication methods. • PLAIN • LOGIN • CRAM-MD5 • DIGEST-MD5
Account for sending	Enter an account name required for authentication.
Password for sending	Enter a password required for authentication.

Settings for POP before SMTP Authentication

Set if the outgoing e-mail server supports POP before SMTP authentication.
POP before SMTP authentication settings are displayed when you select "(Unused)" in the "SMTP authentication method" field, and select "Set" in the "Authenticate before sending e-mail (POP before SMTP)" field.



Authenticate before sending e-mail (POP before SMTP)	If the outgoing mail server supports POP before SMTP authentication, select "Set". For the wait time before sending, select the time to start sending e-mails after authentication has been performed. You can set the value from 0 to 10 seconds. The default value is 0 second.
Incoming mail server	You must set the incoming e-mail server name. Enter the IP address or host name of the incoming e-mail server.
Incoming port number	You must set the incoming e-mail server port number. Enter the port number of the incoming e-mail server with single-byte numbers. The default value is 110.
Using TLS	Select this to encrypt communications with the e-mail server.
Enable APOP authentication	If the incoming mail server supports APOP authentication, select "Set".
Account for receiving	Enter an account name for receiving e-mails.
Password for receiving	Enter a password for receiving e-mails.
Time-out period	Select the number of seconds to wait before communication with the incoming e-mail server times out. The default value is

Authenticate before sending e-mail (POP before SMTP)	If the outgoing mail server supports POP before SMTP authentication, select "Set". For the wait time before sending, select the time to start sending e-mails after authentication has been performed. You can set the value from 0 to 10 seconds. The default value is 0 second.
	10 seconds. 10, 20, 30, 40, 50, 60, 70, 80, 90, 100, 120

10. Confirm your settings and click "Save".

1.12.2. Steps to Enable E-mail Notifications

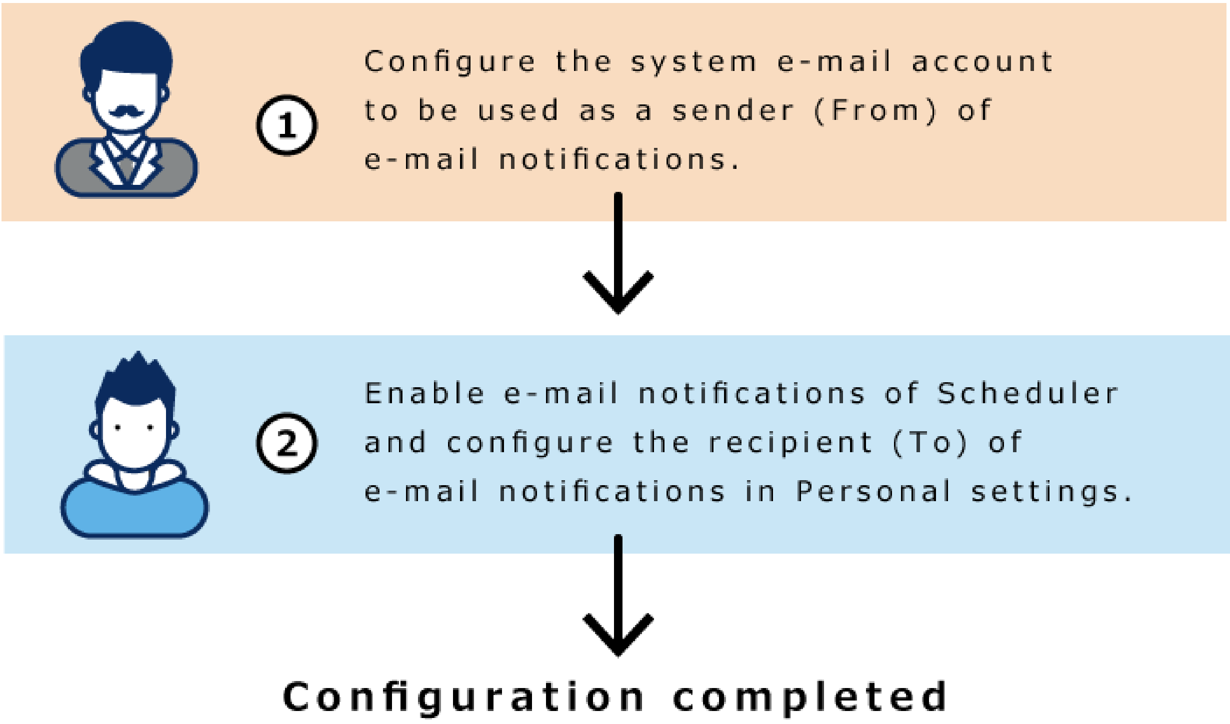
In Garoon, e-mail notifications can be used in the following applications.

- Scheduler
- Phone Messages
- Workflow

The procedures are different for system administrators  and users .

After all procedures are completed, users can receive e-mail notifications.

For E-mail Notifications of Scheduler

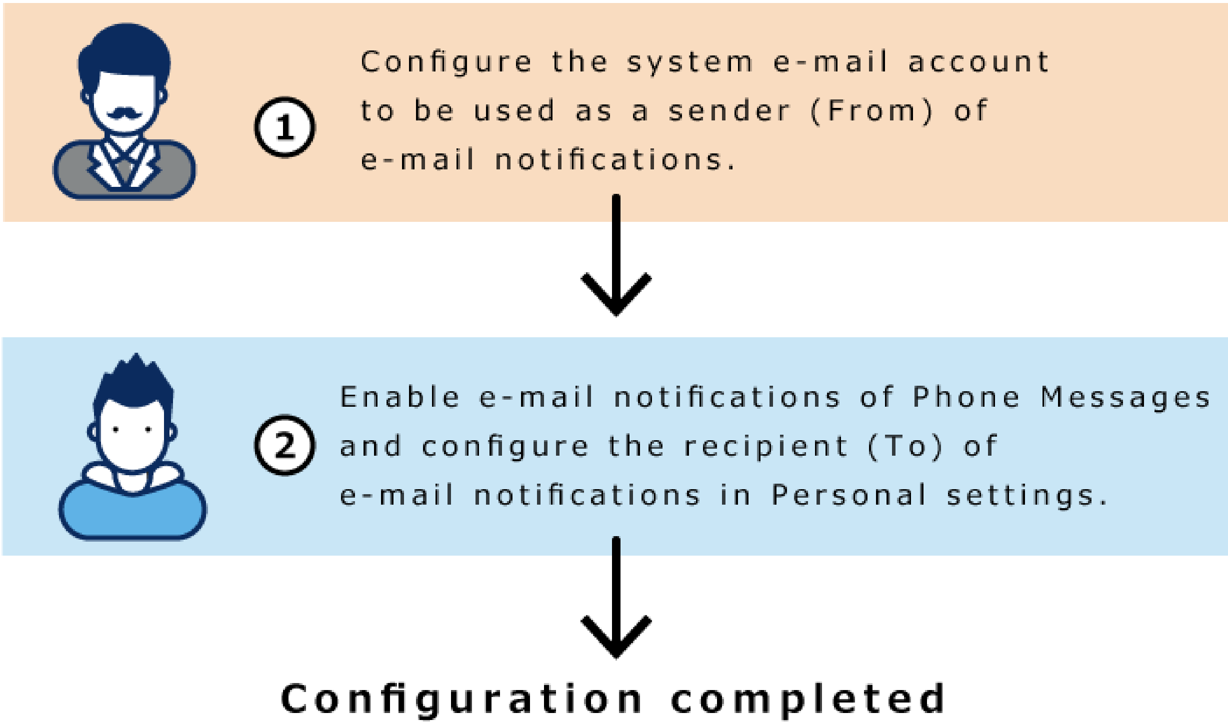


The following pages guide you through each step.

1: Setting Up System Mail Account(550Page)

2: Setting up e-mail notifications for appointment

For E-mail Notifications of Phone Messages

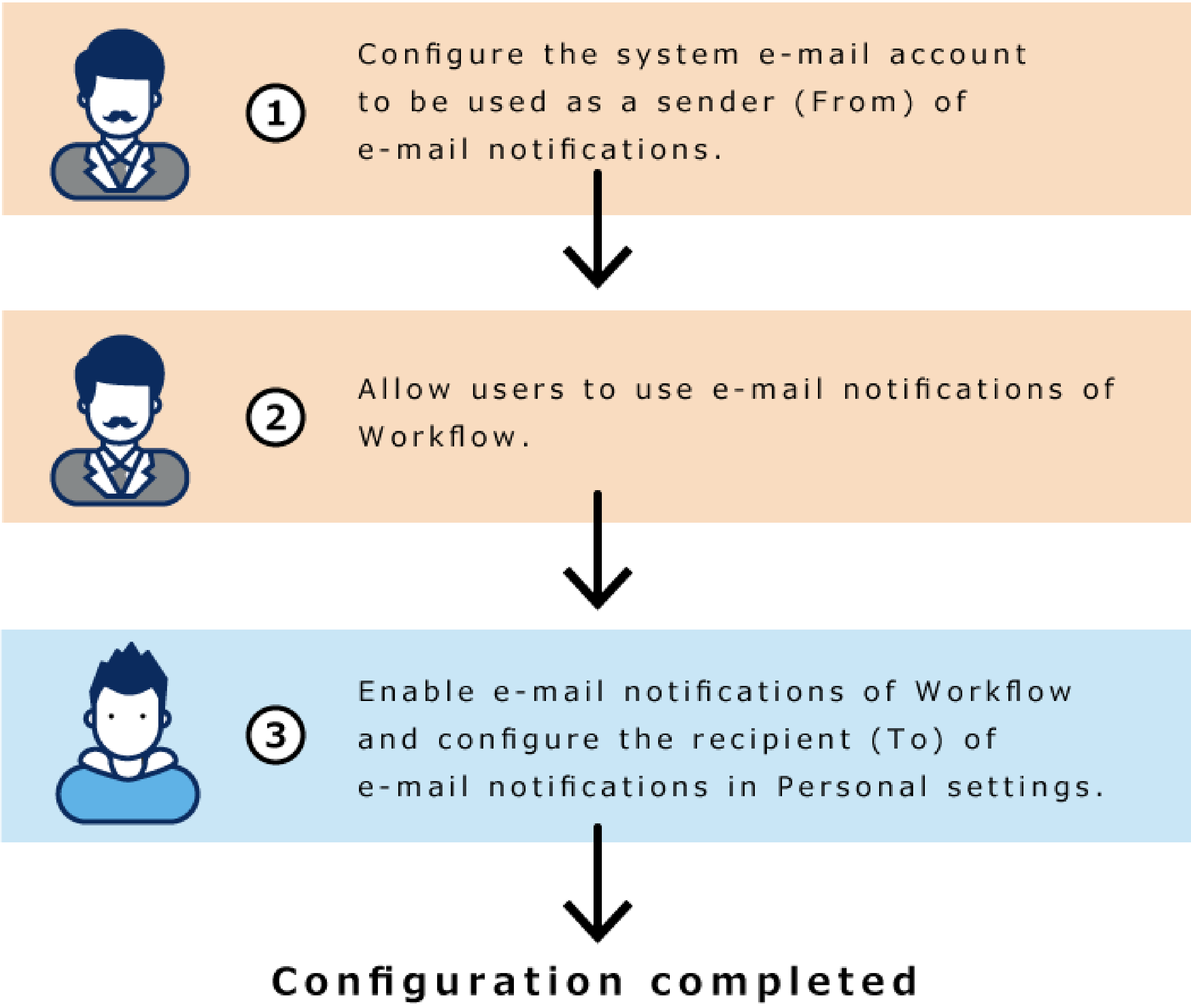


The following pages guide you through each step.

1: Setting Up System Mail Account(550Page)

2: Setting up e-mail notifications of phone messages

For E-mail Notifications of Workflow



The following pages guide you through each step.

1: Setting Up System Mail Account(550Page)

2: Allowing users to use e-mail notifications(1234Page)

3: Setting up e-mail notifications

1.12.3. Configuring Web Proxy Settings

Configure a Web proxy. This setting is required if you access the Internet from a server where Garoon is installed, and you go through a proxy.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

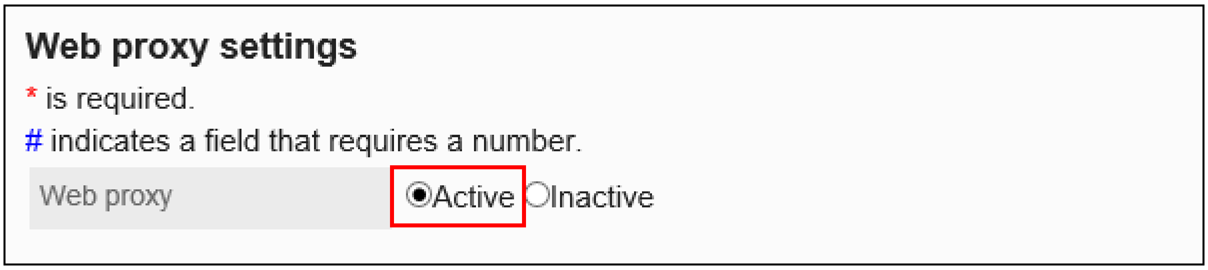
3. **Select "Basic system administration" tab.**

4. **Click the item for external servers.**

5. **Click "Web Proxy Settings".**

6. **On the screen for setting Web proxy, select to use a Web proxy.**

To stop using it, disable it.



7. **Enter the proxy server name.**

Always set the proxy server name.

Enter the host name or IP address of the proxy server.

8. **In the proxy server port number field, enter the port number of the proxy server.**

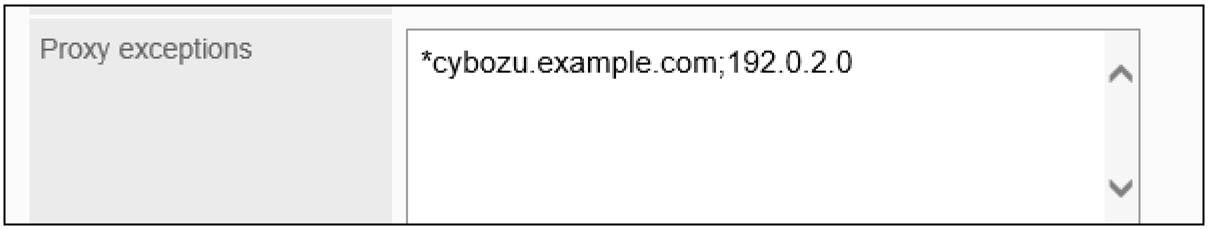
Always set this proxy server port number. Enter the value using single-byte numbers.

The default value is 8080.

9. **If necessary, set the exception address field.**

If you want to allow a request without using a proxy, specify a range of addresses.

If you specify multiple addresses, divide them using semicolons (;).



10. **Confirm your settings and click "Save".**

1.13. Localization

You can set default language, default time zone, and locale.

You use the following administration menus for "Localization".

- General settings

  You can set the locale for printing and the default locale.

  For details, see the "General Settings for Localization(561Page)" section.
- Locale Settings

  You can set the language and date format for each locale.

  For details, see the "Locale Settings(566Page)" section.

Priority of Date and Time Formats

The date and time formats are applied in the following order.

- (1) Date and time format that users have set in their personal settings.
- (2) Date and time format corresponding to the Web browser's language setting.

  The date and time formats apply to the following languages.
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese
- (3) Date and time formats that are set in the "General settings" screen for localization

Note

- If you assign an English font as the font that is displayed on the screen, the single-byte Yen sign is displayed as \ (backslashes).

Language and Display Name

System administrators can set display names in multiple languages, to be used for portals, categories, etc.
If the display name in user-defined language has not been set, the default display name is displayed.
Display names of the following items can be set in multiple languages.

- Organization name data
- Application menu
  - Title of links to applications
  - Title of links to URLs
- Office Name
- Locale Name
- Portal Name
- HTML Portlet Name
- PHP Portlet Name
- Category Name for Space
- Category Name for Shared Links Category
- Facility Name
- Facility Group Name
- Category Name for Bulletin Board
- Folder Name for Cabinet
- Book Name for Address Book
- Category Name for Workflow
- Category Name for Multireport

1.13.1. General Settings for Localization

On the general settings screen for localization, set the locale for printing, and the language and time zone that you want to apply to e-mail notifications and phone memos.

Setting Available Languages

You can set languages that users can select.

Steps:

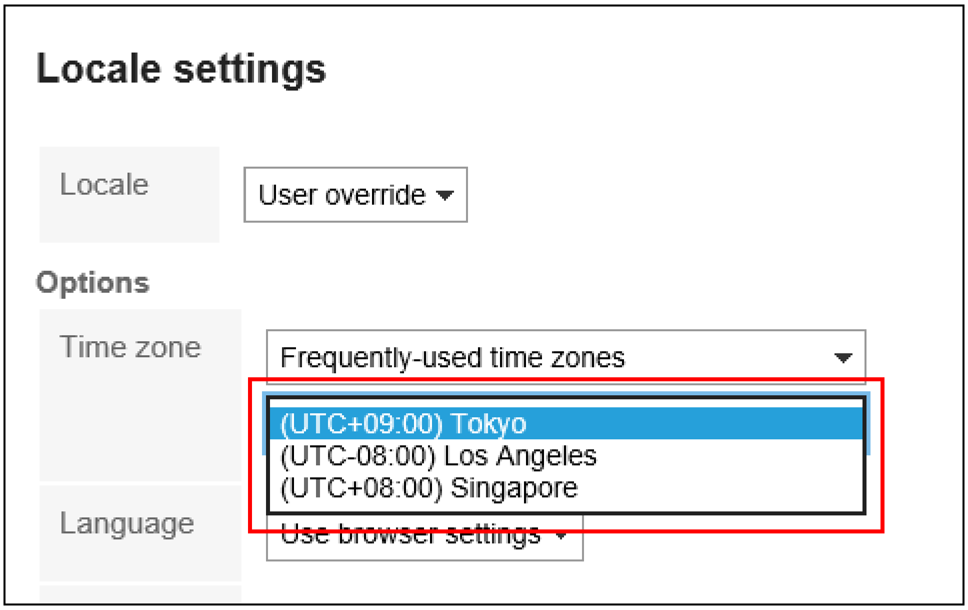
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Localization".**
5. **Click "General Settings".**
6. **In the "Available languages" field on the "General Settings" screen, select a language.**

   The following languages can be selected:
   - 日本語
   - English
   - Simplified Chinese
   - Traditional Chinese
     Displayed in Traditional Chinese.

7. **Confirm your settings and click "Save".**

Setting Frequently Used Time Zones

You can add time zones as frequently used time zones. This setting is reflected in the drop-down list to select time zones.



Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Localization".**

5. **Click "General Settings".**

6. **On the "General Settings" screen, select a time zone from the "Frequently used time zones" field.**
   On the Time Zone(1791Page) page, confirm the time zones that you can set.

7. **Confirm your settings and click "Save".**

Note

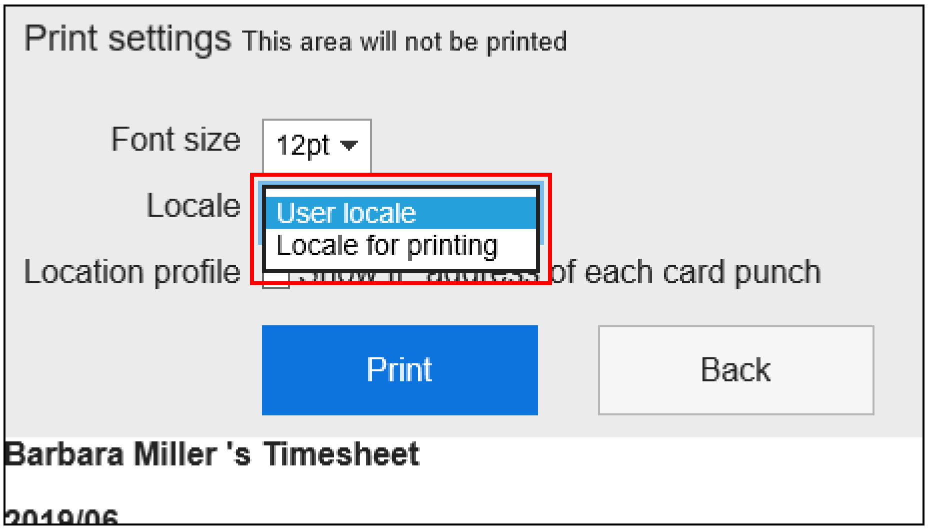
- When the time zone that is set in the user profile supports daylight saving time, daylight saving time is applied to the dates used in Garoon.
- Users can change time zone settings set by system administrators, in the locale settings section of the personal settings.

Setting Locales for Printing

Set the language and date/time format for printing time cards and schedules.

It is useful to set the locale that is easy to view when printed, according to the intended internal use.

When users print the data, they can select the locale that is set by their system administrators or the locale that they set.



Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Localization".**
5. **Click "General Settings".**
6. **In the "Locale for printing" field on the "General Settings" screen, select a language and a format.**

   The setting fields are as follows:
   - language
   - Long Date Format
   - Short Date Format
   - Time Format
7. **Confirm your settings and click "Save".**

Allowing Users to Change Locales and Offices in Their Personal Settings

Select whether to allow users to change the locale and office in their personal settings.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Localization".**
5. **Click "General Settings".**
6. **In the "Personal settings" field on the "General Settings" screen, select the check boxes of the items you want to allow users to change.**
   The following items can be selected:
   - Allow locale changes
   - Allow office changes
7. **Confirm your settings and click "Save".**

Using the English Spelling Field for User Profile

Select whether to use the English spelling field for user name.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Localization".**
5. **Click "General Settings".**

6. In the user profile field on the "General settings" screen, select the check box to use the English spelling filed.

7. Confirm your settings and click "Save".

Setting Default Locale

You can set default values for display language and time zone.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Basic system administration" tab.

4. Click "Localization".

5. Click "General Settings".

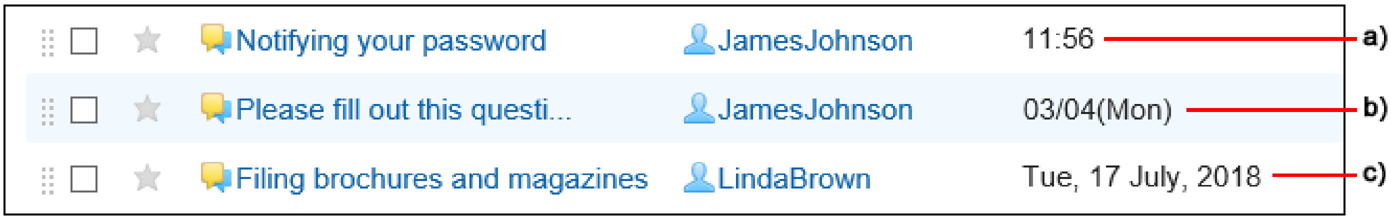
6. In the "Default locale" field on the "General Settings" screen, select a language and a time zone.

7. Confirm your settings and click "Save".

1.13.2. Configuring Locales

Locales are settings or information that are configured for each geography and language.
You can set the following items for each locale, if the date and time are displayed differently depending on the region and language in which you want to use Garoon.

- language
- Long Date Format
- Short Date Format
- Time Format



a): Time format

b): Short date format

c): Long date format

Note

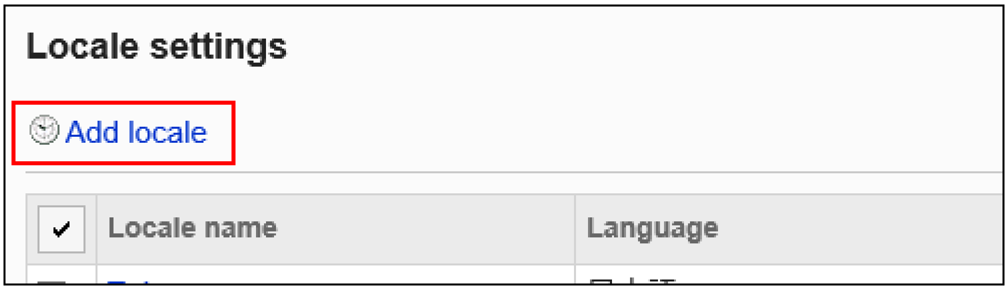
- The format set for the locale is not applied to the followings.
  - Year and month of the calendar used to select date
  - Date used to specify a period on the screen to add appointments or the search screen
  - Date and time items in CSV files

Adding Locales

You can add locales.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Localization".**
5. **Click "Locale Settings".**
6. **On the "Locale Settings" screen, click "Add a Locale".**



7. On the screen to add locales, enter the "Locale name" field.

You should set the default locale name.

Clicking "Add localized name" allows you to set locale names in multiple languages.

If you do not set the locale name in the user preference language, the default locale name is displayed.

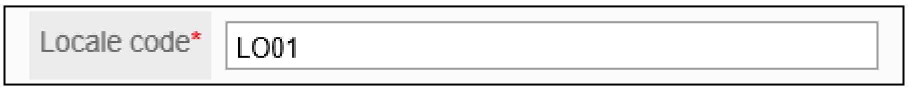
The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese
  Displayed in Traditional Chinese.

8. Enter the "Locale Code" field.

You should set this locale code.

This is a unique code for identifying a locale.



9. In the "Language" field, set the language that is displayed on the screen.

The following languages can be set:

- 日本語
- English
- Simplified Chinese

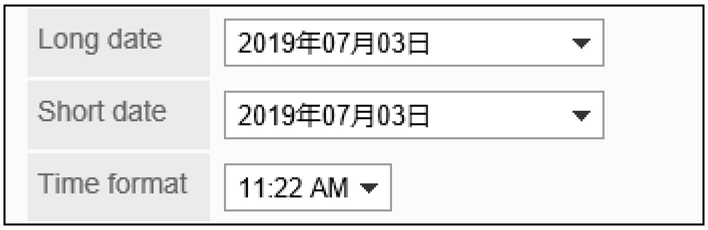
- Traditional Chinese

  Displayed in Traditional Chinese.
- Prioritize browser settings

10. Set the display format to be applied to dates and times, such as date of creation or date of update.

The setting fields are as follows:

- Long Date Format
- Short Date Format
- Time Format



11. Confirm your settings and click "Save".

Changing Locale Settings

You can change locale settings.

The changes are reflected in the personal settings of users. However, they are not applied to user-customized locales.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

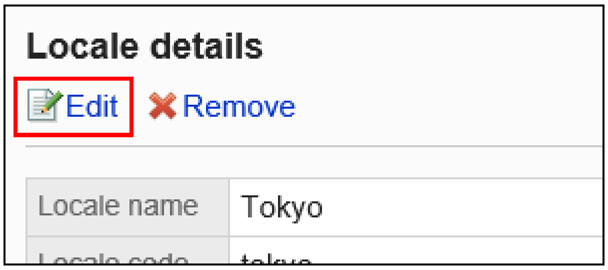
3. Select "Basic system administration" tab.

4. Click "Localization".

5. Click "Locale Settings".

6. **On the "Locale Settings" screen, click the locale name of the locale you want to change.**

7. **On the locale details screen, click "Edit".**



8. **On the screen to change locales, change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Deleting Locales

You can select locales and delete them.

If a user deletes an office, the user's office settings are inherited as "user-specific settings".

Caution

- Deleted locales cannot be restored.

Deleting Locales One by One

You can delete locales one by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

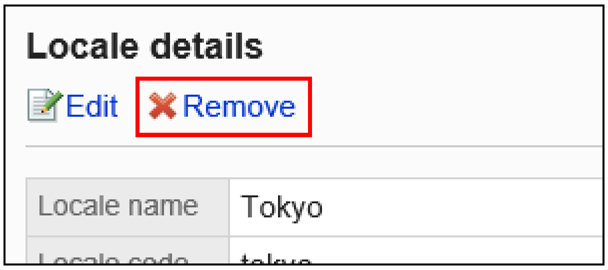
3. **Select "Basic system administration" tab.**

4. **Click "Localization".**

5. **Click "Locale Settings".**

6. **On the "Locale Settings" screen, click the locale name of the locale you want to delete.**

7. **On the locale details screen, click "Delete".**



8. **Click "Yes" on the screen to delete locales.**

Deleting Multiple Locales in Bulk

You can select locales you want to delete, and delete them all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Localization".**

5. **Click "Locale Settings".**

6. **On the "Locale Settings" screen, select the check boxes of the locales you want to delete, and then click "Delete".**

7. Click "Yes" on the screen to delete locales in bulk.

1.14. API

This section describes APIs that can be configured in Garoon.

If you want to make other systems linked with Garoon, refer to the topic on Integration (Garoon) in cybozu developer network.

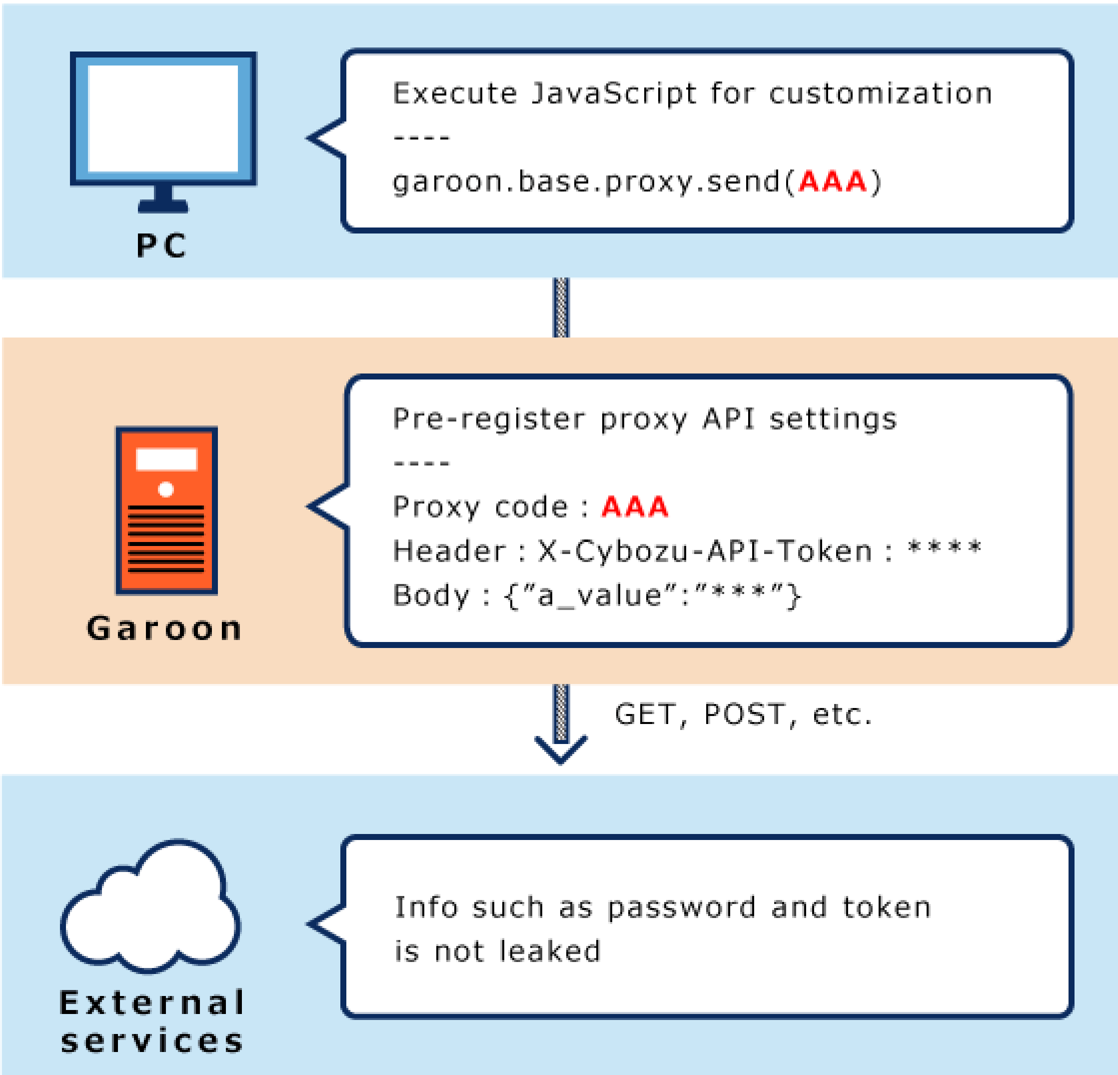
References

- To Add More Appointment Items
- Points to Check before Setting up the Proxy API(573Page)
- JavaScript and CSS customization(579Page)

1.14.1. Proxy API Settings

Proxy API Settings in Garoon is a feature that can be optionally used when using JavaScript customization.
By using the proxy API settings, you can send requests to external services from the JavaScript that you use for customization.

Image of Using Proxy API



Points to Check before Setting Proxy API

We recommend that you use the Garoon proxy API settings after you have prepared the JavaScript file for customization.
JavaScript customization is available in Garoon general screens or in the following applications.

- Portal HTML portlet
- Scheduler

- Messages
- E-mail[1]
- Workflow

[1]: Available in Garoon version 5.5.0 or later.

Before you customize them, be sure to check the precautions.

For details on the precautions for customization, refer to Points to Check before Customization(580Page).

Caution

- Cybozu shall not be liable for any loss or damage incurred by Customer due to Customer's setting of Garoon. Please use Garoon at Customer's own discretion and responsibility.
  For details, see the License Agreement.
- For details on the API specifications, contact the Garoon API support page from the inquiry form on the "Product site support".
- If you have difficulty developing programs such as JavaScript using APIs on your own, please contact Cybozu official partner.
  Partners can be searched in the partner list of the product site.

Adding Proxy API Settings

Add proxy API settings to Garoon.

Steps:

1. **Call garoon.base.proxy.send function in the JavaScript you customize.**

   For customization examples using parameters, request specifications, and proxy API settings, refer to [Garoon JavaScript API] how to connect Garoon Scheduler to Kintone on cybozu developer network.

2. **Click the Administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "API".**

6. **Click "Proxy API Settings".**

7. On the "Proxy API Settings" screen, click "Add".

8. On the "Add proxy configuration" screen, enter the "Proxy Code" field.

You must set the proxy code.

A proxy code used to call garoon.base.proxy.send function. The code should match the one specified with the function.

You can specify the proxy code in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered.

If the same proxy code already exists, an error occurs.

9. Set the "Method" field.

A HTTP method used to call garoon.base.proxy.send function. The method should match the one specified with the function.

The available methods are as follows:

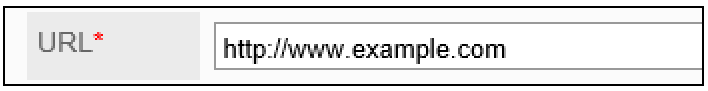
- GET
- POST
- PUT
- PATCH[1]
- DELETE

[1]: Available in Garoon version 5.9.0 or later.

10. Enter the "URL" field.

The URL is mandatory.

Enter the URL of the API to use. The URL must match the one specified in the function in forward matching.



11. **Set the "Parameter" field.**

Adds the information of the parameter to the point specified in the function.

When you use a GET request to send, the parameter set here can be added to it.

12. **Set the "Header" field.**

Adds the information of the header to the point specified in the function.

If the same header key exists in the function and the proxy API settings, the header key set in the proxy API settings overrides the one in function.

If the same header key exists in the proxy API settings, the last key specified overrides the preceding one.

13. **Set the "Body" field.**

This item is displayed when the "Method" field is POST, PUT, or PATCH.

For conditions where body information is added, refer to the topic on running external APIs in cybozu developer network.

14. **Select "Enabled" for "Status" field.**

15. **Confirm your settings and click "Add".**

Changing Proxy API Settings

Change the proxy API settings.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

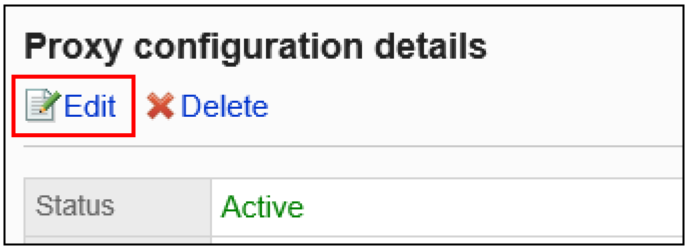
3. **Select "Basic system administration" tab.**

4. **Click "API".**

5. **Click "Proxy API Settings".**

6. **On the "Proxy API Settings" screen, click the proxy code for the proxy API to change.**

7. **On the "Proxy configuration details" screen, click "Edit".**



8. **On the "Edit proxy configuration" screen, change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Deleting Proxy API Settings

Delete proxy API settings.

Caution

- After deleting proxy API settings, they cannot be restored.

Deleting Proxy API Settings One by One

Delete the proxy API settings one one by one.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "API".**

5. **Click "Proxy API Settings".**

6. **On the "Proxy API Settings" screen, select the proxy code for the proxy API to delete.**

7. **On the "Proxy configuration details" screen, click "Delete".**

8. **Click "Yes" on the "Delete proxy configuration" screen.**

Deleting Multiple Proxy API Settings in Bulk

Select multiple proxy API settings and delete them in bulk.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

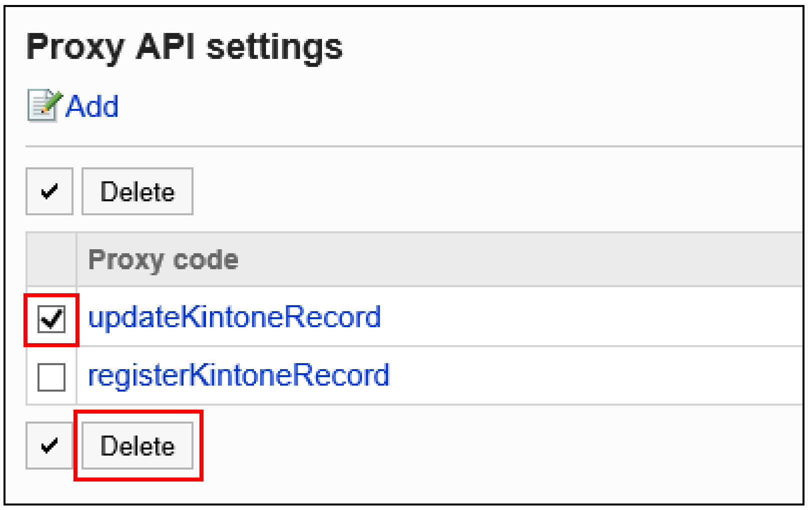
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "API".**

5. **Click "Proxy API Settings".**

6. **On "Proxy API Settings" screen, select check boxes of proxy API to delete and click "Delete".**



7. Click "Yes" on the "Delete proxy configurations" screen.

1.15. JavaScript and CSS Customization

You can use JavaScript files and CSS files to customize the entire Garoon screens or the screens for the following applications:

- Portal
- Scheduler
- Messages
- E-mail[1]
- Workflow

[1]: Available in Garoon version 5.5.0 or later.

Caution

- To use the customization, you must have a valid renewed service license.
  Even if you have set up customizations within the license period, the customizations are disabled and cannot be used after the license expires.
  For details on the license, see about the service license on the product site.

Note

- If you want to use Javascripts customization to call images, you can use Garoon image assets(1651Page).

References

- Points to Check before Customization(580Page)
- Garoon General Customization(584Page)
- Portal Customization(592Page)
- Scheduler Customization(595Page)
- Message Customization(603Page)

- E-mail Customization(612Page)
- Workflow Customization(620Page)

1.15.1. Points to Check before Customization

This section describes items that must be checked before customization.

Before Setting Up

- The customization function is available only for PC view.
  Smartphone view and KUNAI are not supported.
- To create a program using JavaScript, use the API.
  For details on API specifications and the way to use it, refer to the instruction page on cybozu developer network.
- For details on the API specifications, contact the Garoon API support page from the inquiry form on the "Product site support".
- If you have difficulty developing programs such as JavaScript using APIs on your own, please contact Cybozu official partner.
  Partners can be searched in the partner list of the product site.

Disclaimer

- Cybozu shall not be liable for any impacts on performance or damages caused by customization.
  Customers shall take responsibility for any customizations by loading JavaScript files or CSS files.
  Be noted that Cybozu shall not take responsibility to support such a customized function.
  For details, see Cybozu Garoon 5 service agreement.
- Cybozu does not offer any customization services, regardless of whether with or without charge. Please understand this.
- Cybozu may suspend the provision of the services and Garoon if the customizations by loading JavaScript files or CSS files caused significant loads or damages on cybozu.com service.
  Customers must fully understand the instructions on customization and thoroughly prepared for it.
- The JavaScript and CSS may cause errors at loading in case if you have processed DOM operations, or have used the JavaScript libraries used by Garoon and Garoon is updated after that.

Customers must ensure that the customization works correctly and modify it as needed, then reload the modified JavaScript files or CSS files at Garoon updates.
- The copyrights of Cybozu products belong to Cybozu, Inc.

Introduction to Customization Examples

The customization examples are introduced in the product site and the cybozu developer network page. For details, refer to the following section:

- cybozu developer network:
  Garoon REST API List
  Garoon JavaScript API List
  Garoon JavaScript Coding Guidelines
  Customization (Garoon)
  Samples and utilization tips are introduced.
- Product Site:
  Customization

Screens Applicable to Customizations

This section describes screens where customized items are applied.
However, the screens to which the customizations are applied may differ depending on the functions of the API you use.

For Overall Garoon

Customized items are applied to user interfaces in PC view.
Costomizations does not apply to the following screens:

- System administration screens
- Operational Administration Screen
- Personal Settings Screen
- Login screen
- Pop-up window

For Portals

The portal can be customized only for HTML portlets.
Customized items are applied to the following screens:

- The portal page with HTML portlets
- Preview screens displayed from the System Administration screens or from the Operational Administration screen
- My Portal preview screens displayed from Personal Settings screen

For Scheduler

The customized items are applied to the following screens in the scheduler:
Only the preview screen allows you to view the customized results from the portal and My Portal Settings screen.
The customized results are not shown on the "Portal Details" screen and the "My Portal Details" screen.

- Group Day view
- Group Week view
- Day view
- Week view
- Month view
- "New appointment" screen
- Change appointment screen
- Appointment Details screen
- The portal page with the following portlets:
  - Scheduler (Group Day view)
  - Scheduler (Group Week view)
  - Scheduler (Day view)
  - Scheduler (Week view)
  - Scheduler (Month view)
- Portal Preview screen displayed from the System administration screen
- My Portal preview screens displayed from Personal Settings screen

Customizations may not apply to the the following appointments depending on the function of the API you use:

- Tentative appointments
- Appointments added using a pop-up window displayed on the "Scheduler" screen

For Messages

The customized items are applied to the following screens in the message:

- Create Messages screen
- Reuse messages screen
- Change Message Recipients screen

- "Edit/send draft" screen[1]

[1]: Applies to Garoon version 5.9.0 or later.

For E-mails

The E-mail Customization function is available in Garoon version 5.5.0 or later.
The customized items are applied to the following screens in the E-mail:

- "Compose E-mail" screen
- "Reply E-mail" screen
- "Reply E-mail to all" screen
- "Forward E-mail" screen
- "Resend E-mail" screen
- "Edit/send draft" screen

For Workflows

The customized items are applied to the following screens in the workflow:

- Request details screen
- Applicant screen
- Approver screen
- Acknowledger screen
- Print screen
- Preview screens displayed from the System Administration screens or from the Operational Administration screen

Priority in Customizations

The JavaScript files and the CSS files are imported in the following order:

- JavaScript files and CSS files for Garoon products
- JavaScript files and CSS files configured in Garoon General Customization function
- JavaScript files and CSS files that are set in the customization function of each application

1.15.2. Garoon General Customization

This section describes how to customize the entire Garoon using JavaScript files and CSS files.
The JavaScript files and CSS files you apply here affect the user interfaces in PC view.
The customizations are not applied to the following screens:

- System administration screens
- Operational Administration Screen
- Personal Settings Screen
- Login screen
- Pop-up window

We recommend that you customize the following applications using the administrative screens of each application:

- Portal Customization(592Page)
- Scheduler Customization(595Page)
- Message Customization(603Page)
- Workflow Customization(620Page)

Caution

- It is recommended that you specify the references to JavaScript files and CSS files in URL.
  If you specify them in file format, the data containing the file are also accessed when the Garoon data is accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Adding Customization Group

Add a customization group for each target or purpose of the customization.
Set the following information to customization groups:

- Users, organizations, or roles for which you want to apply customizations
- JavaScript files required for customization
- CSS files required for customization

Steps:

1. **You can prepare JavaScript files and CSS files yourself.**

2. **Click the administration menu icon (gear icon) in the header.**

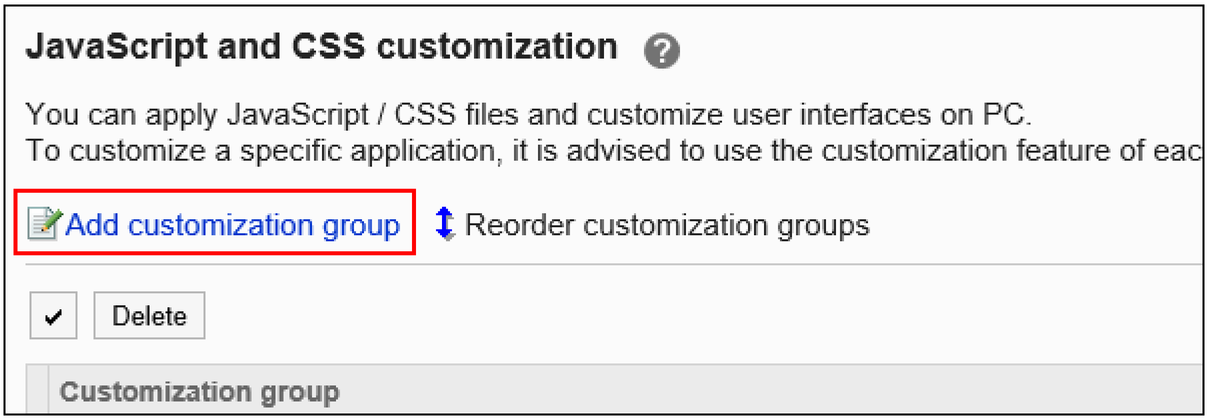
3. **Click "System settings".**

4. **Select "Basic system administration" tab.**

5. **Click "Customize".**

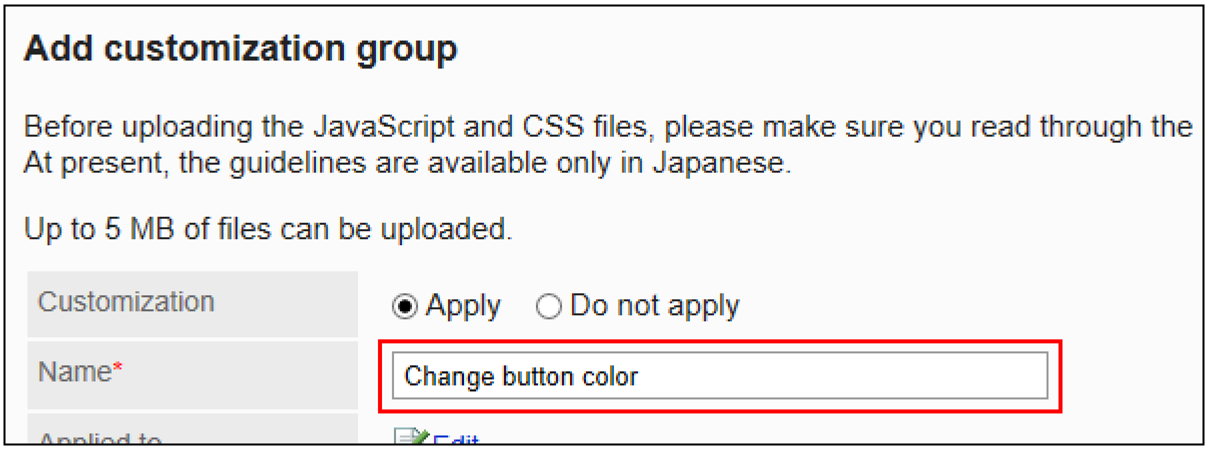
6. **Click "JavaScript and CSS customization".**

7. **On the "JavaScript and CSS customization" screen, click "Add customization group".**



8. **On the "Add Customization Group" screen, enter the "Customization Group name" field.**

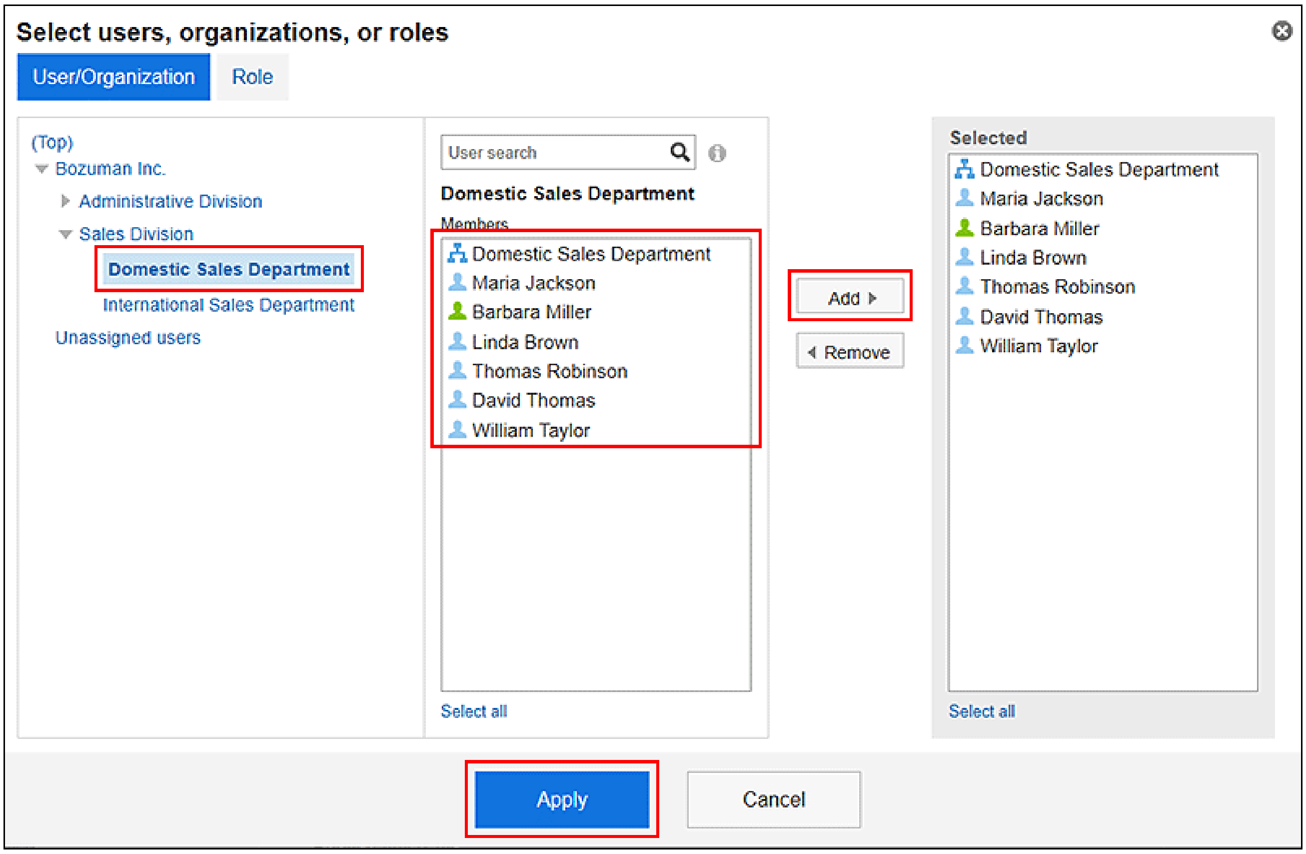
You should set the name of the customization group.



9. **In the "Applied to" field, click "Edit" and select the target for which you want to apply the customization.**

Select the target from the user, organization, or role. By default, the logged-in user has been set for the target.

The targets display in the order set automatically. Cannot change.



10. **In the "JavaScript customization" field, set the JavaScript file you want to apply.**

You can add up to 30 files or links.

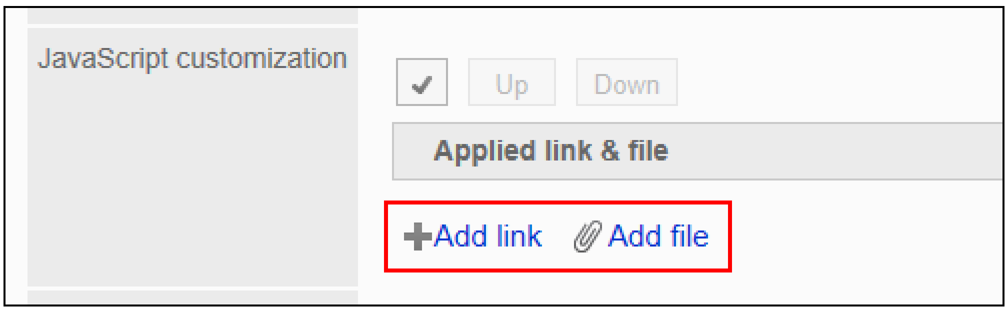
- File:

  Only files with a file extension of ".js" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

  Specify a URL starting with "https://" in up to 512 characters.



11. **In the "CSS customization" field, set the CSS file you want to apply.**

You can add up to 30 files or links.

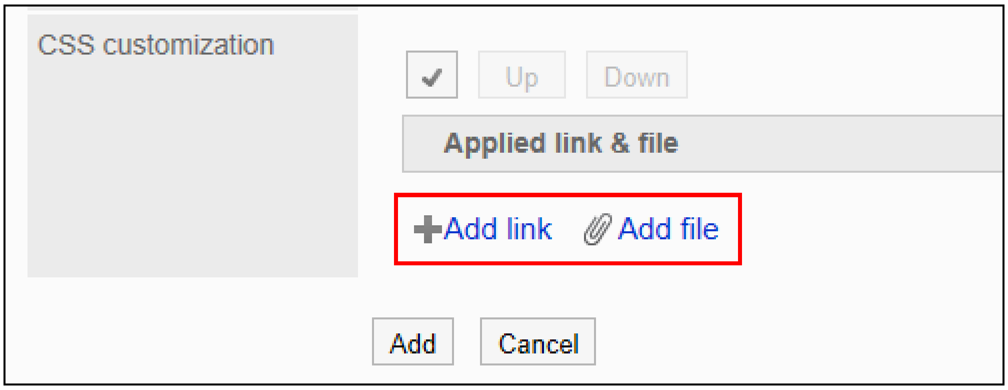
- File:

  Only files with a file extension of ".css" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

  Specify a URL starting with "https://" in up to 512 characters.

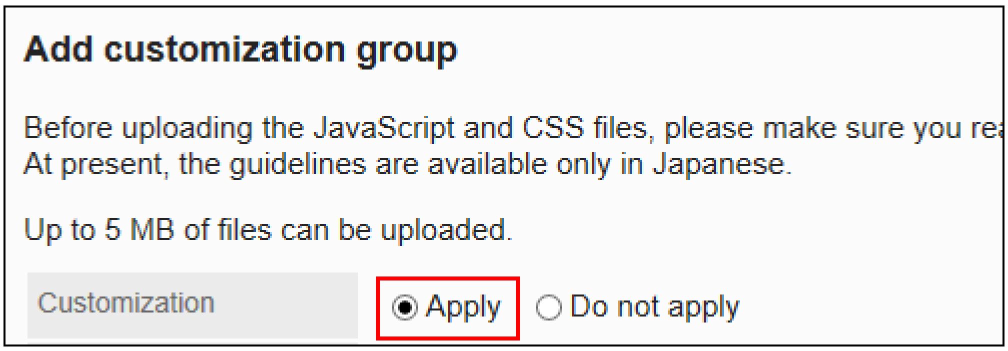


12. You can change the order of the files and links as needed.

JavaScript files run from top to bottom.

Select the check boxes for the files and links you want to reorder, and then click "Move Up" or "Move Down".

13. In the "Customization" field, select "Apply".



14. **Confirm your settings and click "Add".**

15. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Changing Customization Groups

Change the settings in the customization group.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

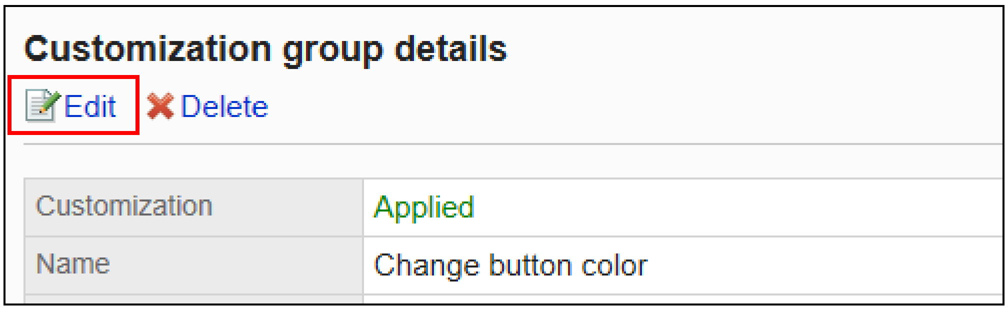
3. **Select "Basic system administration" tab.**

4. **Click "Customize".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to change.**

7. **On the "Customization group details" screen, click "Edit".**



8. **On the "Edit customization group" screen, set the required items.**

9. **Confirm your settings and click "Save".**

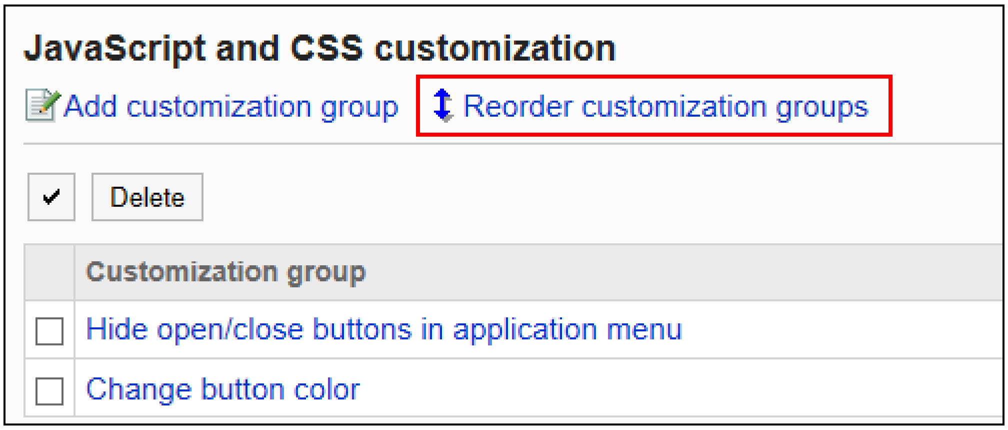
10. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Reordering Customization Groups

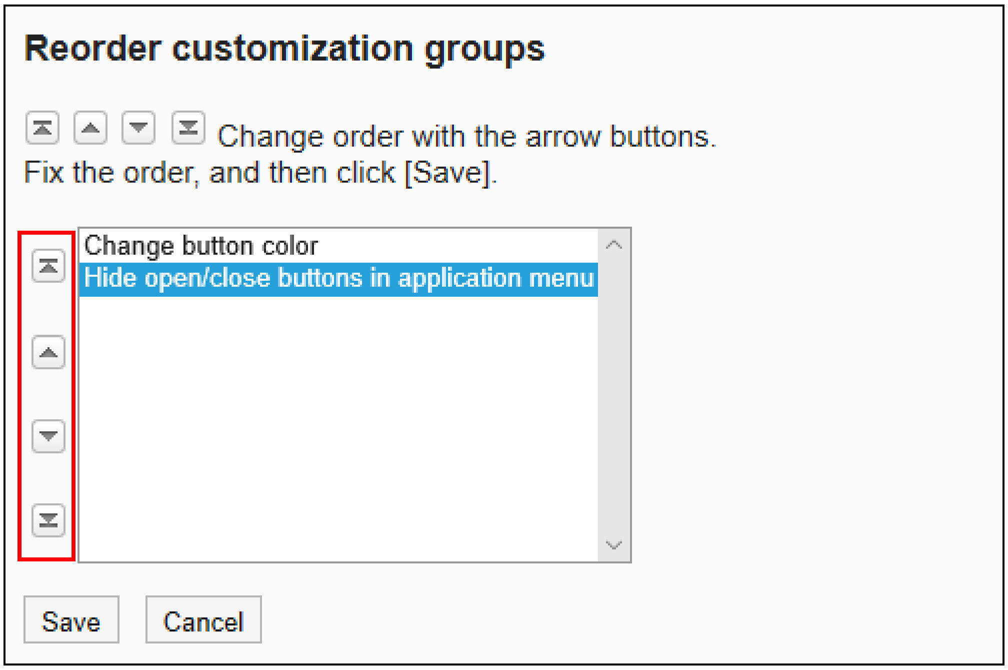
Reorder the customization groups.
The JavaScript file and the CSS file are imported from top to bottom in the order appearing in "JavaScript and CSS customization" screen.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Basic system administration" tab.**
4. **Click "Customize".**
5. **Click "JavaScript and CSS customization".**
6. **On the "JavaScript and CSS customization" screen, click "Reorder Customization Groups".**



7. **On the "Reorder Customization Groups" screen, reorder the customization groups.**



8. **Confirm your settings and click "Save".**

9. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Deleting Customization Groups

Delete customization groups.

If you delete a customization group, its settings are disabled.

Caution

- After deleting customization groups, they cannot be restored.

Deleting Customization Groups One by One

Delete customization groups one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

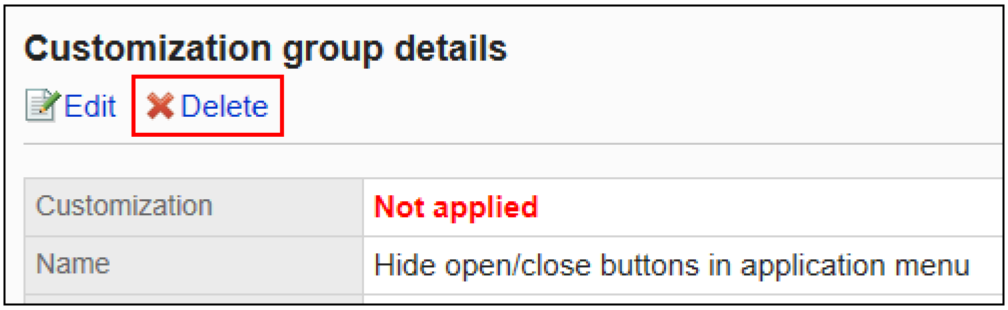
3. **Select "Basic system administration" tab.**

4. **Click "Customize".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to delete.**

7. **On the "Customization group details" screen, click "Delete".**



8. **Click "Yes" on the "Delete customization group" screen.**

Deleting Multiple Customization Groups in Bulk

Delete multiple customization groups by selecting them at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

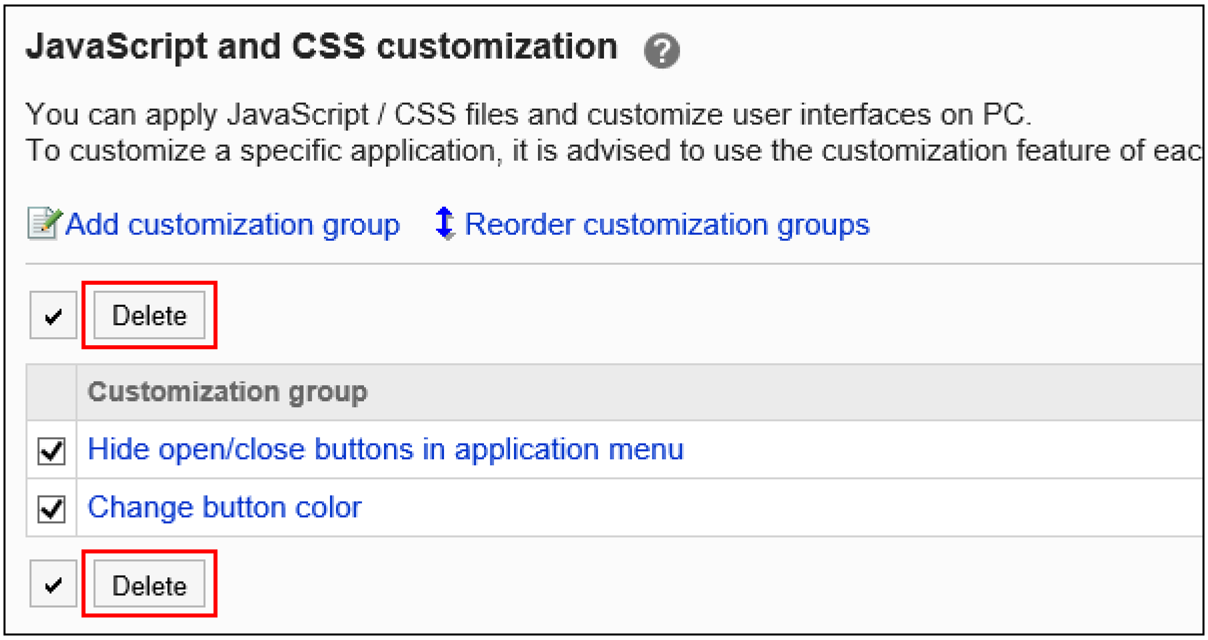
2. **Click "System settings".**

3. **Select "Basic system administration" tab.**

4. **Click "Customize".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, select the checkbox of the customization group to delete, then click "Delete".**



7. **Click "Yes" on the "Delete customization groups" screen.**

1.15.3. Portal Customization

This section describes how to customize the portal.

The portal can be customized only for HTML portlets. Before you customize, prepare the HTML portlets to which you apply the customizations.

For details, refer to Adding HTML Portlets(693Page).

Caution

- It is recommended that you specify the references to JavaScript files and CSS files in URL.
  If you specify them in file format, the data containing the file are also accessed when the Garoon data is accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Steps:

1. **You can prepare JavaScript files and CSS files yourself.**

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

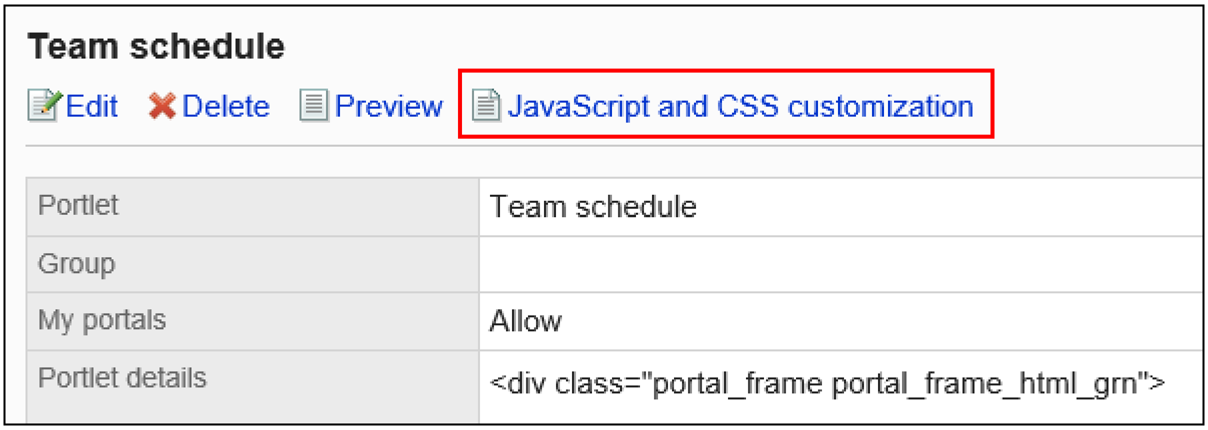
4. **Select "Application settings" tab.**

5. **Click Portal.**

6. **Click "HTML portlet".**

7. **On the "HTML portlet" screen, select the portlet name of the HTML portlet to which you apply the JavaScript files or CSS files.**

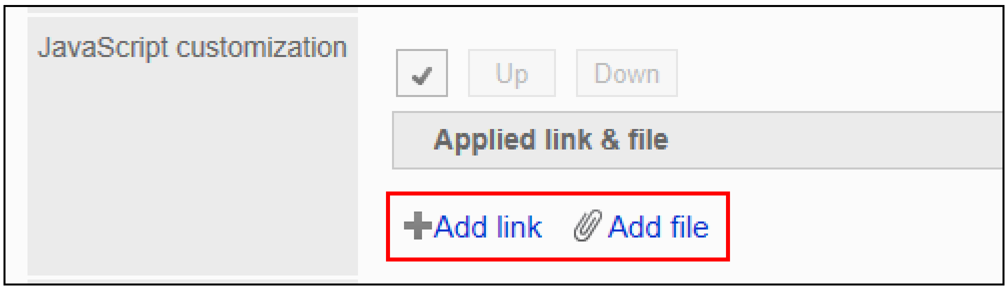
8. **On the Details screen of HTML portlet, click "JavaScript and CSS customization".**



9. **In the "JavaScript customization" field on the "JavaScript and CSS customization" screen, set the JavaScript file to apply.**

You can add up to 30 files or links.

- File:
  Only files with a file extension of ".js" can be added.
  Up to 5 MB of files can be uploaded.
- Link:
  Specify a URL starting with "https://" in up to 512 characters.



10. **In the "CSS customization" field, set the CSS file you want to apply.**

You can add up to 30 files or links.

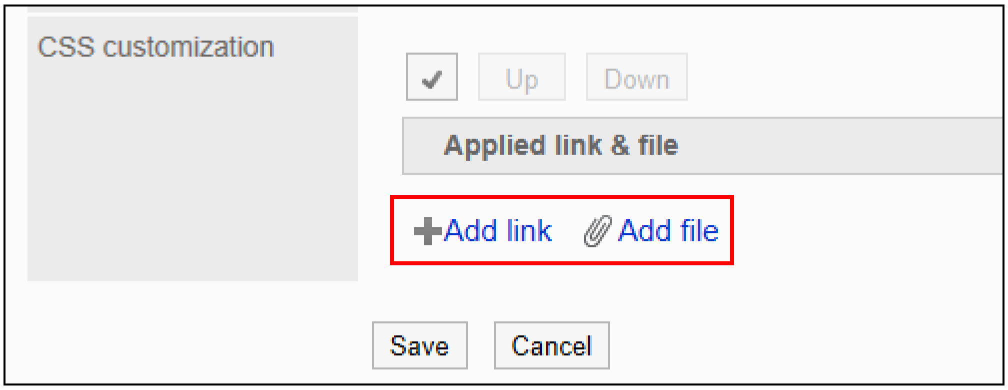
- File:

  Only files with a file extension of ".css" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

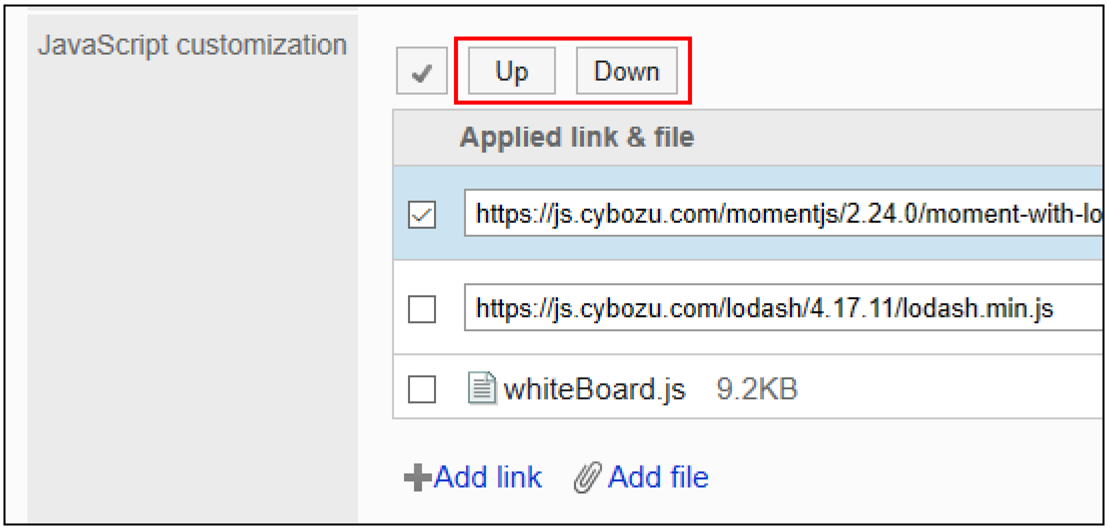
  Specify a URL starting with "https://" in up to 512 characters.



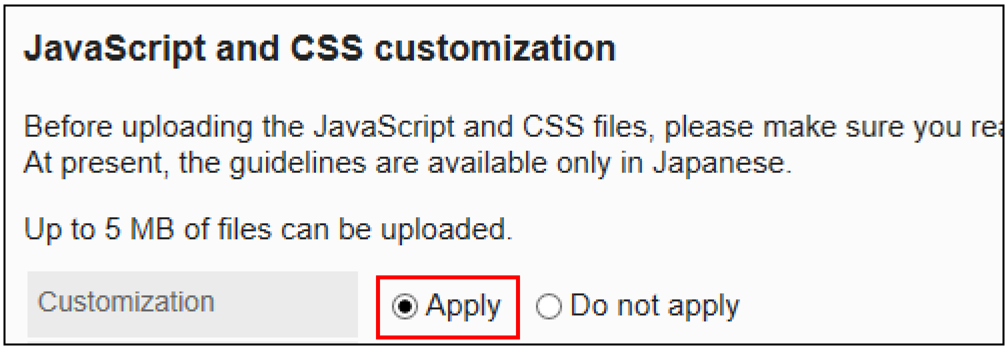
11. You can change the order of the files and links as needed.

JavaScript files run from top to bottom.

Select the check boxes for the files and links you want to reorder, and then click "Move Up" or "Move Down".



12. In the "Customization" field, select "Apply".



13. Confirm your settings and click "Add".

14. On the screen where the customizations are applied, confirm that the design and item functions are fine.

1.15.4. Scheduler Customization

This section describes how to customize scheduler using JavaScript files and CSS files.

Caution

- It is recommended that you specify the references to JavaScript files and CSS files in URL.
  If you specify them in file format, the data containing the file are also accessed when the Garoon data is accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Adding Customization Group

Add a customization group for each target or purpose of the customization.
Set the following information to customization groups:

- Users, organizations, or roles for which you want to apply customizations
- JavaScript files required for customization
- CSS files required for customization

Steps:

1. **You can prepare JavaScript files and CSS files yourself.**

2. **Click the administration menu icon (gear icon) in the header.**

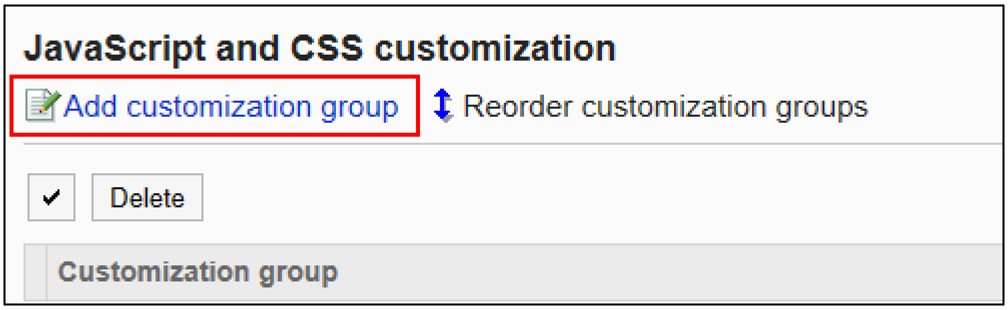
3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Scheduler".**

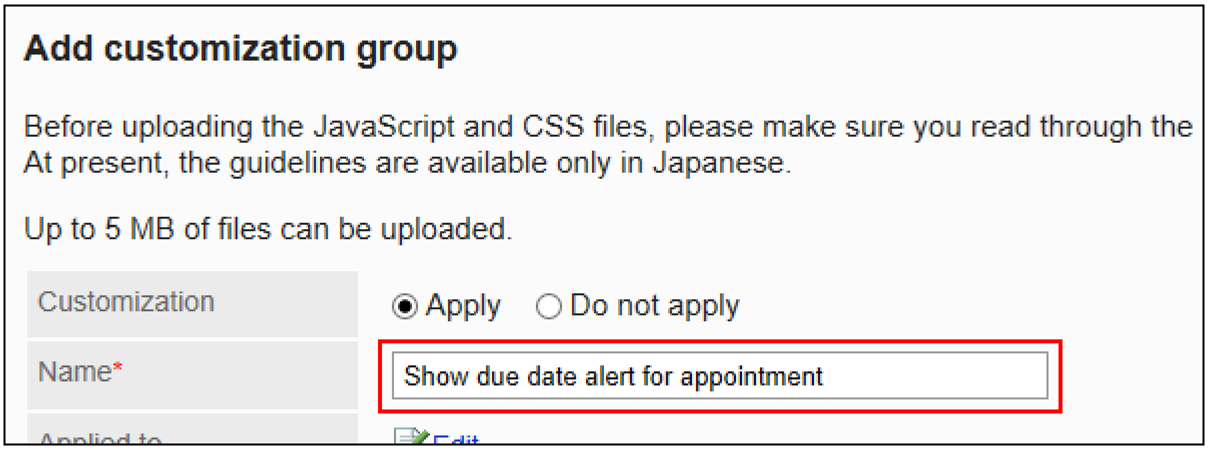
6. **Click "JavaScript and CSS customization".**

7. **On the "JavaScript and CSS customization" screen, click "Add customization group".**



8. **On the "Add Customization Group" screen, enter the "Customization Group name" field.**

You should set the name of the customization group.



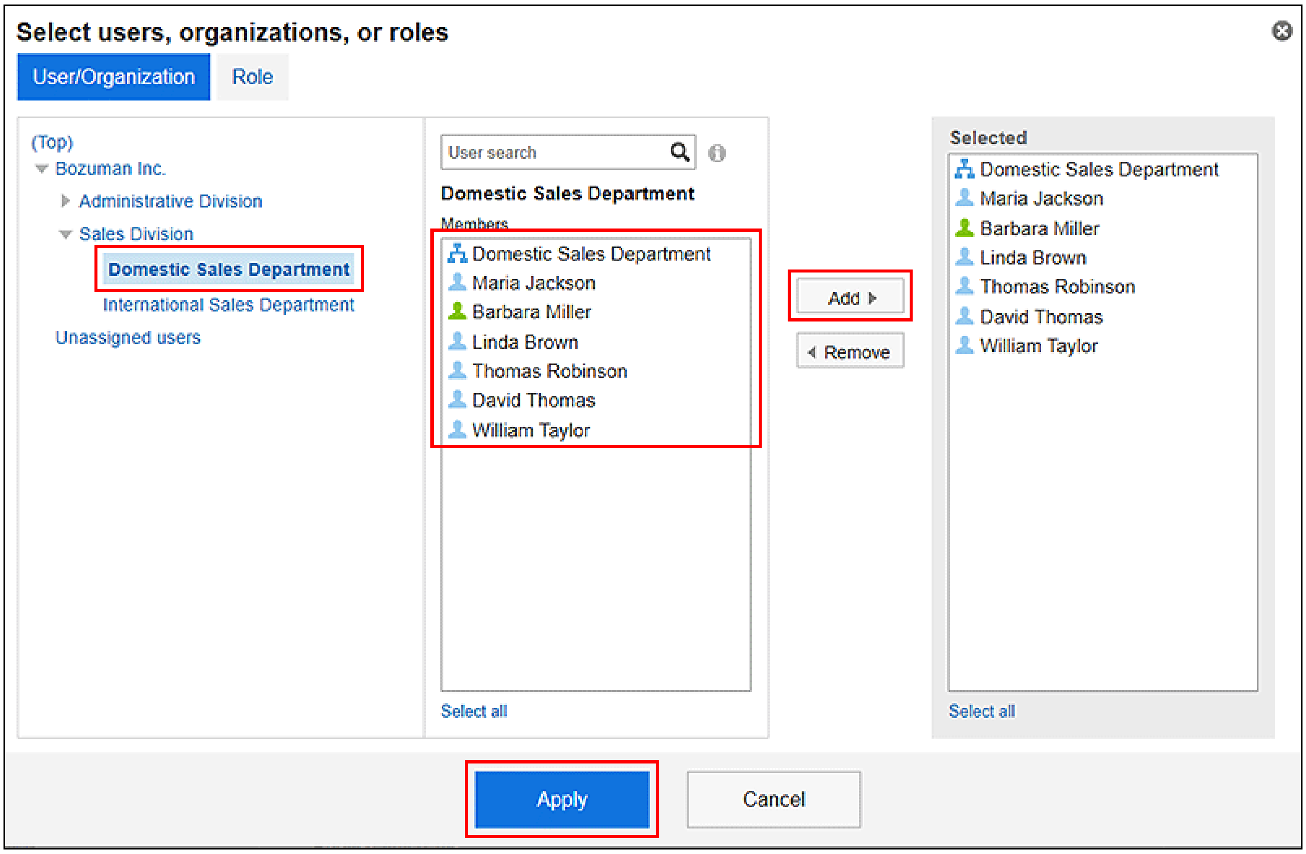
9. **In the "Applied to" field, click "Edit" and select the target for which you want to apply the customization.**

Select the target from the user, organization, or role. By default, the logged-in user has been set for the target.

You also can select users who are not allowed to use Scheduler. Selecting such users does not cause an error.

However, customizations are not applied to users who are not allowed to use Scheduler.

The targets display in the order set automatically. Cannot change.



10. In the "JavaScript customization" field, set the JavaScript file you want to apply.

You can add up to 30 files or links.

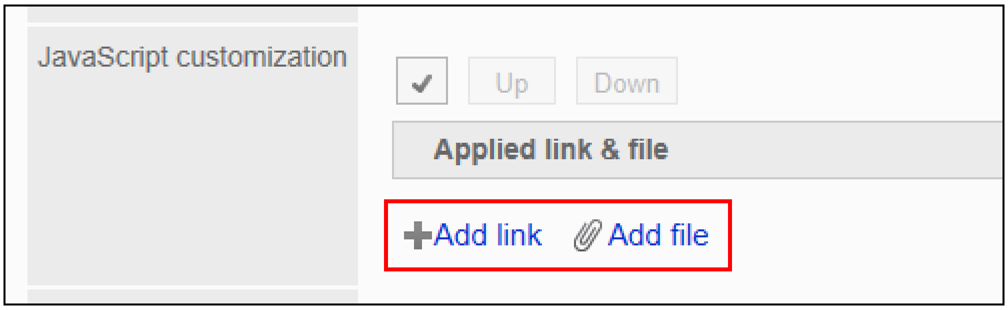
- File:

  Only files with a file extension of ".js" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

  Specify a URL starting with "https://" in up to 512 characters.



11. **In the "CSS customization" field, set the CSS file you want to apply.**

You can add up to 30 files or links.

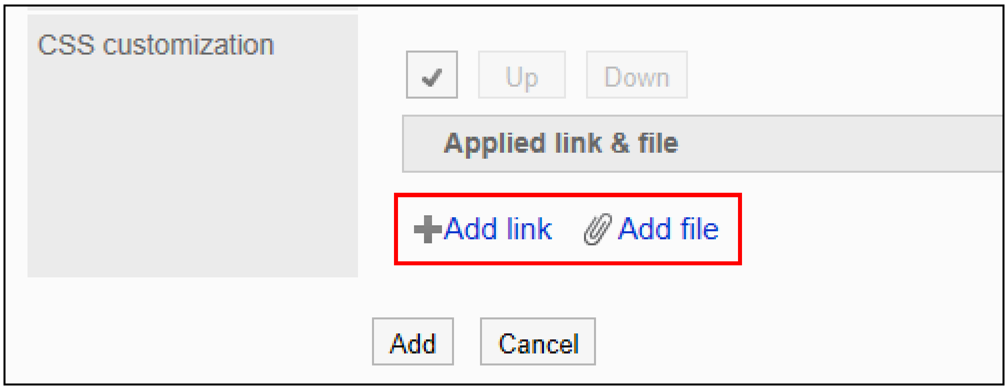
- File:

  Only files with a file extension of ".css" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

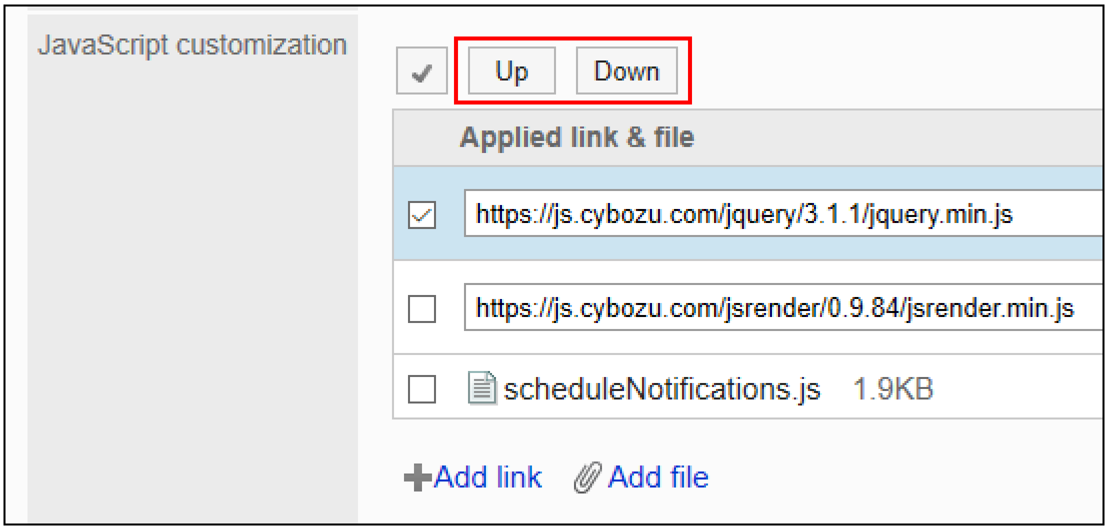
  Specify a URL starting with "https://" in up to 512 characters.



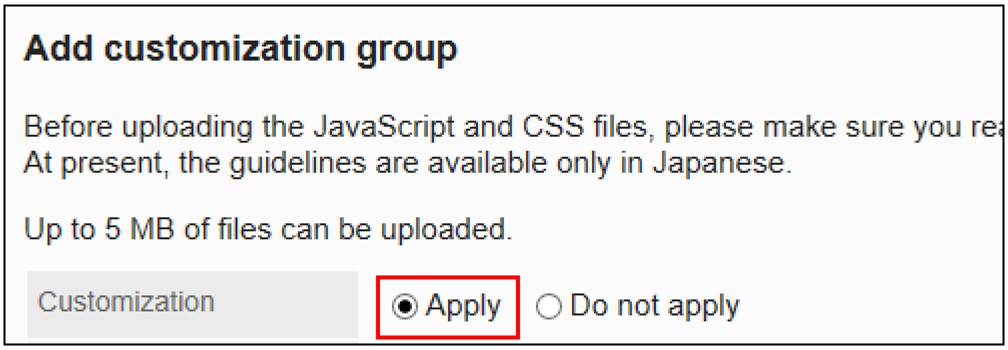
12. **You can change the order of the files and links as needed.**

JavaScript files run from top to bottom.

Select the check boxes for the files and links you want to reorder, and then click "Move Up" or "Move Down".



13. In the "Customization" field, select "Apply".



14. Confirm your settings and click "Add".

15. On the screen where the customizations are applied, confirm that the design and item functions are fine.

Changing Customization Groups

Change the settings in the customization group.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

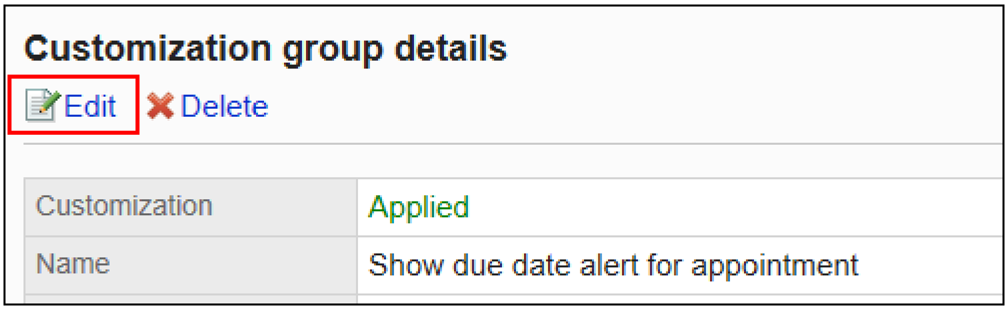
3. Select "Application settings" tab.

4. Click "Scheduler".

5. Click "JavaScript and CSS customization".

6. On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to change.

7. On the "Customization group details" screen, click "Edit".



8. **On the "Edit customization group" screen, set the required items.**

9. **Confirm your settings and click "Save".**

10. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Reordering Customization Groups

Reorder the customization groups.
The JavaScript file and the CSS file are imported from top to bottom in the order appearing in "JavaScript and CSS customization" screen.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

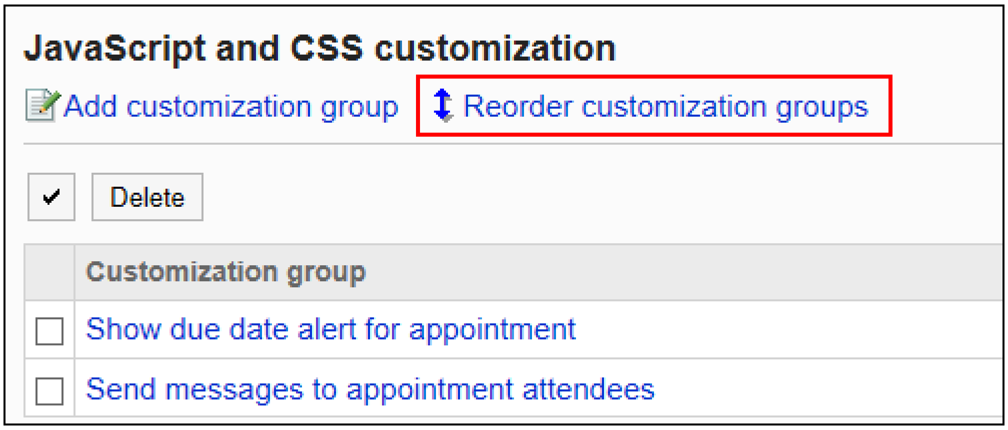
2. **Click "System settings".**

3. **Select "Application settings" tab.**

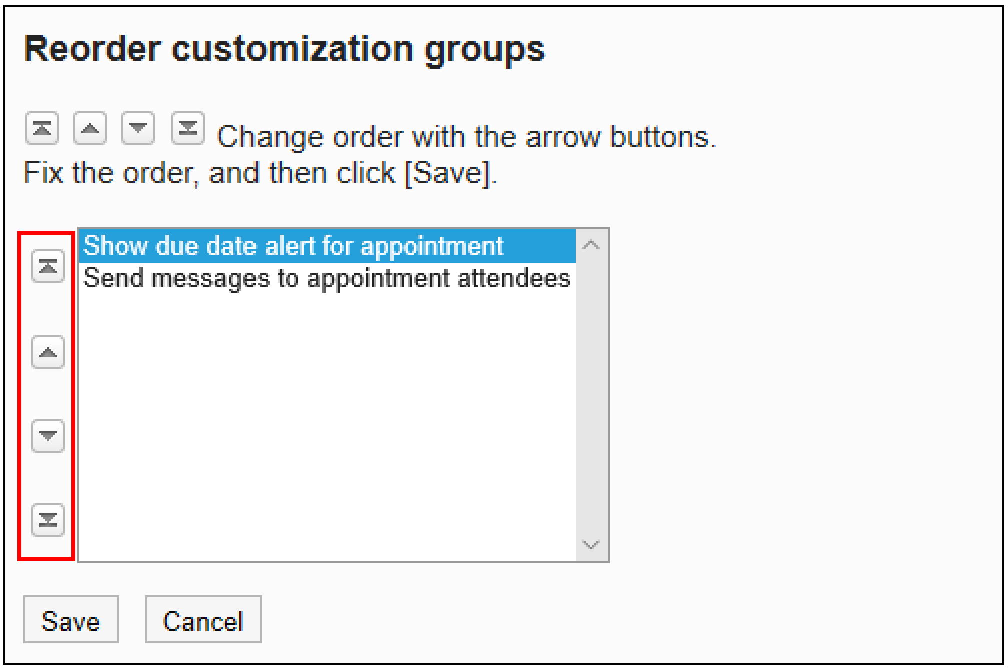
4. **Click "Scheduler".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, click "Reorder Customization Groups".**



7. **On the "Reorder Customization Groups" screen, reorder the customization groups.**



8. **Confirm your settings and click "Save".**

9. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Deleting Customization Groups

Delete customization groups.

If you delete a customization group, its settings are disabled.

Caution

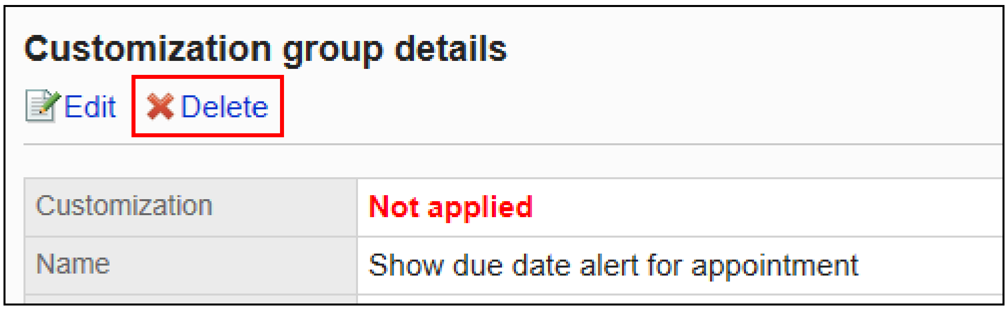
- After deleting customization groups, they cannot be restored.

Deleting Customization Groups One by One

Delete customization groups one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "JavaScript and CSS customization".**
6. **On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to delete.**
7. **On the "Customization group details" screen, click "Delete".**



8. **Click "Yes" on the "Delete customization group" screen.**

Deleting Multiple Customization Groups in Bulk

Delete multiple customization groups by selecting them at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

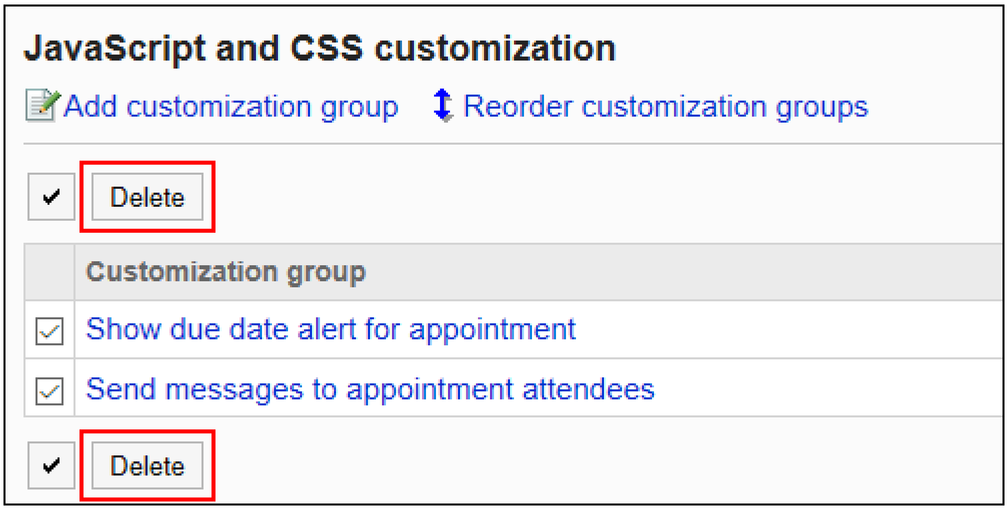
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, select the checkbox of the customization group to delete, then click "Delete".**



7. **Click "Yes" on the "Delete customization groups" screen.**

1.15.5. Message Customization

This section describes how to customize messages using JavaScript files and CSS files.

Caution

- It is recommended that you specify the references to JavaScript files and CSS files in URL.
  If you specify them in file format, the data containing the file are also accessed when the Garoon data is

accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Adding Customization Group

Add a customization group for each target or purpose of the customization.
Set the following information to customization groups:

- Users, organizations, or roles for which you want to apply customizations
- JavaScript files required for customization
- CSS files required for customization

Steps:

1. **You can prepare JavaScript files and CSS files yourself.**

2. **Click the administration menu icon (gear icon) in the header.**

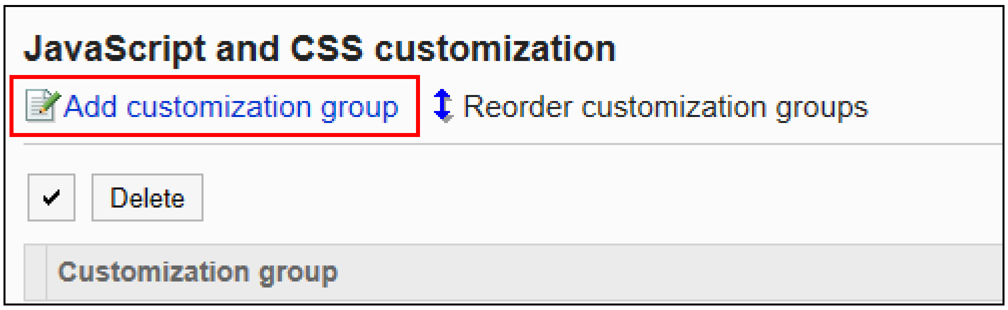
3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Messages".**

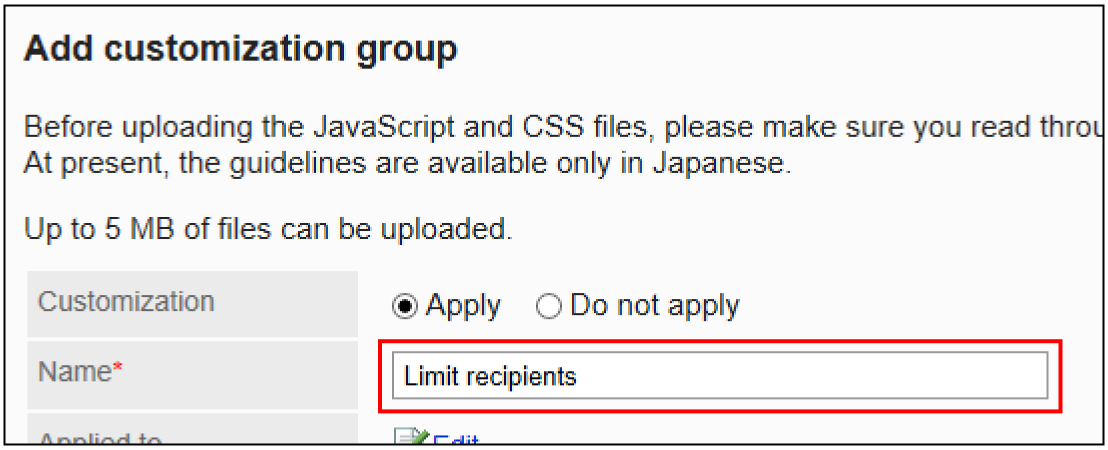
6. **Click "JavaScript and CSS customization".**

7. **On the "JavaScript and CSS customization" screen, click "Add customization group".**



8. **On the "Add Customization Group" screen, enter the "Customization Group name" field.**

You should set the name of the customization group.



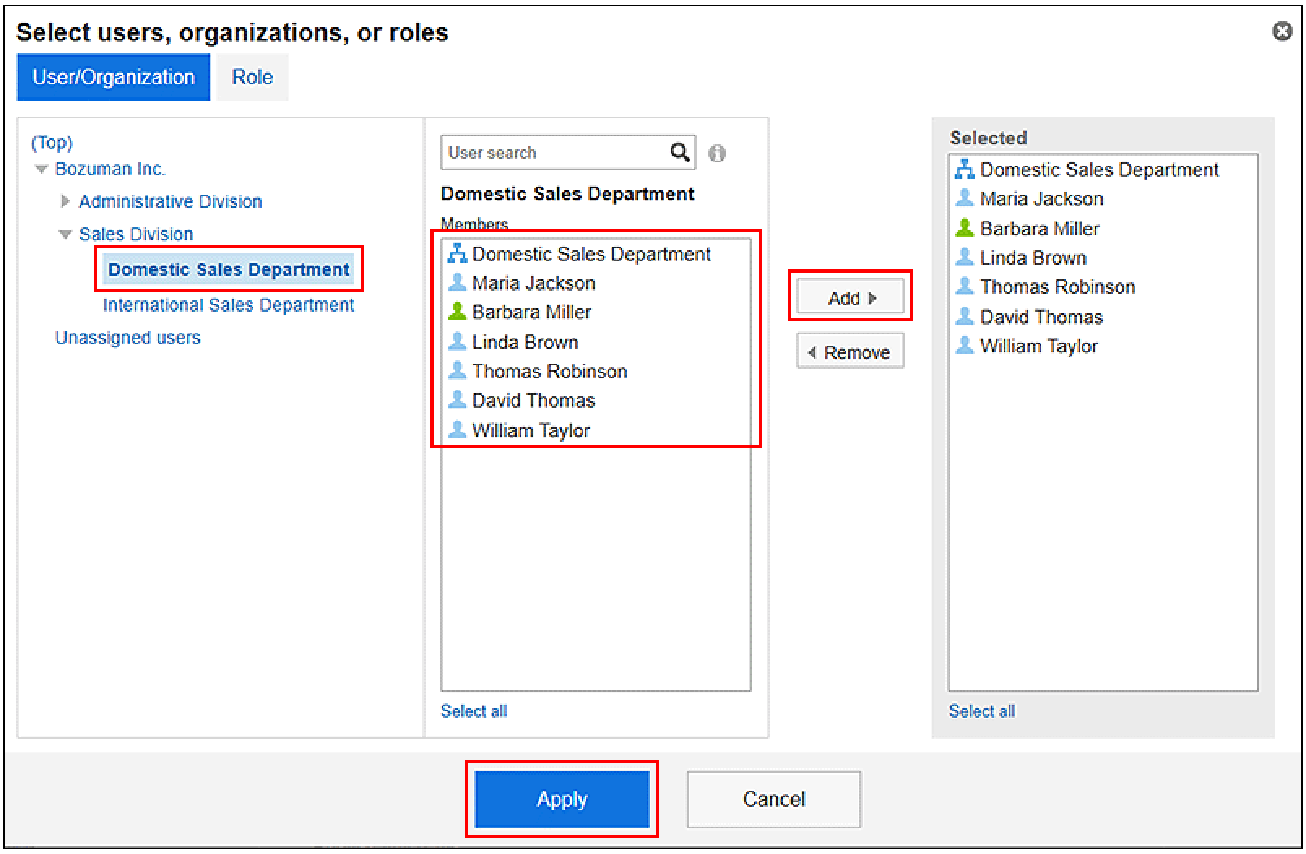
9. **In the "Applied to" field, click "Edit" and select the target for which you want to apply the customization.**

Select the target from the user, organization, or role. By default, the logged-in user has been set for the target.

You also can select users who are not allowed to use Messages. Selecting such users does not cause an error.

However, customizations are not applied to users who are not allowed to use Messages.

The targets display in the order set automatically. Cannot change.



10. **In the "JavaScript customization" field, set the JavaScript file you want to apply.**

You can add up to 30 files or links.

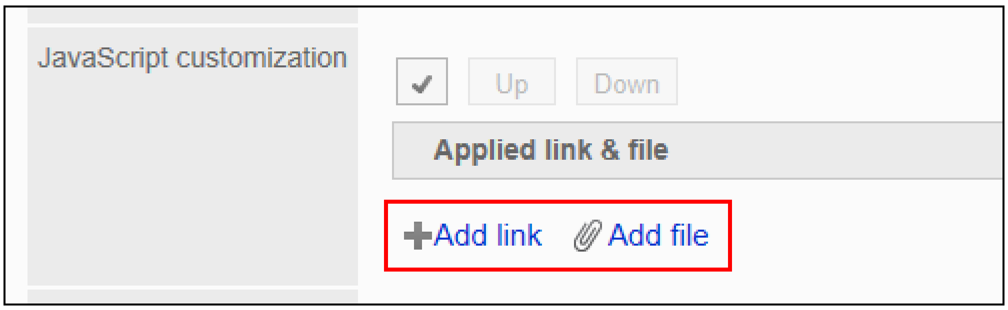
- File:

  Only files with a file extension of ".js" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

  Specify a URL starting with "https://" in up to 512 characters.



11. **In the "CSS customization" field, set the CSS file you want to apply.**

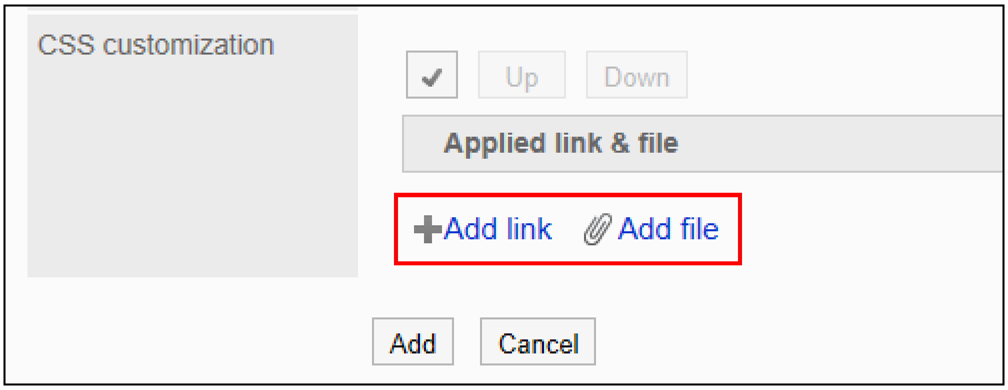
You can add up to 30 files or links.

- File:

  Only files with a file extension of ".css" can be added.

  Up to 5 MB of files can be uploaded.

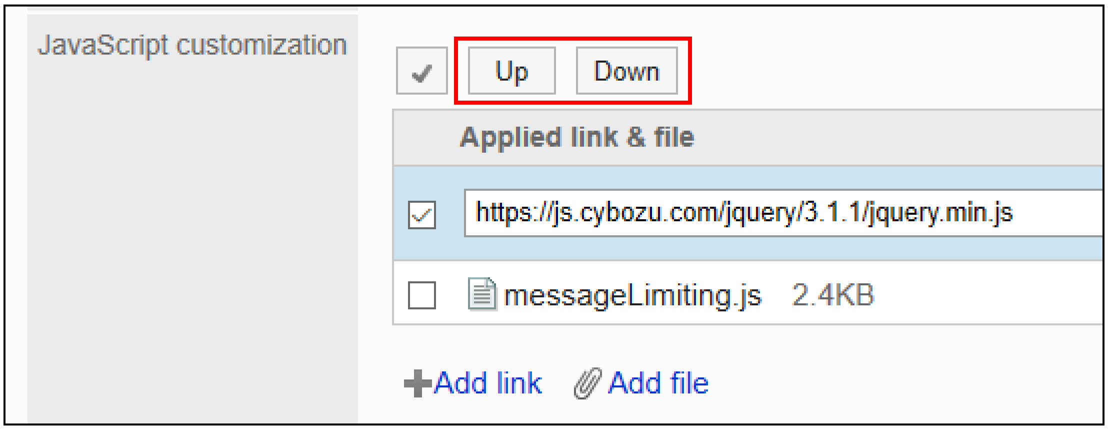
- Link:
  Specify a URL starting with "https://" in up to 512 characters.



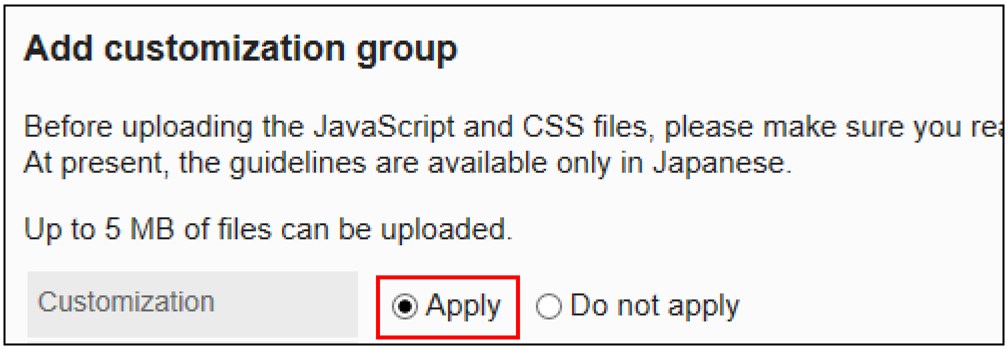
12. You can change the order of the files and links as needed.

JavaScript files run from top to bottom.

Select the check boxes for the files and links you want to reorder, and then click "Move Up" or "Move Down".



13. In the "Customization" field, select "Apply".



14. Confirm your settings and click "Add".

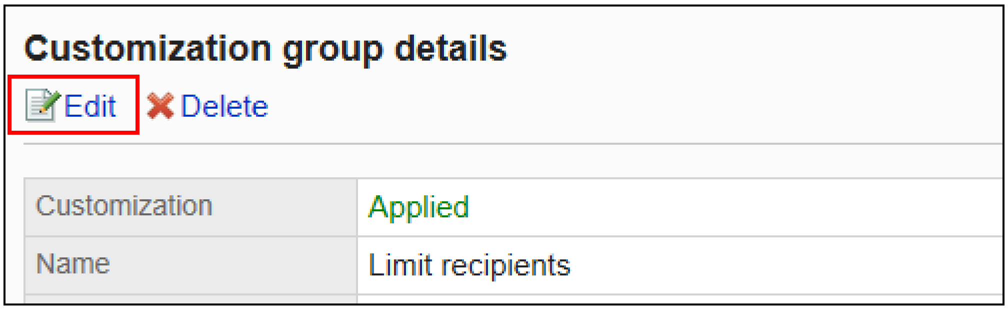
15. On the screen where the customizations are applied, confirm that the design and item functions are fine.

Changing Customization Groups

Change the settings in the customization group.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Messages".**
5. **Click "JavaScript and CSS customization".**
6. **On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to change.**
7. **On the "Customization group details" screen, click "Edit".**



8. **On the "Edit customization group" screen, set the required items.**
9. **Confirm your settings and click "Save".**
10. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Reordering Customization Groups

Reorder the customization groups.
The JavaScript file and the CSS file are imported from top to bottom in the order appearing in "JavaScript and CSS customization" screen.

Steps:

1. Click the administration menu icon (gear icon) in the header.

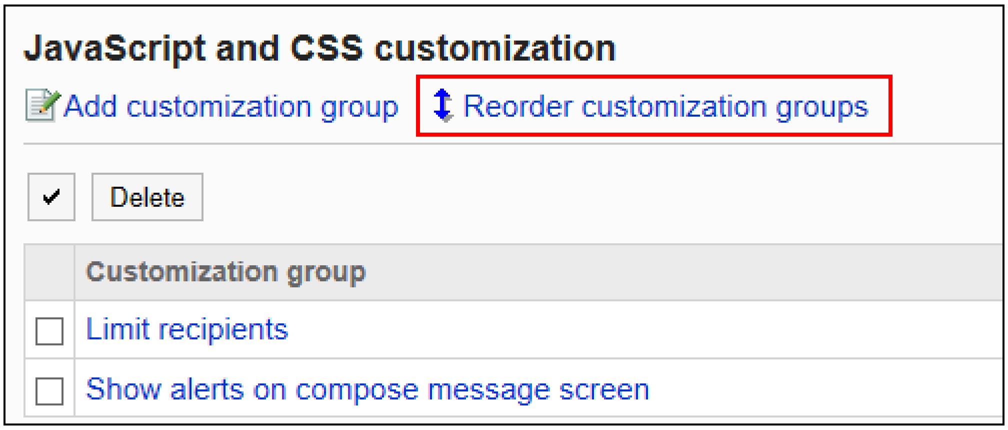
2. Click "System settings".

3. Select "Application settings" tab.

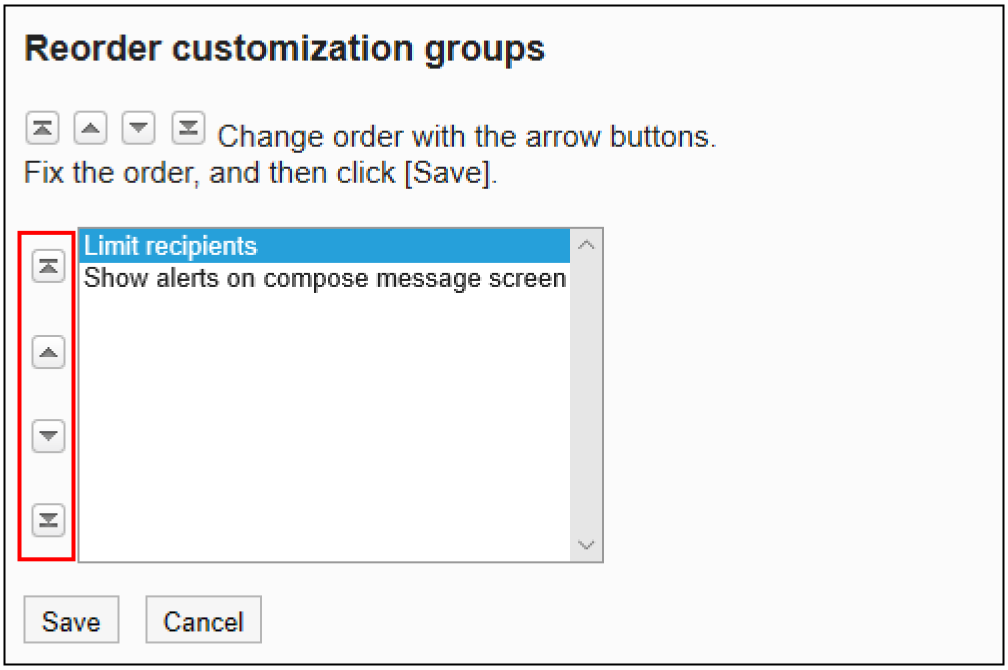
4. Click "Messages".

5. Click "JavaScript and CSS customization".

6. On the "JavaScript and CSS customization" screen, click "Reorder Customization Groups".



7. On the "Reorder Customization Groups" screen, reorder the customization groups.



8. **Confirm your settings and click "Save".**

9. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Deleting Customization Groups

Delete customization groups.

If you delete a customization group, its settings are disabled.

Caution

- After deleting customization groups, they cannot be restored.

Deleting Customization Groups One by One

Delete customization groups one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

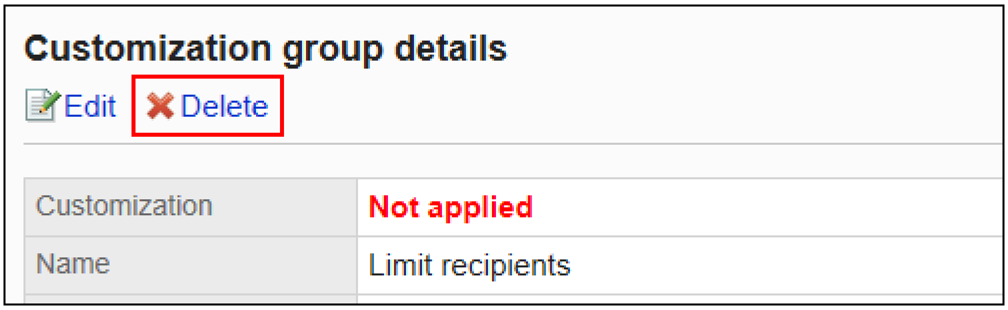
3. **Select "Application settings" tab.**

4. **Click "Messages".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to delete.**

7. **On the "Customization group details" screen, click "Delete".**



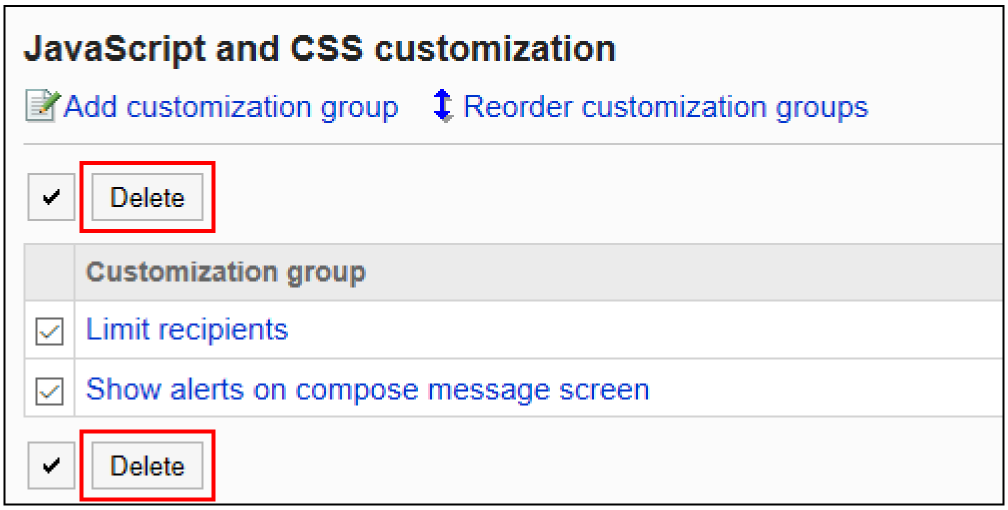
8. **Click "Yes" on the "Delete customization group" screen.**

Deleting Multiple Customization Groups in Bulk

Delete multiple customization groups by selecting them at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Messages".**
5. **Click "JavaScript and CSS customization".**
6. **On the "JavaScript and CSS customization" screen, select the checkbox of the customization group to delete, then click "Delete".**



7. Click "Yes" on the "Delete customization groups" screen.

1.15.6. E-mail Customization

This section describes how to customize e-mails using JavaScript files and CSS files.
The E-mail Customization function is available in Garoon version 5.5.0 or later.

Caution

- It is recommended that you specify the references to JavaScript files and CSS files in URL.
  If you specify them in file format, the data containing the file are also accessed when the Garoon data is accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Adding Customization Group

Add a customization group for each target or purpose of the customization.
Set the following information to customization groups:

- Users, organizations, or roles for which you want to apply customizations
- JavaScript files required for customization
- CSS files required for customization

Steps:

1. You can prepare JavaScript files and CSS files yourself.

2. Click the administration menu icon (gear icon) in the header.

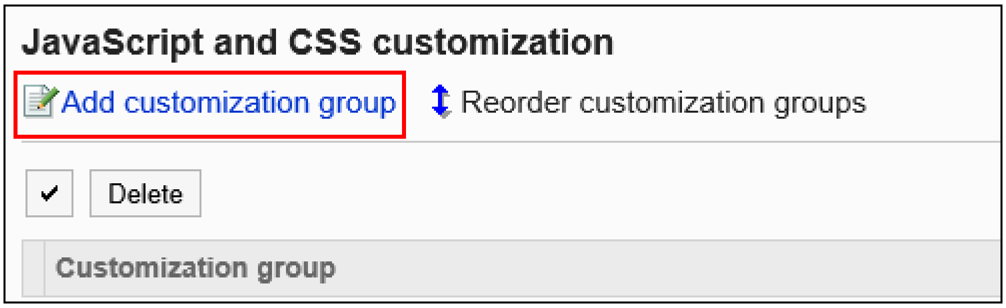
3. Click "System settings".

4. Select "Application settings" tab.

5. **Click "E-mail".**

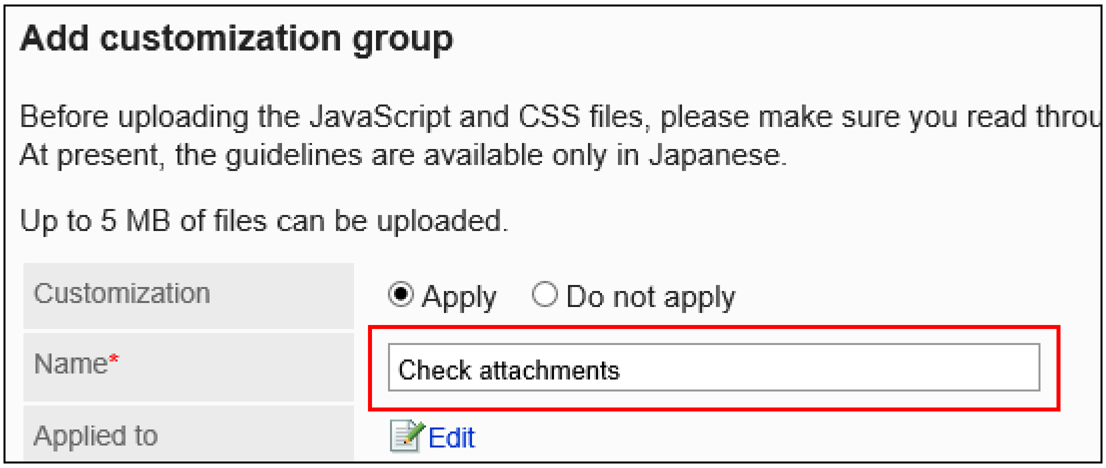
6. **Click "JavaScript and CSS customization".**

7. **On the "JavaScript and CSS customization" screen, click "Add customization group".**



8. **On the "Add Customization Group" screen, enter the "Customization Group name" field.**

You should set the name of the customization group.

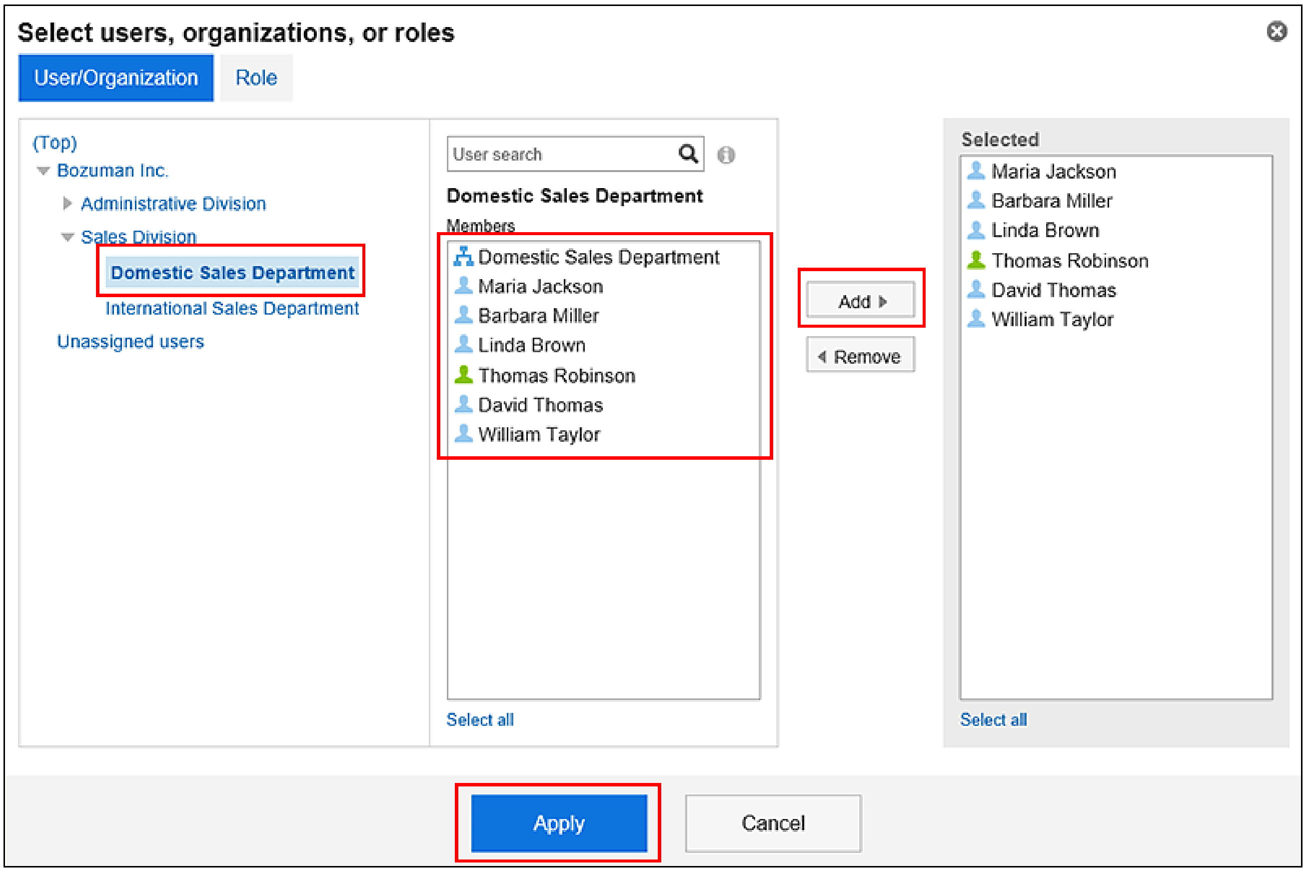


9. **In the "Applied to" field, click "Edit" and select the target for which you want to apply the customization.**

Select the target from the user, organization, or role. By default, the logged-in user has been set for the target.

You also can select users who are not allowed to use E-mail. Selecting such users does not cause an error. However, customizations are not applied to users who are not allowed to use E-mail.

The targets display in the order set automatically. Cannot change.



10. **In the "JavaScript customization" field, set the JavaScript file you want to apply.**

You can add up to 30 files or links.

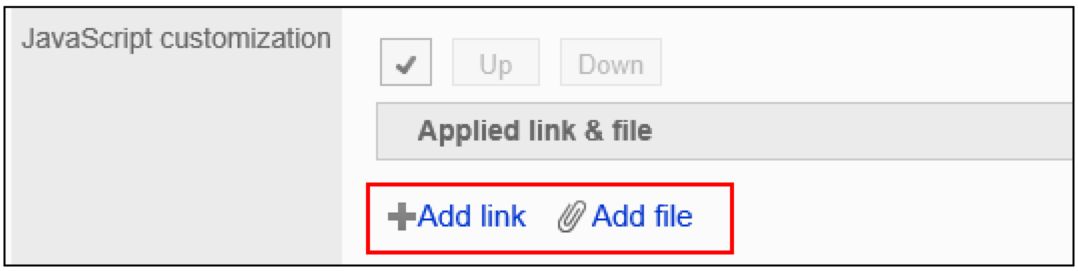
- File:

  Only files with a file extension of ".js" can be added.

  Up to 5 MB of files can be uploaded.

- Link:

  Specify a URL starting with "https://" in up to 512 characters.



11. **In the "CSS customization" field, set the CSS file you want to apply.**

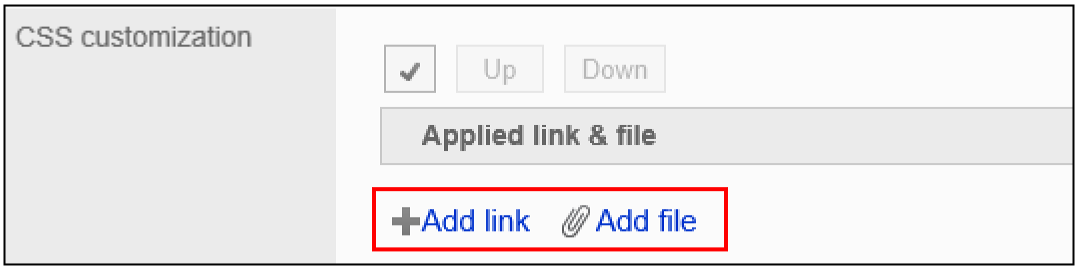
You can add up to 30 files or links.

- File:

  Only files with a file extension of ".css" can be added.

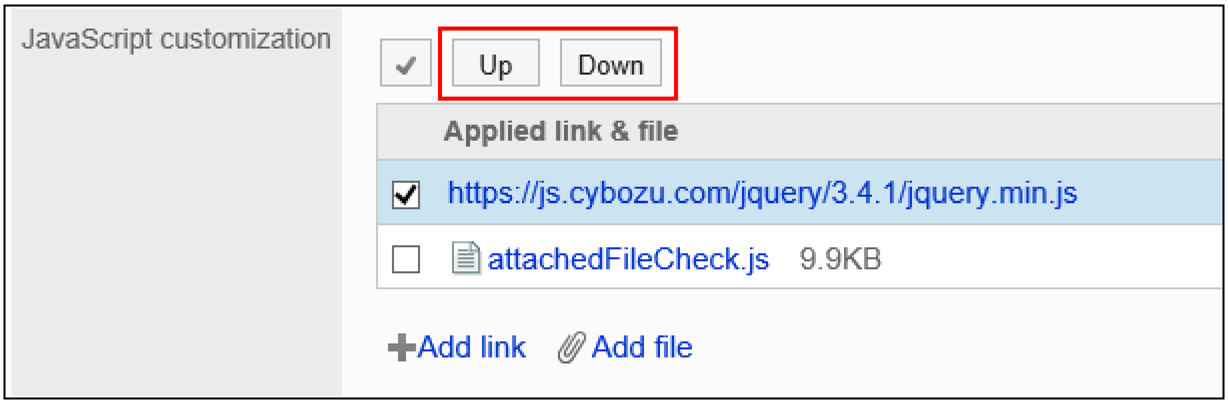
  Up to 5 MB of files can be uploaded.

- Link:
  Specify a URL starting with "https://" in up to 512 characters.

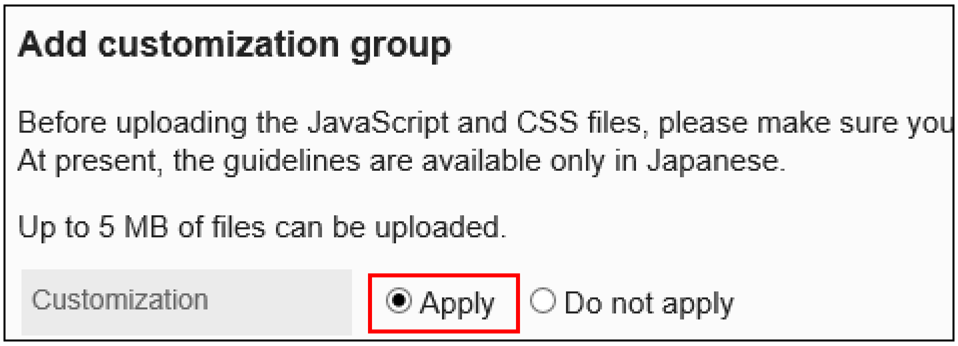


12. You can change the order of the files and links as needed.

JavaScript files run from top to bottom.
Select the check boxes for the files and links you want to reorder, and then click "Move Up" or "Move Down".



13. In the "Customization" field, select "Apply".



14. Confirm your settings and click "Add".

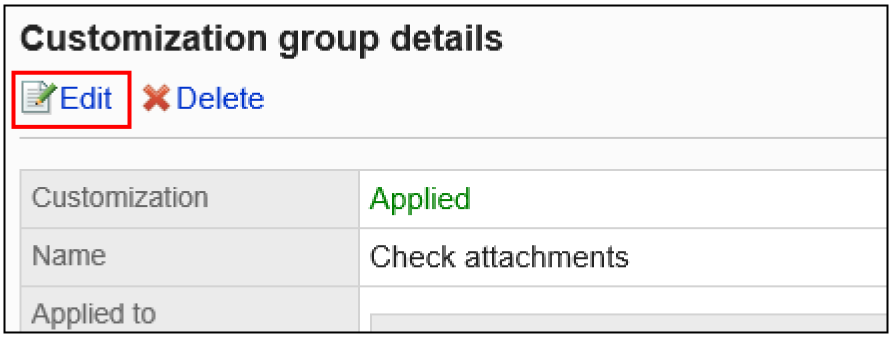
15. On the screen where the customizations are applied, confirm that the design and item functions are fine.

Changing Customization Groups

Change the settings in the customization group.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Messages".**
5. **Click "JavaScript and CSS customization".**
6. **On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to change.**
7. **On the "Customization group details" screen, click "Edit".**



8. **On the "Edit customization group" screen, set the required items.**
9. **Confirm your settings and click "Save".**
10. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

Reordering Customization Groups

Reorder the customization groups.
The JavaScript file and the CSS file are imported from top to bottom in the order appearing in "JavaScript and CSS customization" screen.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

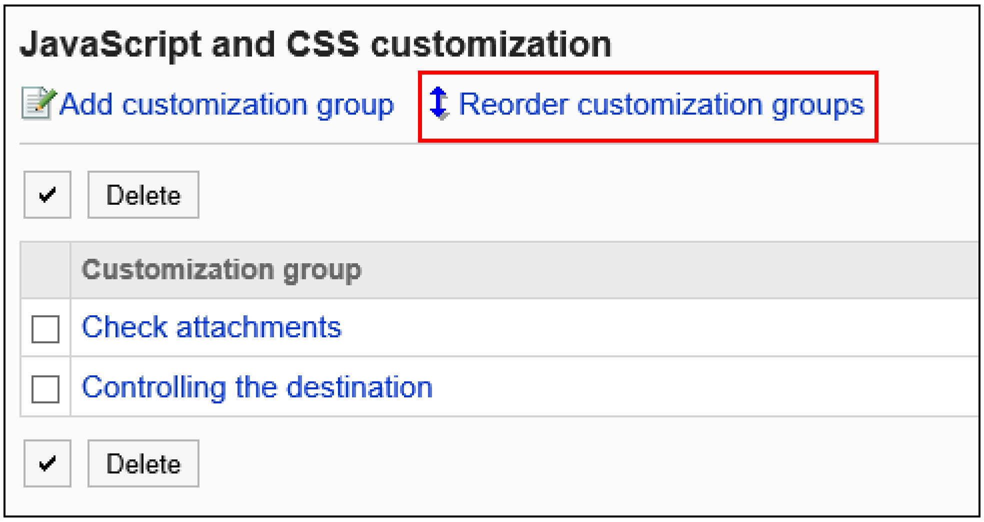
2. **Click "System settings".**

3. **Select "Application settings" tab.**

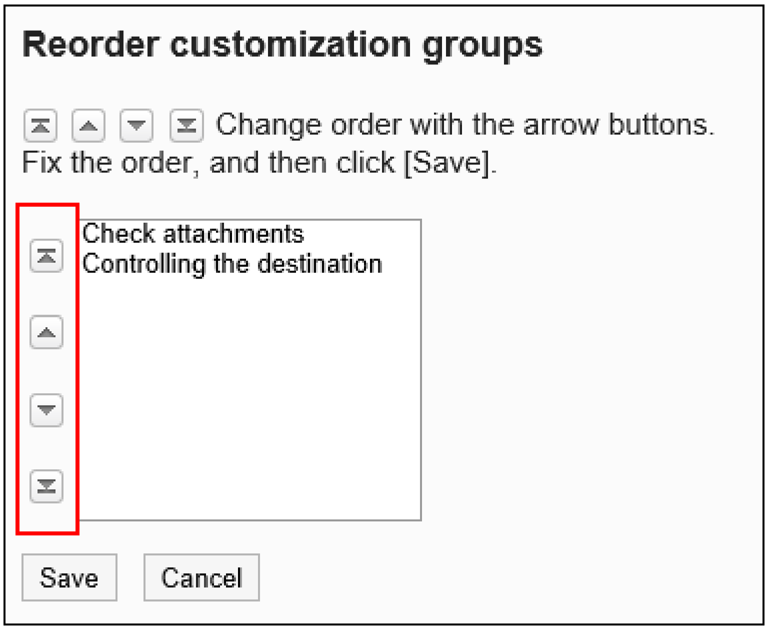
4. **Click "E-mail".**

5. **Click "JavaScript and CSS customization".**

6. **On the "JavaScript and CSS customization" screen, click "Reorder Customization Groups".**



7. **On the "Reorder Customization Groups" screen, reorder the customization groups.**



8. **Confirm your settings and click "Save".**

9. On the screen where the customizations are applied, confirm that the design and item functions are fine.

Deleting Customization Groups

Delete customization groups.

If you delete a customization group, its settings are disabled.

Caution

- After deleting customization groups, they cannot be restored.

Deleting Customization Groups One by One

Delete customization groups one by one.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

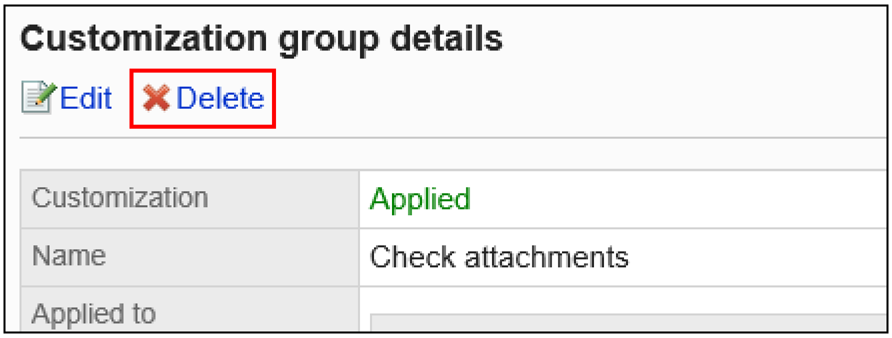
3. Select "Application settings" tab.

4. Click "E-mail".

5. Click "JavaScript and CSS customization".

6. On the "JavaScript and CSS customization" screen, click the customization group name of the customization group to delete.

7. On the "Customization group details" screen, click "Delete".



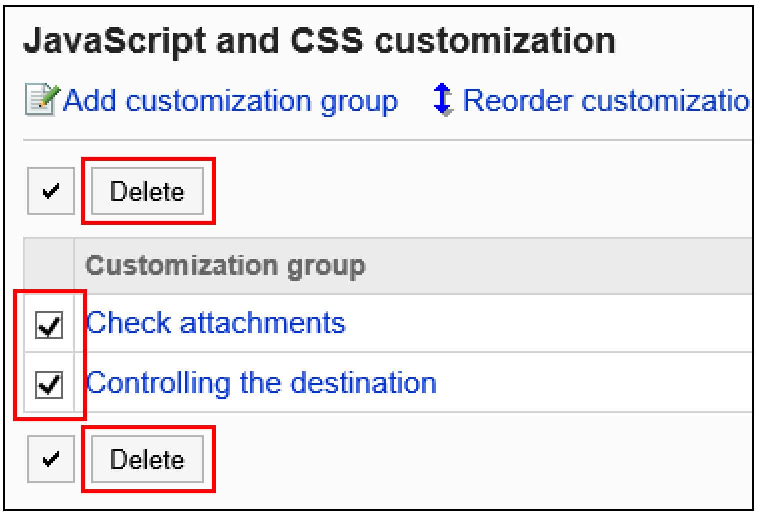
8. **Click "Yes" on the "Delete customization group" screen.**

Deleting Multiple Customization Groups in Bulk

Delete multiple customization groups by selecting them at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "JavaScript and CSS customization".**
6. **On the "JavaScript and CSS customization" screen, select the checkbox of the customization group to delete, then click "Delete".**



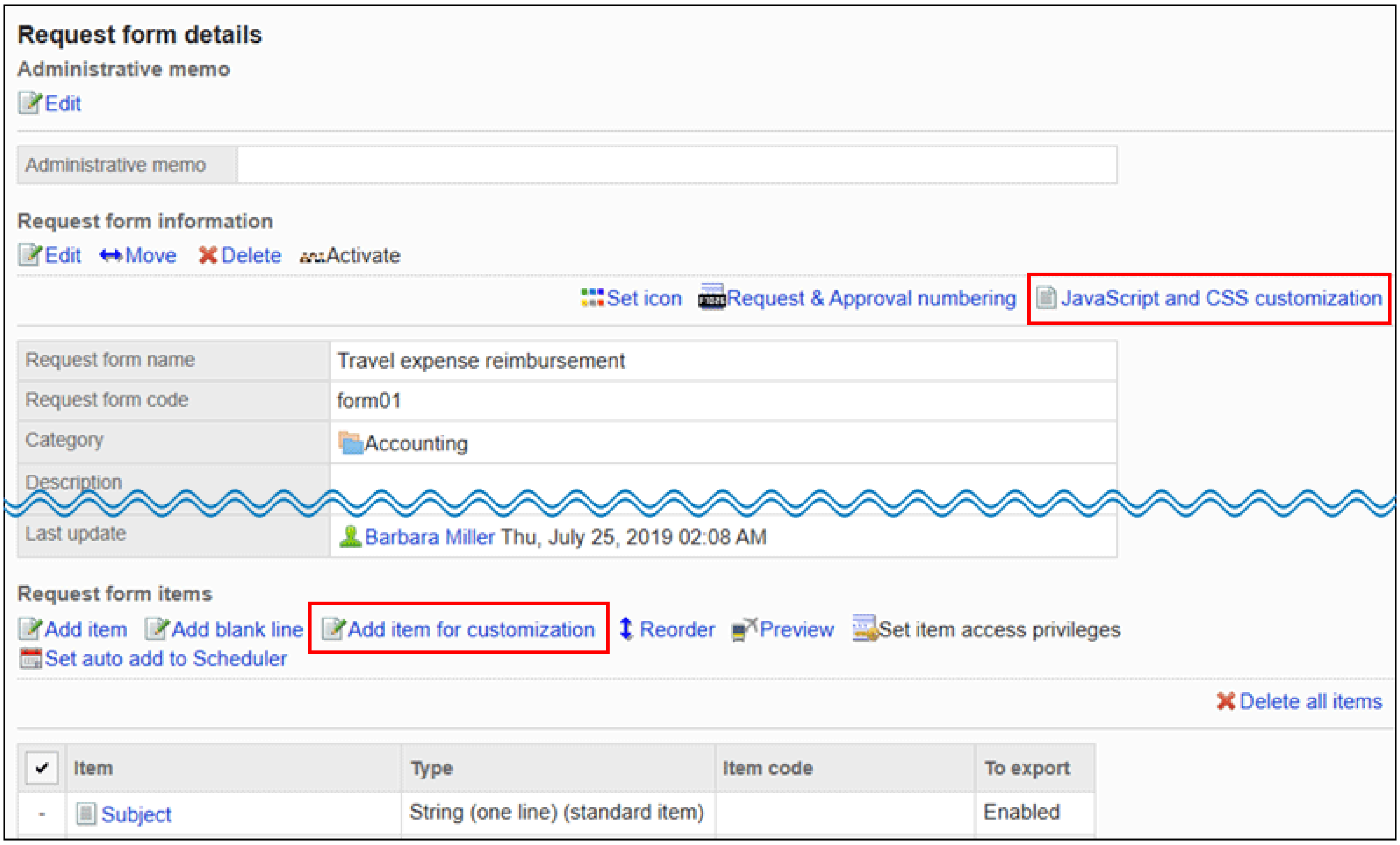
7. Click "Yes" on the "Delete customization groups" screen.

1.15.7. Workflow Customization

This section describes how to customize workflows using JavaScript files and CSS files.
The customization is applied to request data created after you apply the customization.
Request data created prior to applying the customization will not be applied.

Allowing Workflow Customization

You can set whether to allow customizations using JavaScript files and CSS files.
If you allow customization, the "Request form details" page appears with action links to apply JavaScript files or CSS files and an action link to add items for JavaScript customization.



Steps:

1. Click the administration menu icon (gear icon) in the header.

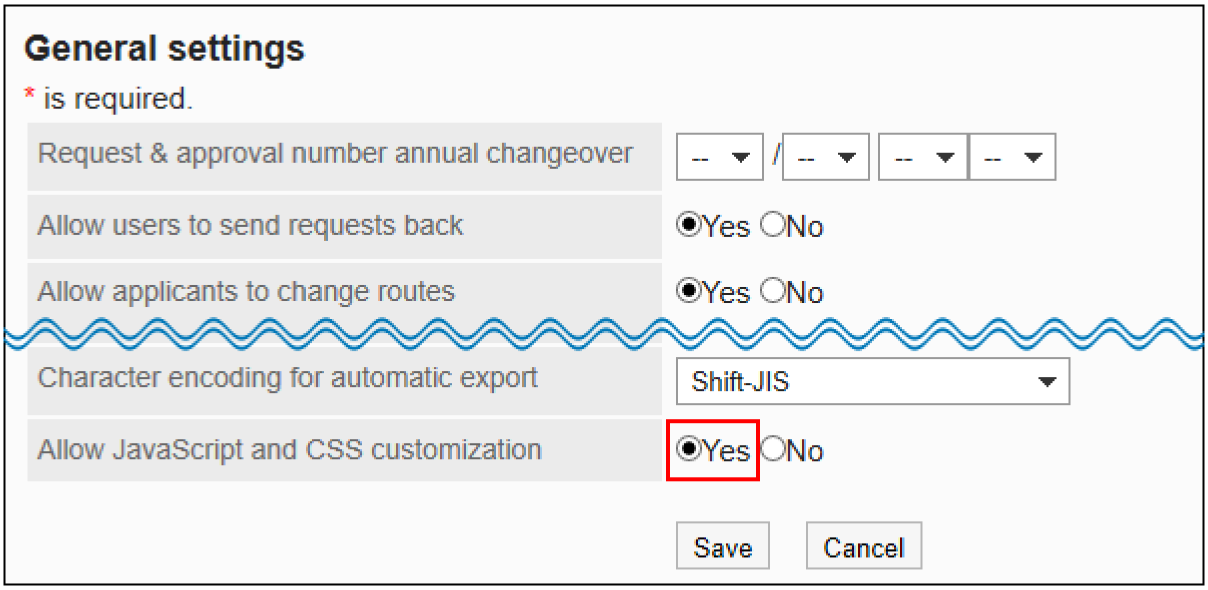
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "General Settings".**

6. **On the "General Settings" screen, in "Allow JavaScript and CSS customization" field, select "Allow".**



7. **Confirm your settings and click "Apply".**

Note

- If you change the settings from allowing to not allowing customizations, the JavaScript files and CSS files applied are disabled.
  However, the items for JavaScript customization that you have set for the request form remains intact.

Setting Items for JavaScript Customization

This section describes how to add, change, and delete items for JavaScript customization.
Use the items for JavaScript customization if you want use spaces for the purpose of changing the design in a request form in workflow customizations. The items defined in JavaScript and CSS are placed where the items for customization are placed.

The items for JavaScript customization is used for JavaScript customizations. You don't need to use them if you don't customize the request form.
For details on customization, refer to the page in cybozu developer network.

Caution

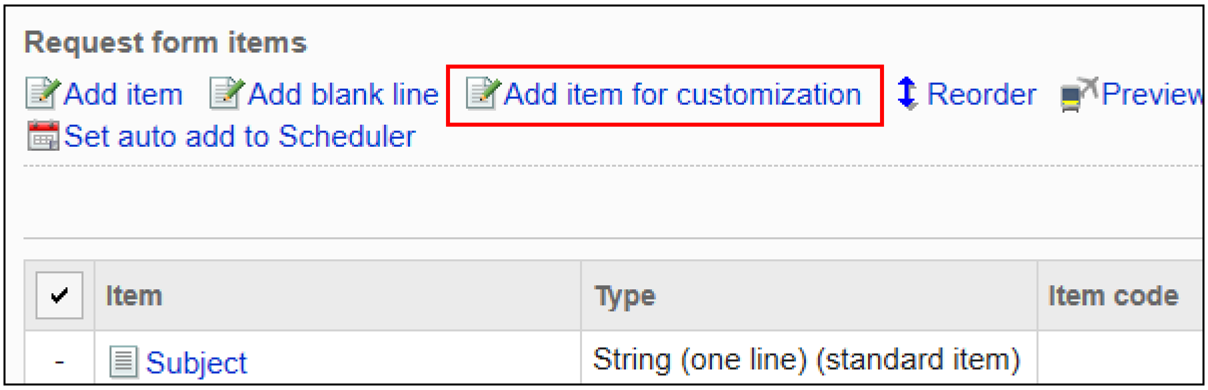
- We recommend that you disable the request form to prevent users from using them while working with the items for JavaScript customization.
  For details, refer to Disabling Request Forms(1356Page).
- Access permissions cannot be set for items for JavaScript customization.
- The items for JavaScript customization is not available for route branching.

Adding Items for JavaScript Customization

Add items for JavaScript customization to request forms.
To add an item for JavaScript customization, you must be allowed to customize the workflow.

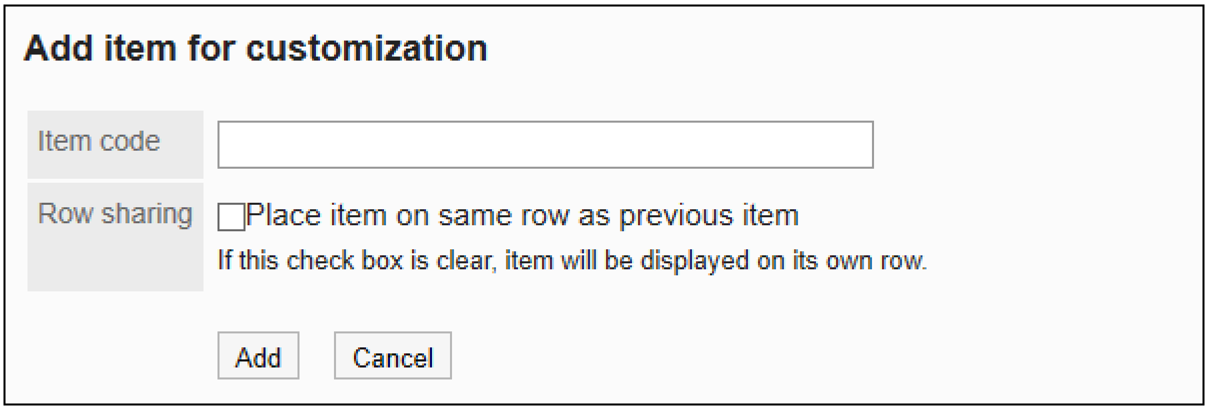
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, then click the request form name of the request form to which you add items for JavaScript customization.**
7. **On "Request form details" screen, click "Add item for customization" in the items list of the Request Form.**



8. On the "Add item for customization" screen, set the required items.

- Item Code:
  An item code is a unique code to identify items for JavaScript customization. You can enter codes in up to 100 characters.
  You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
  If an item code is duplicated in one request form, an error occurs.
- Place the item on the right:
  If you select "Place item on same row as previous item" check box, the item is placed next to the previous item.



9. Confirm your settings and click "Add".

Added items are displayed at the bottom of the items list of the Request Form.

Changing Items for JavaScript Customization

Change the settings for the items for JavaScript customization.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. **Click "System settings".**

3. **Select "Application settings" tab.**

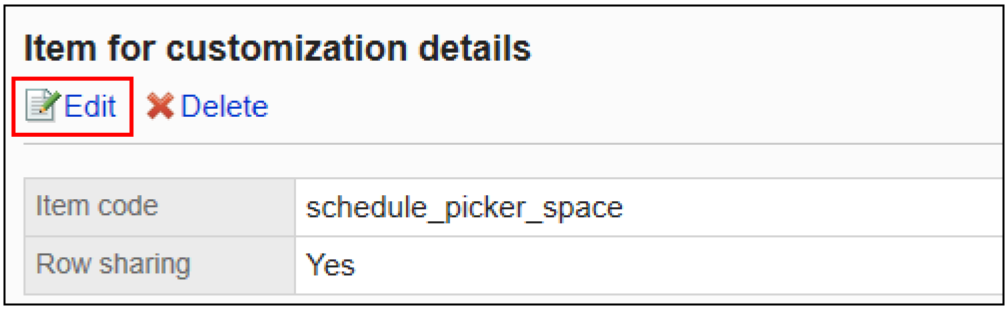
4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category, then click the request form name of the request form in which you modify items for JavaScript customization.**

7. **On the items list of the Request Form in the "Request form details" screen, click the item name of the items for JavaScript customization to change.**

8. **On the "Item for customization details" screen, click "Edit".**



9. **On the "Edit item for customization" screen, set the required items.**

10. **Confirm your settings and click "Save".**

11. **If you have changed the placement, check the request form on the preview screen.**

For details, refer to Previewing Request Forms(1395Page).

Reordering Items for JavaScript Customization

Reorder the items for JavaScript customization.

The steps to reorder are the same as changing the order of items and empty lines.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

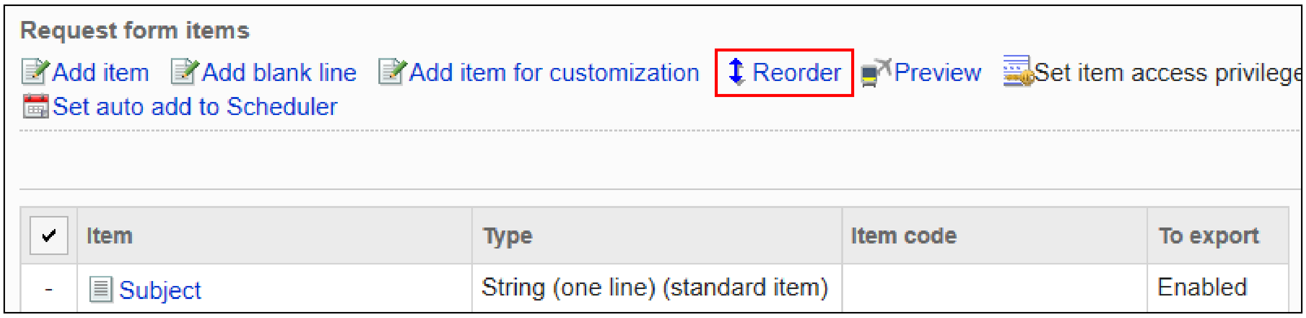
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

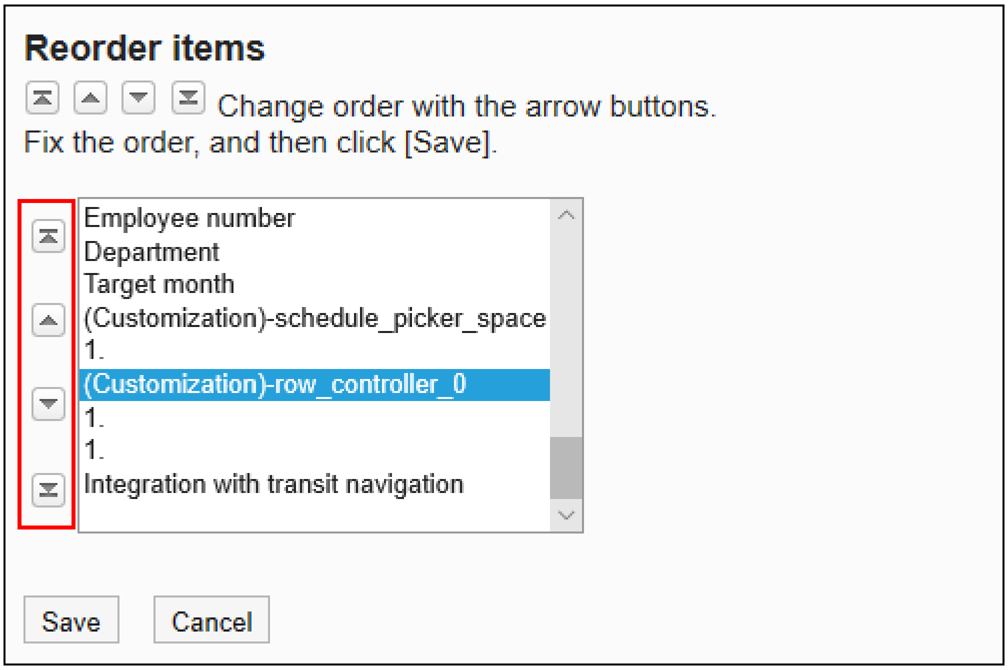
5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category, then click the request form name of the request form in which you reorder items for JavaScript customization.**

7. **On the items list of the Request Form in "Request form Details" screen, click "Reorder".**



8. **On the "Reorder" items screen, reorder the items for JavaScript customization.**



9. **Confirm your settings and click "Save".**

10. **On the preview screen, check the request form.**

For details, refer to Previewing Request Forms(1395Page).

Deleting Items for JavaScript Customization

Delete the item for JavaScript customization.

The customization is applied to request data created after you apply the customization.

For this reason, if you delete the item for JavaScript customization, it is not applied to the request data that you created before the customization.

Caution

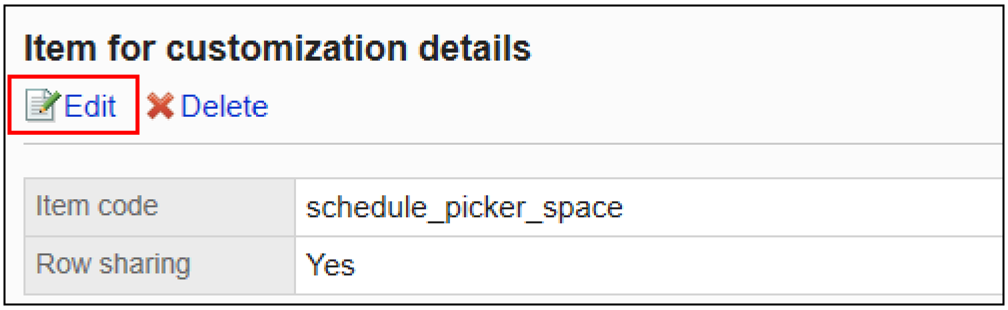
- After deleting item for JavaScript customization, they cannot be restored.

Deleting Items for JavaScript Customization One by One

Delete the item for JavaScript customization one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, then click the request form name of the request form in which you delete items for JavaScript customization.**
7. **On the items list of the Request Form in the "Request form details" screen, click the item name of the item for JavaScript customization to delete.**
8. **On the "Item for customization details" screen, click "Delete".**



9. **Click "Yes" on "Delete item for customization" screen.**

10. **On the preview screen, check the request form.**

    For details, refer to Previewing Request Forms(1395Page).

Deleting Multiple Items for JavaScript Customization in Bulk

Select the items for JavaScript customization to delete, then delete them in bulk.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

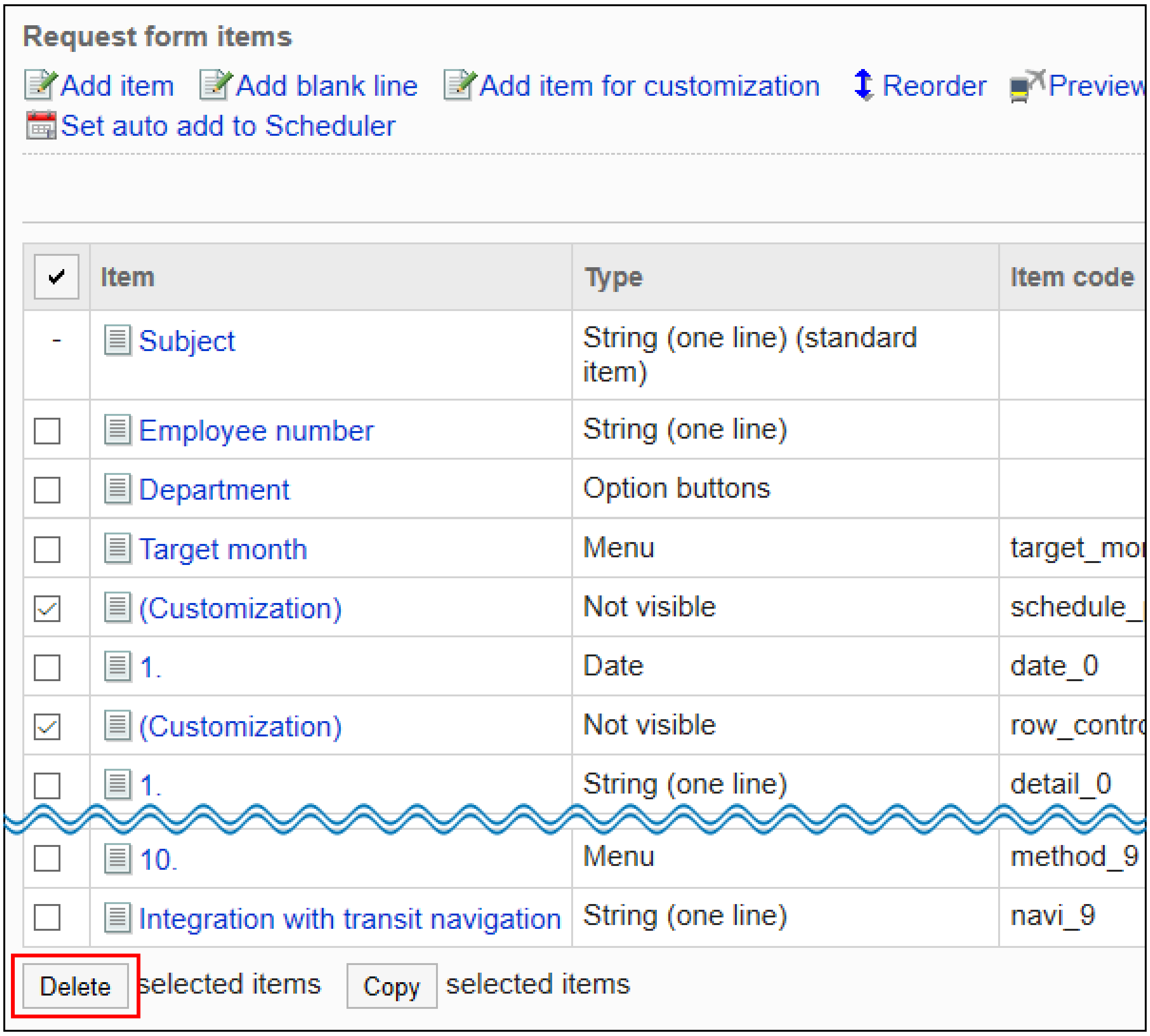
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category, then click the request form name of the request form in which you delete items for JavaScript customization.**

7. **On the items list of the Request Form in the "Request form details" screen, click the items for JavaScript customization to delete, then click "Delete".**



8. **Click "Yes" on the Delete all items screen.**

9. **On the preview screen, check the request form.**

For details, refer to Previewing Request Forms(1395Page).

Applying JavaScript/CSS Files

Apply JavaScript files or CSS files to request forms.

Caution

- We recommend that you disable the request form so that users cannot use it until the customization is completed.
  For details, refer to Disabling Request Forms(1356Page).

- It is recommended that you specify the references to JavaScript files and CSS files in URL.
  If you specify them in file format, the data containing the file are also accessed when the Garoon data is accessed. It may increase the number of concurrent accesses to the server so the performance of the server may degrades.

Steps:

1. You can prepare JavaScript files and CSS files yourself.

2. Click the administration menu icon (gear icon) in the header.

3. Click "System settings".

4. Select "Application settings" tab.

5. Click "Workflow".

6. Click "Request Form" list.

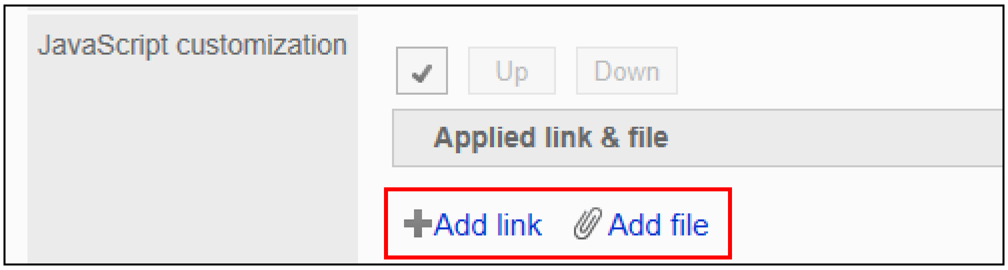
7. On the "Request Form" list screen, select a category, then click the request form name of the request form to which you apply the JavaScript files or CSS files.

8. On the "Request form details" screen, click "JavaScript and CSS customization" in request form information.

9. In the "JavaScript customization" field on the "JavaScript and CSS customization" screen, set the JavaScript file to apply.

You can add up to 30 files or links.

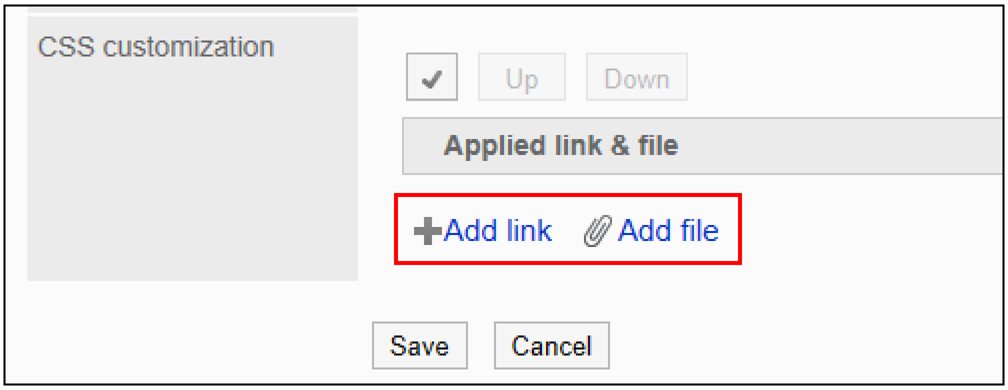
- File:
  Only files with an extension of ".js" can be added.
  Up to 5 MB of files can be uploaded.
- Link:
  Specify a URL starting with "https://" in up to 512 characters.



10. **In the "CSS customization" field, set the CSS file you want to apply.**

You can add up to 30 files or links.

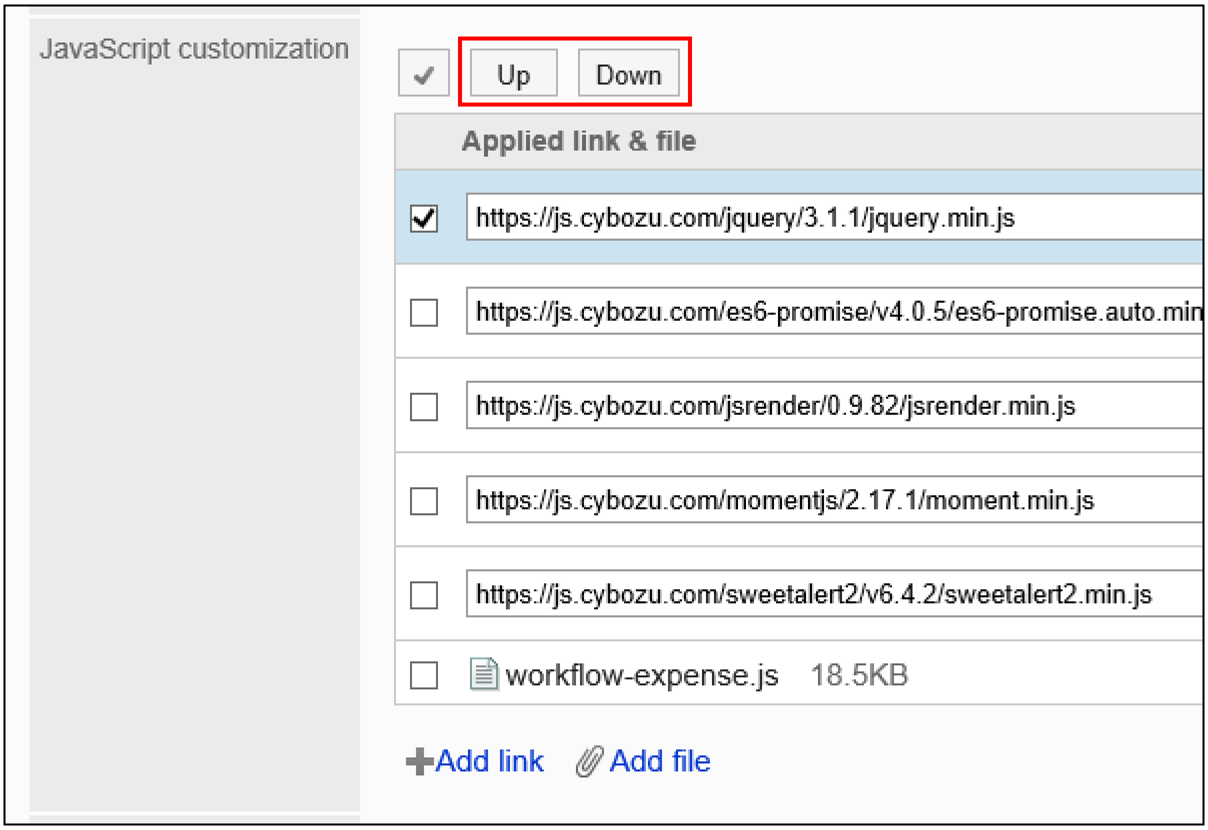
- File:
  Only files with an extension of ".css" can be added.
  Up to 5 MB of files can be uploaded.
- Link:
  Specify a URL starting with "https://" in up to 512 characters.



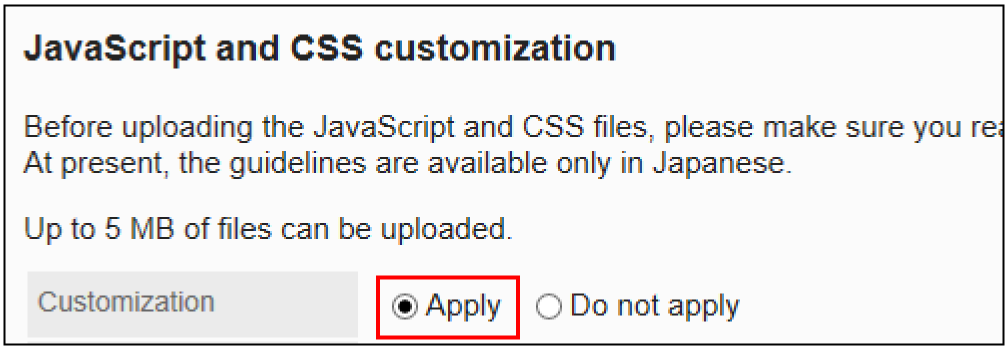
11. **You can change the order of the files and links as needed.**

JavaScript files run from top to bottom.

Select the check boxes for the files and links you want to reorder, and then click "Move Up" or "Move Down".



12. **In the "Customization" field, select "Apply".**



13. **Confirm your settings and click "Save".**

14. **On the screen where the customizations are applied, confirm that the design and item functions are fine.**

15. **Enable the request form.**

For details, refer to Enabling Request Forms(1355Page).

1.16. Monitoring Queues

On the Garoon System Administration screen, you can check and delete queues that exist in the queue table of the full text Search server.
This feature is available only when you are building a full Text Search Server version 2.0 or later.
For details on the full text search server, refer to the Full Text Search Server Guide.

References

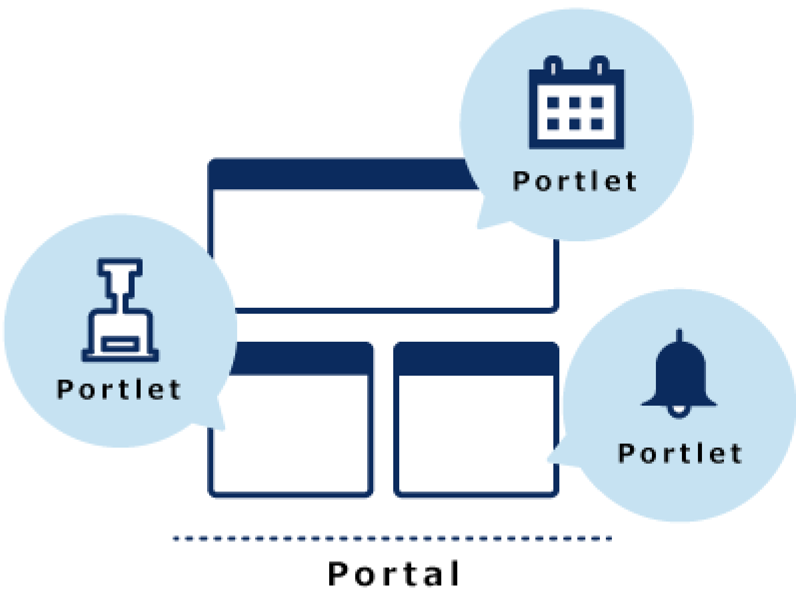
- Full Text Search Specifications(1772Page)
- Working with Full Text Search

2 chapter Application

This section describes the administrative settings required to use Garoon applications.
For details on editing application names and permission to use applications, refer to Application(205Page) in the basic system.

2.1. Portal

Portal is an application that works as a gateway to Garoon having Garoon functionalities called Portlets on it to make them easy to use.



Portals consist of the following types:

- System setting portals:
  Portal that is set and managed by system administrators or application administrators. You can create portals for each department.
  You can set permissions for portals, and portlets placed in portals. Setting permissions allows you to control departments and users to access the portals and portlets.
  Users cannot change or hide the system setting portals.
- My Portal:
  This portal is set by users.
  Users can place portlets they need and the frequently used portlets in their My Portal. My Portal is accessible only for the user who created it.

You can easily create your own My Portal using My Portal template. Only system administrators and portal application administrators can create a My Portal template.

References

- Flow for Creating Portals(634Page)
- Managing HTML and PHP Portlets(691Page)
- Portlet Types and Settings(722Page)
- How to View the Screen

2.1.1. Portal Settings

This section describes portal settings.
Before you start preparing to create portals, it makes easier to do so knowing the flow to create portals(634Page).

References

- Adding Portals(637Page)
- Setting Access Permissions for Portal(639Page)
- Deploying Portlets(646Page)
- Setting Access Permissions for Portlets(651Page)
- Setting up Operational Administrative Privileges for Portals(678Page)

2.1.1.1. Flow for Creating Portals

Create portals following to the flow shown below:

Steps:

Step 1 **Add portals to the list of portals.**

For details, refer to Adding Portals(637Page).

Step 2 **Specify users who can use the portal.**

For details, refer to Setting Access Permissions for Portal(639Page).

Step 3 **Place portlets in the portal.**

For details, refer to Deploying Portlets(646Page).

Step 4 **Specify users who can use the portlet.**

For details, refer to Setting Access Permissions for Portlets(651Page).

Step

5 **Set up the portlet.**

Optionally, you can change the display name or the settings of the portlet.

For details, refer to Configuring Portlets(659Page).

Step 6 **Make the portlet public.**

When you are done configuring the portlet, make the portlet public.

For details, refer to Making Portlets Public(663Page).

Step 7 **Check the appearance of the portal.**

For details, refer to Previewing Portals(664Page).

Step 8 **Make the portal public.**

For details, refer to Making Portals Public(677Page).

Step 9 **Set up operational administrators for the portal.**

Set up operational administrators who are responsible to maintain the portal.

For details, refer to Setting up Operational Administrative Privileges for Portals(678Page).

Note

- Permissions can be granted for portal levels or portlet levels.

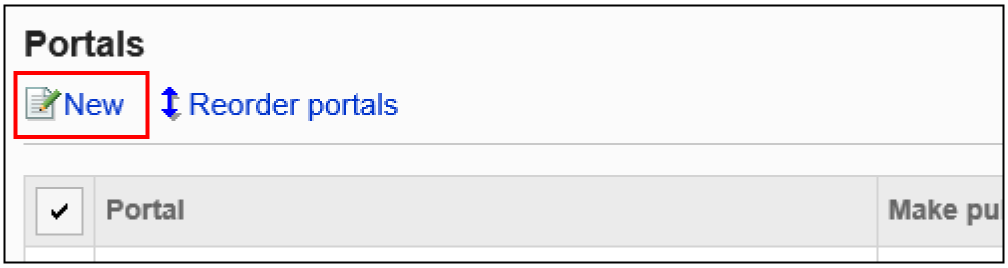
- You can change the contents for each portlet.

2.1.1.2. Adding Portals

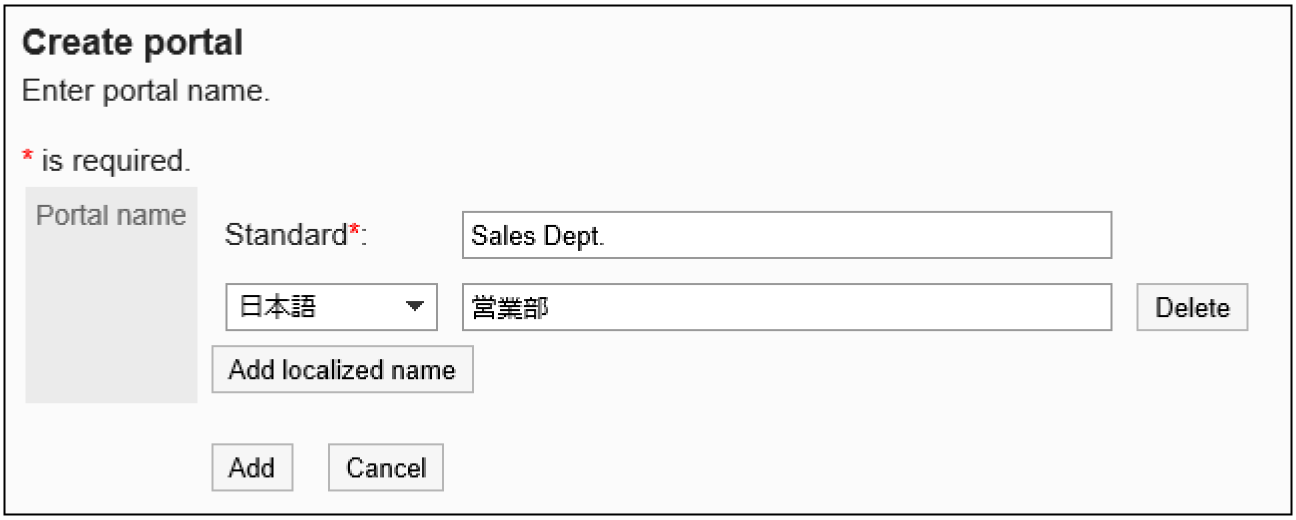
Add portals to the list of portals.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **On the screen for a portal list, click the item to add a portal.**



6. **On the screen to add portals, enter the portal name field.**



You should set the default portal name.

Clicking "Add localized name" allows you to set portal names in multiple languages.

If you do not set the portal name in the user preference language, the default portal name is displayed.

The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese

  Displayed in Traditional Chinese.

7. **Confirm your settings and click "Add".**

Changing Portal Names

Change portal names.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

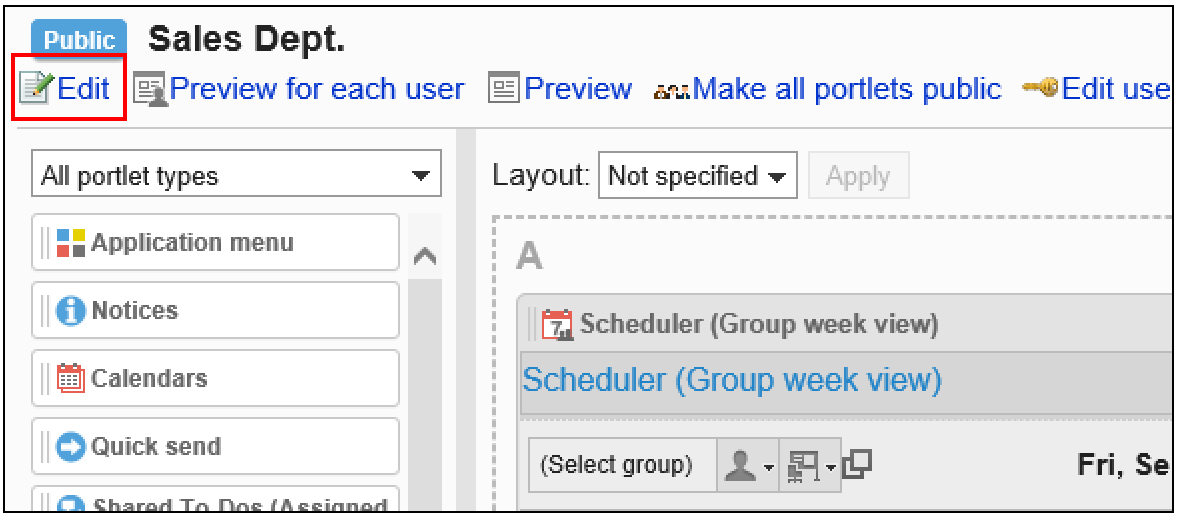
3. **Select "Application settings" tab.**

4. **Click Portal.**

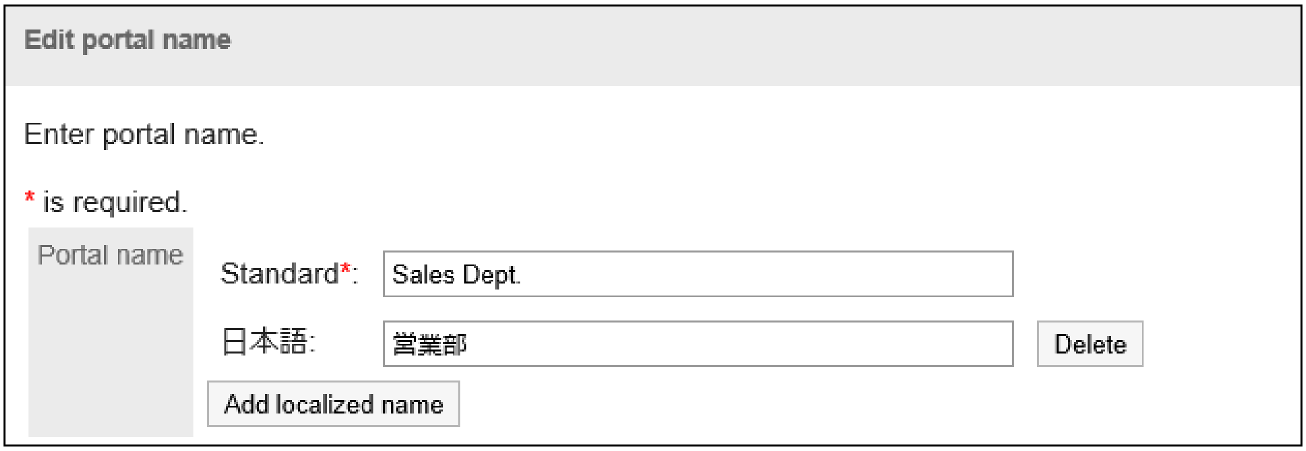
5. **Click the item to show a portal list.**

6. **On the screen for a portal list, select the portal name for the portal to change its name.**

7. **On the screen for portal details, click the item to change the portal name.**



8. **On the screen to change portal names, change the portal name.**



9. **Confirm your settings and click "Save".**

2.1.1.3. Setting Access Permissions for Portal

For portals, set the following permissions for departments, users, or roles:

- Access permissions

The permissions for portals vary by the security model applied to the portal.

The default setting is set to "REVOKE (All users have access except users on list)". Therefore, all users are allowed to view portals.

For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

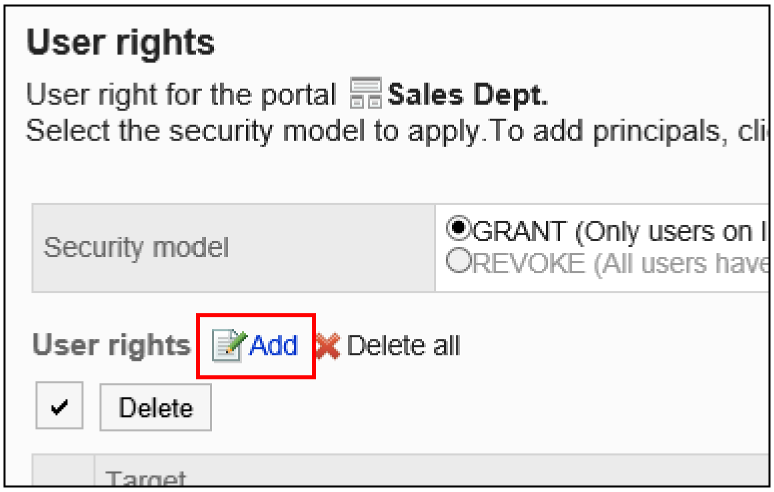
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, select a portal.**
7. **On the screen for portal details, click the item to set permissions.**

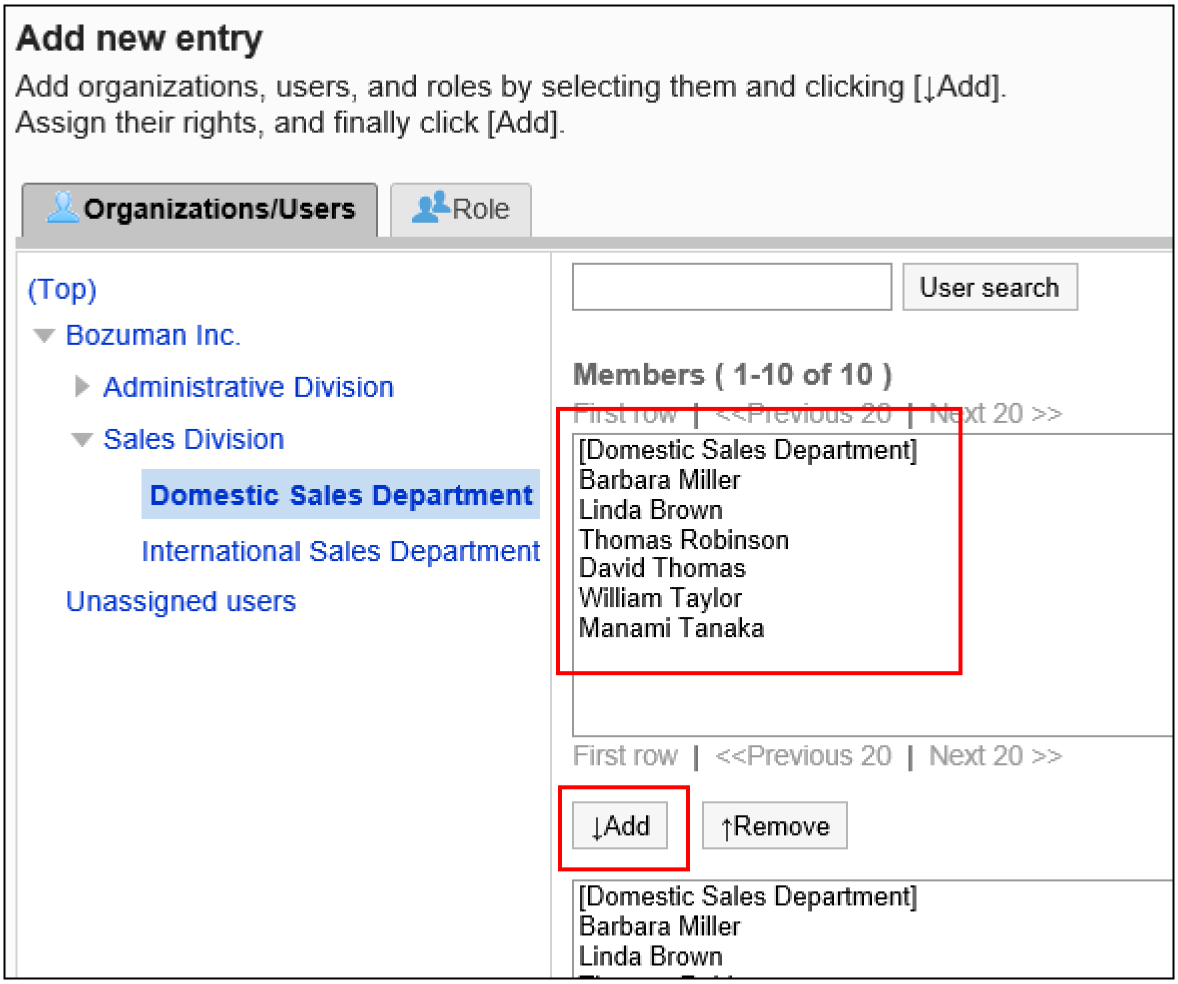
8. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).

9. On "User rights" screen, click "Add".



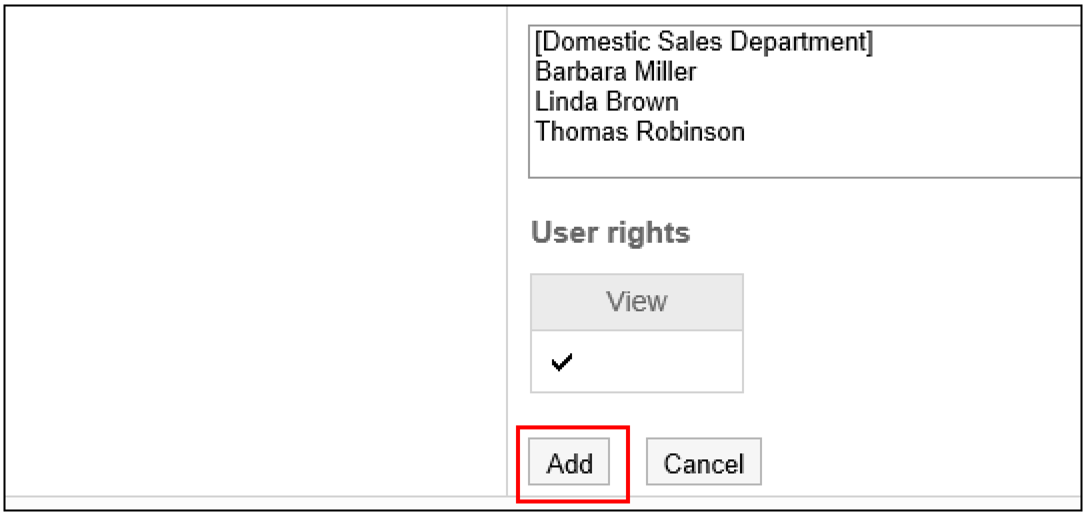
10. On "Add new entry" screen, select the department, user, or role to set permissions, and click "Add".



To select a role, switch the view to the Roles tab.

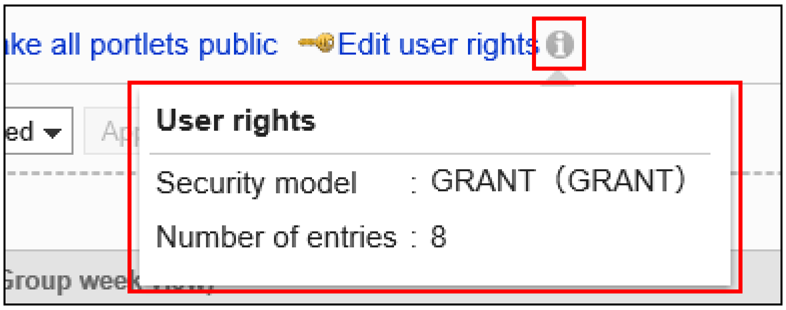
After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

11. Under "User rights", check the permissions to allow, and then click "Add".



Note

- On the screen for portal details, clicking the icon to the right of the setting permissions page let you check the security model and the total number of departments, users, and roles having permissions.



Deleting User Rights

Delete user rights granted to users or departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

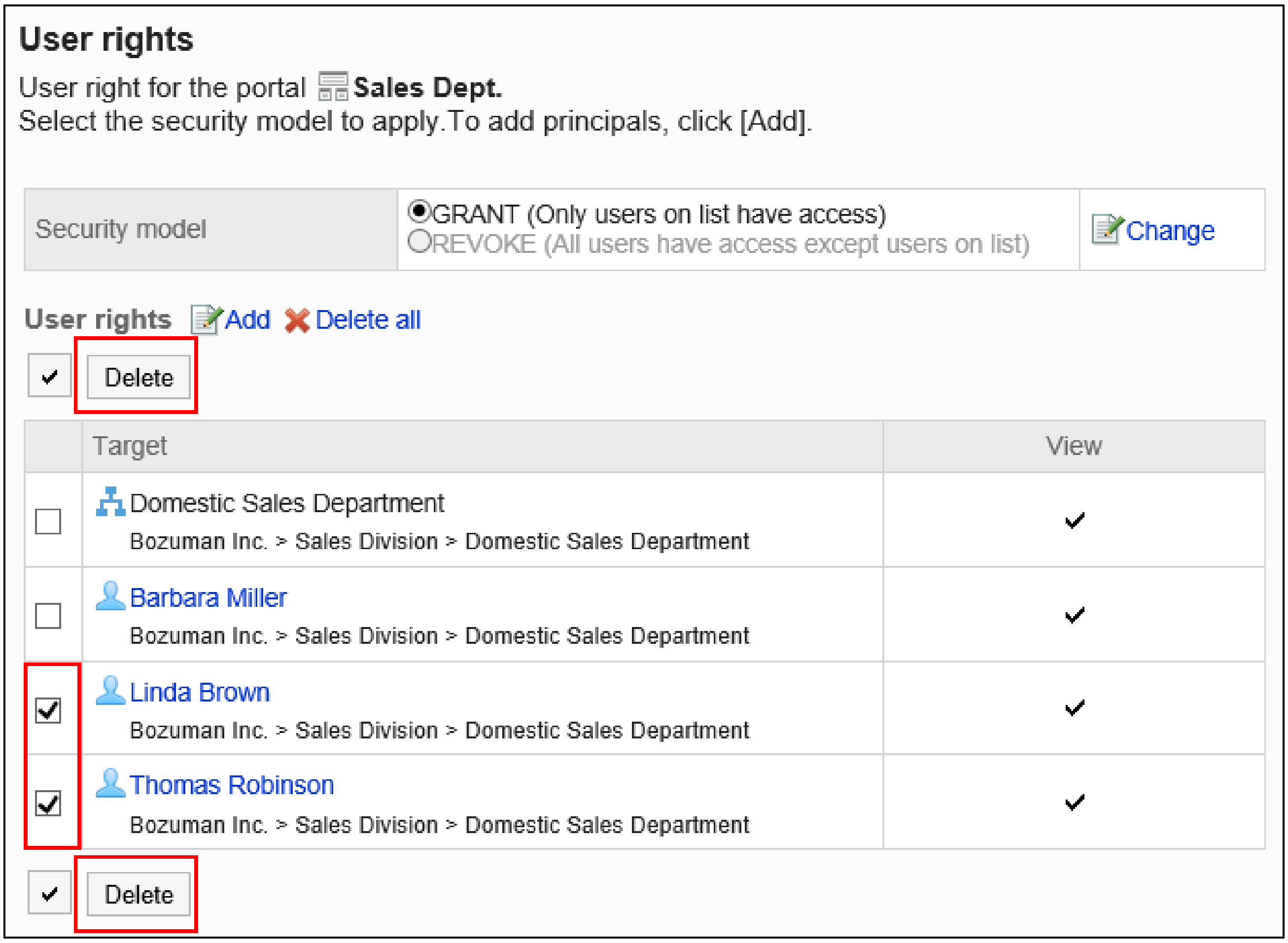
Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**

6. **On the screen for portal details, click the item to set permissions.**

7. **On "User rights" screen, select the check box to delete, and then click "Delete".**



8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

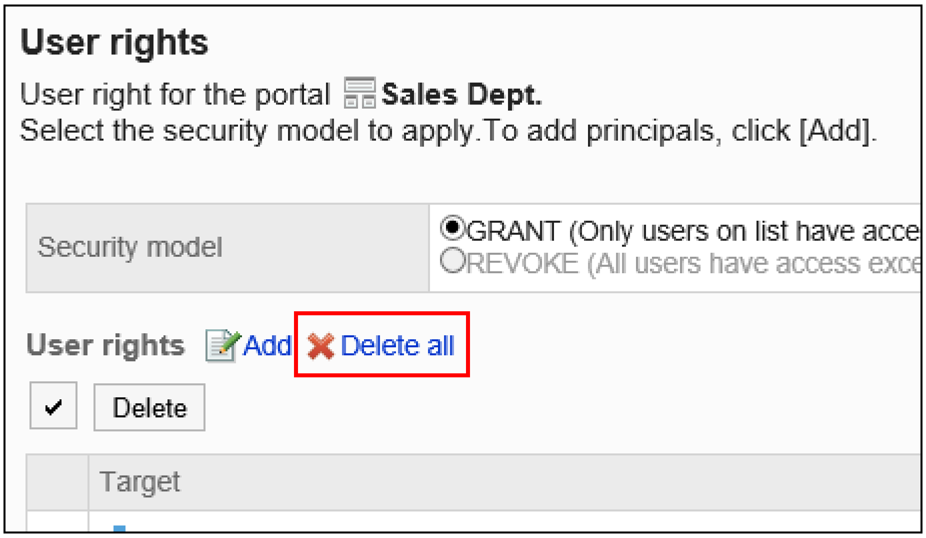
4. Click Portal.

5. Click the item to show a portal list.

6. On the screen for a portal list, select a portal.

7. On the screen for portal details, click the item to set permissions.

8. On "User rights" screen, click "Delete all".



9. Click "Yes" on "Delete all user rights" screen.

2.1.1.4. Deploying Portlets

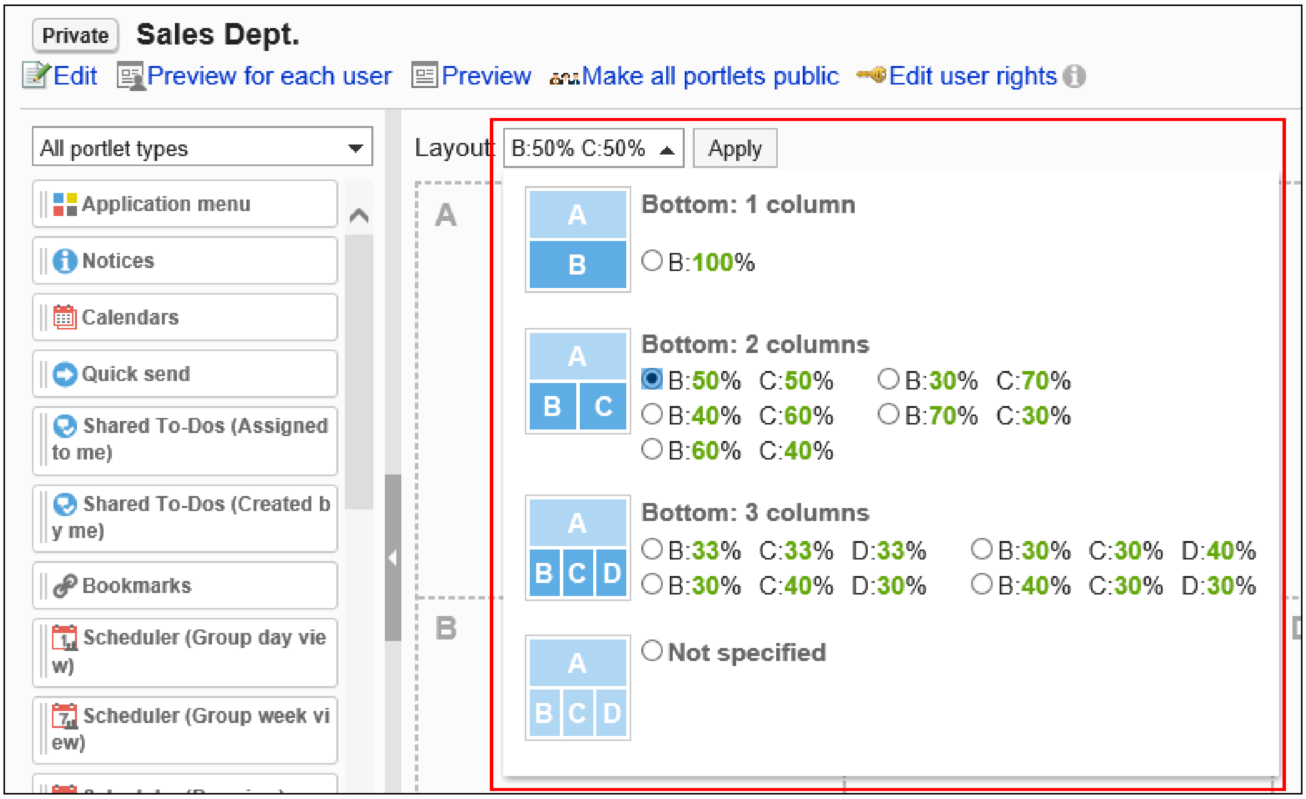
Place portlets in portals.

Changing Portal Layouts

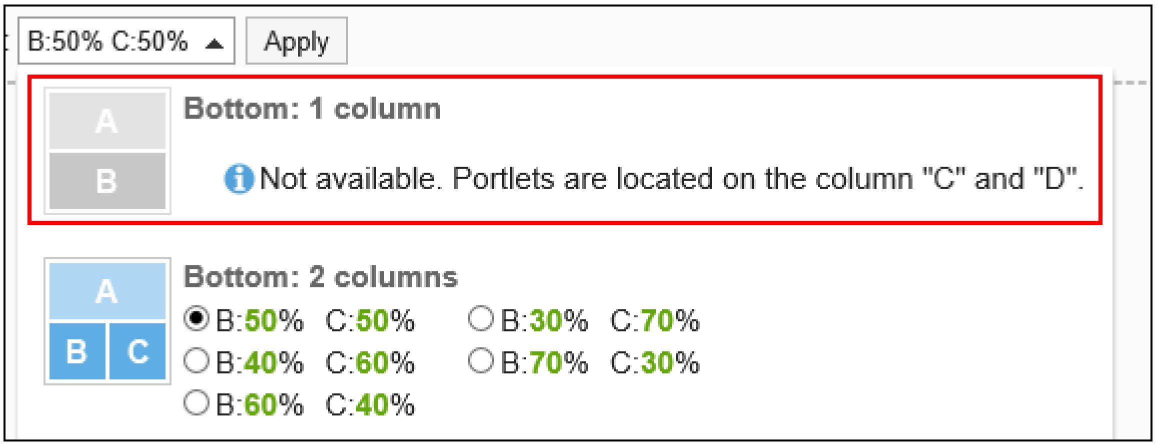
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, click the portal name for the portal to change its layout.**
7. **On the screen for portal details, select a layout from the "Layout" drop-down list, and click "Apply".**

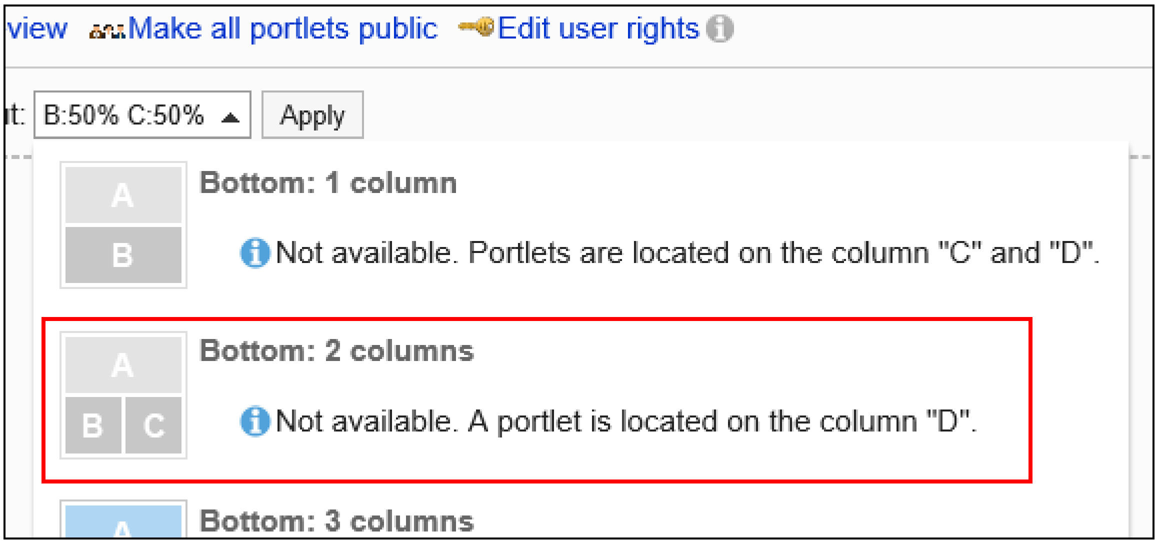
   Select the column numbers and the ratio of the widths to place in lower half.



If the lower "C" or "D" already has portlets, you cannot select the bottom: 1 column layout.

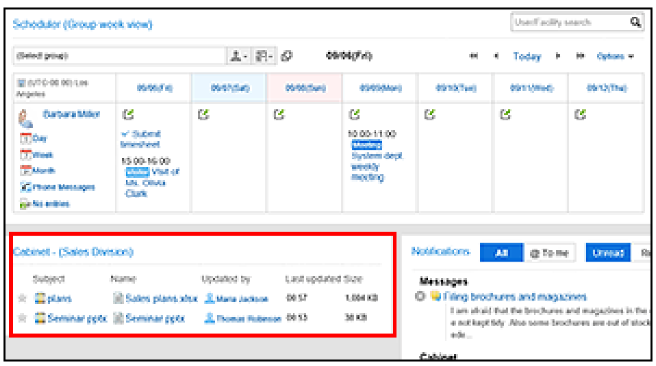


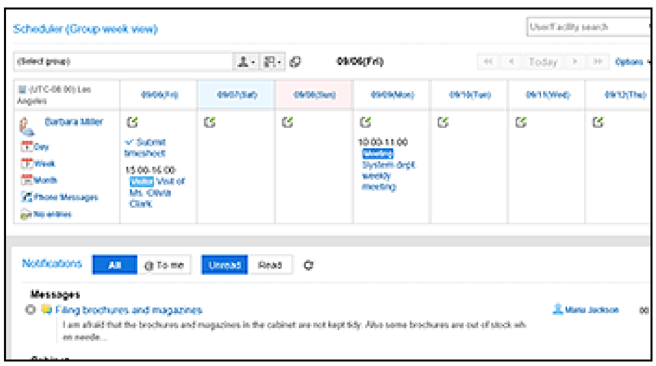
If you have a portlet placed in the lower half, you cannot select a layout with fewer columns than the number of columns that the portlet has.



Note

- If "None" is selected, the width of the portlet to which you don't have view permission is automatically adjusted.





Adding Portlets

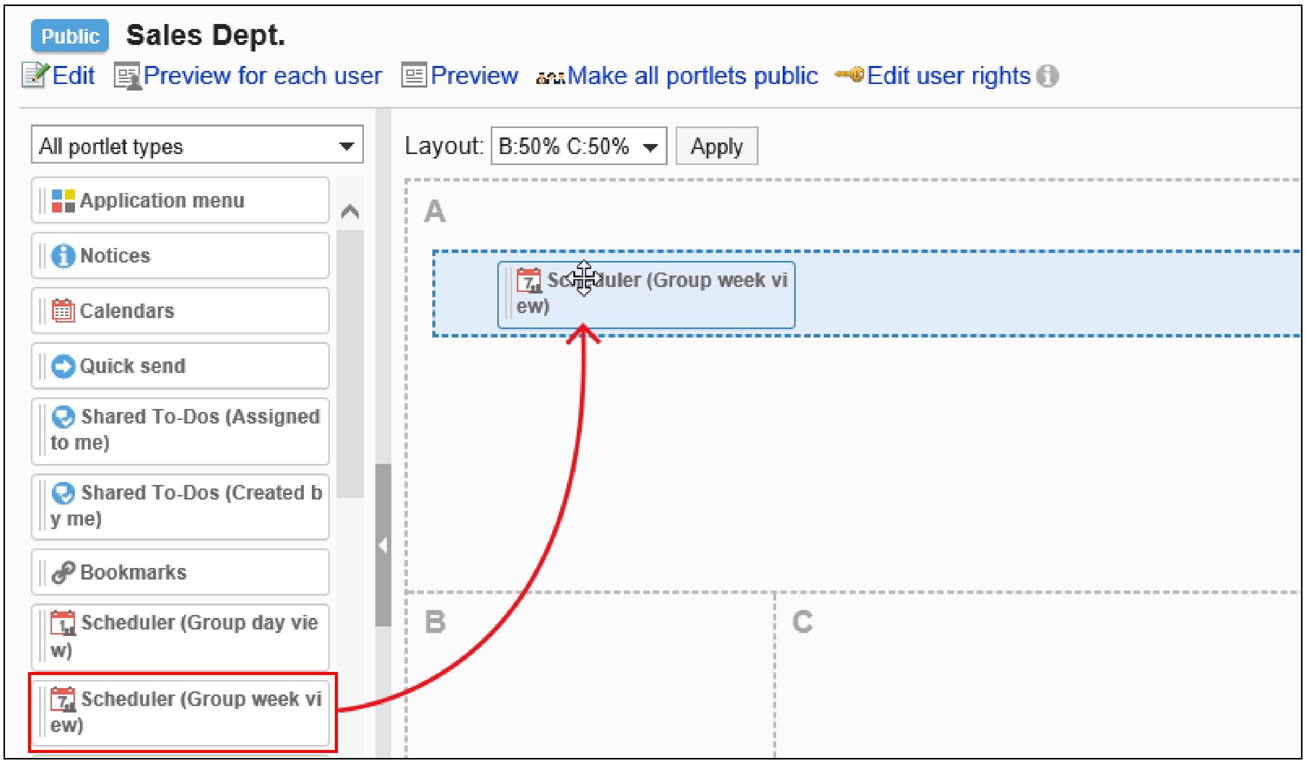
Add portlets to portals. You can do so by dragging and dropping portlets.
The guideline for the maximum number of portlets placed to one portal is 20. Placing portlets that put excessive loads on the server or a large number of portlets on portals may cause a heavy load on Garoon.

Note

- **If the Drag and Drop Function Is Disabled in Internet Explorer**
  If you deselect "Display intranet sites in Compatibility View" in the Compatibility View settings in Internet Explorer, you can use the drag and drop function.

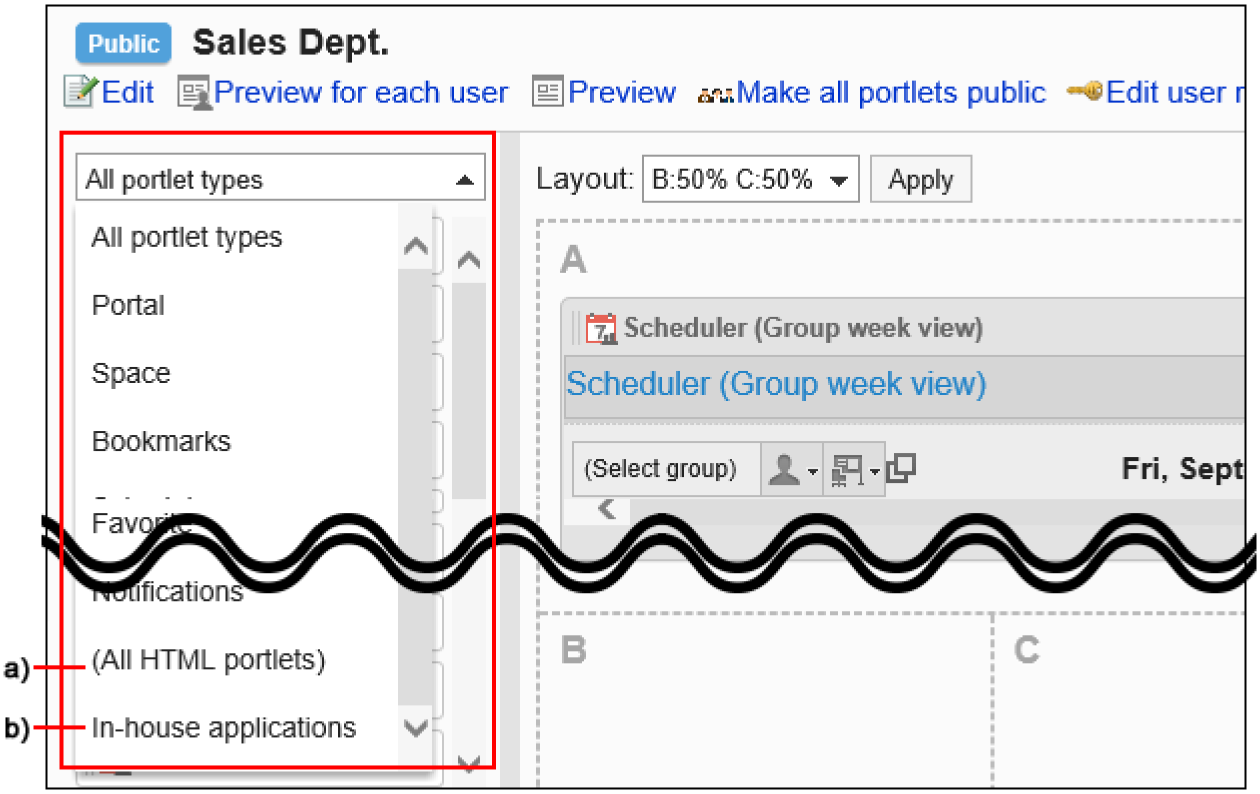
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, select a portal.**
7. **On the screen for portal details, select the portlet to add and drag it to the destination.**



You can filter the portlets to display on the list.

To filter portlets, click the filter name on the left and select the filter you want.



a): The filter appears when you have set HTML portlets(774Page) or PHP portlets(775Page).

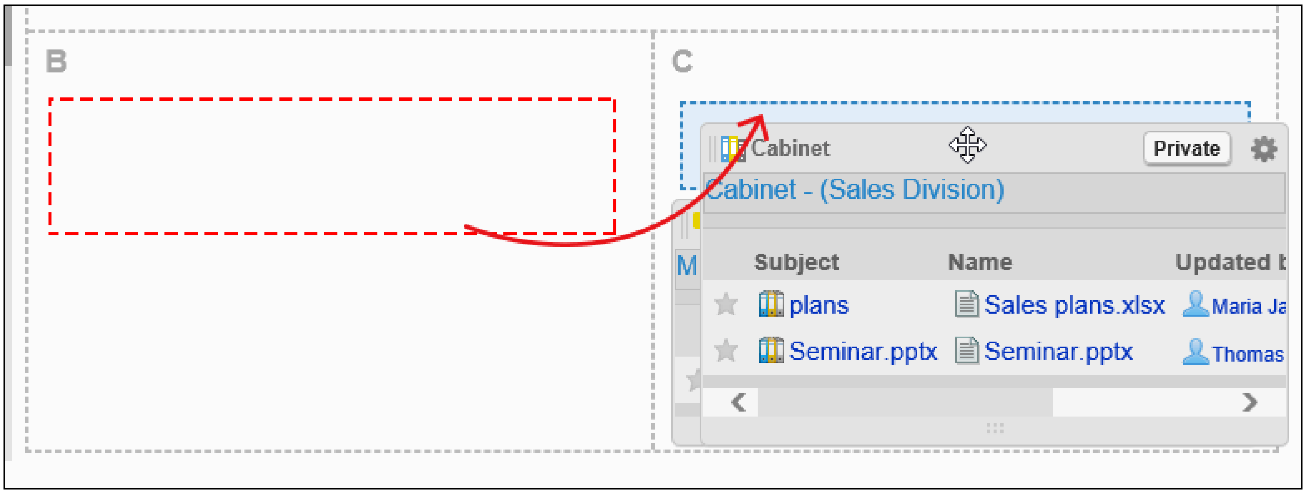
B): The Portlet group name is displayed when you are setting it.

Moving Portlets

Move portlets to another column.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, select a portal.**
7. **On the screen for portal details, select the portlet to move and drag it to the destination.**



Deleting Portlets Placed in Portals

Delete portlets that are placed.

Caution

- After deleting portals, they cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

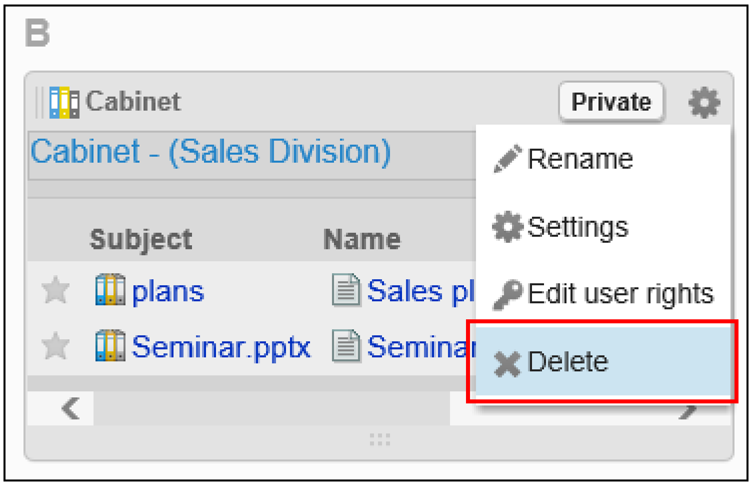
3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to show a portal list.**

6. **On the screen for a portal list, select a portal.**

7. **On the screen for portal details, click "Delete" on the gear icon for the portlet to delete.**



8. **Click "Yes" on "Delete" screen.**

2.1.1.5. Setting Access Permissions for Portlets

For portlets, set the following permissions for departments, users, or roles:

- Access permissions

The permissions for portlets vary by the security model applied to the portlet.

The default setting is set to "REVOKE (All users have access except users on list)". Therefore, all users are allowed to view portlets.

For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

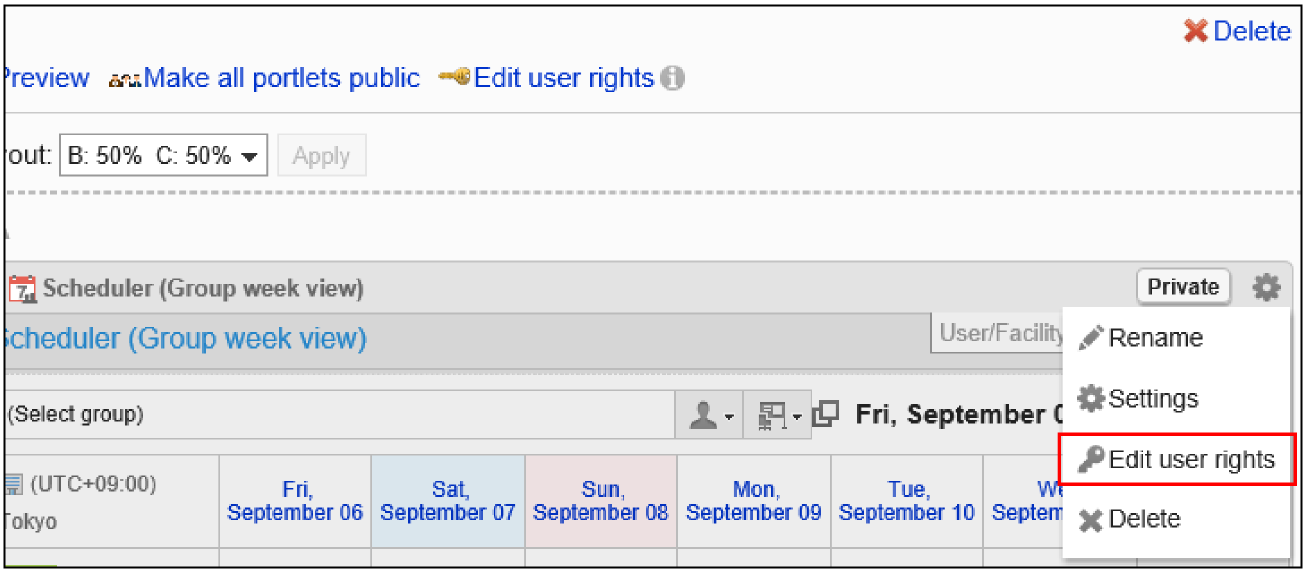
The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

Steps:

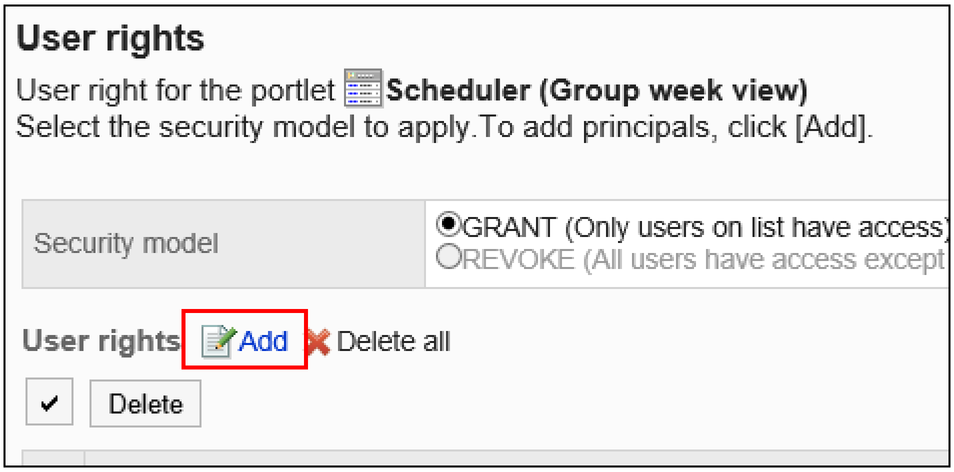
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, select a portal.**
7. **On the screen for portal details, click to change the permissions on the gear icon for the portlet to change its permission settings.**



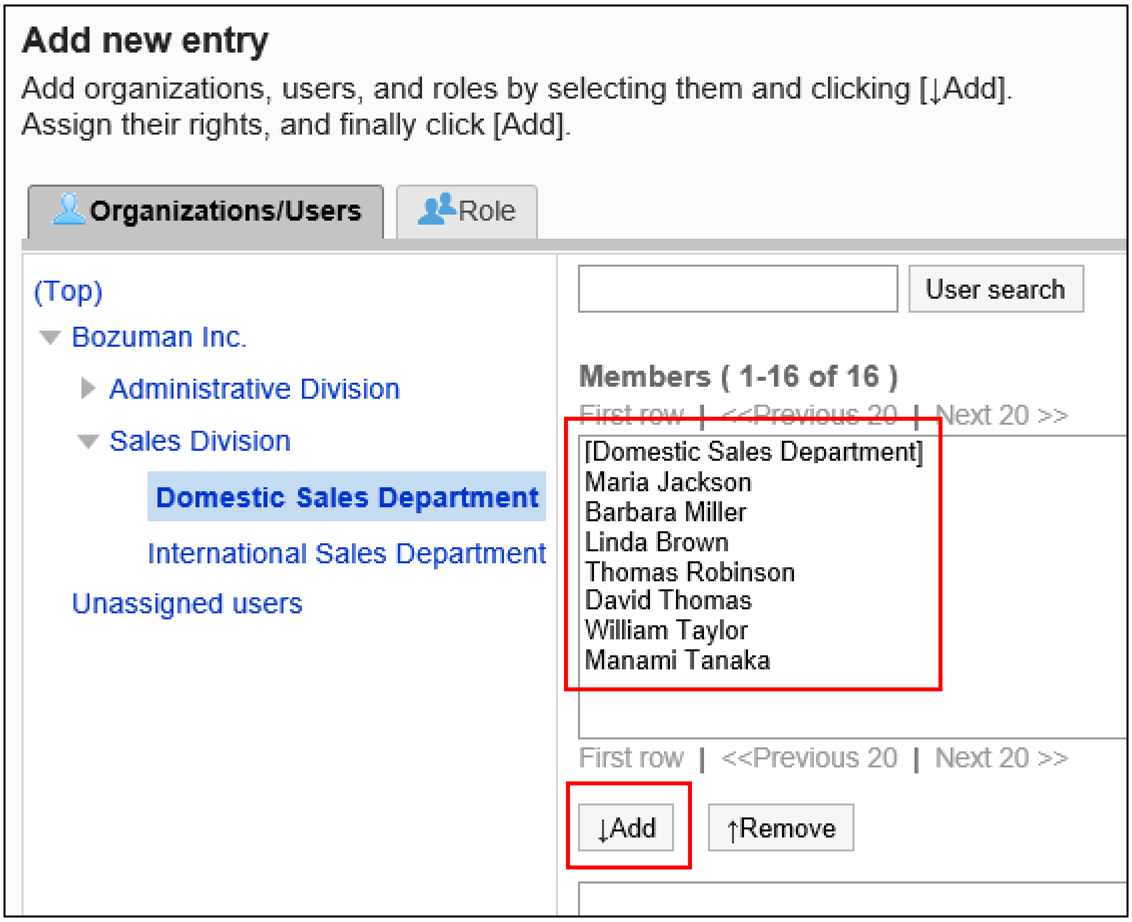
8. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).

9. **On "User rights" screen, click "Add".**



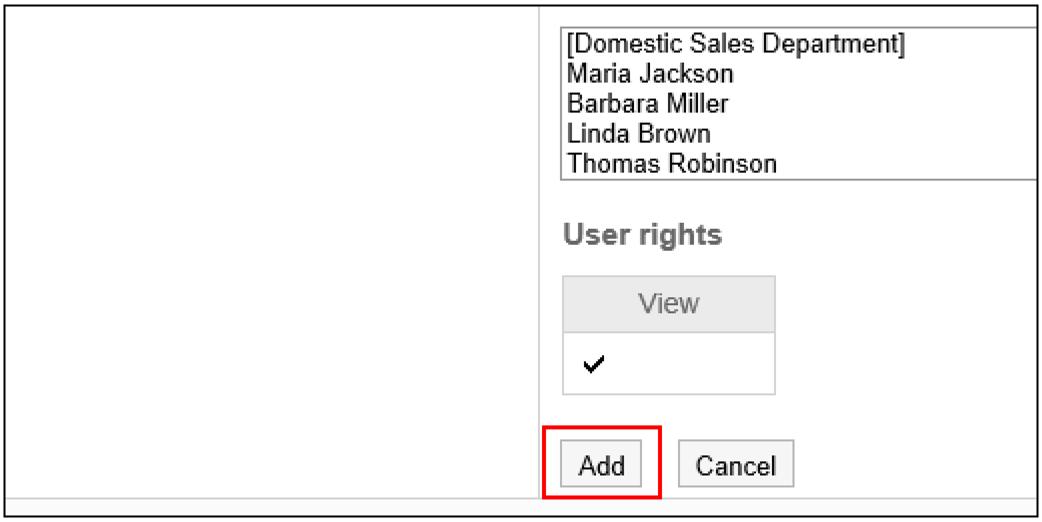
10. **On "Add new entry" screen, select the department, user, or role to set permissions, and click "Add".**



To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

11. Under "User rights", check the permissions to allow, and then click "Add".



Deleting User Rights

Delete permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

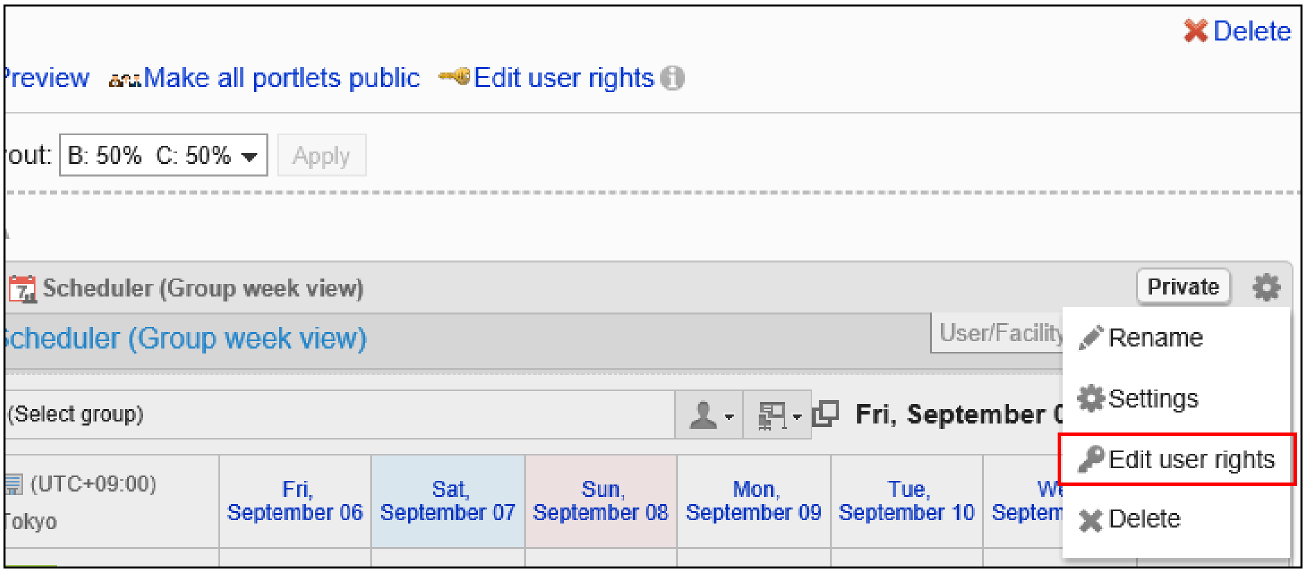
- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

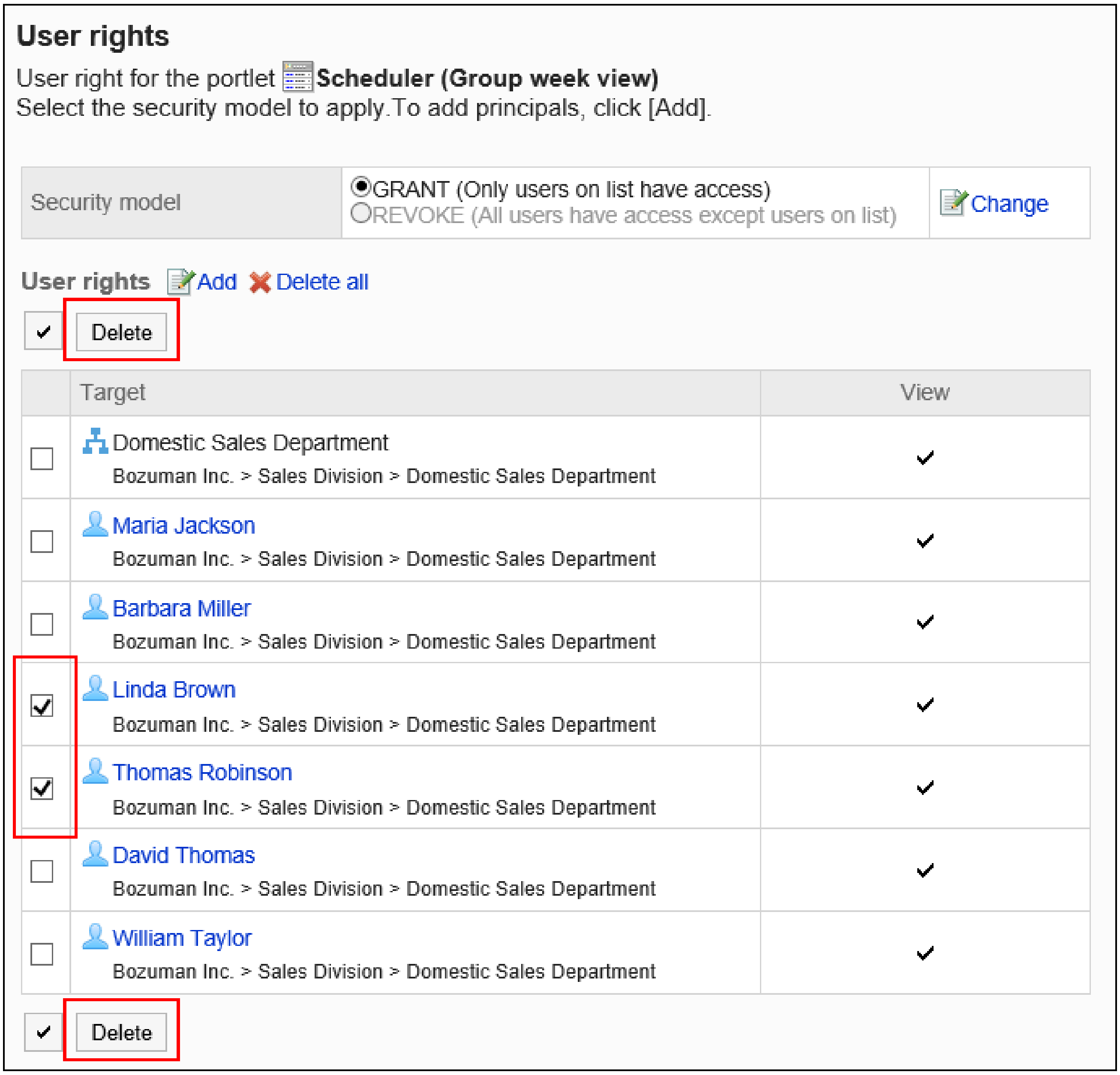
Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, select a portal.**
7. **On the screen for portal details, click to change the permissions on the gear icon for the portlet to delete its permissions.**



8. **On "User rights" screen, select the check boxes of the permissions to delete, and then click "Delete".**



9. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

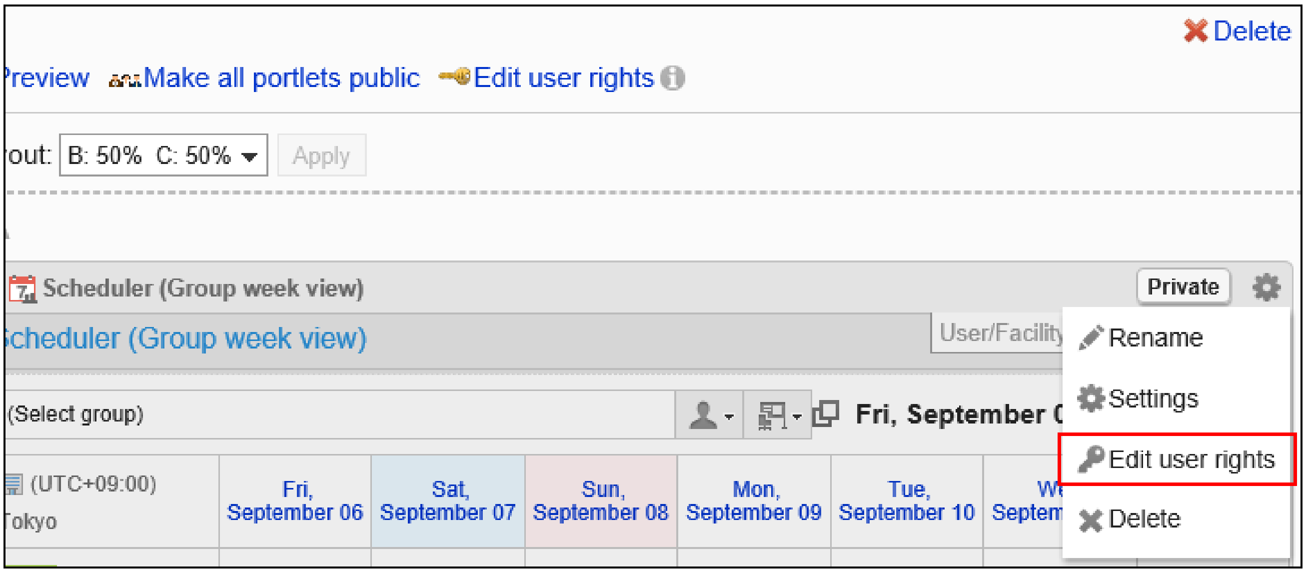
3. **Select "Application settings" tab.**

4. Click **Portal**.

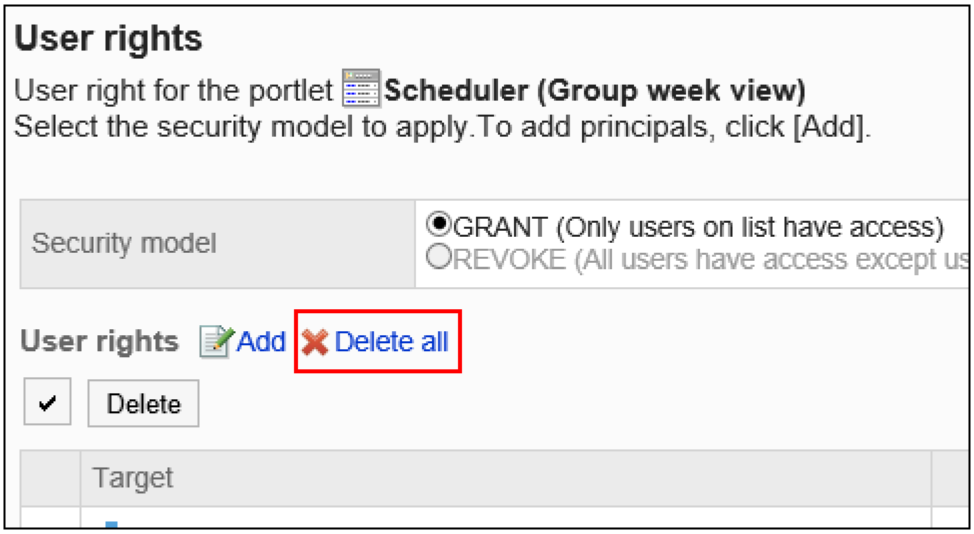
5. Click the item to show a portal list.

6. On the screen for a portal list, select a portal.

7. Click to delete the permissions on the gear icon for the portlet to delete its permissions.



8. On "User rights" screen, click "Delete all".



9. Click "Yes" on "Delete all user rights" screen.

2.1.1.6. Configuring Portlets

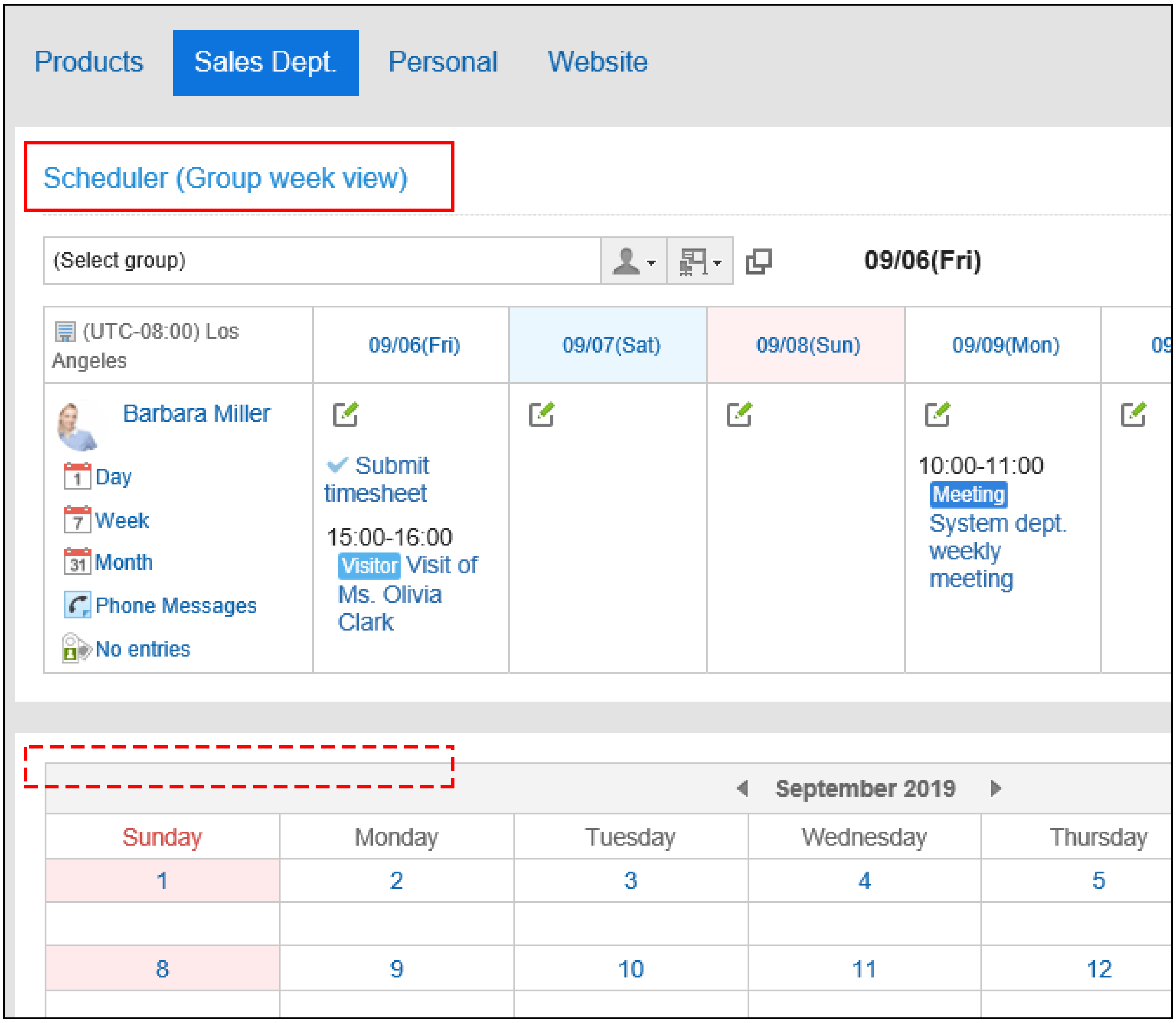
Change portlet configurations.

Changing Portlet Display Names

Change the display name of portlets placed in portals.
However, the following portlets cannot change their names.

- Application Menu portlet
- Notices portlet
- Calendars portlet
- Quick Send portlet
- HTML portlet portlet

On the user screen, only the display name appears on the portlets. The portlets that you cannot change their display names have no names on them.



If the display name is not changed, the portlet name appears as the display name.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

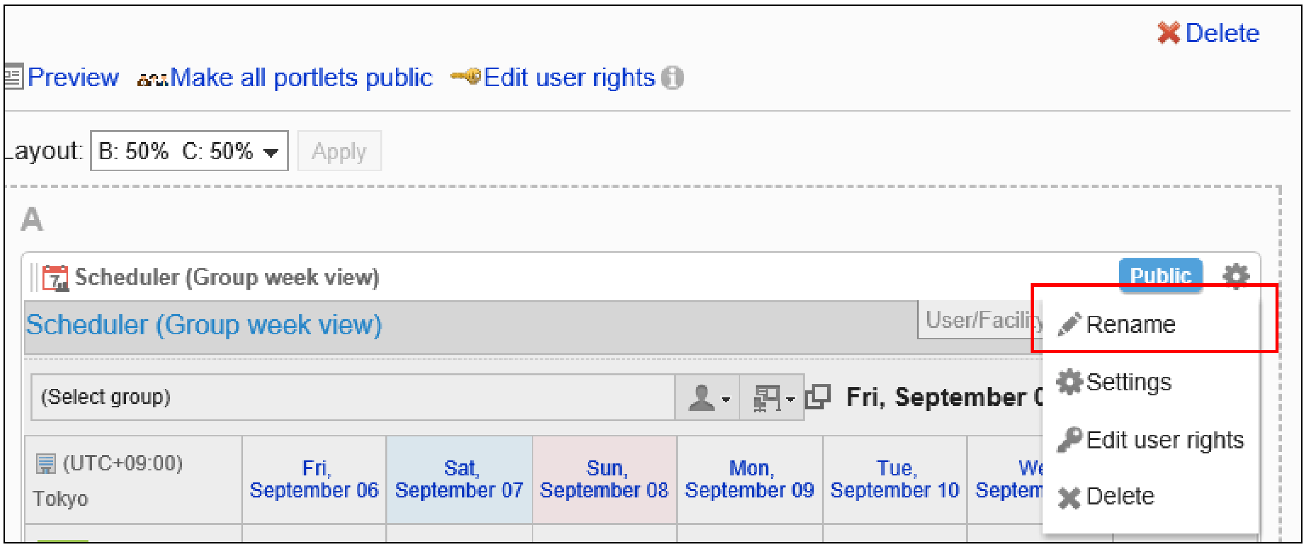
3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to show a portal list.**

6. **On the screen for a portal list, select a portal.**

7. On the screen for portal details, click to change the portlet name on the gear icon for the portlet.



8. On "Change portlet display name" screen, enter "Display Name" field.

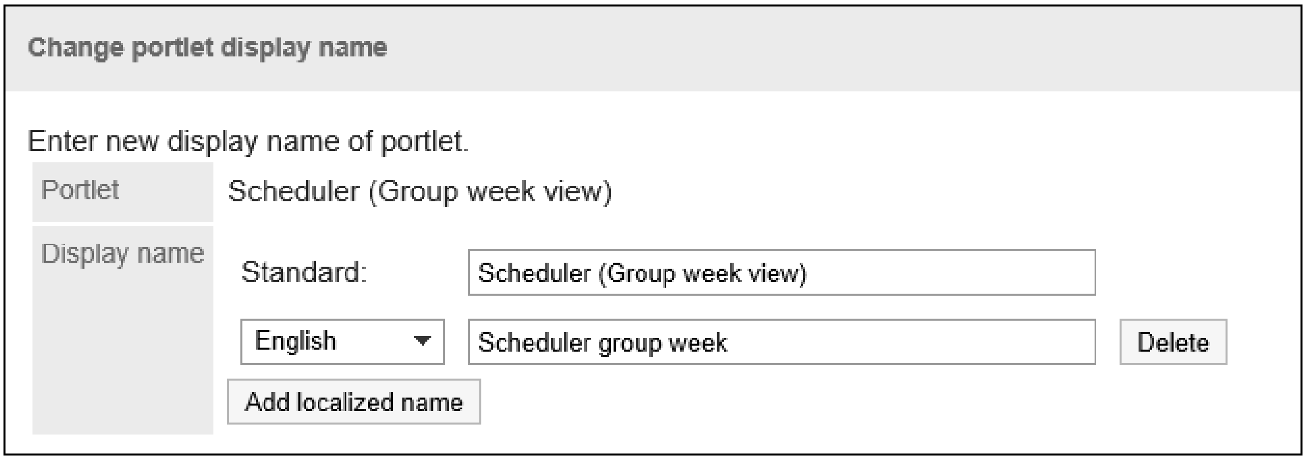
Clicking "Add localized name" allows you to set display names in multiple languages.

If you do not set the display name in the user preference language, the default display name is displayed.

The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese

  Displayed in Traditional Chinese.



You can set only the category name or the folder name to the display name for the following portlets:

- Bulletin Board portlet
- Cabinet portlet
- E-mail portlet
- Workflow portlet
- MultiReport portlet

- Messages portlet
- Bookmarks portlet

9. Confirm your settings and click "Save".

Changing Portlet Settings

Change portlet configurations.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

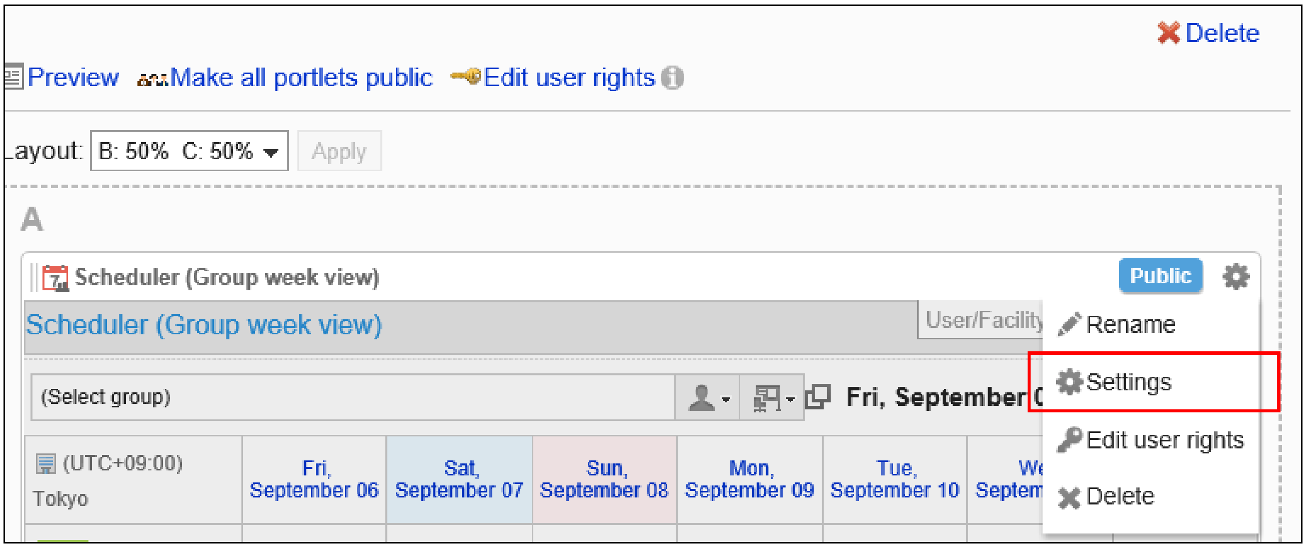
3. Select "Application settings" tab.

4. Click Portal.

5. Click the item to show a portal list.

6. On the screen for a portal list, select a portal.

7. On the screen for portal details, click to set for the gear icon for the portlet to change its settings.



8. On the screen to set portlets, you can change the settings as necessary.

The items that can be set differ depending on the portlet type.

For details, refer to Portlet Types and Settings(722Page).

9. Confirm your settings and click "Save".

2.1.1.7. Making Portlets Public

Set portlet status as Public or Private for each portlet.

Private portlets are not displayed on the user's screen.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

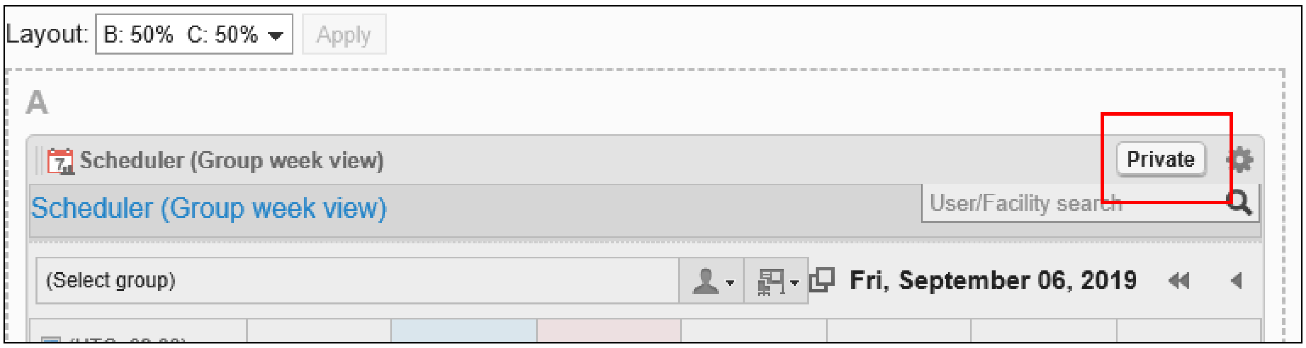
3. Select "Application settings" tab.

4. Click Portal.

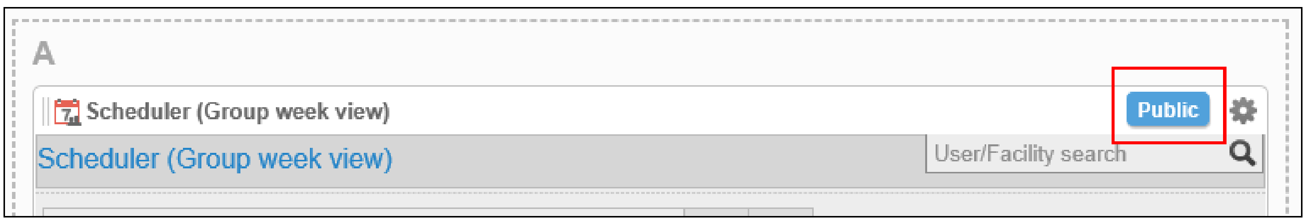
5. Click the item to show a portal list.

6. On the screen for a portal list, select a portal.

7. On the screen for portal details, click "Private" for the portlet to make public.

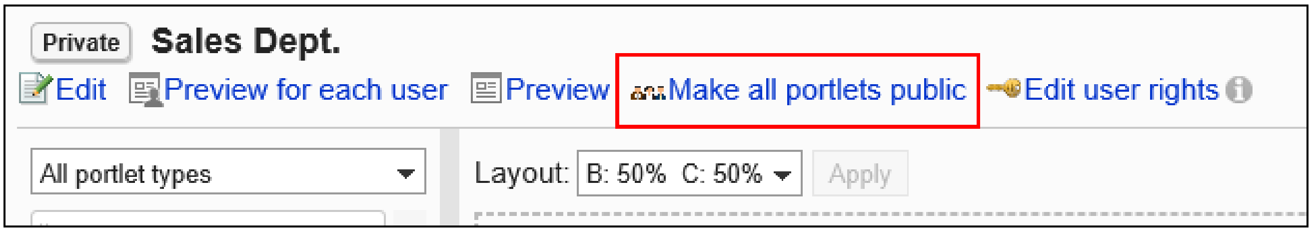


When you click "Public", the portlet becomes private.



Note

- Clicking the item to make all the portlets public on the screen for portal details makes the portlets placed in the portal public.



2.1.1.8. Previewing Portals

Before making the portal public, you can preview the appearance of the portal on user screens.

Specifying Users to Preview Portals

Select the user to use to view the portal, then preview the portal displayed on the user's screen.
The preview screen displays e-mails and messages of the user who are running the preview, rather than the selected user.
Applications to which the selected user does not have access permission are not displayed in the Application menu portlet.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

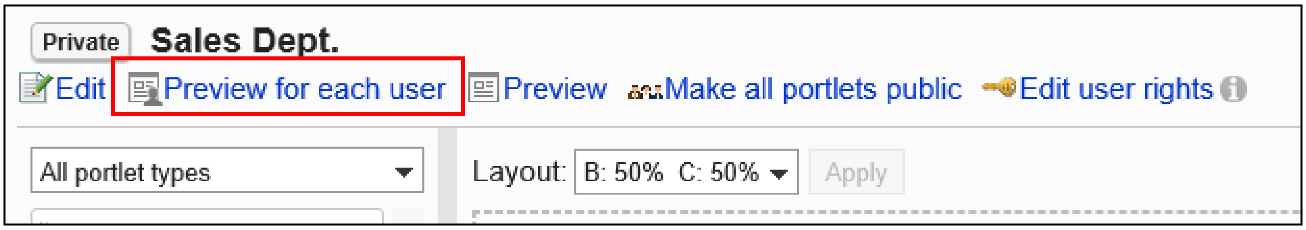
3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to show a portal list.**

6. **On the "Portals" screen, click the portal name for the portal to preview.**

7. **On the "Portal details" screen, click "Preview for each user".**

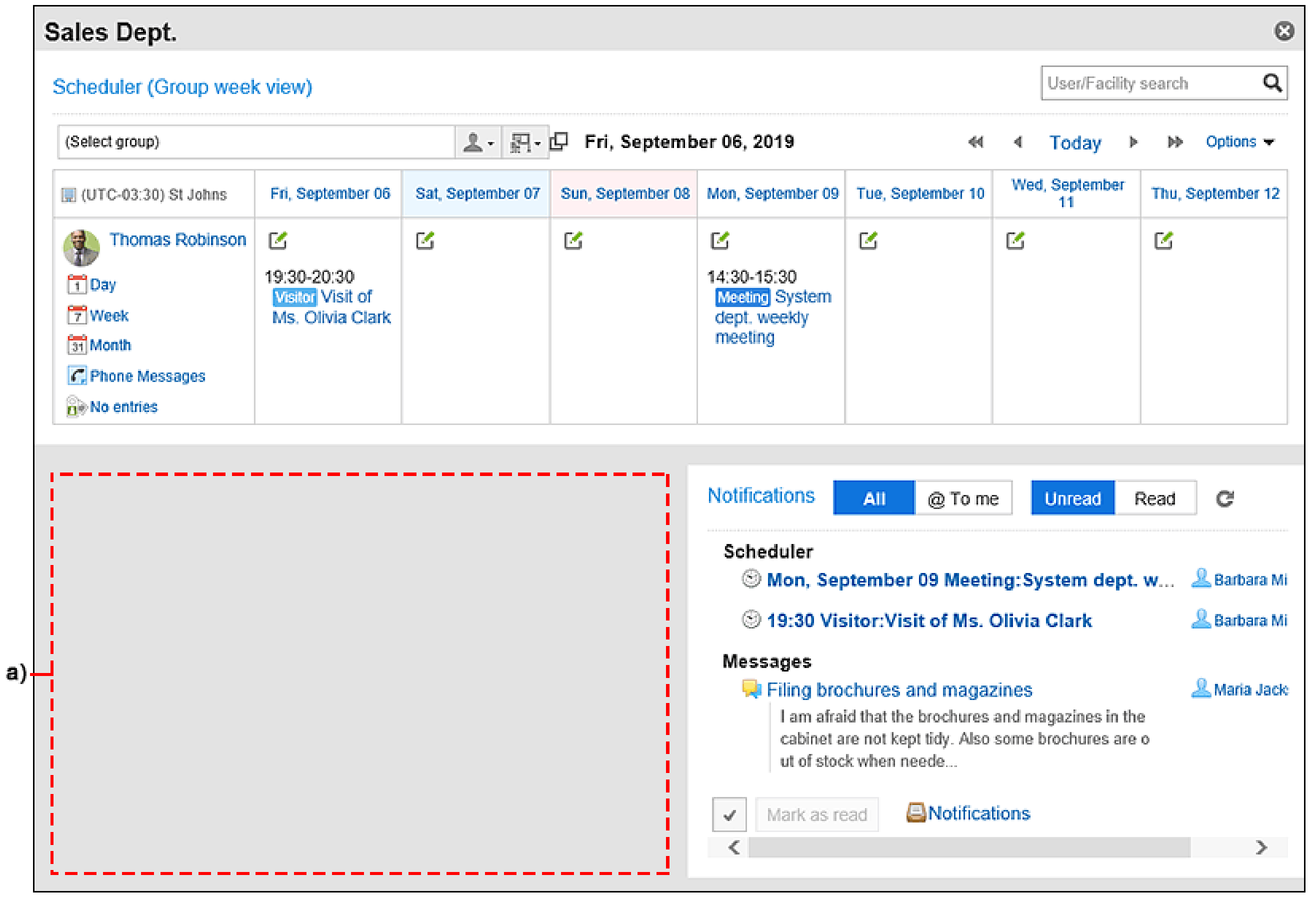


8. **On the screen to show a preview for selected user, select the user to use to view the portal.**

The portal appears on the preview screen.

9. **On the preview screen, check the layout of the portlet and whether or not the permissions for the portlet are applied.**

To end the preview, click the icon.



a): Portlets to which the specified user does not have view permission do not appear.

Previewing Portals without Specifying Users

Preview the portal that is displayed on the screen for the user currently performing the preview.

The preview screen displays e-mails and messages of users who are running the preview.

Applications to which the user does not have access permission are not displayed in the Application menu portlet.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

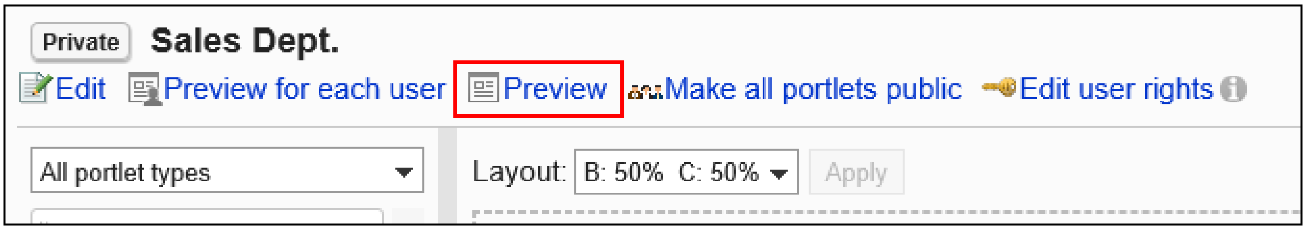
3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to show a portal list.**

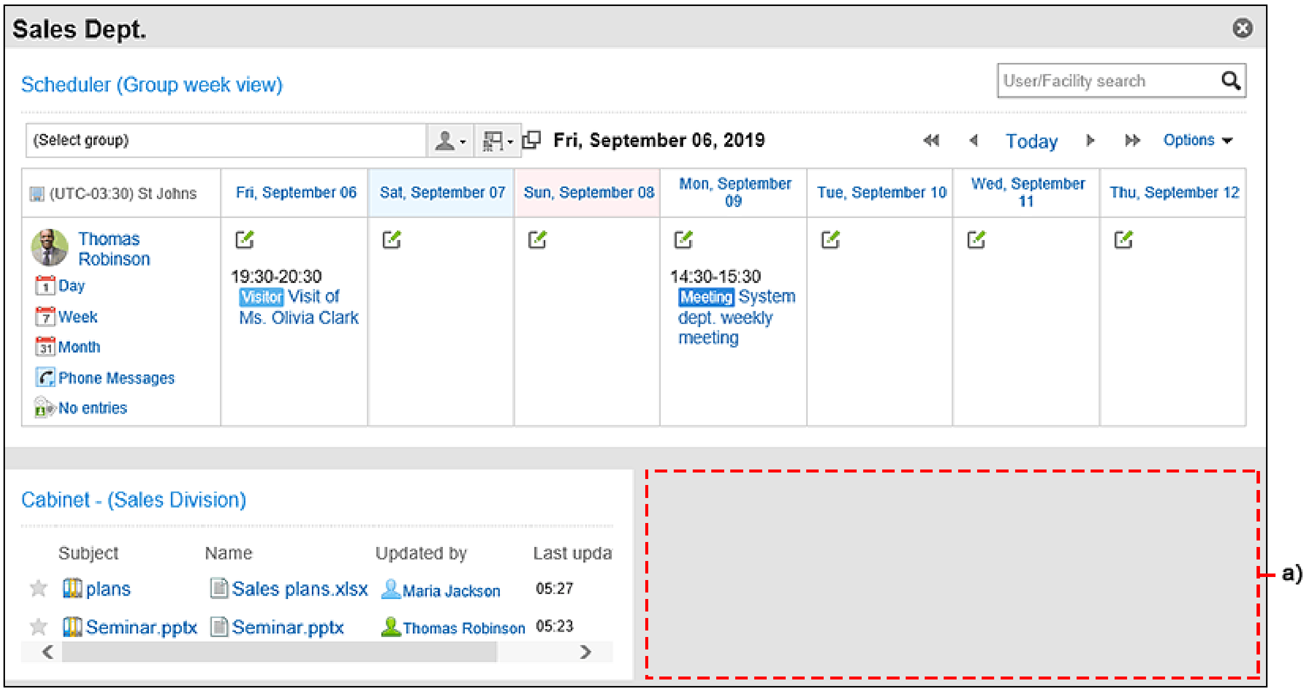
6. **On the "Portals" screen, click the portal name for the portal to preview.**

7. **On the screen for portal details, click "Preview".**



8. **On the preview screen, check the layout of the portlet and whether or not the permissions for the portlet are applied.**

   To end the preview, click the icon.



a): Portlets to which the current user does not have view permission do not appear.

2.1.1.9. Deleting Portals

Delete portals.

Caution

- After deleting portals, they cannot be restored.

Deleting Portals One by One

Delete one portal at a time.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to show a portal list.**

6. **On the screen for a portal list, click the portal name for the portal to delete.**

7. **On the screen for portal details, click "Delete the portal".**

8. **Click "Yes" on the screen to delete portals.**

Deleting Multiple Portals in Bulk

Select the portals to delete them together.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

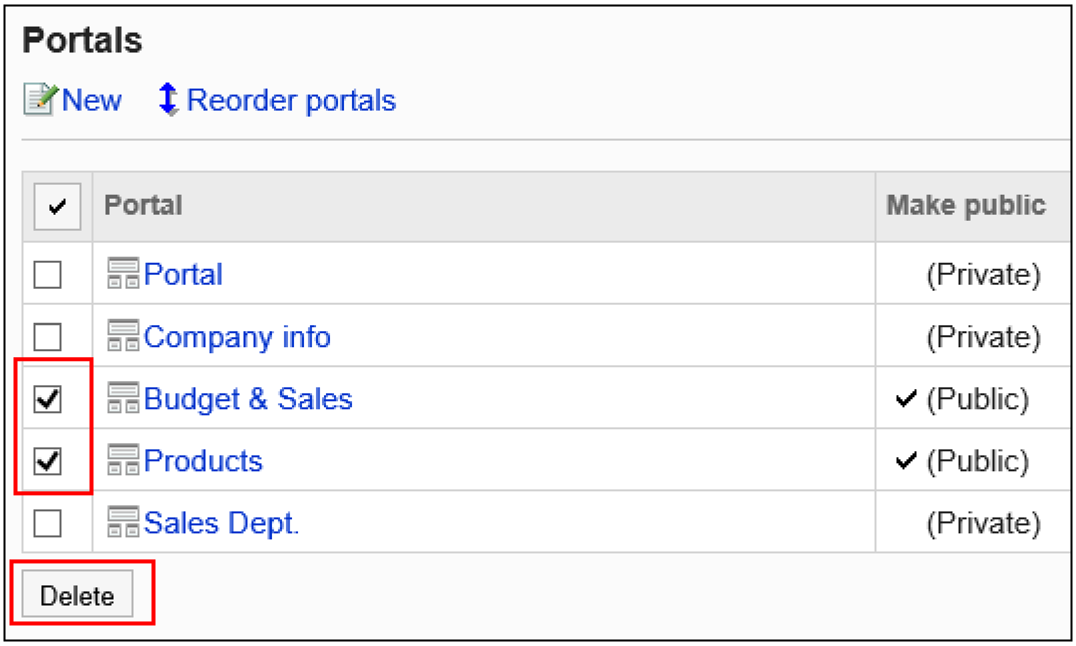
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to show a portal list.**

6. **On the screen for a portal list, select the check box for the portal to delete, and then click "Delete".**



7. **Click "Yes" on the screen to delete portals in bulk.**

2.1.1.10. Portal View Settings

You can set the following settings for appearance of portals:

- The default portal appears when users login to Garoon
- Users who can set up the default portal
- Portal Display Order

Setting up the Default Portal

Set the default portals appear when users login to Garoon for each department.

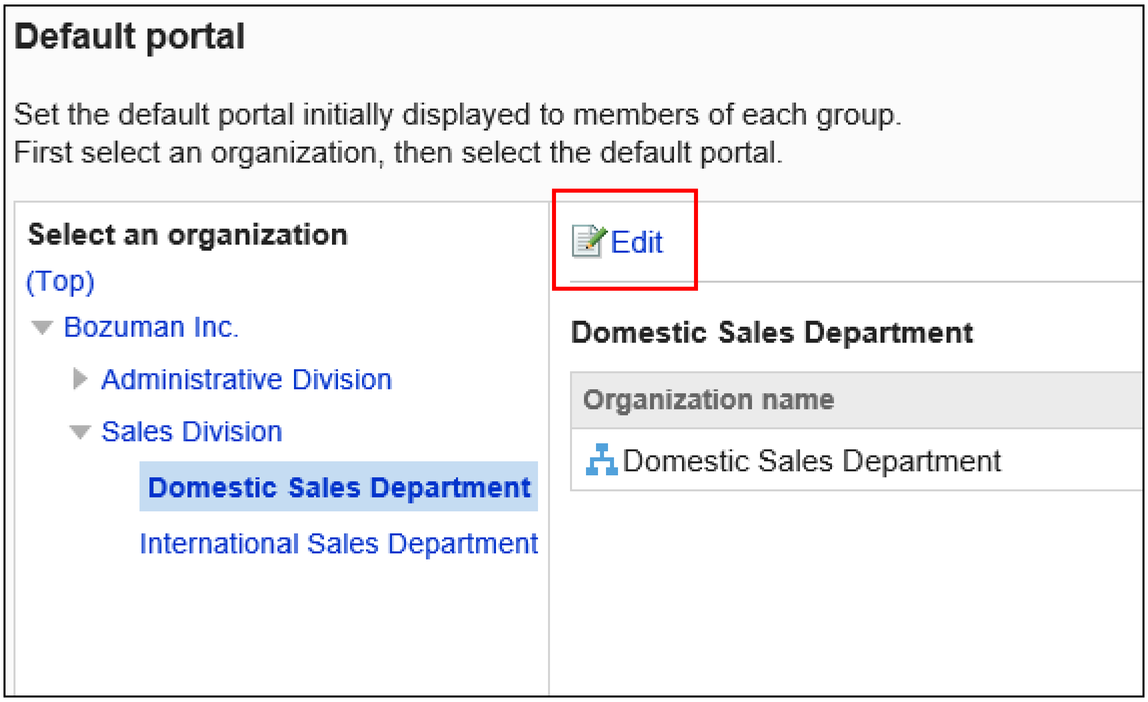
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**

4. Click **Portal.**

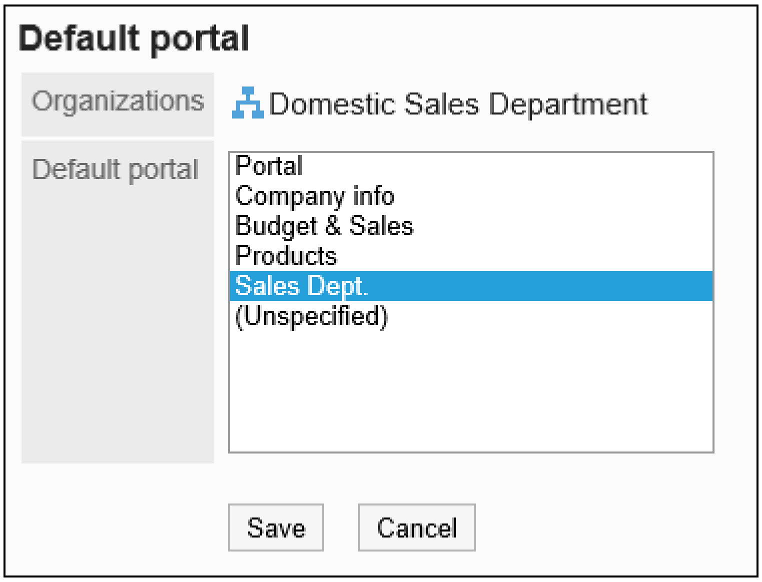
5. Click "Default portal".

6. On the "Default portal setting" screen, select the department, and click "Save".



If you select "(Top)", the settings are applied to all departments. However, the settings for each department override.

7. Select the portal to show at first login, and then click "Save".



If you select "(Not set)", the portal that is set at the top of Portal display order is displayed first.

Setting Permissions for Default Portal Setting

You can set permissions for default portal setting based on organizations, users, and roles.
The permissions for default portal settings vary depending on the security model.
The default setting is set to "GRANT (Only users on list have access)". Therefore, all users are prohibited to use the settings.
For information on user rights, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Users who have been granted permissions can set their default portal on the personal settings.

Adding Permissions

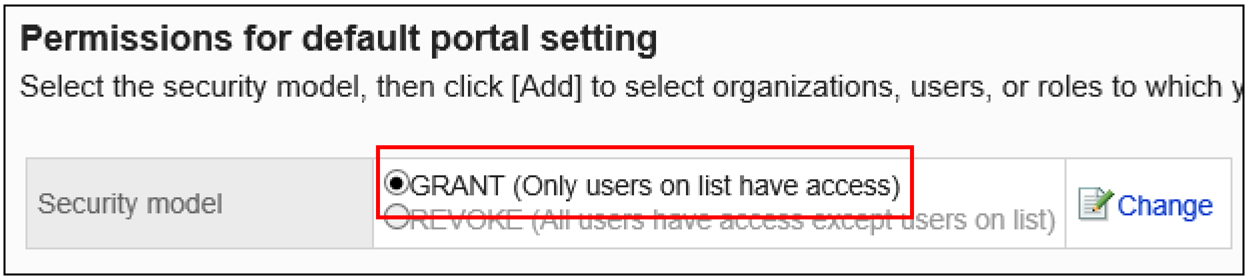
The following steps explain how to set permissions if the security model is set as "GRANT (Only users on list have access)".

Caution

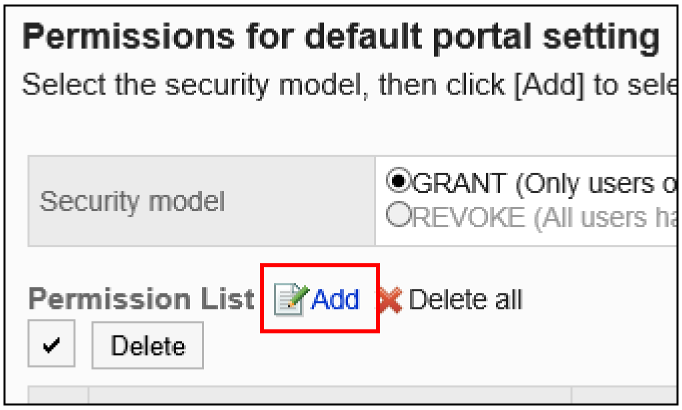
- If you change your security model, configured permissions before changing the security model are initialized.

Steps:

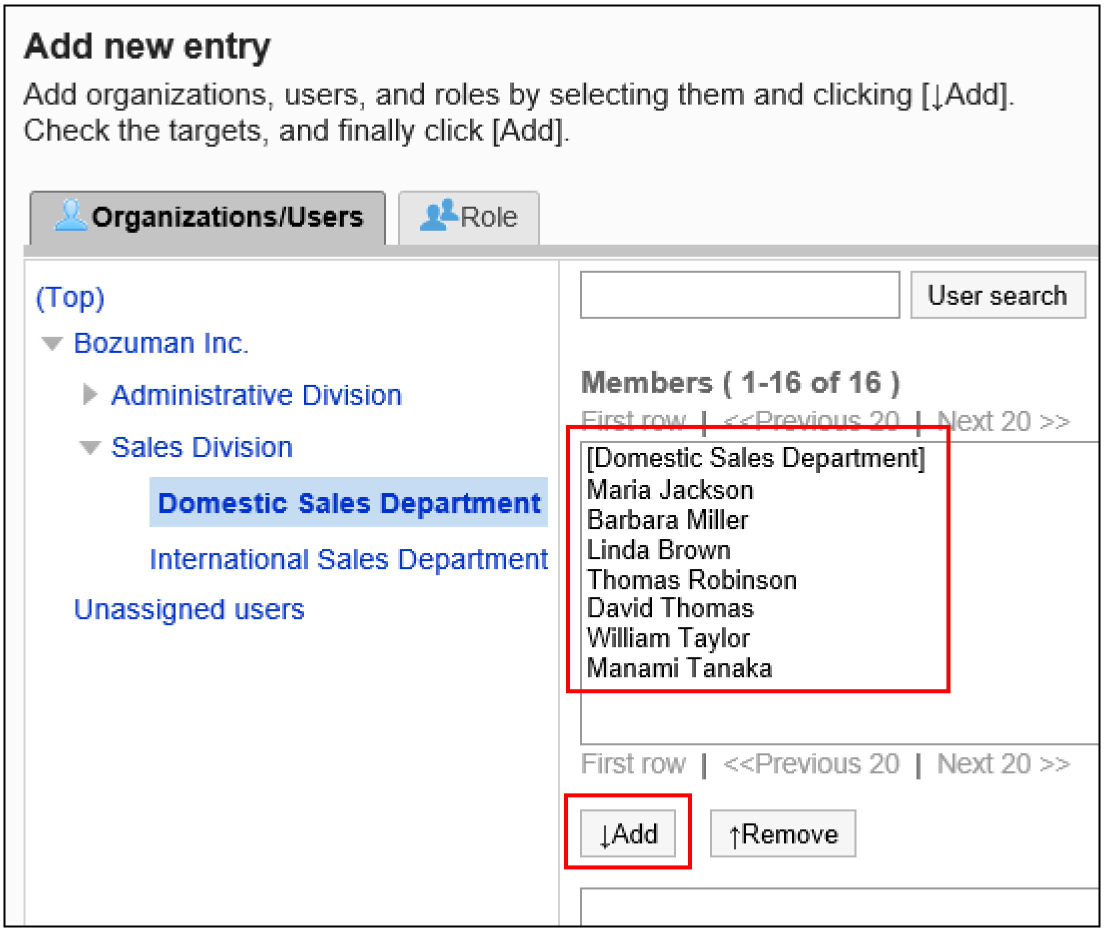
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Portal".**
5. **Click "Permissions for default portal setting".**
6. **On "Permissions for default portal setting" screen, confirm that the security model is "GRANT (Only users on list have access)".**
   If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).



7. **Click "Add".**

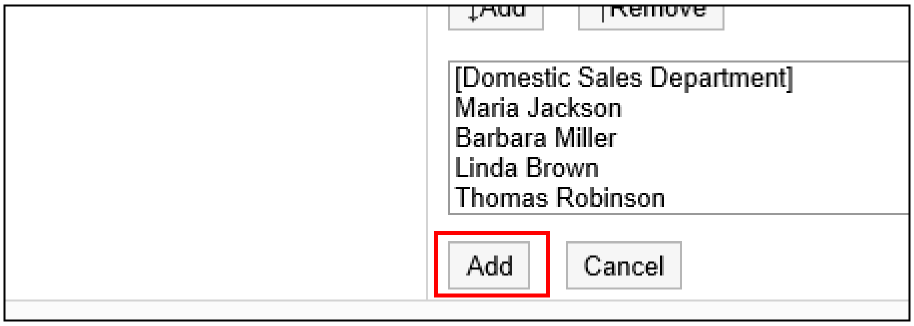


8. **On the "Add Permissions" screen, select the department, user, or role to set permissions, and then click "Add".**



To select a role, switch the view to the Roles tab.
After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

9. Click "Add".



Deleting Permissions

Delete permissions granted to users or departments.
If you delete permissions, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the permissions or users who belonged to the departments or roles that lost permissions no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the permissions or users who belonged to the departments or roles that lost permissions can now work with items they prohibited to use.

Selecting and Deleting Permissions

You can select permissions and delete them.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

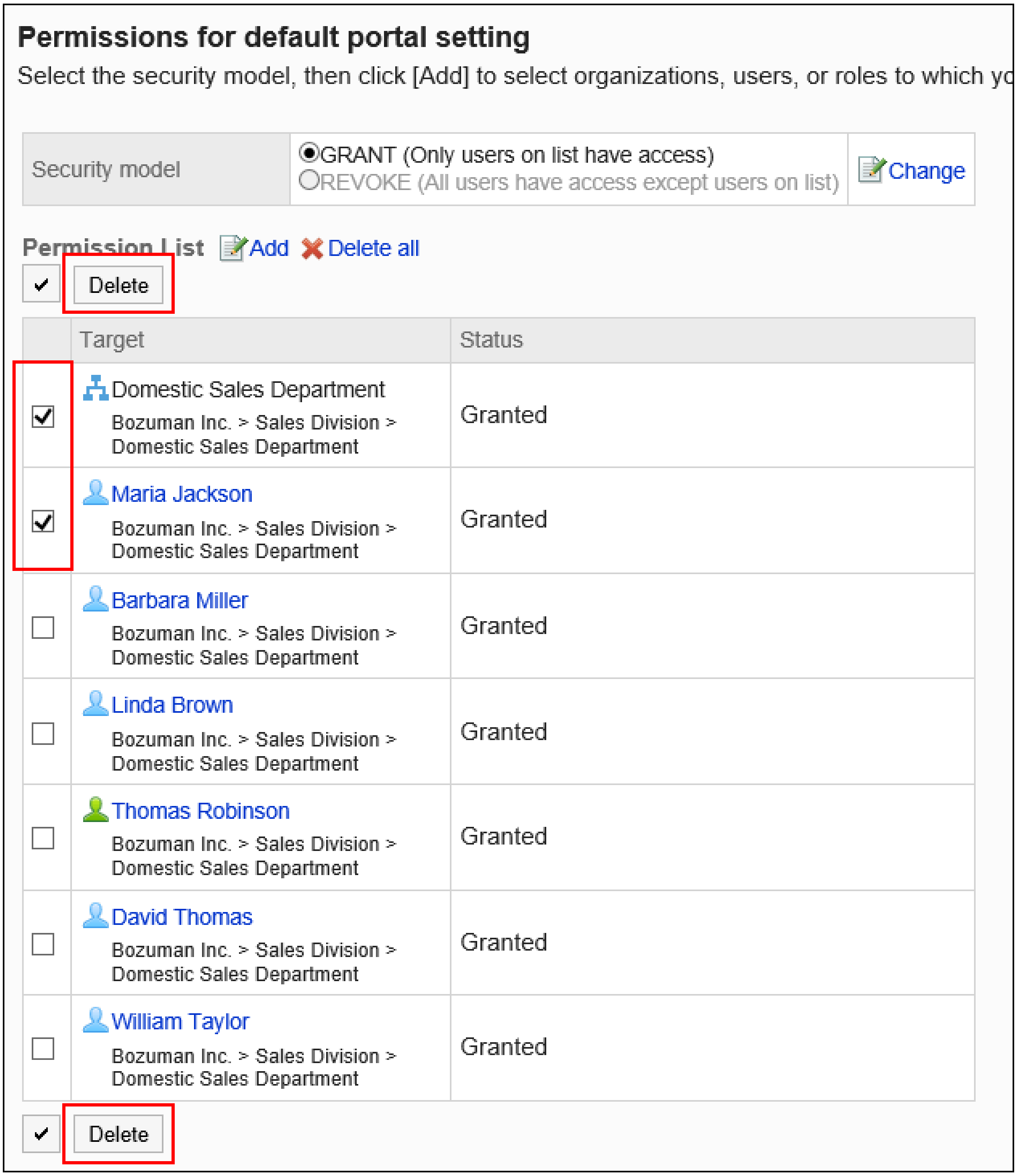
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Portal".

5. Click "Permissions for default portal setting".

6. **On "Permissions for default portal setting" screen, select the check box for the permissions to delete, and click "Delete".**



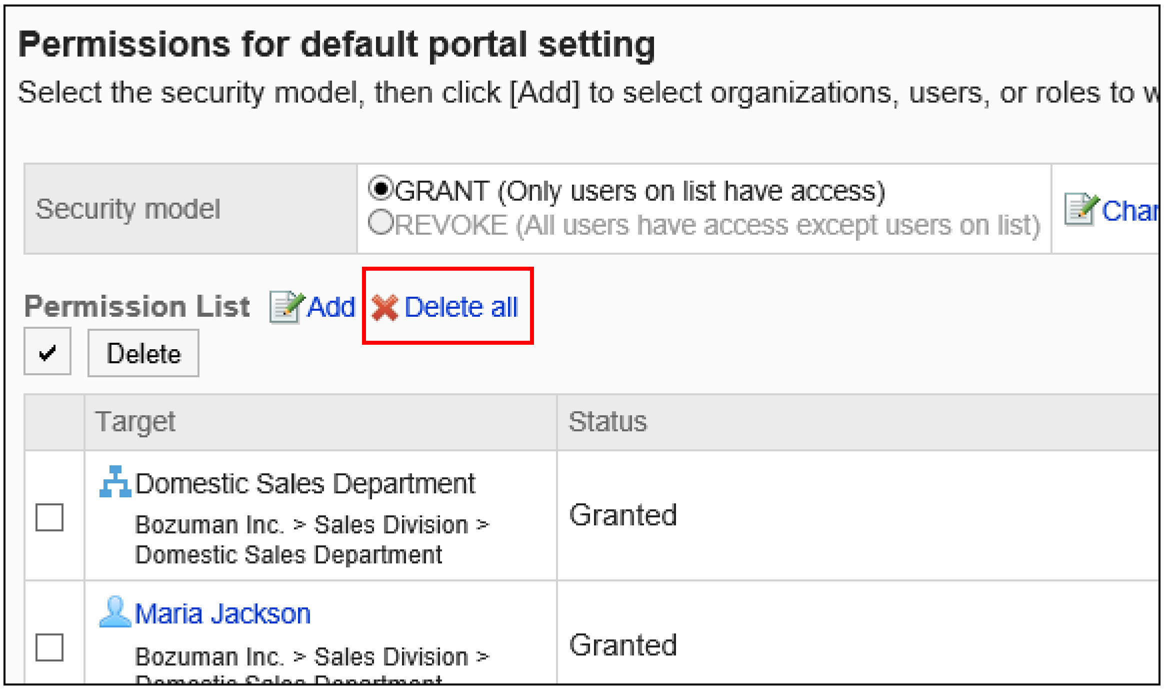
7. **Click "Yes" on the "Delete all Permissions" screen.**

Deleting All Permissions

You can delete all permissions.

Steps:

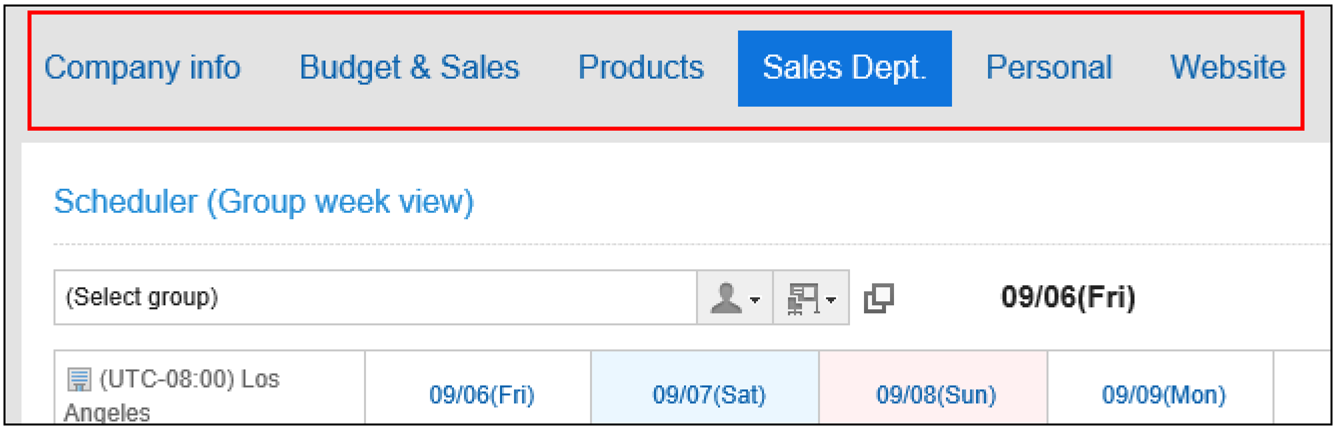
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "Permissions for default portal setting".**
6. **On "Permissions for default portal setting" screen, click "Delete all".**



7. **Click "Yes" on the "Delete all Permissions" screen.**

Reordering Portals to Show

Change the order in which the tabs appear on users ' screens.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

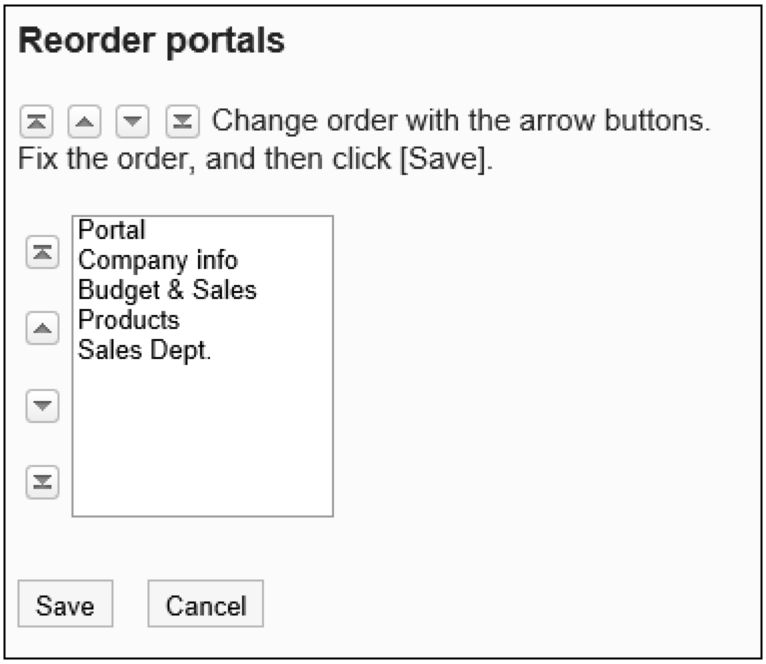
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click the item to reorder portals.**

6. **On the screen to reorder portals, you can change the order in which portals are displayed.**



7. **Confirm your settings and click "Save".**

Note

- You can also reorder portals by clicking the item to reorder portals on the portal page.

2.1.1.11. Making Portals Public

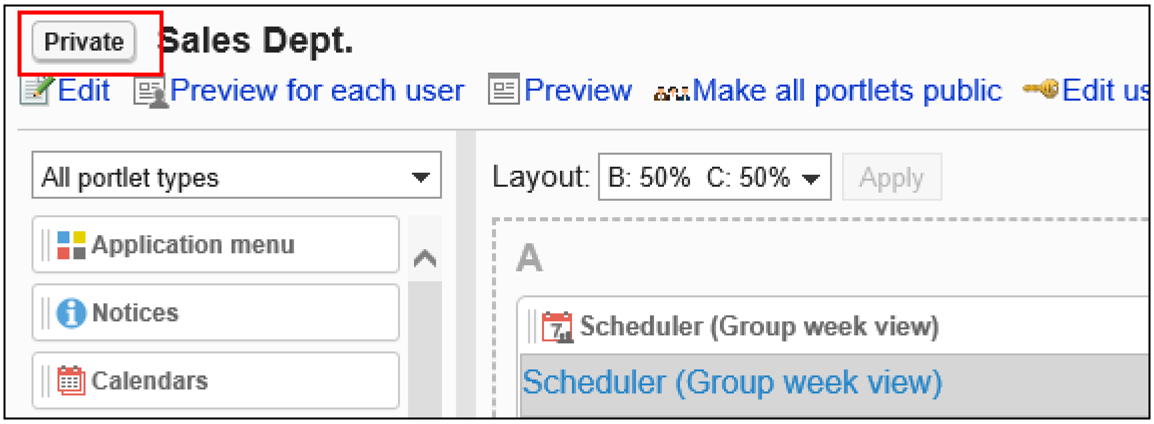
Make the portal public.

Private portals are not displayed on the user's screen.

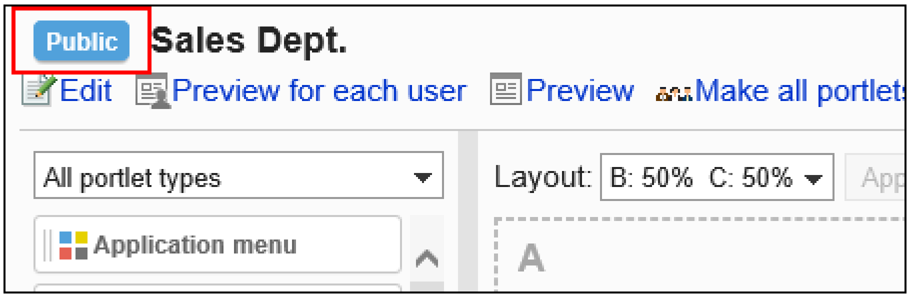
Private portals are not displayed on the user's screen even when the portlets placed on them are public.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item to show a portal list.**
6. **On the screen for a portal list, select a portal.**
7. **On the screen for portal details, click "Private" for the portal to make public.**



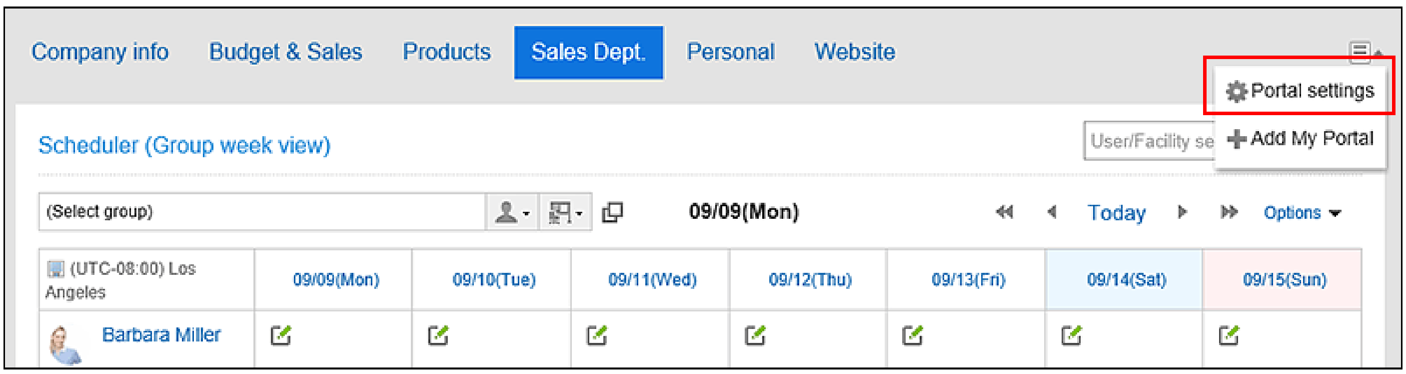
When you click "Public", the portal becomes private.



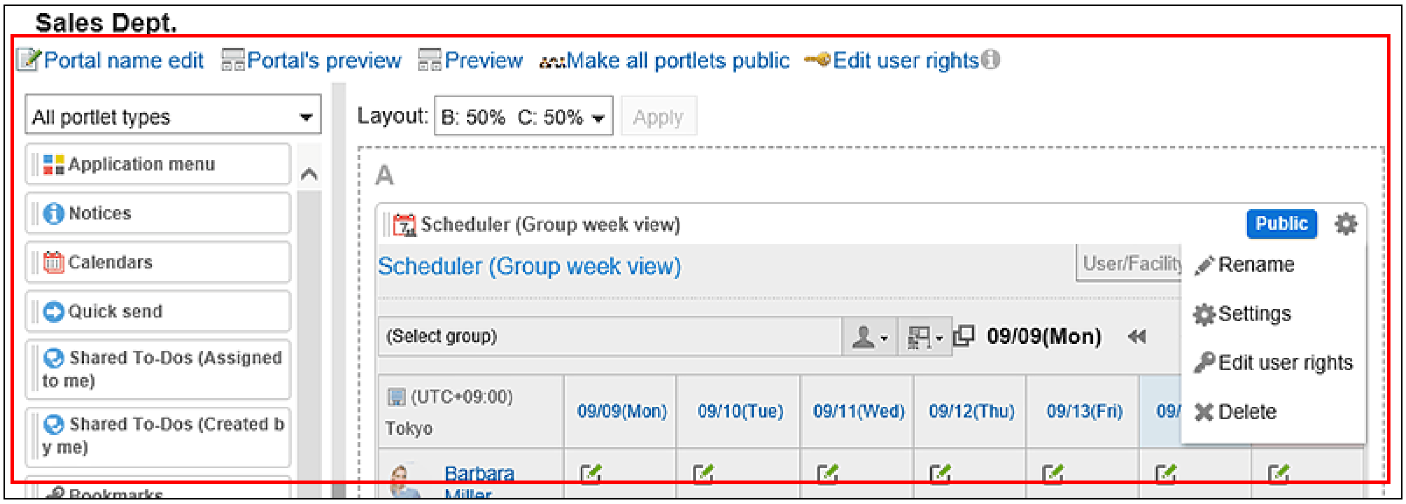
2.1.1.12. Setting up Operational Administrative Privileges for Portals

Operational administrators are administrators who are granted operational administrative privileges to manage portals by the system administrator.

If you are assigned as an operational administrator, clicking the icon displays the portal settings and you can manage the portals on the user screen.



When you click "Portal setting", the screen for portal details appears.



Operational administrators can do the following tasks:

- Changing Portal Names:

  For details, refer to Changing Portal Names(638Page).
- Preview for each user:

  For details, refer to Previewing Portals Specifying Users to View(664Page).
- Preview:

  For details, refer to Previewing Portals without Specifying Users to View(666Page).
- Make All Portlets Public:

  For details, refer to Making Portlets Public(663Page).
- Setting Access Permissions:

  For details, refer to Setting Access Permissions for Portal(639Page).
- Layout:

  For details, refer to Arranging Portlet Layouts(646Page).
- Place Portlets in Portals:

  For details, refer to Deploying Portlets(646Page).
- Switch Portlets from or to Public or Private

  For details, refer to Making Portlets Public(663Page).
- Gear icon:

  A menu on portlets appears. You can do the following actions:
  - Rename display names for portlets:

    For details, refer to Changing Portlet Display Names(659Page).
  - Settings:

    For details, refer to Changing Portlet Configurations(662Page).
  - Change permissions:

    For details, refer to Setting Access Permissions for Portlets(651Page).
  - Delete:

    For details on the procedure, refer to Deleting Portlets Placed in Portals(650Page).

Note

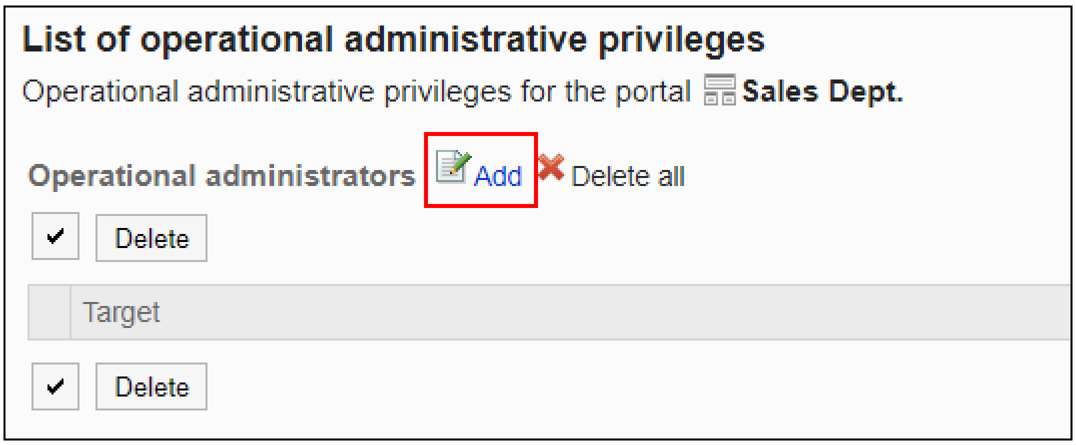
- Operational administrators cannot do the following:
    - Deleting Portals
    - Making Portals Public
- **If the Drag and Drop Function Is Disabled in Internet Explorer**
  If you deselect "Display intranet sites in Compatibility View" in the Compatibility View settings in Internet Explorer, you can use the drag and drop function.

Setting Operational Administrative Privileges

Set operational administrative privileges for each portal.

Steps:

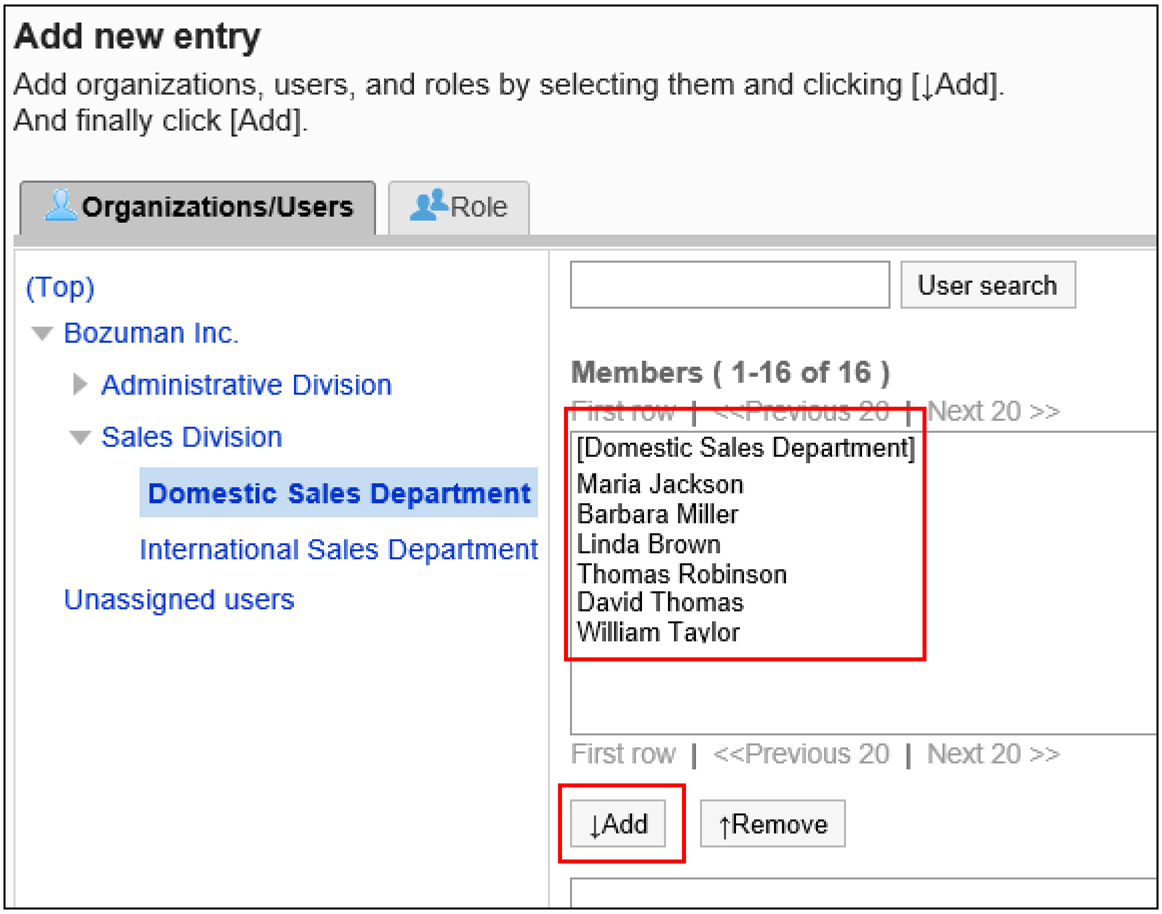
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "Operational administrative privileges for portals".**
6. **On the screen for operational administrative privileges for portals, select portals.**
7. **On the screen for "List of operational administrative privileges", click Add.**



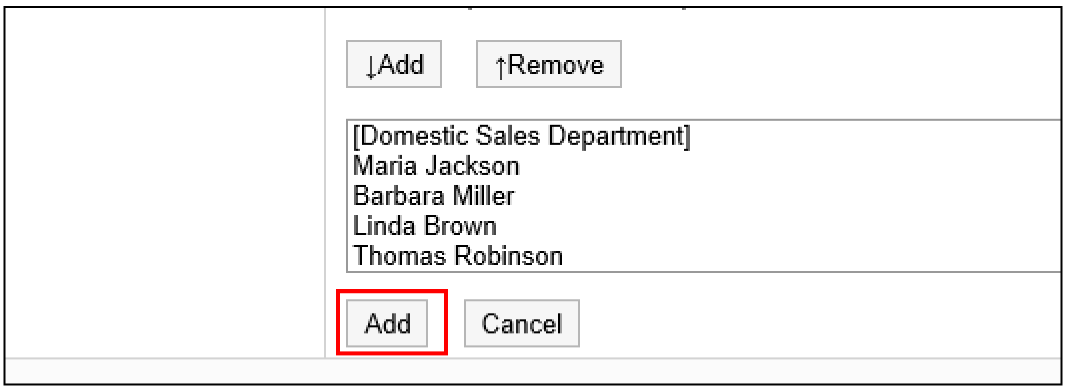
8. On the screen to add operational administrative privileges, select the department, user, or role to set privileges, and then click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. Click "Add".



Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

Caution

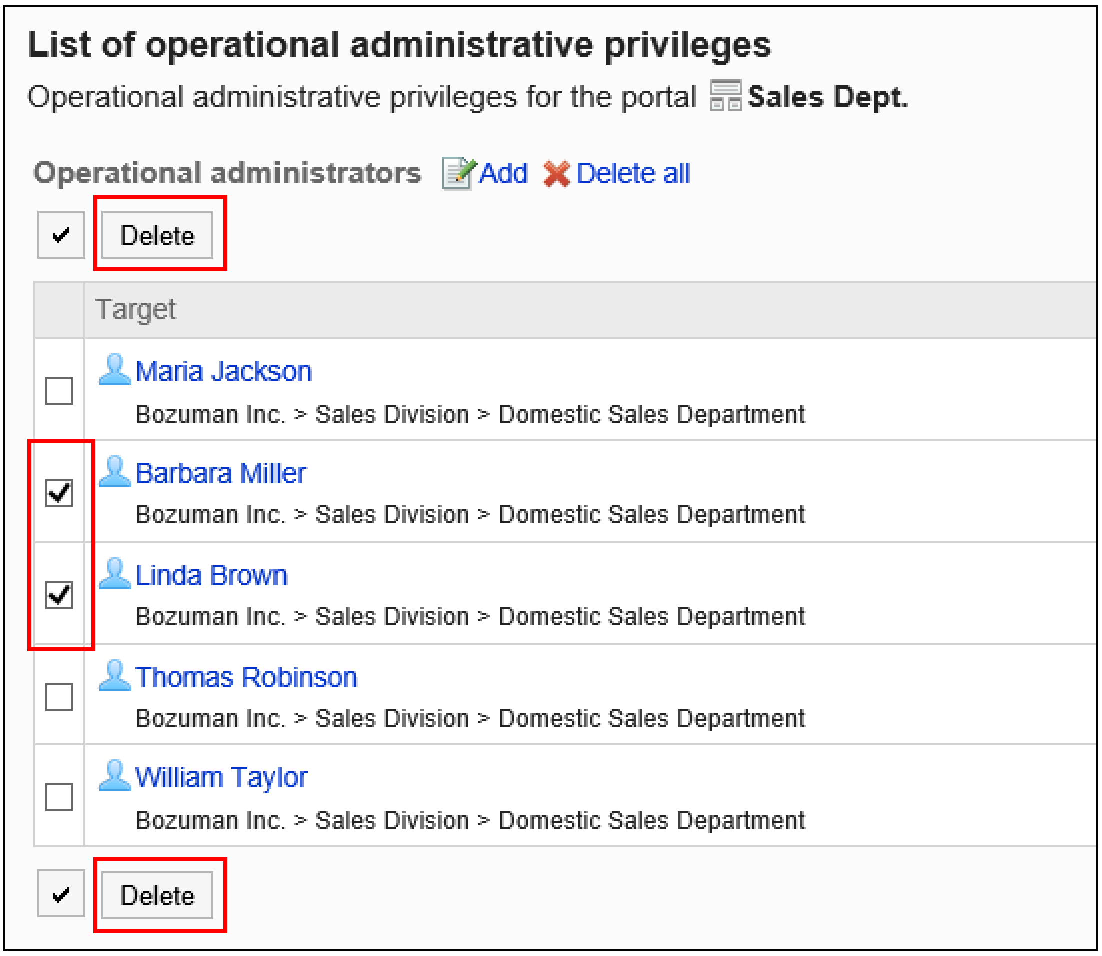
- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "Operational administrative privileges for portals".**
6. **On the screen for operational administrative privileges for portals, select portals.**
7. **On the screen for "List of operational administrative privileges", select the check boxes of the operational administrative privileges to delete, then click Delete.**



8. **Click "Yes" on the screen to delete all operational administrative privileges.**

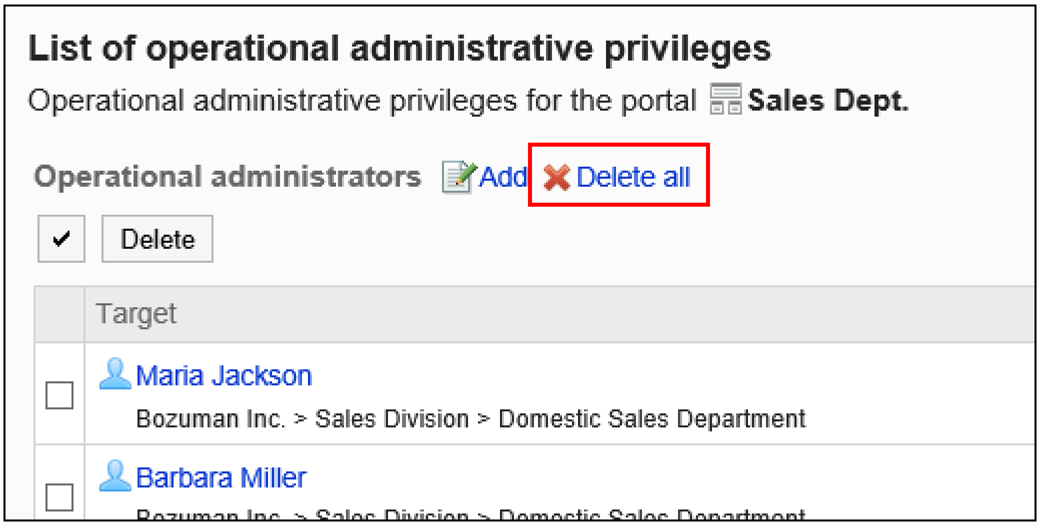
Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "Operational administrative privileges for portals".**
6. **On the screen for operational administrative privileges for portals, select portals.**

7. **On the screen for "List of operational administrative privilege", click Delete all.**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.1.1.13. My Portal Settings

My Portal is a portal that users can create by placing required or frequently used portlets in a convenient place for their own use. My Portals can not be shared with other users.
To easily create My Portal, the application administrator can set up a My Portal template.

Creating My Portal Template

Change the template that users can use to create their own My Portals. This template are the default My Portal for users.
In the template, you can add portlets for users.
You can set up only one template.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click Personal portal template.**

6. **On the "Personal portal template" screen, create a template for a personal portal.**

   The way to add or change portlets in templates is the same as working with regular portlets.

   For details, refer to the following page:

   Deploying Portlets(646Page)

   Configuring Portlets(659Page)

Initializing My Portal Template

Initialize the My Portal template.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

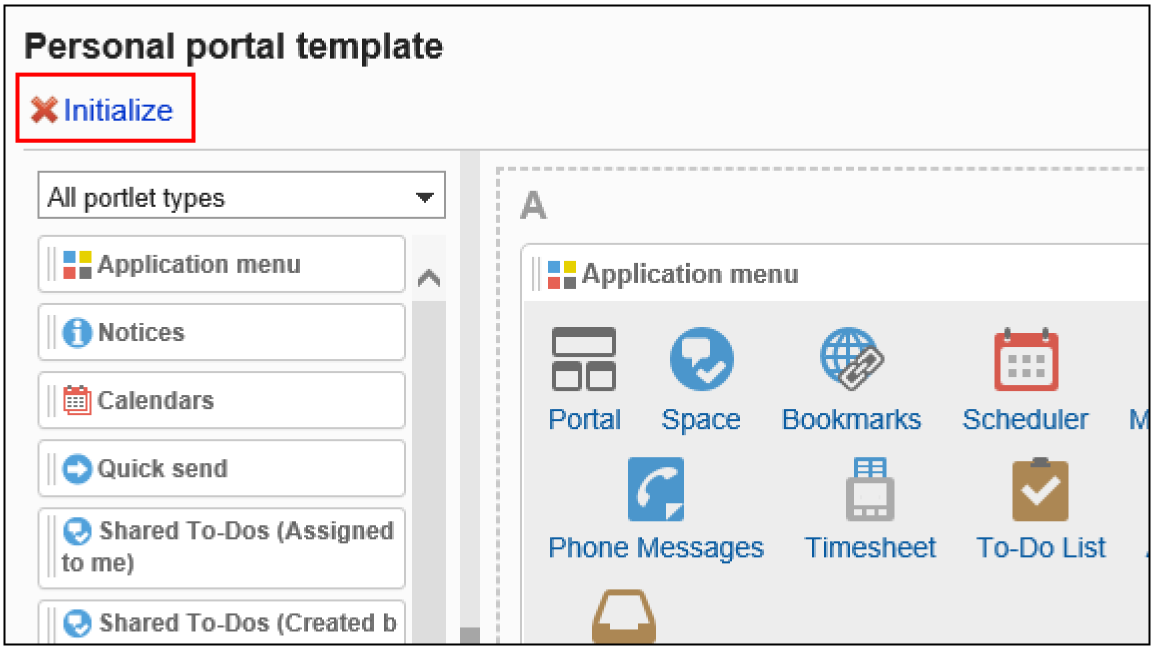
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click Personal portal template.**

6. **On the "Personal portal template" screen, click Initialize.**



7. **Click Yes on the "Initialize personal portal template" screen.**

Setting up Permissions for My Portals

For the My Portal, set the following permissions for departments, users, or roles.

- Permission

The permissions for My Portal vary by the security model applied to the portal.
The default setting is set to "REVOKE (All users have access except users on list)". Therefore, all users are allowed to use their own My Portals.
For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

The following steps explain how to set permissions if the security model is set as "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing the security model are initialized.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. Click "System settings".

3. Select "Application settings" tab.

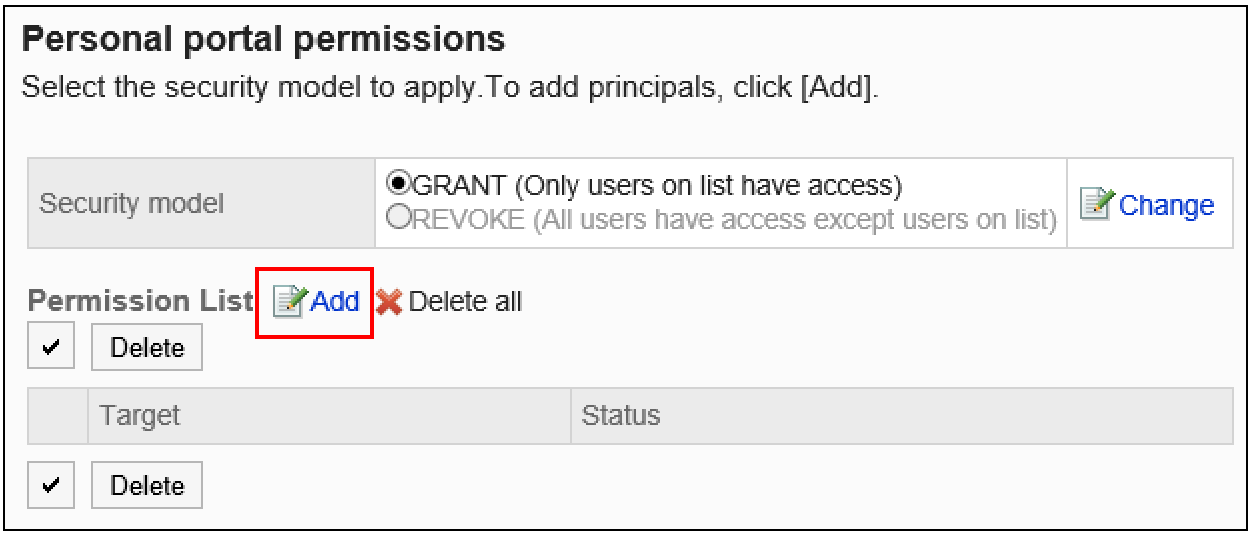
4. Click Portal.

5. Click the item for permissions for My Portal.

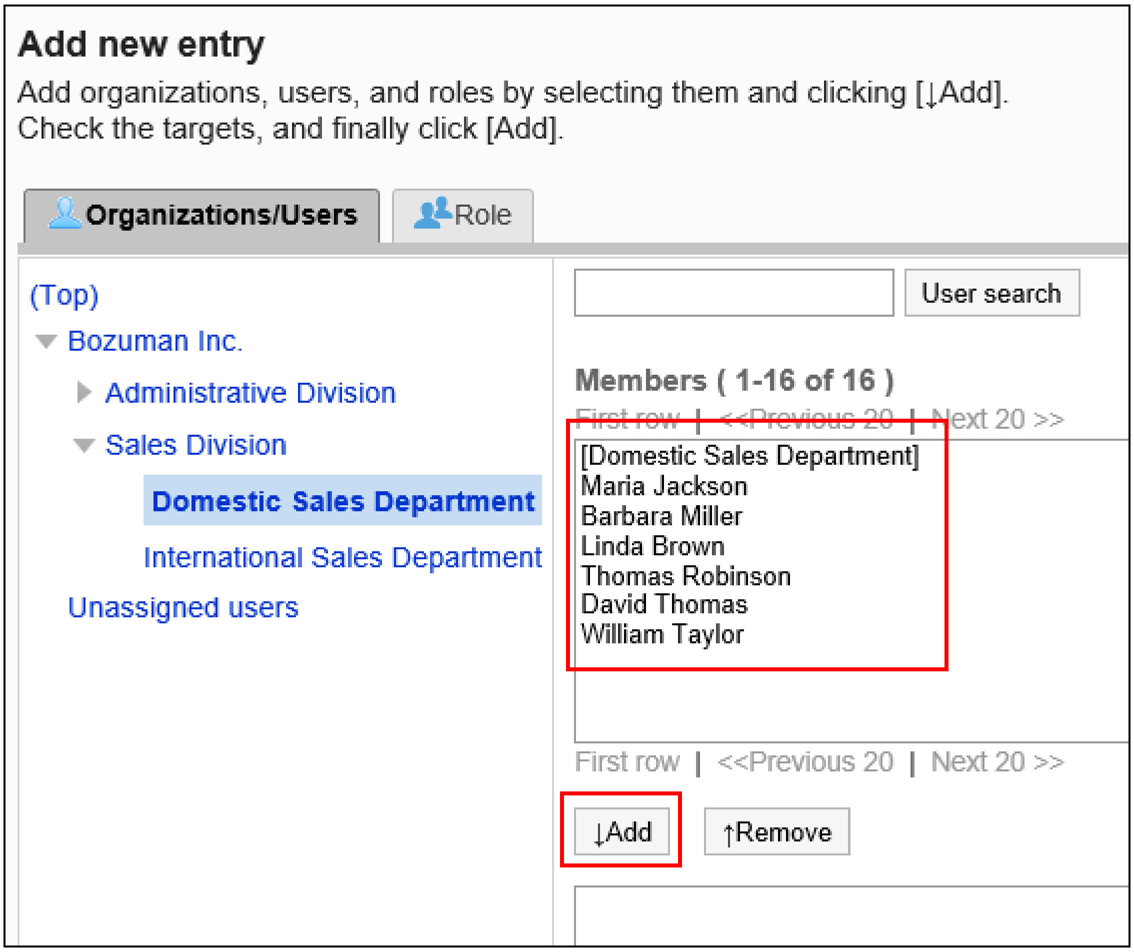
6. Check that the security model is "GRANT (Only users on list have access)".

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).

7. On the screen for permissions for My Portal, click "Add".



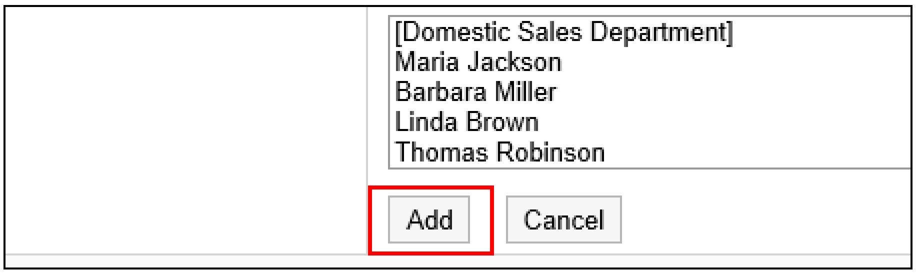
8. On the "Add Permissions" screen, select the department, user, or role to set permissions, and then click "Add".



To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

9. Click "Add".



Deleting Permissions for My Portals

Delete permissions granted users or departments to access My Portal.

If you delete permissions, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the permissions or users who belonged to the departments or roles that lost permissions no longer be able to work with items they previously could.

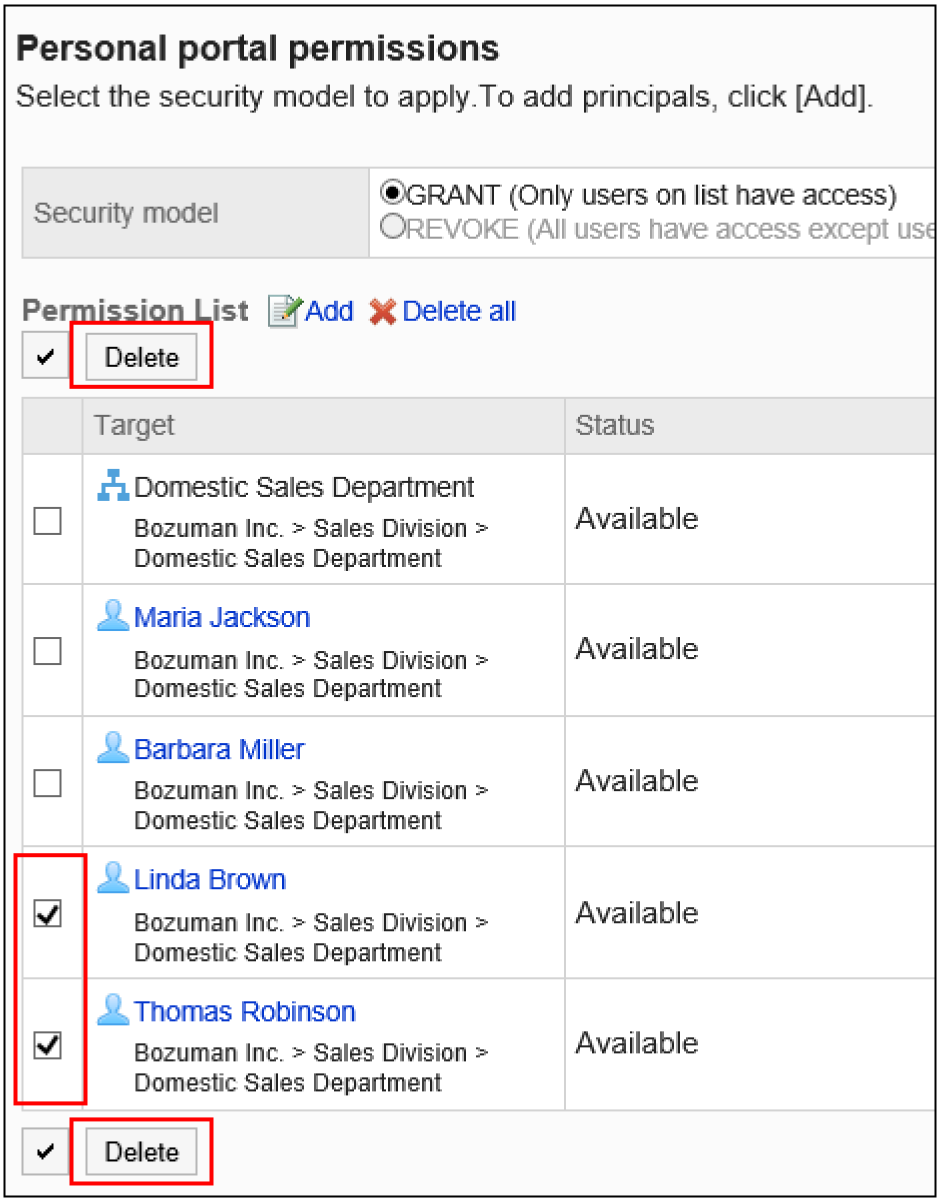
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the permissions or users who belonged to the departments or roles that lost permissions can now work with items they prohibited to use.

Selecting Permissions to Delete for My Portal

You can select permissions and delete them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click the item for permissions for My Portal.**
6. **On the screen to set permissions for My Portals, select the check boxes of the departments, users, or roles to delete permissions, and then click "Delete".**



7. Click "Yes" on the "Delete all Permissions" screen.

Deleting All Permissions for My Portal

You can delete all permissions.

Steps:

1. Click the administration menu icon (gear icon) in the header.

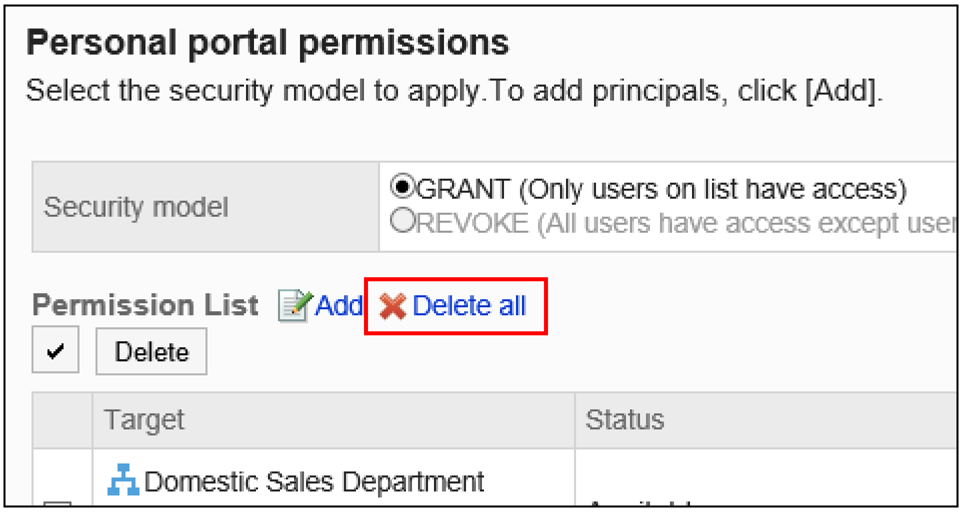
2. Click "System settings".

3. Select "Application settings" tab.

4. Click Portal.

5. Click the item for permissions for My Portal.

6. On the screen to set permissions for My Portals, click "Delete all".



7. Click "Yes" on the "Delete all Permissions" screen.

2.1.2. Managing HTML and PHP Portlets

In Garoon, you can use HTML and PHP to create your own portlets.
In addition, you can group HTML portlets or PHP portlets by usage to make them quickly be selected when you create portals.

References

- Configuring HTML Portlets(692Page)
- Configuring PHP Portlets(700Page)
- Setting up Portlet Groups(707Page)

- Setting up Operational Administrative Privileges for Portlet Groups(711Page)

2.1.2.1. Configuring HTML Portlets

HTML Portlets are portlets that you can create using HTML tags.
You can write tags in HTML portlets to show systems or WEB sites outside of Garoon.

Notes on HTML Tags

To ensure that the HTML portlet works correctly, be noted the following when you write tags:

Using Lowercases

HTML tags are written in lowercases.

Use End Tags

You should write start tags and end tags in pairs. If you place a portlet that does not have proper HTML tag pairs in a portal, it can cause problems such as a portal editing page incorrectly appears or a portal that can not be moved.
You also should note that not to cross nested tag pairs when you write HTML tags.

Example:

```
<table class=" top_title" >
 <tr>
  <td>
   <strong>
    kintone notifications
   </strong>
  </td>
 </tr>
</table>
```

Tags That Can Be Omitted

You do not need to describe html, head, or body tags in HTML portlets.

Secure Coding Guidelines

When you write scripts in JavaScript, read the following sections carefully in the Secure Cording Guidelines:

Avoid Using Cross-Site Scripting

Avoid Using Cross-Site Request Forgery

Adding HTML Portlets

Create HTML portlets. If the system administrator grants the users permissions to use portlets in My Portals, users can use them in their My Portals.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "HTML portlet".**
6. **On "HTML portlet" screen, click the item to add an HTML portlet.**

7. **On the screen to add HTML portlets, enter the "Portlet" field.**

You should set the default portlet name.

Clicking "Add localized name" allows you to set portlet names in multiple languages.

If you do not set the portlet name in the user preference language, the default portlet name is displayed.

The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese

  Displayed in Traditional Chinese.

8. Set the "Groups" field.

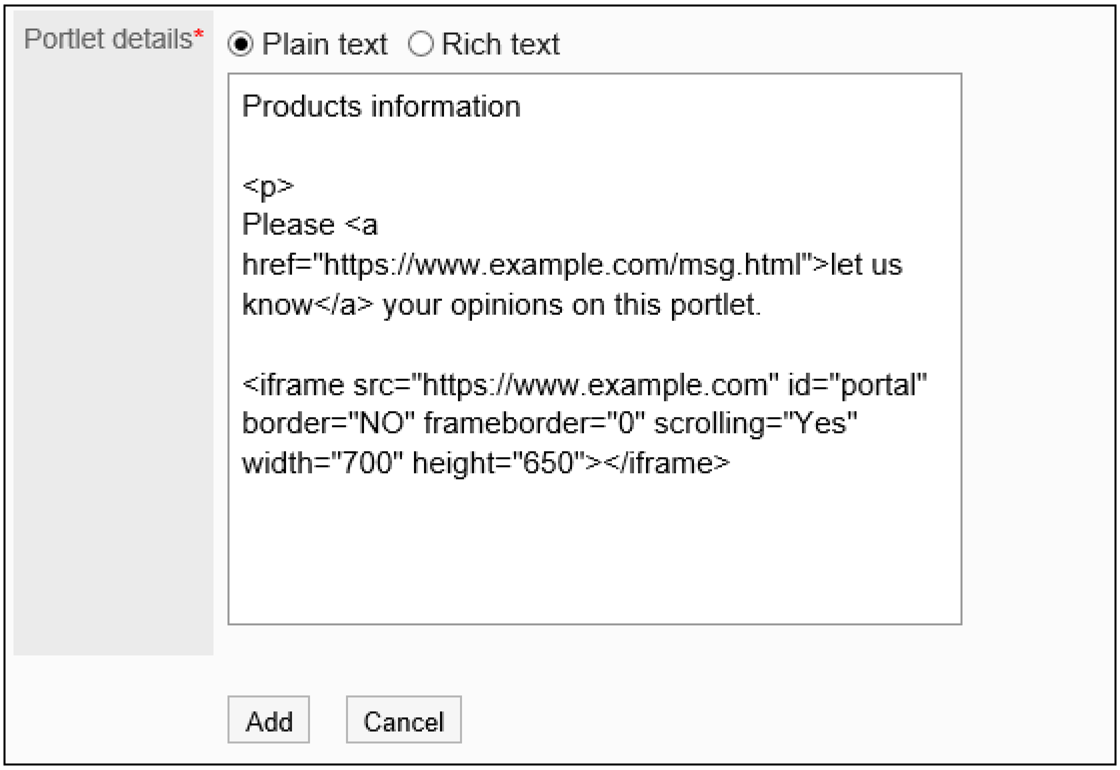
Select the portlet group to include the portlet.

9. Set the "My Portal" field.

To allow users to use the added HTML portlets in their My Portals, select the "Allowed" check box for My Portal.

10. Set the contents of the portlet field.

Use HTML tags and formatting to write the contents of the portlet.



You can customize the HTML portlets using the following functions:

- Keywords description:

  You can show information of users who use portlets by creating Usable Keywords(695Page).

11. Confirm your settings and click "Add".

Available Keywords

By using keywords, you can display user information of users who use portlets in HTML portlets.

The keyword replaces the user information of users who use the portlet.

Usable Keywords are as follows:

Keyword	Meaning
%Name%	User name
%ID%	User ID used in Garoon system
%Account%	Login name
%Mail%	E-mail added to the user information
%Password%	password

Keyword	Meaning
%session_password%	Password used by the logged-in user and stored in the session
%Tel%	Contact information added in the user information
%URL%	URL added in the user information

Note

- Using some symbols in your password may cause problems such as HTML portlet errors or improperly work key words.
  For details, see the password restrictions(102Page).
- If custom items are added to user information, you can use the following format to add them in HTML portlets:
  - Format: %grn.common.login.login.extension.item code of user information%
  - Example: %grn.common.login.login.extension.item_01%

Changing HTML Portlets

Change HTML portlets.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "HTML portlet".**
6. **On "HTML portlet" screen, select the portlet name of the HTML portlet to change.**
7. **On the screen for HTML portlet details, click "Save".**

8. **On the screen to edit HTML portlets, change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Customizing HTML Portlets Using JavaScript/CSS

You can customize the appearance of HTML portlet screens using JavaScript files and CSS files.

For details, refer to Portal Customization(592Page).

Checking the Appearance of HTML Portlets

Before making the HTML portlets public, you can preview the appearance of the portlets on user screens.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

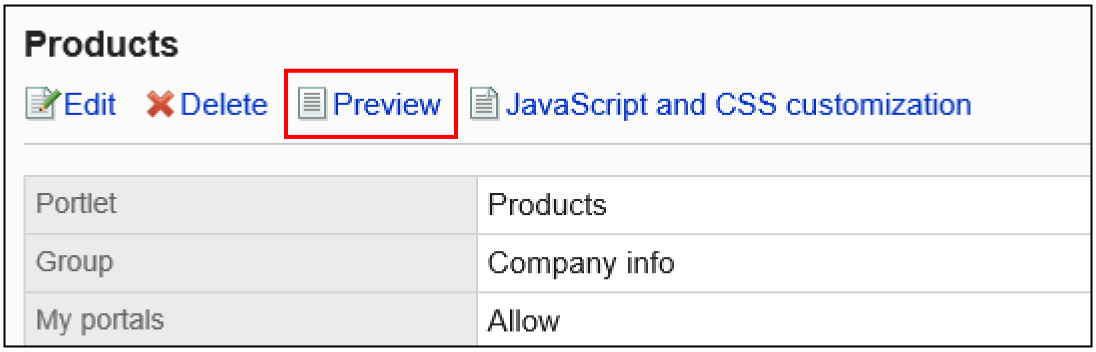
3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click "HTML portlet".**

6. **On the "HTML portlet" screen, select the HTML portlet to show the preview.**

7. **On the screen for HTML portlet details, click the item to check the appearance.**



Deleting HTML Portlets

Delete HTML portlets.

Caution

- Once you delete HTML portlets, they cannot be restored.
  If the HTML portlets are used in portals or My Portals, ensure that they won't cause errors before you delete them.

Deleting HTML Portlets One by One

Delete each HTML portlet.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "HTML portlet".**
6. **On the "HTML portlet" screen, select the portlet name of the HTML portlet to delete.**
7. **On the screen for HTML portlet details, click "Delete".**

8. **Click "Yes" on the deleting HTML portlet screen.**

Deleting Multiple HTML Portlets in Bulk

Delete multiple HTML portlets at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

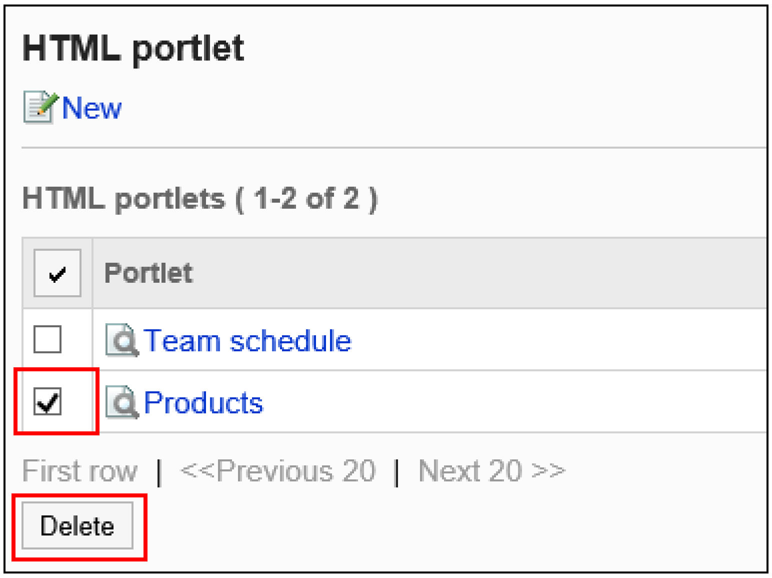
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click "HTML portlet".**

6. **On the "HTML portlet" screen, select the check boxes of the portlets to delete, and then click "Delete".**



7. Click "Yes" on the deleting all HTML portlets screen.

2.1.2.2. Configuring PHP Portlets

PHP portlets are portlets that can show dynamic contents by writing PHP scripts. They are used to show contents whose value varies, such as survey responses and one-time passwords.
PHP portlets can use user names, passwords, e-mail addresses, and other information as parameters.

Caution

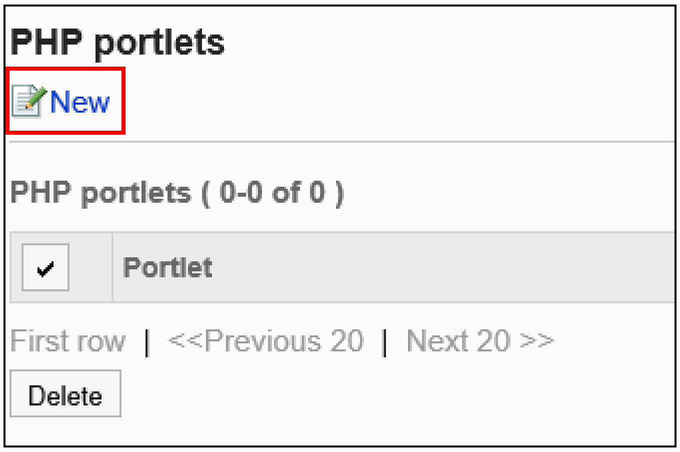
- Using older version of PHP for PHP portlets may cause errors.
  PHP versions that you can use for POP portlets differ depending on the Garoon versions.
  - Garoon versions before 3.1.0: PHP4
  - Garoon versions 3.1.0 or later: PHP5
- If you upgrade Garoon from versions earlier than 3.5 to the latest, PHP Portlets made before are set to private.
  To use the same PHP portlets on an upgraded Garoon instance, ensure that there are no errors before you make the portlets public.

Adding PHP Portlets

Add PHP portlets. Only Garoon administrators can create PHP portlets.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Portal".**
5. **Click a PHP portlet.**
6. **On the screen for PHP portlets, click the item to add PHP portlet.**



7. **On the screen to add PHP portlets, enter the Portlet name.**

   You should set the default portlet name.

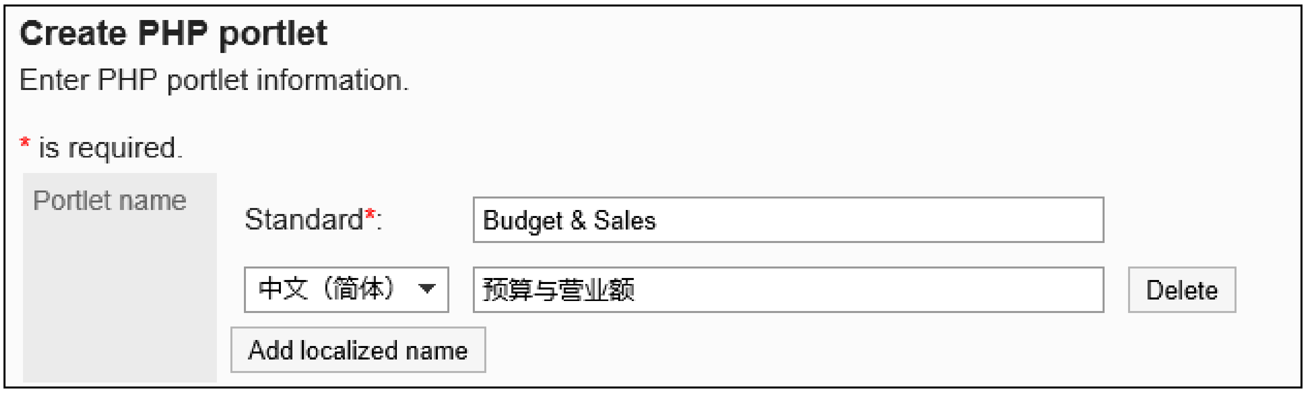
   Clicking "Add localized name" allows you to set portlet names in multiple languages.

   If you do not set the portlet name in the user preference language, the default portlet name is displayed.

   The following languages can be set:

   - 日本語
   - English
   - Simplified Chinese
   - Traditional Chinese

     Displayed in Traditional Chinese.



8. **Set the "Groups" field.**

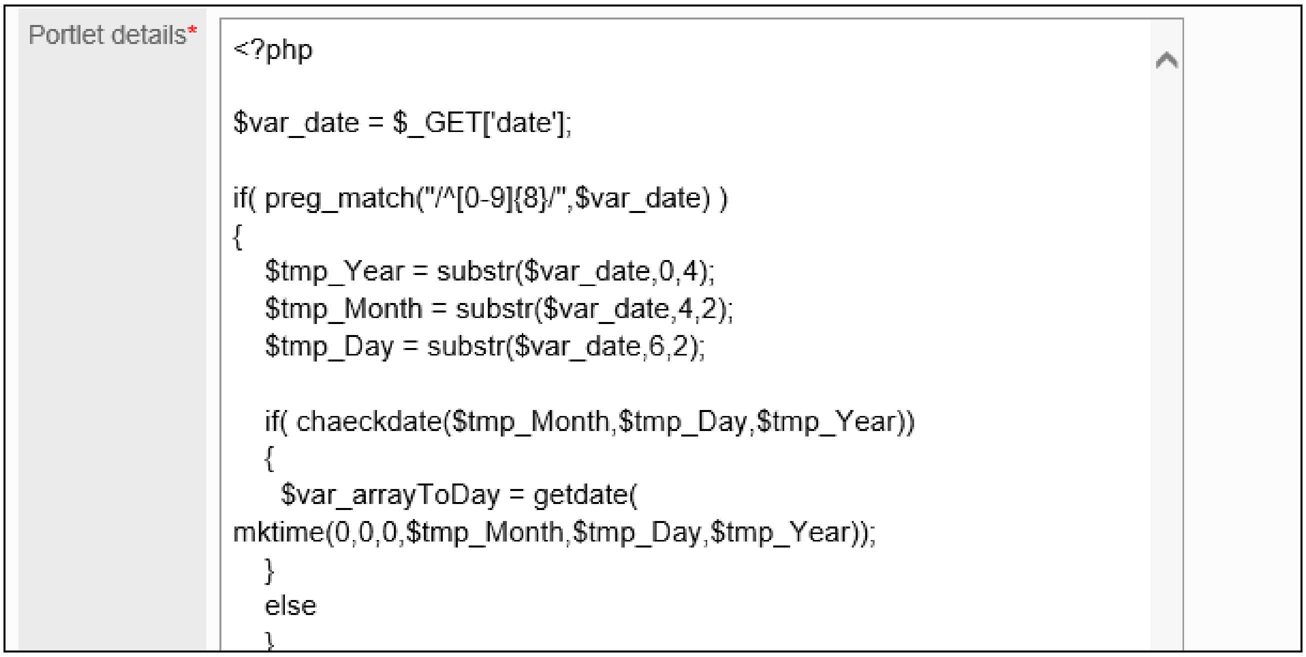
Select the portlet group to include the portlet.

9. **Set the "My Portal" field.**

To allow users to use the added PHP portlets in their My Portals, select the "Allowed" check box for My Portal.

10. **Set the contents of the portlet field.**

Use PHP codes to describe the contents of the portlet.



You can customize the PHP portlets using the following functions:

- Keywords description:
  You can show information of users who use portlets by creating Usable Keywords(703Page).

11. Confirm your settings and click "Add".

Available Keywords

By using keywords, you can display user information of users who use portlets in PHP portlets.
The keyword replaces the user information of users who use the portlet.
Usable Keywords are as follows:

Keyword	Meaning
%Name%	User name
%ID%	User ID used in Garoon system
%Account%	Login name
%Mail%	E-mail added to the user information
%Password%	password
%session_password%	Password used by the logged-in user and stored in the session
%Tel%	Contact information added in the user information
%URL%	URL added in the user information

Note

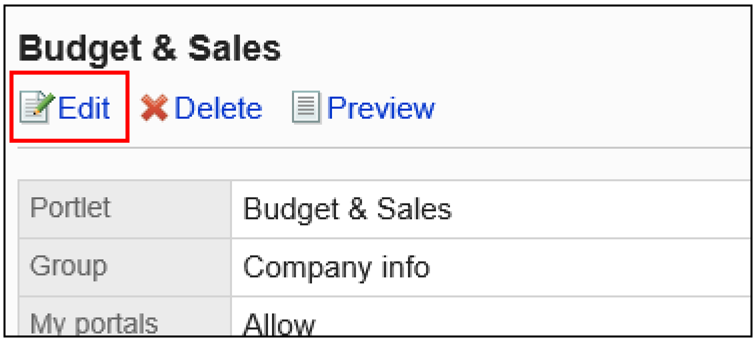
- Using some symbols in your password may cause problems such as PHP portlet errors or improperly work key words.
  For details, see the password restrictions(102Page).
- You can add custom items to PHP portlets using the following format:
  - Format: %grn.common.login.login.extension.item code of custom item%
  - Example: %grn.common.login.login.extension.item_01%

Changing PHP Portlets

Change PHP portlets.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Portal".**
5. **Click a PHP portlet.**
6. **On the screen for PHP portlets, click the portlet name of the PHP portlet to change.**
7. **On the PHP portlet details screen, click "Save".**



8. **On the screen to edit PHP portlets, change the settings as necessary.**
9. **Confirm your settings and click "Save".**

Checking the Appearance of PHP Portlets

Before making the PHP portlets public, you can preview the appearance of the portlets on user screens.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

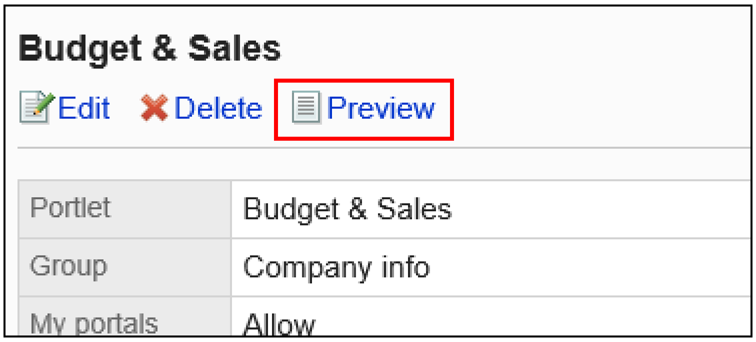
3. Select "Application settings" tab.

4. Click "Portal".

5. Click a PHP portlet.

6. On the screen for PHP portlets, click the portlet name of the PHP portlet to preview.

7. On the PHP portlet details screen, click "Checking PHP Portlets".



Deleting PHP Portlets

Delete PHP portlets.

Caution

- After deleting PHP portals, they cannot be restored.
  If the PHP portlets are used in portals or My Portals, ensure that they won't cause errors before you delete them.

Deleting PHP Portlets One by One

Delete each PHP portlet.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

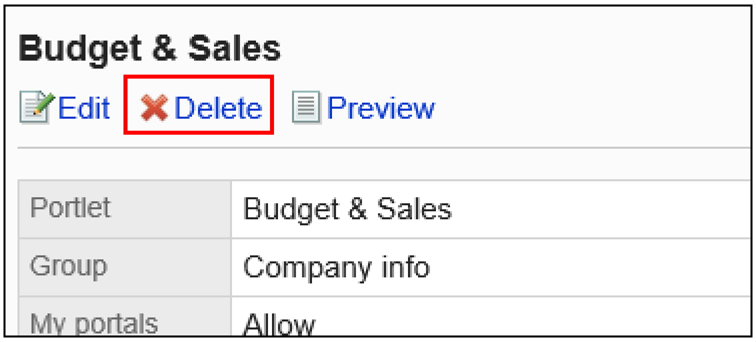
3. Select "Application settings" tab.

4. Click "Portal".

5. Click a PHP portlet.

6. On the screen for PHP portlets, click the portlet name of the PHP portlet to delete.

7. On the PHP portlet details screen, click "Delete".



8. Click "Yes" on the screen to delete all PHP portlets.

Deleting Multiple PHP Portlets in Bulk

Delete multiple PHP portlets in bulk.

Steps:

1. Click the administration menu icon (gear icon) in the header.

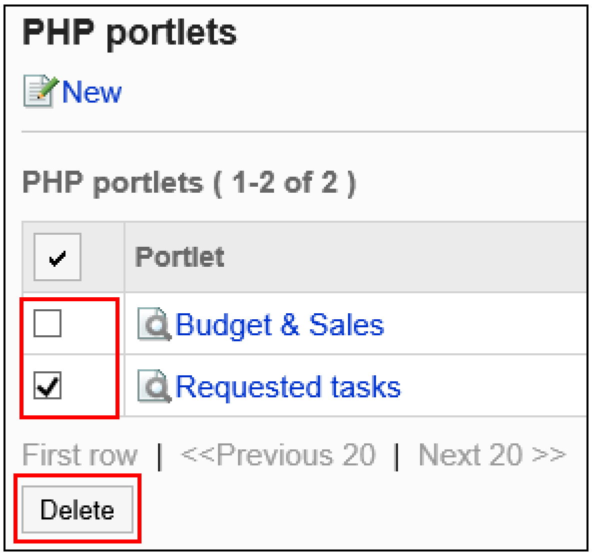
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Portal".

5. Click a PHP portlet.

6. On the screen for PHP portlets, select the check box for the portlets to delete, and then click "Delete".



7. Click "Yes" on the screen to delete all PHP portlets.

2.1.2.3. Setting up Portlet Groups

You can combine HTML portlets or PHP portlets as a portlet group.
By creating portlet groups, you can group HTML portlets or PHP portlets by usage, enabling you to quickly select a group of portlets when you create a portal.
When you create portlet groups and add portlets to them, you can do so from the details screen of HTML portlets or PHP portlets.
For details, see the following page:
[Configuring HTML Portlets(692Page)]
[Configuring PHP Portlets(700Page)]

Adding Portlet Groups

Create a portlet group to group HTML portlets or PHP portlets.

Steps:

1. Click the administration menu icon (gear icon) in the header.

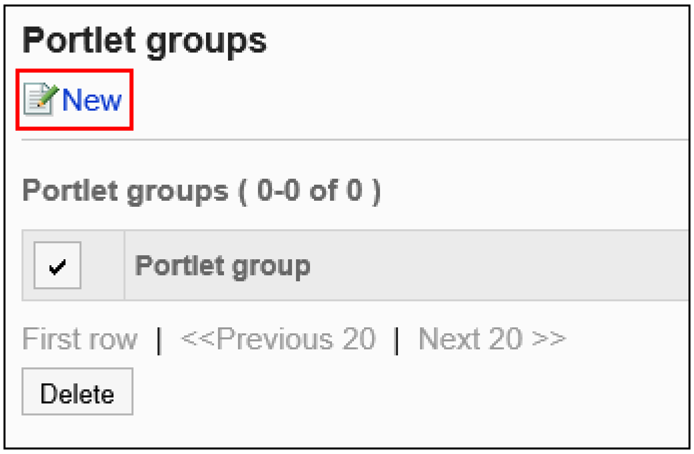
2. Click "System settings".

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click Portlet Group.**

6. **On the screen for portlet groups, click an item to add a portlet group.**



7. **On the screen to add portlet groups, enter the name of the group.**

You should set the default group name.

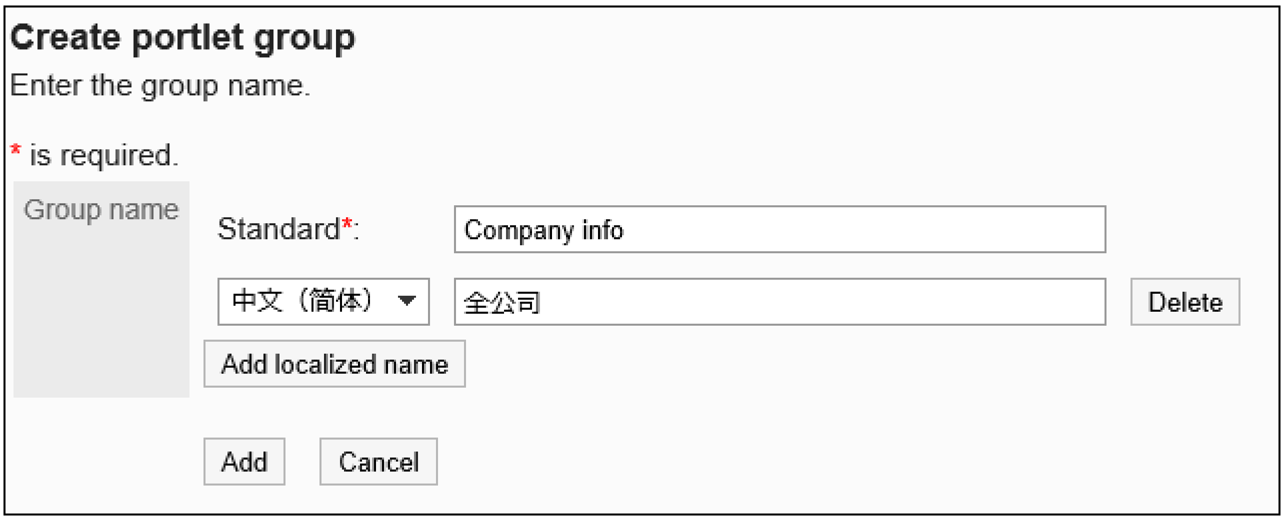
Clicking "Add localized name" allows you to set group names in multiple languages.

If you do not set the group name in the user preference language, the default group name is displayed.

The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese

  Displayed in Traditional Chinese.



8. Confirm your settings and click "Add".

Changing Portlet Groups

Change group names.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

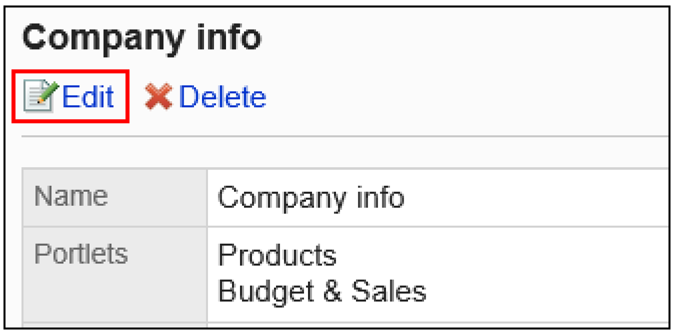
3. Select "Application settings" tab.

4. Click Portal.

5. Click Portlet Group.

6. On the screen for portlet groups, click the portlet group name of the portlet group.

7. On the screen for portlet group details, click "Save".



8. On the screen to change portlet groups, change the group name, then click "Save".

Deleting Portlet Groups

Delete portlet groups.

When you delete portlet groups, the memberships of HTML portlets or PHP portlets belonging to the group are cleared. The portlets themselves are not deleted.

Caution

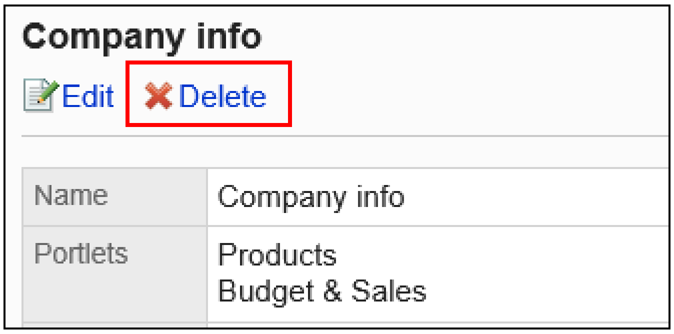
- Once you delete portlet groups, they cannot be restored.

Deleting Portlet Groups One by One

Delete each portlet group one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click Portlet Group.**
6. **On the screen for portlet groups, click the portlet group name of the portlet group to delete.**
7. **On the screen for portlet group details, click "Delete".**



8. **On the screen to delete portlet groups, click "Yes".**

Deleting Multiple Portlet Groups in Bulk

Delete multiple portlet groups.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

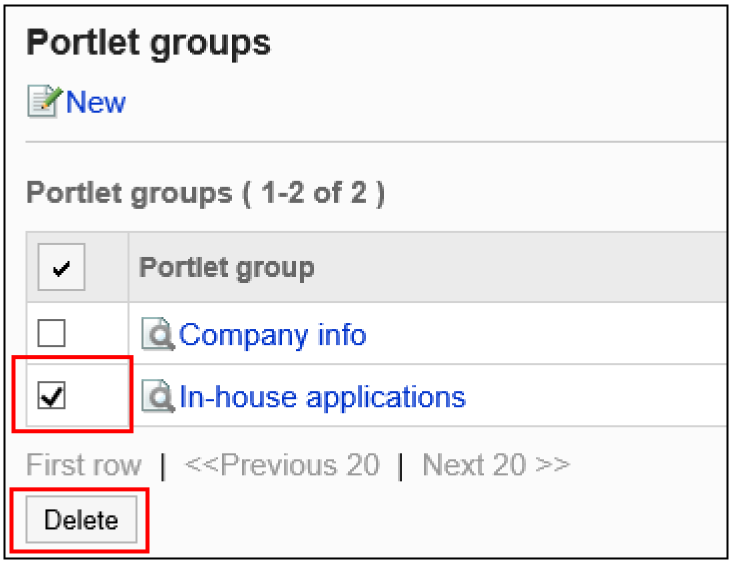
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click Portlet Group.**

6. **On the screen for portlet groups, select the check box for the portlet group to delete, and then click "Delete".**



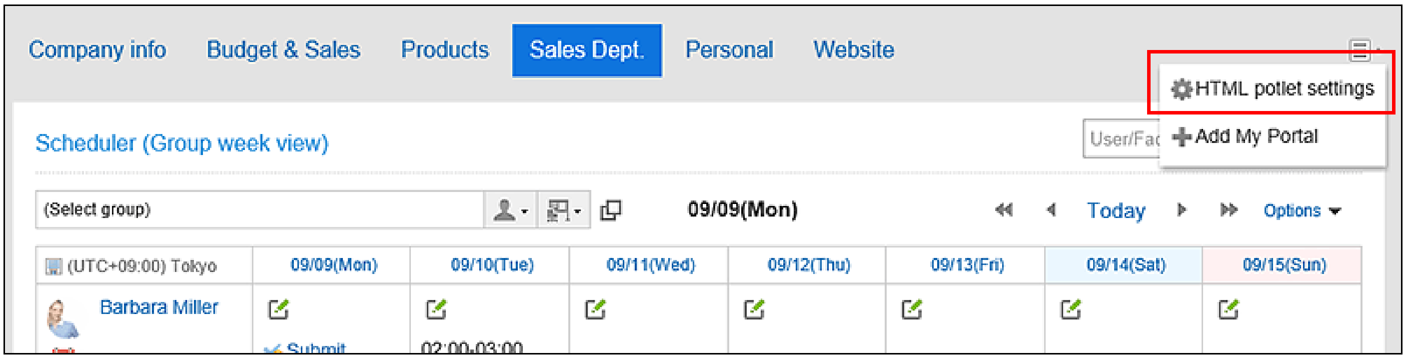
7. **Click "Yes" on the screen to delete portlet groups.**

2.1.2.4. Setting up Operational Administrative Privileges for Portlet Groups

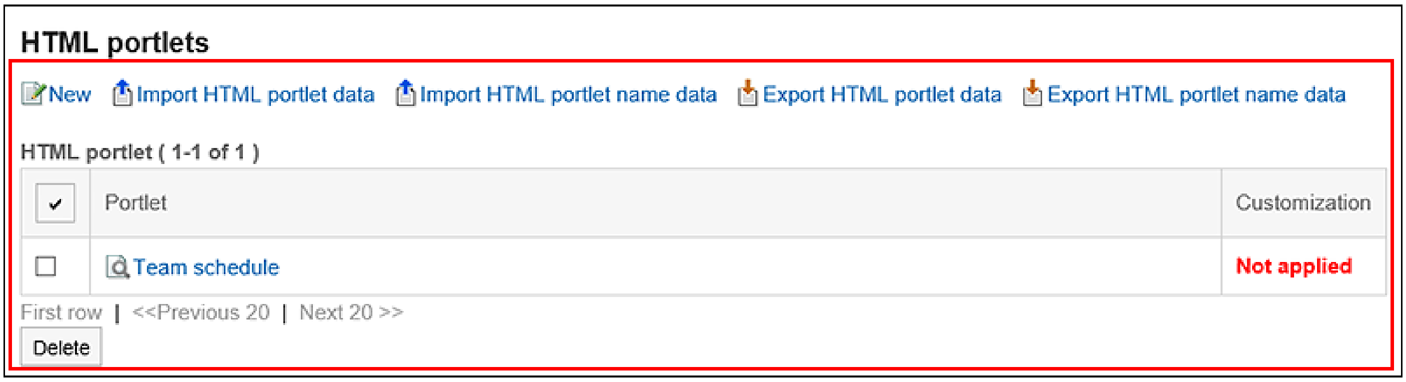
Set an operational administrator for each portlet group.

Operational administrators are administrators who are granted operational administrative privileges to manage HTML portlets in the portlet group by the system administrator.

If you are assigned as an operational administrator, clicking the icon on "Portal" screen displays the HTML portlet settings and you can manage the HTML portlets on the user screen.



When you click the item to set HTML portlets, the "HTML portlet" screen appears.



Operational administrators can do the following tasks:

- Add HTML portlets:
  For details, refer to Adding HTML Portlets(693Page).
- Change HTML portlets:
  For details, refer to Changing HTML Portlets(696Page).
- Delete HTML portlets:
  For details on the procedure, refer to Deleting HTML Portlets(698Page).
- Check the appearance of HTML portlets:
  For details on the procedure, refer to Checking the Appearance of HTML Portlets(697Page).
- JavaScript and CSS Customization
  For details, refer to Portal Customization(592Page).
- Managing HTML Portlet Data Using XML Files
  - Importing HTML Portlets
  - Exporting HTML Portlets

  For details, refer to Managing Portlet Data Using XML Files(717Page).
- Managing HTML Portlet Names Using CSV Files
  - Importing HTML Portlet Names
  - Exporting HTML Portlet Names

  For details, refer to Managing Portlet Names Using CSV Files(719Page).

Setting Operational Administrative Privileges

Set operational administrative privileges for each portlet group.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

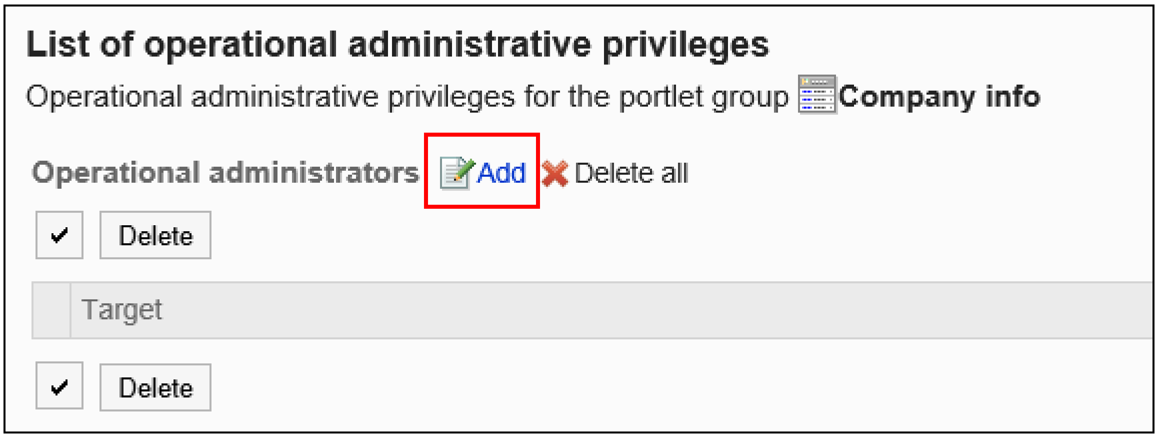
3. Select "Application settings" tab.

4. Click Portal.

5. Click "Operational administrative privileges for portlet groups".

6. On the operational administrative privileges screen of the portlet group, select the portlet group.

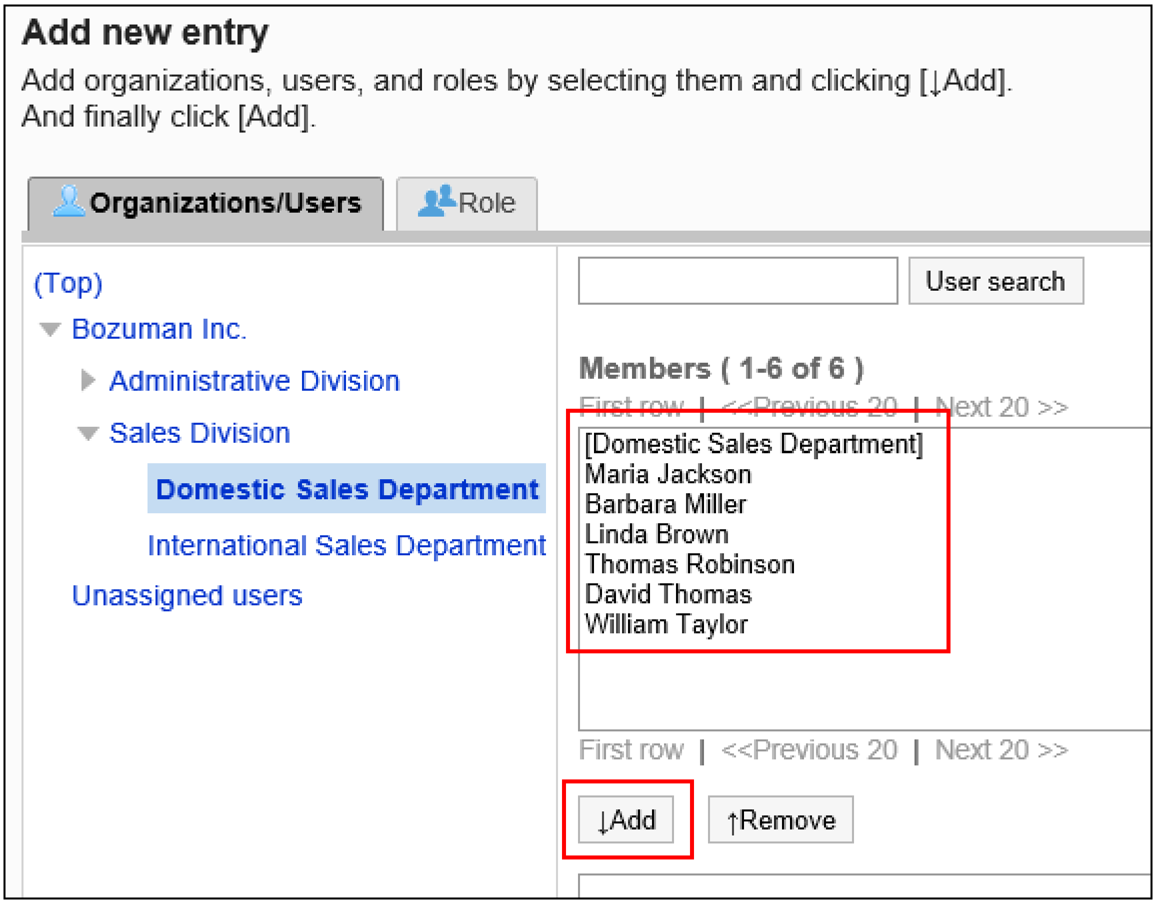
7. On the screen for operational administrative privilege list, click "Add".



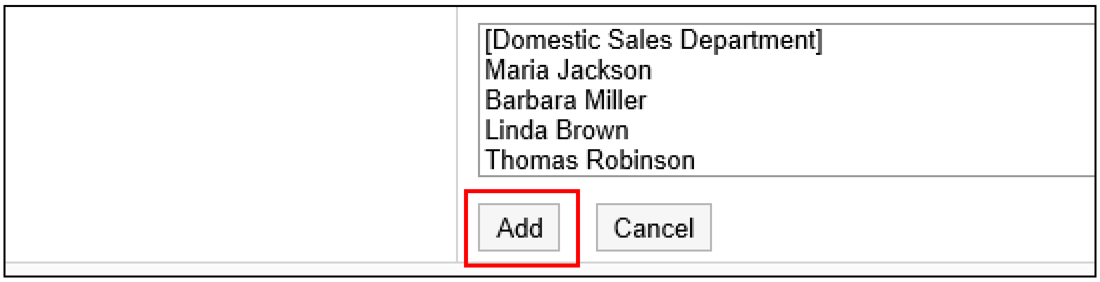
8. On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. Click "Add".



Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

Caution

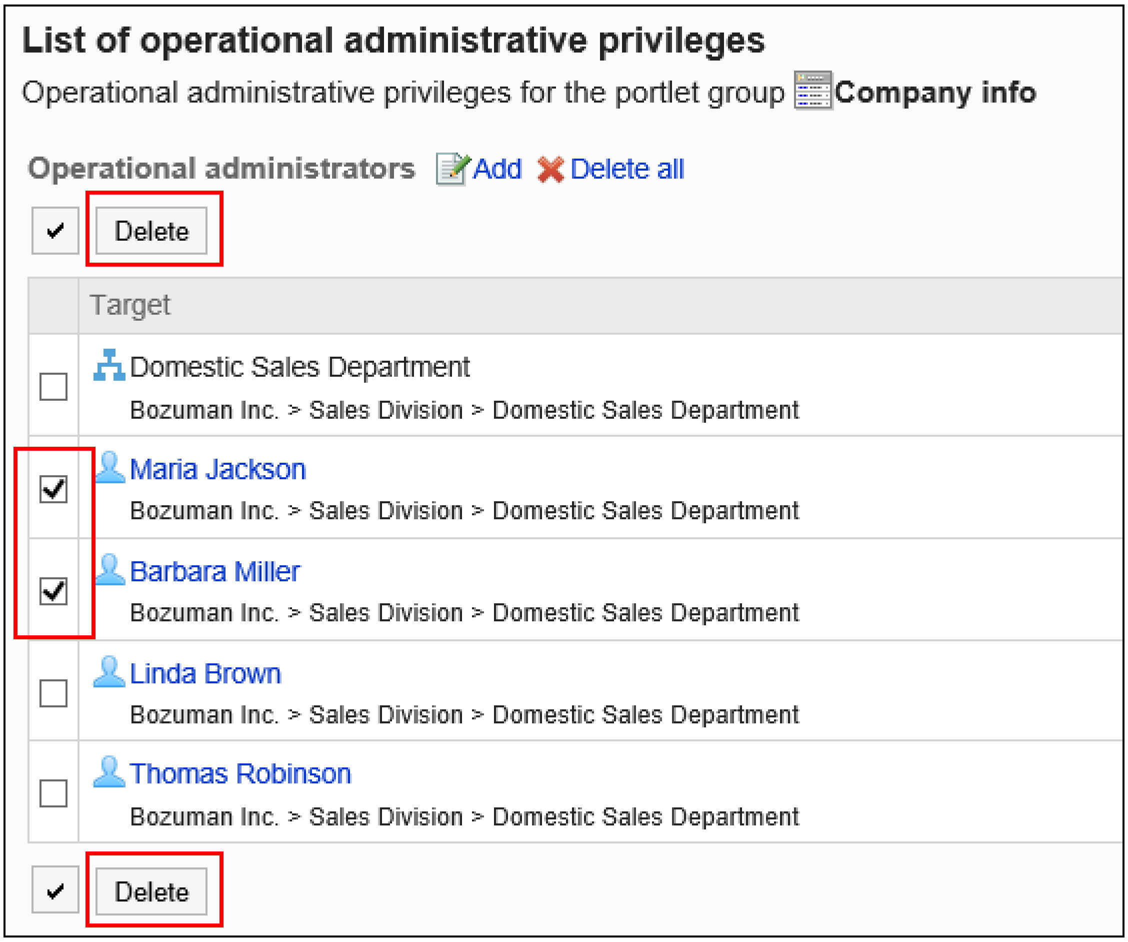
- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Portal.**
5. **Click "Operational administrative privileges for portlet groups".**
6. **On the operational administrative privileges screen of the portlet group, select the portlet group.**
7. **On the screen for operational administrative privilege list, select the check boxes of the operational administrative privileges to delete, then click "Delete".**



8. Click "Yes" on the screen to delete all operational administrative privileges.

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

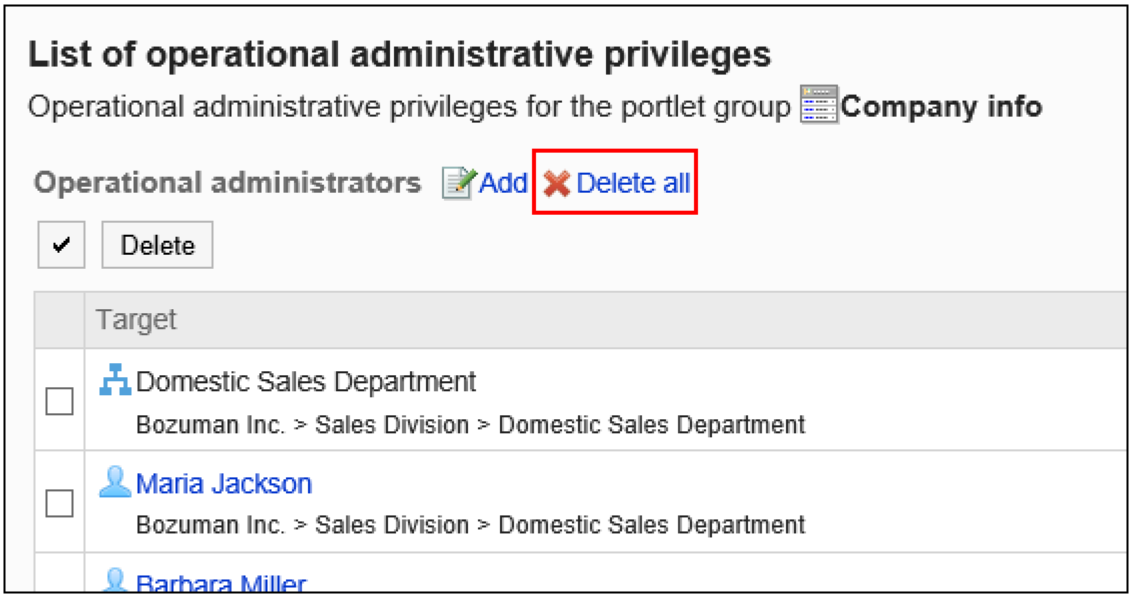
3. Select "Application settings" tab.

4. Click Portal.

5. Click "Operational administrative privileges for portals".

6. On the screen for operational administrative privileges for portals, select portals.

7. **On the screen for "List of operational administrative privilege", click Delete all.**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.1.2.5. Managing Portlet Data Using Files

Manage portlet data using files.

The following data can be managed using files:

- XML file:
  - HTML portlet data
  - PHP portlet data
- CSV file:
  - HTML Portlet Name
  - PHP portlet name

Managing Portlet Data Using XML Files

Import portlet data from XML files.

Import Data from an XML file

Import data from XML files.

Steps:

1. **Create an XML file to import data.**

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

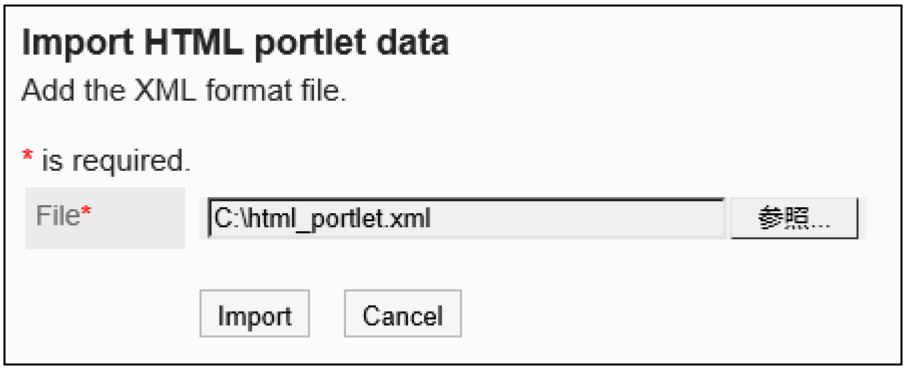
4. **Select "Application settings" tab.**

5. **Click Portal.**

6. **Click "Import from File".**

7. **On the screen to import from files, select the data to import.**

8. **Select the XML file that you created in step 1, and then click "Import".**



Exporting Data to an XML File

Export portlet data to an XML file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

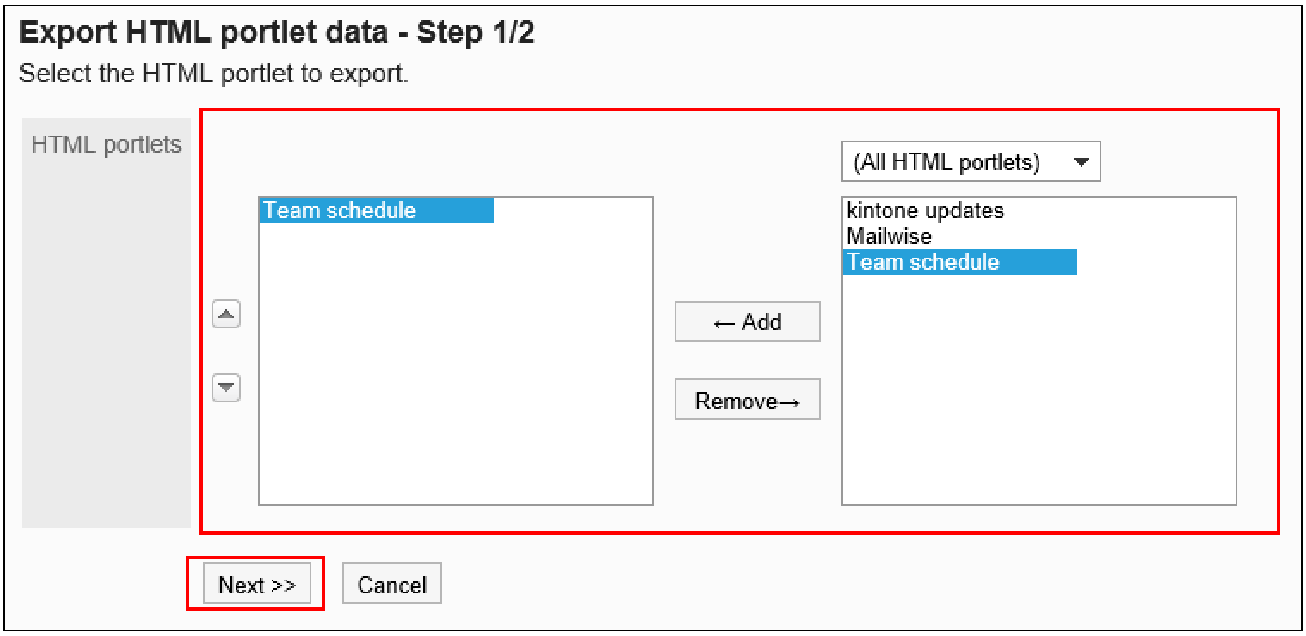
4. **Click Portal.**

5. **Click "Export to File".**

6. **On the screen to export data to a file, select the data to export.**

7. **On the screen to export portlets, select the portlet to export data, then click "Add" then click "Next".**

You can select multiple portlets.



8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

Managing Portlet Names Using XML Files

Manage portlet names in a CSV file.

Importing Data from a CSV File

Import portlet names from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in Portal(1825Page).

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click Portal.**

6. **Click "Import from File".**

7. **On the screen to import from files, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the data to import, and click "Next".**

   The setting fields are as follows:

   - Character encoding:

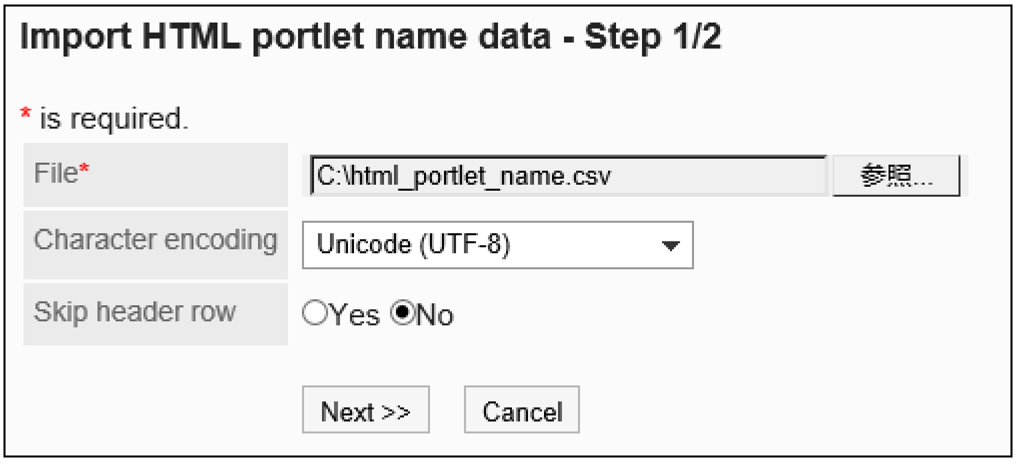
     Encodes data from a CSV file with the selected character code.

     The following characters can be selected:

     - Unicode (UTF-8)
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)

   - Skip the first row:

     If the header row contains information other than data such as an item name and a comment, select "Yes".



10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

Export portlet names to a CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click Portal.**

5. **Click "Export to File".**

6. **On the screen to export data to a file, select the data to export.**

7. **Set the required items for the the data to export.**

The setting fields are as follows:

- Character encoding:

  Select the character code that you want to use for encoding.

  The following character encoding can be selected:

  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)

- Simplified Chinese (GB2312)
- Thai (TIS-620)

- Include header row:
  To export item names to the header row of a CSV file, select "Yes".
- Language in which the data is exported:
  This field appears when you export HTML portlet names or PHP portlet names.
  Set the language to export the names of the HTML portlets or PHP portlets. You can set multiple languages.
  The following languages can be selected:
  - All
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese
    Exported in Traditional Chinese.

8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

2.1.3. Portlet Types and Settings

The portlet allows you to place Garoon applications as small content in the top page (portal).
The portlet includes a variety of items, such as scheduler and bulletin board. You can also create your own portlets in HTML and PHP.
This section describes portlet types and portlet settings.

References

- Flow for Creating Portals(634Page)
- Portlet Placement(646Page)
- How to View the Screen
- Portlet Placement in My portal

2.1.3.1. Portal Portlet

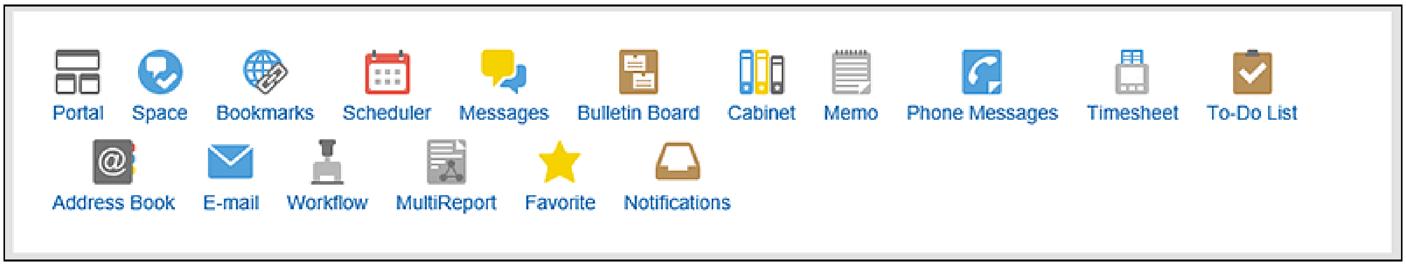
The following portlet types are available in the portal Portlet

- Application Menu portlet
- Notices portlet
- Calendars portlet
- Quick Send portlet

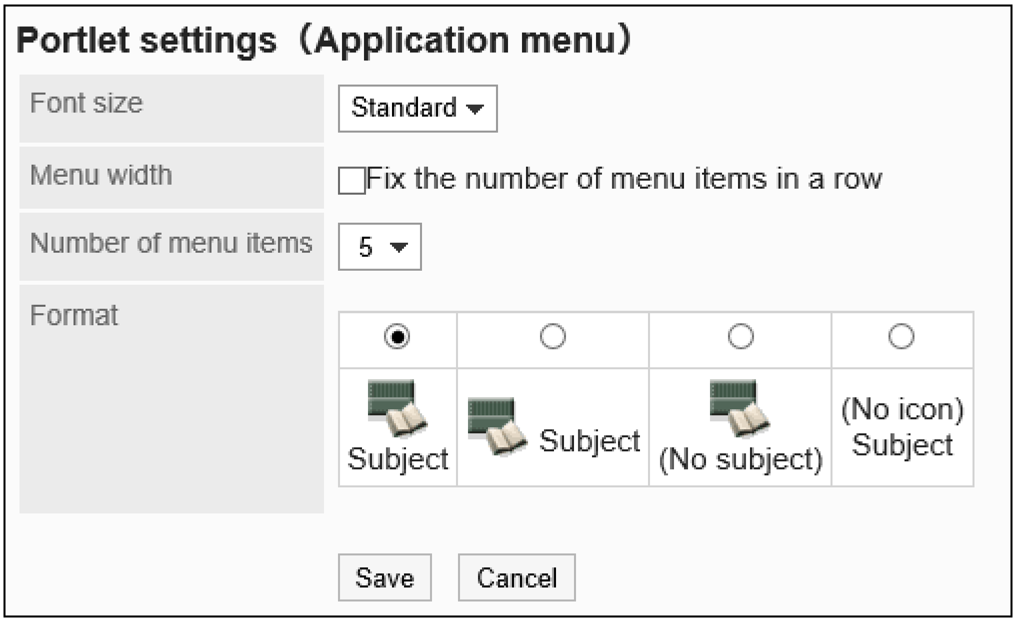
Application Menu Portlet

The icon of the available application, or the portlet for which you want to display links.

When you click an icon or a link, the screen of each application is displayed.



Setting Options for Portlets



- Character size

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Wrapping:

  Wraps the application menu with the specified number of "Number of wraps" field.

- Number of Wraps

  Wraps the application menu by the specified number.

  Selecting the "Wrap" check box is enabled.

  The number of selections can be from 5 to 20.

- Format:

  Select a format for the title and icon of the menu that is displayed in the Application menu.

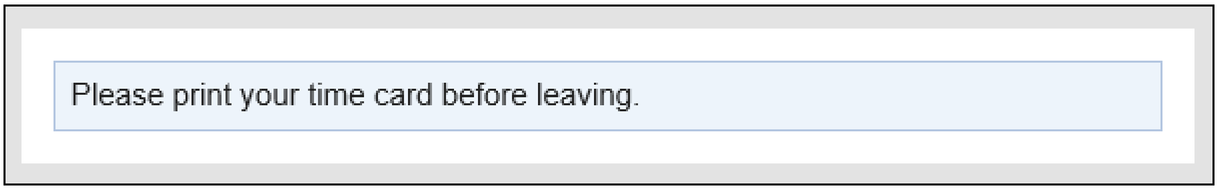
  The available formats are as follows

  - Show title under Icon
  - Show title next to Icon
  - Show only icon
  - Show only titles

Notices Portlet

A portlet displays arbitrary text in the portal.

You can display common announcements and messages in the company.



Setting Options for Portlets

- Contents:

  Enter the text that you want to appear in the portal.

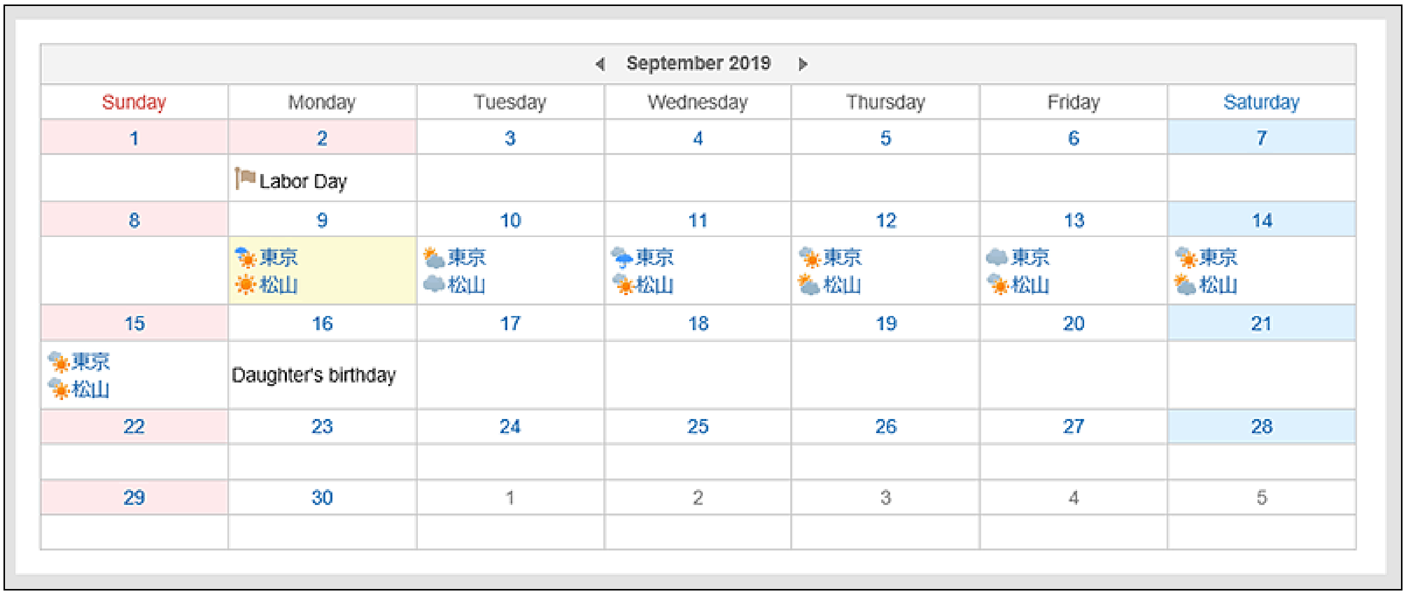
  You can use Rich Text Formatting.
- Frame/Background settings

  To set a border and a background in text, select the "Set" check box, and then select a color for the background.

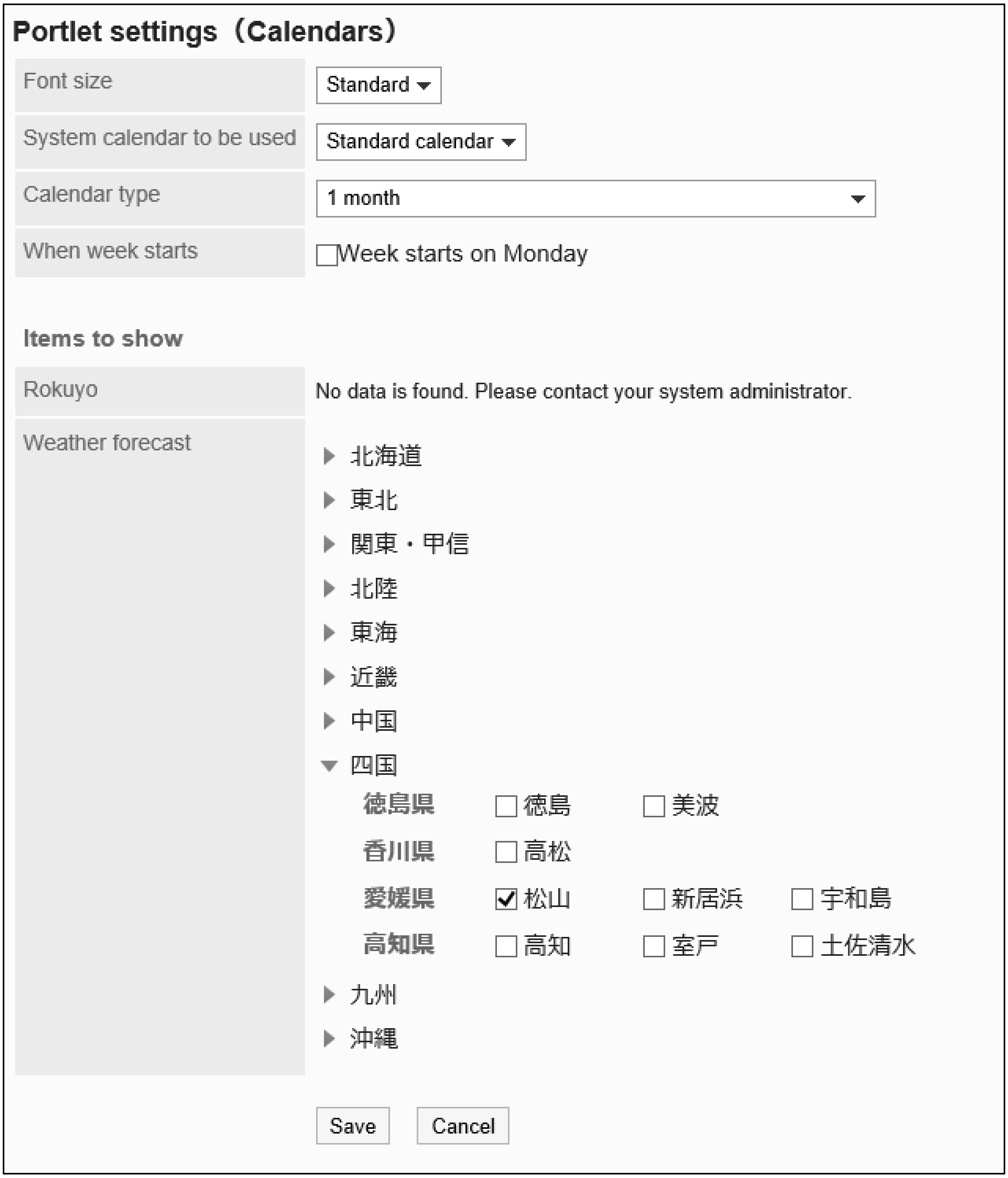
Calendars Portlet

A portlet displays a calendar.

Changing the Calendar view also toggles the display of the scheduler Portlet placed in the same portal.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- System calendar to be used

  For details, refer to Calendar(278Page).

- Calendar format:
  Set the format for which you want to display the calendar.
  The formats that can be displayed are as follows
  - 1 month
  - 2 months/next month
  - 2 months (previous month)
  - 3 months (previous month)
  - 3 months (month/Masuki)
  - 3 months (previous month/month)

- Start day of the week
  To start the week as a Monday, select the check box.
- Display items
  Select an item to display.
  - Roku:
    Select whether to show the six-you to the portlet.
    If the system administrator has not received the six-Monday event data, you cannot display the Roku.
  - Weather forecast:
    Set the region for which you want to view the weather forecast. Click the Regional icon that contains the region you want to view, and then select the check box for the region.

Quick Send portlet

This is the portlet for which you want to display outgoing links. You can create messages or e-mails from this portlet.

Setting Options for Portlets

This portlet has no "portlet settings".

2.1.3.2. Space Portlet

The following portlet types are available in the space portlet.

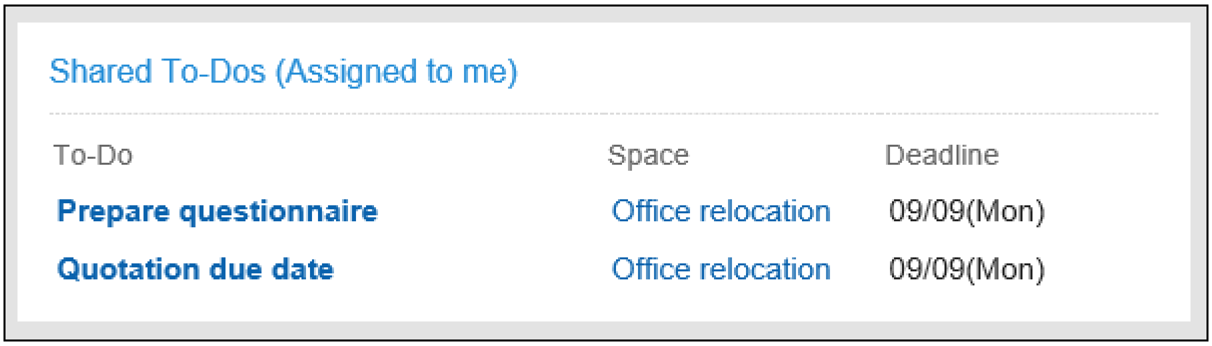
- Shared To-Dos (Assigned to me) Portlet

- Shared To-Dos (Created by me) Portlet

Shared To-Dos (Assigned to me) Portlet

The Shared To-Dos (Assigned to me) portlet displays the uncompleted To-Do tasks assigned to you. A maximum of 20 tasks are displayed.
To-Do names are displayed in the following colors according to their due dates:

- Bold red:
  To-do tasks past the due date
- Blue Bold:
  To-do tasks whose due dates are today
- 青字：
  To-do tasks before due dates and whose due dates are not set



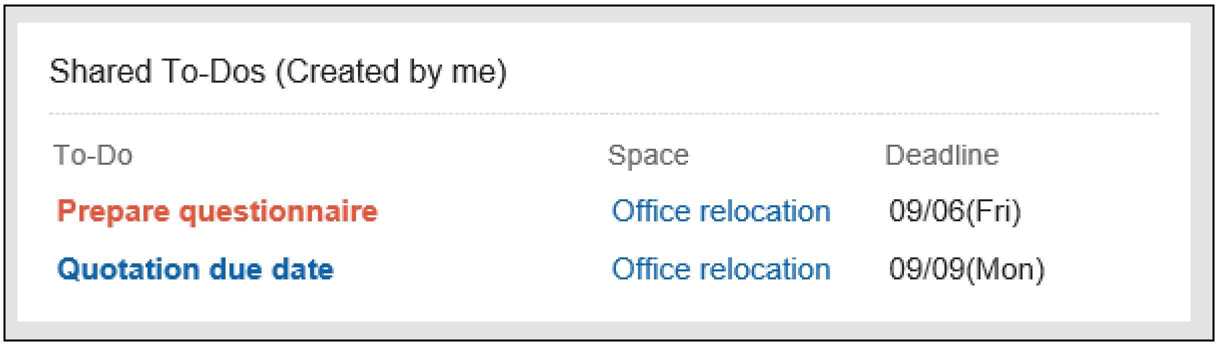
Setting Options for Portlets

This portlet has no "portlet settings".

Shared To-Dos (Created by me) Portlet

The Shared To-Dos (Created by me) portlet displays the To-Do tasks created by you. Completed To-Dos are also displayed. A maximum of 20 tasks are displayed.
To-Do names are displayed in the following colors according to their due dates:

- Bold red:
  To-do tasks past the due date
- Blue Bold:
  To-do tasks whose due dates are today
- 青字：
  To-do tasks before due dates and whose due dates are not set



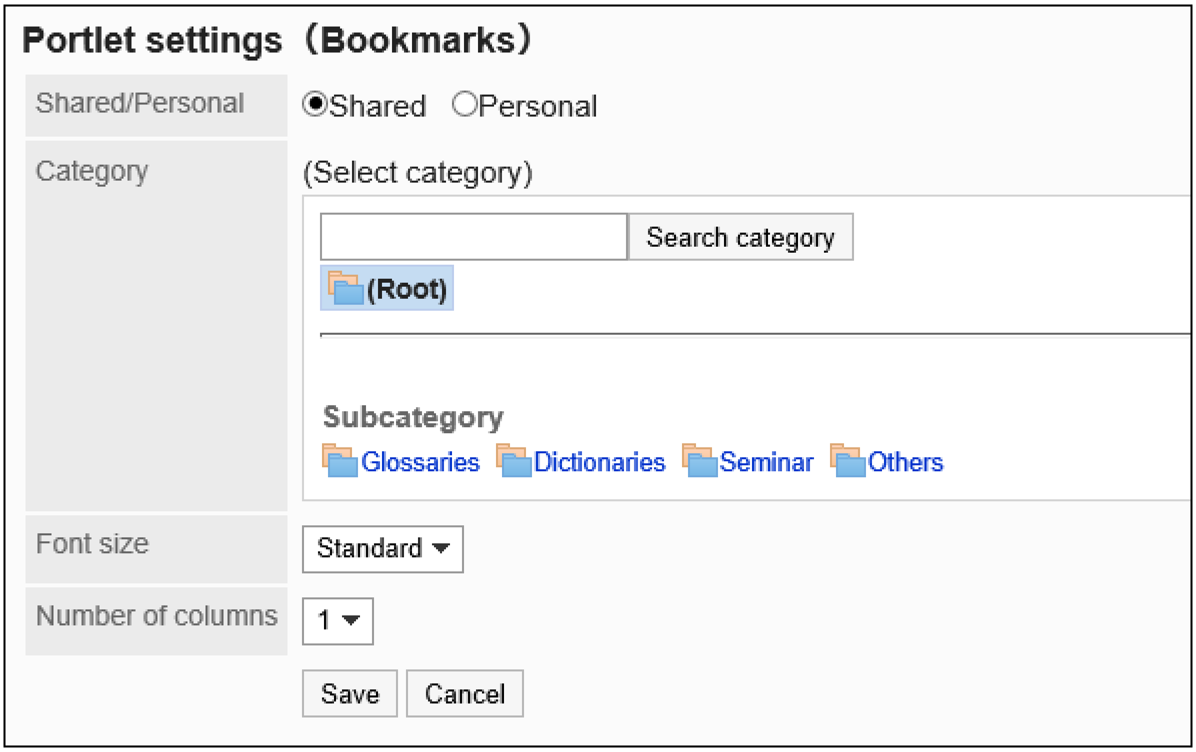
Setting Options for Portlets

This portlet has no "portlet settings".

2.1.3.3. Bookmarks Portlet

A portlet displays a collection of links.

Setting Options for Portlets



- Shared/Personal:

  Displays either a shared link or a collection of personal links.
- Category:

  Set the category you want to display.
- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:
  - Small
  - Standard
  - Large
- Number of columns

  Specify the number of columns in the array of links in the portlet.

  The number of columns can be set from 1 to 3 columns.

2.1.3.4. Scheduler Portlet

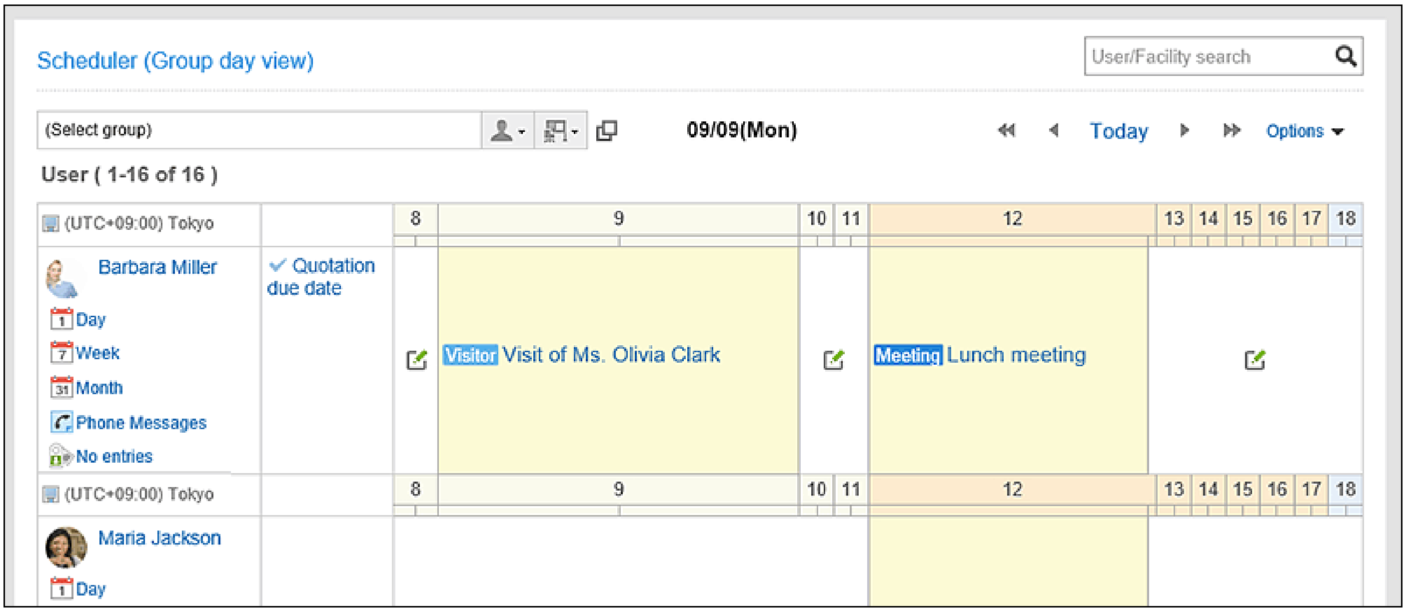
The following portlet types are available in the scheduler Portlet

- Scheduler (Day View) portlet
- Scheduler (Group Week View) portlet

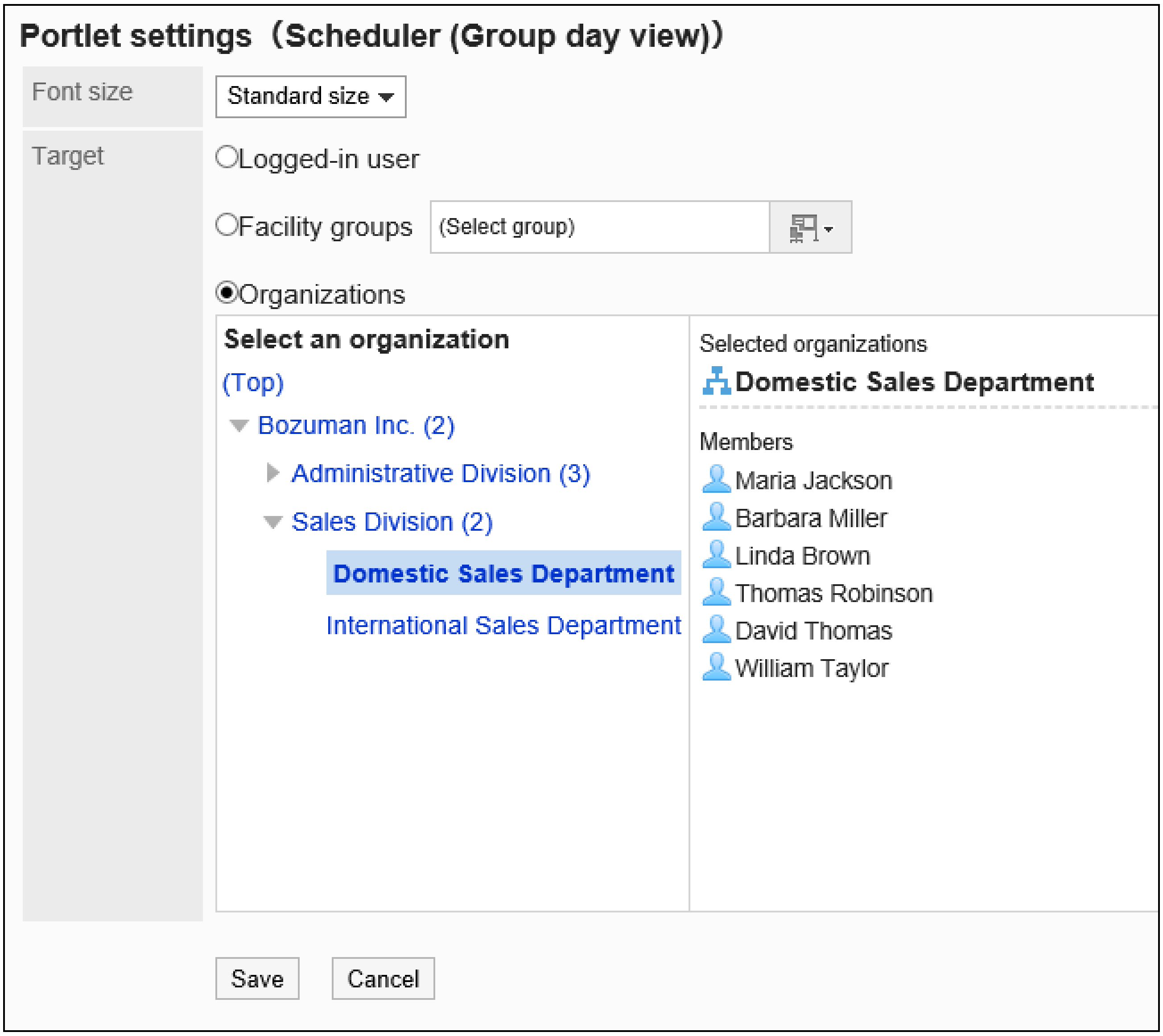
- Scheduler (Day View) portlet
- Scheduler (Week View) portlet
- Scheduler (Month View) portlet
- Scheduler (Year View) portlet
- Schedule Search Portlets

Scheduler (Day View) Portlet

Displays the daily scheduler for users, selected organizations, or facilities belonging to a selected facility group.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Target:

  Select which target you want to display in the portlet. To select organization, select other than "Top".

  The following can be selected

  - Login user
  - Facility Group
  - My Group:

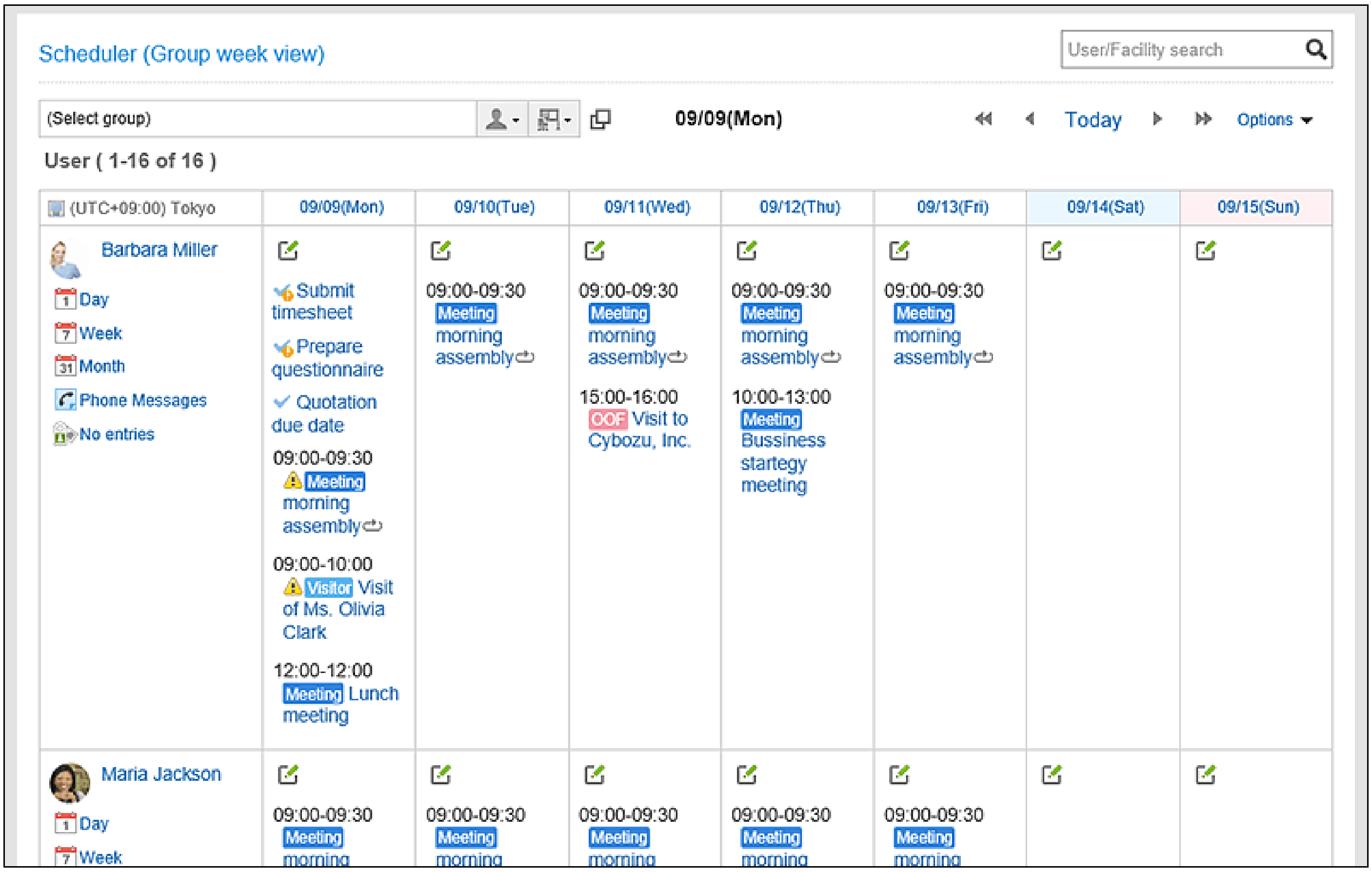
    It will be displayed on the "Portlet settings (Scheduler (Group day view))" screen in My Portal only when the user had already configured My Group.

    For details on My Group and My Portal, refer to the following pages.

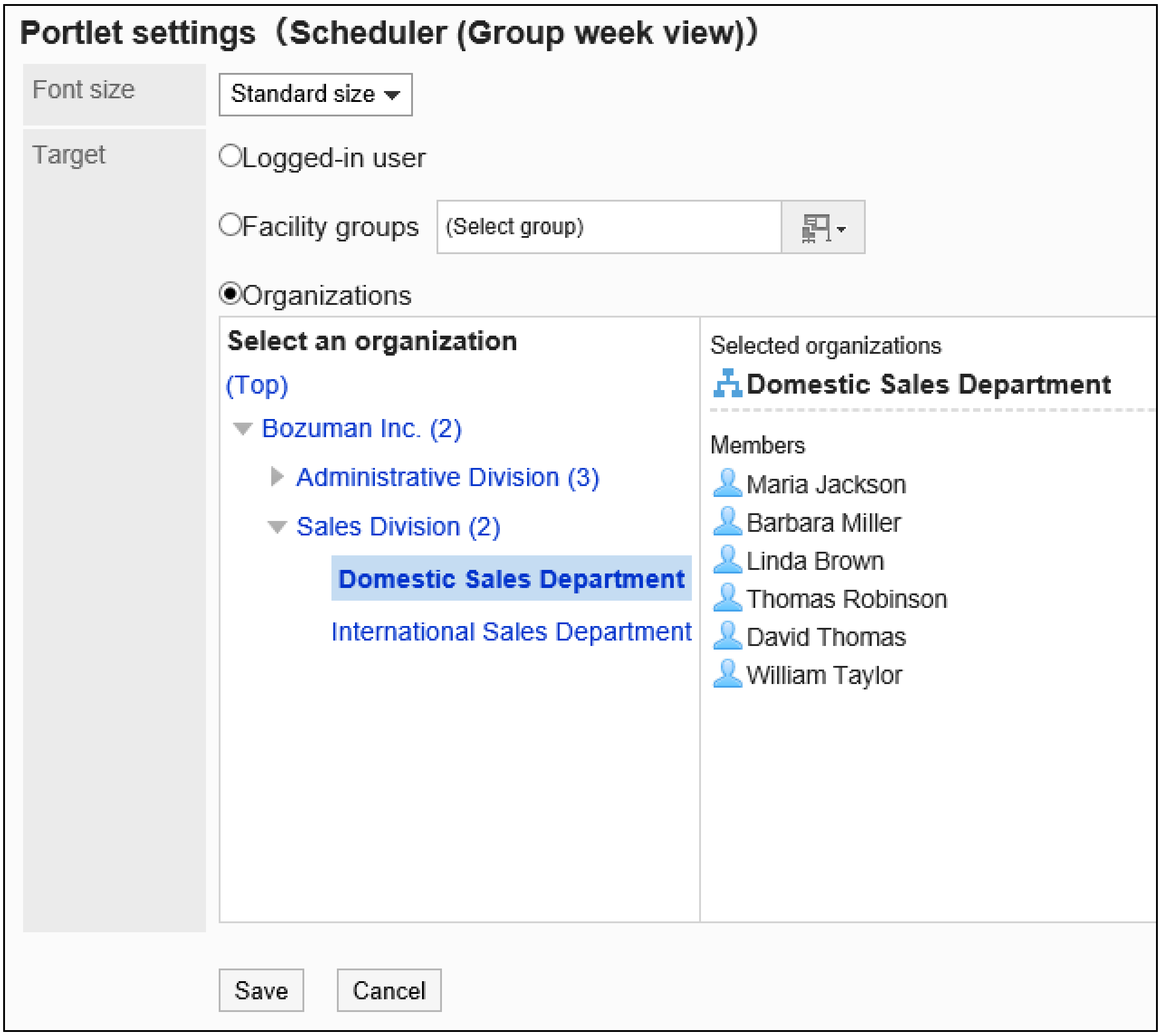
- [My Group Settings]
- [Adding My Portal]
- Organization

Scheduler (Group Week View) Portlet

Displays a one-week scheduler for users, selected organizations, or facilities belonging to a selected facility group.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Target:

  Select which target you want to display in the portlet. To select organization, select other than "Top".

  The following can be selected

  - Login user
  - Facility Group
  - My Group:

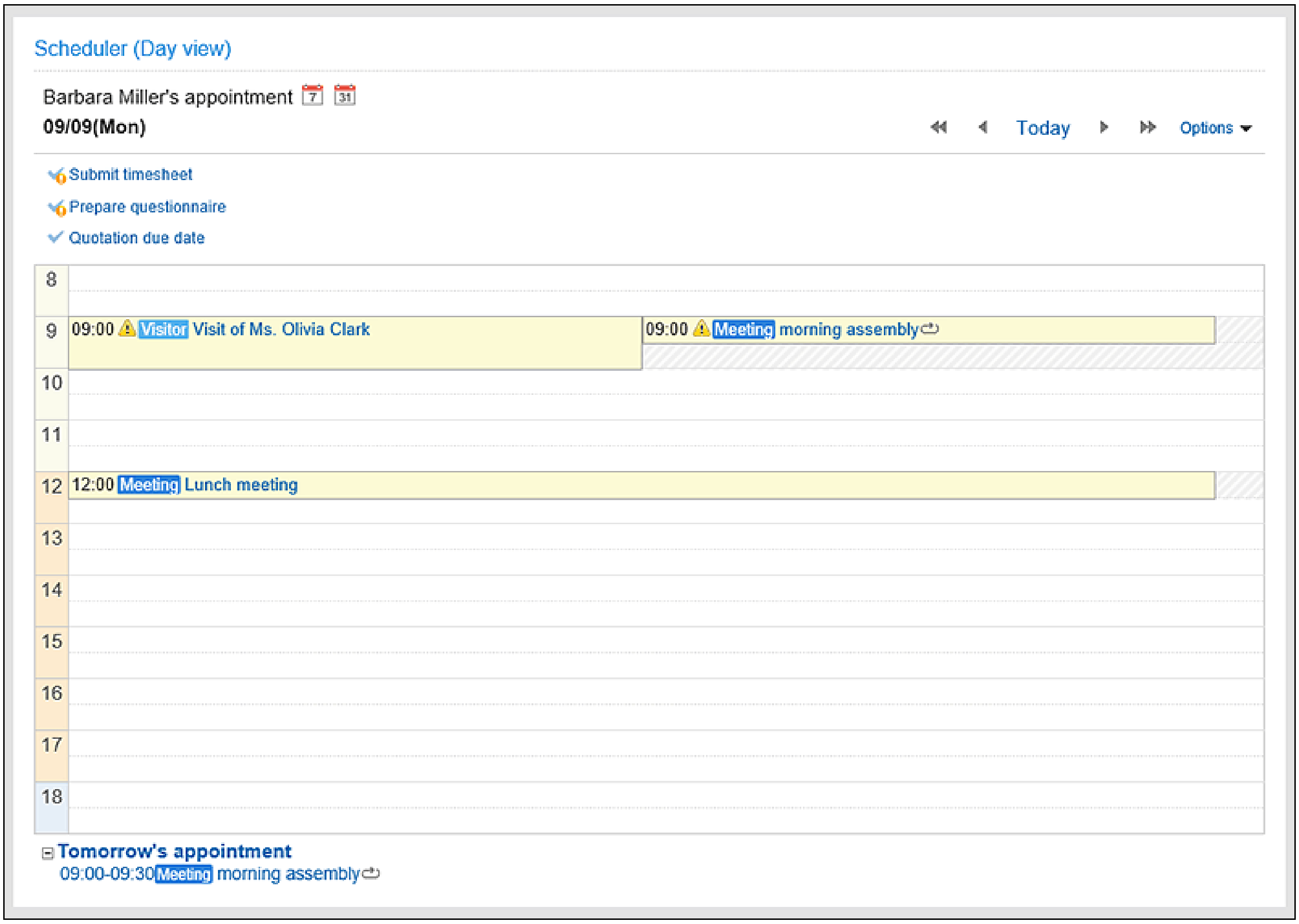
    It will be displayed on the "Portlet settings (Scheduler (Group week view))" screen in My Portal only when the user had already configured My Group.

    For details on My Group and My Portal, refer to the following pages.

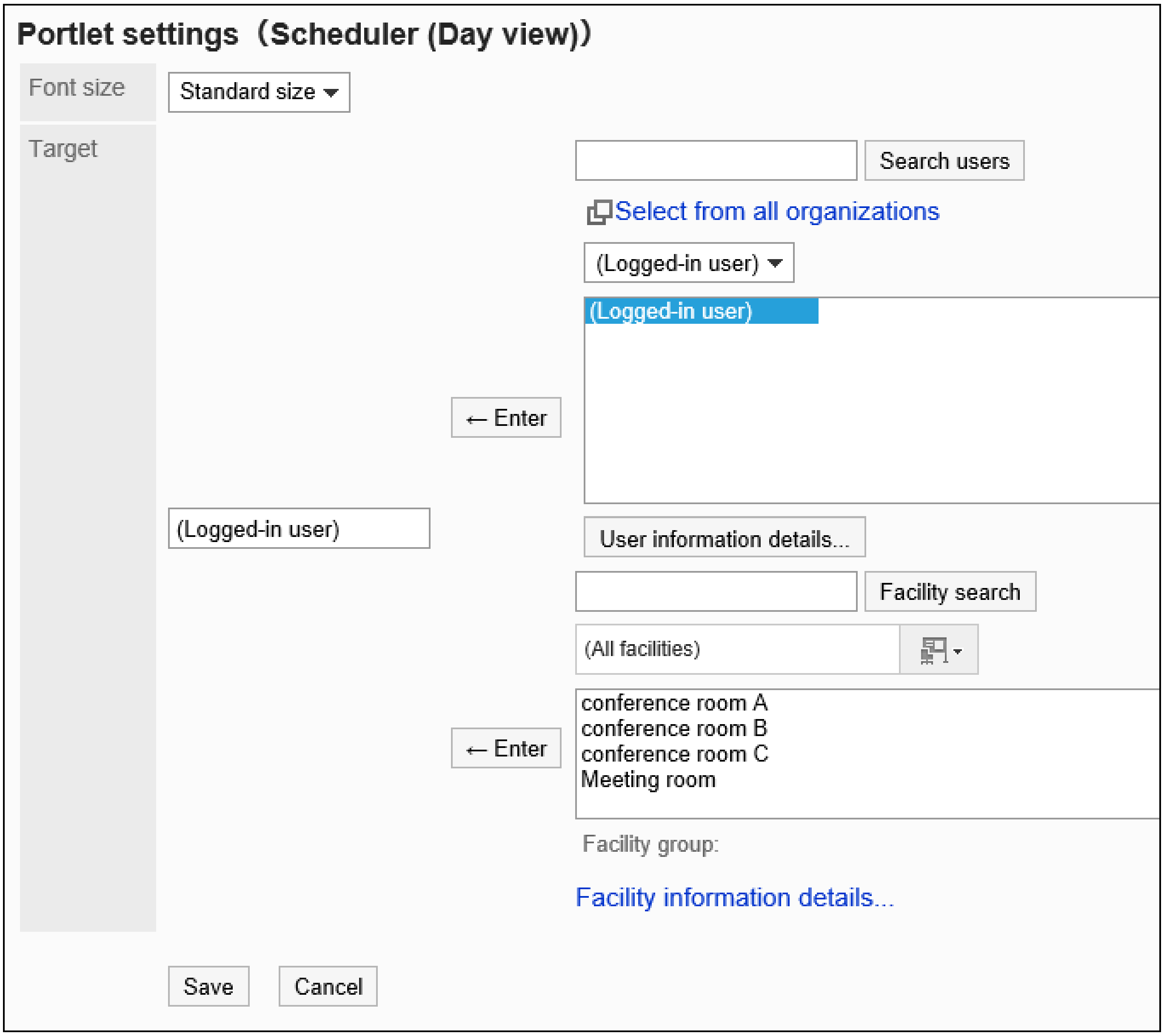
- My Group Settings
- Adding My Portal
- Organization

Scheduler (Day View) Portlet

Displays the daily scheduler for the selected user or facility.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

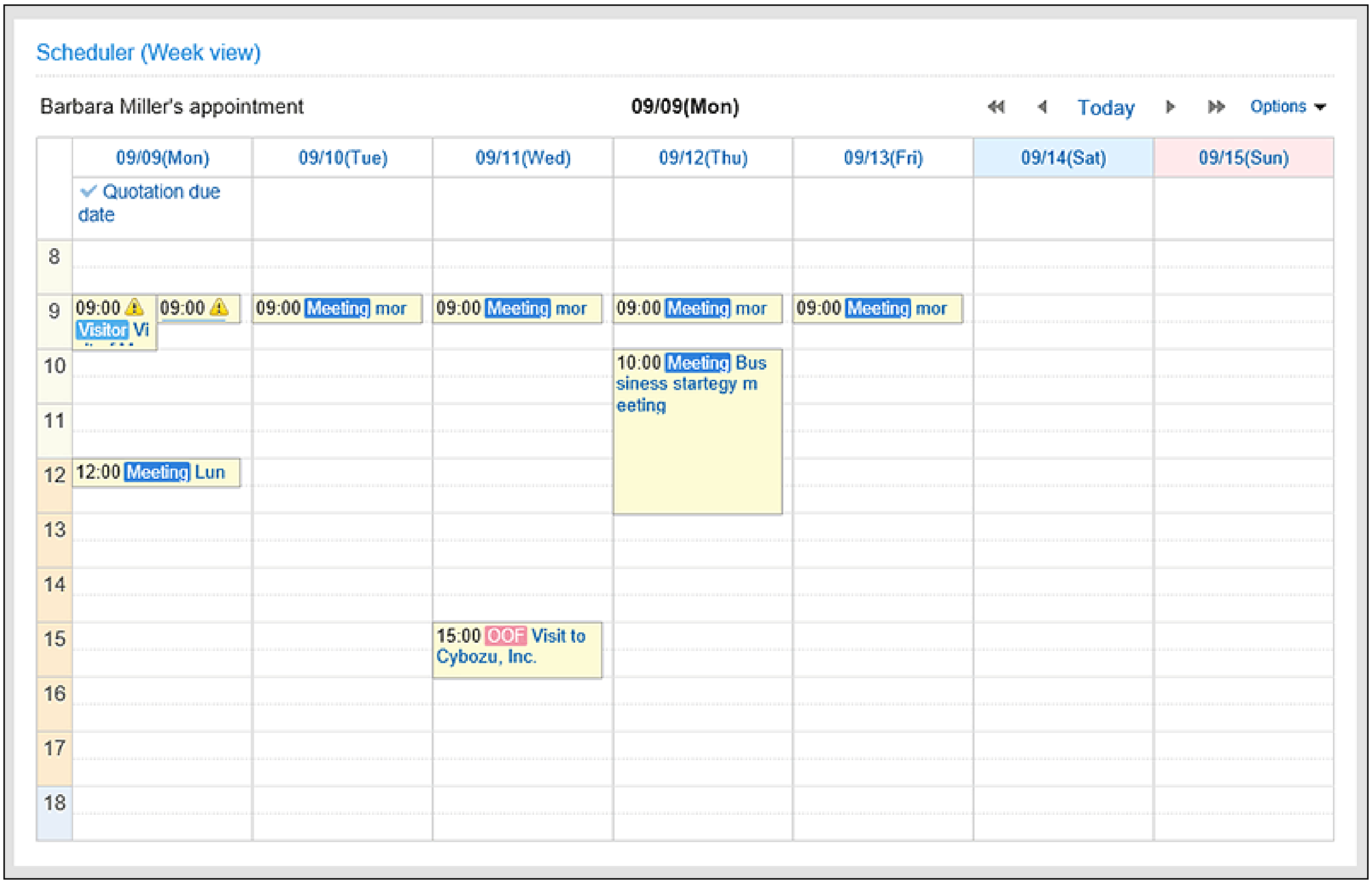
- Target:

  Select a target to display the scheduler in the Portlet.

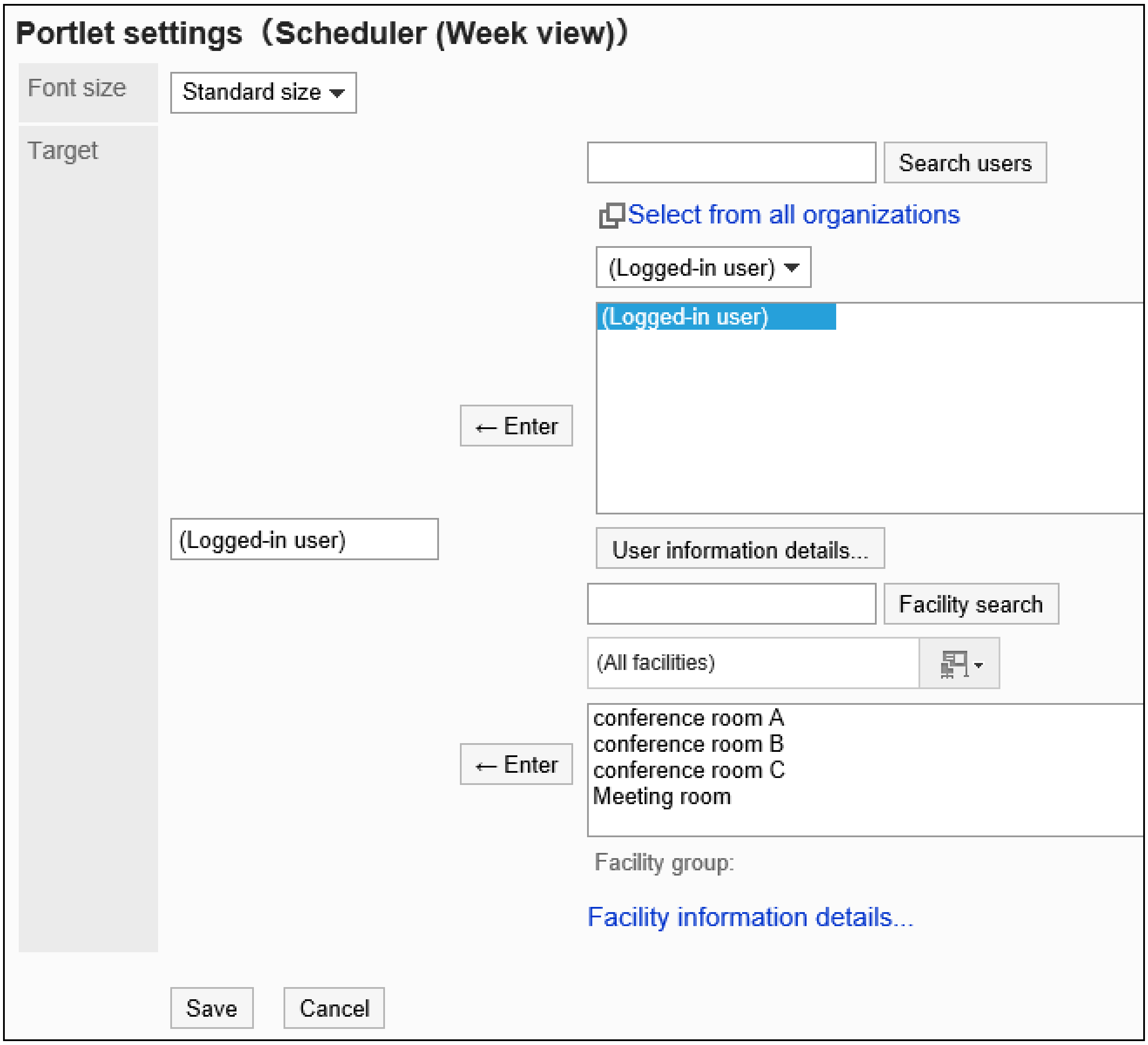
  Select a user, or a facility, and then click "Enter".

Scheduler (Week View) Portlet

A portlet displays the scheduler for the week of the selected user or facility.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

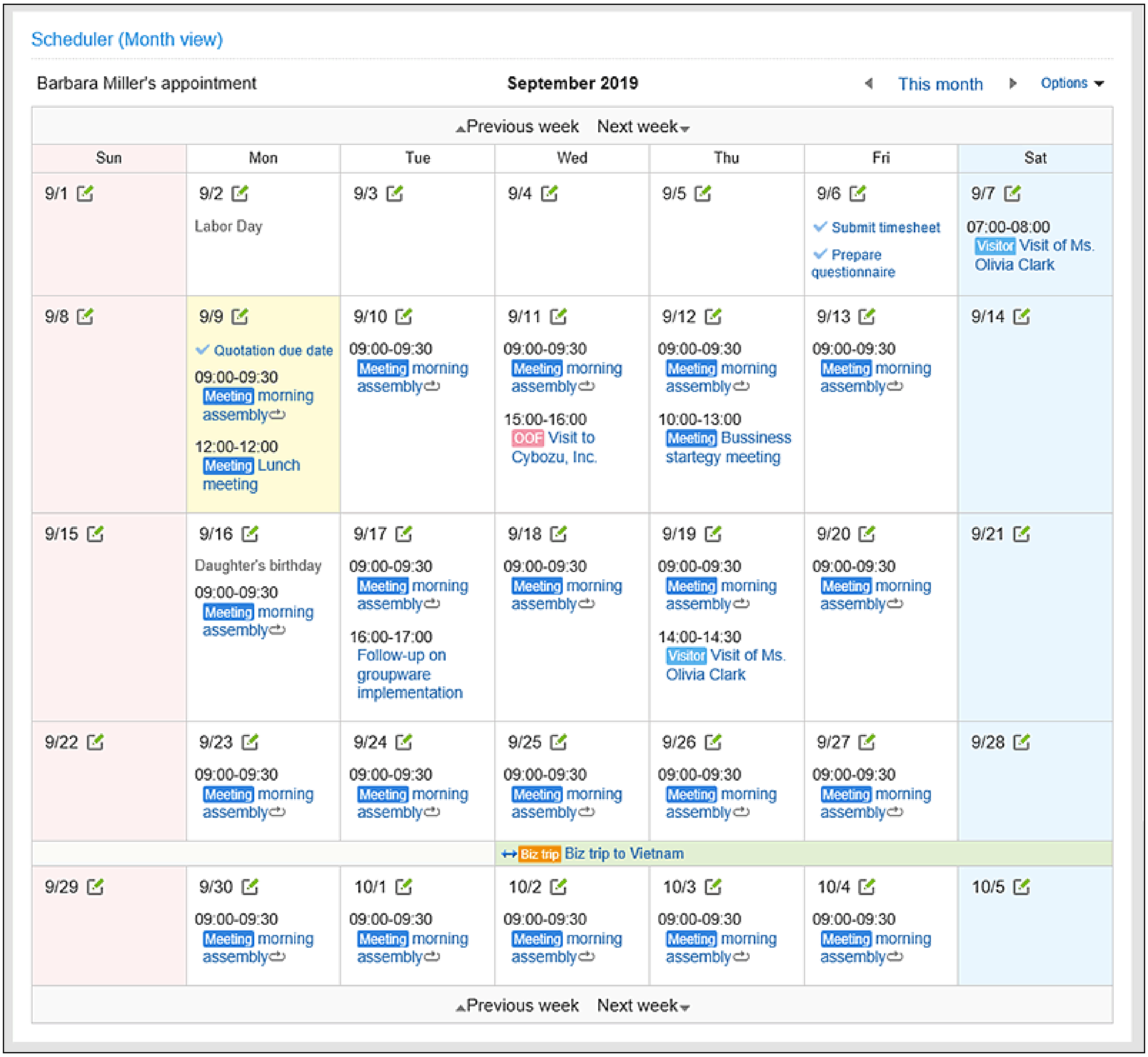
- Target:

  Select a target to display the scheduler in the Portlet.

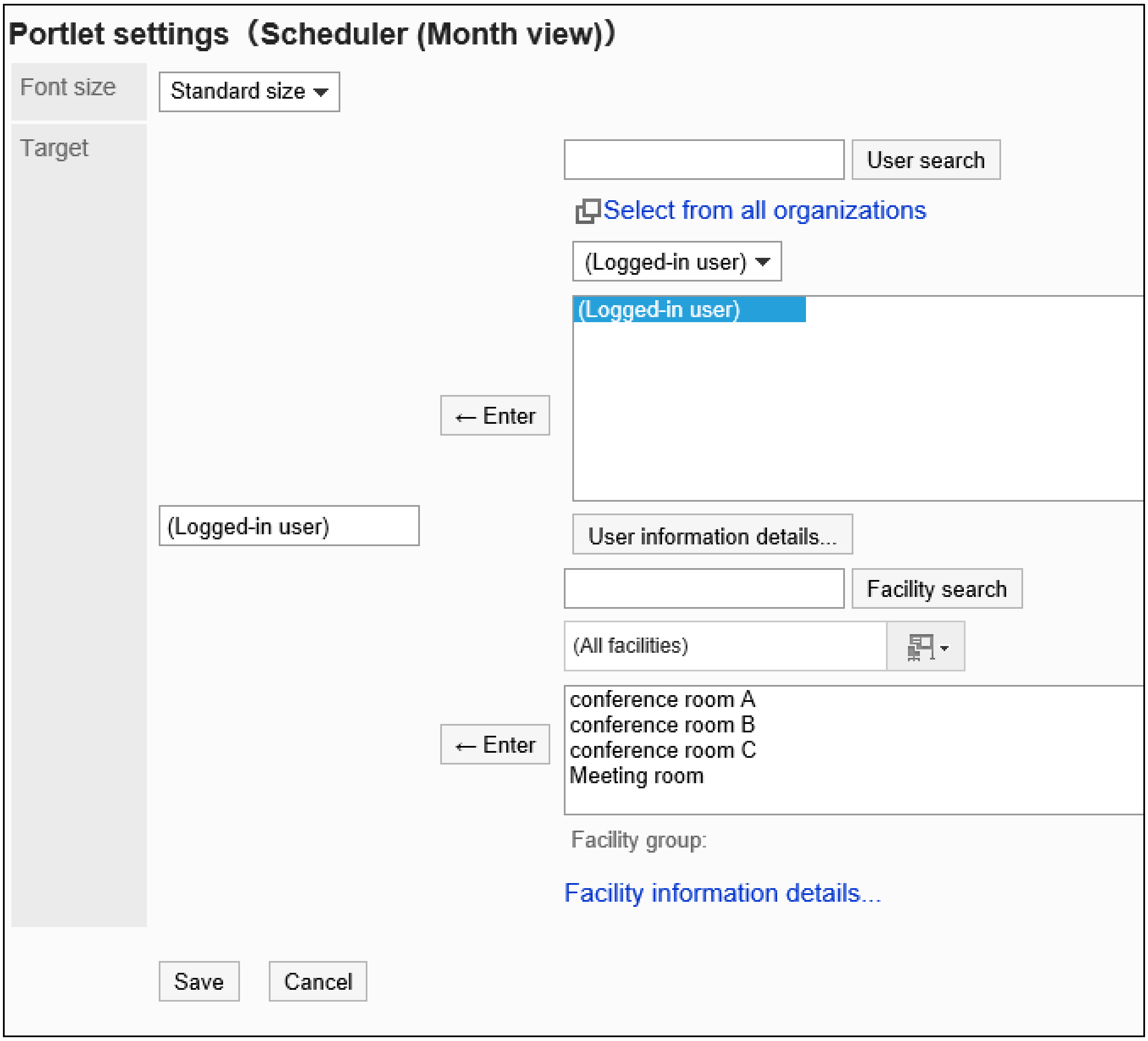
  Select a user, or a facility, and then click "Enter".

Scheduler (Month View) Portlet

Displays the one-month scheduler for the selected user or facility.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

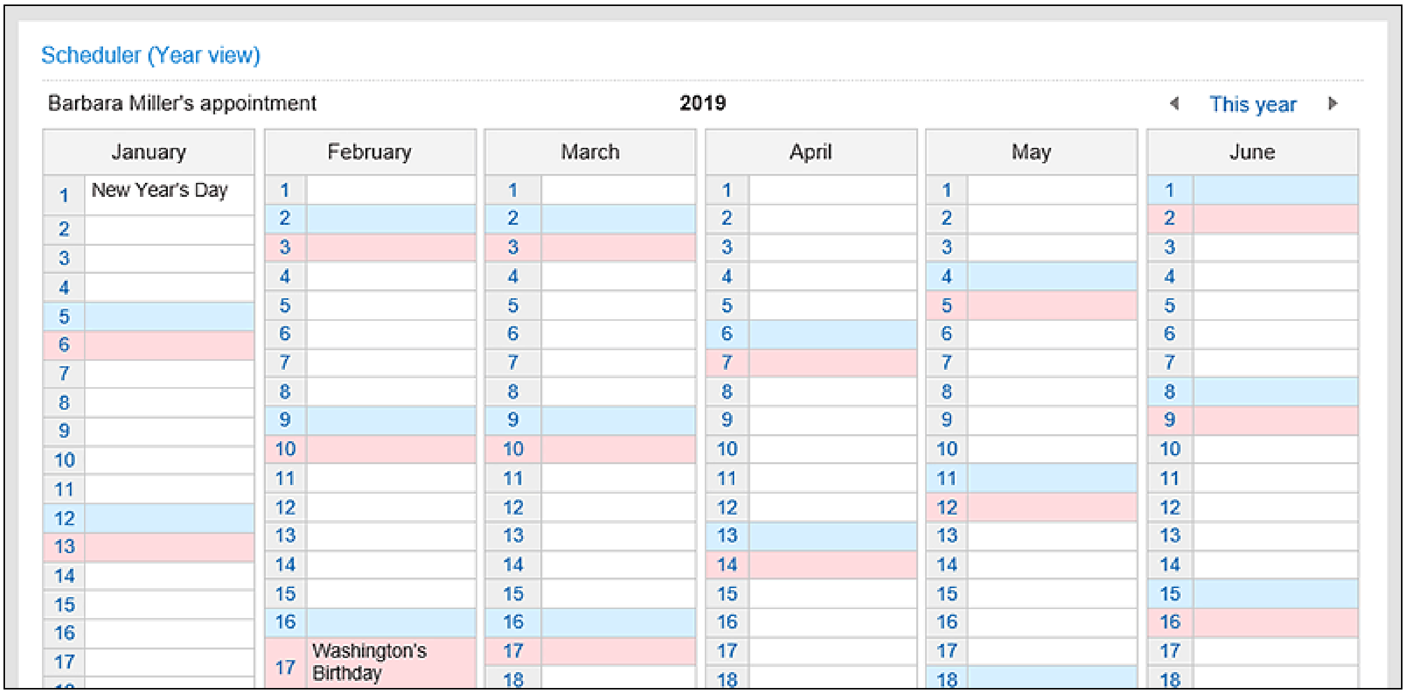
- Target:

  Select a target to display the scheduler in the Portlet.

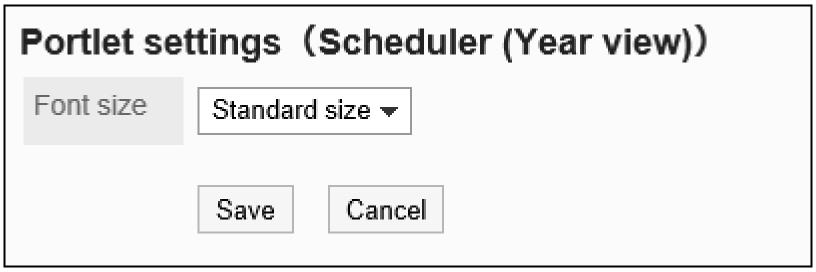
  Select a user, or a facility, and then click "Enter".

Scheduler (Year View) Portlet

The annual planner of the login user is displayed in this portlet. This portlet cannot display the annual planners of other users.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

Schedule Search Portlets

Search Scheduler by user name and facility name.

The OR search can be performed for multiple users and facilities using multiple keywords by separating each keyword with a space.

Setting Options for Portlets

This portlet has no "portlet settings".

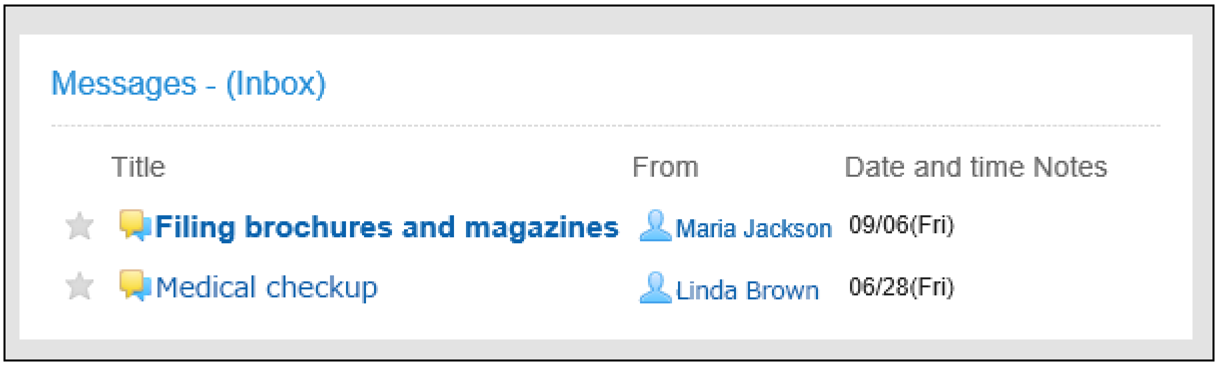
2.1.3.5. Message Portlet

The following portlet types are available in the message portlet

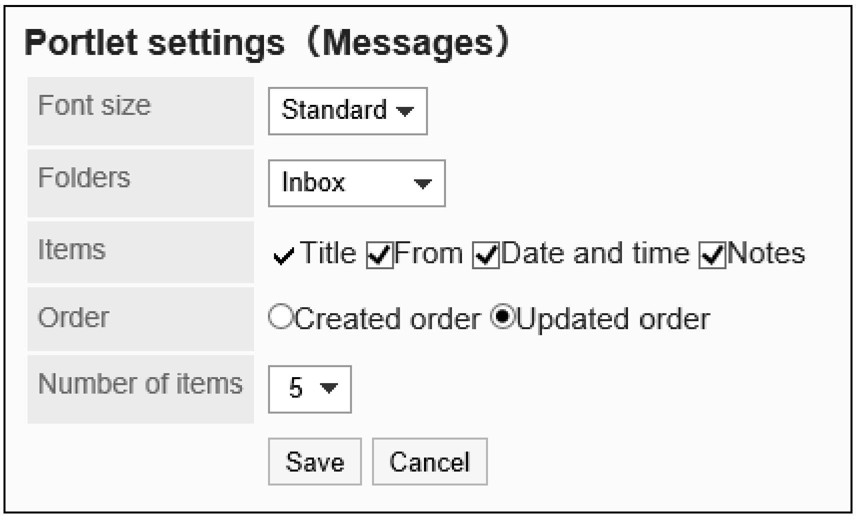
- Messages portlet
- Unread Messages Portlet
- Message Acknowledgment Status Portlet

Messages Portlet

A portlet displays messages in the specified folder.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:
  - Small
  - Standard
  - Large

- Folder:

  Select the folder of messages you want to display in the portlet.

  The following folders are available
  - Inbox
  - Send Box
  - Draft

- Items:

  Select the items to display in the portlet. You cannot hide "Subject".

  The following items can be selected:
  - From
  - On
  - Remarks

- Order:

  Select the order in which you want to display messages.

  Select the order of creation or the order of updates.
- Number of items:

  Select the number of messages to display in the portlet.

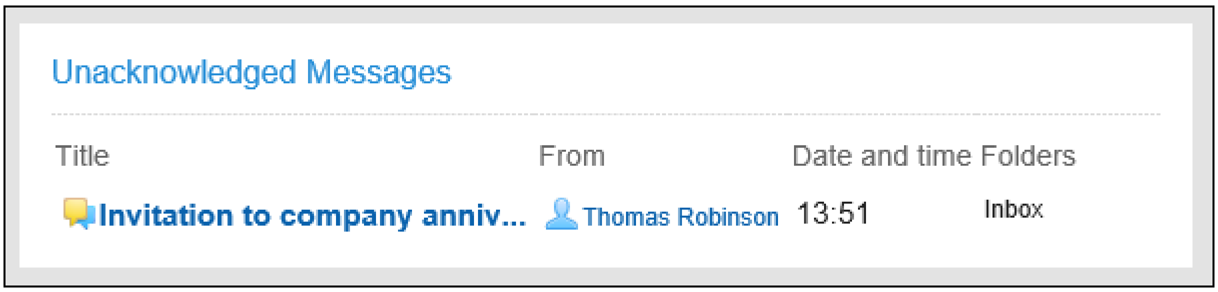
  You can select up to 20 notifications.

Unread Messages Portlet

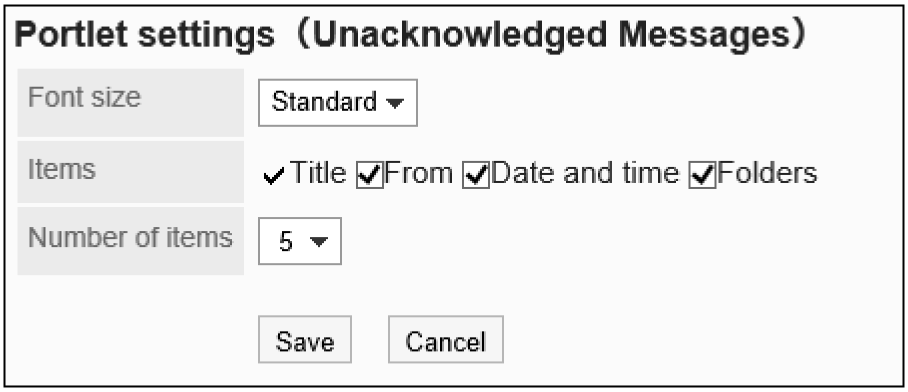
The View status confirmation message is displayed as a portlet.

If the system administrator has set the view status to "Manual", when the user opens the message, a confirmation button is displayed.

When the user clicks "Confirm", the message is deleted from the "unacknowledged messages" portlet.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:
  - Small
  - Standard
  - Large

- Items:

  Select the items to display in the portlet. You cannot hide "Subject".

  The following items can be selected:
  - From
  - On
  - Folders

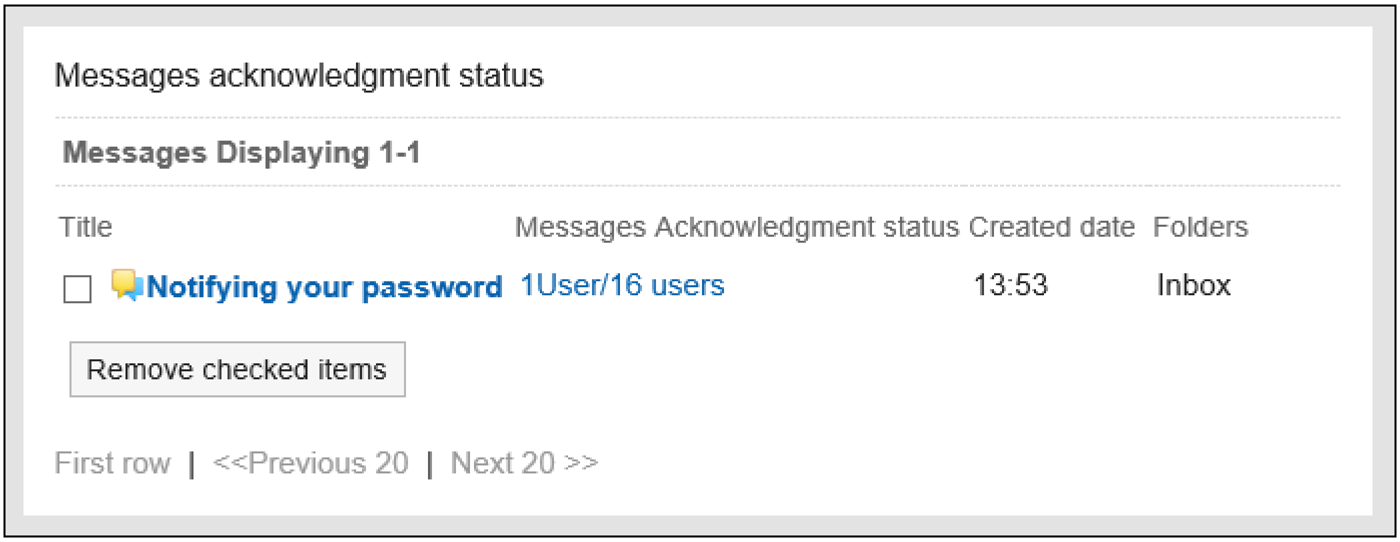
- Number of items:

  Select the number of messages to display in the portlet.

  You can select up to 20 notifications.

Message Acknowledgment Status Portlet

Confirm the status of the View status confirmation message. You can view messages by clicking the subject.



Setting Options for Portlets

- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Items:

  Select the items to display in the portlet. You cannot hide "Subject".

  The following items can be selected:

  - Acknowledgment status
  - Created on
  - Folders

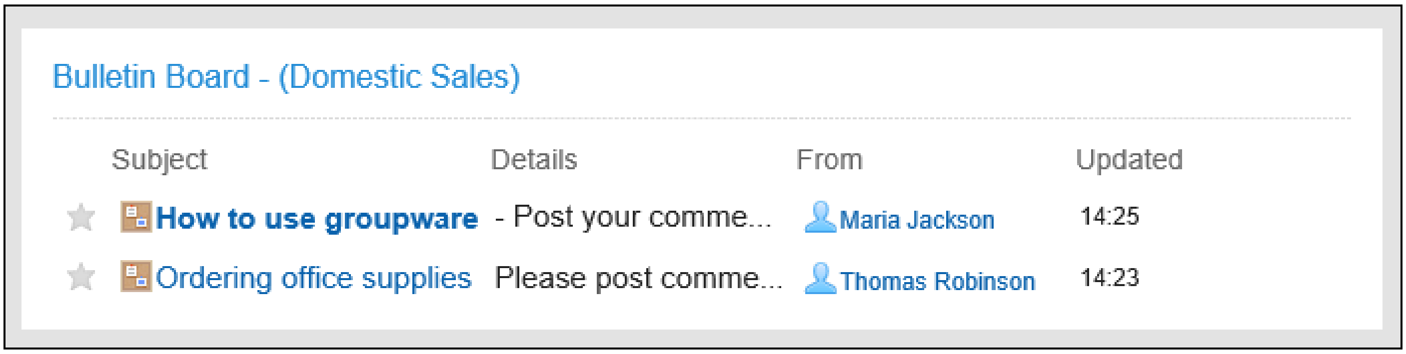
2.1.3.6. Bulletin Board Portlet

The bulletin board portlet has the following types of portlets

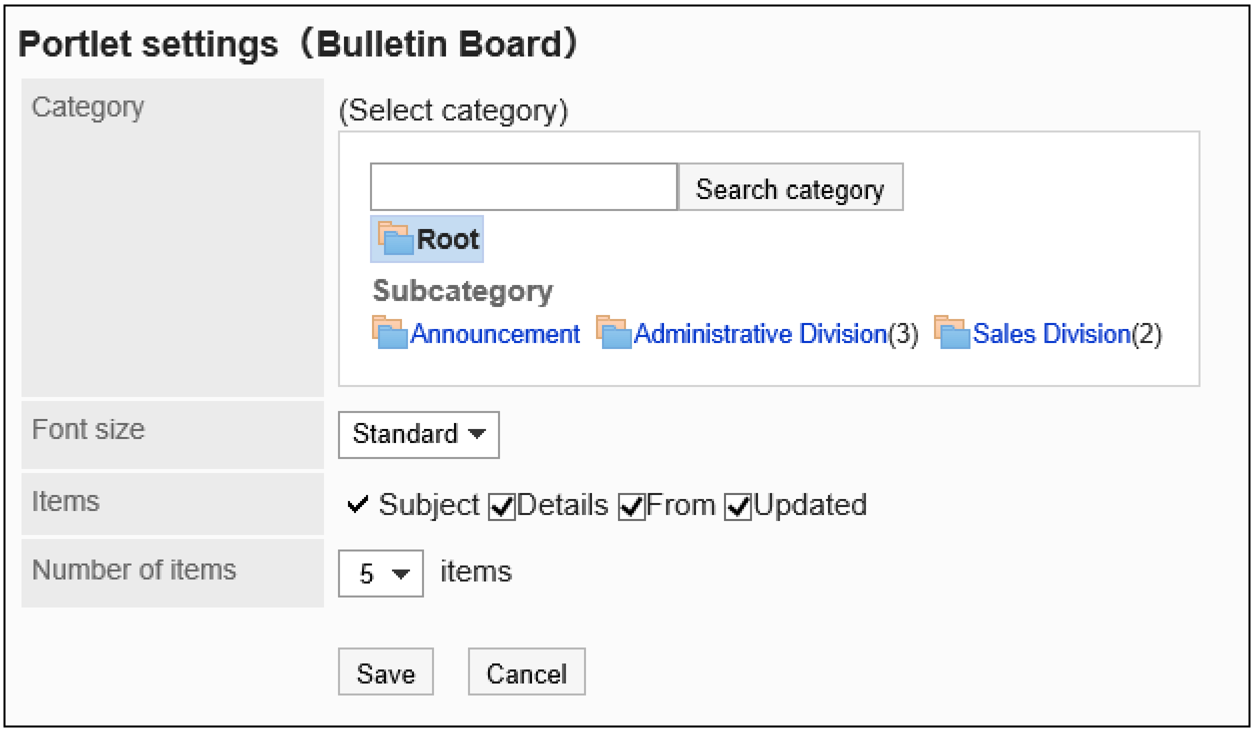
- Bulletin Board portlet
- Unacknowledged topics portlet

Bulletin Board Portlet

This portlet displays bulletin board topics.



Setting Options for Portlets



- Category:
  Set the category you want to display.

- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:
  - Small
  - Standard
  - Large

- Items:

  Select the items to display in the portlet.

  Title cannot be hidden.

  The following items can be selected:
  - Contents
  - From
  - Updated

- Number of items:

  Select the number of topics to display in the portlet.

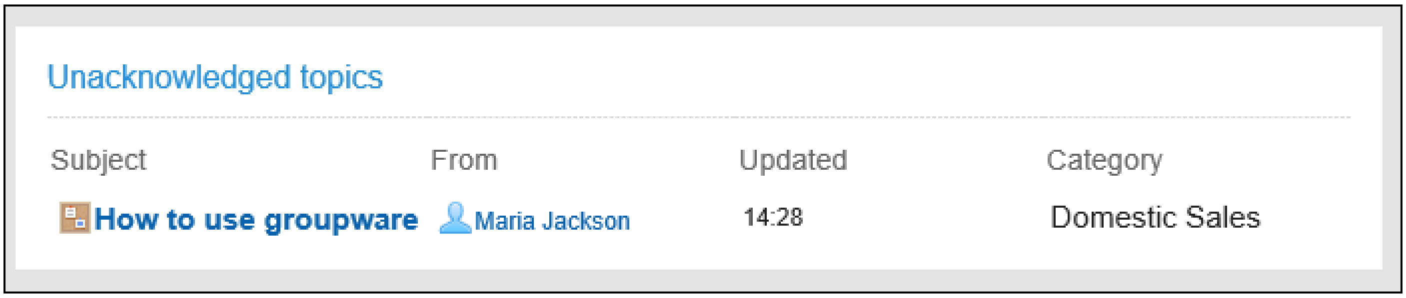
  You can select up to 20 notifications.

Unacknowledged Topics Portlet

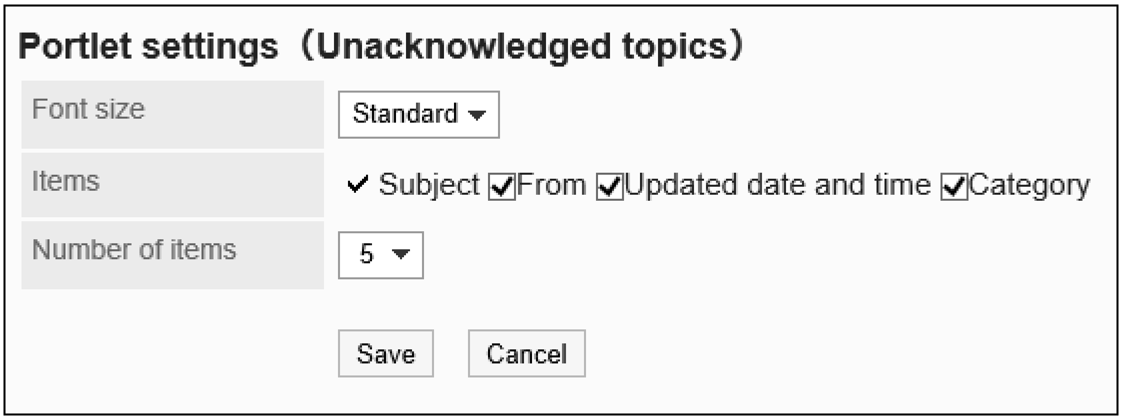
Unread topics that meet the following conditions are displayed:

- The "Request recipient's acknowledgment" check box is selected
- You have been set as a recipient of the topic

Once you display the "Topic details" screen of an unread topic, the topic will be removed from the Unacknowledged topics portlet,



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Items:

  Select the items to display in the portlet.

  Title cannot be hidden.

  The following items can be selected:

  - From
  - On
  - Category

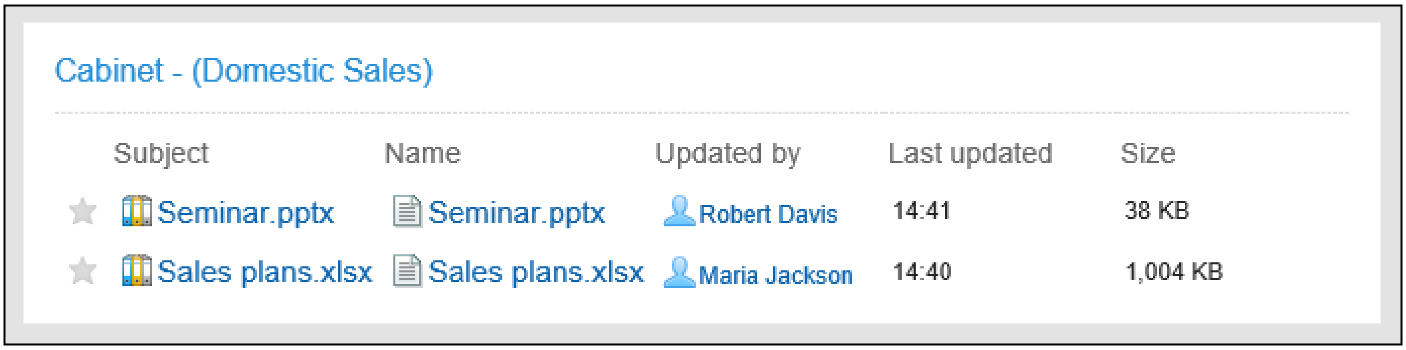
- Number of items:

  Select the number of topics to display in the portlet.

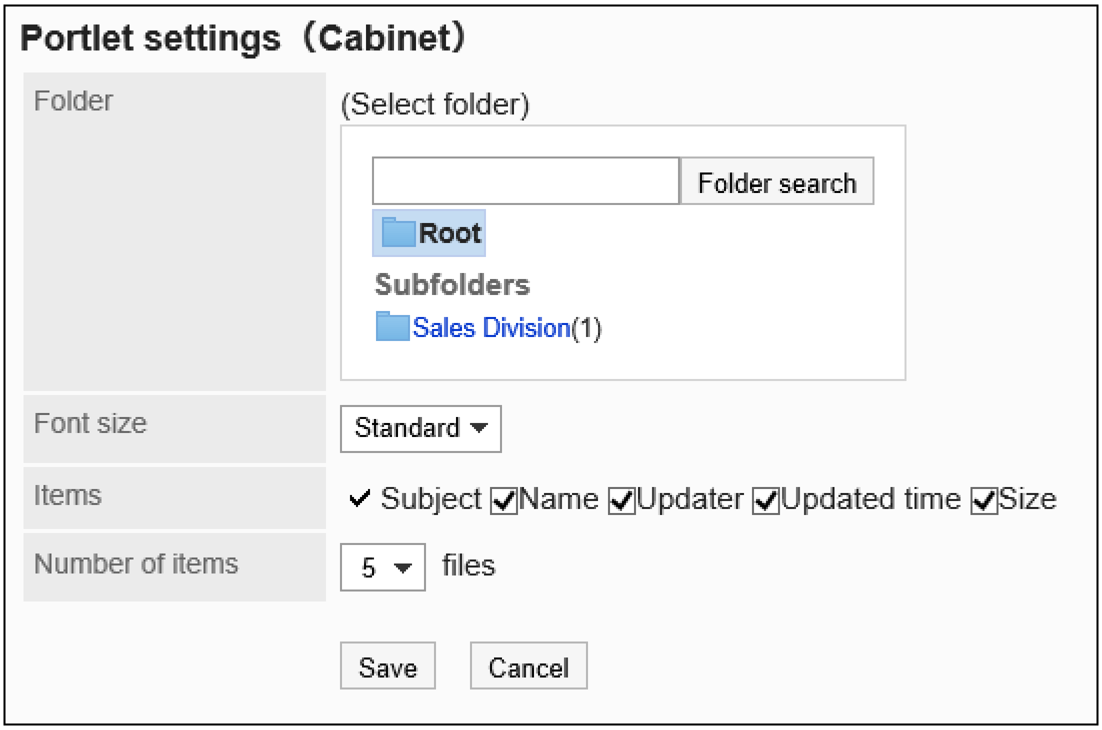
  You can select up to 20 notifications.

2.1.3.7. Cabinet Portlet

This portlet displays files in the specified folder.



Setting Options for Portlets



- Folder:

  Set the folder that you want to display.

- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Items:

  Select the items to display in the portlet.

  Title cannot be hidden.

  The following items can be selected:

  - File name
  - Updated by
  - Updated

    - Size

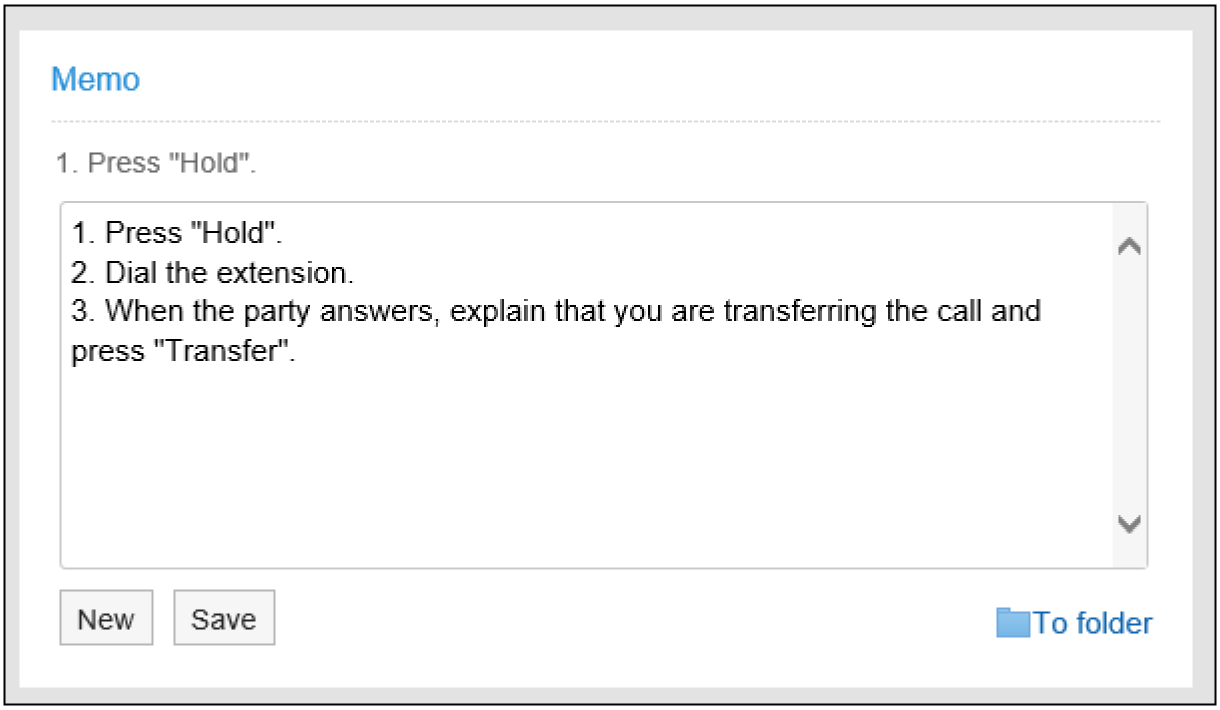
- Number of items:

  Select the number of files to display in the portlet.

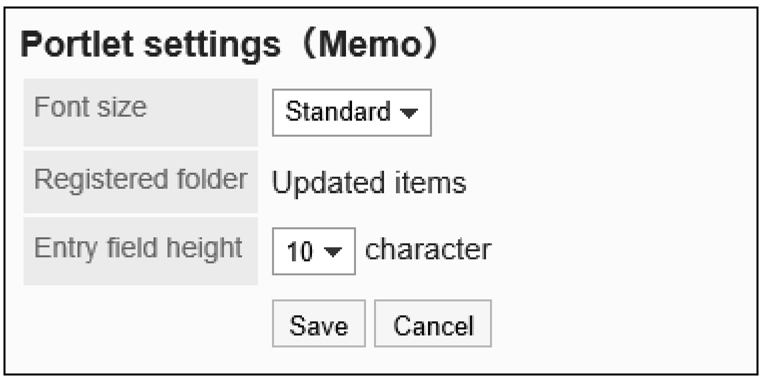
  You can select up to 20 notifications.

2.1.3.8. Memo Portlets

The notes portlet is a portlet that allows you to save notes that you have created in the Portal text box.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:
  - Small
  - Standard
  - Large

- Registered folder:

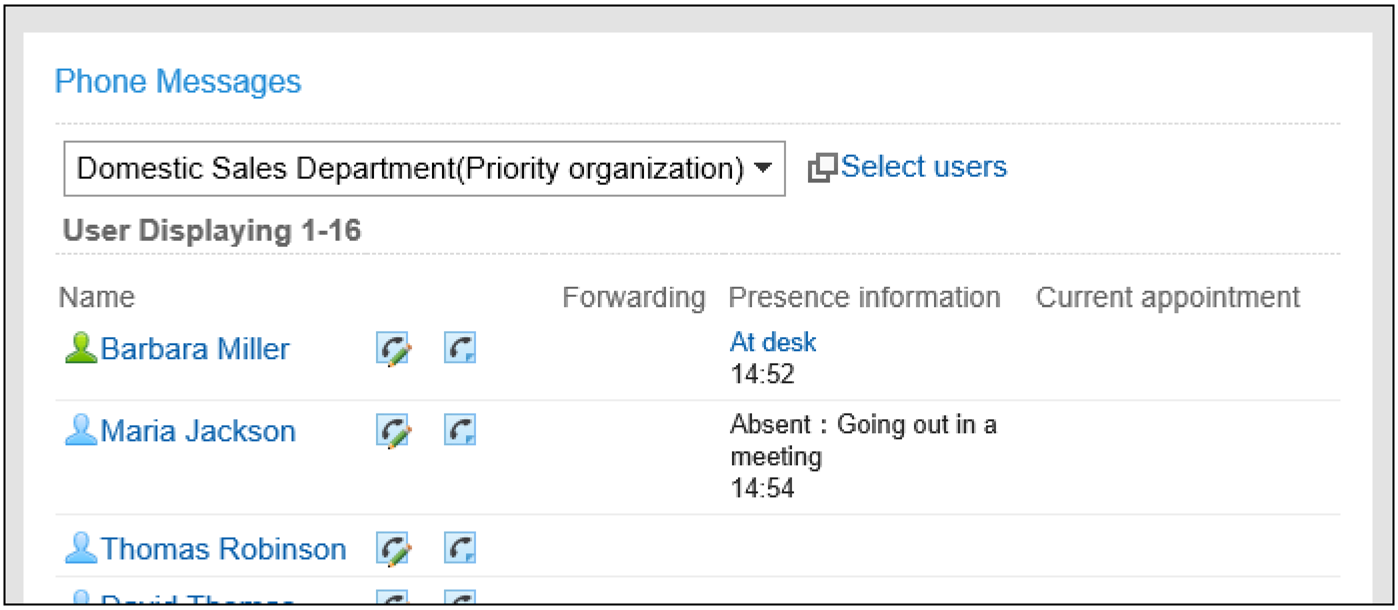
  Only the "updated" folder is available.
- The vertical length of the input field

  Set the vertical length of the input field in characters.

  The number of characters can be set as follows
  - 3
  - 5
  - 10
  - 20
  - 30

2.1.3.9. Phone Message Portlet

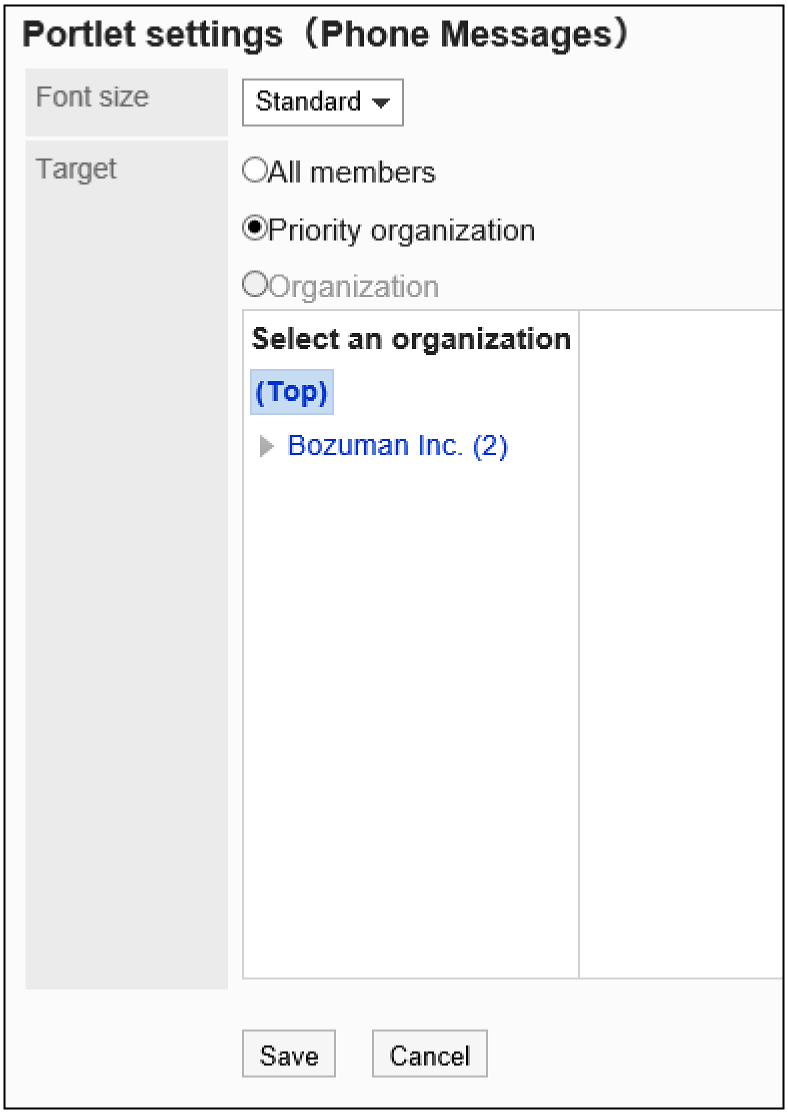
This portlet displays the phone notes of the specified organization or group.



Note

- For users who have set up the e-mail forwarding of phone messages, is displayed in the "Forwarding Settings" field .

Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Target:

  Select which target you want to display in the portlet. To select organization, select other than "Top".

  The following can be selected

- All
- Priority organization
- Organization

2.1.3.10. Timesheet Portlet

The timecard is displayed. The start time and end time are recorded in the timecard.

Setting Options for Portlets

This portlet has no "portlet settings".

2.1.3.11. To-Do List Portlet

The to-do list of uncompleted individuals is displayed.

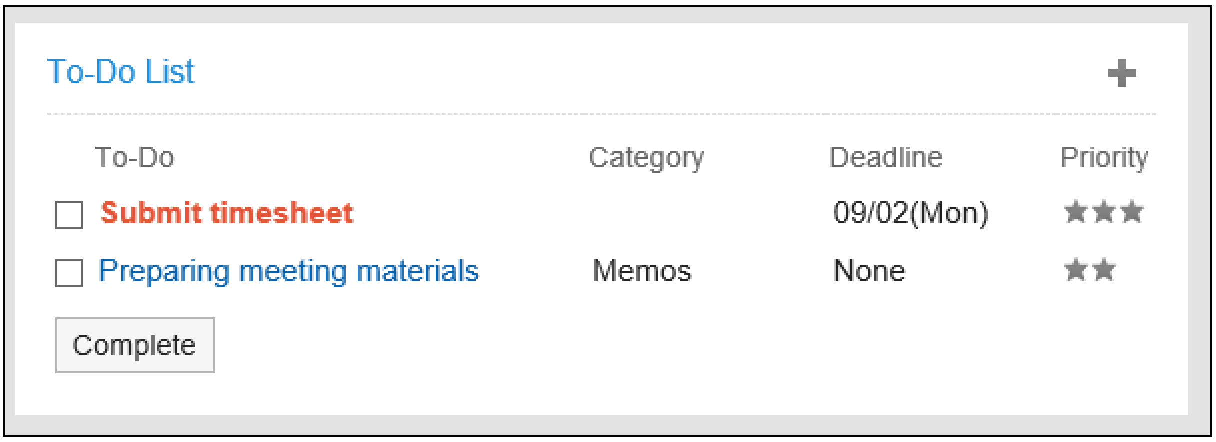
To-Do names are displayed in the following colors according to their due dates:

- Bold red:

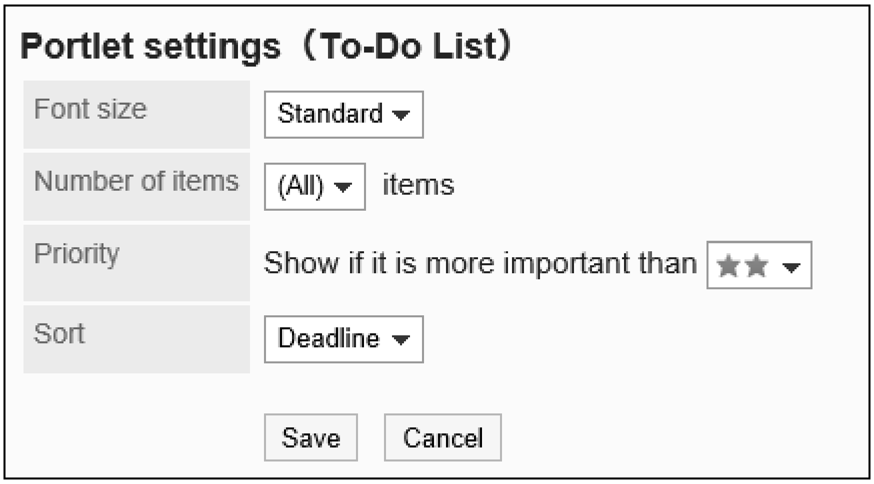
  To-do tasks past the due date
- Blue Bold:

  To-do tasks whose due dates are today
- 青字：

  To-do tasks before due dates and whose due dates are not set



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Number of Displays:

  Select the number of Tasks to display in the portlet.

  The number of items can be set (all) or from 1 to 10.

- Importance:

  Select the priority of the to-do Tasks that you want to display in the portlet.

- Sort:

  Select an item to sort the to-do Tasks that you want to display in the portlet.

  The following items can be selected:

  - Category
  - Due date

- Importance level

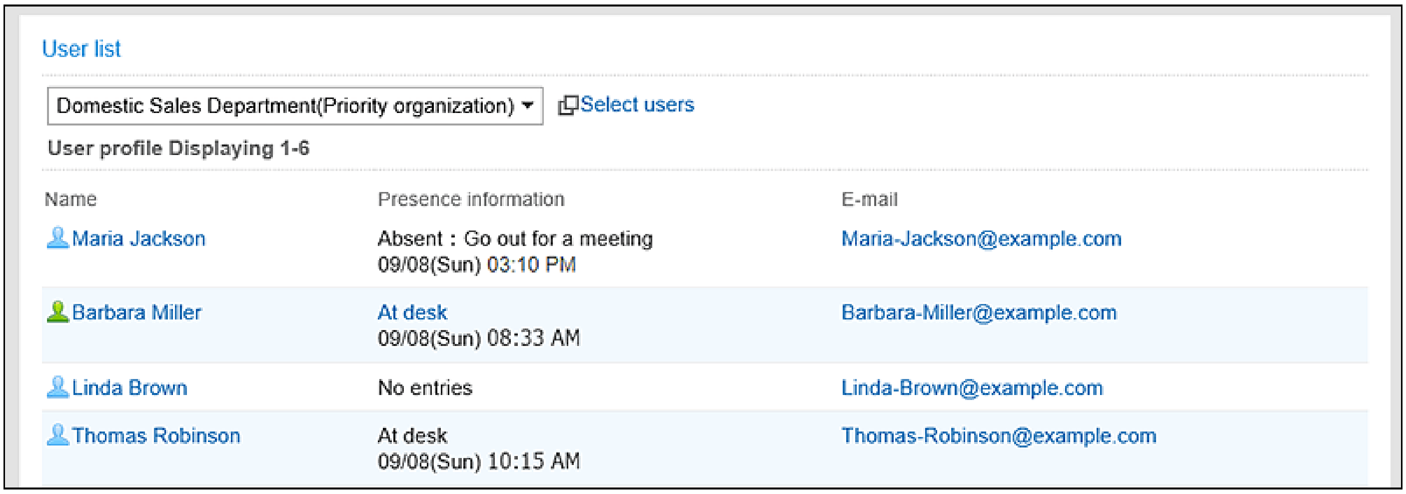
2.1.3.12. Address Book Portlet

The following portlet types are available in the Address book Portlet

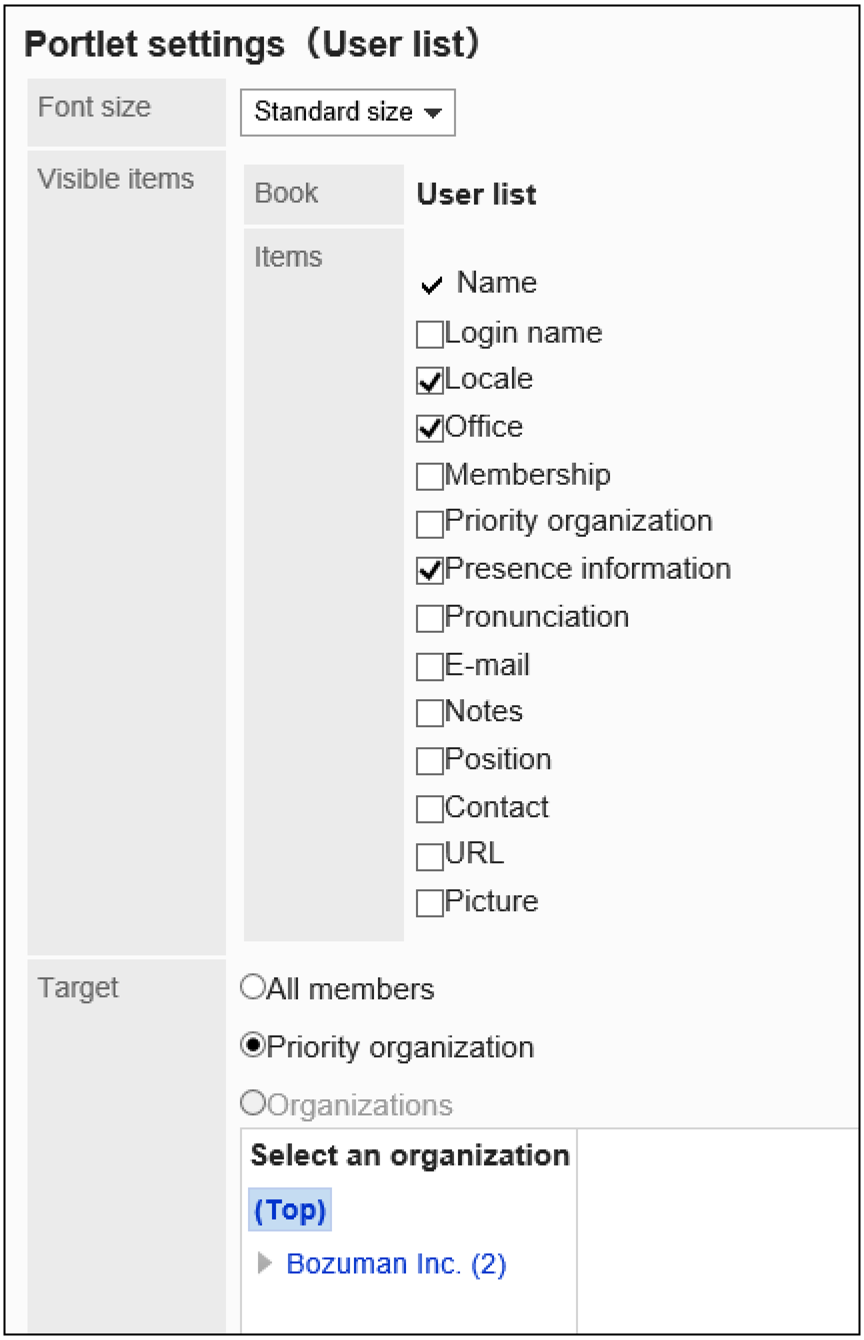
- User List Portlet
- Address Book Search Portlets

User List Portlet

This portlet displays the user list. You can check the user information by clicking the user name.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Items to be displayed

  The only book name you want to display is the user list.

  In the item, select an item for the user information.

- Target:

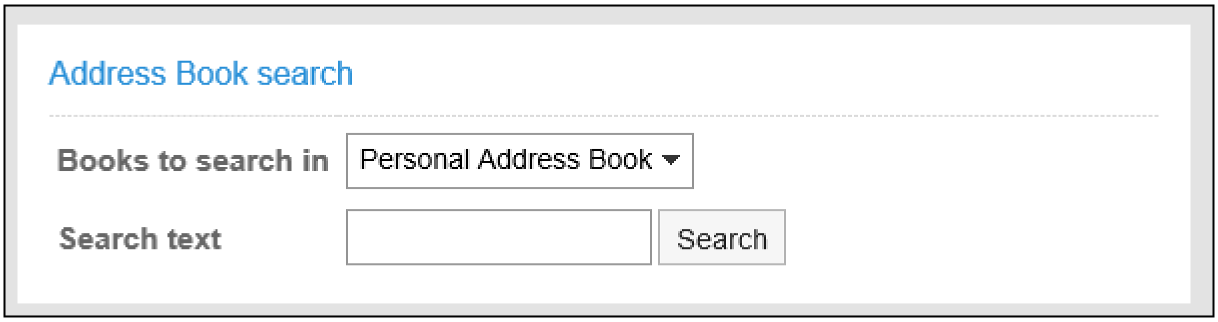
  Select which target you want to display in the portlet. To select organization, select other than "Top".

  The following can be selected

- ◦ All
- ◦ Priority organization
- ◦ Selected organizations

Address Book Search Portlets

Search addresses from each book in the Address Book.



Setting Options for Portlets

This portlet has no "portlet settings".

2.1.3.13. E-mail Portlet

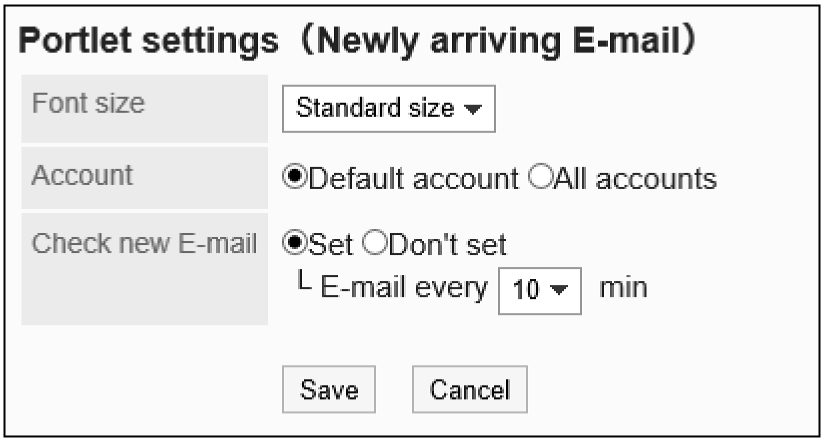
The following types of portlets are available in the e-mail portlet

- New E-mail Portlet
- E-mail portlet

New E-mail Portlet

This portlet displays the number of new e-mail. You can specify which account you want to view.

Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Account:

  Select the e-mail account you want to display in the portlet.

  Select default account or all accounts.

- New e-mail check:

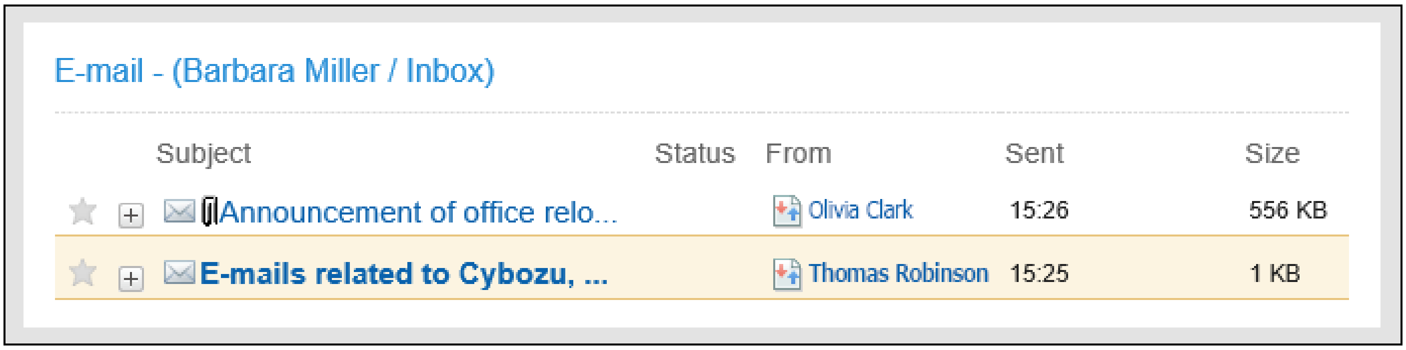
  Set the interval for checking the new e-mail.

  To check the new e-mail, select the interval for checking e-mail.

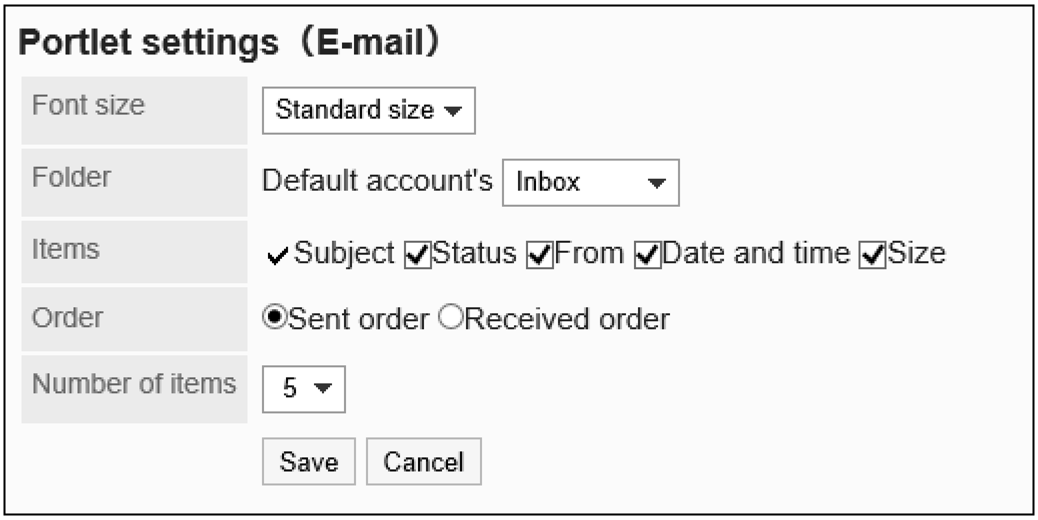
  From the drop-down list, select up to 60 Minutes in 5-minute increments.

E-mail Portlet

This portlet displays a list of e-mails. You can specify the account or folder you want to view.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Folder:

  Select the folder of the e-mail account you want to display in the portlet.

  The following folders are available

  - Inbox
  - Send Box
  - Draft

- Items:

  Select the items to display in the portlet. You cannot hide "Subject".

  The following items can be selected:

  - Status
  - From
  - On
  - Size

- Order:

  Set the order of e-mail.

  Select the order of sent date and time and the order of reception.

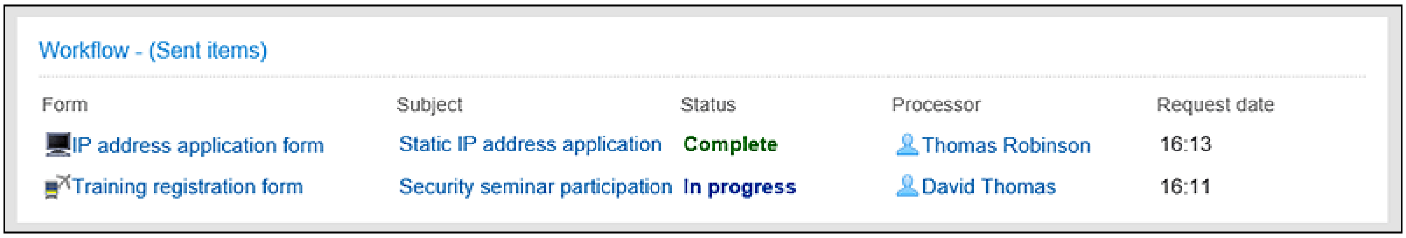
- Number of items:

  Select the number of e-mails to display in the portlet.

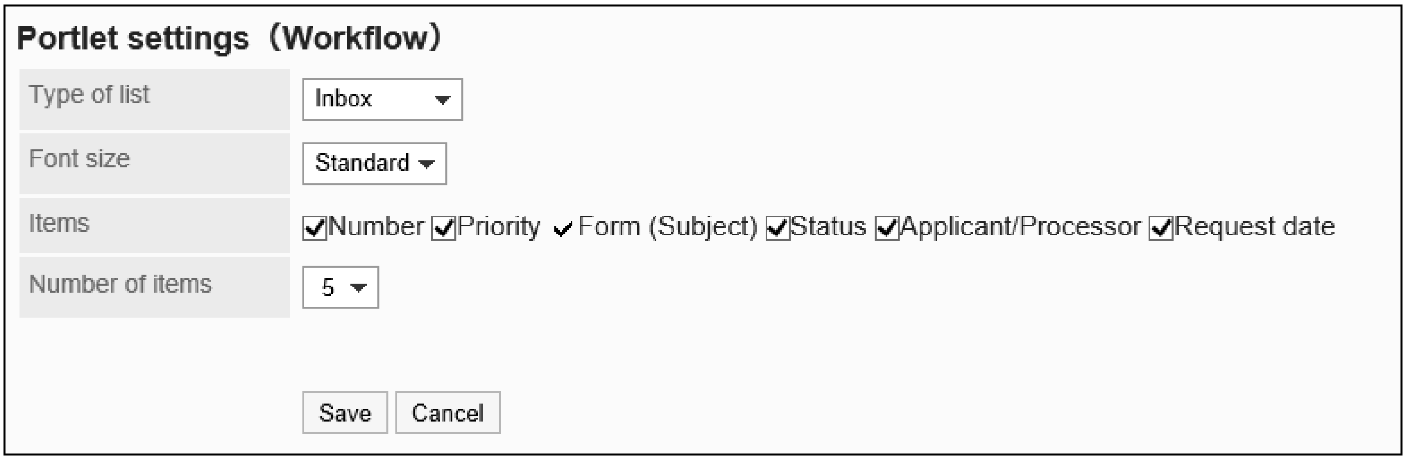
  You can select up to 20 notifications.

2.1.3.14. Workflow Portlet

A portlet displays a list of requests for the specified folder.



Setting Options for Portlets



- Type of List

  Select the folder where you want the request to appear in the portlet.

  The following folders are available

  - Inbox list
  - Sent items list
  - Draft

- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard

  - Large

- Items:

  Select the items to display in the portlet. The "Request form name" cannot be hidden.

  The following items can be selected:

  - Number
  - Priority
  - Status
  - Applicant/Processor
  - Request Date

- Number of items:

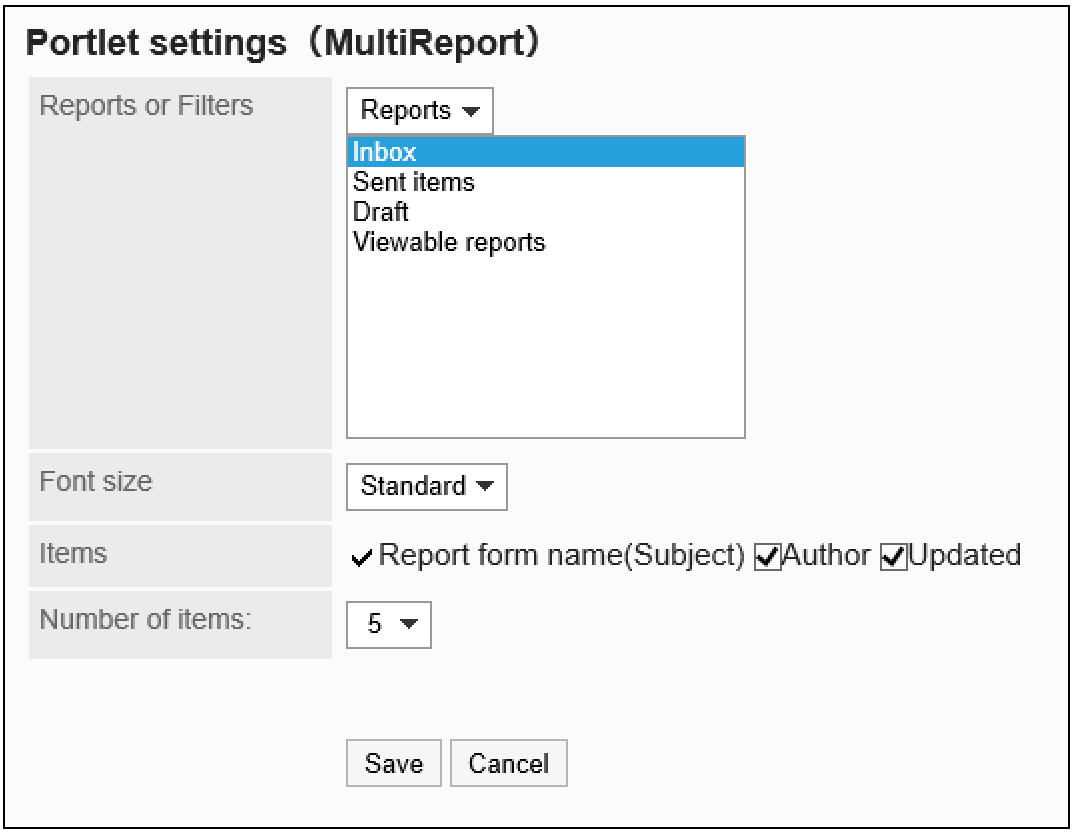
  Select the number of requests to display in the portlet.

  You can select up to 20 notifications.

2.1.3.15. Multireport Portlet

This portlet displays a list of the specified folder and the filtered report.

Setting Options for Portlets



- Report/Filter

  Select the type of report that you want to display in the Portlet, or the filter that you want to apply to the report.

  The folder or filter can be specified as follows

  - Inbox list
  - Sent items list
  - Draft
  - The filter

- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Items:

  Select the items to display in the portlet.

  The "Report form name" cannot be hidden.

  The following items can be selected:

  - Created by
  - Updated

- Number of items:

  Select the number of requests to display in the portlet.

  You can select up to 20 notifications.

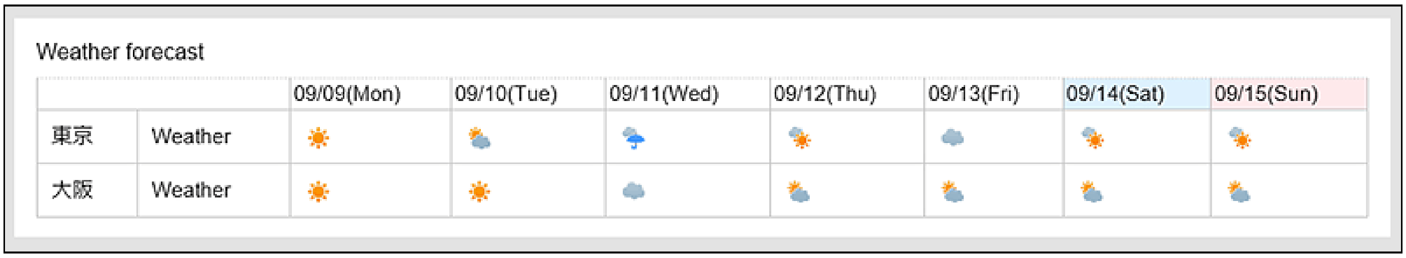
2.1.3.16. Cybozu Online Service Portlet

The following types of portlets are available in the Net Connector service Portlet

- Weather Forecast Portlet

Weather Forecast Portlet

This portlet displays the weather forecast in Japan. You can select the regions you want to view. Only the weather forecast in Japan can be displayed.



Weather forecast

		09/09(Mon)	09/10(Tue)	09/11(Wed)	09/12(Thu)	09/13(Fri)	09/14(Sat)	09/15(Sun)
東京	Weather							
大阪	Weather							

Setting Options for Portlets

- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Roku:

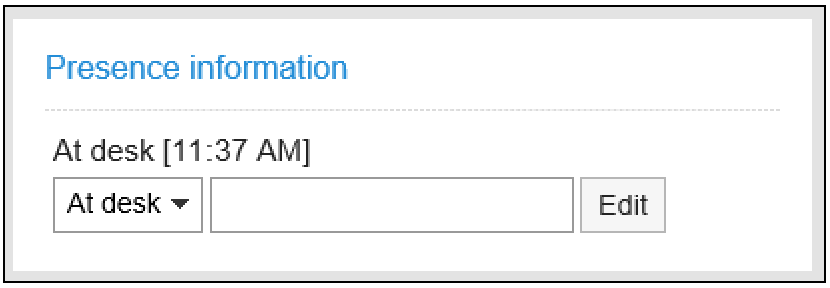
  Select whether to show the six-you to the portlet.

  If the system administrator has not received the six-Monday event data, you cannot display the Roku.

- Weather forecast:
  Set the region for which you want to view the weather forecast.
  Click the Regional icon that contains the region you want to view, and then select the check box for the region.

2.1.3.17. Presence Information Portlet

This portlet displays the presence information. Confirm or change your presence information.

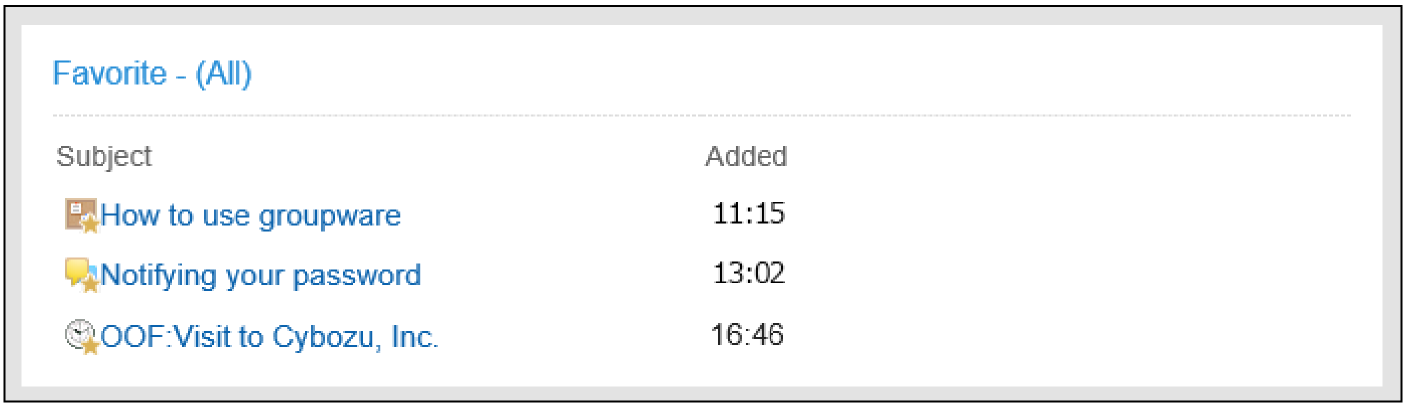


Setting Options for Portlets

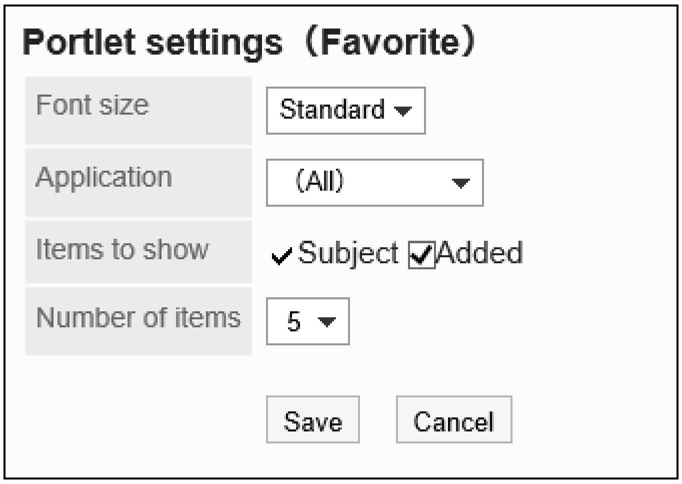
This portlet has no "portlet settings".

2.1.3.18. Favorite Portlet

Displays a list of applications that you have added to your favorites.



Setting Options for Portlets



- Character Size:

  Select the text size you want to use.

  The following character sizes can be selected:

  - Small
  - Standard
  - Large

- Application:

  The favorites of the selected applications are displayed in the portlet.

  You can select the following applications:

  - (All)
  - Scheduler
  - Messages
  - Bulletin Board
  - Cabinet
  - E-mail
  - MultiReport
  - Space

- Display items

  Select the items to display in the portlet.

  Title cannot be hidden.

  The following items can be selected:

  - Added date and time

- Number of items:
  Select the number of favorites to display in the portlet.
  You can select up to 20 notifications.

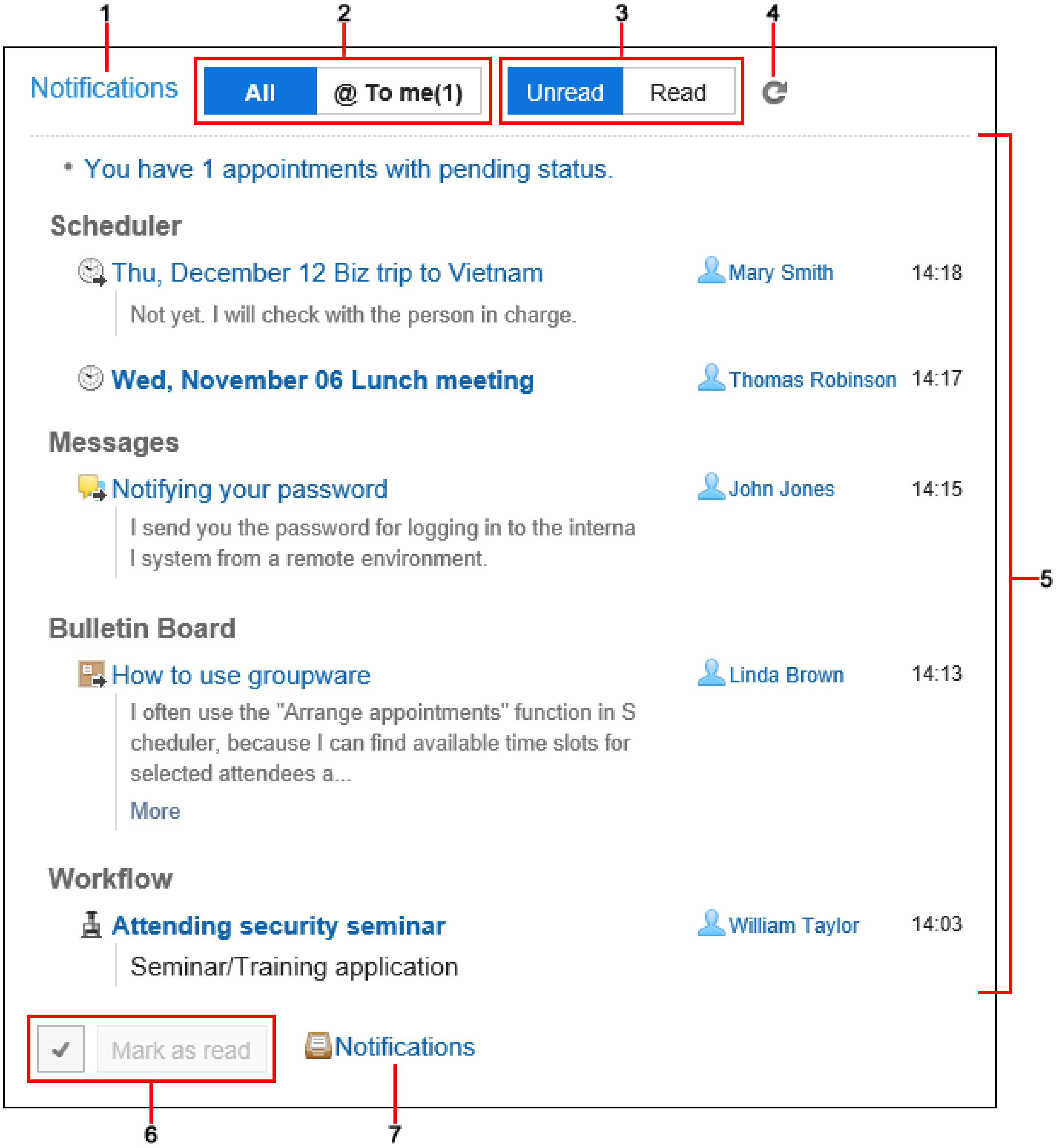
2.1.3.19. Notifications Portlet

You can find the following types of portlets in Notifications.

- Notifications Portlet
- Read Notifications Portlet

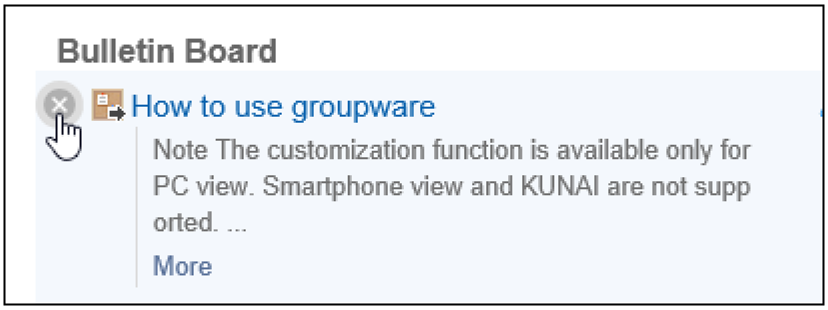
Notifications Portlet

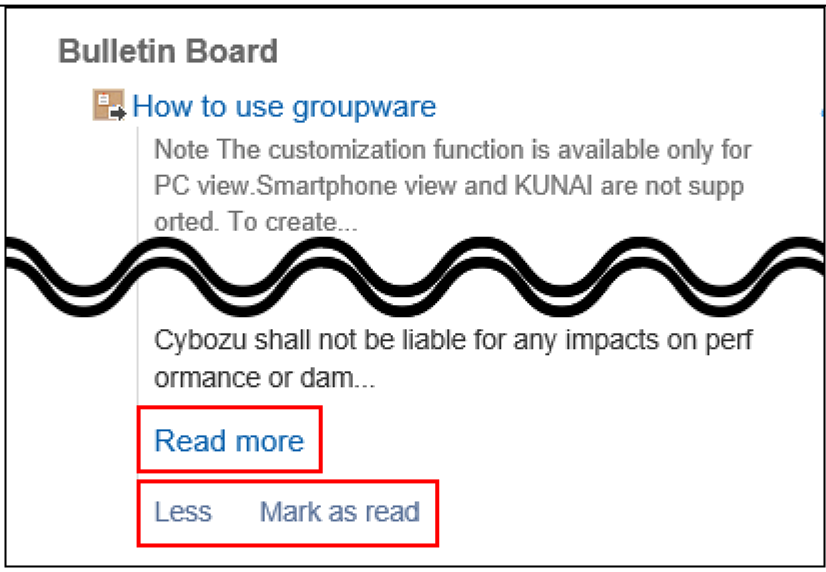
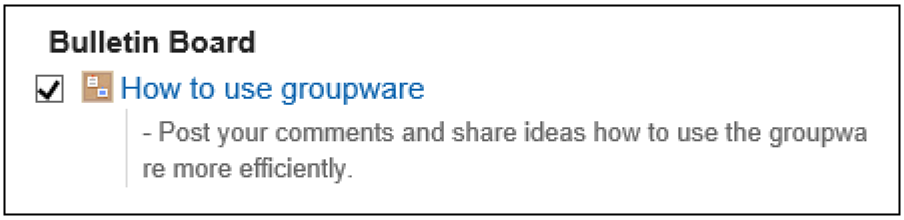
Notifications for each application are displayed in the list.
Not only notifications are categorized by unread and read, but also "All" and "@ To me" tabs can be used to filter notifications in the list.
All tab and "Unread" tab are selected to display notifications by default.
All notifications received prior to version 4.10.0 can be found in the "All" tab.



Description of the items

Number	Description
1	**Portlet:** When the name of the portlet is set in the portlet settings, the set portlet name is displayed. When you click a portlet name, its "Notifications" screen appears.
2	• **"All" tab:** All the notifications are displayed. • **"@ To me" tab:** Notifications addressed to you are displayed. For the details about which notifications are

Number	Description
	treated as "To me" notifications, refer to What are the notifications addressed to me?. If you have unread notifications addressed to you, the number of them is displayed next to "@ To me". If you have 100 unread notifications or more, "99+" is displayed.
3	• **"Unread" tab:** Unread notifications are displayed. • "Read" tab: Notifications that have already been read are displayed.
4	**Refresh button:** Refreshes the screen showing notifications in the current tab up to date. For example, when "@To me" tab is on the screen showing your unread notifications addressed to you, clicking this button refreshes the information on unread notifications.
5	**Update history:** It shows information updates on each application. When you click the title of a notification, you will be navigated to its details screen. Then, the status on the information becomes "Read". You can change the status to be "Read" without moving to the details screen if you move the pointer to the notification and click "Mark as read" on the left.  When you click "More", you can expand the notification to see its details or make its status "Read" without moving to the details screen. The expanded notification can be collapsed by clicking "Less". If the content of the notification is too long to show, "Read more" is displayed at the end of the expanded text. When you click it, you will be navigated to its details screen. Then, the status on the information becomes "Read".

Number	Description
	
6	• **"Select or clear all check boxes" button:** Clicking this button selects all the check boxes on the left of the notifications. When you click the button again, all the check boxes are cleared.  • **"Mark as read" button:** It is enabled when the check boxes for notifications are selected. You can change the status of all the selected notifications to be "Read".
7	**"Notifications" link:** "Notifications" screen appears.

Notifications for the following applications are displayed.

- Space
- Scheduler
- Messages
- Bulletin board
- Cabinet
- Phone Messages
- E-mail
- Workflow
- MultiReport

- External Notifications:
  It shows notifications from external systems that your system administrator has configured.

After you read notifications, their statuses will become "Read" and no longer shown on "Unread" tab.
However, the notifications on workflows and phone messages will remain in "Unread" tab until you do either of the following:

- Workflow: Process requests
- Phone Messages: Check phone messages

`![Portlet settings (notifications) Screen](/g5/img-en/admin_application_portal_type_notification_04. gif)`

- Display order of applications:
  You can configure the display order of applications to show their notifications on the portlet.
- Common settings:
  - Select design:
    Select the display layout of notifications.
    The following items can be selected:
    - Single-line layout:
      Each notification is displayed in one line.
    - Multi-line layout:
      Each notification is displayed in multiple lines.
  - Character size:
    Select the text size you want to use.
    The following character sizes can be selected:
    - Small
    - Standard
    - Large
  - Items:
    Select the items to display in the portlet.
    You cannot hide "Subject".
    The following items can be selected:
    - Contents:
    - Name:
    - Date and time:
- Options for each application
  - Format:
    Select the format to show the data for each application.
    The following items can be selected:

- List:
  A list of notification subjects is displayed.
- Number of notifications:
  The number of notifications is displayed. If you have 100 unread notifications or more, "99+" is displayed.
  If you select this item, "Items" and "Number of items" settings are overridden.

◦ Number of notifications:
When you select "List" for "Format", you select the number of notifications to show on the portlet.
You can select up to 20 notifications.

Note

- You cannot change the position of external notifications in the layout. They are shown below notifications for applications.
- You can configure the default values for the items relating to the display in Notifications portlet on "Application settings" > "Notifications" > "Notifications portlet settings" or "Notifications portlet".
  For details, refer to "Default Settings in "Notifications Portlet"(1614Page).

Notifications you've already read are displayed.

`![Read Notifications Portlet](/g5/img-en/admin_application_portal_type_notification_05. gif)`

`![Portlet settings (read notifications) Screen](/g5/img-en/admin_application_portal_type_notification_06. gif)`

- Character size:
  Select the text size you want to use.
  The following character sizes can be selected:
  - Small
  - Standard
  - Large
- Items:
  Select the items to display in the portlet.
  You cannot hide "Subject".
  The following items can be selected:

  - Space name
  - Contents:
  - Name:
  - Date and time:

- Application:
  The portlet shows read notifications for the selected application.
  You can select the following applications:
  - (All)
  - Scheduler
  - Messages
  - Bulletin board
  - Cabinet
  - Phone Messages
  - E-mail
  - Workflow
  - MultiReport

- Number of notifications:
  Select the number of read notifications that you want to display in the portlet.
  You can select up to 20 notifications.

Note

- You can configure the default values for the items relating to the display in Read notifications portlet on "Application settings" > "Notifications" > "Read Notifications Portlet".
  For details, refer to Default Settings in "Read notifications" Portlet(1616Page).

2.1.3.20. HTML Portlet

This portlet is created in HTML.

The following HTML portlets are displayed

- HTML portlets created by system administrators
  If your system administrator creates an HTML portlet, refer to Configuring the HTML portlet(692Page).
- User-created HTML portlets
  The user-created HTML portlet is displayed only in the Portlet list on the "My Portal Details" screen in the personal settings.
  If you want to create an HTML portlet in your personal settings, refer to Setting up the HTML portlet in the user help.

Setting Options for Portlets

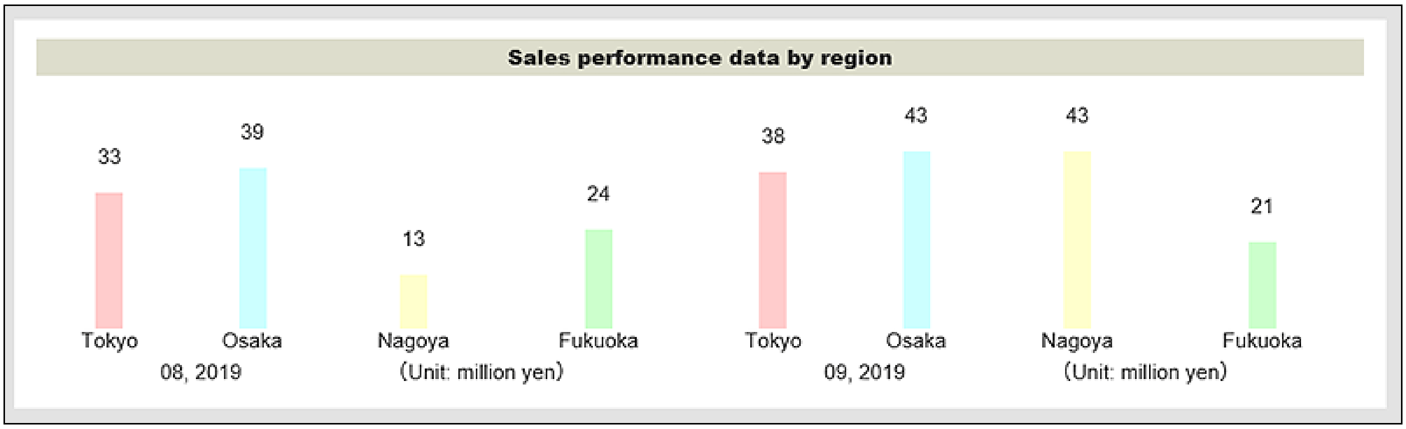
This portlet has no portlet settings.

2.1.3.21. PHP Portlets

This portlet is created by writing a PHP script.

The PHP Portlet is created by your system administrator.

For details, refer to PHP portlet settings(700Page).



Setting Options for Portlets

This portlet has no "portlet settings".

2.2. Space

Space is an application that allows the members from different organizations collaborate on projects.
It helps to consolidate discussions, shared To-Dos, and attachments to clarify "who" should do "what" by "when" to achieve the goals.
System administrator and the application administrators can set initial values of the way to make space public, and set categories.
You can limit the attachment file size in General Settings for Files(233Page).

Users who can manage spaces

The following users can manage spaces:

- System administrators:
  Users who belong to Administrators role.
- Space application administrators:
  Users who are granted the administrative privileges to manage spaces from the system administrator.
  You can do the same tasks as the system administrator on the spaces.
- Space Administrators:
  Member of the space who are granted the administrative privileges.
  If you do not set space administrators, all members of the space become space administrators.

The actions available on spaces for each type of administrator are as follows:

Action	System administrators Space application administrators	Space administrators
Setting categories	✔	
Viewing private spaces	✔	
Editing spaces	✔	✔
Editing memo in spaces	✔	✔
Moving spaces	✔	✔
Deleting spaces	✔	✔
Deleting spaces in bulk	✔	
Adding folders	✔	✔

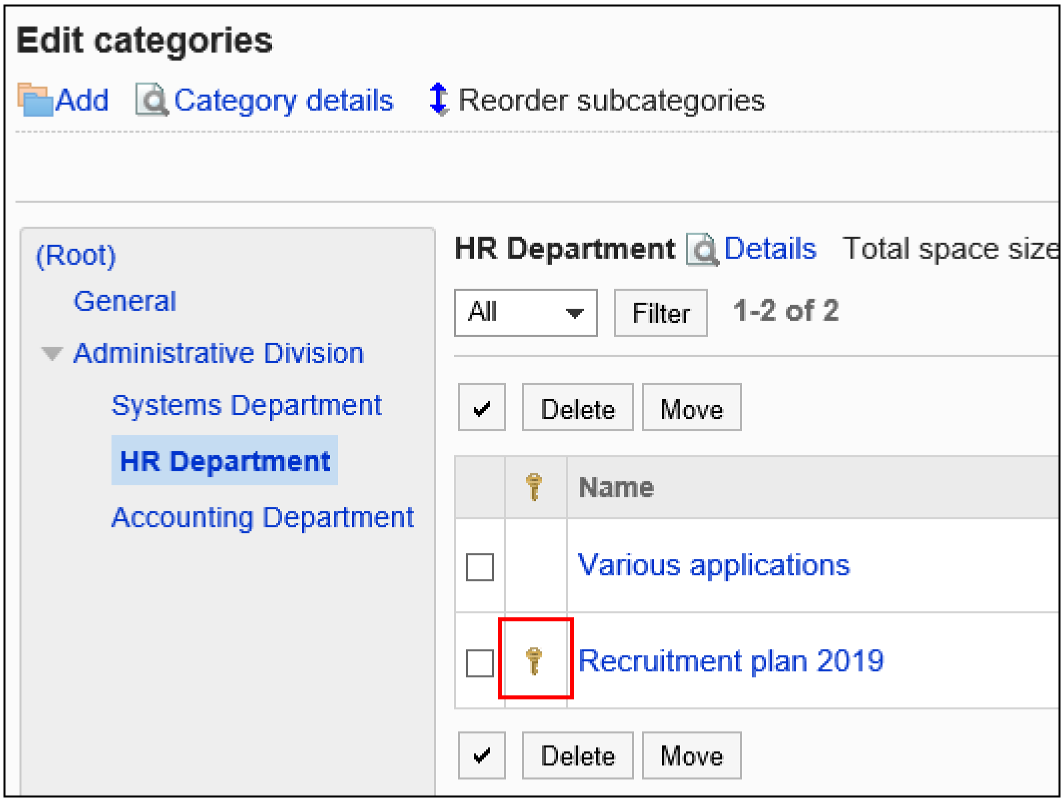
Action	System administrators Space application administrators	Space administrators
Editing folders	✓	✓
Deleting folders	Can only delete a folder that does not contain any discussions.	Can only delete a folder that does not contain any discussions.
Add discussions	✓	✓
Editing discussions	✓	✓
Moving discussions	Can move discussions only within the same space.	Can move discussions within the space you manage, and to another space of which you are a member.
Deleting discussions	✓	✓
Editing shared To-Dos	✓	✓
Deleting shared To-Dos	✓	✓
Deleting comments	✓	
Deleting attachments	✓	

Caution

- **When you change the space information**
  If you change public space to private, discussions followed by users other than members of the group are unfollowed. If you change it to public again, they are still unfollowed.
  Users who are not members must follow the discussions again.

Note

- Spaces appear with icons on "Space" in "Setting categories" screen of "Application settings" are private spaces.
  Only system administrators, space application administrators, and members of the spaces can view them.

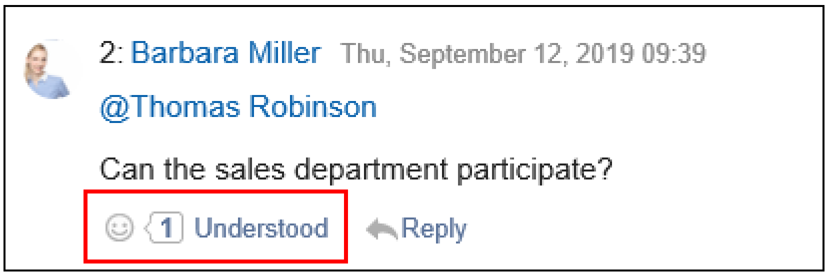


- In Mobile view, all users including system administrators cannot delete other users' comments.

Using Respond Feature

By using the respond feature, you can make a quick response to the message content or any comments.

Users can show their intention by clicking a link such as "Like" and "Acknowledged" without posting any comment.



The following settings can be configured on the "Management" page in the system administration:

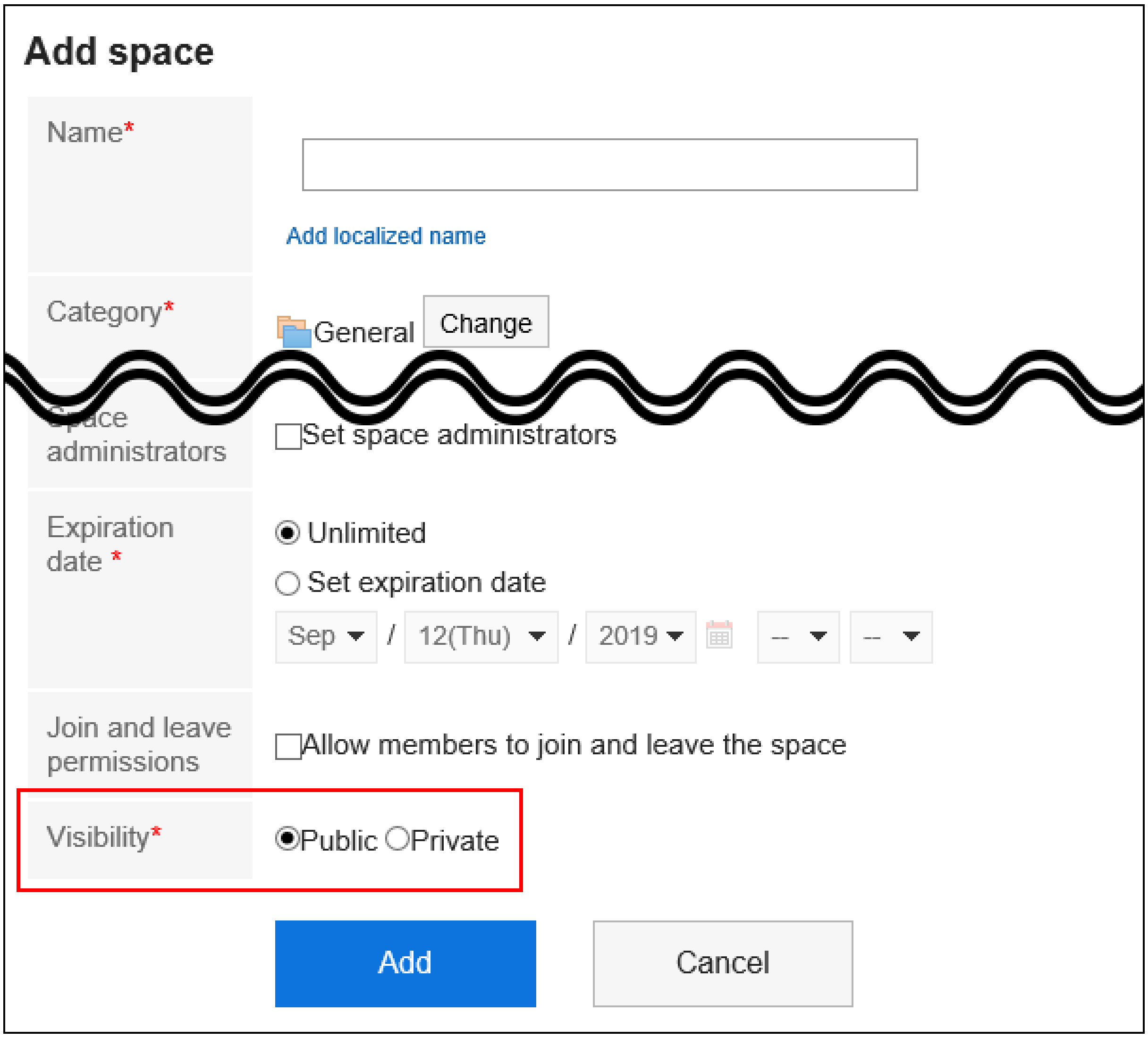
- Activating or deactivating the respond feature:
  For details, refer to the "Using Applications(206Page)" section.
- Changing the label of "Like":
  For details, refer to Respond(1647Page).

2.2.1. General Settings for Spaces

On "General settings" screen of spaces, you can set basic functions of spaces.

Setting Default Visibility

Set the default value of "Visibility" on the "Add space" page.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Space".**

5. **Click "General Settings".**

6. **In "Default visibility" field on "General settings" screen, select either public or private.**

7. **Confirm your settings and click "Save".**

Not Allowing Unlimited Expiration Date Settings

Set whether to allow the space to remain for an unlimited time.
By default, allowing to specify unlimited expiration date is selected.
If your system administrator does not allow this setting, users will not be able to set the expiration date to "Unlimited" for its expiration date on the screen to create spaces, "Editing spaces" screen, or the screen to reuse spaces.

- If you do not allow the "Unlimited" expiration date

- If you allow the "Unlimited" expiration date

Not allowing "Unlimited" expiration date helps to control unnecessary usage of disk spaces causing by spaces left unused.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Space".**

5. **Click "General Settings".**

6. On "General settings" screen, clear the "Allow" check box in "Unlimited setting for expiration date" field.

To allow unlimited expiration date, select the "Allow" check box.

7. Confirm your settings and click "Save".

Setting Default Expiration Date

Set the default value for the "Expiration date" in "Add space" screen.

If you set a default value to it, save users from setting them.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Space".

5. Click "General Settings".

6. In "Default value for expiration date" field on "General settings" screen, set a default expiration date.

You can select one of the following options: By default, "Unlimited" is selected.

- Unlimited:
  You can select "Unlimited" expiration date only if your system administrator allowed to set it.
- Set the number of days for expiration date:
  Set a default value for expiration date as number of days from the current date.
  Enter a positive integer value from 0 to 10000.
  If you set it to "0", the default expiration date will be the current date.

7. Confirm your settings and click "Save".

2.2.2. Setting Categories

Set categories and manage spaces.

For example, if you create categories by project, you can organize spaces related to projects into categories.

Categories can be layered.

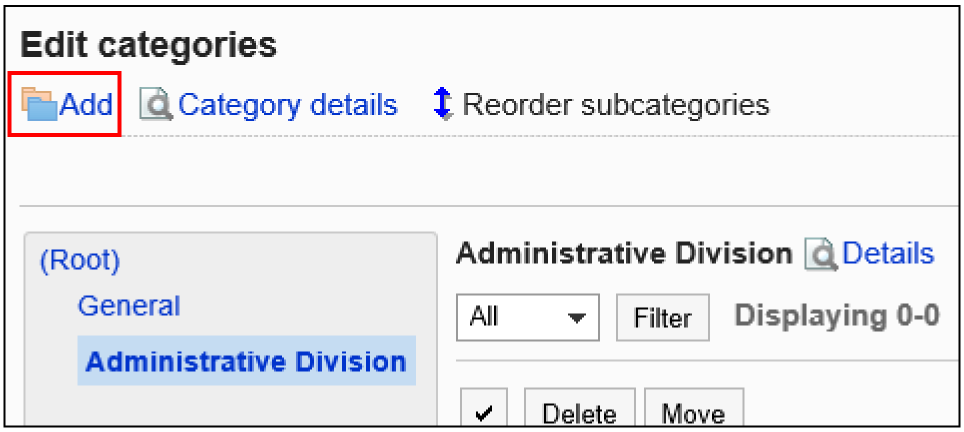
Only system administrators and space application administrators can create categories.

Adding Categories

Add categories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Space".**
5. **Click "Setting categories".**
6. **On "Setting categories" screen, select a parent category, and then click "Add".**



7. **On the "Add Categories" screen, enter the "Subject" field.**

   This is a required field.

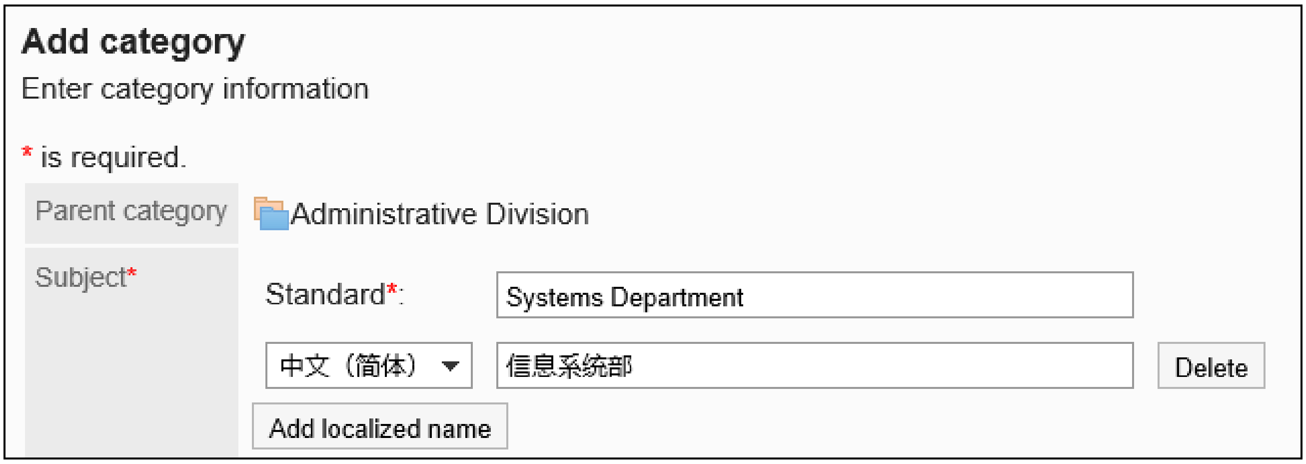
   Clicking "Add localized name" allows you to set subjects in multiple languages.

   If you do not set the subject in the user preference language, the default subject is displayed.

   The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese

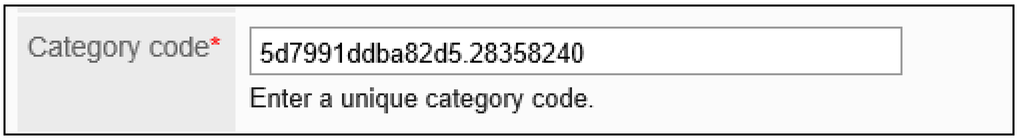
  Displayed in Traditional Chinese.



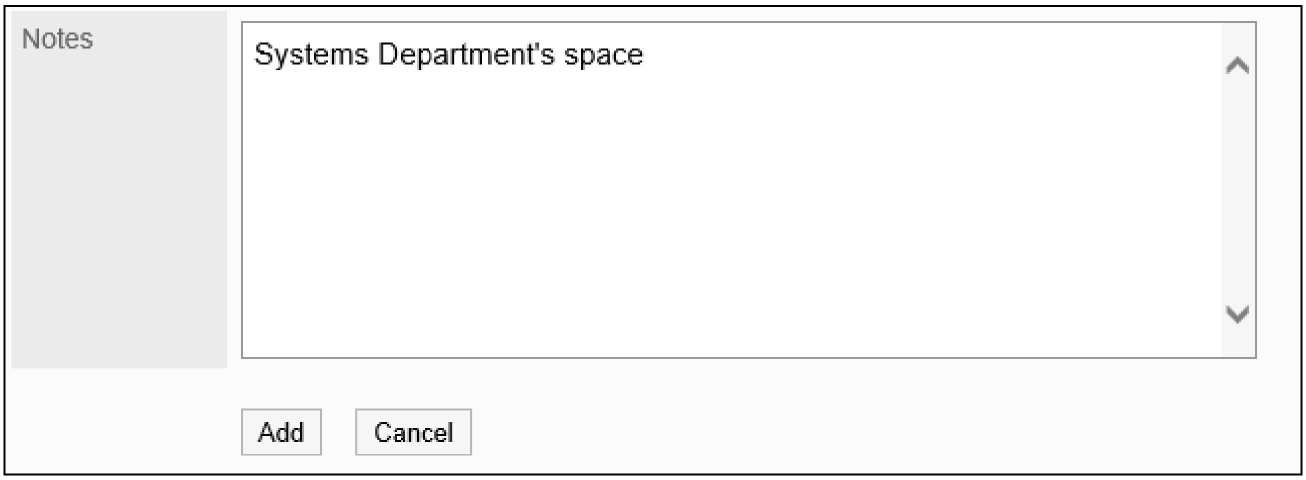
8. **Set the Category Code field.**

You should set the category code.

This is a unique code for identifying categories.



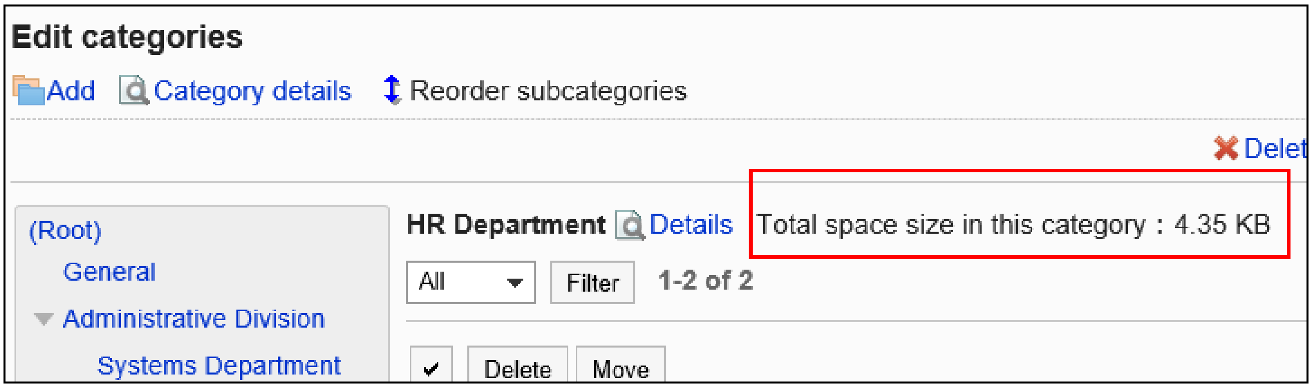
9. **Set the Notes field as needed.**



10. **Confirm your settings and click "Add".**

Note

- The amount of data shown above the category settings screen is the total data used in spaces, discussions, shared to-dos, comments, and attachments in the selected category.



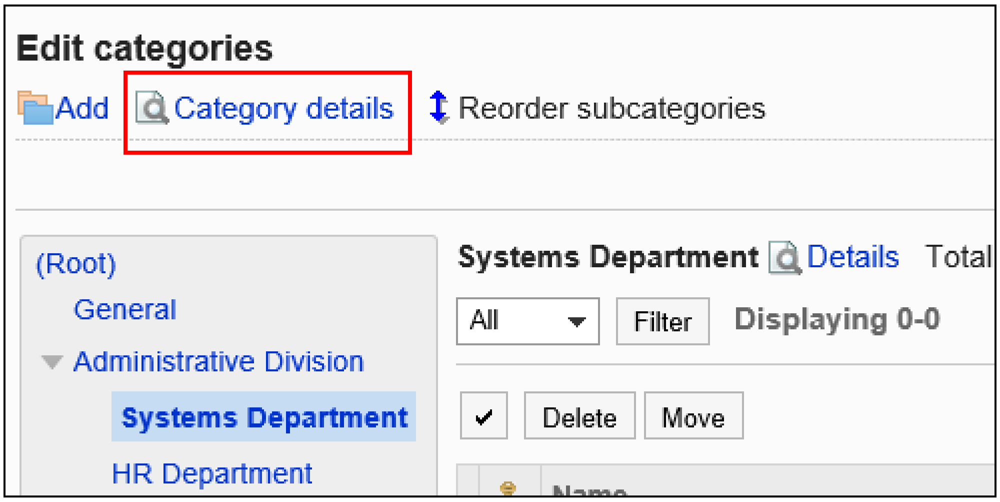
Changing Categories

Change categories.

You cannot change "root".

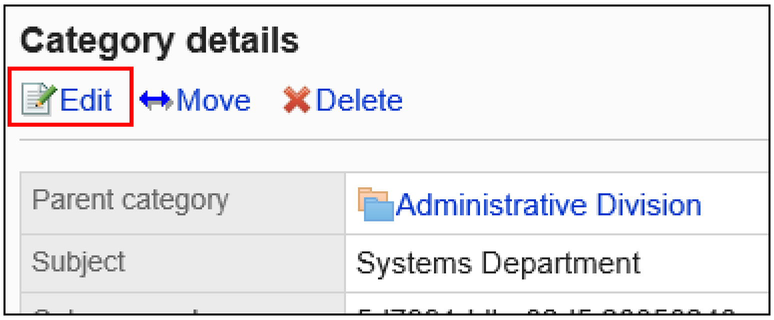
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Space".**
5. **Click "Setting categories".**
6. **On "Setting categories" screen, select the category to change, and then click the item for category details.**



When you click "Details" to the right of the category name, the category details page is displayed.

7. **On the screen for category details, click "Save".**



8. **On the screen to change categories, set the necessary items.**

9. **Confirm your settings and click "Save".**

Moving Categories

Move the subcategory to another category.

You cannot move "root".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

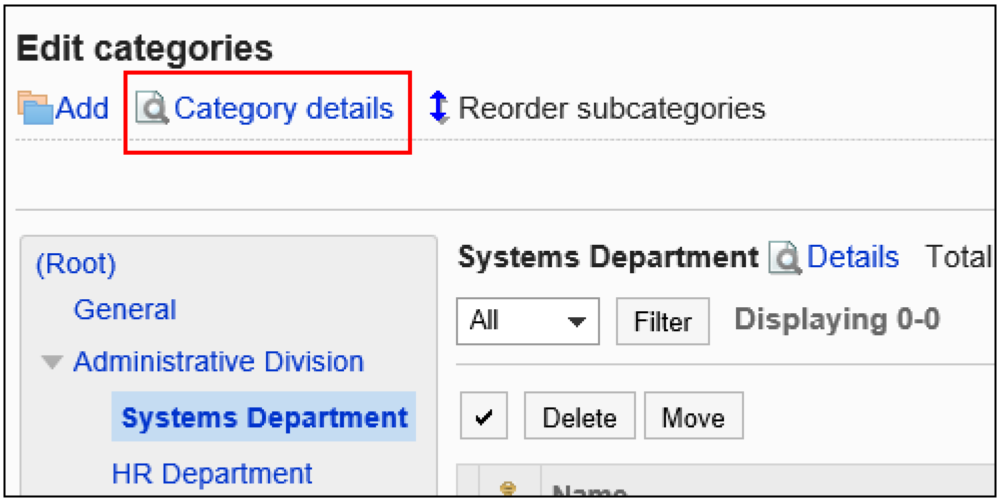
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Space".**

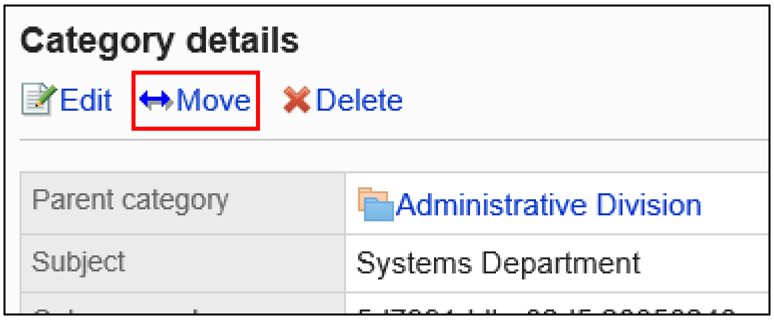
5. **Click "Setting categories".**

6. **On "Setting categories" screen, select the category to move, and then click the item for category details.**



When you click "Details" to the right of the category name, the category details page is displayed.

7. **On the screen for category details, click "Move".**

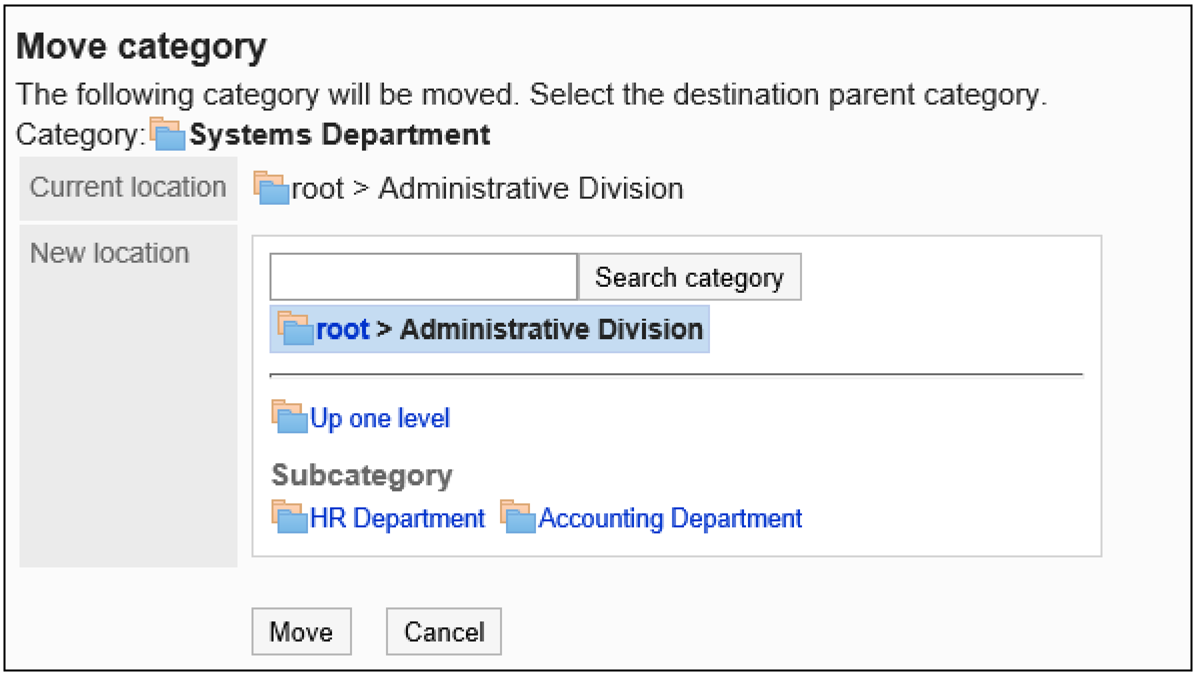


8. **On the screen to move categories, select the destination category.**

Clicking "Move up" moves the category up one level.

Clicking on a category name moves you to the parent category of the category you clicked.

You can search for categories to move categories into by entering keywords and clicking "Category search".



9. Confirm your settings and click "Move".

Reordering Subcategories

Reorder subcategories in a category.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

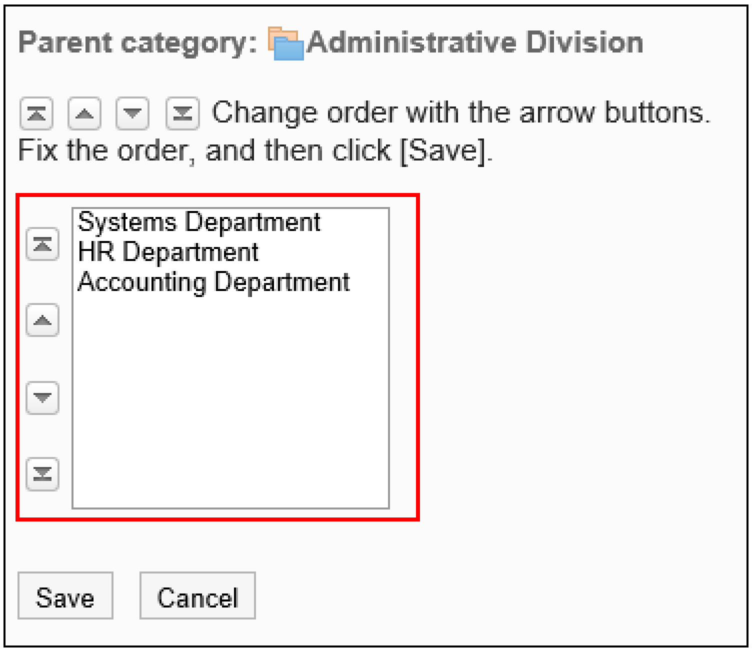
3. Select "Application settings" tab.

4. Click "Space".

5. Click "Setting categories".

6. On "Setting categories" screen, select a category to reorder its subcategories, and then click the item to reorder subcategories.

7. **On the screen to reorder subcategories, reorder subcategories.**



8. **Confirm your settings and click "Save".**

Deleting Categories

Delete empty categories.

You cannot delete categories that include spaces or subcategories and "root".

Caution

- Deleted categories cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

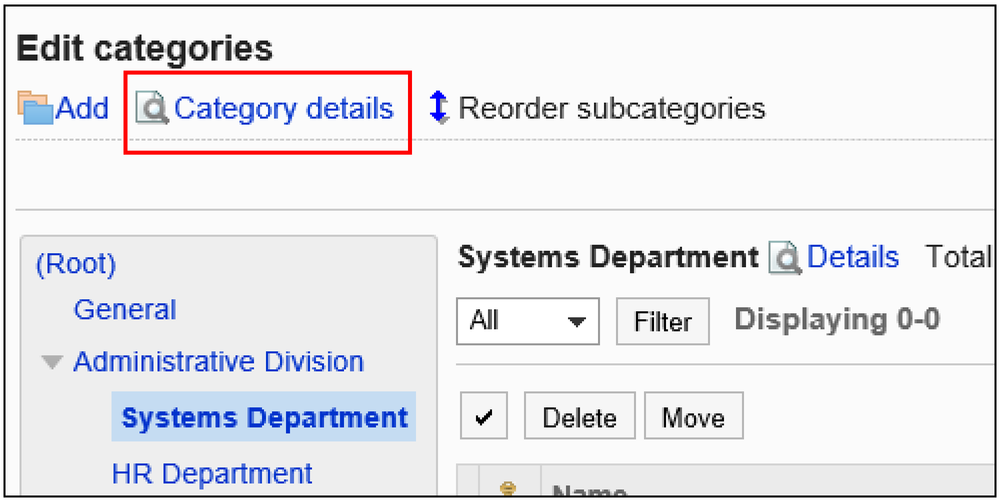
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Space".**

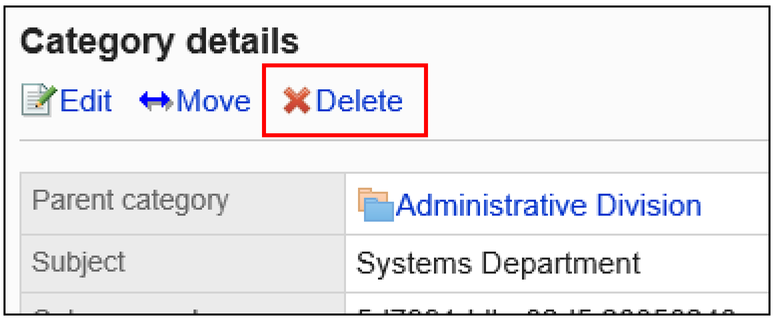
5. **Click "Setting categories".**

6. **On "Setting categories" screen, select the category to delete, and then click the item for category details.**



When you click "Details" to the right of the category name, the category details page is displayed.

7. **On the screen for category details, click "Delete".**



8. **Click "Yes" on the page to delete categories.**

2.2.3. Managing Categories Using CSV Files

Manages category data using CSV files.

The following data can be managed using CSV files:

- Category
- Category names

Importing Data from a CSV File

Import space category data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on CSV files, refer to Spaces(1828Page) CSV format for spaces.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Space".**

6. **Click "Import from CSV file".**

7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the required items for the data to import, and then click "Next".**

   The setting fields are as follows:

   - Character encoding:

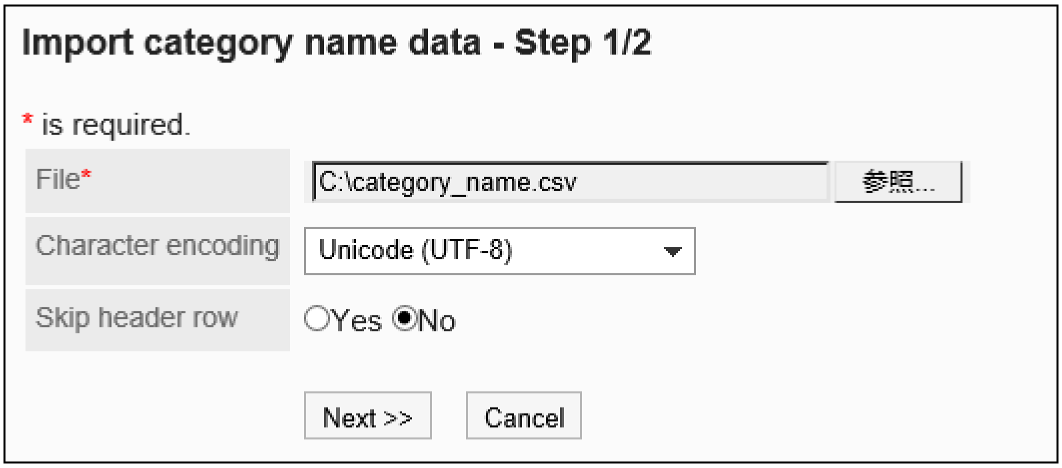
     Encodes data from a CSV file with the selected character code.

     The following character encoding can be selected:

     - Unicode (UTF-8)
     - Japanese (Shift-JIS)

- ASCII
- Latin1 (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)

- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



10. Confirm the CSV file contents and click Import.

Exporting Data to a CSV File

Export space category data to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Space".

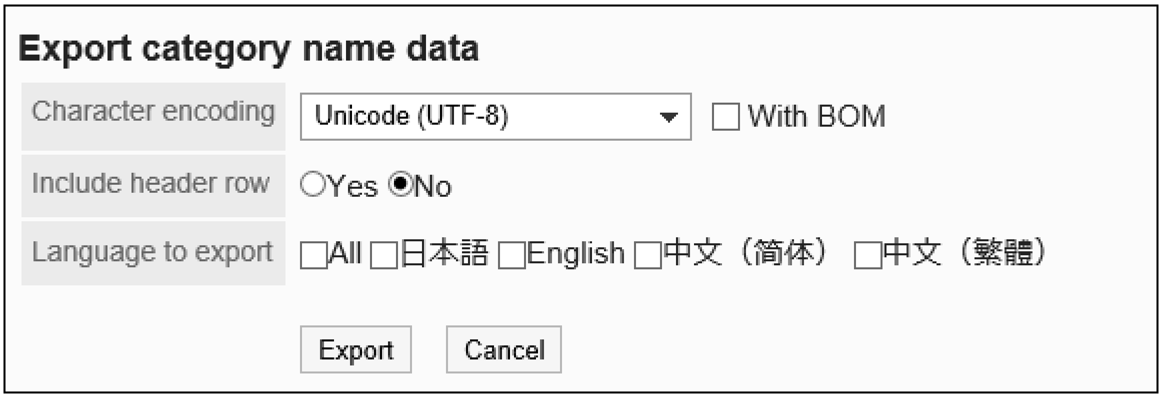
5. Click "Export to CSV file".

6. On the "Export to CSV File" screen, select the data to export.

7. Set the required items for the the data to export.

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  Following character codes can be selected.
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".
- Language in which the data is exported:
  This item is used when exporting category names.
  Set the language in which you export category names. You can set multiple languages.
  The following languages can be selected:
  - All
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese
    Exported in Traditional Chinese.



8. Confirm your settings and click "Export".

9. Save the file with a function provided by your Web browser.

2.2.4. Managing Spaces

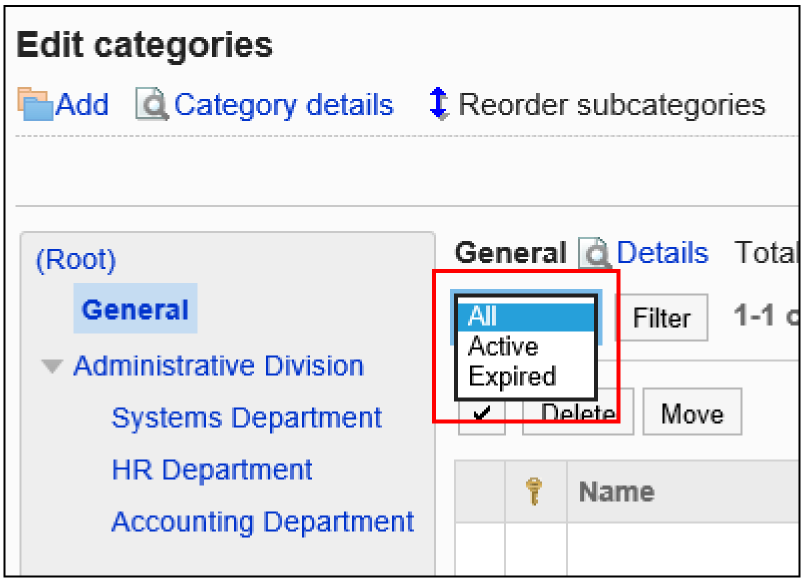
This section describes how to change, move, and delete spaces on the system administration screen.

Moving Spaces

Move spaces to another category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Space".**
5. **Click "Setting categories".**
6. **On "Setting categories" screen, select a category, then select a status for spaces from the drop-down list, and click "Filter".**
   The status of spaces displayed in the drop-down list is as follows:
   - All
   - Active
   - Expired



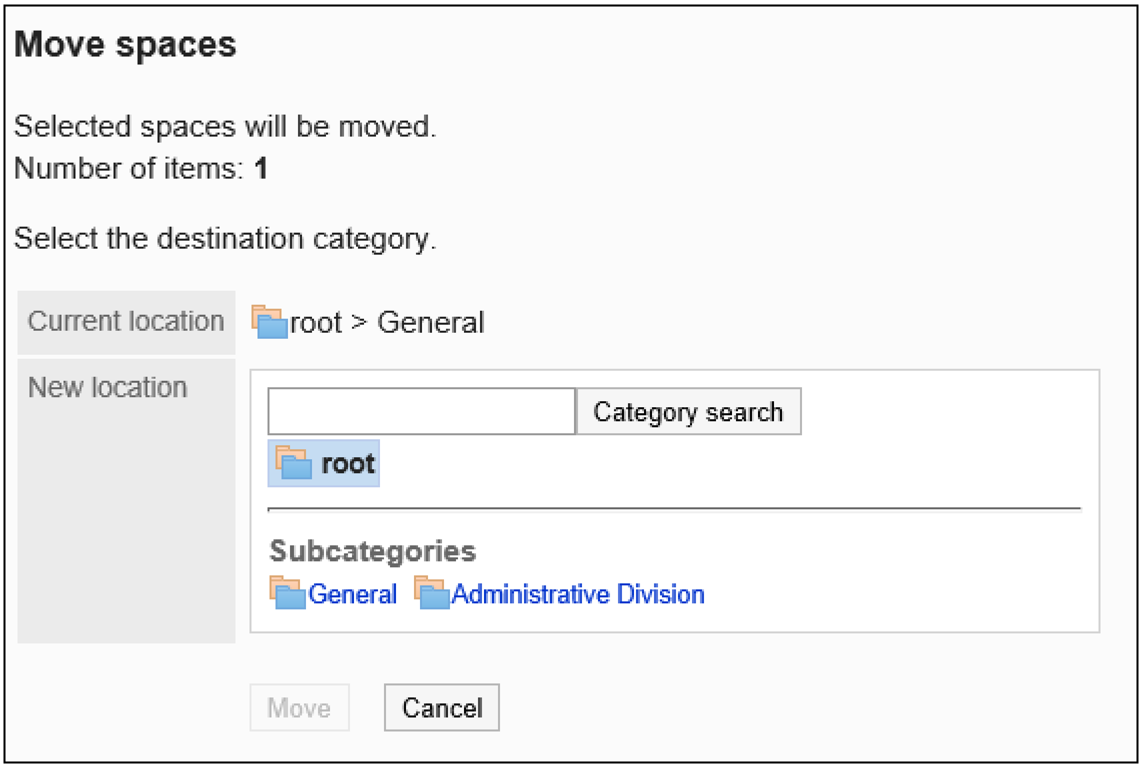
7. Select the check boxes of the spaces to move, and click "Move".

8. In the field specify the category to move into on the screen to move spaces in bulk, select a category.

Clicking "Move up" moves the category up one level.

Clicking on a category name moves you to the subcategory of the category you clicked.

You can search for categories to move categories into by entering keywords and clicking "Category search".



9. Confirm your settings and click "Move".

Deleting Spaces

Delete spaces.

Deleting spaces also deletes all data in the spaces such as discussions, to-dos, and attachments.

Caution

- Deleted data cannot be restored.
  You should check that deleting them doesn't cause problems in your operations before deleting them.

- **If the space has any administrators:**
  The space can be deleted by the system administrators, the application administrators for the space, and the space administrators.
- **If the space does not have any administrators:**
  The space can be deleted by all members of the space, the system administrators, and the application administrators for the space.

This section describes how to delete spaces from the system administration screen. You can delete multiple spaces at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

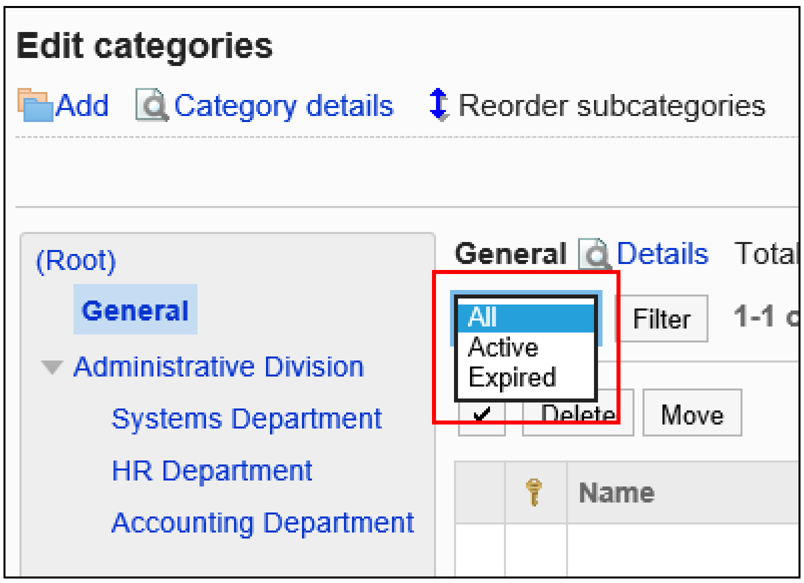
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Space".**

5. **Click "Setting categories".**

6. **On "Setting categories" screen, select a category, then select a status for spaces from the drop-down list, and click "Filter".**
   The status of spaces displayed in the drop-down list is as follows:
   - All
   - Active
   - Expired



7. **Select the check boxes for spaces to delete, and then click "Delete".**

8. **Click "Yes" on "Deleting spaces in bulk" screen.**

Note

- You can also delete spaces clicking "Delete" on the space details screen of the user interface.
  For details, refer to Deleting Spaces.

Deleting Expired Spaces in Bulk

This section describes how to delete expired spaces that expired before a date by specifying the expiration date in the system administration screen.

Caution

- Deleted data cannot be restored.
  You should check that deleting them doesn't cause problems in your operations before deleting them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

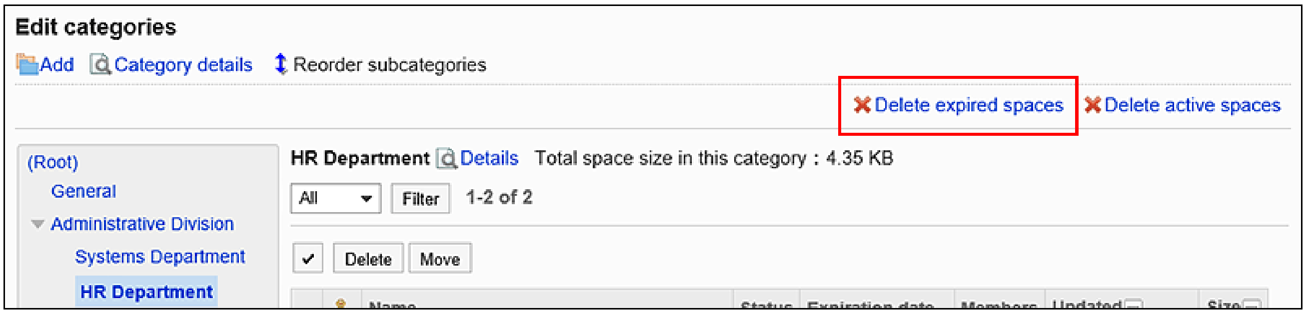
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Space".**

5. **Click "Setting categories".**

6. **On "Setting categories" screen, select a category, and then click "Delete expired spaces".**



7. On "Delete expired spaces" screen, set the date to delete, and then click "Delete".

Default date is one year before the date of the operation.

8. Click "Yes" on "Delete expired spaces" screen.

Deleting Active Spaces Without Any Updates in Bulk

This section describes how to delete all expired spaces that have not been updated after a date by specifying the date in the system administration screen. Expired spaces will not be deleted in this operation.

Caution

- Deleted data cannot be restored.
  You should check that deleting them doesn't cause problems in your operations before deleting them.

Steps:

1. Click the administration menu icon (gear icon) in the header.

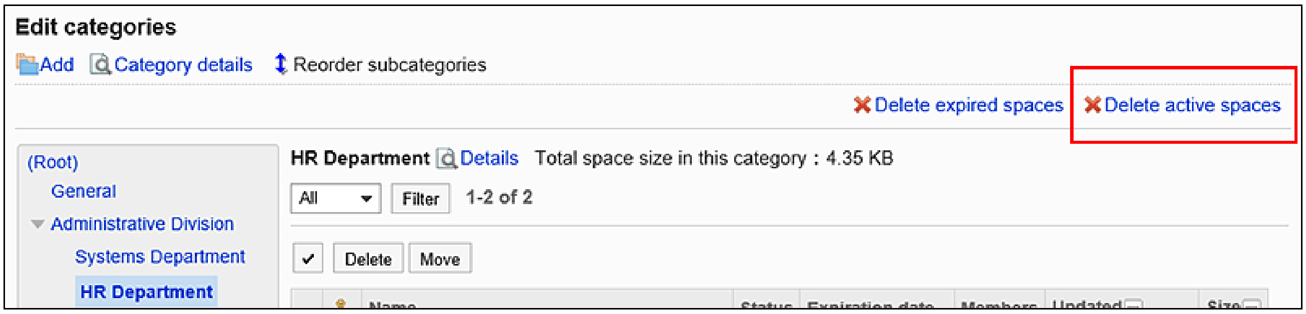
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Space".

5. Click "Setting categories".

6. On "Setting categories" screen, select a category, and then click "Delete active spaces".



7. **On "Delete active spaces" screen, set the day from which to delete spaces, and then click "Delete".**

Default date is one year before the date of the operation.

8. **Click "Yes" on "Delete active spaces" screen.**

2.3. Bookmarks

"Link Collection" is an application for easy access to the URL of a Web site that you frequently use.

Link collection has two types of links

- Shared links

  Links that are available to all users. Set by your system administrator.
- Personal links

  Only users who have registered are allowed to use the personal links.

The administrator help describes the settings for shared links in the System Settings screen.

References

- General Settings for links(799Page)
- Shared category settings(800Page)
- Setting operational administrative privileges for shared categories(807Page)
- Setting permissions for shared categories(813Page)
- Setting Up Shared Links(820Page)

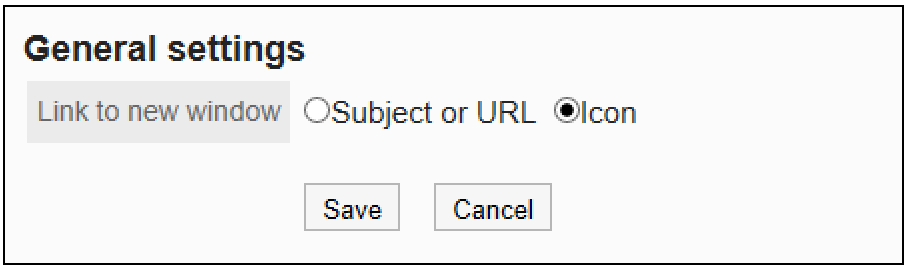
• Setting up personal links

2.3.1. General Settings for Bookmarks

On the "General Settings" page of links, you can set basic functions for links.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Links".**
5. **Click "General Settings".**
6. **On the "General Settings" screen, select the target for which you want to open the destination window.**
   If you click the title of a link, or when you click the icon, the window where the link is displayed is different.
   For links within a shared category, you can set whether to display the linked screens in a separate window if you click a link title or icon.
   The following can be set.
   - Title:
     When you click the title or URL, the destination is displayed in a new window.
     When you click the icon to the right of the title, the destination is displayed in the same window.
   - Icon:
     When you click the icon to the right of the title, the destination is displayed in a new window.
     When you click the title or URL, the destination is displayed in the same window.



7. **Confirm your settings and click "Save".**

2.3.2. Shared Category Settings

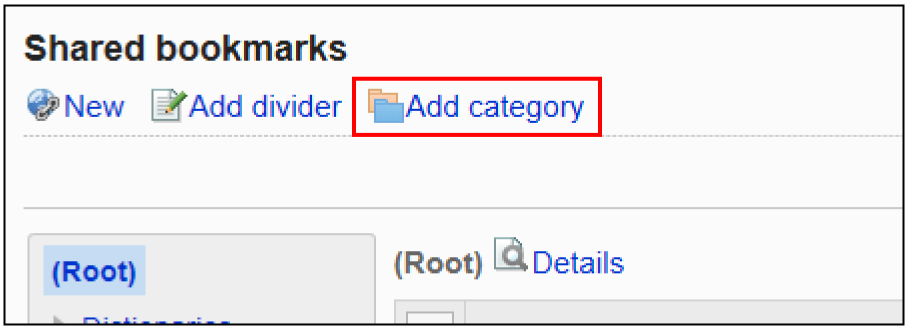
Set up a shared category.

Adding Shared Categories

Adds a shared category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Links".**
5. **Click "Shared Links".**
6. **On the "Shared Links" screen, select a parent category, and then click "Add Shared Category".**



7. **On the "Add shared Categories" screen, enter a title.**

This is a required field.

Clicking "Add localized name" allows you to set subjects in multiple languages.

If you do not set the language title that is set by the user, the "standard" title is displayed.

The following languages can be set:

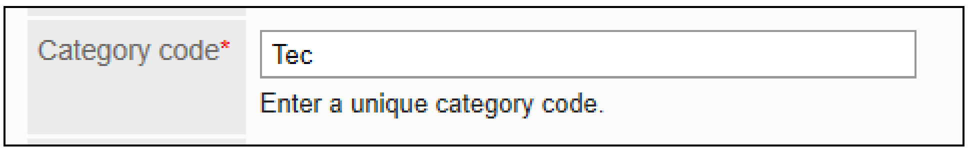
- 日本語
- English
- Simplified Chinese
- Traditional Chinese

  Displayed in Traditional Chinese.

8. **Enter the category code in the Category Code field.**

You should set the category code.

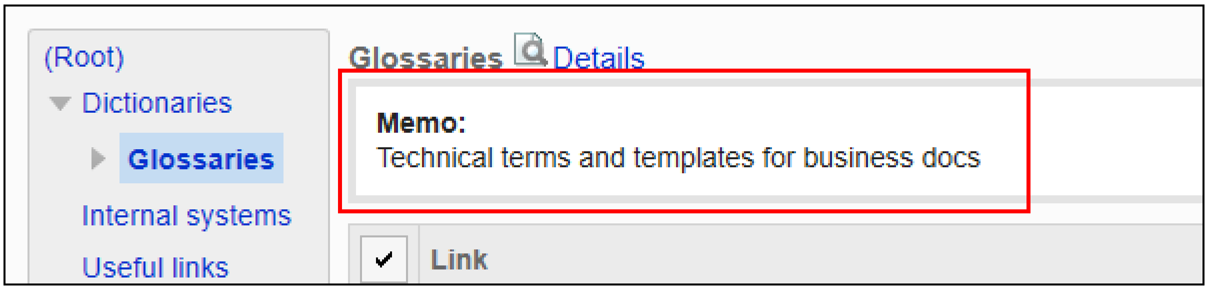
Unique code for identifying shared categories.



9. **Set the Notes field as necessary.**

Enter a description of the category.

When set, notes are displayed on the screen of the shared category that you have set.



10. **Confirm your settings and click "Add".**

Changing Shared Categories

Change the shared category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

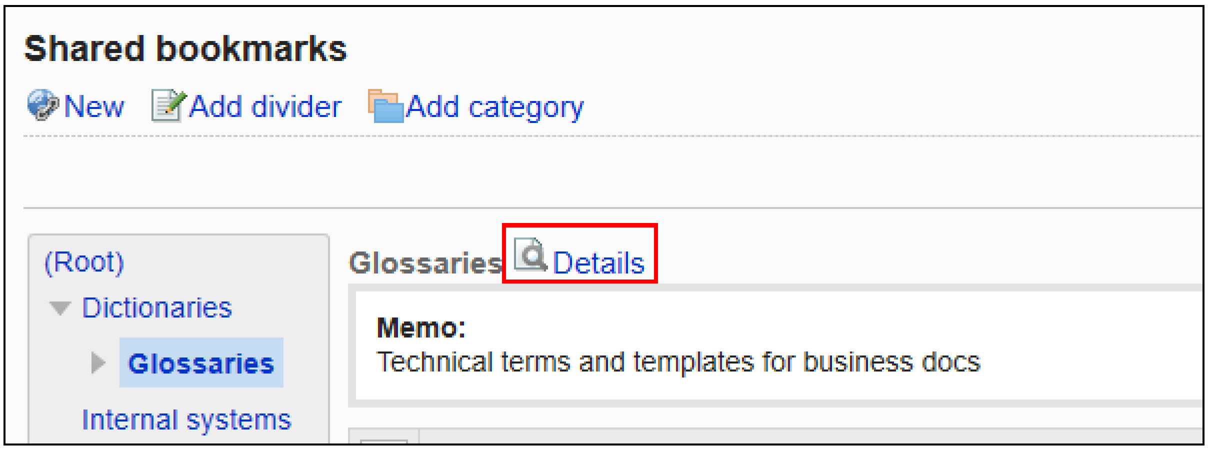
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Links".**

5. **Click "Shared Links".**

6. **On the "Shared Links" screen, select a shared category and click "Details".**



7. **On the "Shared category Details" screen, click "Edit".**

8. **On the "Edit shared category Information" screen, you can change the fields as necessary.**

9. **Confirm your settings and click "Save".**

Moving Shared Categories

Move the shared category.

You cannot move "root".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

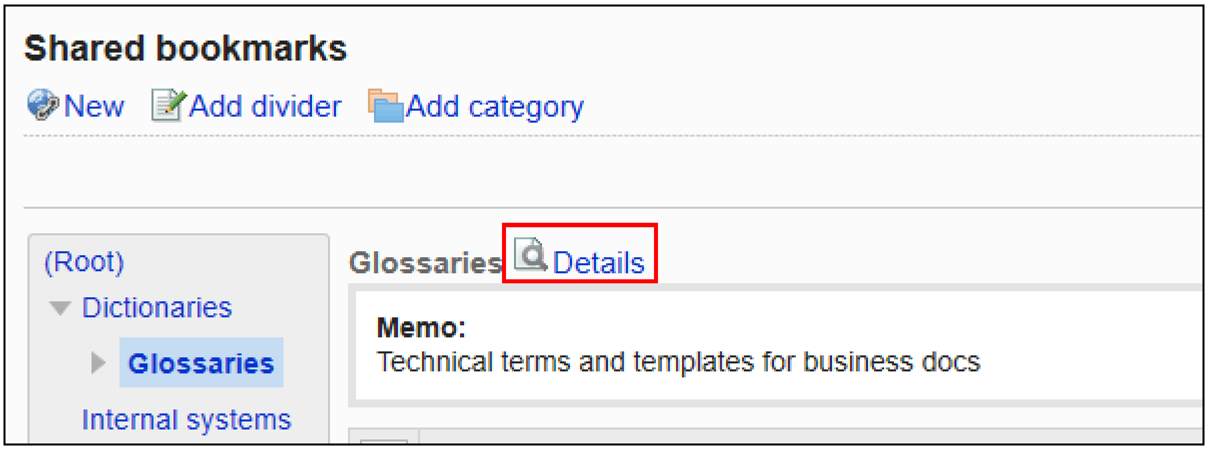
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Links".**

5. **Click "Shared Links".**

6. **On the "Shared Links" screen, select a shared category and click "Details".**



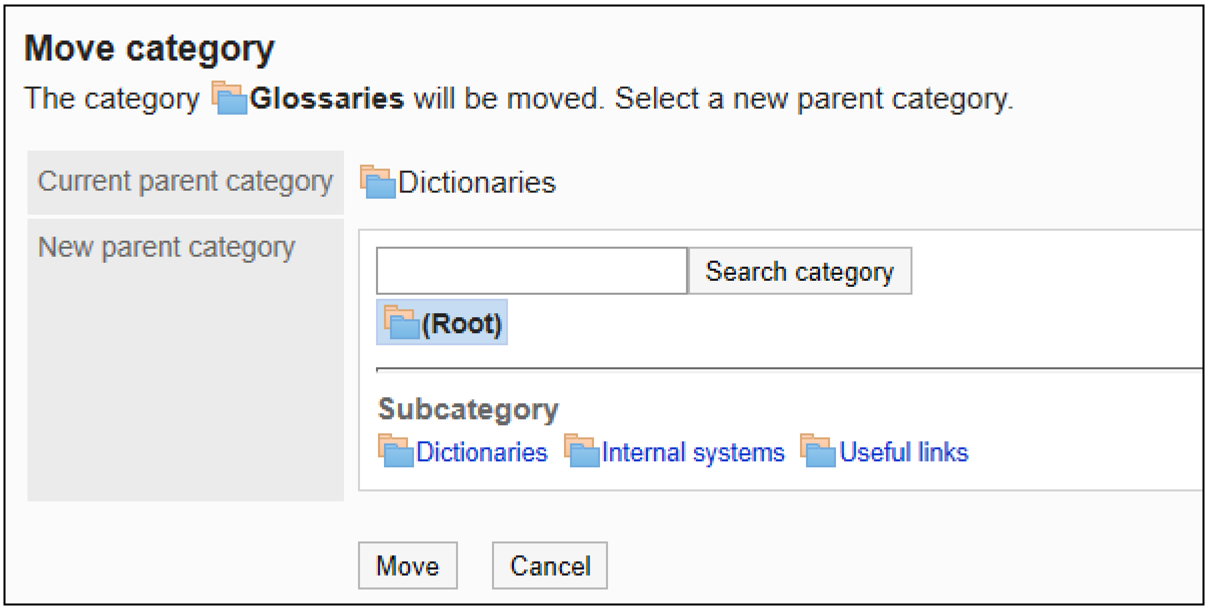
7. **On the "Shared category Details" screen, click "Move".**

8. **On the "Move a shared category" screen, select the "Shared Category" field in the "post-Move parent" category.**

You can search for a shared category by entering keywords and clicking "Search category".

When you click "Up one", you can move up one shared category.

Clicking a shared category name moves it to the subcategory you clicked.



9. **Confirm your settings and click "Move".**

Reordering Subcategories

Reorder subcategories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

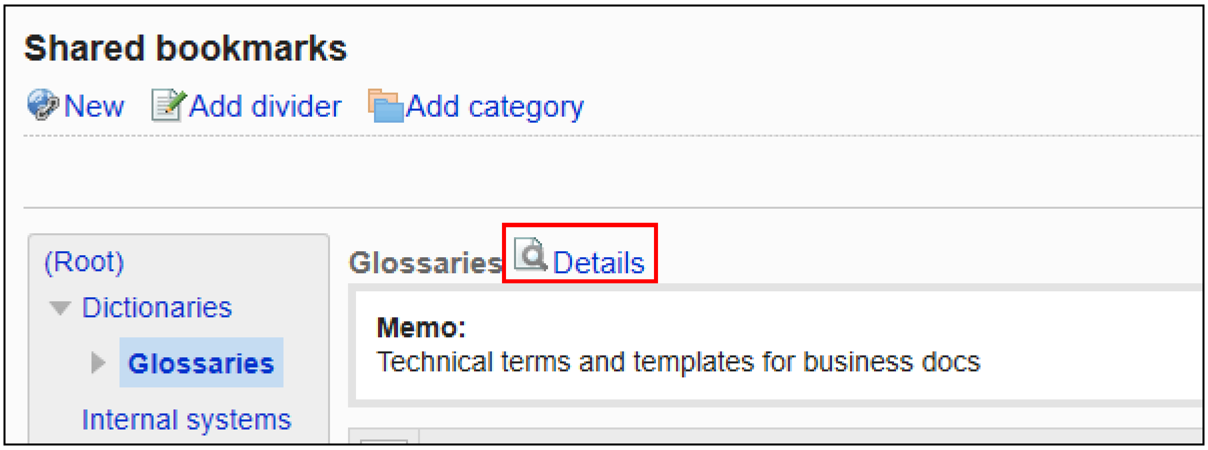
2. **Click "System settings".**

3. **Select "Application settings" tab.**

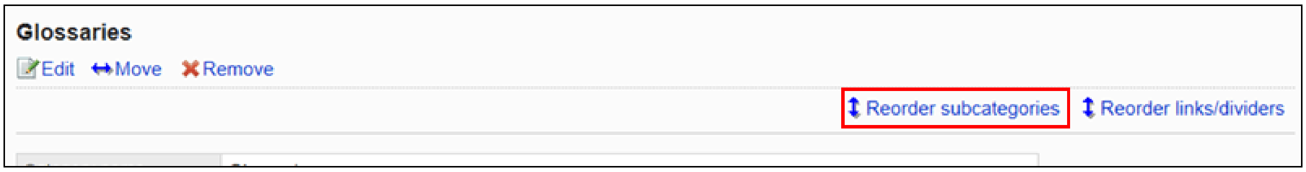
4. **Click "Links".**

5. **Click "Shared Links".**

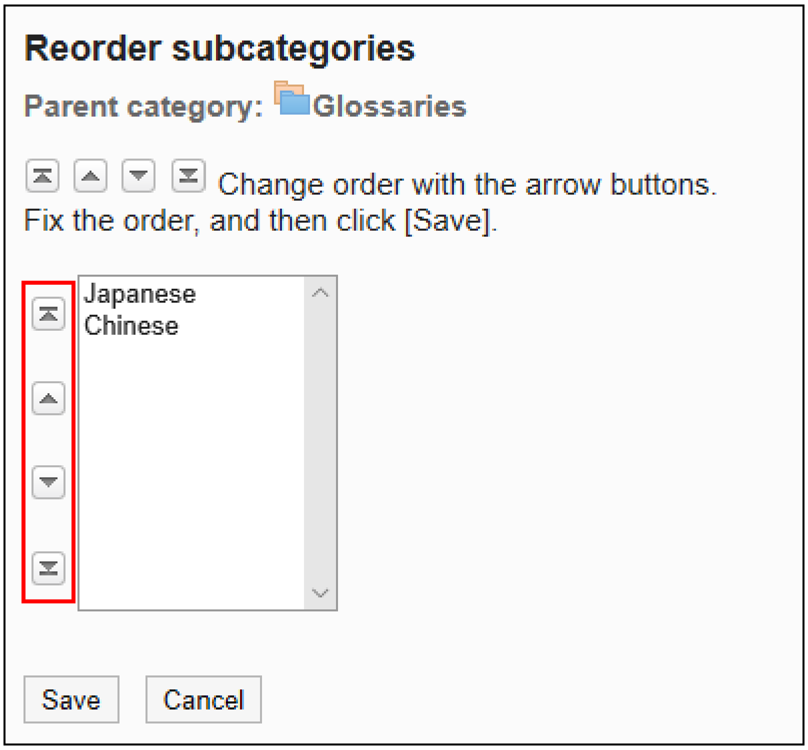
6. **On the "Shared Links" screen, select a shared category and click "Details".**



7. **On the "Shared category Details" screen, click "Reorder Subcategories".**



8. **On the screen to reorder subcategories, reorder subcategories.**



9. Confirm your settings and click "Save".

Deleting Shared Categories

Delete the shared category.

If you delete a shared category, all shared links in the shared category are deleted. Also, the sub-categories and the shared links in subcategories are deleted.

The "root" category cannot be deleted.

You cannot delete a shared category that has a subcategory of 15 or more tiers. Reduce the hierarchy to 14 or less, and delete the category.

Caution

- Deleted shared categories cannot be restored.
- Operational administrators can delete shared categories for which they have been granted the operational administrative privileges. Therefore, the administrators may accidentally delete their subcategories for which they do not have any view privileges in the shared categories.
  Please consult with your system administrators or application administrators if you can delete those shared categories.

Steps:

1. Click the administration menu icon (gear icon) in the header.

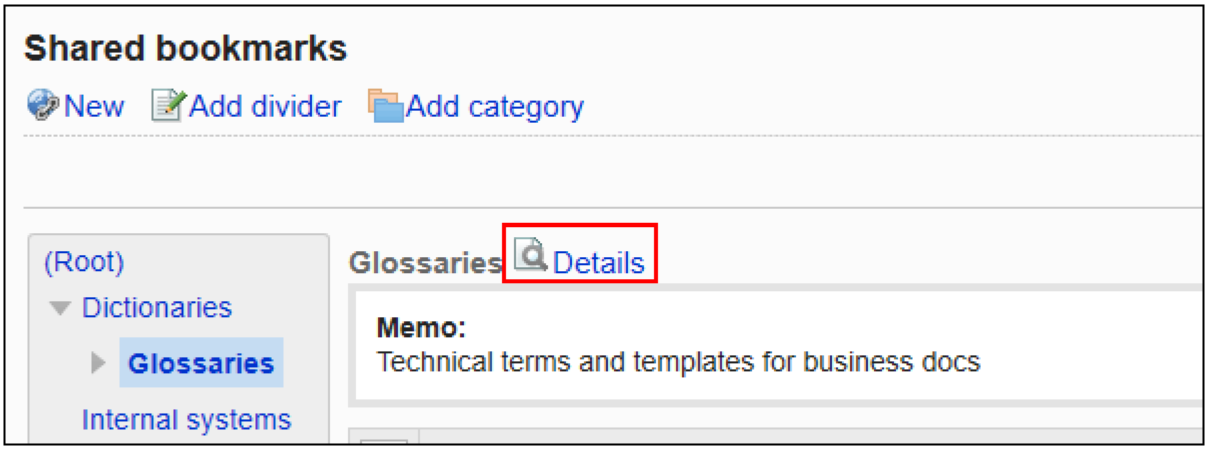
2. Click "System settings".

3. Select "Application settings" tab.

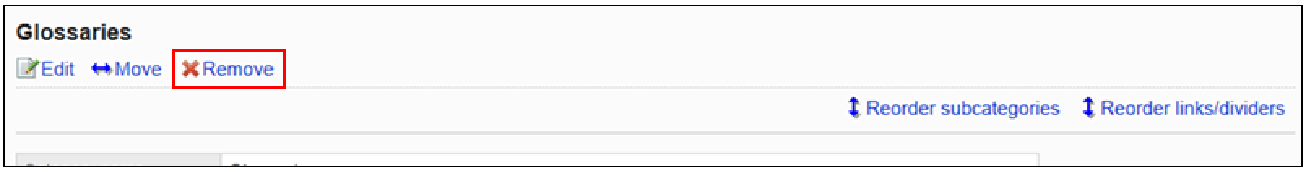
4. Click "Links".

5. Click "Shared Links".

6. On the "Shared Links" screen, select the shared category you want to delete, and click "Details".



7. **On the "Shared category Details" screen, click "Delete".**



8. **Click "Yes" on the "delete shared categories" screen.**

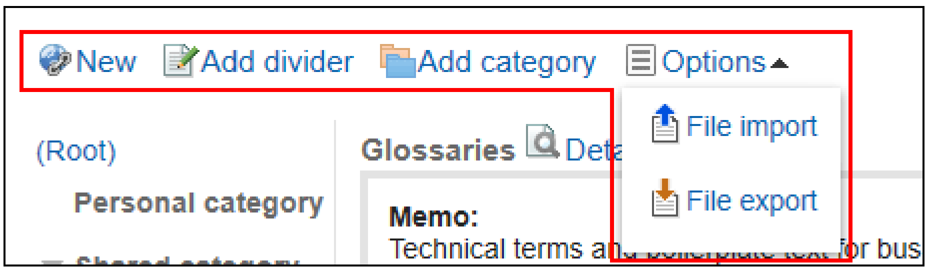
2.3.3. Setting Operational Administrative Privileges for Shared Categories

Operational administrators are administrators who are granted operational administrative privileges to manage categories by the system administrator.

When set as operational administrator, "Options" appears on the "Link collection" screen and "category details" screen, and you can manage shared links on the user screen.

Operational administrators can do the following tasks:

On the "Bookmarks" screen:



- Adding a shared link
  For details, refer to How to add shared links(820Page).

- Adding a shared separator line
  For details, refer to How to add a dividers(825Page).
- Adding a shared category
  For details, refer to how to add a shared category(800Page).
- Options:
  - Import Shared links and separators
  - Export shared links/separator lines

  For details, refer to Managing shared links and dividers in a CSV file(830Page).

On the "Category details" screen:

- Change HTML portlets:
  For details, refer to how to change a shared category(802Page).
- Move to
  For details, refer to how to move a shared category(803Page).
- Delete HTML portlets:
  For details, refer to how to delete a shared category(806Page).
- Setting Access Permissions:
  For details, refer to how to set permissions(814Page).
- Reorder subcategories
  For details, refer to Reordering Subcategories(804Page).
- Reorder Links and Separators
  For details, refer to How to reorder shared links and dividers(825Page).

Adding Operational Administrative Privileges

Create operational administrators for each shared category.

Operational administrator settings are inherited by subcategories.

Steps:

1. Click the administration menu icon (gear icon) in the header.

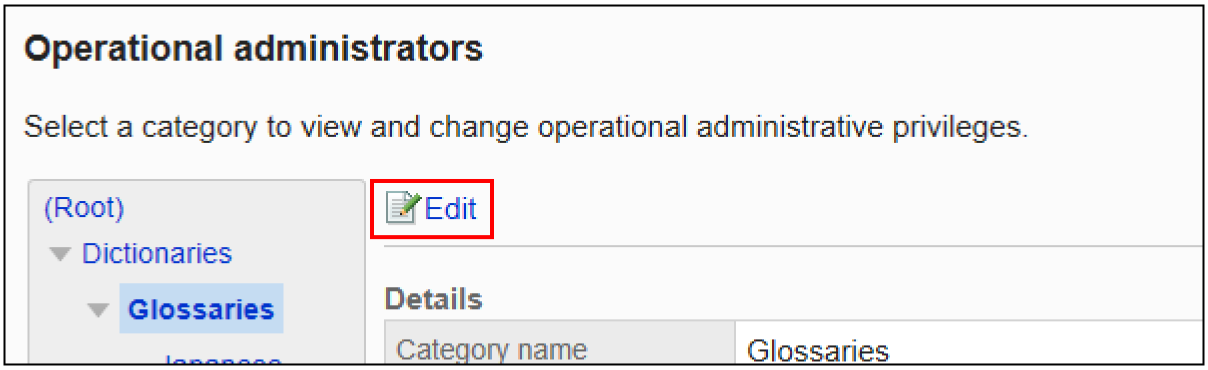
2. Click "System settings".

3. **Select "Application settings" tab.**

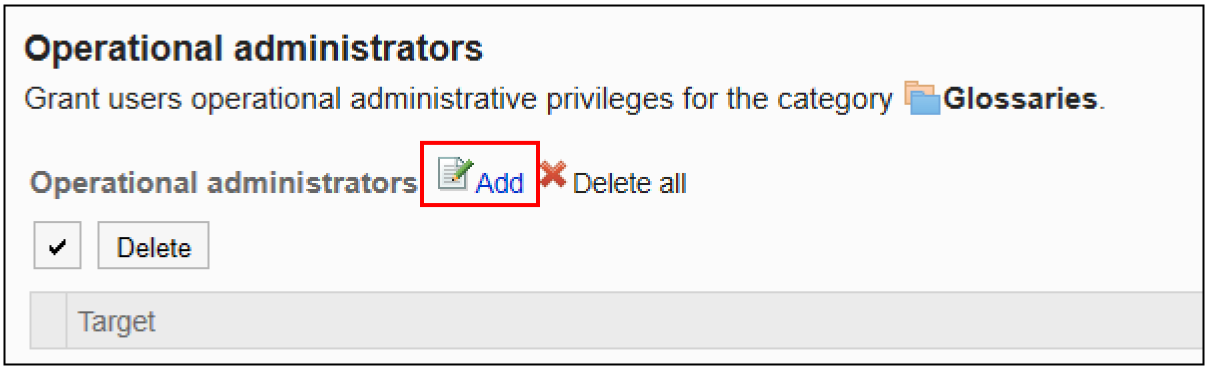
4. **Click "Links".**

5. **Click "Operational administrators".**

6. **On the "Operational Administrative Privileges Settings" screen, select a shared category and click "Save".**



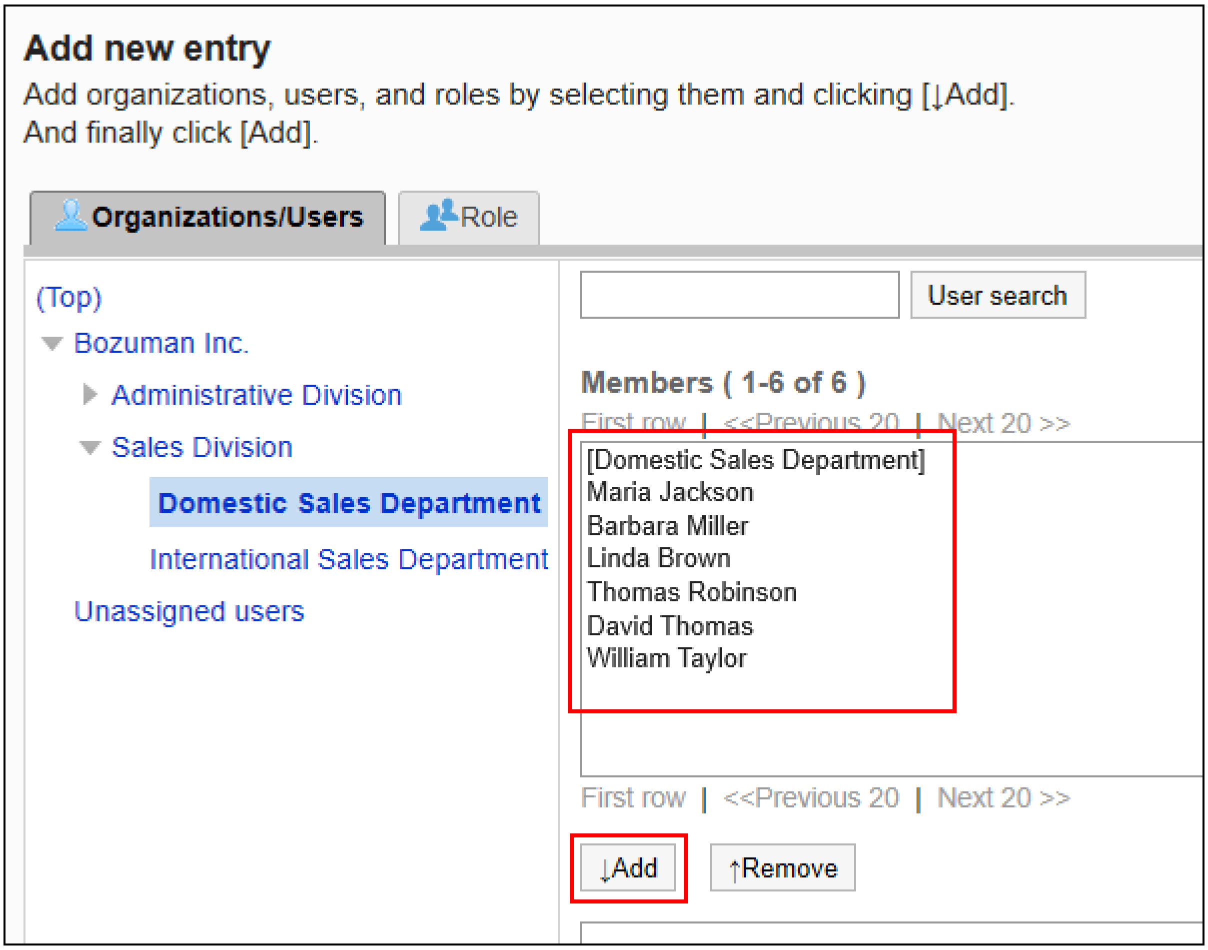
7. **On the screen for operational administrative privilege list, click "Add".**



8. **On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. Confirm your settings and click "Add".

Deleting Operational Administrative Privileges

Delete the operational administrators who are managing shared categories.

On the screen of users who have been deleted operational administrative privileges, a menu for managing shared links does not appear.

Caution

- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

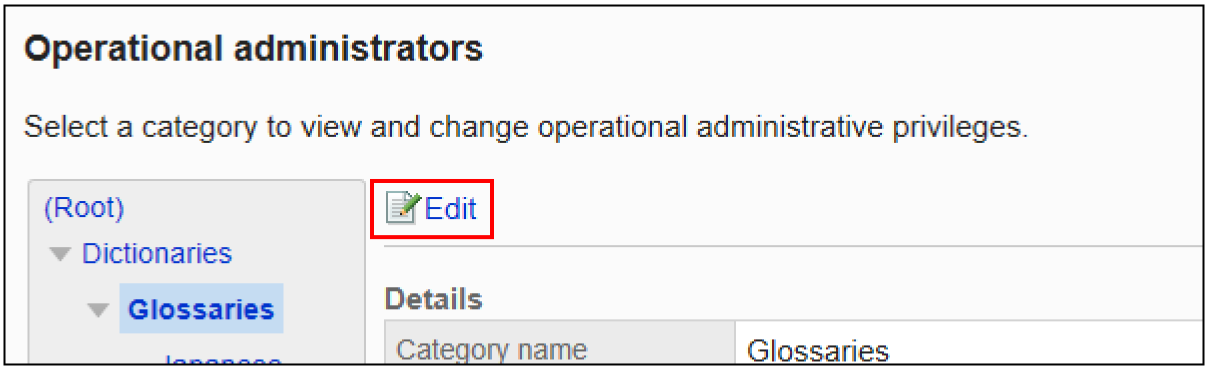
2. **Click "System settings".**

3. **Select "Application settings" tab.**

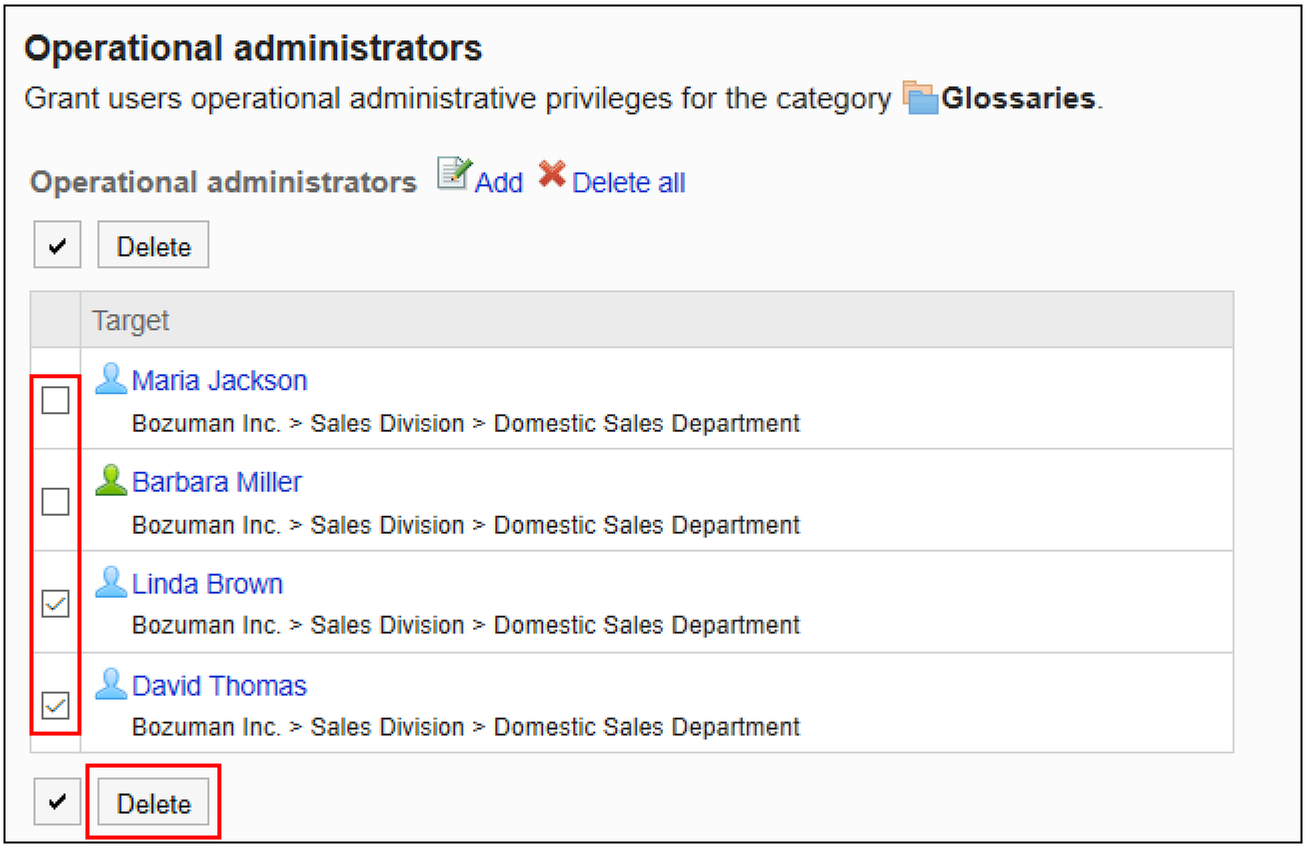
4. **Click "Links".**

5. **Click "Operational administrators".**

6. **On the "Operational Administrative Privileges Settings" screen, select a shared category and click "Save".**



7. **On the screen for operational administrative privilege list, select the check boxes of the operational administrative privileges to delete, then click "Delete".**



8. Click "Yes" on the screen to delete all operational administrative privileges.

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. Click the administration menu icon (gear icon) in the header.

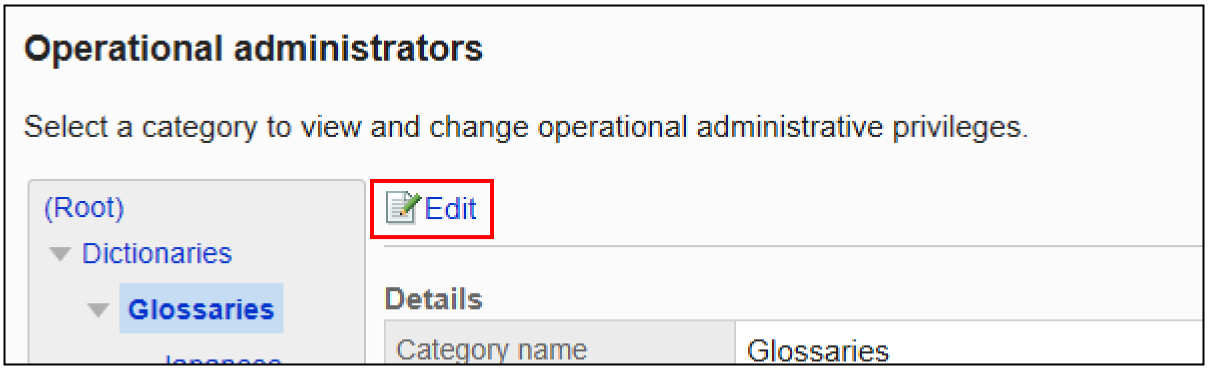
2. Click "System settings".

3. Select "Application settings" tab.

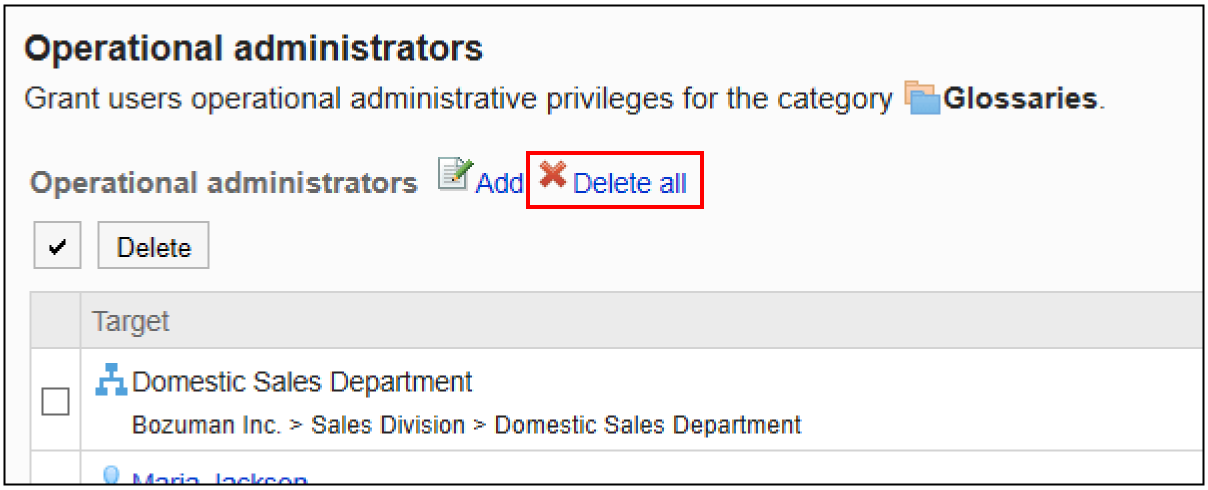
4. Click "Links".

5. Click "Operational administrators".

6. On the "Operational Administrative Privileges Settings" screen, select a shared category and click "Save".



7. **On the screen for "List of operational administrative privilege", click Delete all.**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.3.4. Setting Access Permissions for Shared Categories

For categories, set the following permissions for departments, users, or roles.

- Access permissions

Permissions that are set for shared categories are not inherited by subcategories.

The permissions for a link collection vary by security model.
The default setting is set to "REVOKE (All users have access except users on list)". All users are allowed to view all categories.
For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

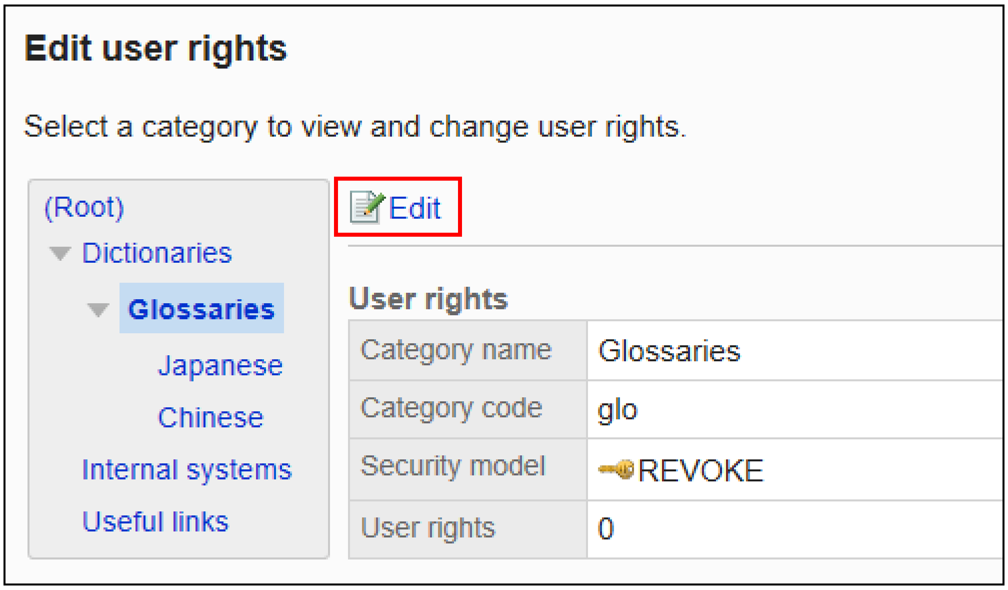
The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

Steps:

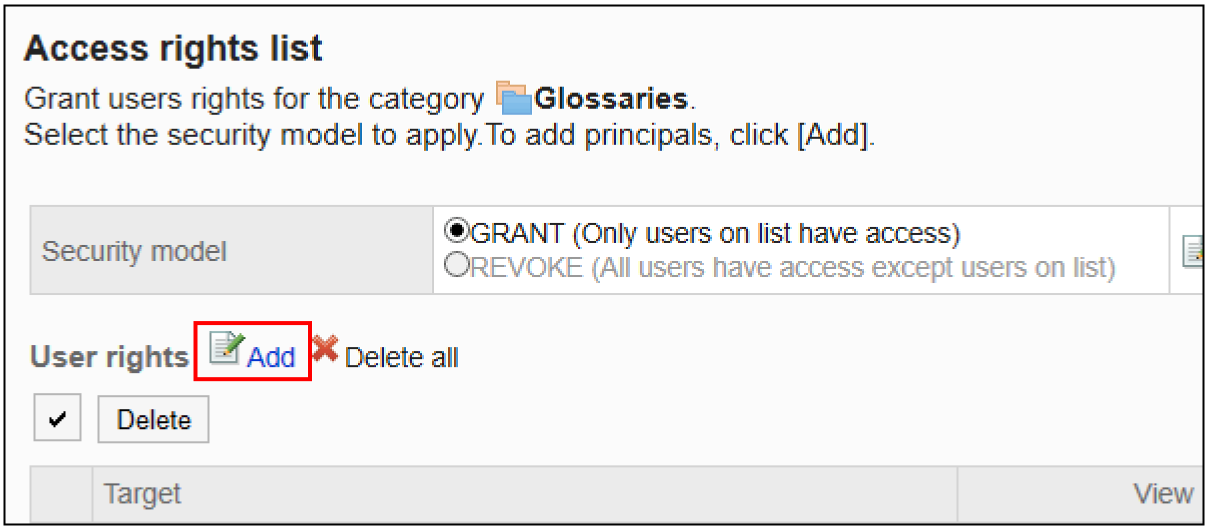
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Links".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select a shared category and click "Edit".**



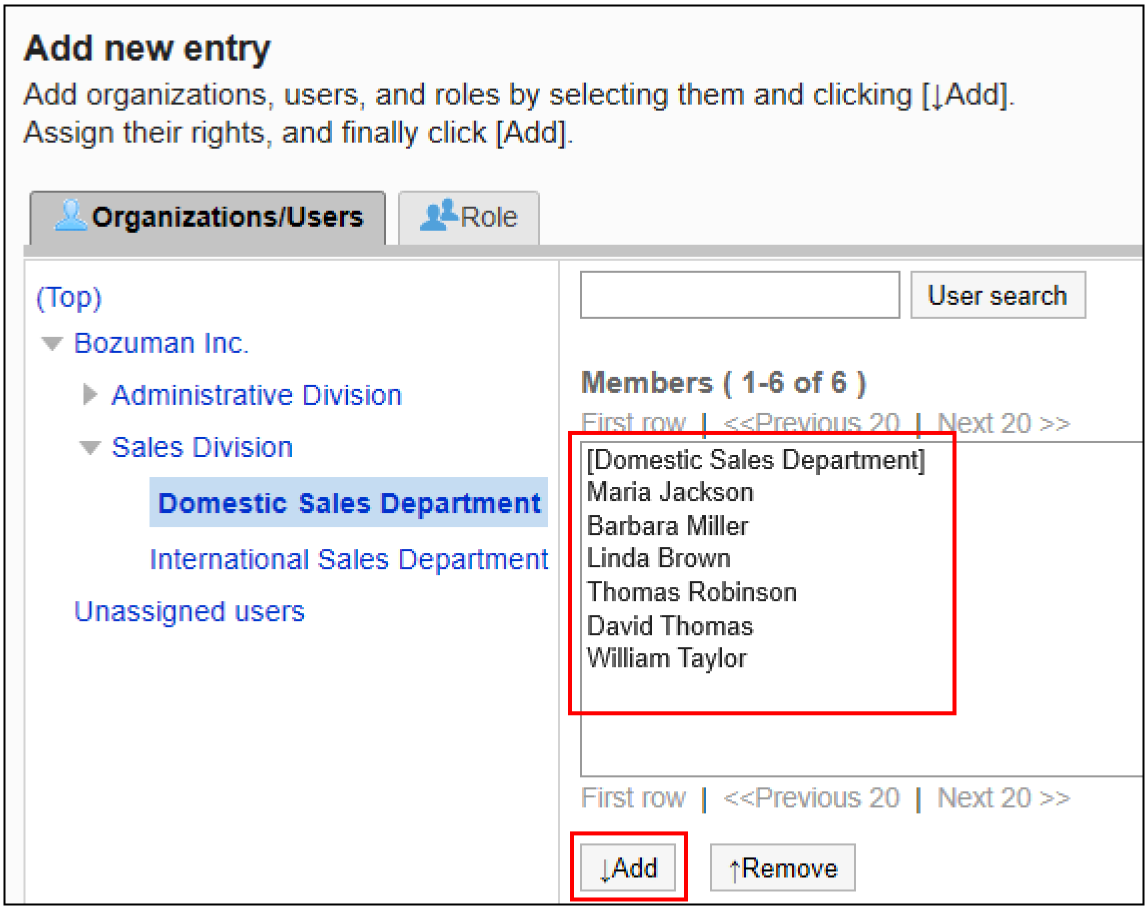
7. **Check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).

8. **On "User rights" screen, click "Add".**



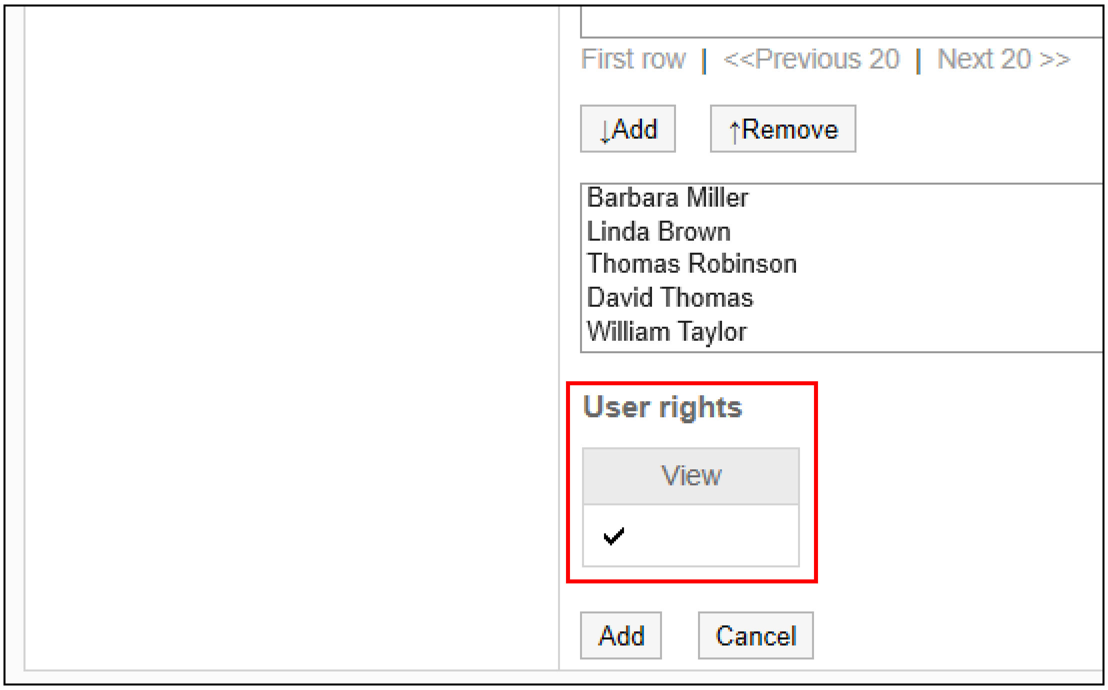
9. **On "Add new entry" screen, select the department, user, or role to set permissions, and click "Add".**



To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.

10. Under "Add", confirm that "view" has been selected.



11. Confirm your settings and click "Add".

Deleting User Rights

Delete access permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

Select and delete user rights.

Steps:

1. Click the administration menu icon (gear icon) in the header.

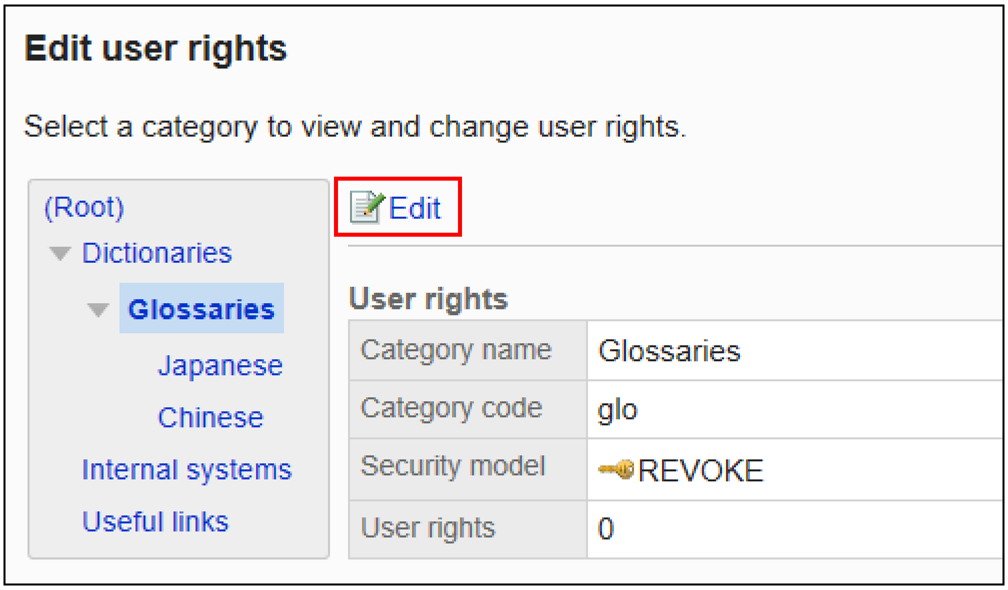
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Links".

5. Click "Edit user rights".

6. On the "Edit user rights" screen, select a shared category and click "Edit".



7. **On the "User Rights List" screen, select the check box for which you want to delete the user rights, and then click "Delete".**

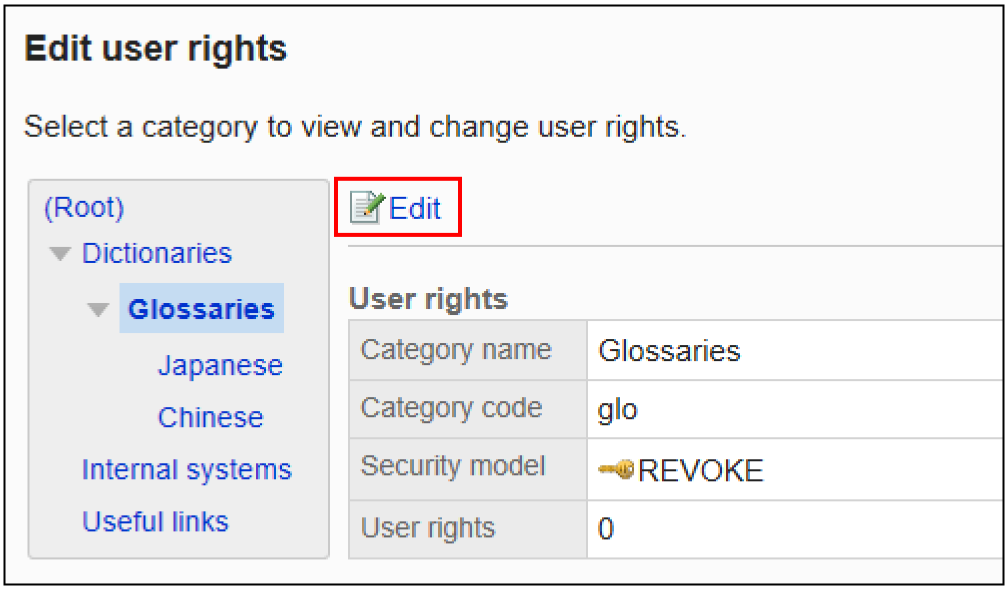
8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

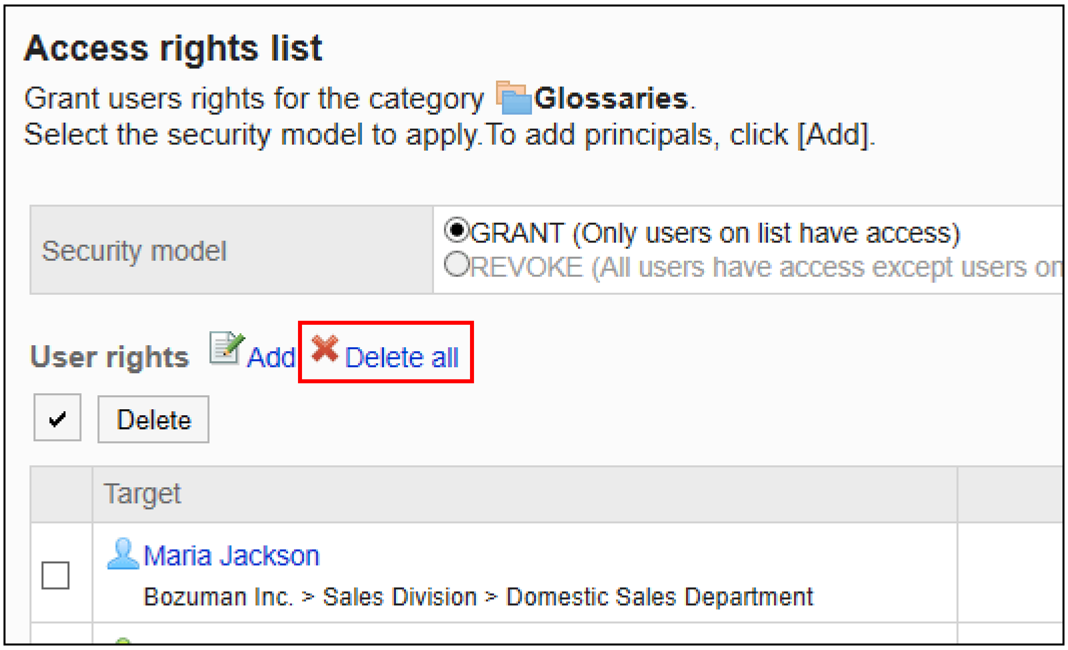
Delete all permissions.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Links".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select a shared category and click "Edit".**



7. **On "User rights" screen, click "Delete all".**



8. **Click "Yes" on "Delete all user rights" screen.**

2.3.5. Setting Up Shared Links

Describes how to set a shared link or a separator line for a shared category.

Adding Shared Links

Adds a shared link to the shared category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

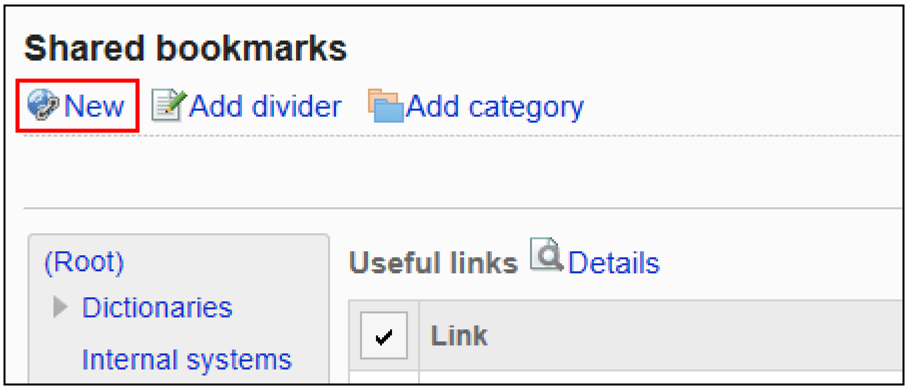
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Links".**

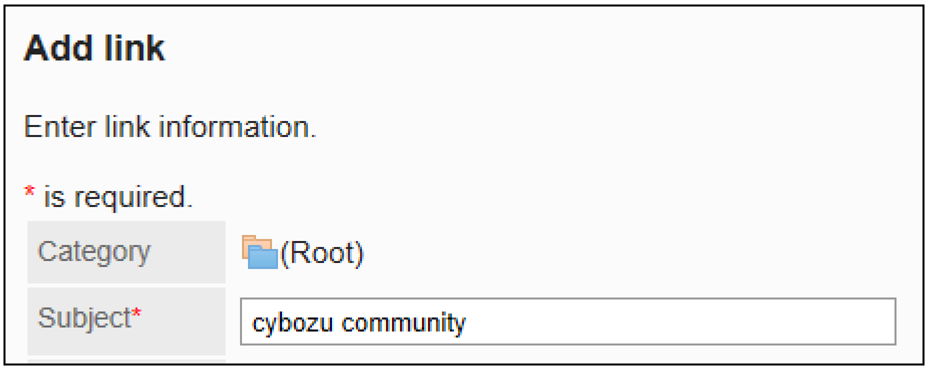
5. **Click "Shared Links".**

6. **On the "Shared Links" screen, select a shared category and click "Add Shared Links".**



7. **On the "Add shared Links" screen, enter a title.**

This is a required field.



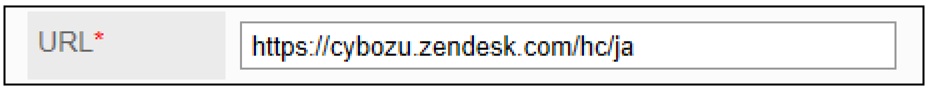
8. **In the "URL" field, enter a URL.**

The URL is mandatory.

The following characters can be used for the destination URL

- a to z
- A-Z
- 0 to 9
- Symbols:
    - % : / ? # [ ] @ ! $ & ' ( ) * + , ; = - . _ ~

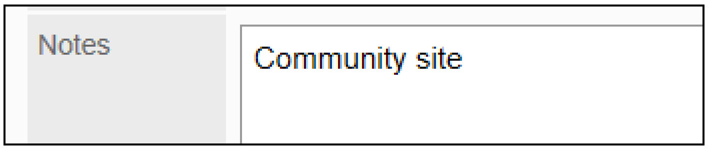
      URLS starting with "MMS://" cannot be used for shared links.



9. **Set the Notes field as needed.**

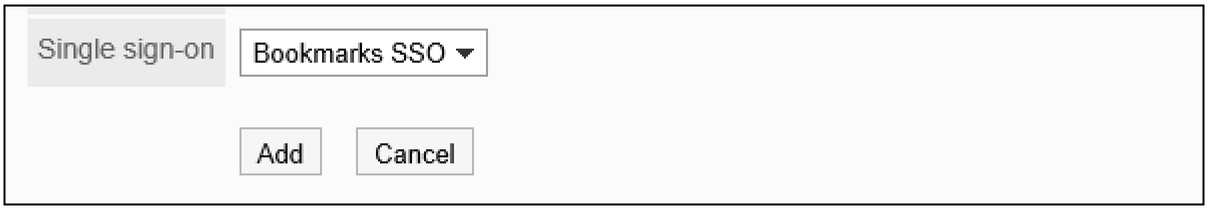
Enter a description of the shared link.

The contents entered in the "Notes" field are displayed on the "Link details" screen.



10. Configure the "Single Sign-On" item as required.

Select this to include user profile items in the login information used to log in with single sign-on to another system. Select from the configured single sign-on.



11. Confirm your settings and click "Add".

Changing Shared Links

Change shared links.

Steps:

1. Click the administration menu icon (gear icon) in the header.

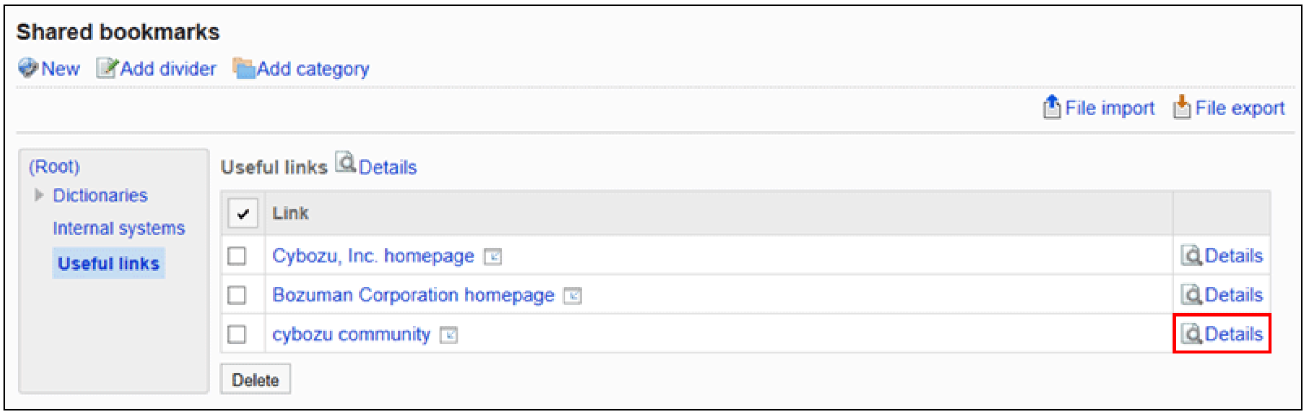
2. Click "System settings".

3. Select "Application settings" tab.

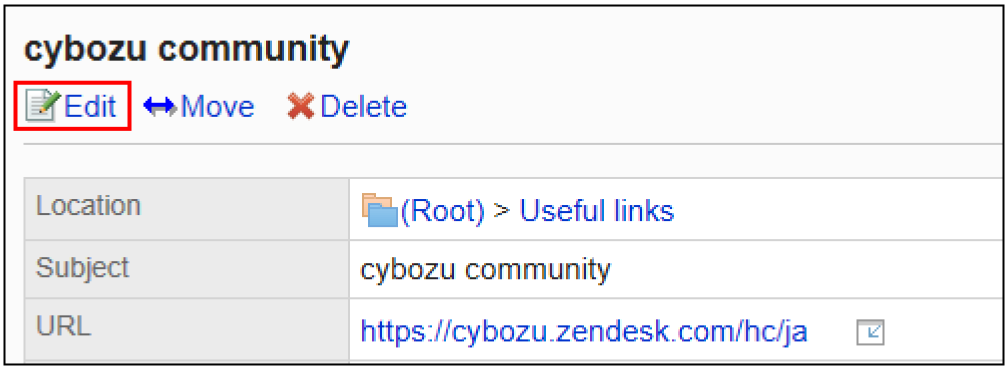
4. Click "Links".

5. Click "Shared Links".

6. On the "Shared Links" screen, select a shared category, and then click "Details" for the shared link you want to change.



7. **On the "Shared Link Details" screen, click "Edit".**



8. **On the "Edit Shared link Information" screen, you can change the fields as necessary.**

9. **Confirm your settings and click "Save".**

Moving Shared Links

Move the shared link to another shared category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

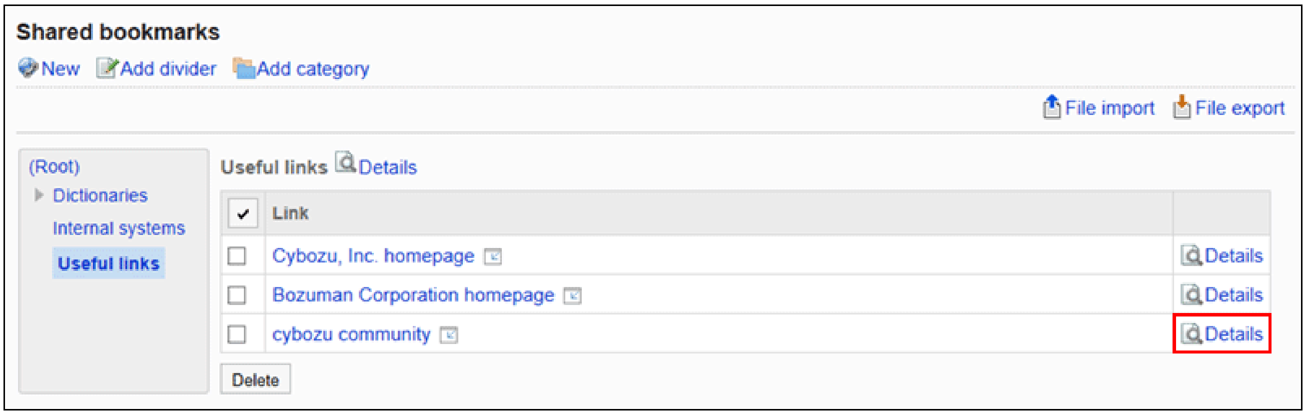
2. **Click "System settings".**

3. **Select "Application settings" tab.**

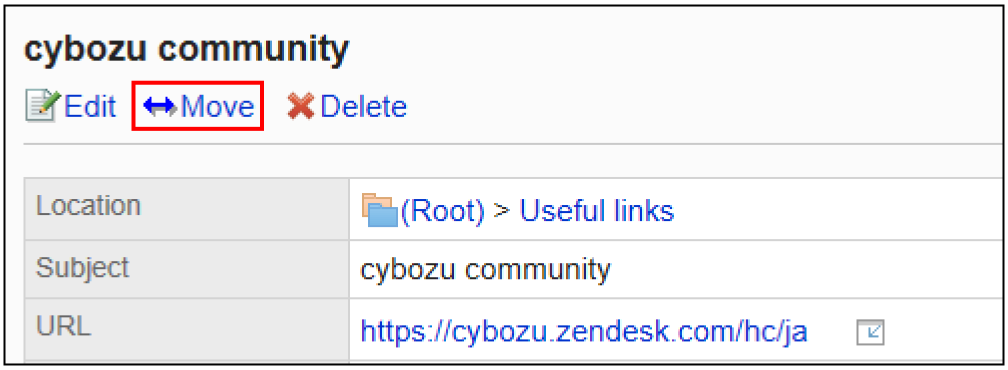
4. **Click "Links".**

5. **Click "Shared Links".**

6. **On the "Shared Links" screen, select a shared category, and click "Details" on the shared links you want to move.**



7. **On the "Shared Link Details" screen, click "Move".**

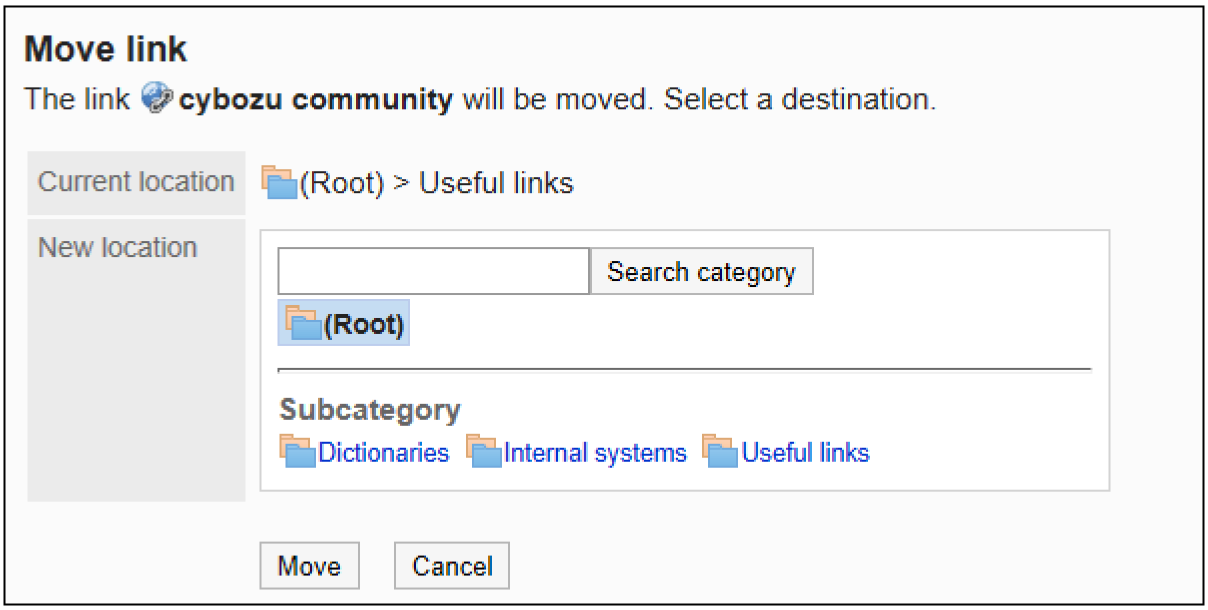


8. **Select the shared category where you want to move it, and then click "Move".**

You can search for a shared category by entering keywords and clicking "Search category".

When you click "Up one", you can move up one shared category.

Clicking a shared category name moves it to the subcategory you clicked.



9. **Confirm your settings and click "Move".**

Adding Dividers

Adds a separator line to the shared category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Links".**
5. **Click "Shared Links".**
6. **On the "Shared Links" screen, select a shared category and click "Add Shared Separator".**

7. **Click "Yes" on the "Add shared separator" screen. The added separator lines are displayed at the bottom of the shared category.**

Reorder Shared Links and Dividers

Change the link of a shared category, or the order of the separator lines.

You can change the order of shared links or separator lines only in the same category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

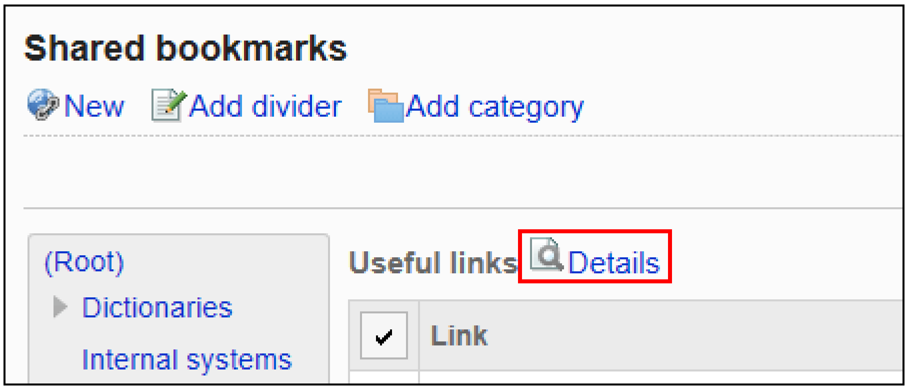
2. **Click "System settings".**

3. **Select "Application settings" tab.**

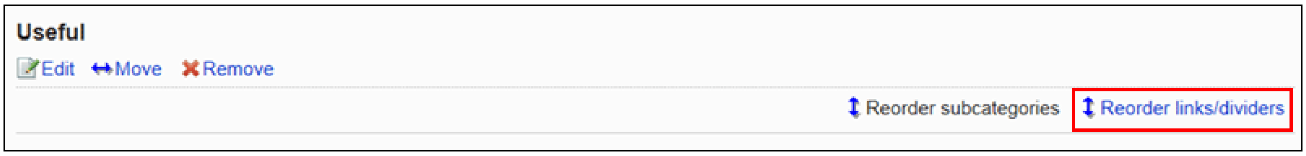
4. **Click "Links".**

5. **Click "Shared Links".**

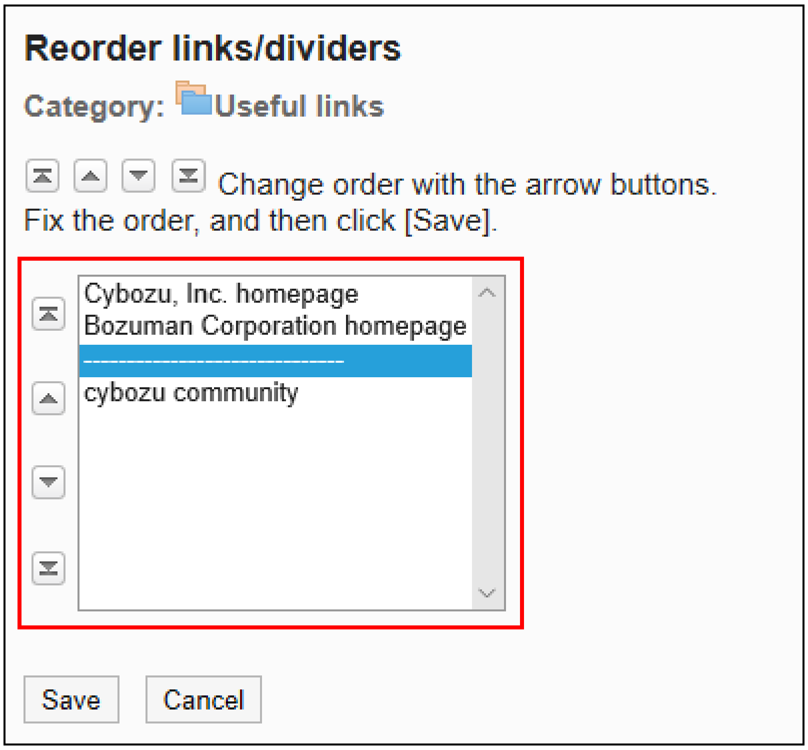
6. **On the "Shared Links" screen, select a shared category and click "Details".**



7. **On the "Shared category Details" screen, click "Reorder Shared Links/separators".**



8. **On the "Reorder shared links/separators" screen, reorder shared links and separator lines.**



9. Confirm your settings and click "Save".

Deleting Shared Links and Dividers

Delete shared links or separator lines in shared categories.

Caution

- Deleted shared links cannot be restored.

Delete Shared Links One by One

Delete Shared links.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

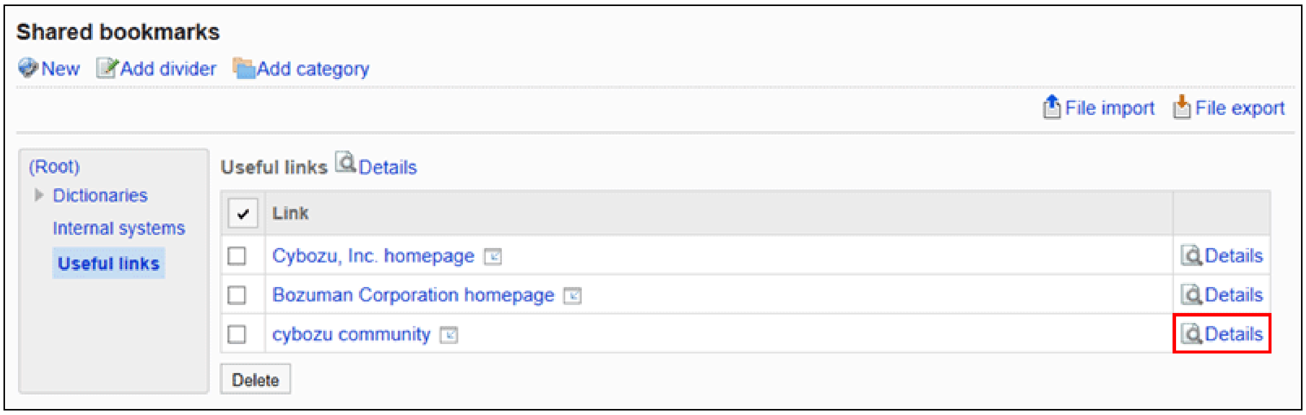
2. Click "System settings".

3. **Select "Application settings" tab.**

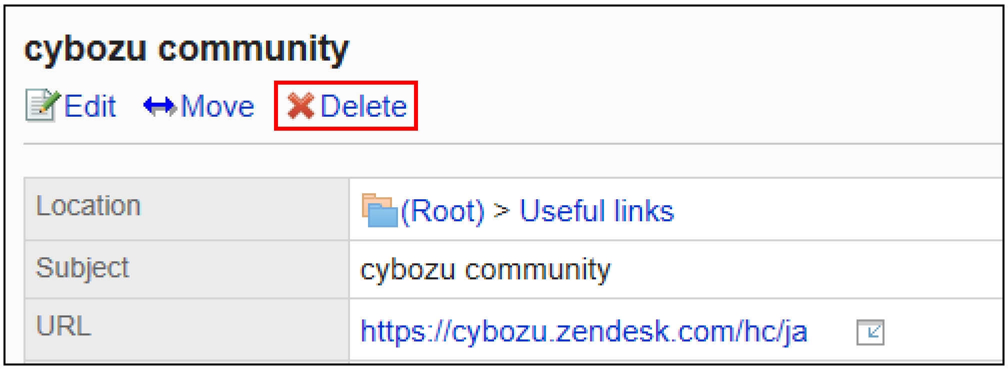
4. **Click "Links".**

5. **Click "Shared Links".**

6. **On the "Shared Links" screen, select a shared category, and then click "Details" for the shared link you want to delete.**



7. **On the "Shared Link Details" screen, click "Delete".**



8. **Click "Yes" on the "delete shared Links" screen.**

Deleting Multiple Shared Links and Dividers Together

Select a shared link of a shared category, or a separator line, and delete it all together.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

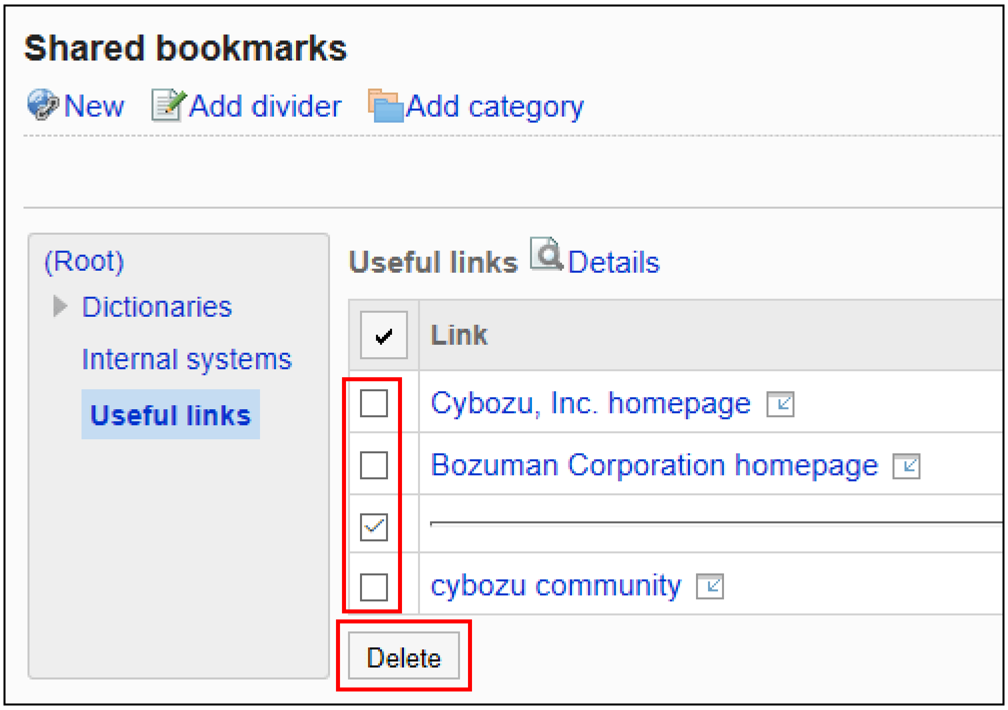
3. **Select "Application settings" tab.**

4. **Click "Links".**

5. **Click "Shared Links".**

6. **On the "Shared Links" screen, select a shared category.**

7. **Select the check box for the shared link or separator line you want to delete, and then click "Delete".**



8. **Click "Yes" on the "delete shared links/separator lines" screen.**

2.3.6. Data Management Using CSV Files

Manages a CSV file.

The following data can be managed using CSV files:

- Shared links
- Separator data
- Access Permissions

Managing Shared Links and Dividers Using a CSV File

Manages shared links or the separator lines in a CSV file.

Importing Data from a CSV File

Import shared links or separator lines data from a CSV file to a shared category.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on CSV files, refer to shared links and dividers(1831Page) in CSV format.

2. **Click the administration menu icon (gear icon) in the header.**

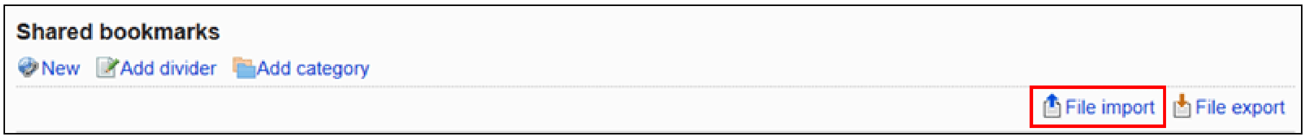
3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Links".**

6. **Click "Shared Links".**

7. **On the "Shared Links" screen, select a shared category and click "Import shared Links/ separator lines".**



8. **On the "Import link/divider-Step 1/2" screen, select the CSV file that you created in step 1.**

9. **Set the data to import, and click "Next".**

   The setting fields are as follows:

   - Character encoding:

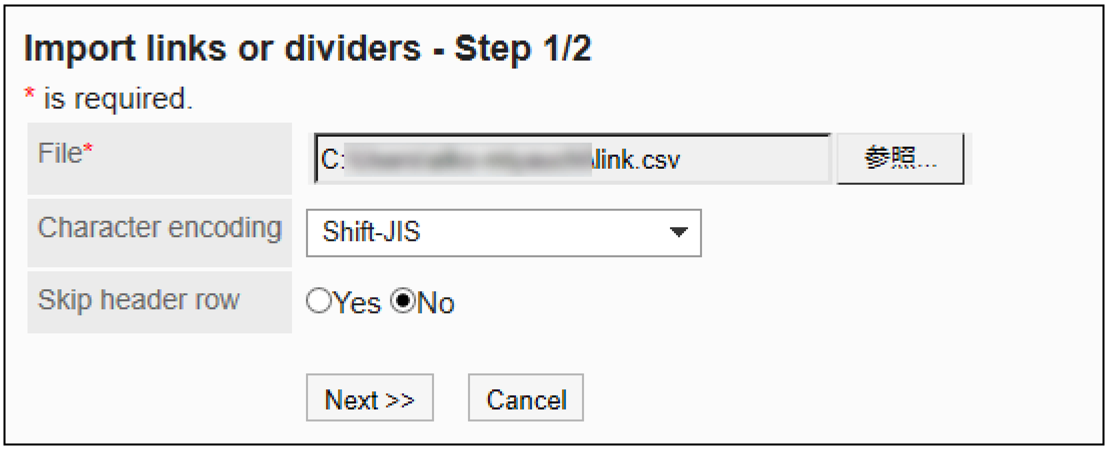
     Encodes data from a CSV file with the selected character code.

     The following character encoding can be selected:

     - Unicode (UTF-8)

- Japanese (Shift-JIS)
- ASCII
- Latin1 (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)

• Skip the first row:
If the header row contains information other than data such as an item name and a comment, select "Yes".



10. On the "Import link/divider-Step 2/2" screen, confirm the contents of the CSV file, and then click "Import".

Exporting Data to a CSV File

Export shared links or separator lines data to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

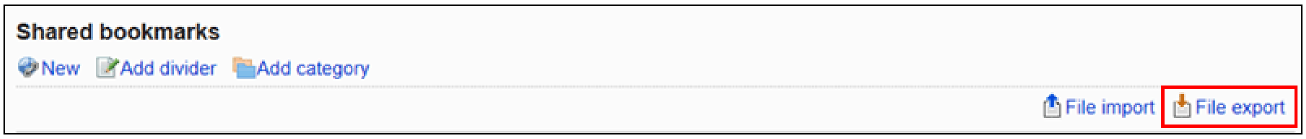
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Links".

5. Click "Shared Links".

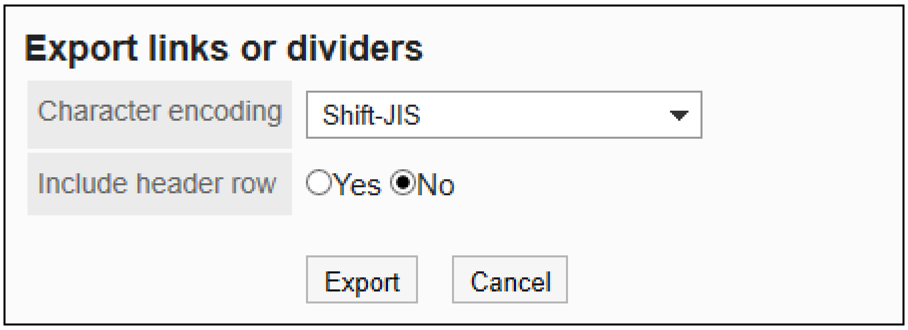
6. On the "Shared Links" screen, select a shared category and click "Export shared Links/ separator lines".



7. On the "Export shared links/separators" screen, set the required items for the exported data.

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  The following character encoding can be selected:
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".



8. Confirm your settings and click "Export".

9. Save the file with a function provided by your Web browser.

Managing User Rights Using a CSV File

Manages the user rights settings in a CSV file.

Importing Data from a CSV File

Import the user rights settings from a CSV file.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on which items can be managed in a CSV file, refer to the CSV format for user rights(1832Page) on links.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Links".**

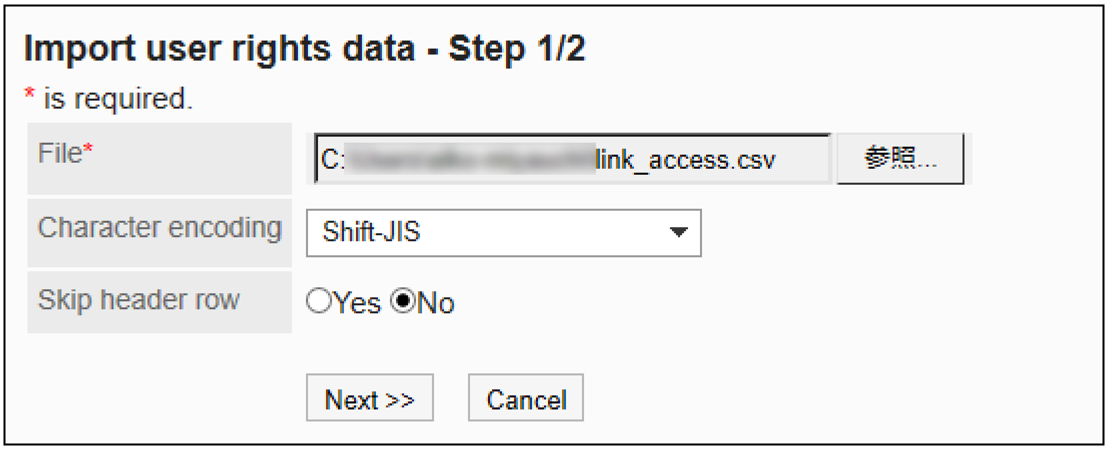
6. **Click the item to import the user rights.**

7. **On the screen to import the user rights step 1/2, select the CSV file that you created in step 1.**

8. **Set the data to import, and click "Next".**

   The setting fields are as follows:

   - Character encoding:
     Encodes data from a CSV file with the selected character code.
     Following character codes can be selected.
     - Unicode (UTF-8)
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)
   - Skip the first row:
     If the header row contains information other than data such as an item name and a comment, select "Yes".



9. On the screen to import the user rights step 2/2, check the contents in the CSV file, and click "Import".

Exporting Data to a CSV File

Export the user rights settings to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Links".

5. Click to export user rights.

6. On the screen to export user rights, set the required items to export data.

The setting fields are as follows:

- Character encoding:

  Select the character code that you want to use for encoding.

  Following character codes can be selected.

  - Unicode (UTF-8)

    You can select with BOM as required.

  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)

- Thai (TIS-620)

- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".

7. Confirm your settings and click "Export".

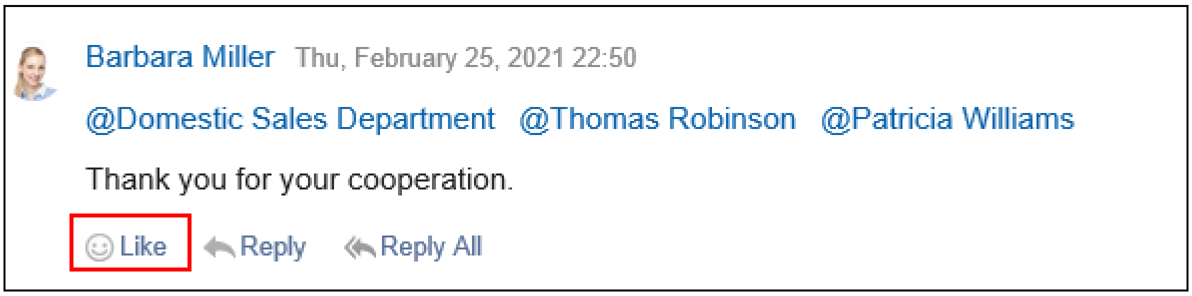
8. Save the file with a function provided by your Web browser.

2.4. Scheduler

Scheduler is an application to manage appointments.
You can use this application to add appointments and reserve facilities for departments and users.
System administrator and application administrators can add facilities to manage reservations and set user rights.

Using Respond Feature

By using the respond feature, you can make a quick response to the message content or any comments.
Users can show their intention by clicking a link such as "Like" and "Acknowledged" without posting any comment.
You can use the respond feature in Garoon version 5.9.0 or later.



When you start or stop using the Respond ("Like") Feature in Scheduler, you should configure the following two settings.

- Allowing to use the respond feature:
  For details, refer to the "Using Applications(206Page)" section.
- Allowing to use the respond feature in Scheduler:
  For details, refer to General Settings for Responses(1648Page).

If you want to change the label of "Like", refer to "Respond(1647Page)".

References

- To Add More Appointment Items
- General settings for Scheduler(836Page)
- Setting up Appointment Types(853Page)
- Setting up Facility Groups(867Page)
- Setting up Operational Administrative Privileges for Facility Groups(875Page)
- Facility settings(880Page)
- Setting Access Permissions for Scheduler(907Page)
- New appointment

2.4.1. General Settings for Scheduler

On the "General Settings" page of scheduler, you can set basic scheduler functions.

Update Information

- November 2021:
  - In Garoon version 5.9.0 and later, you can specify "Shared with" users in appointments.
    - We have changed the name of "Watchers" to "Shared with".

Setting up Units of Time to Select When Adding Appointments

Select the units of time in which you can add appointments and reserve facilities.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **In the field for setting the units for appointments on "General settings" screen, select time as the unit.**

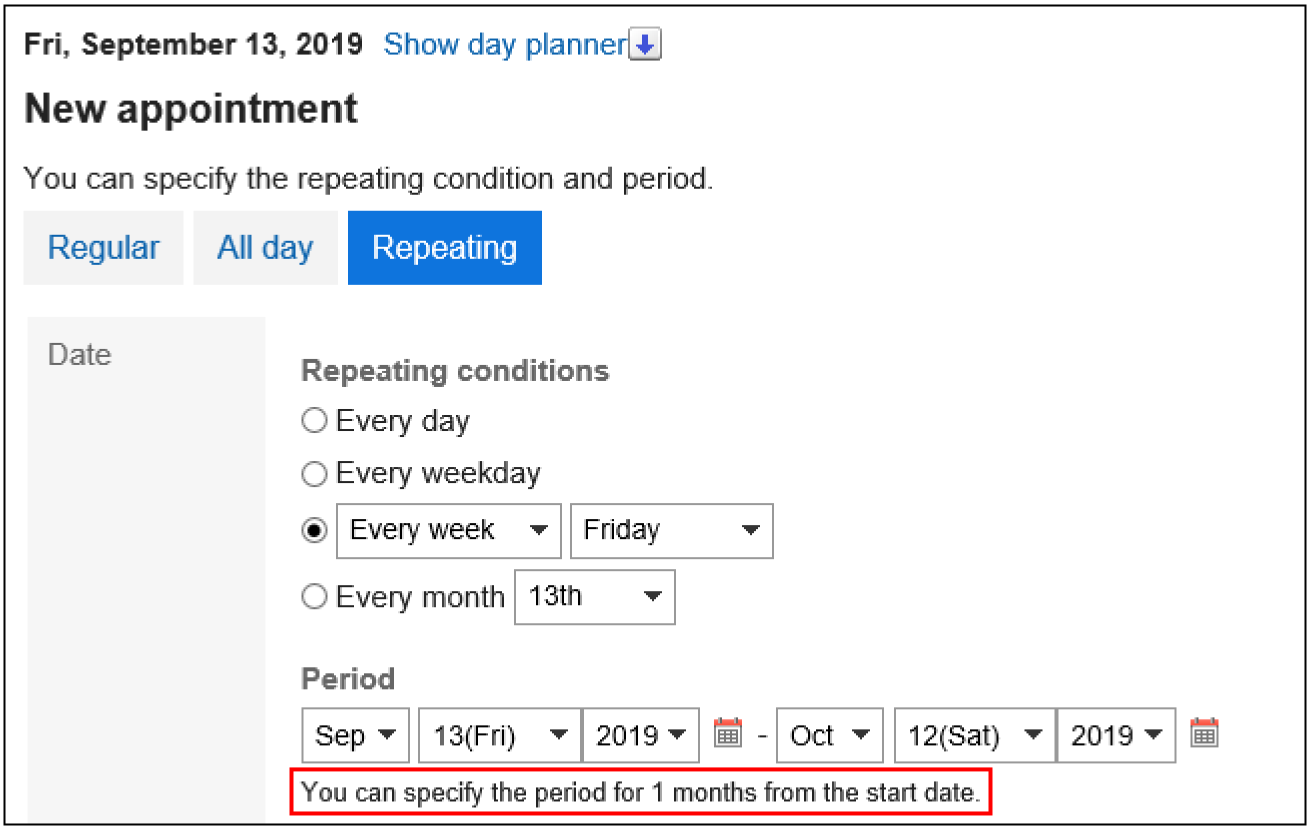
   The following time units can be set:
   - 5 minutes
   - 10 minutes
   - 15 minutes
   - 30 minutes

7. **Confirm your settings and click "Save".**

Setting up Repeating Appointment Periods

Set the period in which you can add repeating appointments.

An example of setting the period for repeating appointments "one month":



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click "General Settings".**

6. **In the field to set the period for repeating appointments in "General Settings" screen, select the period.**

   The following period can be set:

   - 1 month
   - 2 months
   - 3 months
   - 4 months
   - 5 months
   - 6 months
   - 1 year

7. Confirm your settings and click "Save".

Allowing Users to Add Private Appointments

Select whether to allow users to add private appointments.

If you allow users to add private appointments, you must also set the default value for visibility of appointments.

What Are Private Appointments?

Only creators, attendees, and "Shared with" users can view, edit, or delete private appointments. Other users cannot view the details of private appointments.

If you allow users to add private appointments in general settings, they can add private appointments.

If you do not allow users to add private appointment, the field does not appear on the appointment screen for users. All appointments will be Public.

Steps:

1. Click the administration menu icon (gear icon) in the header.

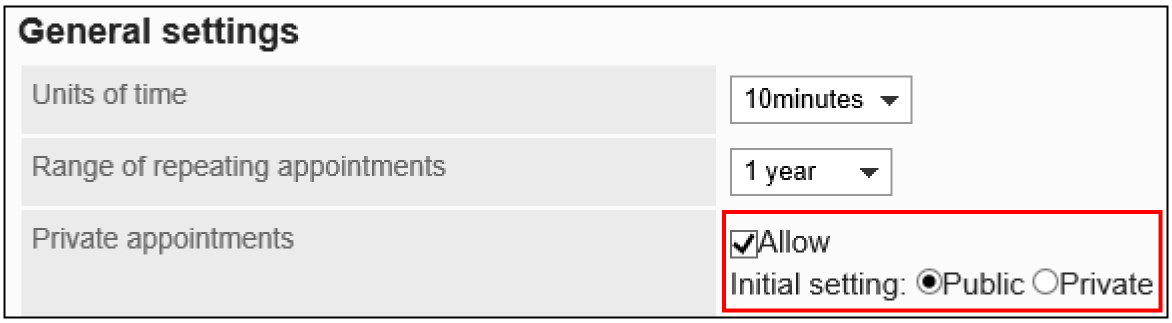
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Scheduler".

5. Click "General Settings".

6. In the "Private appointments" field on "General Settings" screen, select "Allow" check box.



7. Select the default visibility value for appointments.

The default visibility of appointments can be set only if you allow users to add private appointments.

The default values that can be set are as follows:

- Public

- Private

8. Confirm your settings and click "Save".

Note

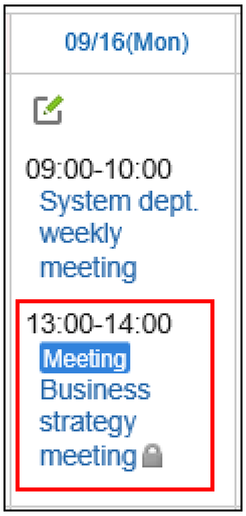
- KUNAI (sync mode) does not support the feature to set "Shared with" users.
  When you add an appointment in KUNAI (sync mode), the default value is "Public" regardless of the default value of appointments.

Hiding Private Appointments Completely

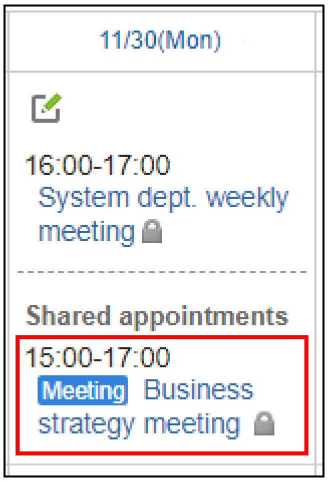
You can set how private appointments are displayed to users other than creators, attendees, and "Shared with" users. You can select whether to display the existence of private appointments or hide them completely.

Differences in the Visibility of Private Appointments

- **When the logged-in user is a creator, or set as an attendee/"Shared with" user**
  A private icon appears next to the appointment subject.

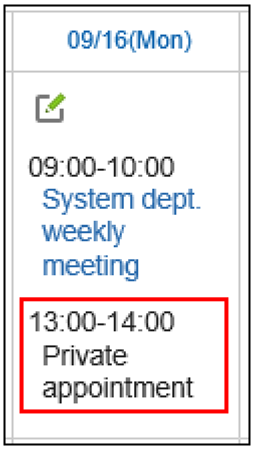


If the logged-in user is set as a "Shared with" user of a private appointment, the appointment is displayed in the Shared appointment area.

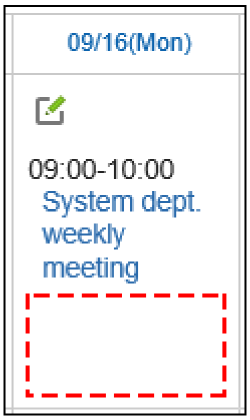


- **When the logged-in user is not a creator, nor set as an attendee/"Shared with" user**

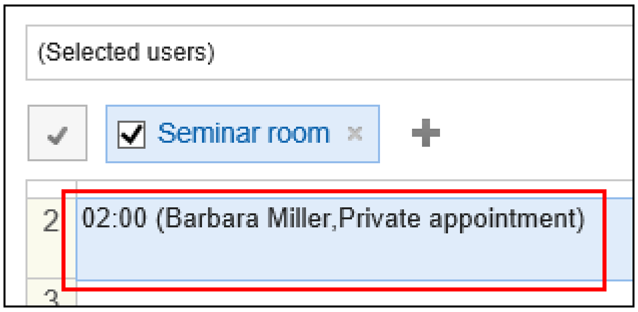
  "Private appointment" is displayed at the time of the appointment. The appointment details are not displayed.

  If you enable Hide private appointments setting, the information about private appointments is completely hidden. Other users cannot see anything about private appointments.

  If you plan to use a facility, the timeframe for use and the creator of the appointment will be displayed on the facility appointment.

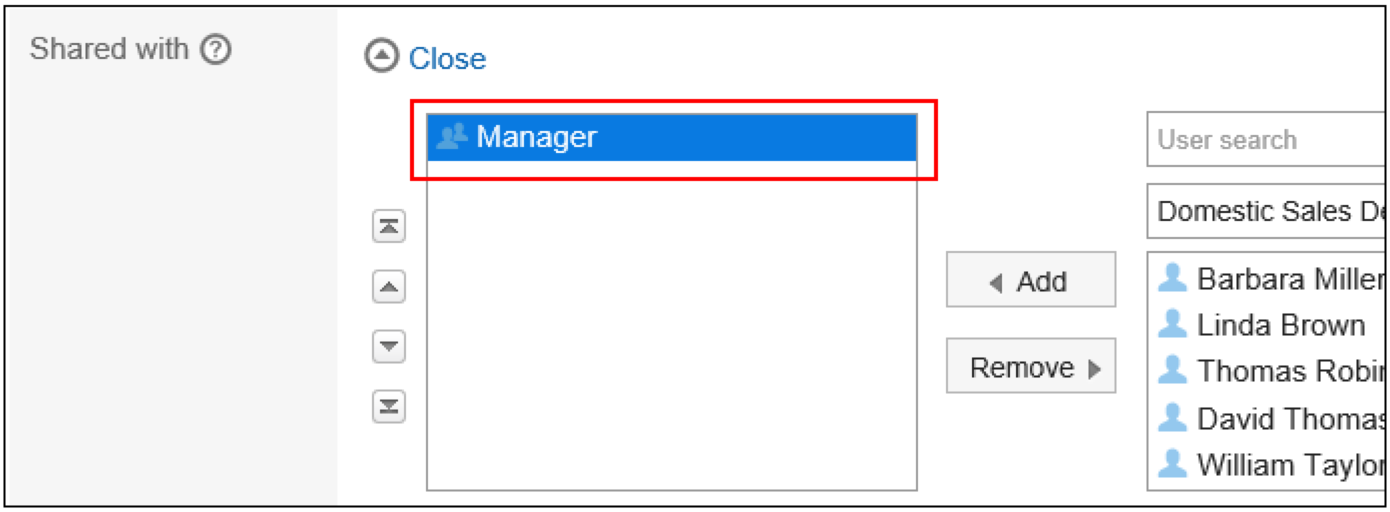


Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **In "Visibility of private appointments" field on "General settings" screen, select "Hide private appointments" check box.**
7. **Confirm your settings and click "Save".**

Allowing Users to Specify Organizations/Roles as "Shared with"

You can select whether to allow users to specify organizations or roles for "Shared with" users of appointments.



To allow users to specify roles for "Shared with", you also need to allow users to use roles.

For details, refer to Role Permissions(126Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **In "Specify organizations/roles for the "Shared with" users" field on "General Settings" screen, select "Allow" check box.**
7. **Confirm your settings and click "Save".**

Note

- Users who do not have the permission to view the appointments cannot view the appointments even though they are members of the organizations or roles that are specified as "Shared with" of the appointments.
  When you specify organizations or roles in higher levels for "Shared with", configure access permissions in lower level organizations or roles.
  For details, refer to Setting Access Permissions for Scheduler(907Page).

Setting up Notifications to "Shared with" Users

Select whether to send update notifications of an appointment (in which "Shared with" users are specified) to users who are not attendees of the appointment.

Caution

- If an appointment has a large number of "Shared with" users, the processing of adding, editing, and deleting the appointment may be delayed.
  If you allow users to specify organizations/roles for the "Shared with" field in General settings of Scheduler and

assume that a large number of "Shared with" users will be specified, we recommend that you select "Do not send notifications to the "Shared with" users" check box.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click "General Settings".**

6. **In "Notifications to the "Shared with" users" field on "General Settings" screen, select "Do not send notifications to the "Shared with" users" check box.**
   When the "Do not send notifications to the "Shared with" users" check box is selected, the update notifications will be sent to only attendees. The update notifications will not be sent to the users who are listed in the "Shared with" field.

7. **Confirm your settings and click "Save".**

Displaying Shared Appointments

Caution

- If the total number of organizations and roles the users belong to is 51 or more, they cannot see the shared appointments on the Scheduler screen even if they have configured to display them.
  If you want to display the shared appointments on the Scheduler screen, consider using the fewer number of organizations and roles to make the total number of organizations and roles less than or equal to 50.

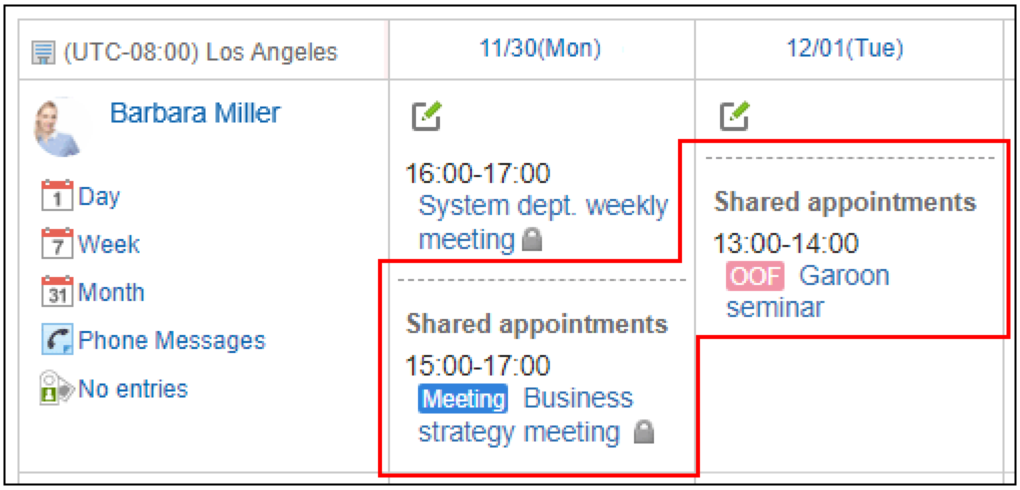
Select whether to display shared appointments in the Scheduler screen.

Shared appointments are displayed only in users' Scheduler screen.

If you set to display shared appointments in the Scheduler screen, we recommend you to set notifications to the "Shared with" users(843Page).

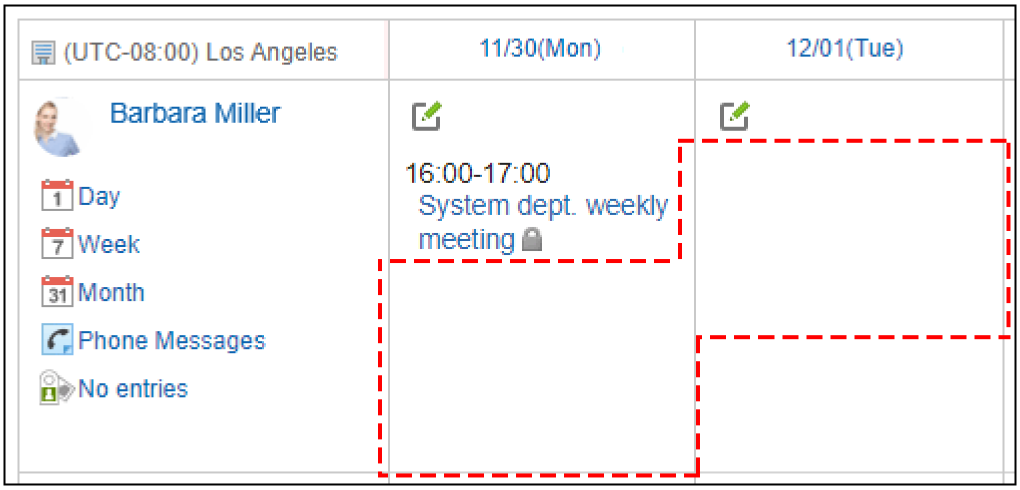
- **To display shared appointments in the Scheduler screen:**

  Shared appointments are displayed in the logged-in user's Scheduler screen.



- **Not to display shared appointments in the Scheduler screen:**

  Shared appointments are not displayed in the logged-in user's Scheduler screen.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

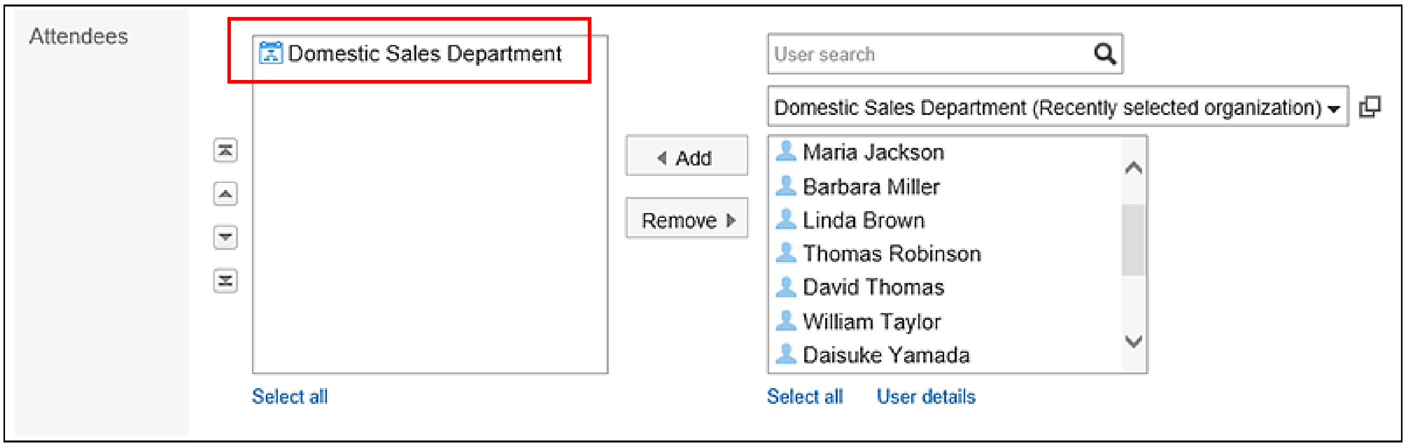
5. **Click "General Settings".**

6. **In the "Shared appointments" field on the "General settings" screen, select the "Show in the Scheduler screen" check box.**

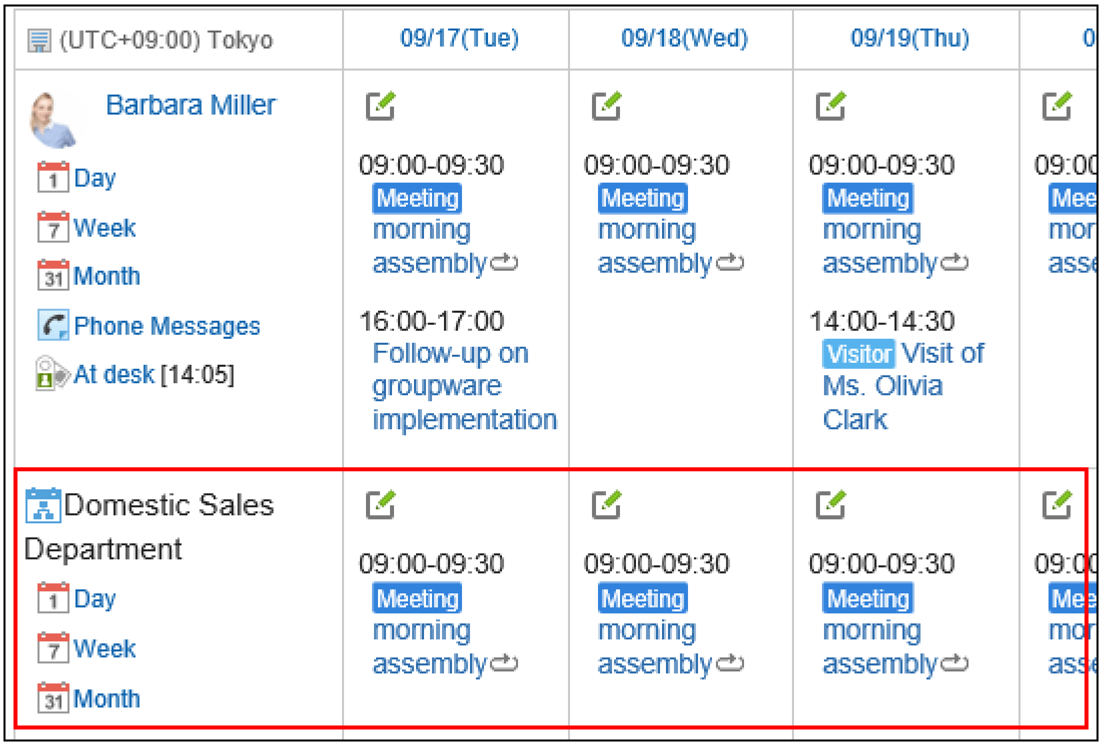
7. **Confirm your settings and click "Save".**

Displaying Organization's Appointments

If you make the organization's appointments visible, you can select the organization as an attendee.



Appointments selected and registered with organizations as their attendees can be displayed as those organizations' appointments in the Scheduler screen.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

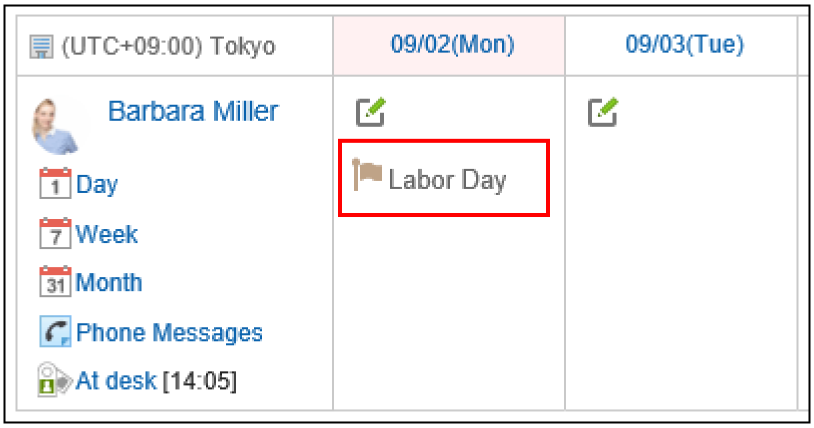
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **On the "General Settings" page, select "Show" check box for showing appointments of the department.**
7. **Confirm your settings and click "Save".**

Showing Holidays

Select whether to display holidays in the scheduler.



Steps:

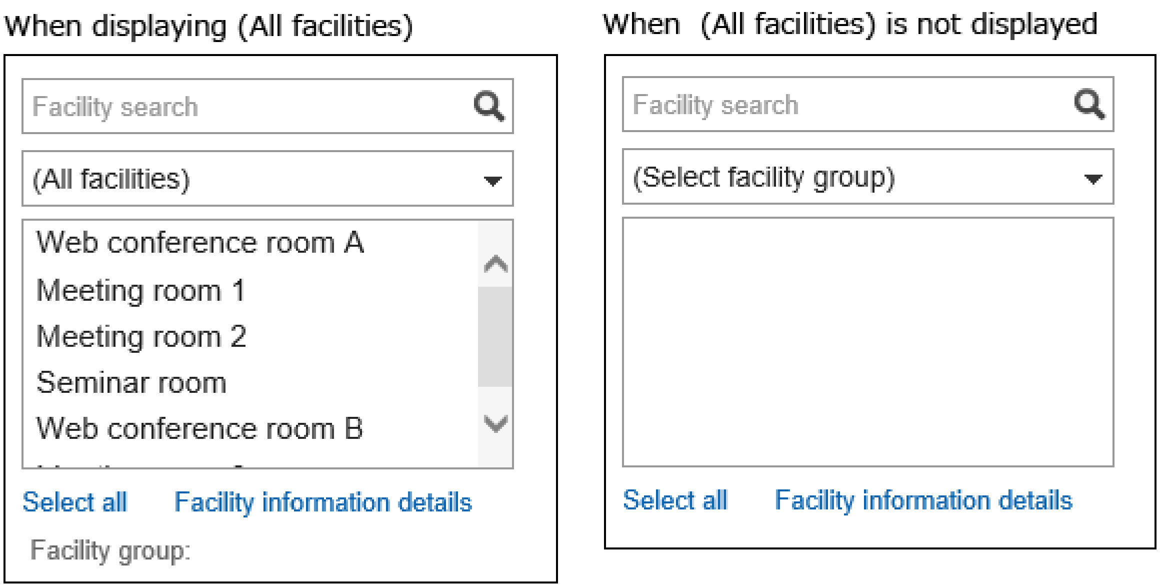
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **On "General settings" screen, select "Show" check box to show holidays.**
7. **Confirm your settings and click "Save".**

Showing All Facilities

Set whether to show "all facilities" as a selection in the drop-down list where users select facilities.

Caution

- If you added a large number of facilities or facility groups, we recommend that you do not display "(all facilities)". Displaying "(all facilities)" may cause lower performance.

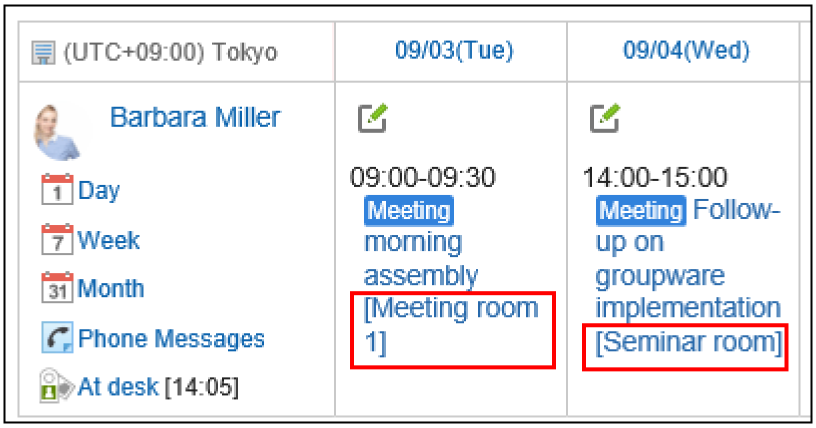


Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **On "General settings" screen, select "Show" check box to show "all facilities".**
7. **Confirm your settings and click "Save".**

Showing Facility Names

Set whether to show subjects of appointments with facility names.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click "General Settings".**

6. **In the field to show facility names on "General Settings" screen, select the check box to show before or after the subject of an appointment.**

7. **Select the position for the facility name.**

   The available positions are as follows:
   - Before subjects
   - After subjects

8. **Confirm your settings and click "Save".**

Allowing Drag and Drop to Move Appointments

Set whether to allow users to move appointments using drag and drop feature.

The screens and portlets support drag and drop for appointments are as follows:

- Day View Screen
- Week View Screen
- Scheduler (Day View) Portlet
- Scheduler (Week View) portlet

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **On "General settings" screen, select "Allow" check box for "Drag and drop moving" field.**
7. **Confirm your settings and click "Save".**

   If necessary, tell the users that now they can move appointments by dragging and dropping them.
   If your system administrator allows you to use drag and drop, "Display settings" page shows the "Drag and drop moving" field in schedulers.
   For details, refer to the topic to use dragging and dropping to move appointment.

Note

- **If the Drag and Drop Function Is Disabled in Internet Explorer**
  If you deselect "Display intranet sites in Compatibility View" in the Compatibility View settings in Internet Explorer, you can use the drag and drop function.

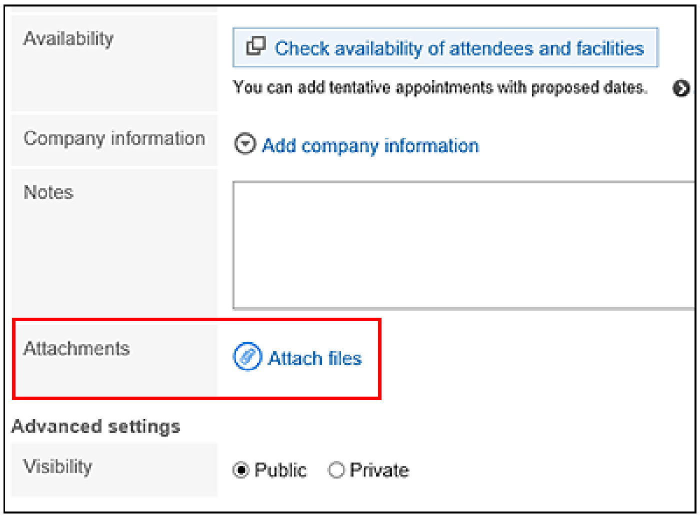
Allowing to Attach Files to Appointments

Set whether to allow users to attach files to appointments. If you allow it, users can attach files to appointments on "New appointment" screen or the screen to modify appointments.
However, the following screens cannot be used to attach files:

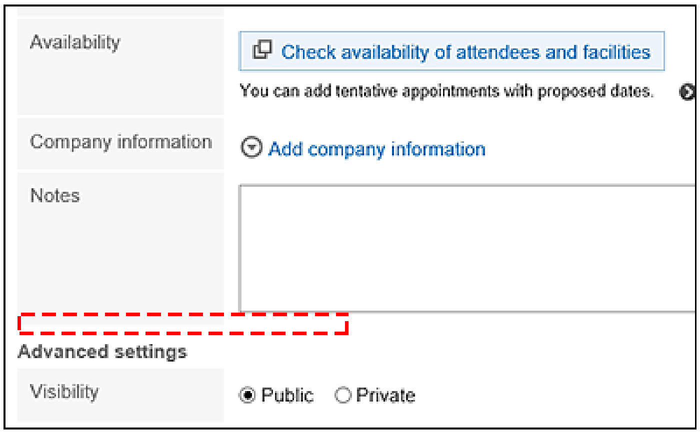
- Repeating appointments
- Tentative appointments
- New appointment screen using appointment adjustment

If you change the setting for usage of file attachment function from allow to prohibit, attachments are hidden but the attached files remain unchanged.
When you restore the function, the attached file are displayed again.

When allowing attachment of files



When attachment of file is not permitted



Steps:

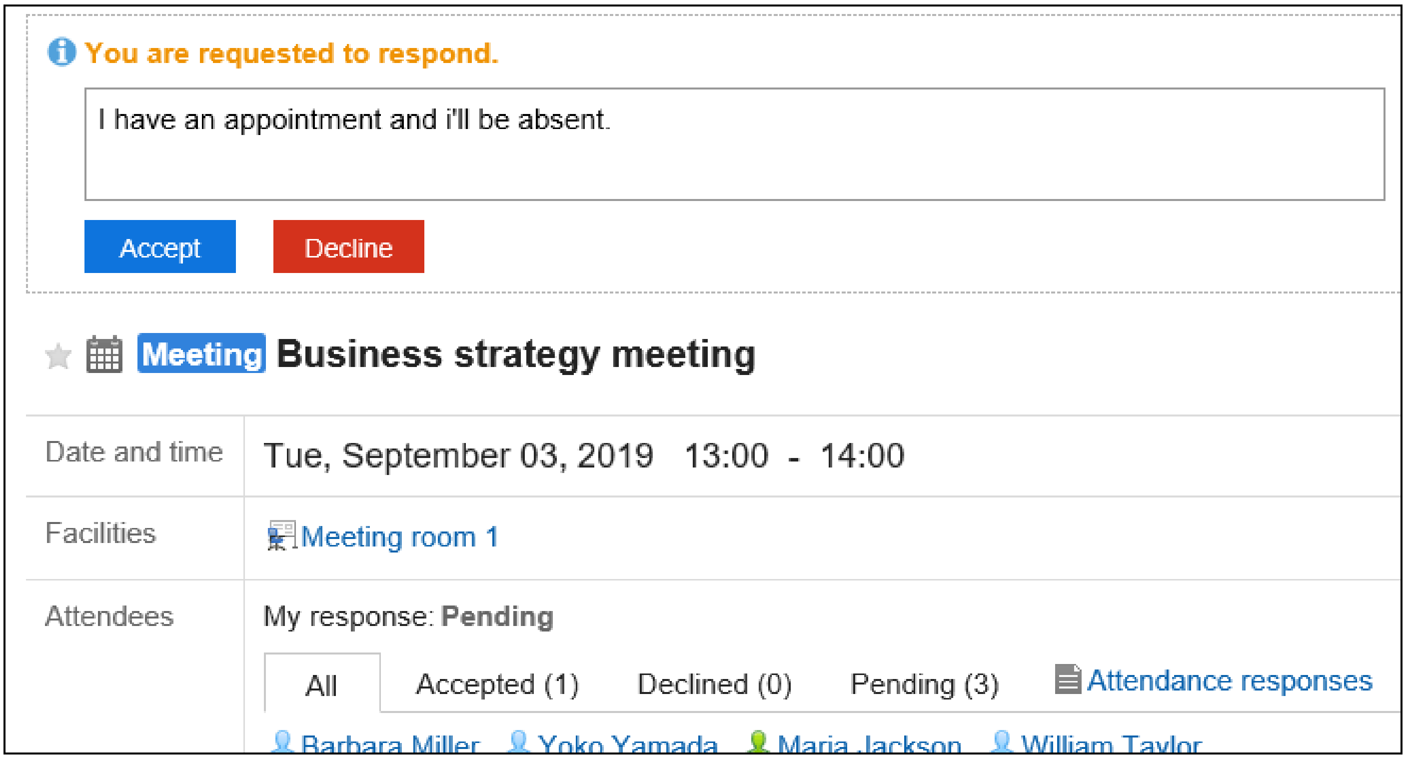
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **In the field to attach files on "General Settings" screen, select "Allow" check box.**
7. **Confirm your settings and click "Save".**

Note

- You cannot attach files on the screens to add or change appointments in KUNAI (sync mode).

Allowing the Attendance Response Request Feature

Select whether to allow users to use the response request feature.
The response request feature allows users to check attendance of attendees of an appointment. It is available only for regular appointments.
When you allow users to use response request , "Request responses" check box appears on "New appointment" screen or the screen to change appointments. By selecting the check box, you can ask ask the attendees to response for the appointment whether to accept it or not.
On the "Response request list" screen, users can check the status of their responses to attendance requests and the status of attendee responses to attendance requests they have created.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "General Settings".**
6. **On "General Settings" screen, select "Allow" check box in "Attendance" field.**
7. **If you enable the default status for "Request responses" in "Attendance" field on "New appointment" screen, select the check box for "Request responses".**

8. Confirm your settings and click "Save".

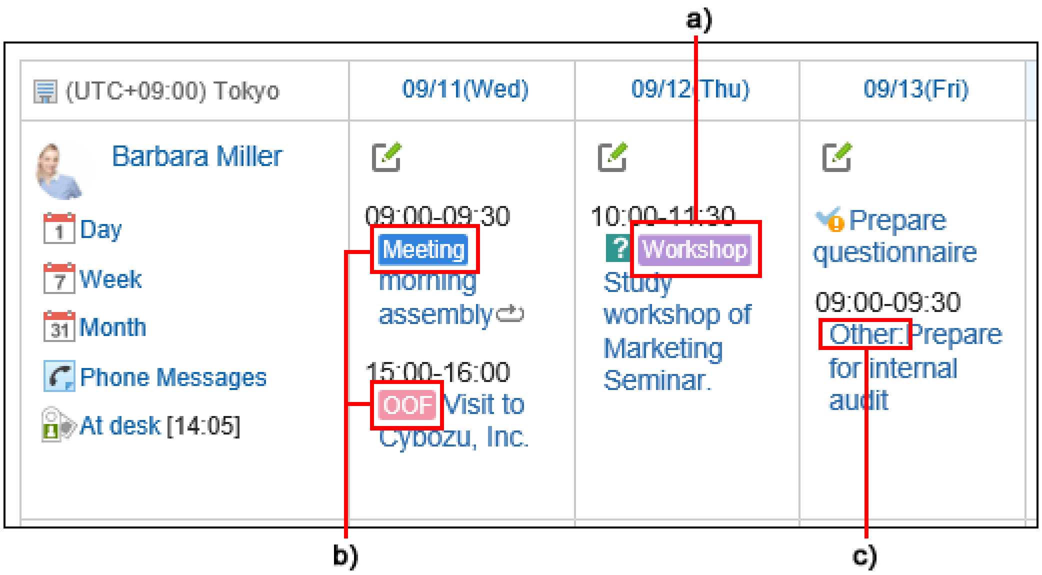
2.4.2. Setting up Appointment Types

Appointment types are strings that represent categories of the appointments shown preceding the appointment subject.

When users add an appointment, they can select the appointment type from the "Subject" field.

By using appointment types, you can easily show the type of the appointment.

For example, setting up frequently used appointment types in your company such as company-wide meetings and leaving work early makes users easily set appointments.



a): An appointment type added by administrators

b): An appointment type set by default

c): An appointment type set by users

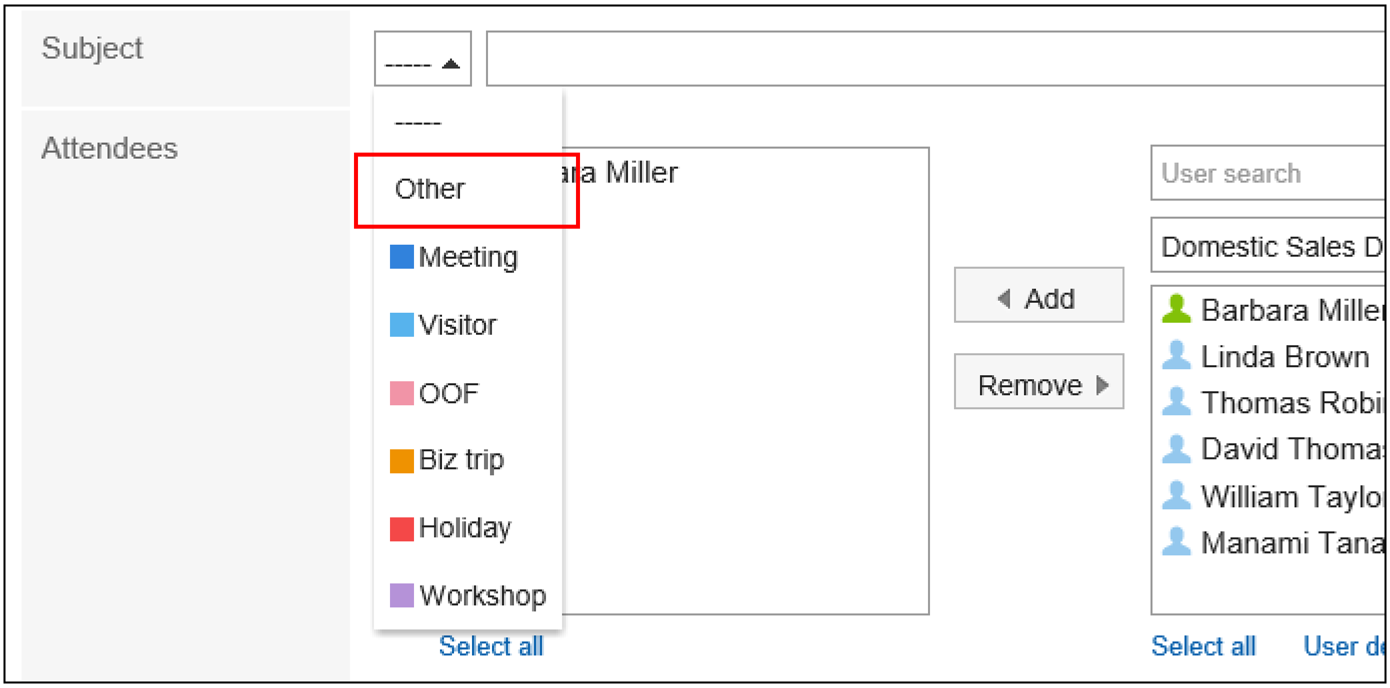
Appointment types can also be set by users.

While system administrators prepare menus for all users, users can add their own menus in a menu set by their system administrator.

For details, refer to Setting up Appointment Types in the personal settings.

Menus added by users are not displayed in the drop-down list of other users.

The appointment types added by the user is displayed above the appointment types added by system administrators.



Add Appointment Type

Set display names and background colors to be displayed for appointment types.

By default, the following appointment types are available.

- Meeting
- Visit
- Visit
- Travel
- Off

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

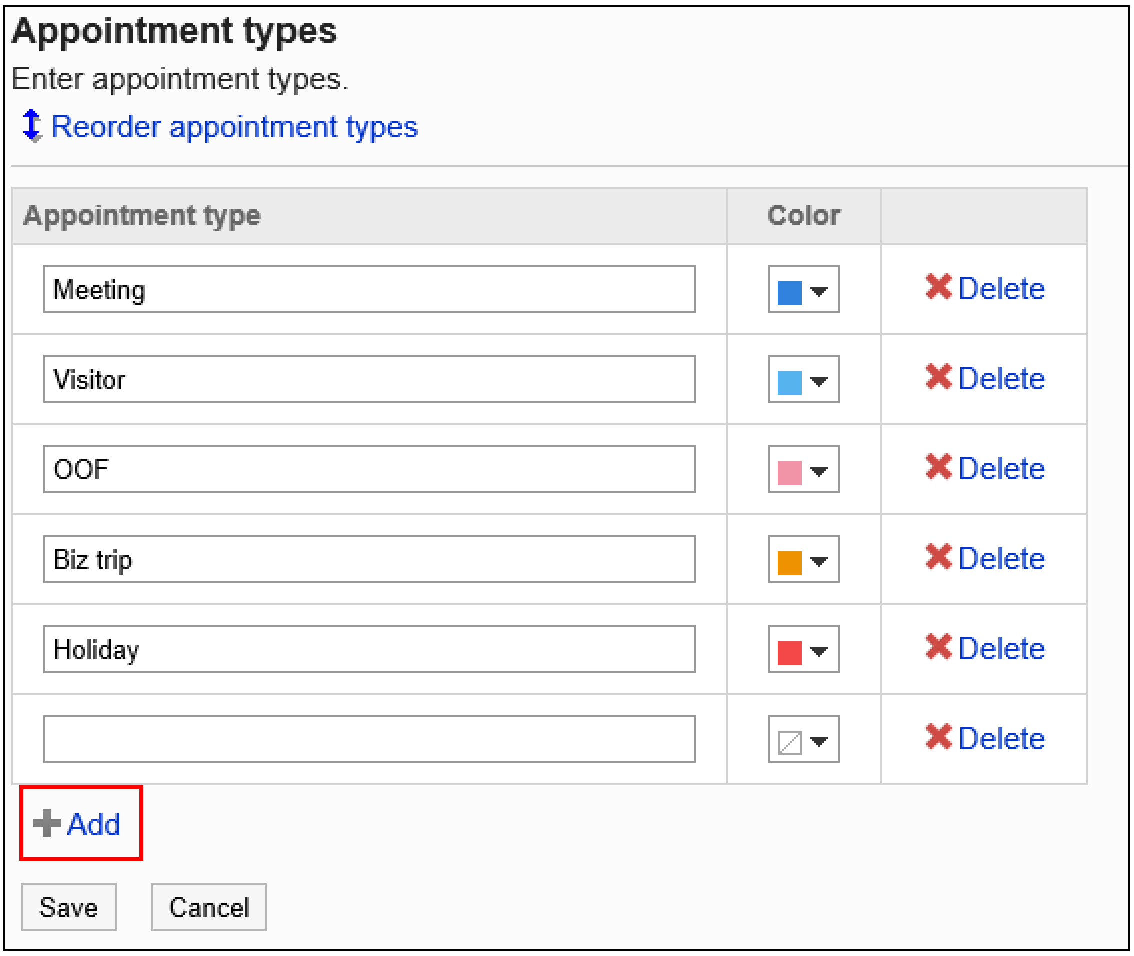
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

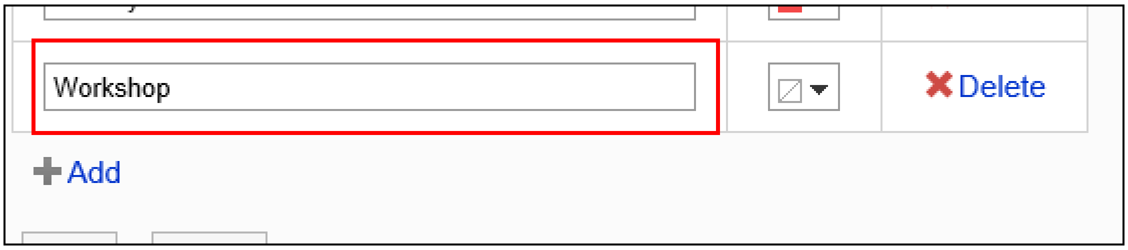
5. **Click the item to set appointment types.**

6. **On the screen to set appointment types, click "Add".**



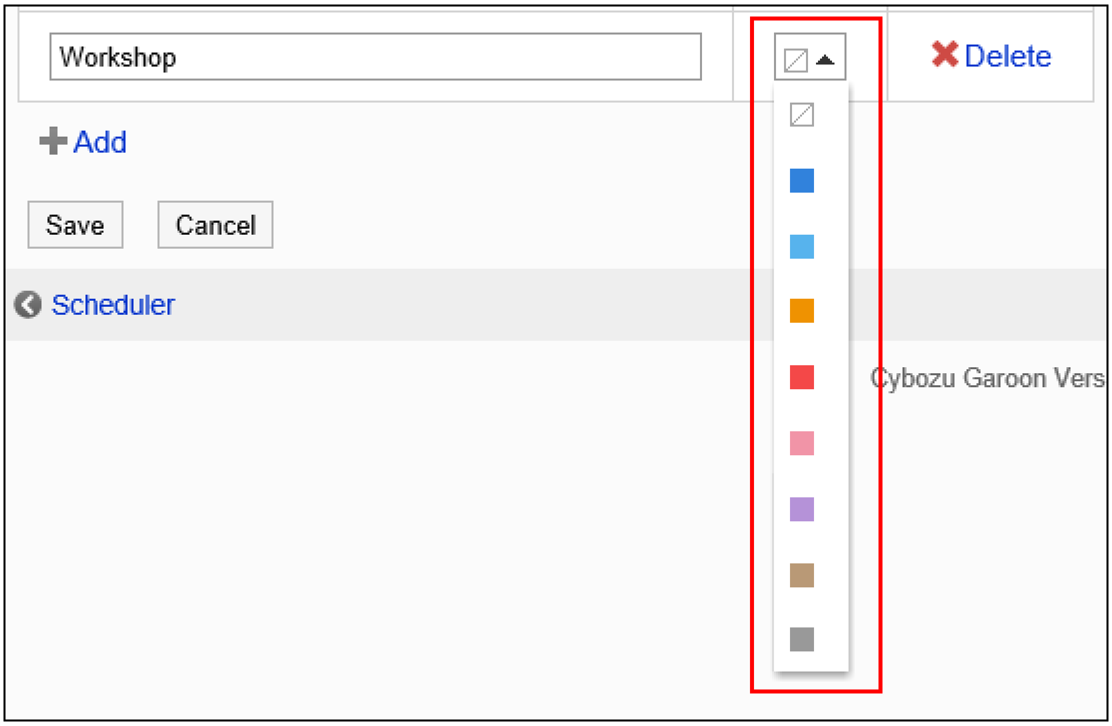
7. Enter the name of an appointment type.

You can enter codes in up to 100 characters.



8. Select a color for the background of the appointment type.

If you do not add a background color, select colorless .



9. **Confirm your settings and click "Save".**

Changing Appointment Types

Change display names and colors of appointment types.

The new names and colors are not applied to the appointment types made previously.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item to set appointment types.**

6. **On the screen to set appointment types, you can change the settings in the appointment type.**

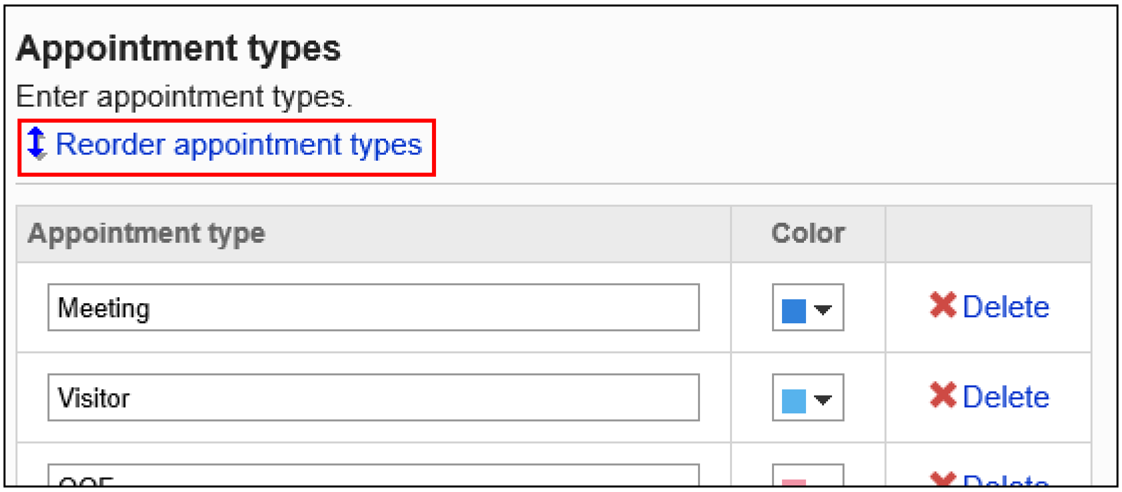
7. **Confirm your settings and click "Save".**

Reordering Appointment Types

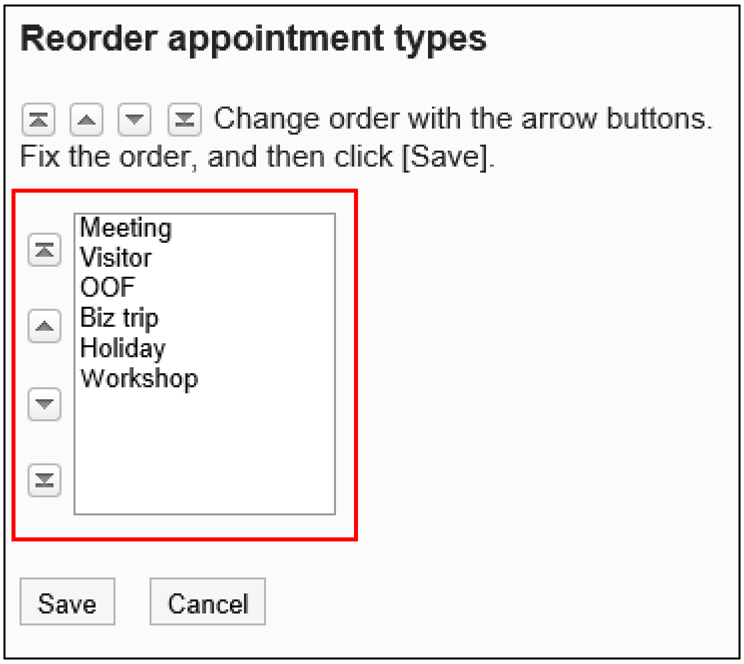
Reorder appointment types.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item to set appointment types.**
6. **On the screen to set appointment types, click "Reorder".**



7. **On the screen to reorder appointment types, reorder appointment types.**



8. **Confirm your settings and click "Save".**

Deleting Appointment Types

Delete Appointment types.

Deleting appointment types doesn't delete appointment types from appointments that have already be added.

Caution

- Once you delete appointment types, they cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

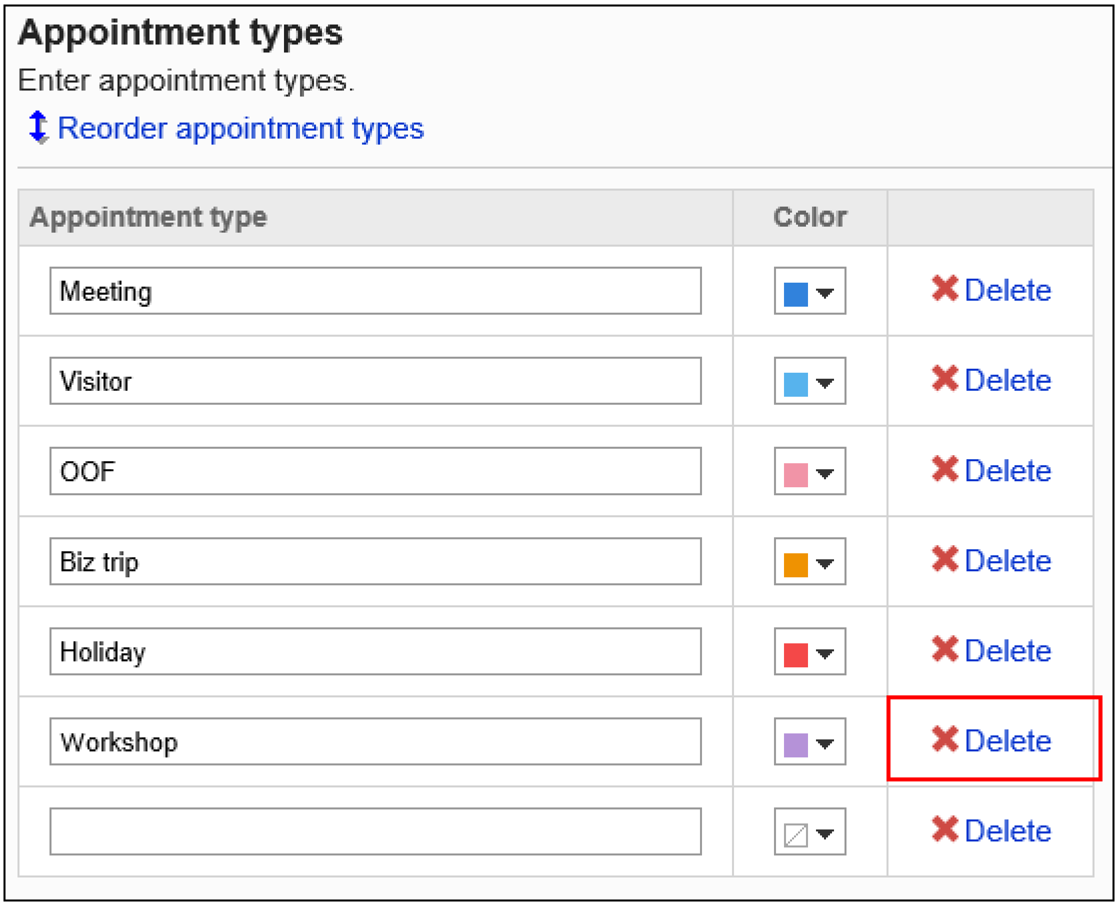
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item to set appointment types.**

6. On the screen to set appointment types, click "Delete" in the delete field.

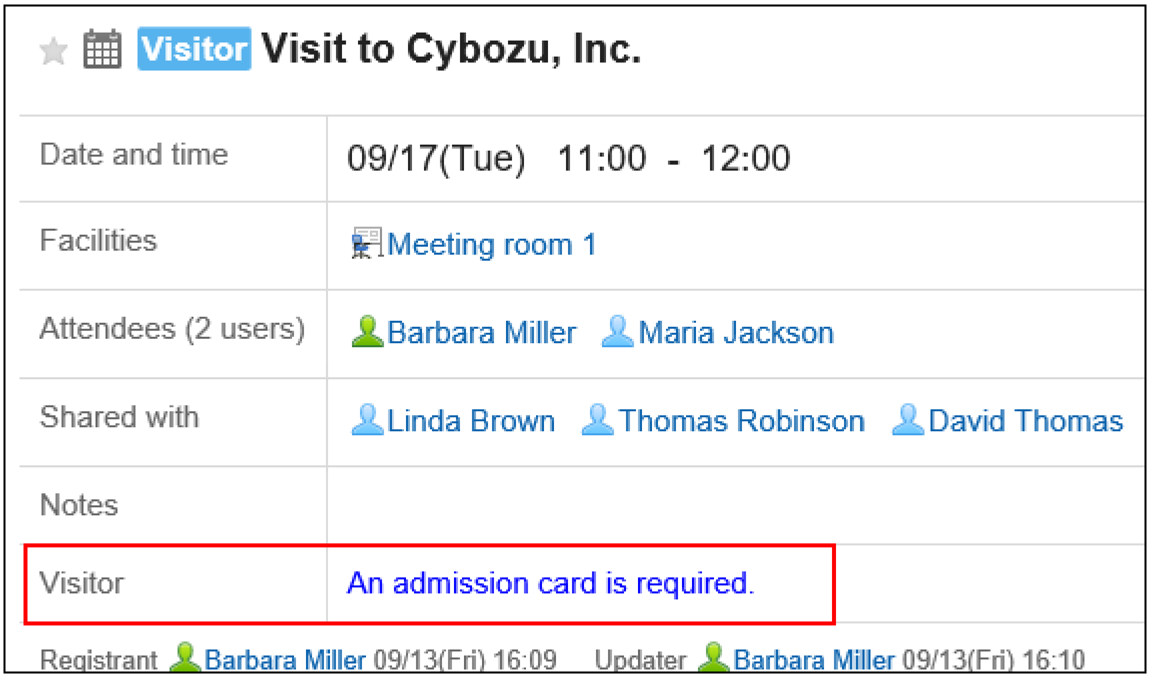


7. Confirm your settings and click "Save".

2.4.3. Setting Up Appointment Type Links

Appointment type link is a feature linking Appointment types selected while adding appointments to preset texts or images and show them in "Appointment details" screen.

If a user select an appointment type with appointment type link while entering an appointment, the appointment type filed appears on the appointment details screen.



For example, if you preset the usage of a conference room or car numbers for company cars, you can show them to users automatically while they use the appointment details screen.

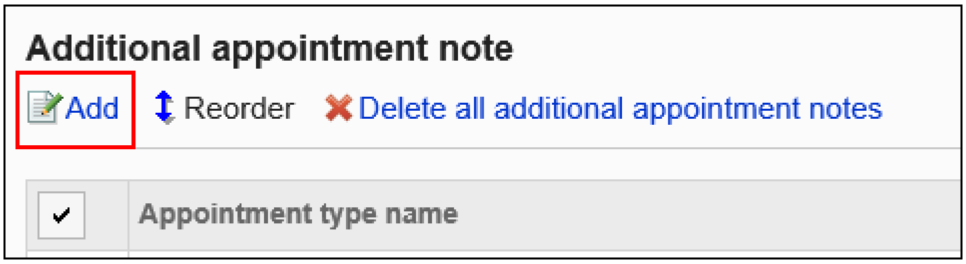
Adding Appointment Type Links

Before setting up appointment type links, you must add appointment types.
If you have set up multiple appointment type links in one appointment type, the appointment type link that you added first will be applied.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item to set appointment types and the screen for appointment types , check that the Appointment type link has been added.**
   If you do not have the appointment type you want, add it. For details, refer to Adding Appointment Types(854Page).
6. **Click the item to link appointment types.**

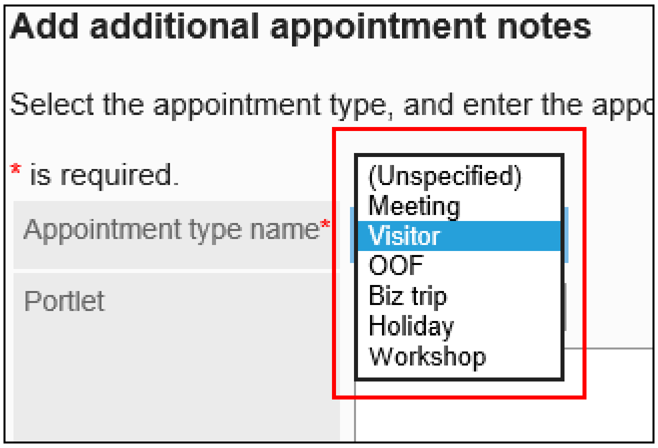
7. On the screen for appointment type links, click the item to add appointment type links.



8. On the screen to add appointment type links, set the appointment type field name.

You should set appointment type names for appoint type links.

Select the appointment type from the drop-down list.



9. Set "Portlet" field.

Enter the texts or link URLs shown in the appointment details page In HTML format.

Available Keywords

You can display user information by entering the following keywords:

Keyword	Description
%Name%	User name
%ID%	User ID used in Garoon system
%Account%	Login name
%Mail%	E-mail added to the user information
%Tel%	Contact information added in the user information
%URL%	URL added in the user information

Keyword	Description
%grn.common.login.login.extension.Code of custom item in user profile%	User information items configured in cybozu.com Administration Example: %grn.common.login.login.extension.item_01%

Unnecessary Tags

You do not need to use "html", "head", or "body" tags.

Useful Tags

ifram tags

When you show other WEB sites, the ifram tag is useful.

Example:

```
<iframe src="https://www.example.com" width="400" height="100">
An inline frame is used.
</iframe>
```

Tags for Default Settings

If you select "Comment" from the drop-down list in "Portlet" field, the default tags and sample texts are entered.

Default settings:

```
<font color="blue">You can add comments here. </font>
```

10. Confirm your settings and click "Add".

Changing Appointment Type Links

Change settings for appointment type links.

Changing settings for appointment type links updates the contents displayed in the appointments that are added before the change.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item to link appointment types.**
6. **On the screen for appointment type links, click the appointment type name to change the appointment type link.**
7. **On the screen for appointment type link details, click "Edit".**

8. **On the screen to change appointment type links, change the settings as necessary.**
9. **Confirm your settings and click "Save".**

Reordering Appointment Type Links

Change the order of appointment type links displayed on the appointment type link screen in system administration. The order of appointment type links does not affect user screens.

Note

- If you have set up multiple appointment type links in one appointment type, the appointment type link that you added first will be applied.
  Changing the display order of appointment type links does not change the order in which the appointment types are applied.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

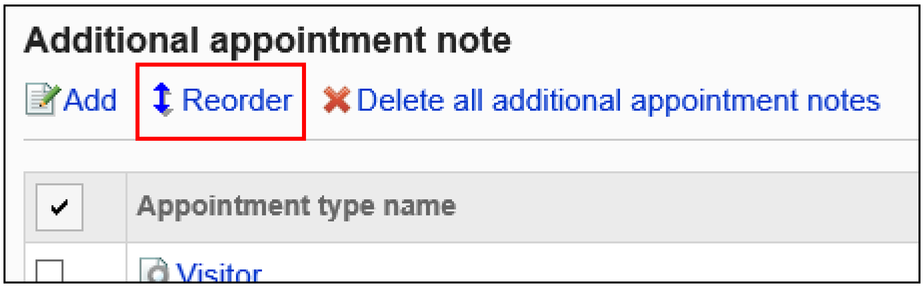
2. **Click "System settings".**

3. **Select "Application settings" tab.**

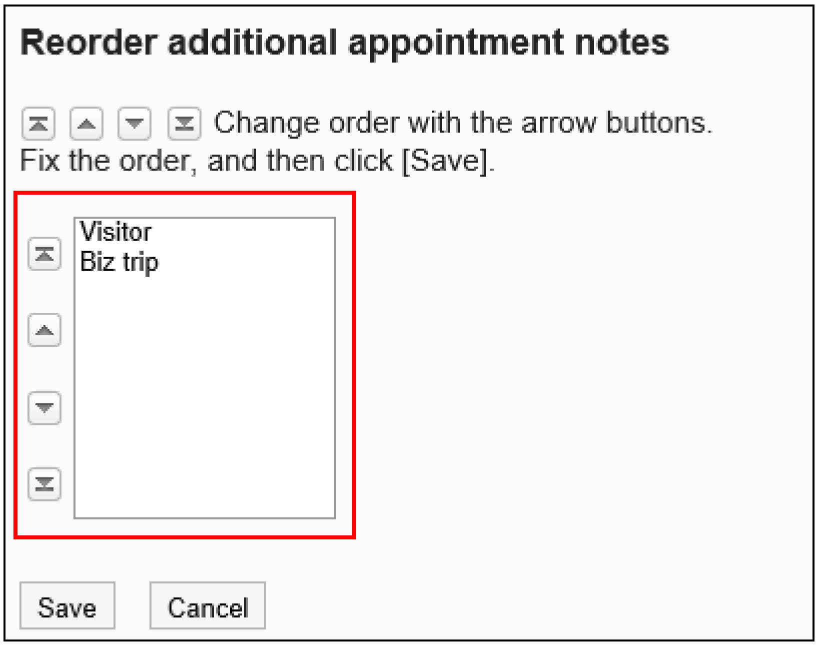
4. **Click "Scheduler".**

5. **Click the item to link appointment types.**

6. **On the screen for appointment type links, click to reorder appointment type links.**



7. **On the screen to reorder appointment type links, you can reorder appointment type links.**



8. **Confirm your settings and click "Save".**

Deleting Appointment Type Links

Delete added appointment type links.

Caution

- Once you delete appointment type links, they cannot be restored.

Note

- If you have set up multiple appointment type links for one appointment type, then you delete the first appointment type link, the second appointment type link will be applied.

Deleting Appointment Type Links One by One

Delete appointment type links one by one.

Steps:

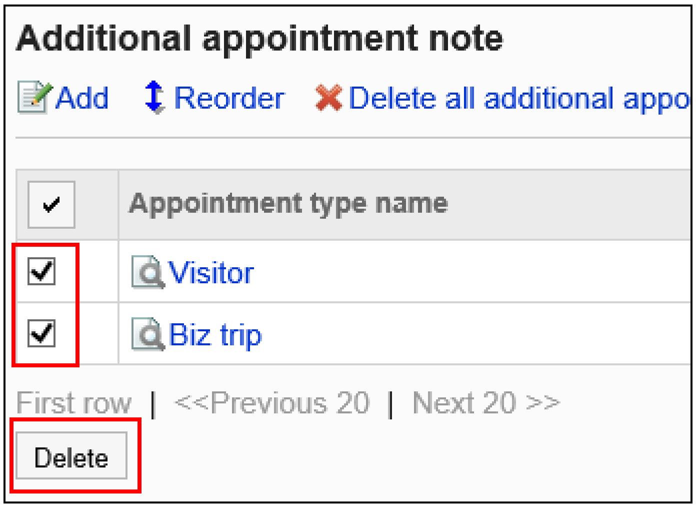
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item to link appointment types.**
6. **On the screen for appointment type links, click the appointment type name of the appointment type link to delete.**
7. **On the screen for appointment type link details, click Delete.**
8. **Click "Yes" on "Delete" screen.**

Deleting Multiple Appointment Type Links in Bulk

Delete multiple appointment type links at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item to link appointment types.**
6. **On the screen for appointment type links, select the check box of the appointment type to delete, and then click "Delete".**



7. **Click "Yes" on the screen to delete all appointment type links at once.**

Deleting All Appointment Type Links

Delete all appointment type links.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item to link appointment types.**

6. **On the screen for appointment type links, click the item to delete all appointment type links.**

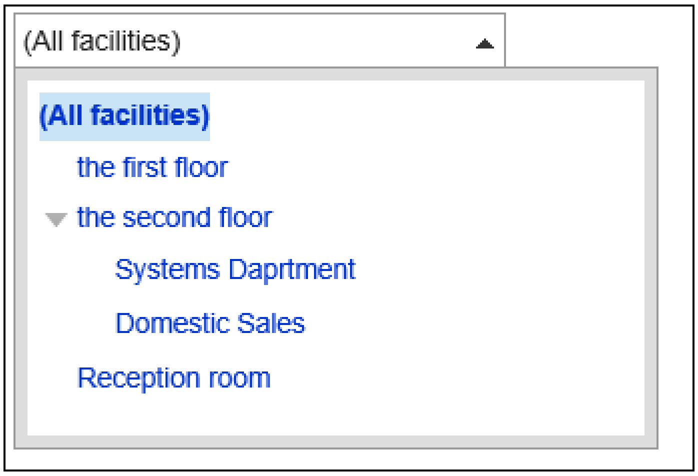
7. **Click "Yes" on the screen to delete all appointment type links.**

2.4.4. Facility Group Settings

Facility groups are groups that are grouped facilities by purpose.

When users add an appointment, they can select a facility group in the facility field.

A facility group has up to three levels.



Adding Facility Groups

Add a facility group.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

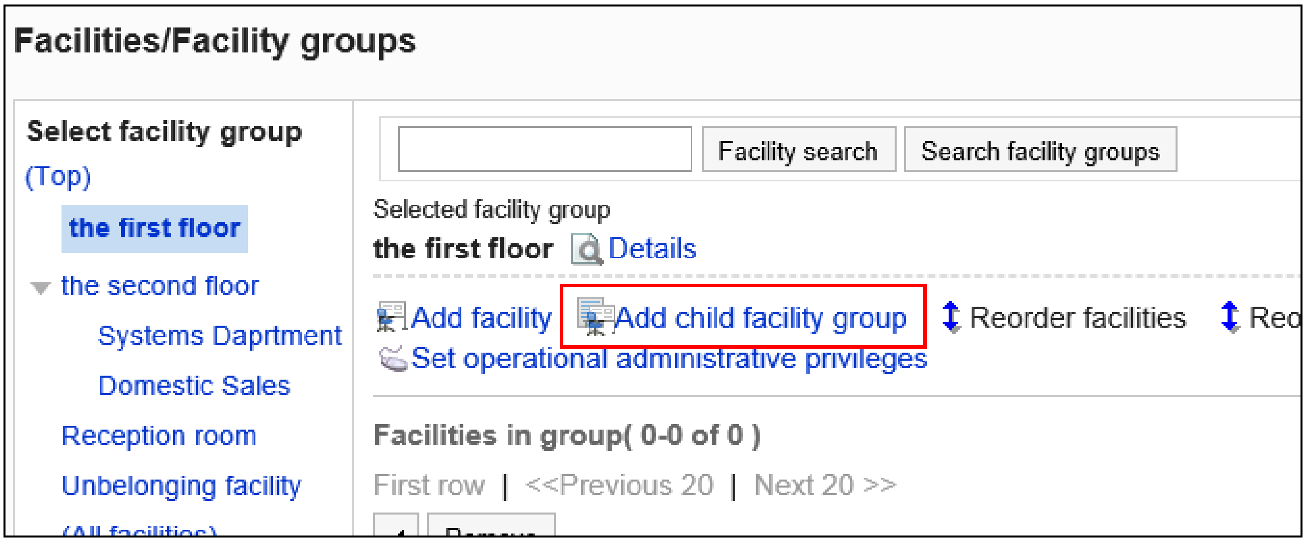
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click the item to add child facility groups.**

You cannot add facility groups to the fourth level.



7. **On the screen to add facility groups, enter the name of the group.**

You should set the default group name.

Clicking "Add localized name" allows you to set facility group names in multiple languages.

If you do not set the facility group name in the user preference language, the default group name is displayed.

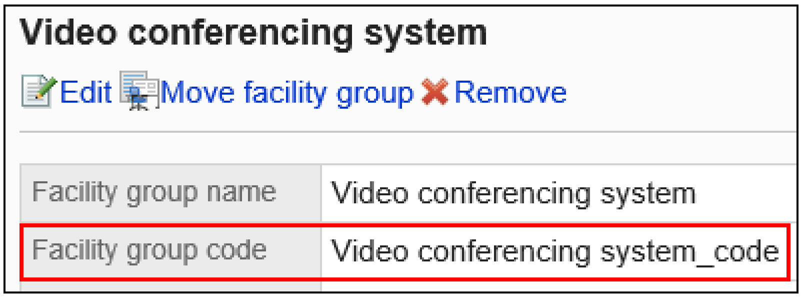
The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese
  Displayed in Traditional Chinese.

8. **Enter a code for the facility group code filed.**

This is a unique code for identifying a facility group.

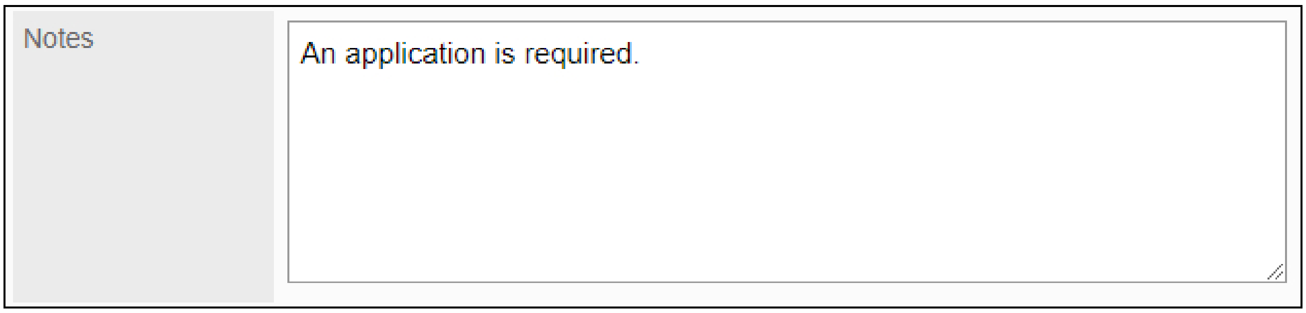
If you do not enter it, "(facility group name)_code" is set automatically. When the code is overlapped with other facility groups, a sequential number is added before "_code".



9. **Set the Notes field as necessary.**

Enter a description of the facility group.

The details entered in the notes are not displayed on the user's screen.



10. **Confirm your settings and click "Add".**

Changing Facility Groups

Change settings of a facility group.

To change the parent facility group field, refer to the instruction in Moving Facility Groups(870Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

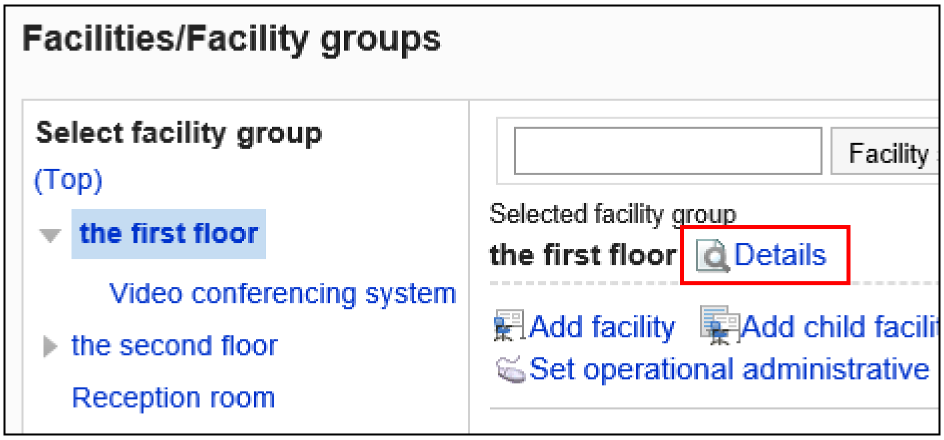
2. **Click "System settings".**

3. **Select "Application settings" tab.**

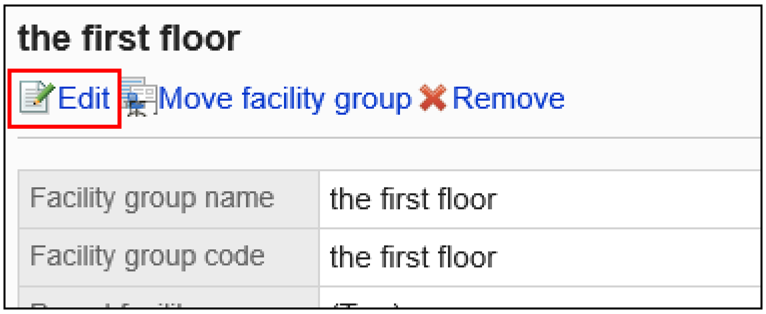
4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click the item to show the details.**



7. **On the facility group details screen, click "Save".**



8. **On the screen to change facility groups, you can change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Moving Facility Groups

Move facility groups to other facility groups.

If they have child facility groups, the children are also moved with the groups.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

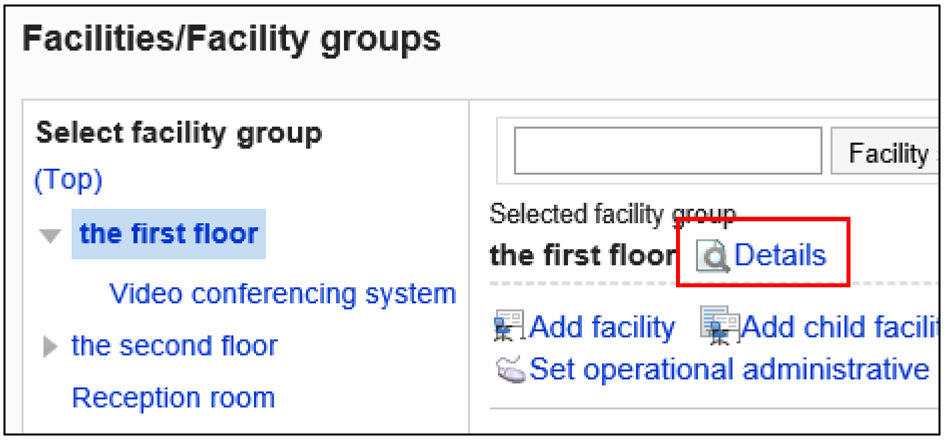
2. **Click "System settings".**

3. **Select "Application settings" tab.**

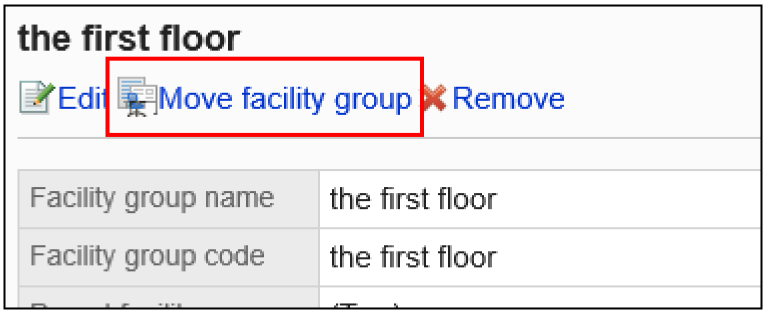
4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click the item to show the details.**



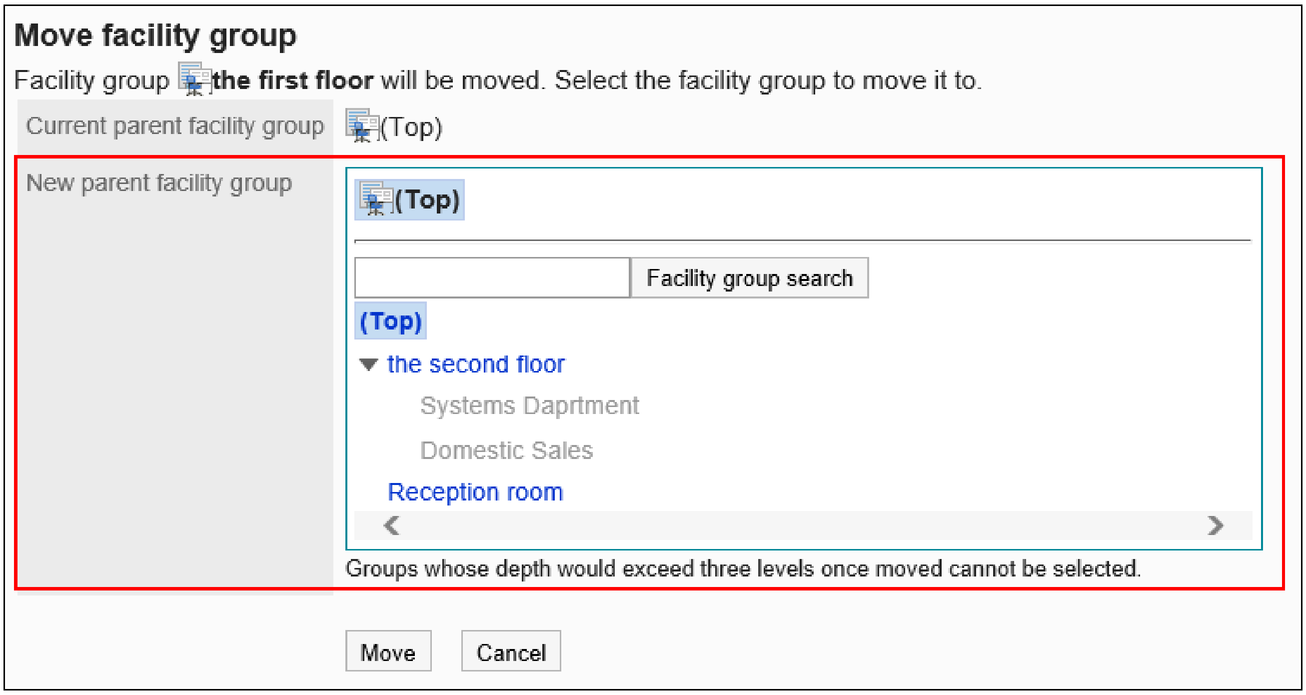
7. **On the facility group details screen, click to move facility groups.**



8. **On the field for target parent facility groups on the screen to move facility groups, select a facility group to move to.**

   You can search for facility groups to move facilities into by entering keywords and clicking to search facility groups.

   Clicking a facility group name moves to the facility group you clicked.



9. **Confirm your settings and click "Move".**

Reordering Facility Groups

Reorder facility groups that are displayed when you reserve facilities.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

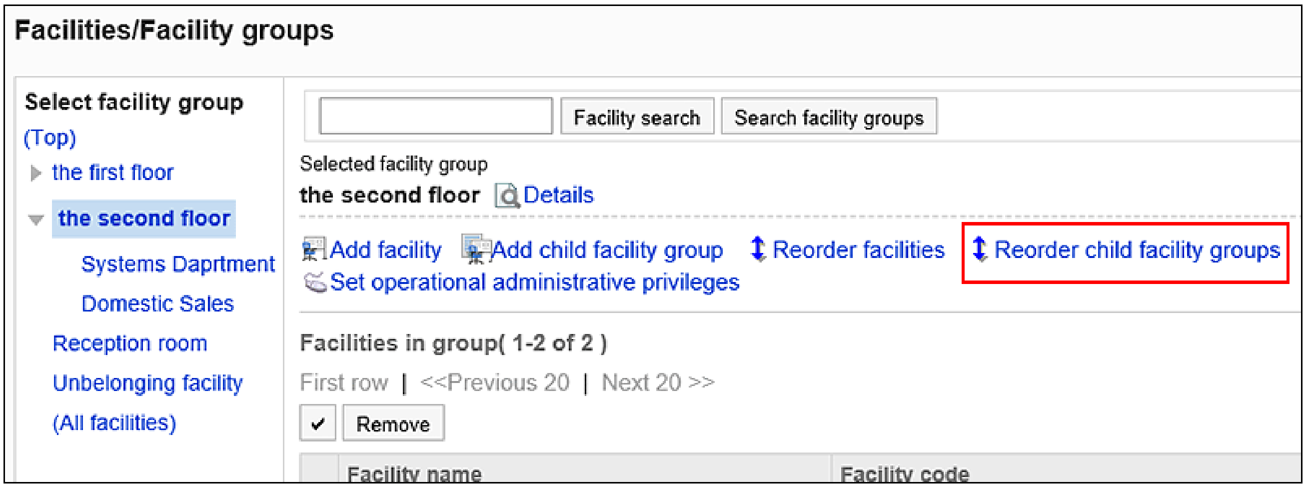
2. **Click "System settings".**

3. **Select "Application settings" tab.**

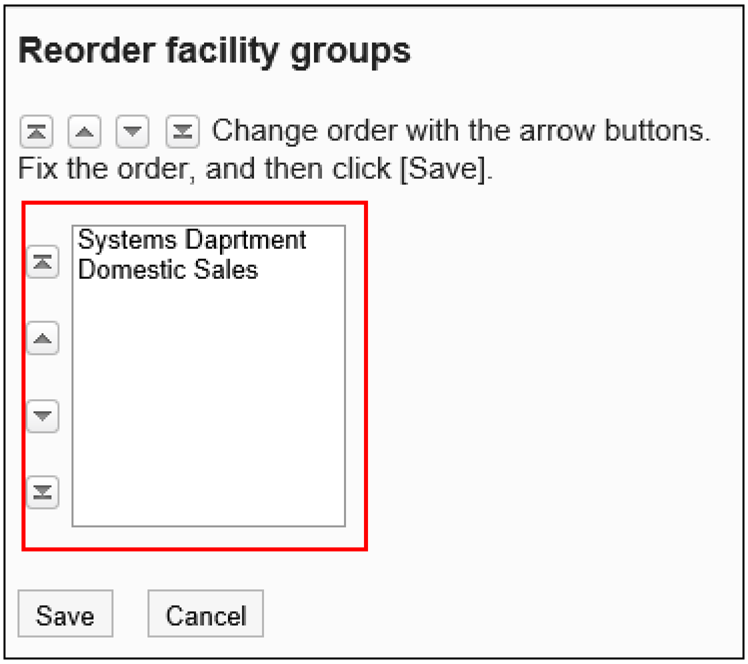
4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click the item to reorder child facility groups.**



7. **On the screen to reorder facility groups, reorder facility groups.**



8. **Confirm your settings and click "Save".**

Deleting Facility Groups

Delete facility groups. Deleting a facility group also deletes all child facility groups.

Caution

- Once you delete facility groups, they cannot be restored.

Note

- Deleting a facility group does not delete facilities belonging to it.
- Facilities that the facility groups they belonged were deleted are moved to the list for facilities not belonging to any facility groups.

Steps:

1. Click the administration menu icon (gear icon) in the header.

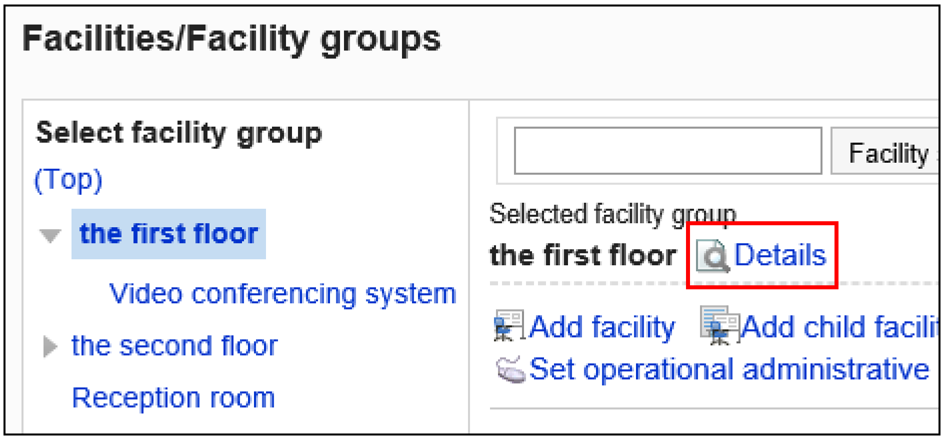
2. Click "System settings".

3. Select "Application settings" tab.

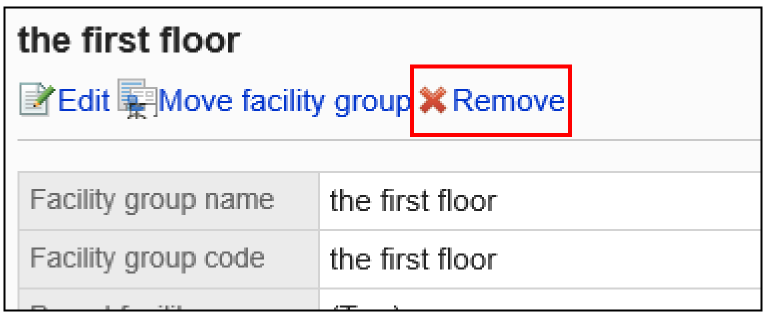
4. Click "Scheduler".

5. Click the item for facilities or facility groups.

6. On the screen for facilities or facility groups, select a facility group, and then click the item to show the details.



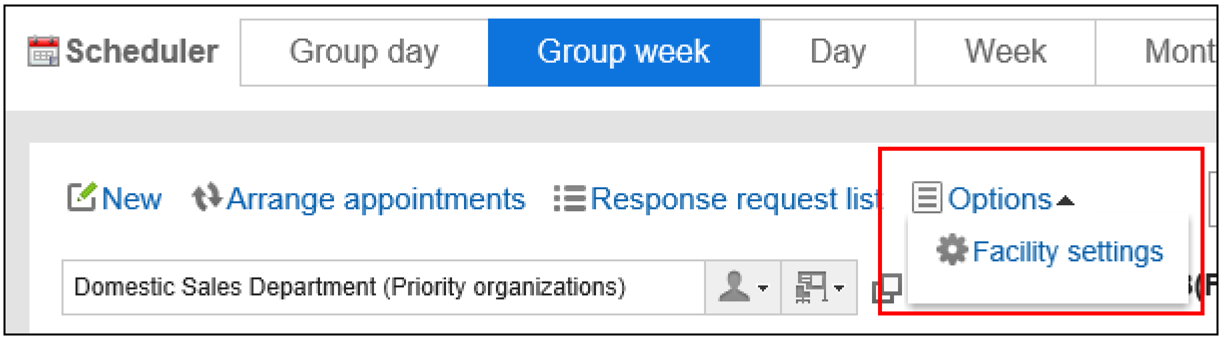
7. On the facility group details screen, click "Delete".



8. **Click "Yes" on the delete facility groups screen.**

2.4.5. Setting up Operational Administrative Privileges for Facility Groups

Operational administrators are administrators who are granted operational administrative privileges to manage facility groups by the system administrator.
After being assigned as an operational administrator of the facility, you will be able to see "Options" on the Scheduler screen and manage facilities or facility groups for which you have permission.



Operational administrators can do the following tasks:

- Configure facilities or facility groups:
  For details, refer to the following section:
  Facility settings(880Page)
  Setting up Facility Groups(867Page)
- Process facility usage requests:
  If the "Facility usage request" is enabled, you can process the facility usage requests submitted by the users.
  For details, refer to Facility usage request.

The operational administrators are not affected by the limitations configured for facility reservations, including the period allowed for making reservations and the maximum hours allowed for a reservation.
For details, refer to Changing Facility Reservation Settings(890Page).

Adding Operational Administrative Privileges

Grant operational privileges for each facility group.
Operational administrative privileges are inherited to child facilities or child facility groups.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

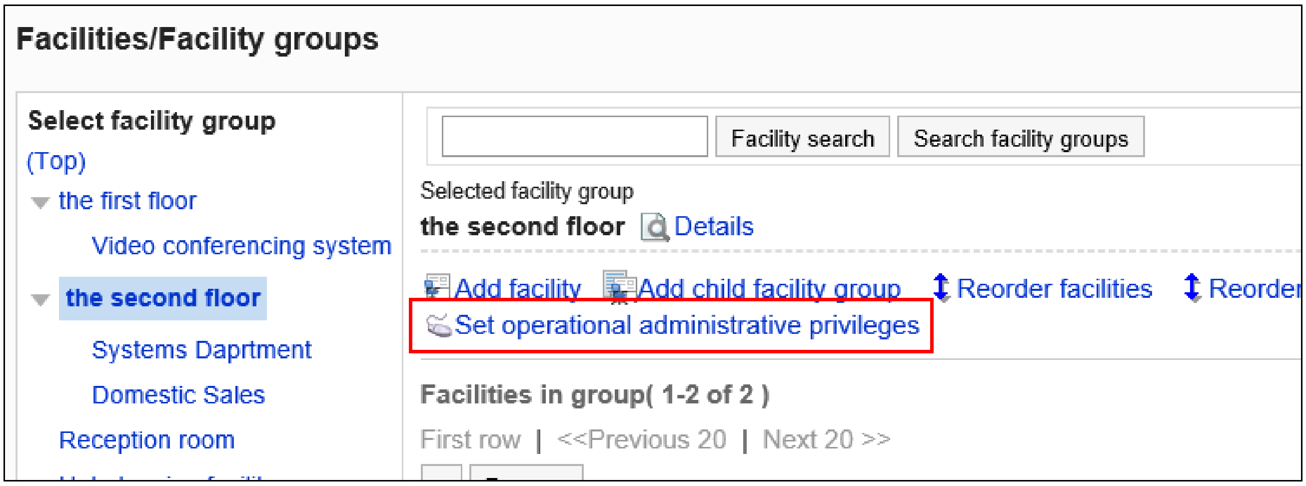
2. **Click "System settings".**

3. **Select "Application settings" tab.**

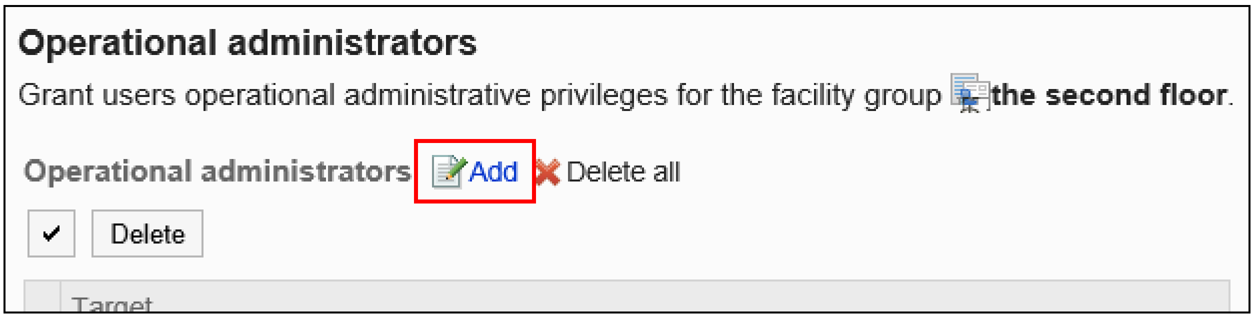
4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

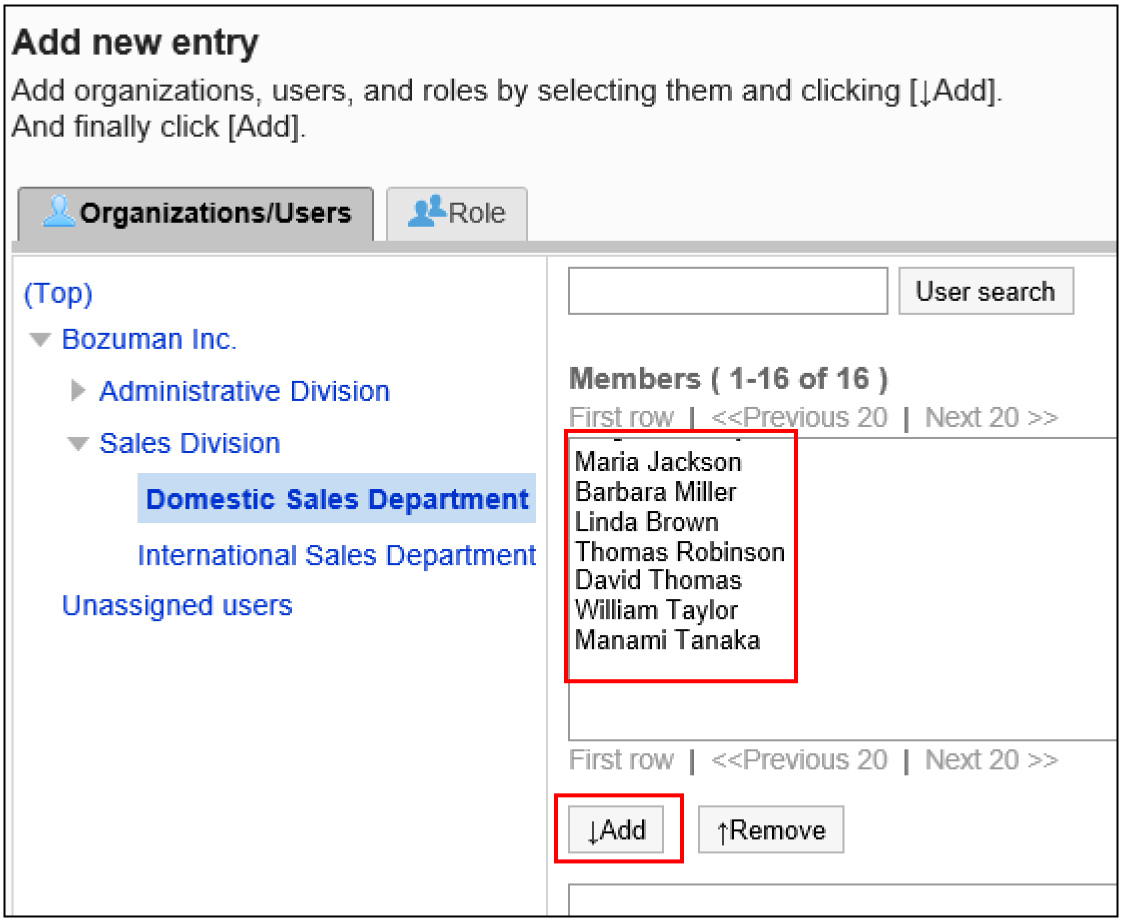
6. **On the screen for facilities or facility groups, select a facility group, and then click "Set operational administrative privileges".**



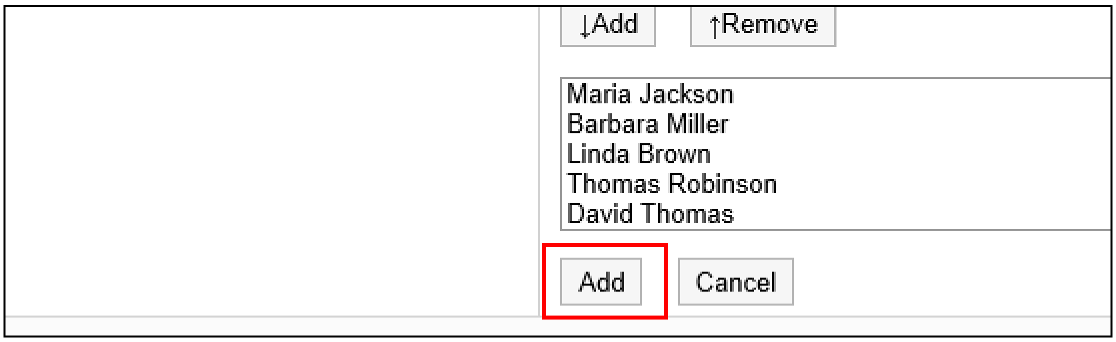
7. **On the screen for operational administrative privilege list, click "Add".**



8. **On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".**
   To select a role, switch the view to the Roles tab.
   When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. **Confirm your settings and click "Add".**



Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

Caution

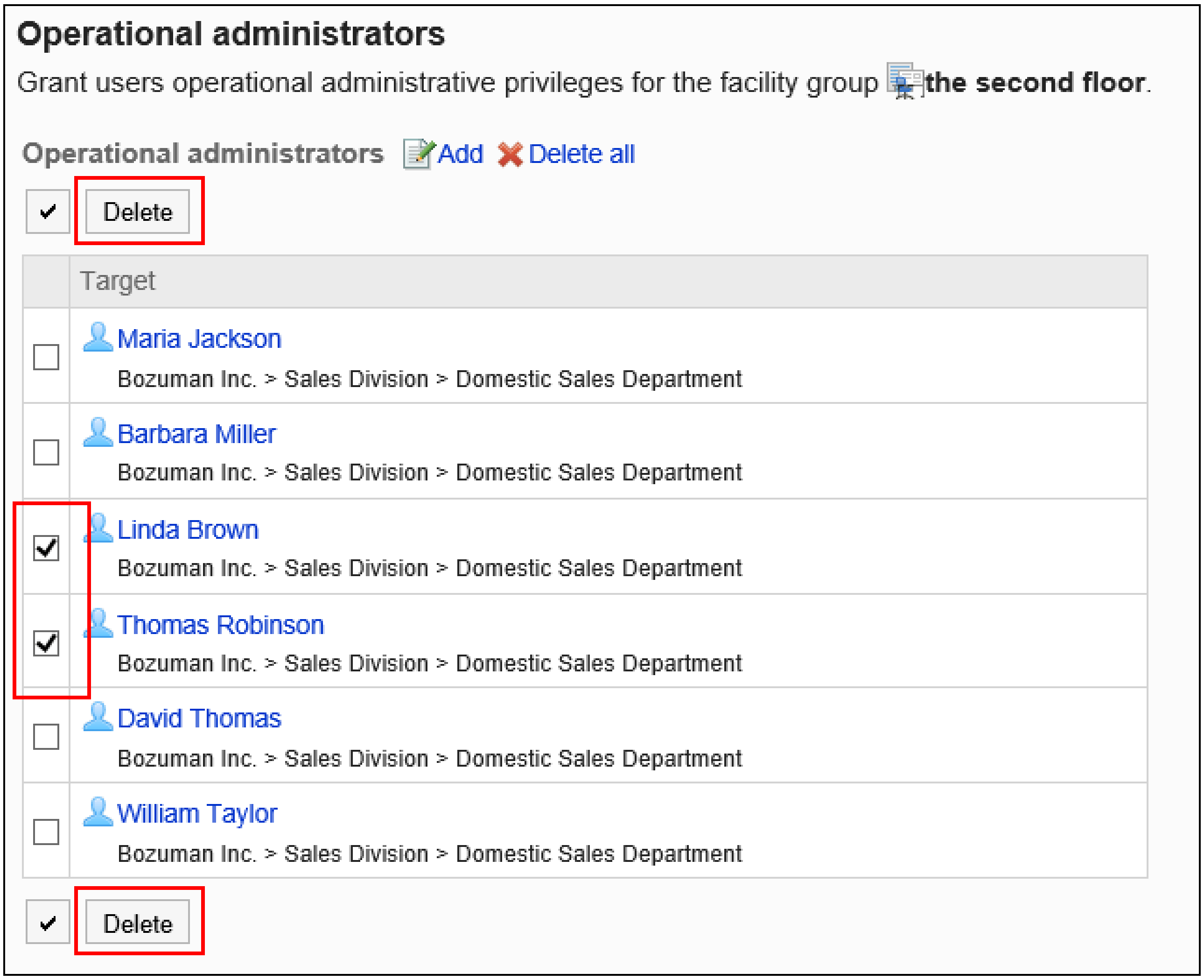
- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item for facilities or facility groups.**
6. **On the screen for facilities or facility groups, select a facility group, and then click "Set operational administrative privileges".**
7. **On the screen for operational administrative privilege list, select the check boxes of the operational administrative privileges to delete, then click "Delete".**



8. **Click "Yes" on the screen to delete all operational administrative privileges.**

Deleting All Operational Administrative Privileges

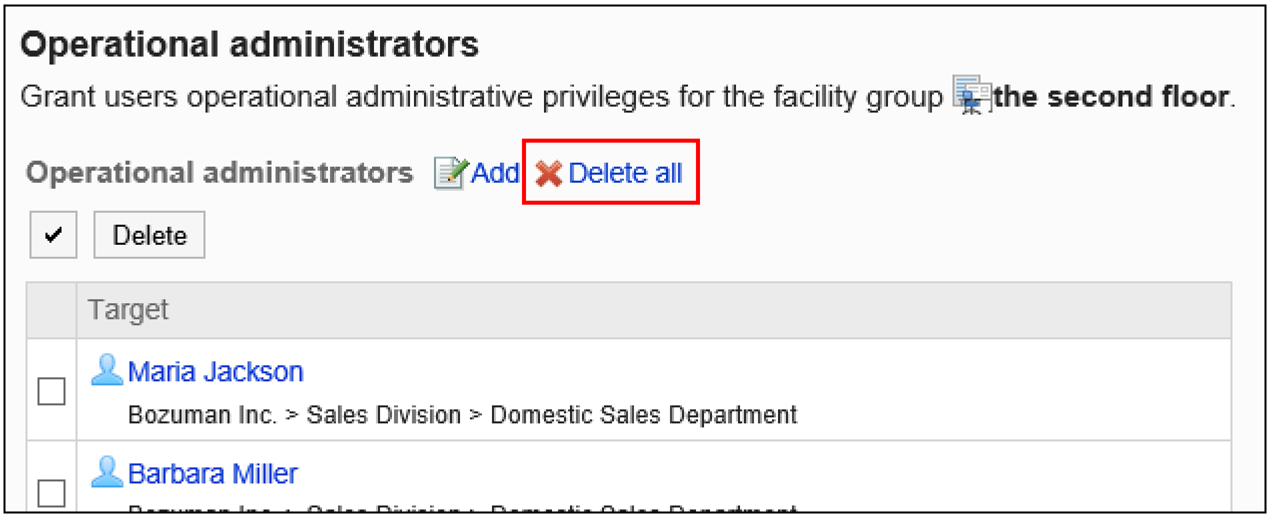
Delete all operational administrative privileges.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click "Set operational administrative privileges".**

7. **On the screen for List of operational administrative privileges, click "Delete all".**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.4.6. Facility Settings

This section describes the settings for using facilities on schedulers.

Adding Facilities

Add facilities. You can specify facility groups where the facility belongs.

A facility can belong to only one facility group.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

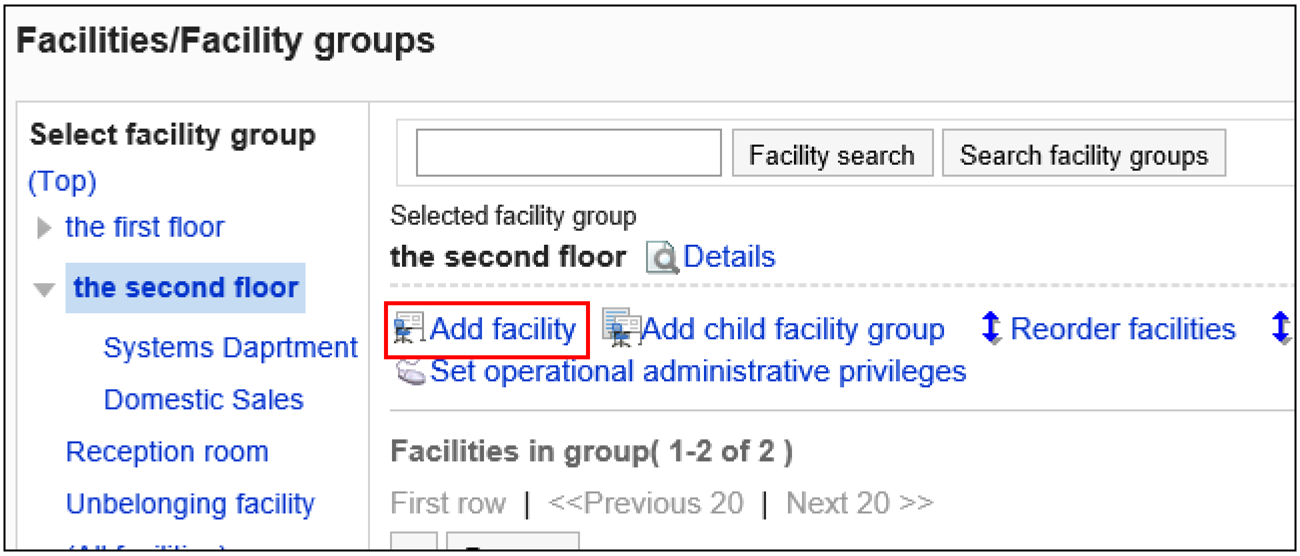
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click the item to add facilities.**



7. **On the screen to add facilities, enter the name of the facility.**

You should set the facility name.

Clicking "Add localized name" allows you to set facility names in multiple languages.

If you do not set the facility name in the user preference language, the default facility name is displayed.

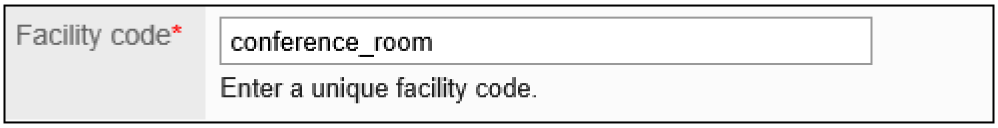
The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese
  Displayed in Traditional Chinese.

8. **Enter the facility code field.**

You should set a facility code for a facility.

This is a unique code for identifying a facility.



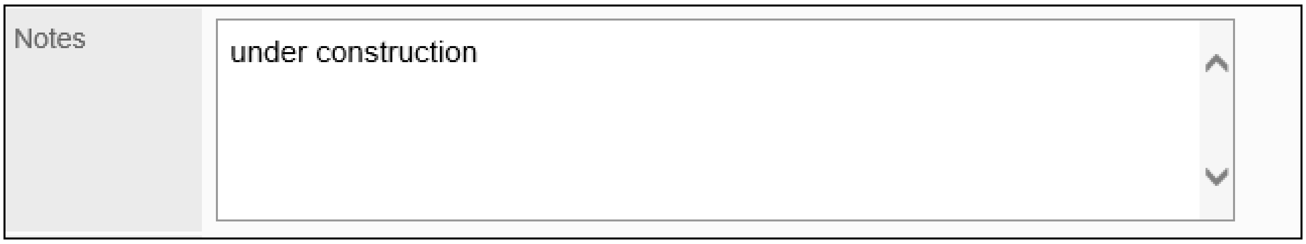
9. **Set the Notes field as necessary.**

Enter a description of the facility. The contents entered in the Notes field are displayed on the facility details page of the user.

You can use HTML tags to describe notes in the Notes field. However, you cannot use "script" tags.

When you add new lines, use "br" tags.

You do not need to use "html", "head", or "body" tags.



10. **If you add Web conference rooms, set the V-CUBE Meeting Support field and the maximum number of users allowed item.**

For details on V-CUBE Meetings, refer to Settings up V-CUBE Meetings(920Page).

11. **Confirm your settings and click "Add".**

Changing Facilities

Change facility settings.

To change the parent facility group field, refer to Changing Facility Groups to Belong(889Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

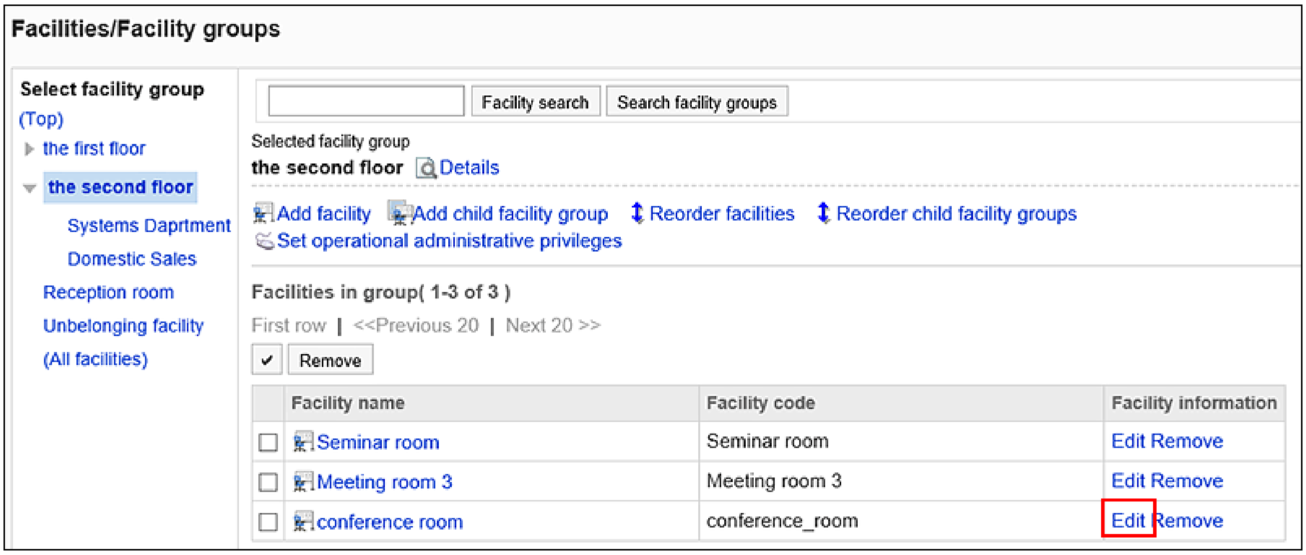
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group, and then click the item to change for the facility to change.**

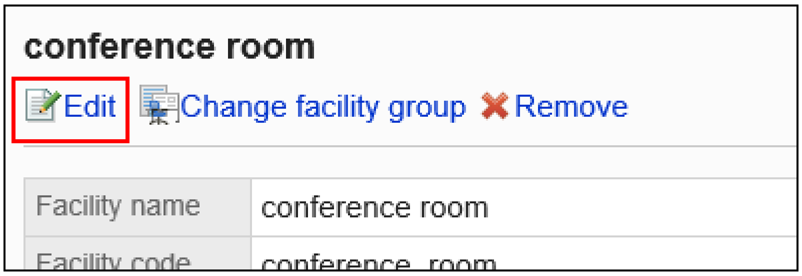


7. **On the screen for changing facility information, you can change the settings as necessary.**

8. **Confirm your settings and click "Save".**

Note

- On the screen for facilities or facility groups, you can change the facility details by clicking the facility name of the facility to change and clicking "Change" on the "Facilities" page.



Changing Facility Groups Where the Facility Belongs

Change a facility group where the facility belongs.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

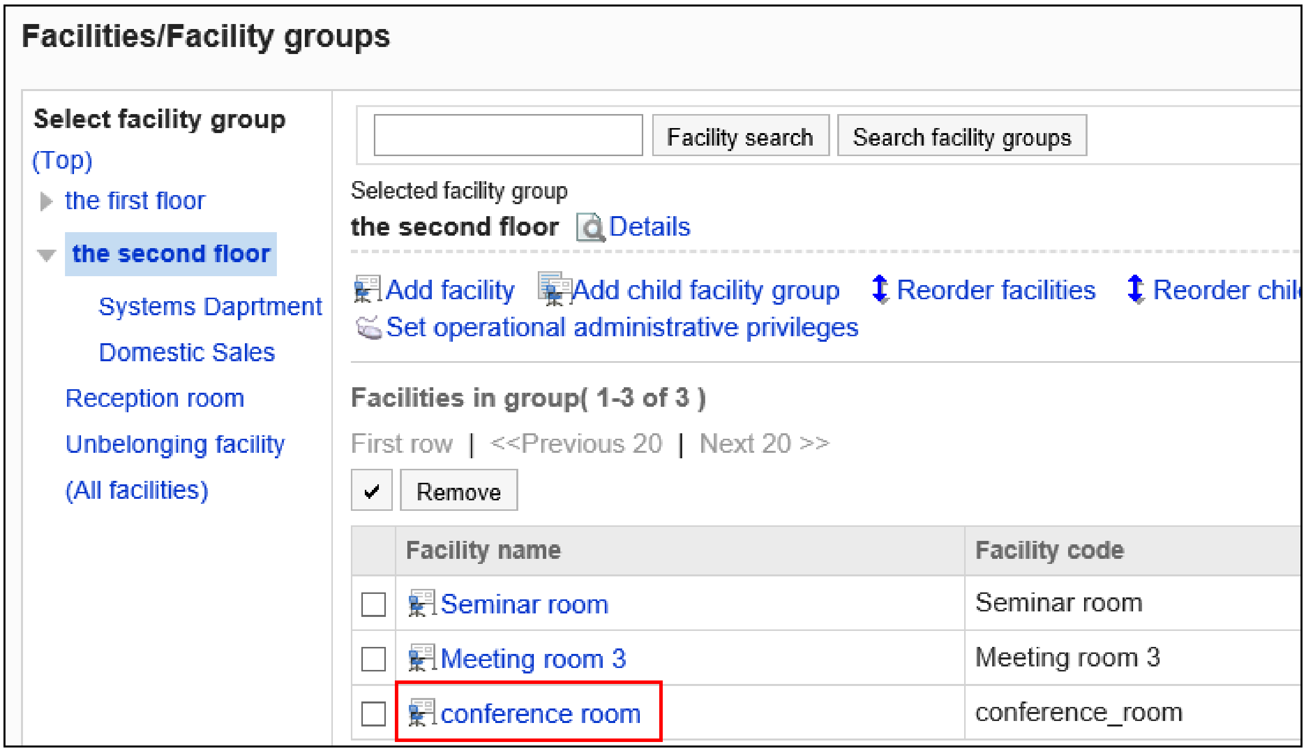
2. **Click "System settings".**

3. **Select "Application settings" tab.**

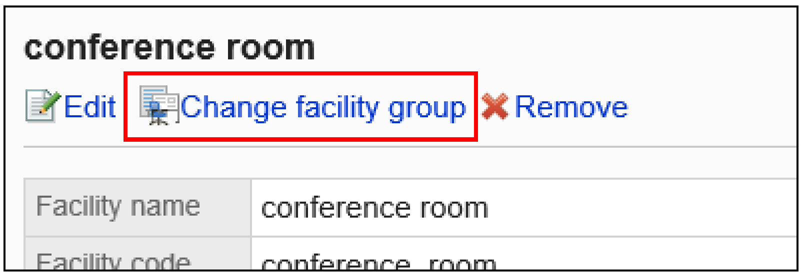
4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group and click the facility name of the facility to change its facility group to belong to.**



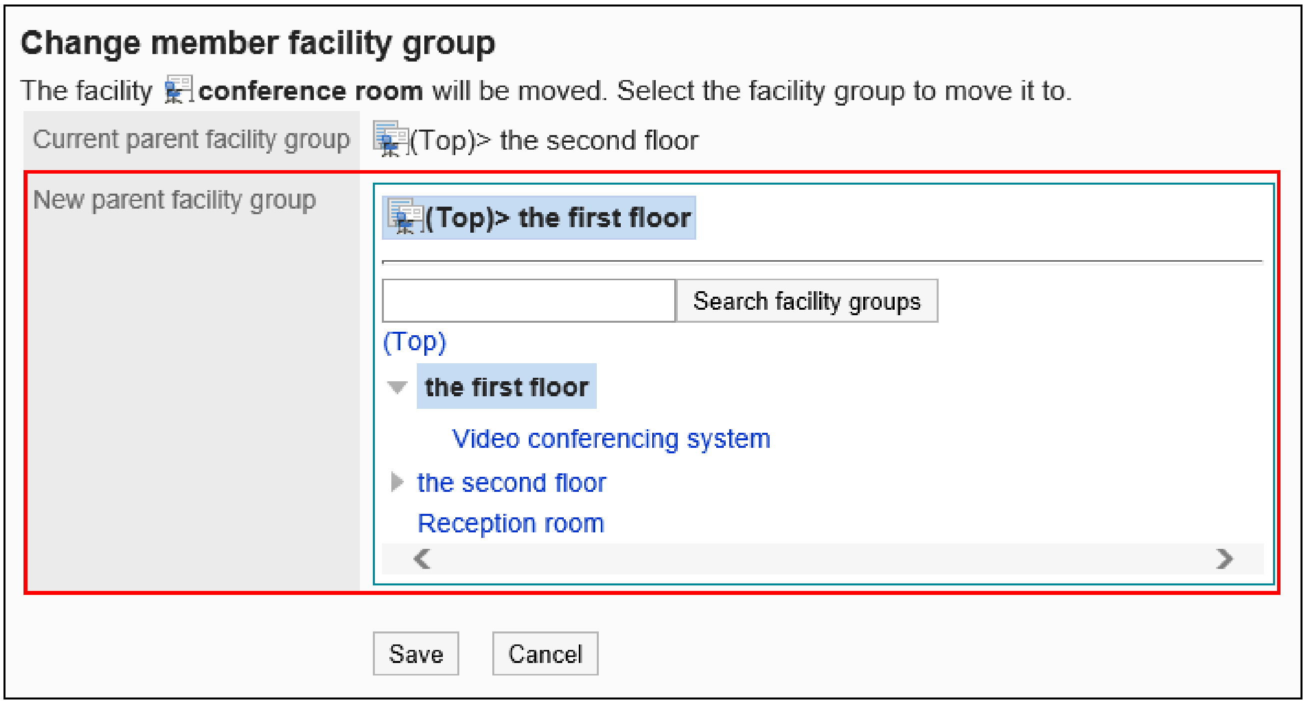
7. **On the facility details screen, click the item to change the facility group.**



8. **On the screen for changing a facility group to belong, select a facility group to move to on the parent facility group item.**

You can search for facility groups to move facilities into by entering keywords and clicking to search facility groups.

Clicking a facility group name moves to the facility group you clicked.



9. **Confirm your settings and click "Save".**

Removing Selected Facilities from Facility Groups

Remove facilities from the facility group to which they belong.

The facilities removed from the group are moved to the list for facilities not belonging to any facility groups.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

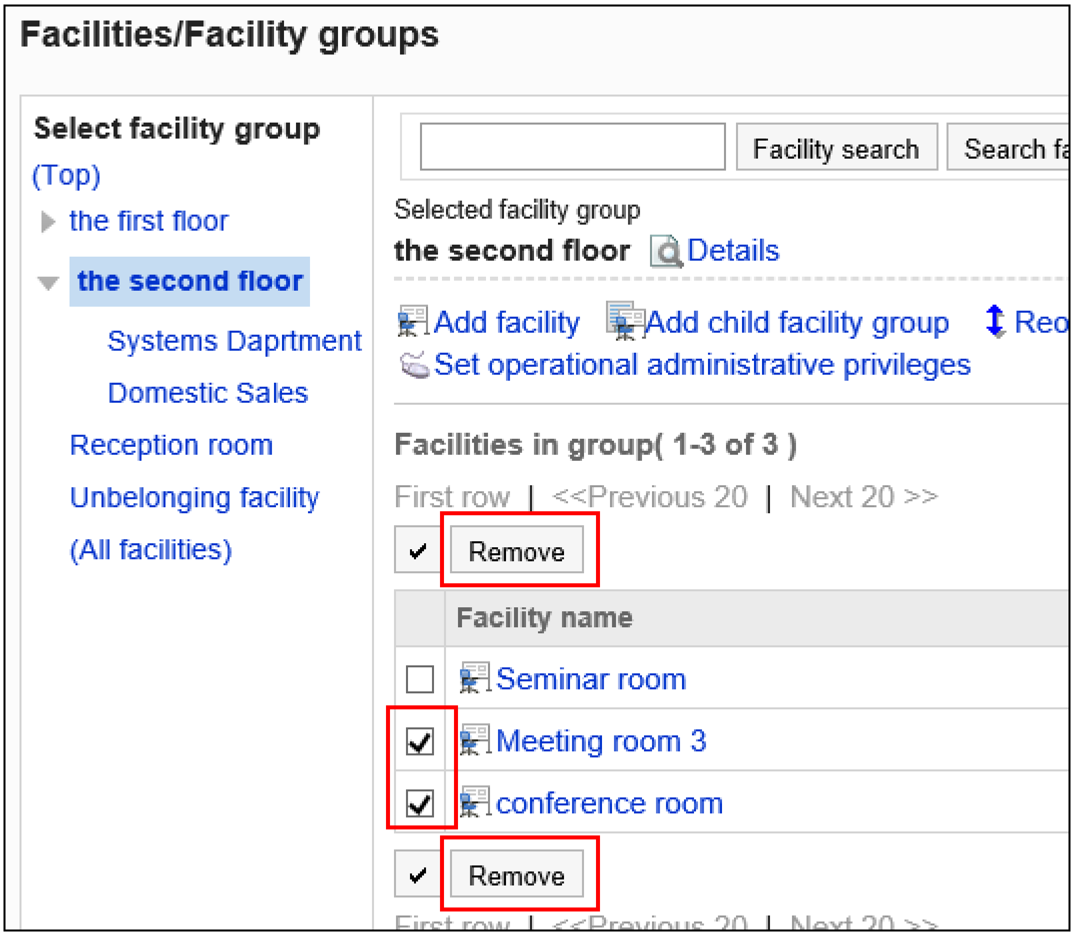
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. **On the screen for facilities or facility groups, select a facility group.**

7. **Select the check box for the facilities to remove from the group, and click to remove from the facility group.**



8. **Click "Yes" on the delete all facilities screen.**

Reordering Facilities

Reorder facilities in a facility group.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

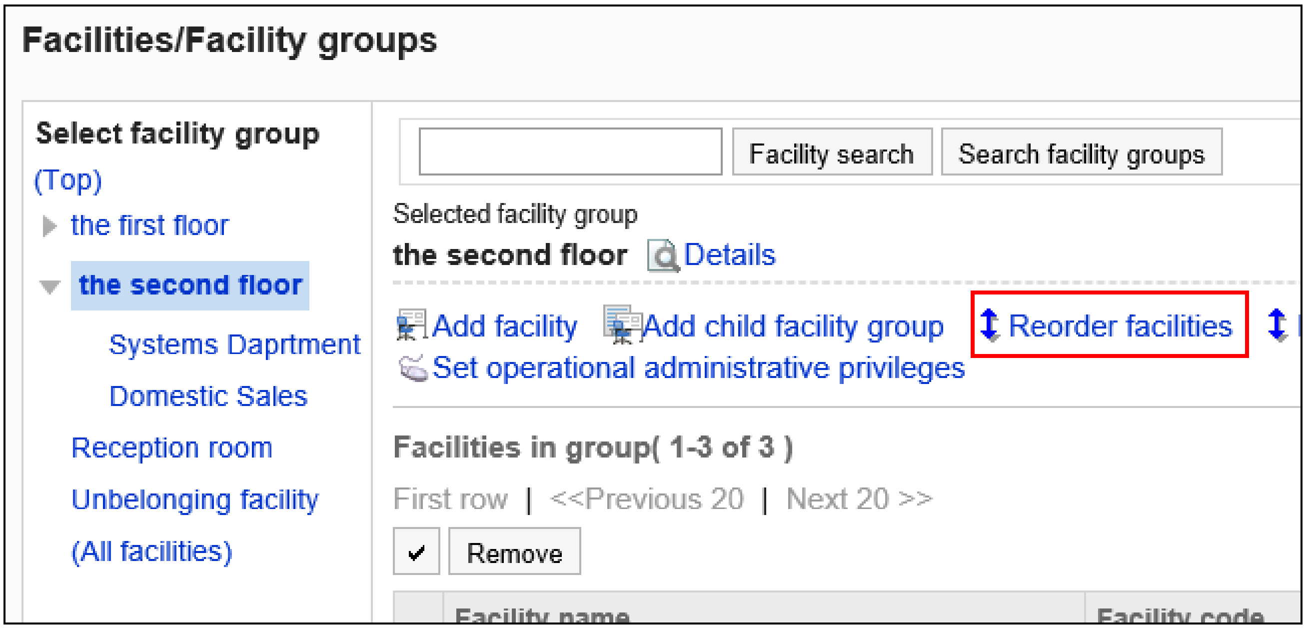
2. **Click "System settings".**

3. **Select "Application settings" tab.**

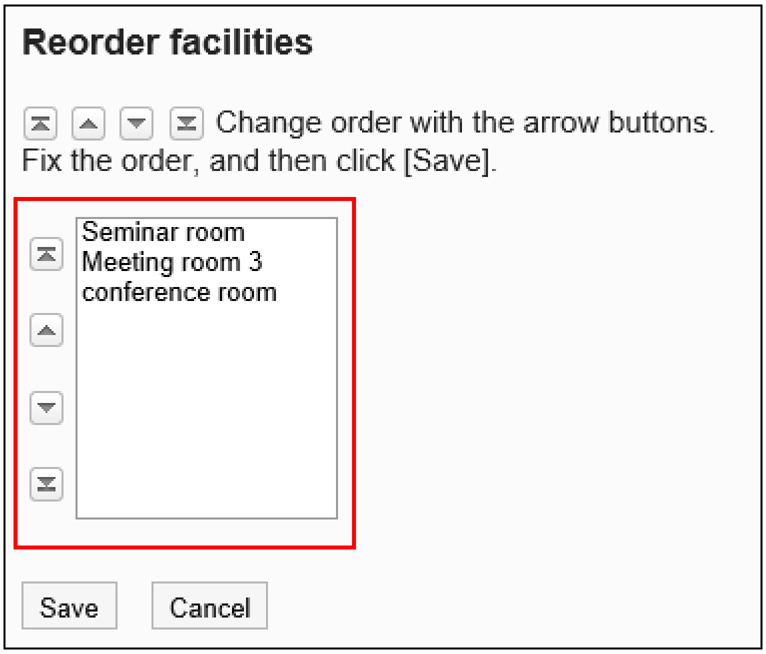
4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

6. On the screen for facilities or facility groups, select a facility group, and then click the item to reorder facilities.



7. Change the order of facilities on the reorder facilities screen.



8. Confirm your settings and click "Save".

Removing Facilities One by One

Remove registered facilities one by one. The facility reservation is canceled from the appointment that has the reservation for the deleted facility.

Caution

- Once you delete facilities, they cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

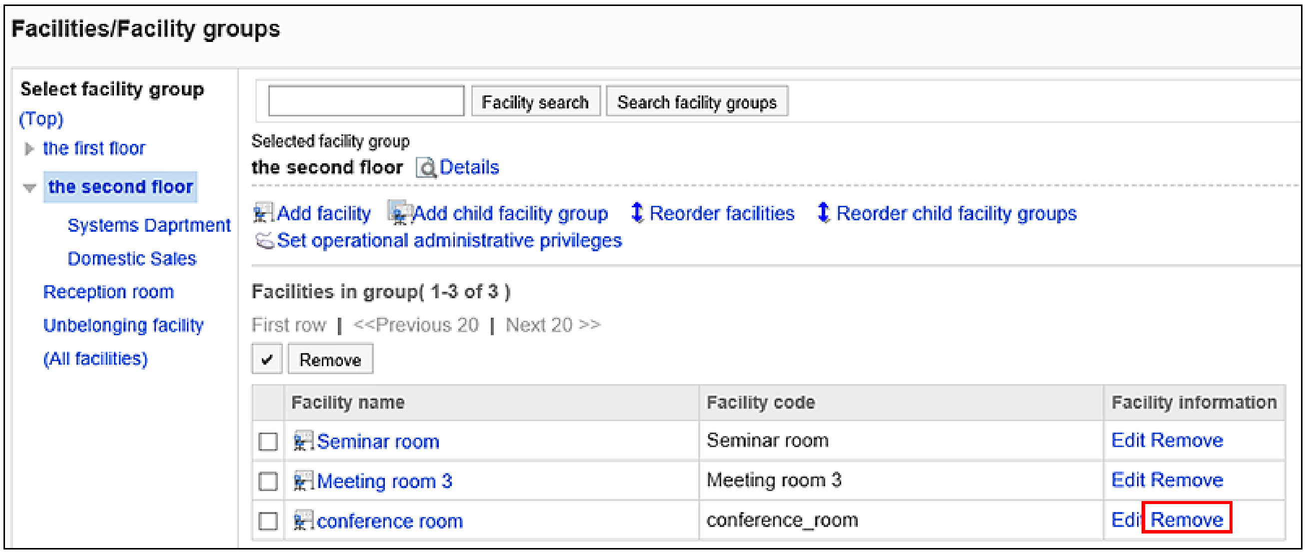
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facilities or facility groups.**

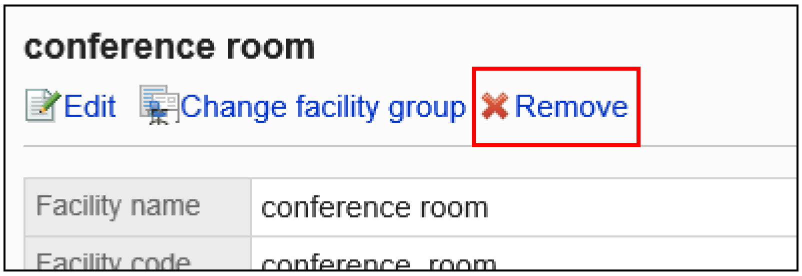
6. **On the screen for facilities or facility groups, select a facility group, and then click the item to delete for the facility to delete.**



7. **Click "Yes" on the page to remove facilities.**

Note

- On the screen for facilities or facility groups, you also can delete the facilities by clicking the facility name of the facility to delete and clicking "Delete" on the facility details screen.



Deleting Facilities in Bulk

Delete the registered facilities in bulk. The facility reservation is canceled from the appointment that has the reservation for the deleted facility.
Only operational administrators of the facility group can delete the facilities in bulk.

Caution

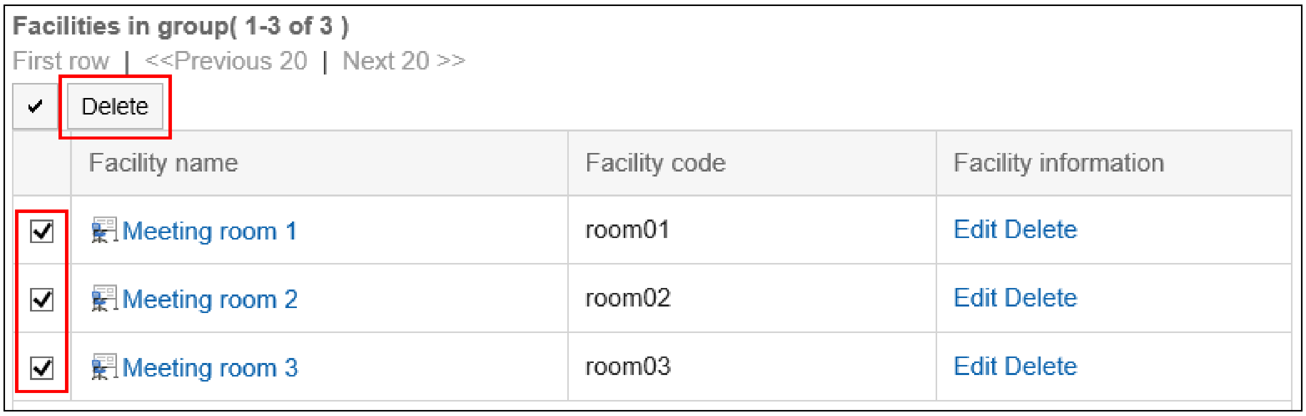
- Once you delete facilities, they cannot be restored.

Steps:

1. **On the "Scheduler" screen, click Facility settings under Options.**

2. **On the "Facility settings" screen, select a facility group.**

3. **Select the check boxes of the facilities you want to remove, and then click Delete.**



4. Click Yes on the "Delete facilities" screen.

2.4.7. Change Facility Reservation Settings

Change settings related to facility groups and facility reservations.

You can apply the settings from parent facility groups or set the period in which the users can reserve.

Caution

- The users with operational administrative privileges are not affected by the limitations you configure on the "Edit facility reservation settings" screen.
  Regardless of these settings, they can add and edit the reservations of facilities and facility groups for which they have permissions.
  - Maximum reservation period
  - Maximum duration per reservation
  - Users allowed to edit reservations
  - Repeating appointments

Steps:

1. Click the Administration menu icon (gear icon) in the header.

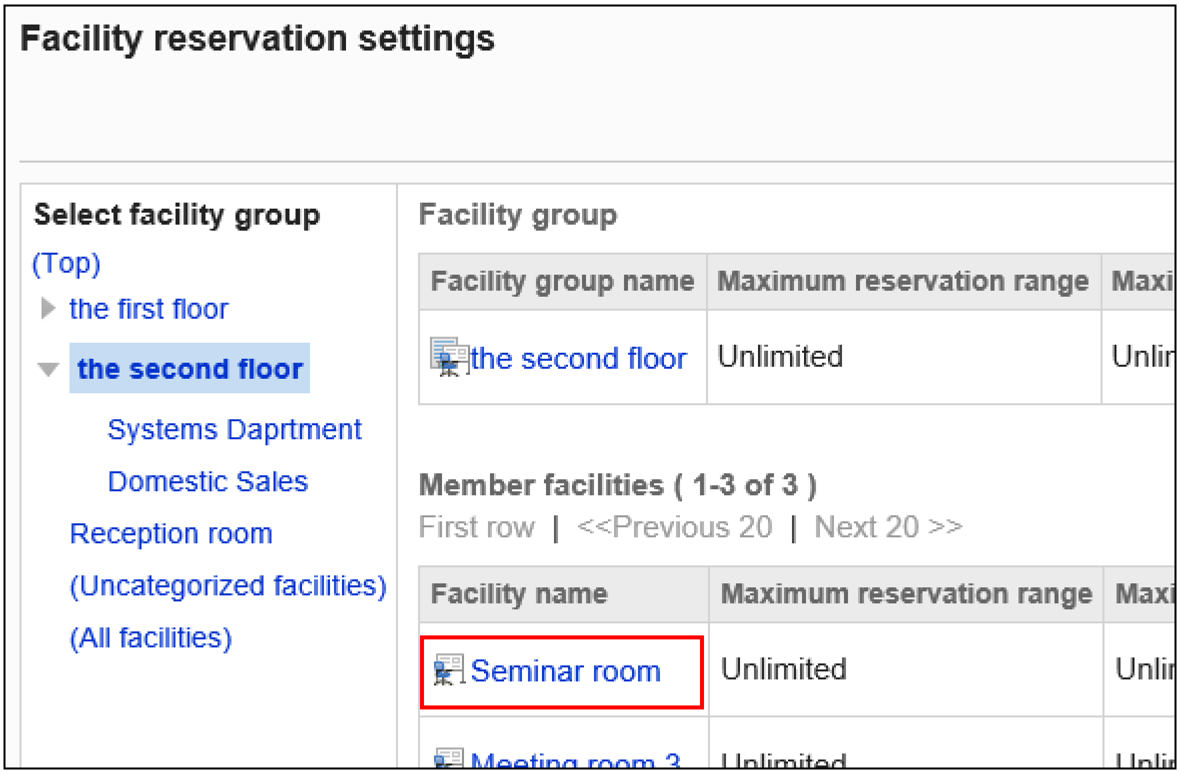
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Scheduler".

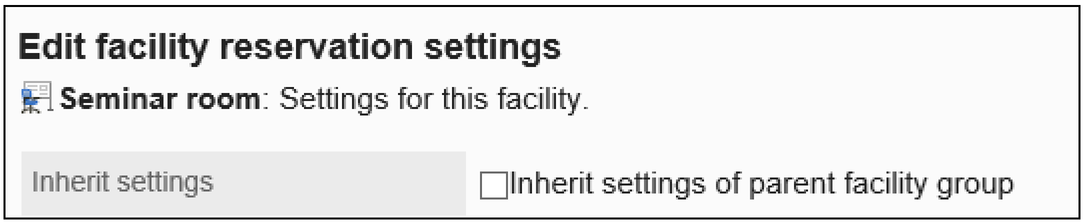
5. Click "Facility reservation settings".

6. On "Facility reservation settings" screen, select a facility group, and then click the facility group name or facility name to change its settings.

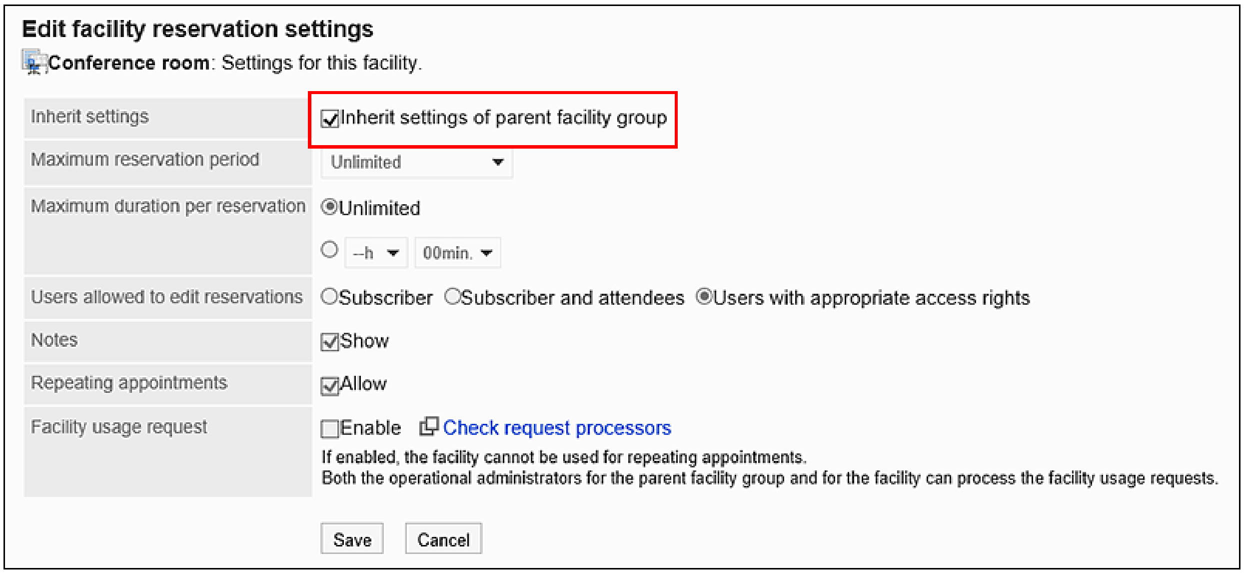


7. In the "Inherit settings" field on the screen for changing facility group settings, select whether to inherit the settings of the parent facility group.

- **If you select not to inherit parent facility group settings**:
  Clear the check box for propagating parent facility group contents and proceed to step 8.



- **If you select to inherit parent facility group settings**:
  Select the check box for propagating parent facility group contents and proceed to step 14.
  If you select the check box for propagating parent facility group contents, users cannot change other settings for facility reservation.



Note

- If you select the check box for propagating parent facility group contents, the facility reservation settings are inherited as follows:
  - **If a facility group has multiple levels**:
    The setting of a facility group in the upper level is inherited.
    If the facility group above it inherits the settings from its parent facility group, the facility group inherits the settings from 2 levels up.
  - **If the facility group has no upper levels**:
    Values specified on "Update all facility settings" screen is applied.
  - **If you have moved a facility or a facility group to others**:
    The settings of the parent facility group are inherited.
    If you change the settings of a parent facility group, the changes will also be applied to the inherited facility groups and facilities.
  - **Adding facilities**:
    The settings of the facility group to which the facility belongs are applied.

8. In the field to set "Maximum reservation period", you can set the period for facility reservation in months.

The following period can be set:

- Unlimited

- Set maximum period

  Enter the upper limit in single-byte numbers.

  You can set it in months.

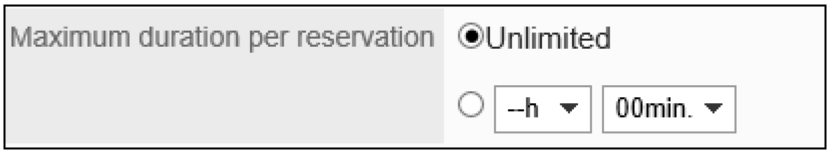
9. In the field to set "Maximum duration per reservation" for reservation settings, set the maximum amount of time that can be reserved per reservation.

The following period can be set:

- Unlimited:

  To allow more than 24 hours for a reservation, select "Unlimited".
- Specify the time:

  From the drop-down list, select from 30 minutes to 23 hours in 30 minutes.

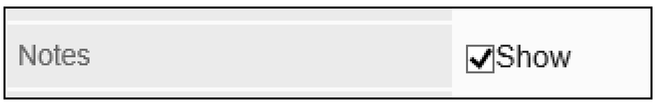


10. In the field to select users who can change reservations, select a user who can change facility reservations.

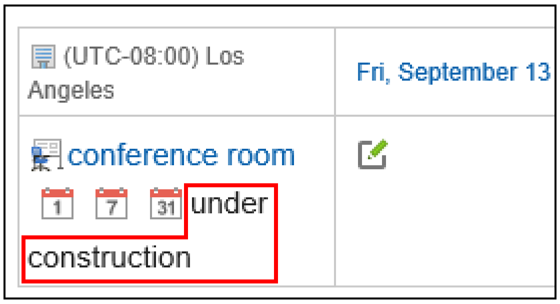
The following users can be selected:

- Subscriber
- Subscriber and attendees
- Users with appropriate access rights

11. In the field to "Show notes in appointment lists", select whether to show notes for the facility.



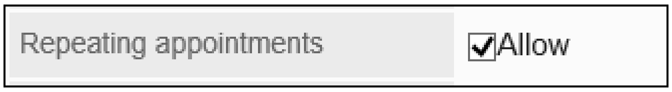
If you select "Show" check box, the notes set for the facility is shown on the facility list screen.



12. **In the field for "Repeating appointments", you can set whether to allow repeating facility appointments.**

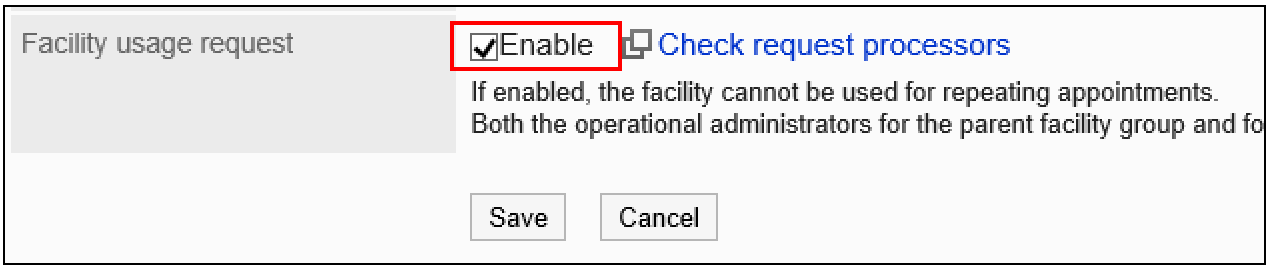
Selecting "Allow" check box allows users to add repeating appointments to the facility.

The facility set for repeating appointments will remain available to be reserved until the end of the period even if the "Allow" check box is cleared later.

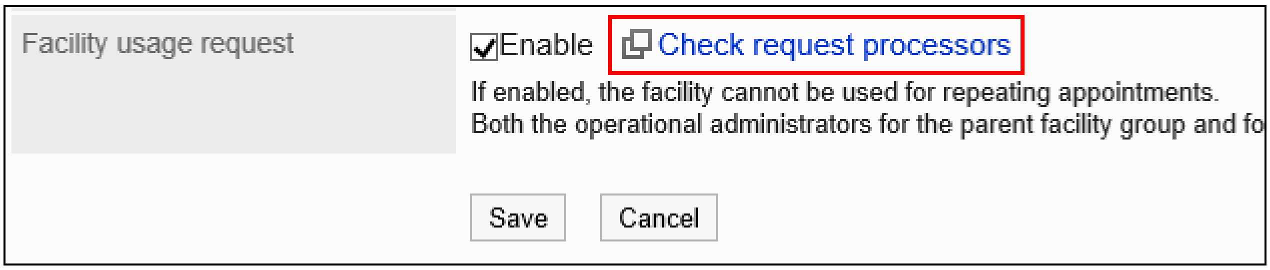


13. **In the "Facility usage requests" field, select whether the approval of the operational administrators of the facility is required when users use the facility.**

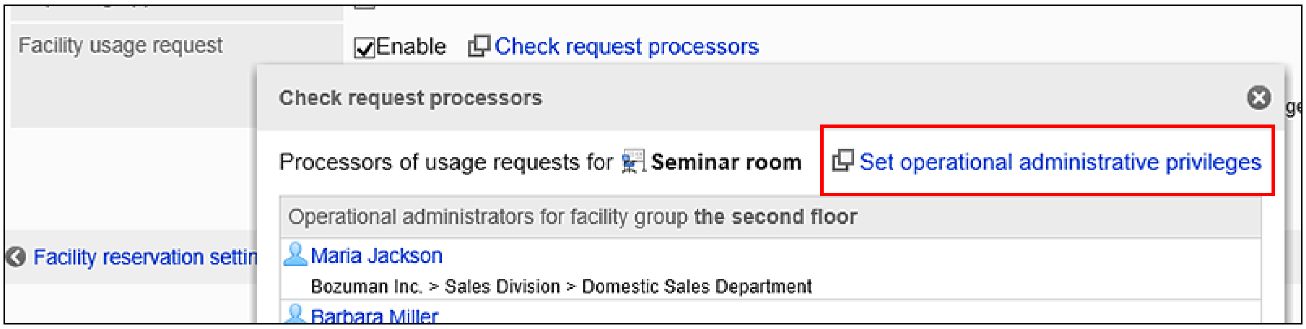
If you select "Enable" check box, users must be approved when they use the facility.



In "Facility usage request" field, you can check the operational administrative privileges of the selected facility groups or the facility group the facility belongs, and the parent facility group by clicking "Check request processors".



You can set operational administrative privileges for a facility group(875Page) by clicking **Check request processors** and clicking **Operational administrators** on "Check request processors" dialog box.



Note

- Only operational administrators for the facility groups can approve or reject the facility usage requests. Facility usage requests can only be used for regular appointments.
  For details, refer to Processing the Usage Requests.
- If a facility having repeating reservations is changed to require approval requests, an error occurs when the user try to change the reservation and cannot change it. Only the operational administrators of the facility can change the appointment.

14. Confirm your settings and click "Save".

Updating All Facility Reservation Settings

All facilities and facility groups can be set in bulk.

Steps:

1. Click the administration menu icon (gear icon) in the header.

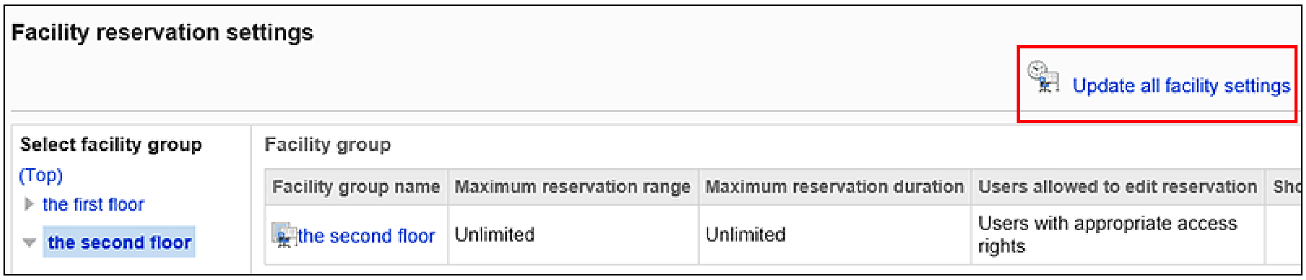
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Scheduler".

5. Click "Facility reservation settings".

6. On "Facility reservation settings" screen, click "Update all facility settings".



7. **On "Update all facility settings" screen, you can change the required items.**

8. **Confirm your settings and click "Save".**

The settings will be applied to all facility groups and facilities.

2.4.8. Setting up Items for Facility Reservation Information

There are two types of facility reservation information:

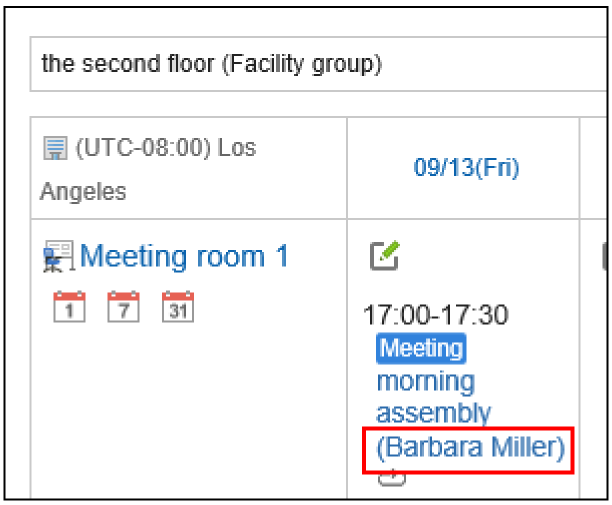
- Built-in fields

  These are provided by default.
- Custom items

  These can be added by administrators if necessary.

Changing Built-In Item Settings

Change whether or not the built-in items are displayed in the facility list.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

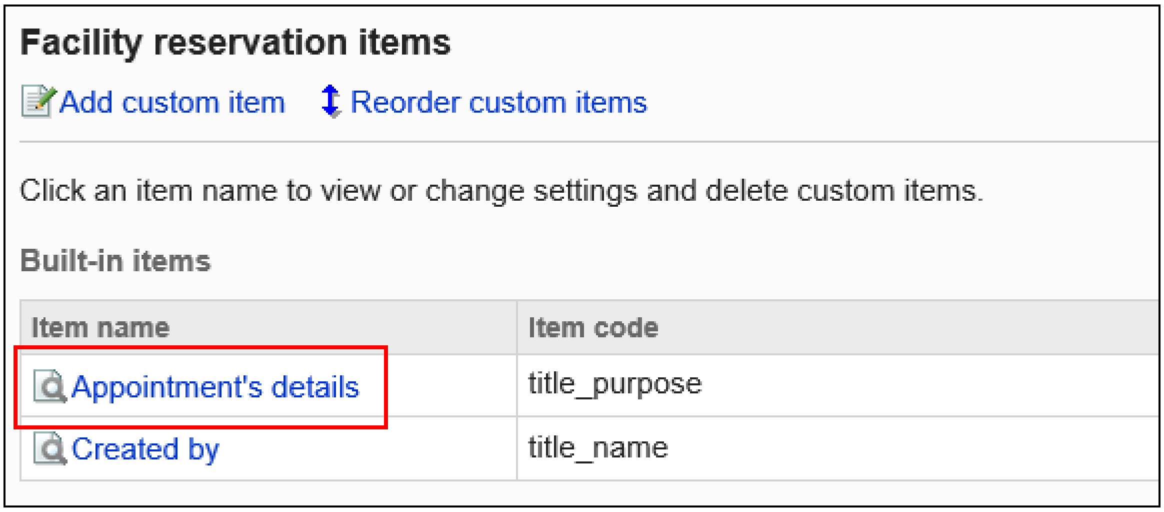
2. **Click "System settings".**

3. **Select "Application settings" tab.**

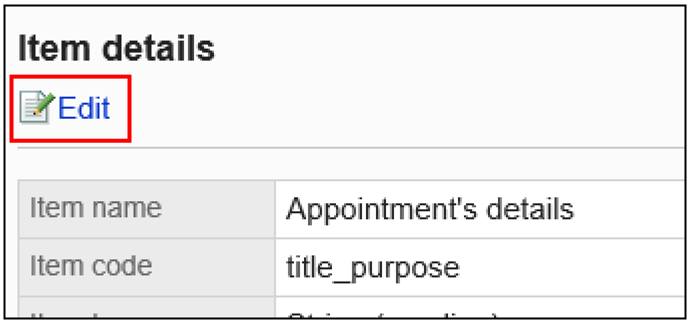
4. **Click "Scheduler".**

5. **Click the item for facility reservation information.**

6. **On the screen for facility reservation information, click the item name of the built-in item to change.**



7. **On the item details screen, click "Save".**



8. **To show facilities on list view, select the check box for list view as a default view on the screen to change items.**

9. **Check the changes and click "Save".**

Changing Multiple Built-In Item Settings in Bulk

You can also set whether to show the built-in items in the facility list.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

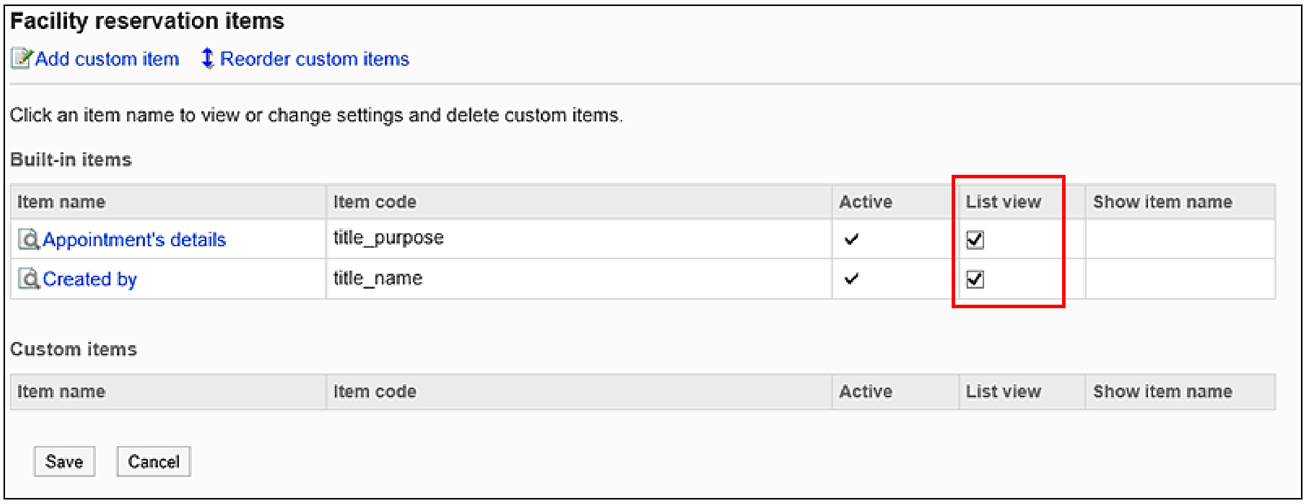
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facility reservation information.**

6. **On the screen for facility reservation information, select the check box for list view of built-in items to show in the facility list.**



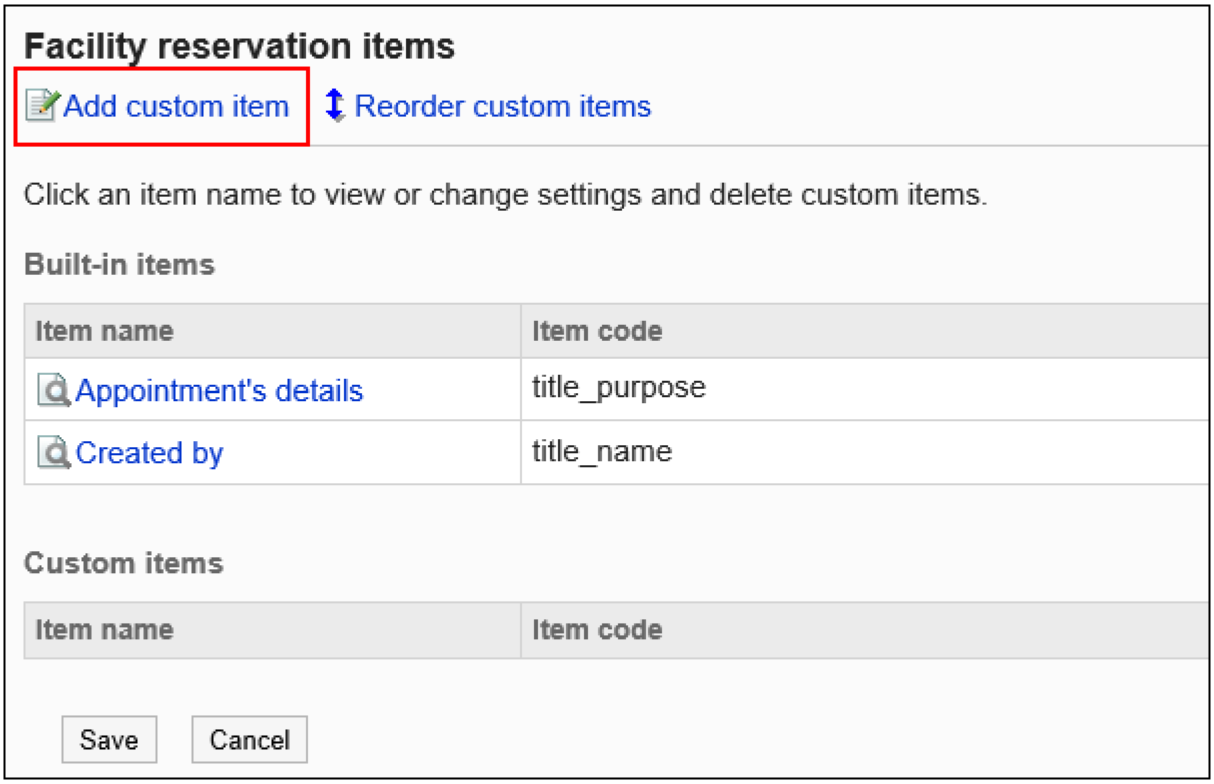
7. **Confirm your settings and click "Save".**

Adding Custom Items

Add custom items to facility reservations.

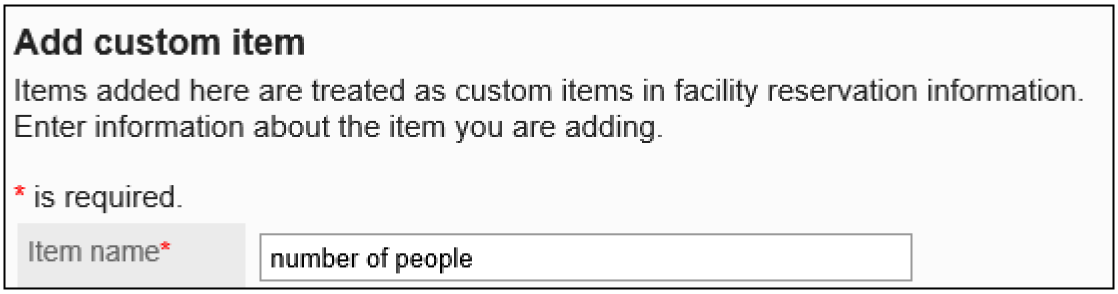
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item for facility reservation information.**
6. **On the screen for facility reservation information, click to add custom items.**



7. **On the screen to add custom items, enter the "Item name" field.**

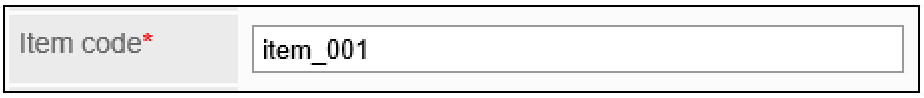
You should set the item names.



8. **Enter "Item Code" field.**

You should set item codes.

This is a unique code for identifying an item.

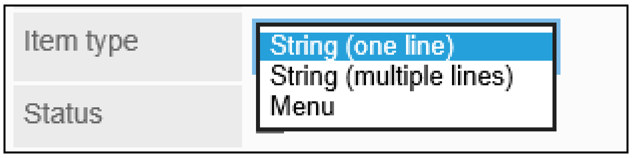


9. **In "Item Type" field, select a type from the drop-down list.**

The following types can be selected:

- String (one line)
- String (multiple lines)
- Menu

  Enter one menu in one line. You can set one of the menus as the default value.



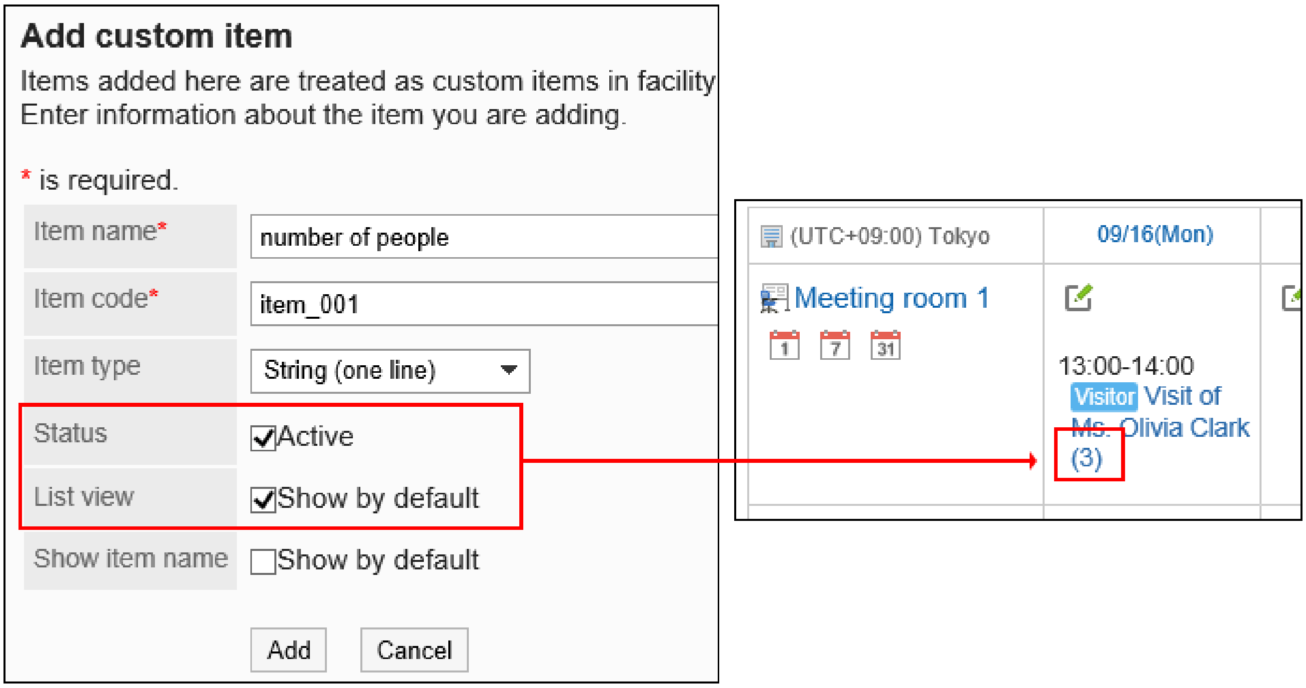
10. **To enable the added custom item immediately, select "Enable" check box in the "Status" field.**

11. **If you display the contents of custom items when you select a facility or a user to view appointments in the list, set it as follows:**

- Use field:

  Select "Enable" check box.
- Show as list field:

  Select the check box to view as a default view.



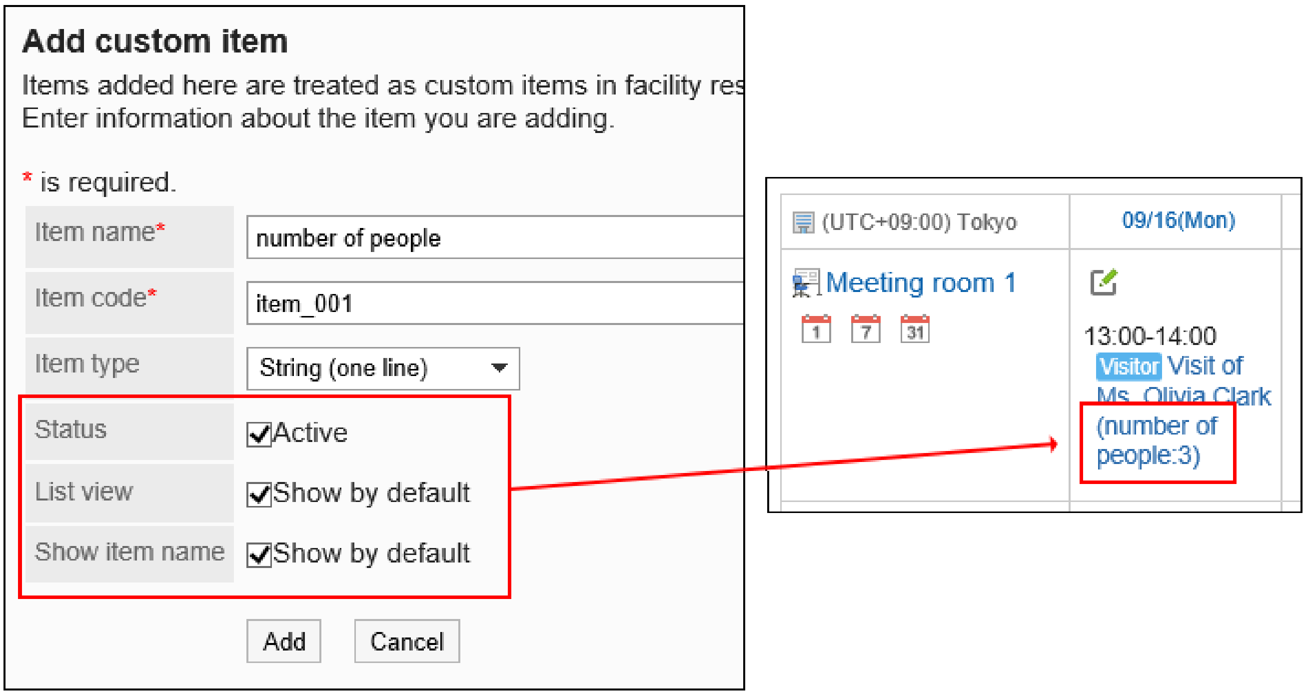
12. **If you display the item names of custom items when you select a facility or a user to view appointments in the list, set it as follows:**

- Use field:

  Select "Enable" check box.
- Show as list field:

  Select the check box to view as a default view.
- Item names in list field:

  Select the check box to view as a default view.



13. **Confirm your settings and click "Add".**

Changing Custom Items

Change custom item settings.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

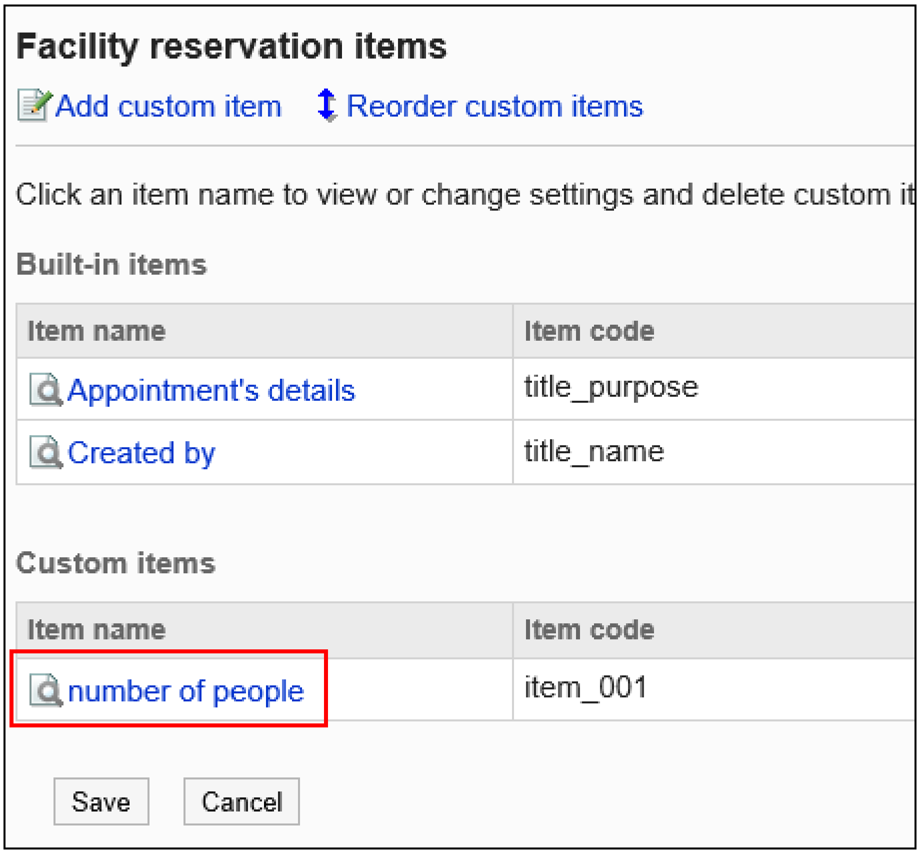
2. **Click "System settings".**

3. **Select "Application settings" tab.**

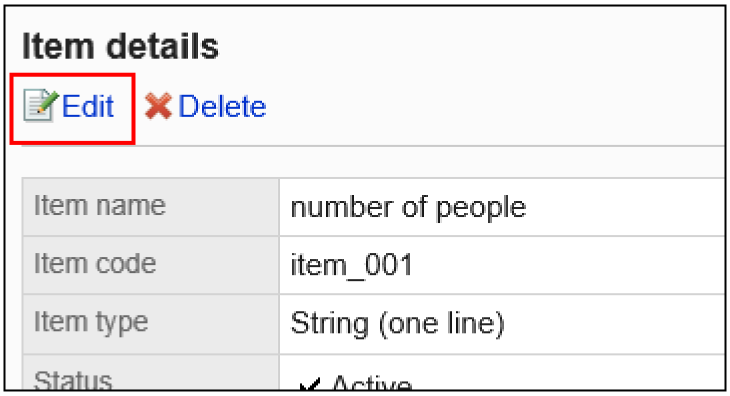
4. **Click "Scheduler".**

5. **Click the item for facility reservation information.**

6. **On the screen for facility reservation information, click the item name of the custom item to change.**



7. **On the item details screen, click "Save".**



8. **On the screen to change items, change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Changing Multiple Custom Item Settings in Bulk

You can change the settings for custom items in bulk.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

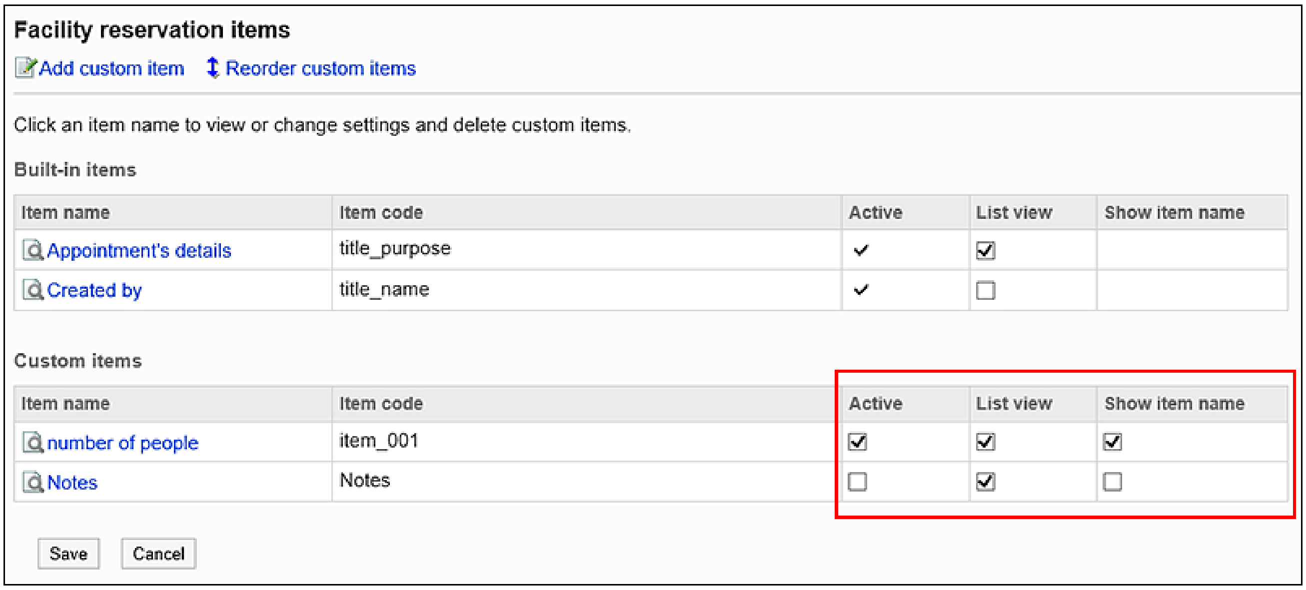
4. **Click "Scheduler".**

5. **Click the item for facility reservation information.**

6. **On the screen for facility reservation information, change the settings of items that can be changed in bulk if necessary.**

The setting fields that can be changed in bulk are as follows:

- "Enable" field
- "List view" field
- Item names in list field



7. **Confirm your settings and click "Save".**

Reordering Custom Items

Reorder custom items.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

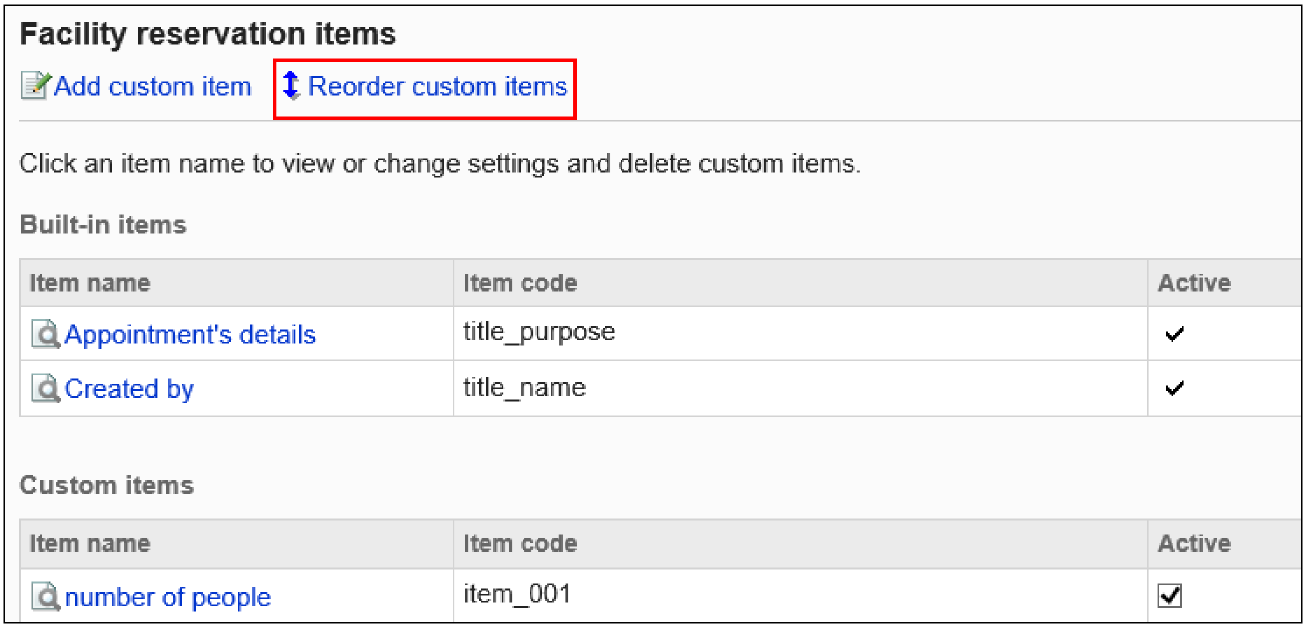
2. **Click "System settings".**

3. **Select "Application settings" tab.**

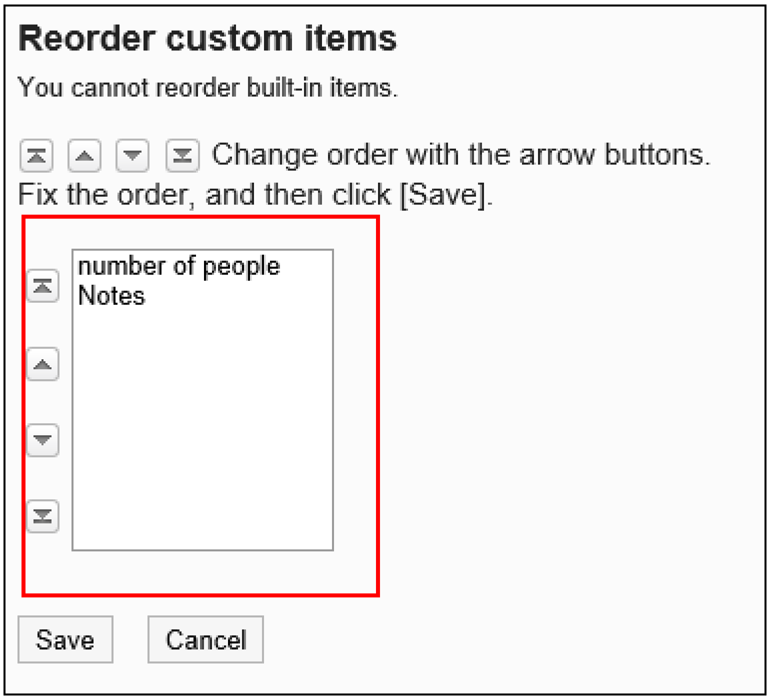
4. **Click "Scheduler".**

5. **Click the item for facility reservation information.**

6. **On the screen for facility reservation information, click to reorder custom items.**



7. **On the screen to reorder custom items, reorder the custom items.**



8. **Confirm your settings and click "Save".**

Deleting Custom Items

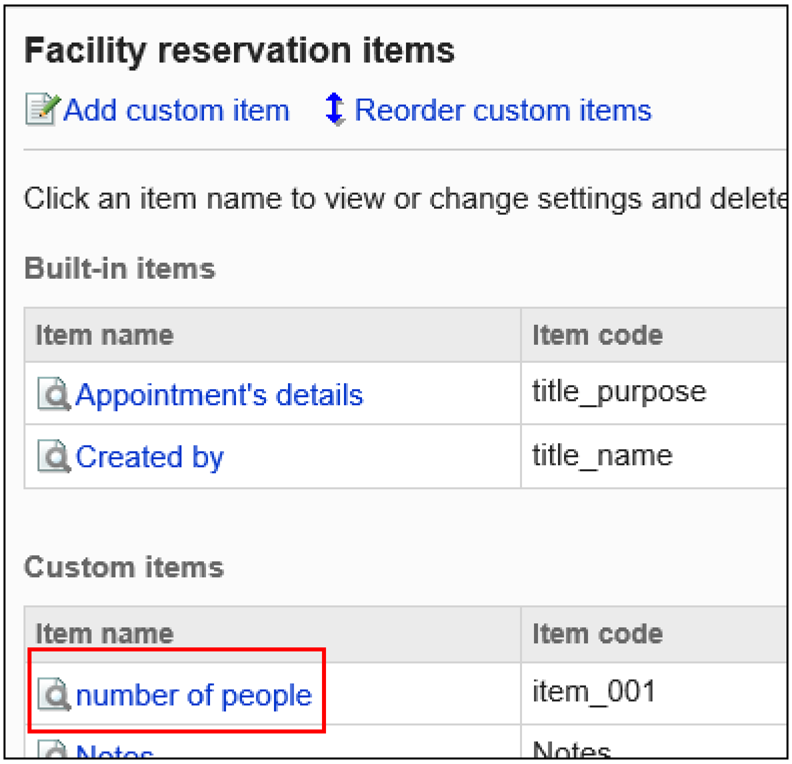
Delete custom items.

Caution

- After deleting custom items, cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click the item for facility reservation information.**
6. **On the screen for facility reservation information, click the item name of the custom item to delete.**



7. **On the item details screen, click "Delete".**

8. Click "Yes" on the screen to delete items.

2.4.9. Setting Access Permissions for Scheduler

You can set the following access permissions for departments, users, roles, facility groups, or facilities.

- Access permissions
- Add permissions
- Change permissions
- Delete permissions

Caution

- **Appointments that have you as only attendee:**
  You can also change or delete the appointments even if you only have access permission.
- **Appointments that you are not an attendee:**
  If the appointment includes attendees who cannot access it, an error (GRN_SCHD_13002) occurs when "Appointment Details" page is displayed.

The permissions for scheduler vary by the security model applied to the scheduler.
The default setting is set to "REVOKE (All users have access except users on list)". Therefore, all users are allowed to view, add, change, or delete schedulers.
For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

User Rights for Organizations

The permissions that you set for schedulers for departments apply to the department schedulers and to the schedulers of users who belong to the departments.

User Rights for Facility Groups

The permissions that you set for facility groups apply to the facilities that belong to the groups.
For example, if a facility group named "Conference rooms" has two facilities such as Seminar room and Conference room 1, the access permissions set for "Conference rooms" will also be applied to the Seminar room and Conference room 1.

Setting User Rights

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

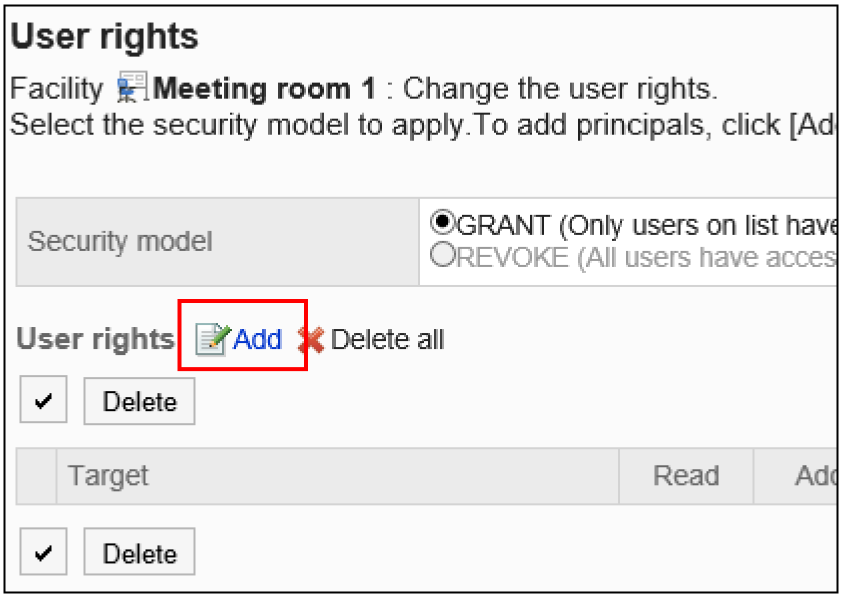
Caution

- If you change your security model, configured permissions before changing are initialized.

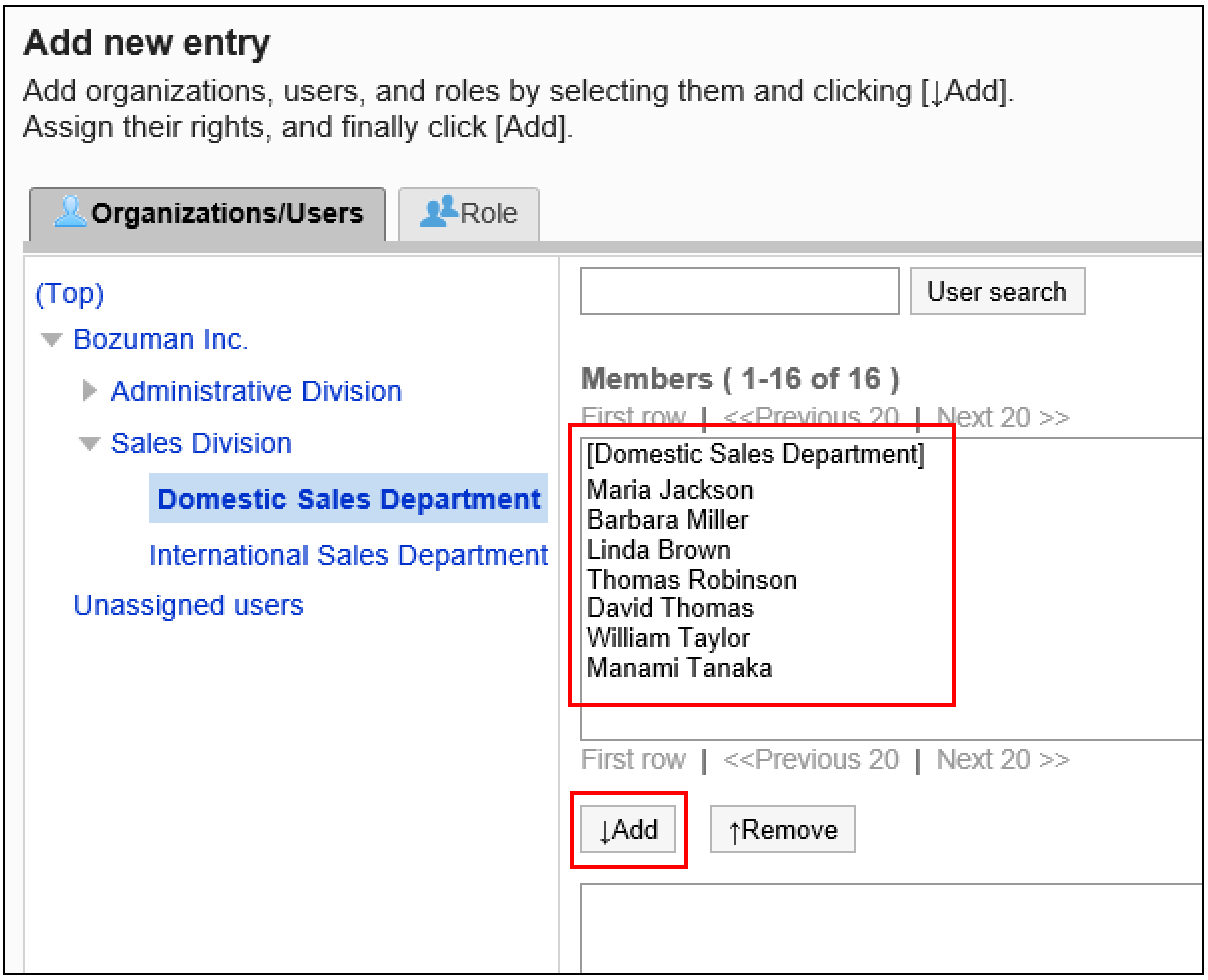
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select departments, users, roles, facility groups, or facilities to set.**
7. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**
   If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).

8. **Click "Add".**



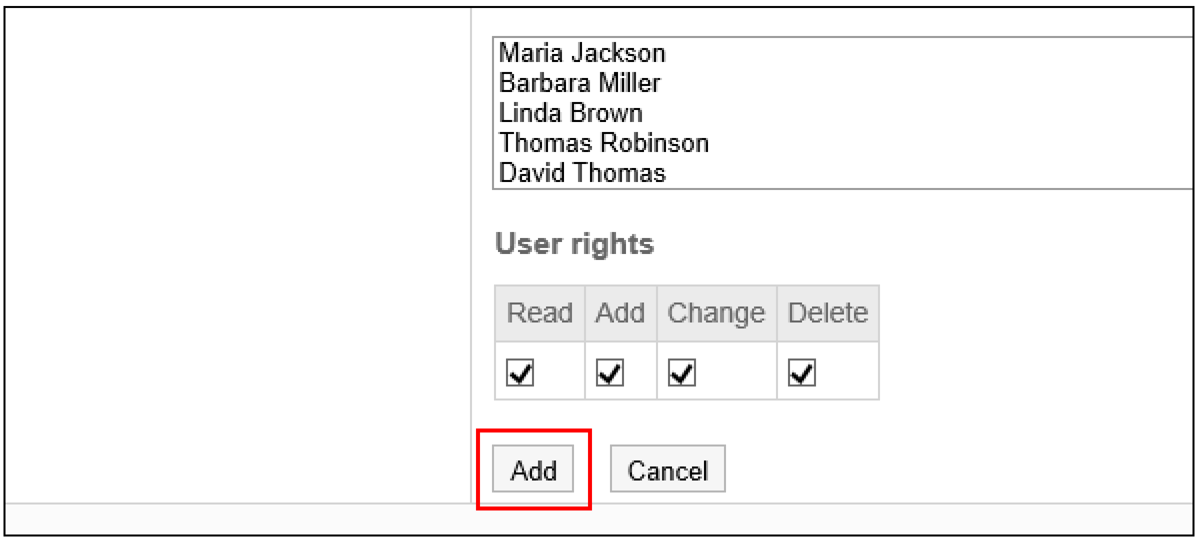
9. **On "Add new entry" screen, select the department, user, or role to set permissions, and click "Add".**



To select a role, switch the view to the Roles tab.

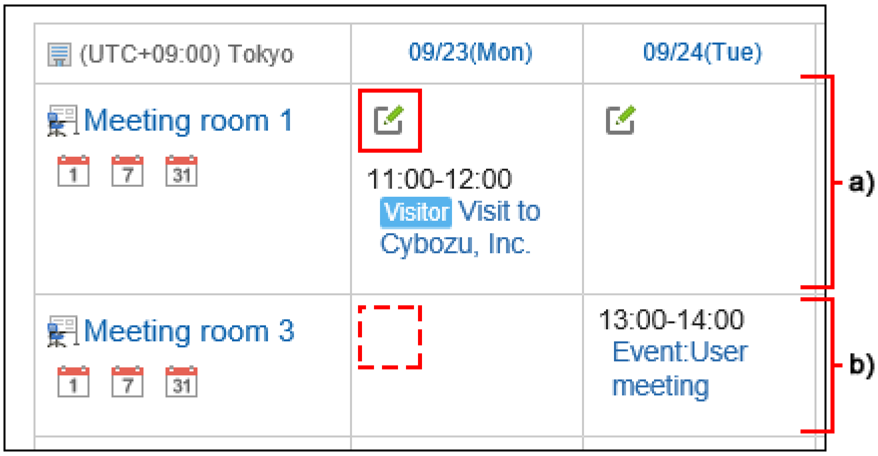
After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

10. Under "User rights", select the check boxes of the permissions to allow, and then click "Add".



Combination of User Rights

When actions on Scheduler are controlled by user rights, the Scheduler screens display only links, buttons, or users on which the login user is allowed to make actions.



a): Facilities that you have access permissions for appointments and can reserve
b): Facilities that you have access permissions for appointments but cannot reserve

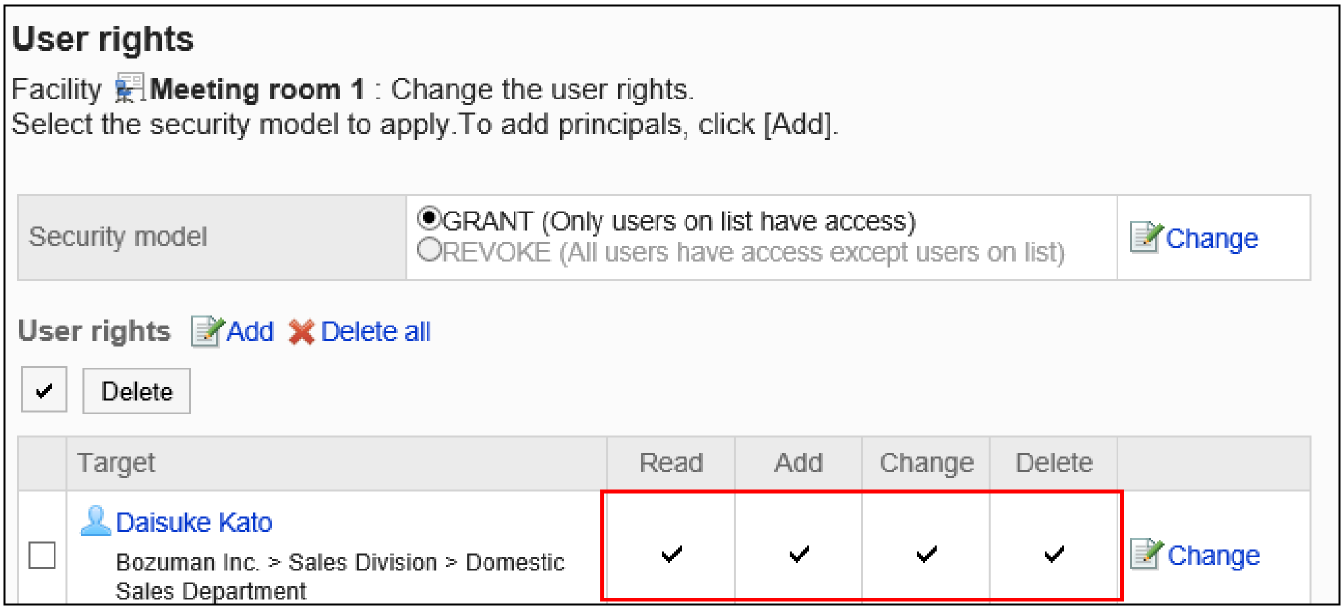
Permissions When User Rights Are Duplicated

refer to When Facility Groups and Facilities Have Different Access Permissions(54Page) for information on which access permission override when you have access permissions to a facility and a facility group that the facility belongs.
When both a user and an organization/role to which the user belongs have access permissions to the user's Scheduler, the access permission of the user has the priority. For details, refer to When Organizations, Users, and Roles Have Different Permissions(53Page).

If the security model is "GRANT (Only users on the list have access)"

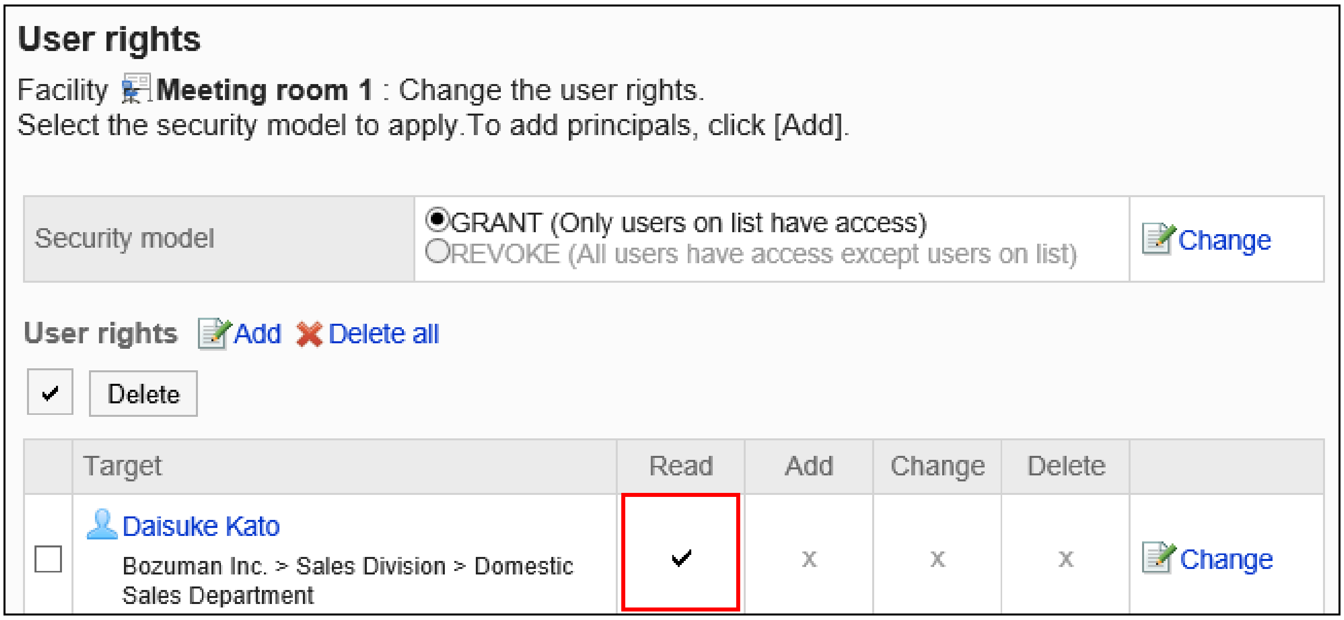
The example shows that the case in which the access permission security model for the conference room 1 is "GRANT (Only users on list have access)".

- **Example of allowing Daisuke Kato to perform all the actions on Conference room 1**:
  Grant Daisuke Kato permissions to view, add, change, and delete appointments.



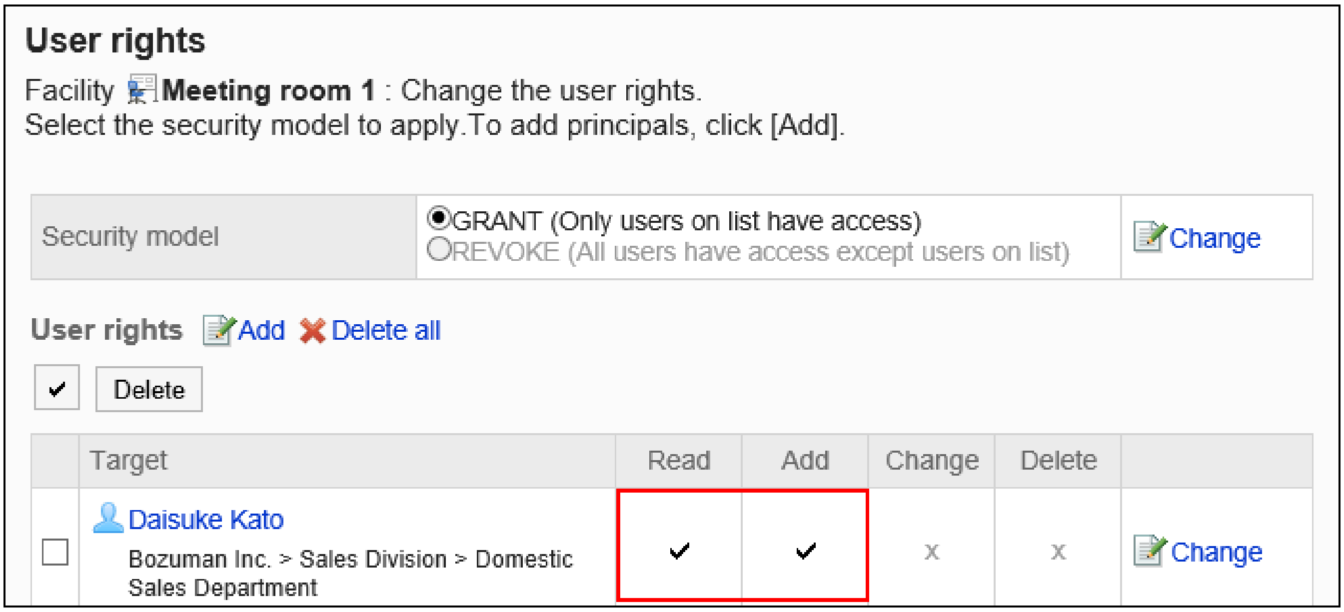
- **Example of allowing Daisuke Kato to perform only view scheduler action**:

  Grant Daisuke Kato a permission to view items.

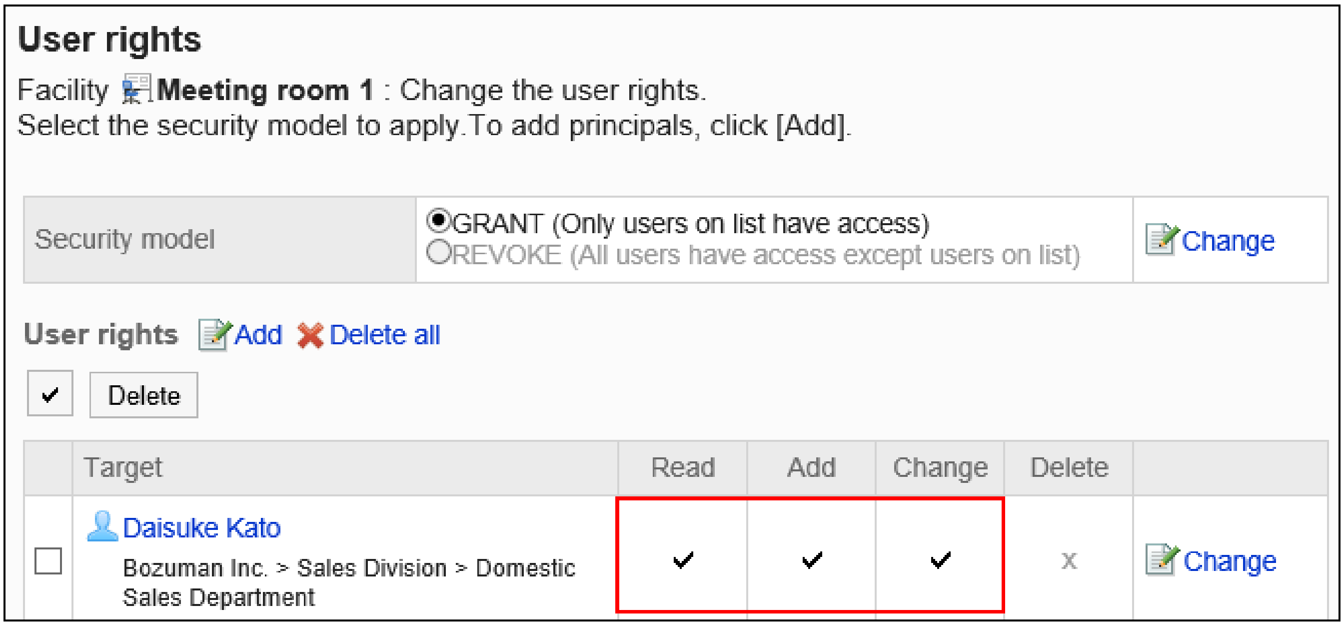


- **Example of allowing Daisuke Kato to perform add appointment actions on Conference room 1**:

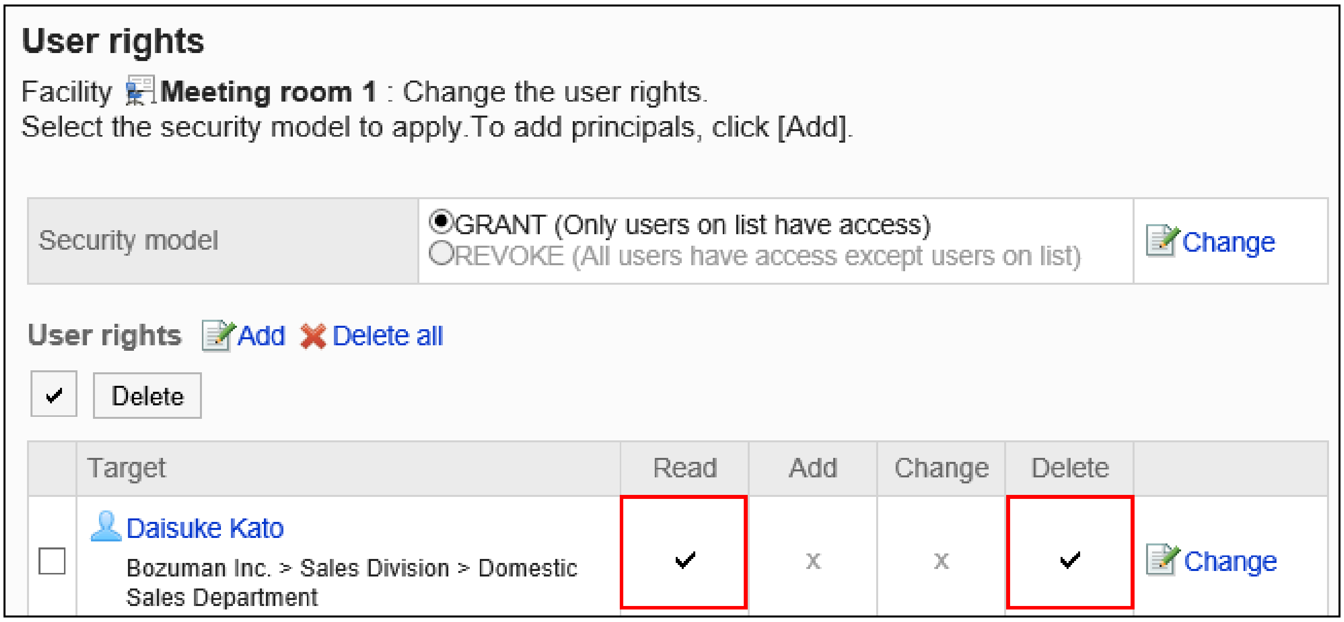
  Grant Daisuke Kato permissions to view and write appointments.



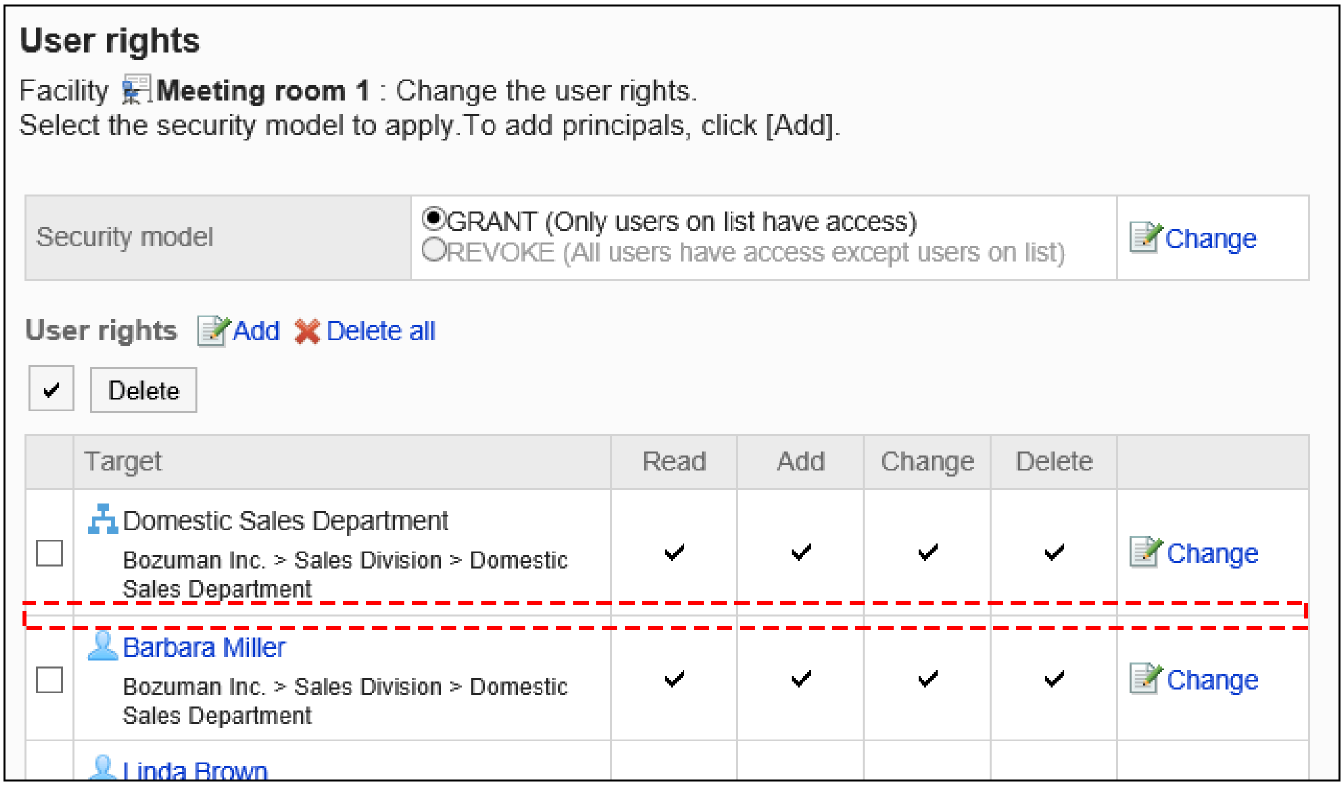
- **Example of allowing Daisuke Kato to perform change appointment actions on Conference room 1**:
  Grant Daisuke Kato permissions to view, add, and change appointments.



- **Example of allowing Daisuke Kato to perform delete appointment actions on Conference room 1**:
  Grant Daisuke Kato permissions to view and delete appointments.



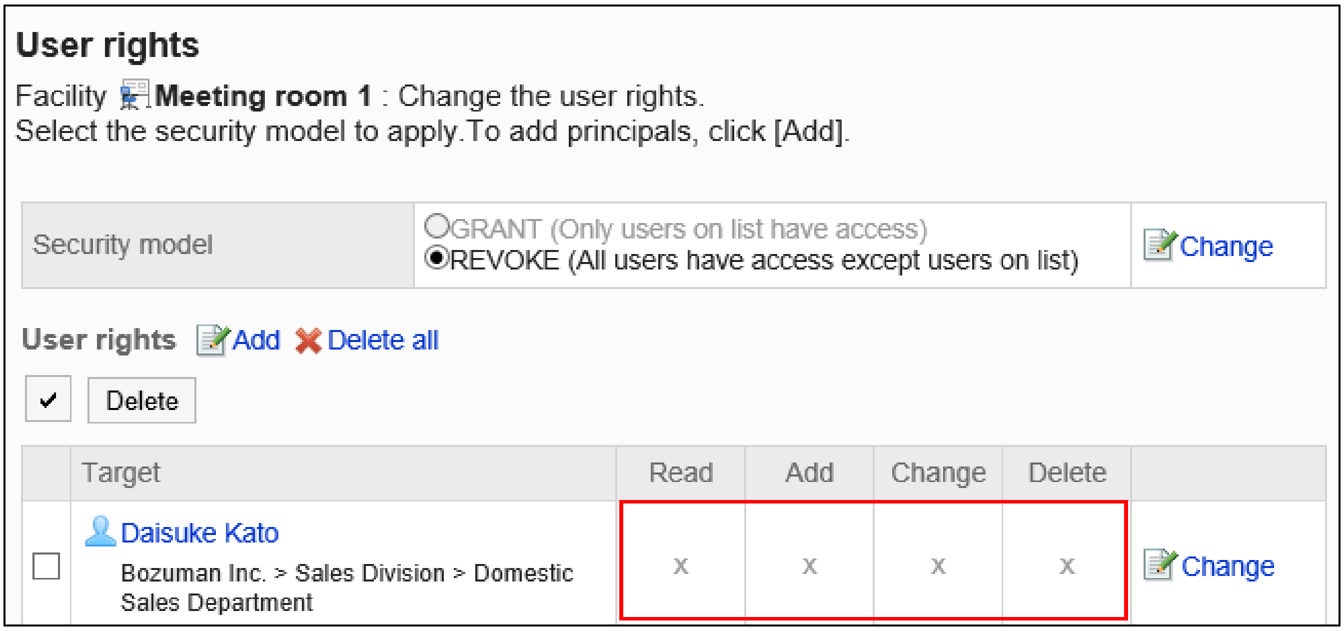
- **Example of prohibiting Daisuke Kato to perform all the actions on Conference room 1**:
  Delete Daisuke Kato from the user rights list.



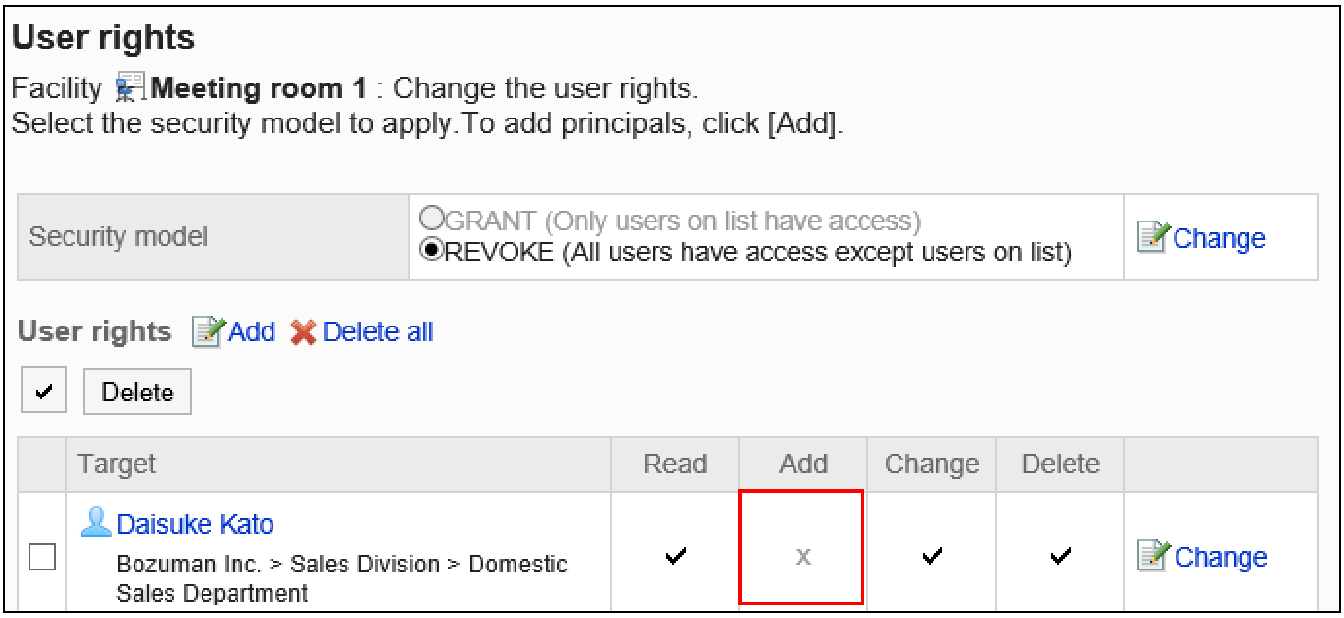
If the security model is "REVOKE (All users have access except users on the list)"

The example shows that the case in which the access permission security model for the conference room 1 is "REVOKE (All users have access except users on list)".

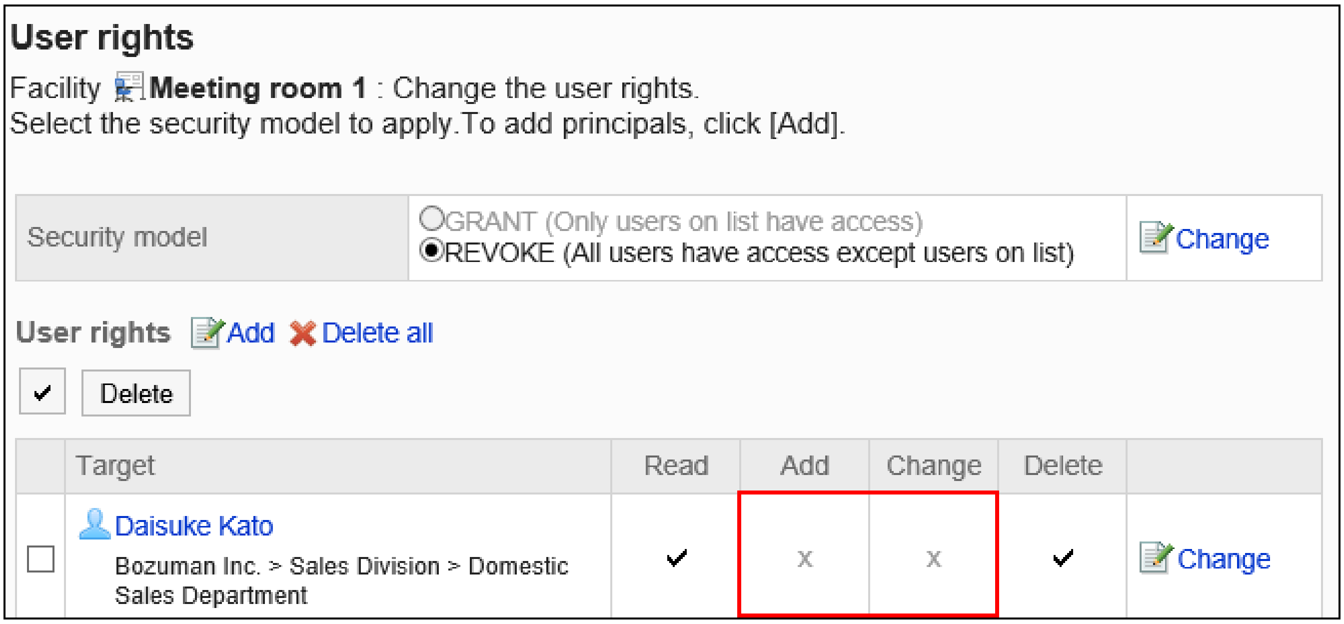
- **Example of prohibiting Daisuke Kato to perform all the actions on Conference room 1**:
  Delete permissions to view, add, change, and delete appointments from Daisuke Kato.



- **Example of prohibiting Daisuke Kato to perform add appointment actions on Conference room 1**:
  Delete a permission to add appointments from Daisuke Kato.

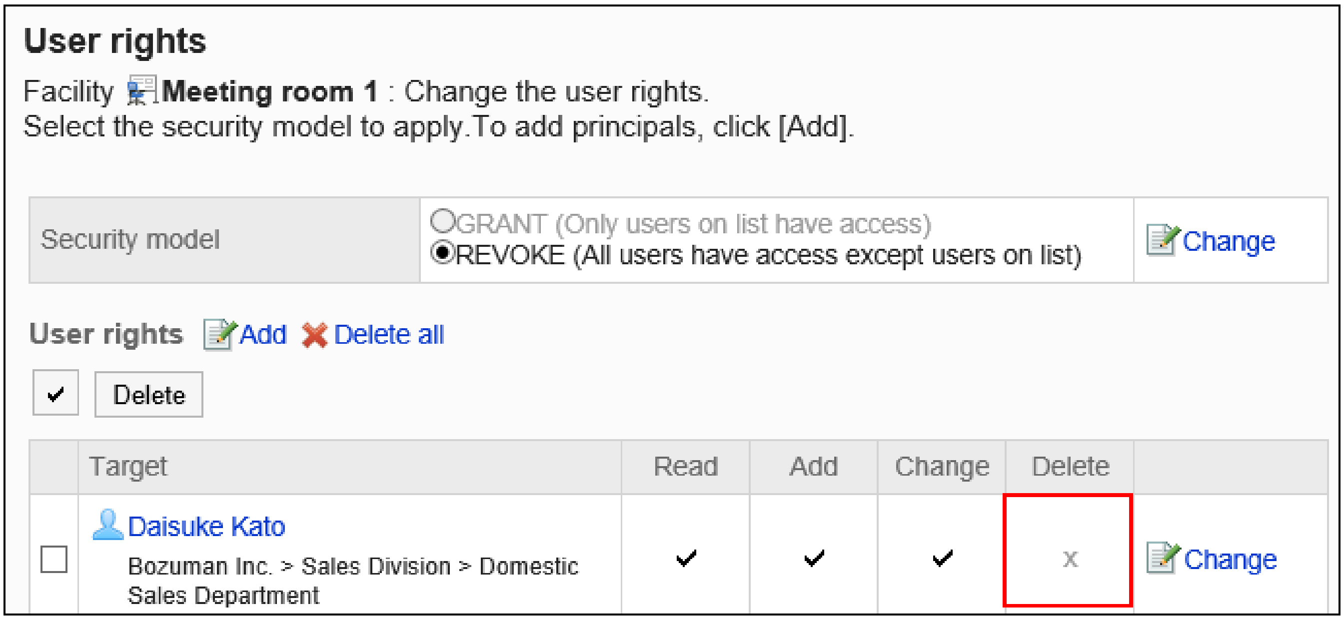


- **Example of prohibiting Daisuke Kato to perform change appointment actions on Conference room 1**:
  Delete permissions to add and change appointments from Daisuke Kato.



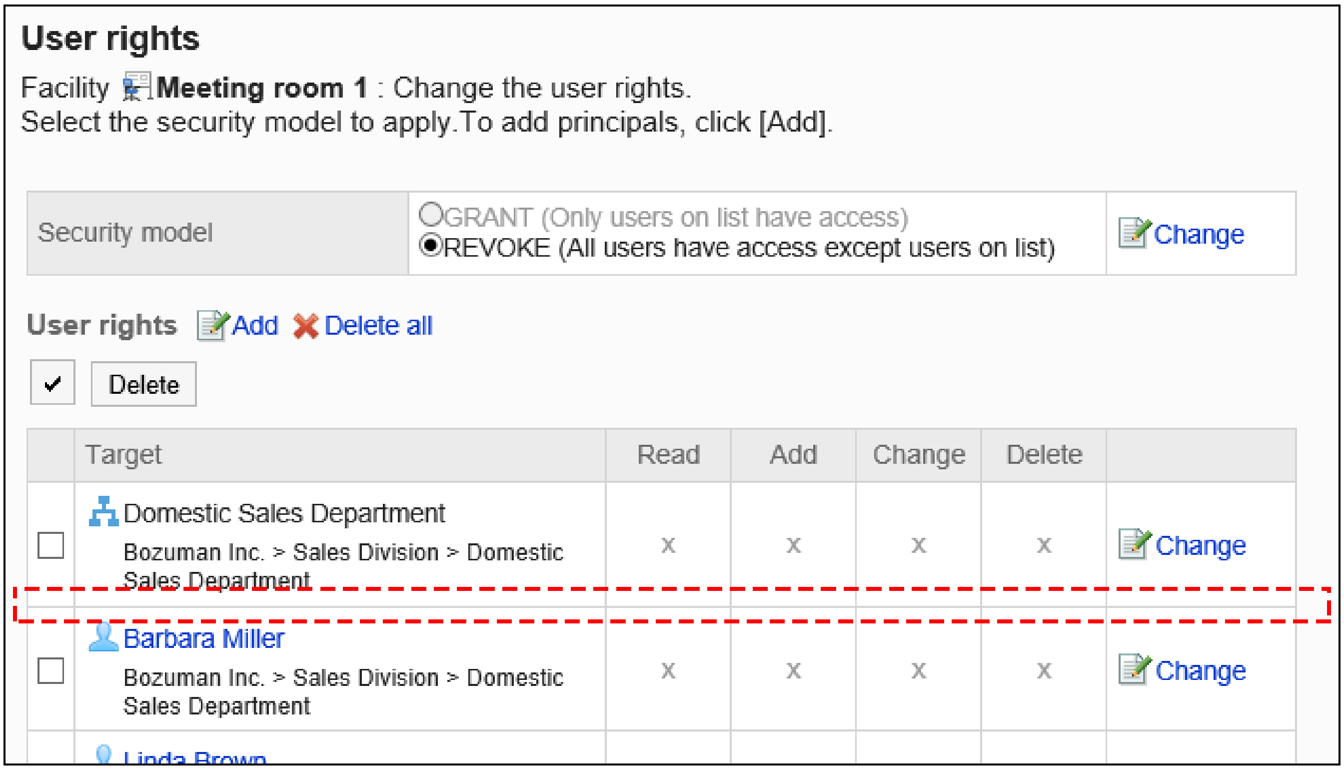
- **Example of prohibiting Daisuke Kato to perform delete appointment actions on Conference room 1**:

  Delete a permission to delete appointments from Daisuke Kato.



- **Example of allowing Daisuke Kato to perform all the actions on Conference room 1**:

  Delete Daisuke Kato from the user rights list.

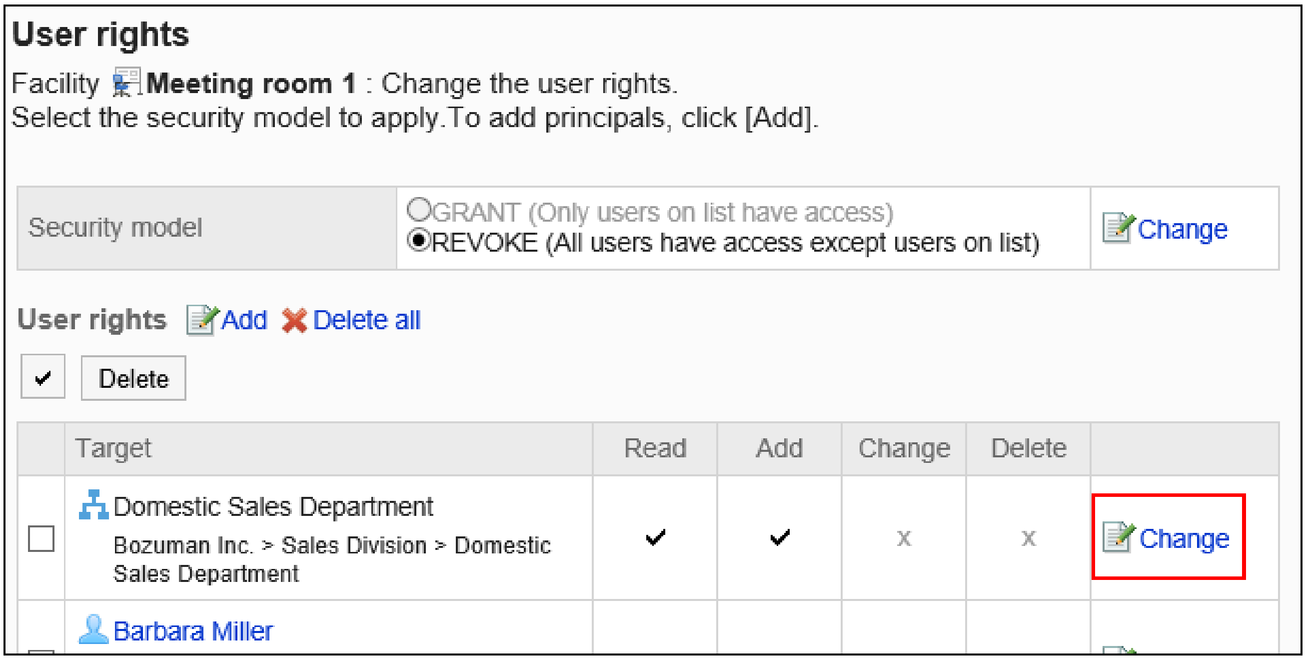


Changing User Rights

Change access permissions granted to users and departments.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select departments, users, roles, facility groups, or facilities to set.**
7. **On "User Rights" screen, click "Edit" for the user rights to change.**



8. **On "Edit user rights" screen, you can change the user rights as needed.**

9. **Confirm your settings and click "Save".**

Deleting User Rights

Delete access permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

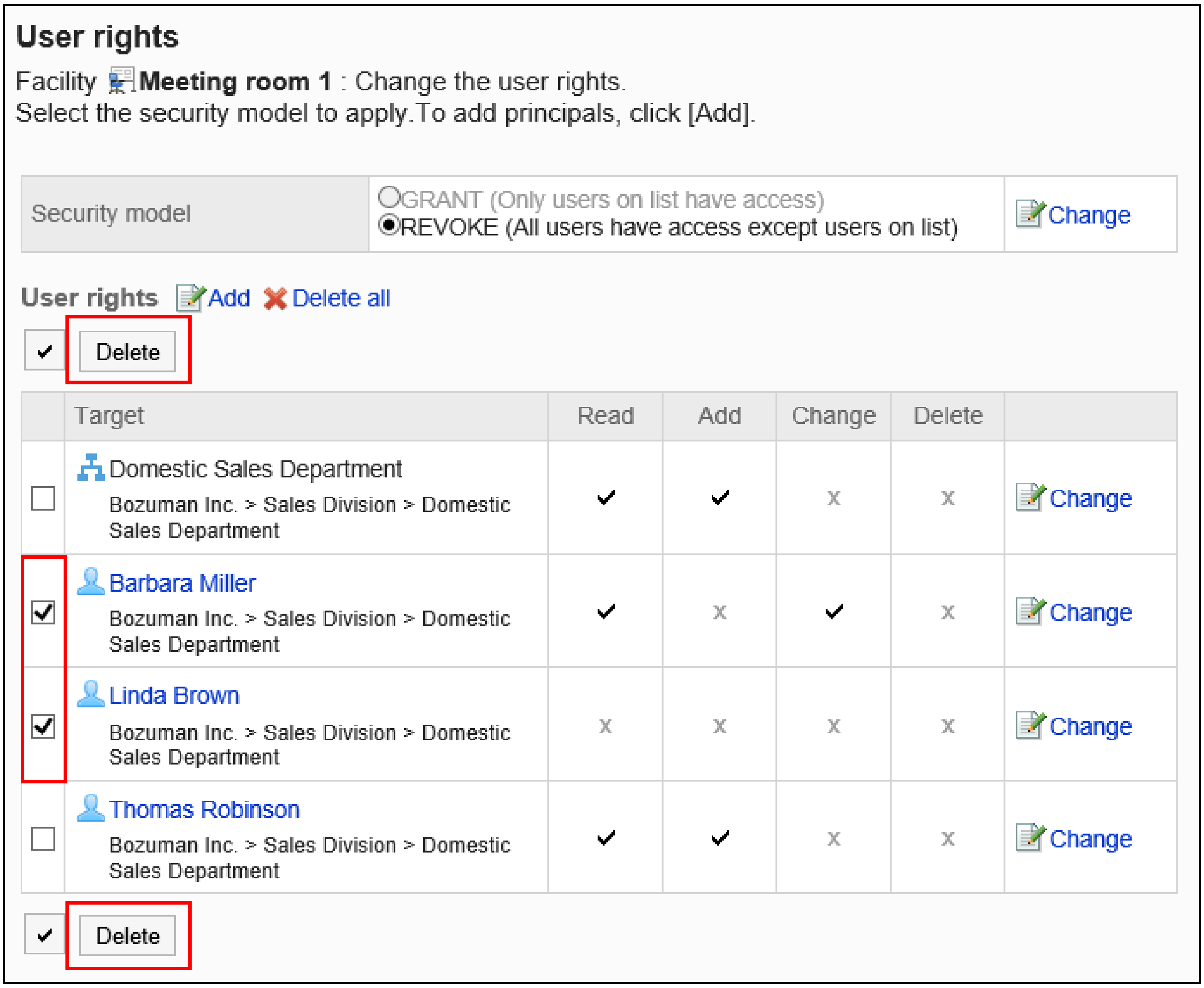
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select departments, users, roles, facility groups, or facilities to set.**

7. **On "User Rights" screen, select the check box for the user rights to delete, and then click "Delete".**



8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

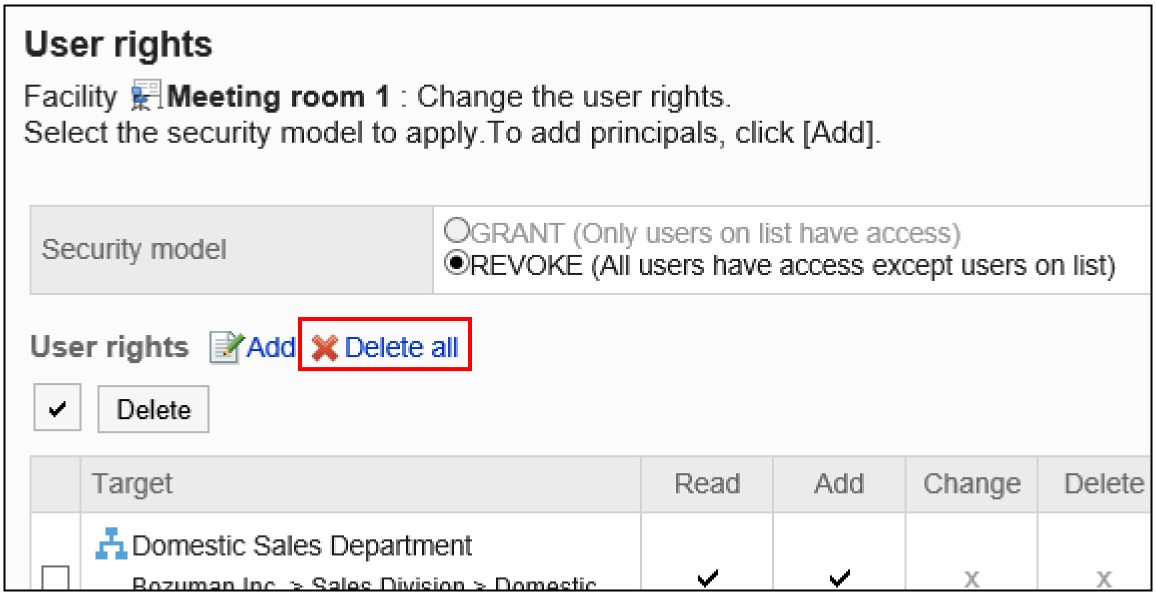
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click the item for facility reservation information.**

6. **On the screen to set user rights, select departments, users, roles, facility groups, or facilities to set.**

7. **On "User rights" screen, click "Delete all".**



8. **Click "Yes" on "Delete all user rights" screen.**

2.4.10. Setting up V-CUBE Meetings

This section describes the settings performed by system administrators to allow users to use V-CUBE Meetings on scheduler.

What is V-CUBE Meeting?

V-CUBE Meeting is a service to hold conferences and meetings using WEB conference rooms (virtual conference rooms on the Internet).
By accessing the specified address, users who are away from the office or those who do not have access to Garoon can also join the conferences.
Setting up WEB cameras and headsets on client computers makes the attendees join the WEB TV conferences via both video and audio face to face.

Note

- V-CUBE Meeting is a service provided by V-cube, Inc. To sign up for V-CUBE Meeting, contact V-cube, Inc. via V-CUBE Meeting.
- For details on V-CUBE Meeting, refer to the manual provided by V-cube, Inc.

For V-CUBE Meeting 4/5

The instructions to use for V-CUBE Meeting for customers using the following versions of V-CUBE Meeting are as follows:
For questions, contact V-cube, Inc..

- V-CUBE Meeting 4
- V-CUBE Meeting 4 in V-CUBE One
- V-CUBE Meeting 5 in V-CUBE One

Note

- To sign up for V-CUBE Meeting, contact V-cube, Inc..
  V-cube, Inc. V-CUBE Meeting

For V-CUBE Meeting 4

Gets the following information:

Information	Tip
V-CUBE Meeting URL	https://meeting.nice2meet.us
Login ID	This is used as a login ID.
password	This is used as a login password.
Facility code (conference room ID)	This is used for settings in Garoon. Code to be used as the facility code.

For V-CUBE Meeting 4 in V-CUBE One

Gets the following information:

Information	Tip
V-CUBE Meeting URL	https://meeting.nice2meet.us
User ID issued by V-CUBE One	This is used as a login ID.
User password issued by V-CUBE One	This is used as a login password.
Facility code (conference room ID)	This is used for settings in Garoon. Code to be used as the facility code.

For V-CUBE Meeting 5 in V-CUBE One

Gets the following information:

Information	Tip
V-CUBE Meeting URL	https://mtg5l.vcube.com
User V-CUBE ID issued by V-CUBE One	This is used as a login ID.
User password issued by V-CUBE One	This is used as a login password.

Information	Tip
Facility code (conference room ID)	This is used for settings in Garoon. Code to be used as the facility code.

Flow to Setting up V-CUBE Meetings

To be able to reserve a WEB conference room for V-CUBE Meetings on Garoon Scheduler, you can perform tasks in the following order:

Steps:

Step 1 Obtain information required for Garoon from V-CUBE Meeting.

Step 2 Enter e-mail addresses of the users who use the Web conference room in the user information.

Step 3 Set up V-CUBE Meeting Support.

Step 4 Add a Web conference room as a facility in Garoon.

Step 5 Contact the users.

Step 1 **Obtain the information required to set the Garoon from the V-CUBE meeting.**

For details, refer to the following page:
For V-CUBE Meeting 4/5(921Page)

Step 2 **Add the e-mail address of the user using the Web conference room to the user information.**

For details, refer to Setting E-Mail Addresses in User Information(924Page).

Step 3 **Set V-CUBE Meeting connector.**

For details, refer to Setting up V-CUBE Meeting Support(924Page).

Step 4	**Add Web Conference Room as a facility for Garoon.**

For details, refer to Adding Web Conference Rooms(927Page).

Step 5	**Contact users to start using.**

Setting E-Mail Addresses in User Information

The attendees of the Web conference will receive information they need to log in to the Web conference room in e-mails.
Therefore, the system administrator must enter the e-mail addresses of all users who use the Web conference room in the user information before opening the V-CUBE Meeting in Garoon.
For instructions, refer to the Edit user profile(76Page).

Setting up V-CUBE Meeting

Set up the V-CUBE Meeting.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click V-CUBE Meeting Support.**

6. **On the screen to set up V-CUBE Meeting Support, select the check box to enable it.**

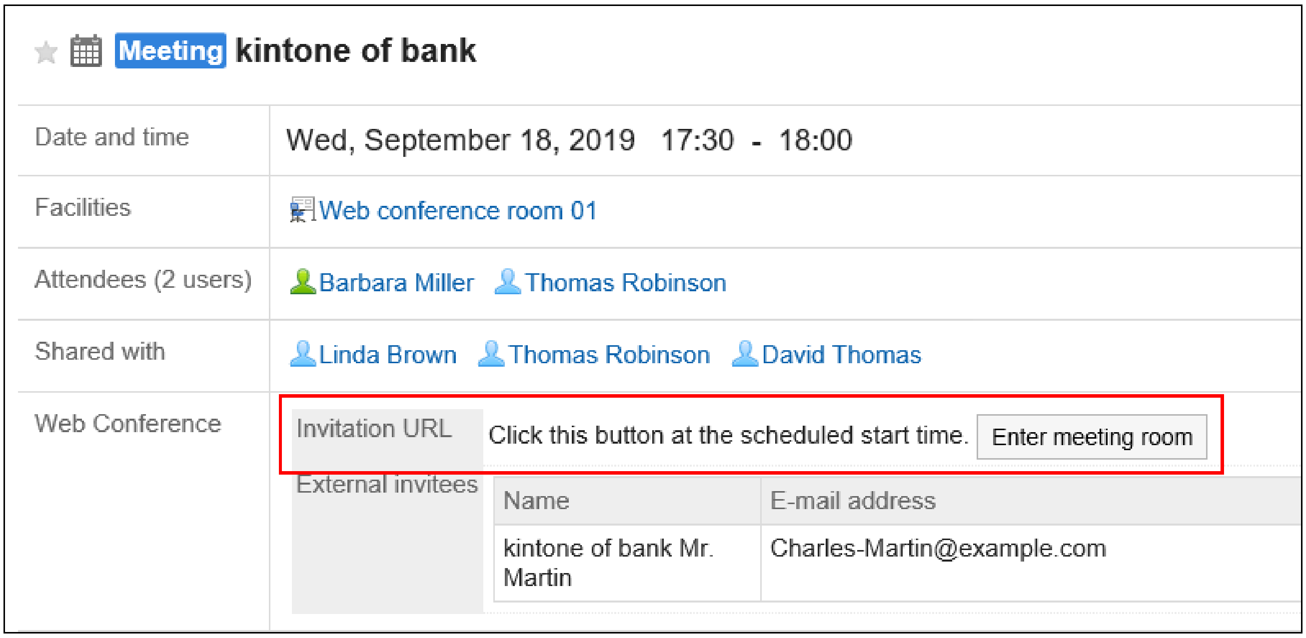
7. **In "V-CUBE Meeting version" field, select the version of your V-CUBE Meeting.**

The following items can be selected:

- V-CUBE Meeting 5
- V-CUBE Meeting 4

8. **Set "Invitation URL" field.**

When you select "show URL on the details screen" check box, "Appointment details" screen for attendees of the appointment shows a message and a button to enter the conference room.



9. **Set "E-mail notifications" field.**

When you select "send E-mail notifications" check box, the attendees of the appointment receive e-mails with the Web conference room login URL.

10. Enter "Number of external invitee fields" field.

Enter the number of external invitees to be displayed on "New appointment" screen and the screen to change appointments.

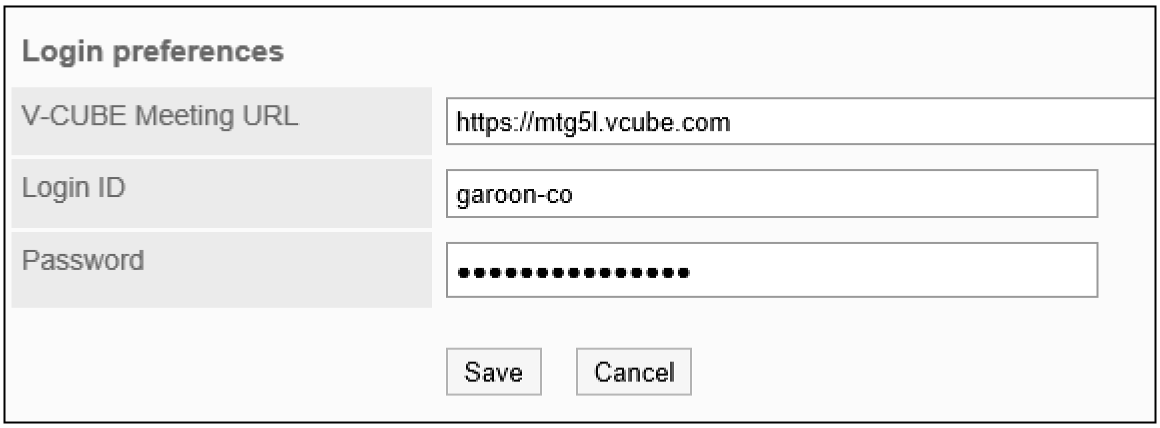
Example of a user screen when the number of lines is set to 3:

11. Enter the login settings.

Enter the information to set to Garoon took from V-CUBE Meeting.

The setting fields are as follows:

- V-CUBE Meeting URL:
  Enter one of the following URLs according to the version of your V-CUBE Meeting:
  - For V-CUBE Meeting 4:
    https://meeting.nice2meet.us
  - For V-CUBE Meeting 5:
    https://mtg5l.vcube.com
- Login ID:
  Enter the login ID to enter the Web conference room.
- Password:
  Enter the password to enter the Web conference room.



12. Confirm your settings and click "Save".

Adding Web Conference Rooms

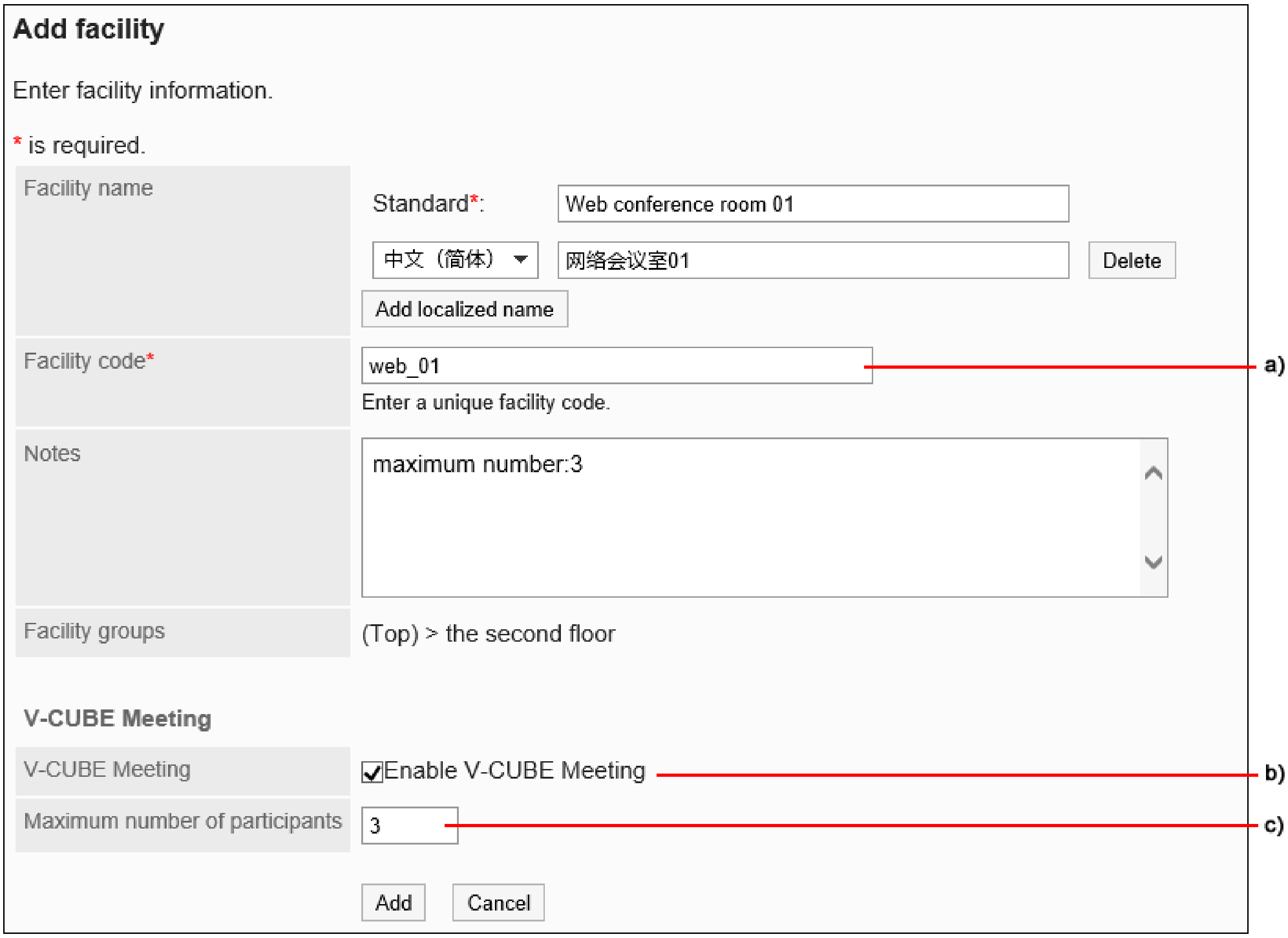
Add the Web conference room for V-CUBE Meeting as a facility in Garoon.

This setting allows you to reserve the WEB conference room for V-CUBE Meeting on Garoon Scheduler.

The procedure for Adding Facilities(880Page) is similar to the one for regular facilities.

In addition to regular facility information, you must enter fields related to V-CUBE Meeting.

Example of adding a facility screen:



a): Enter the Facility code (conference room ID) or the Room key.

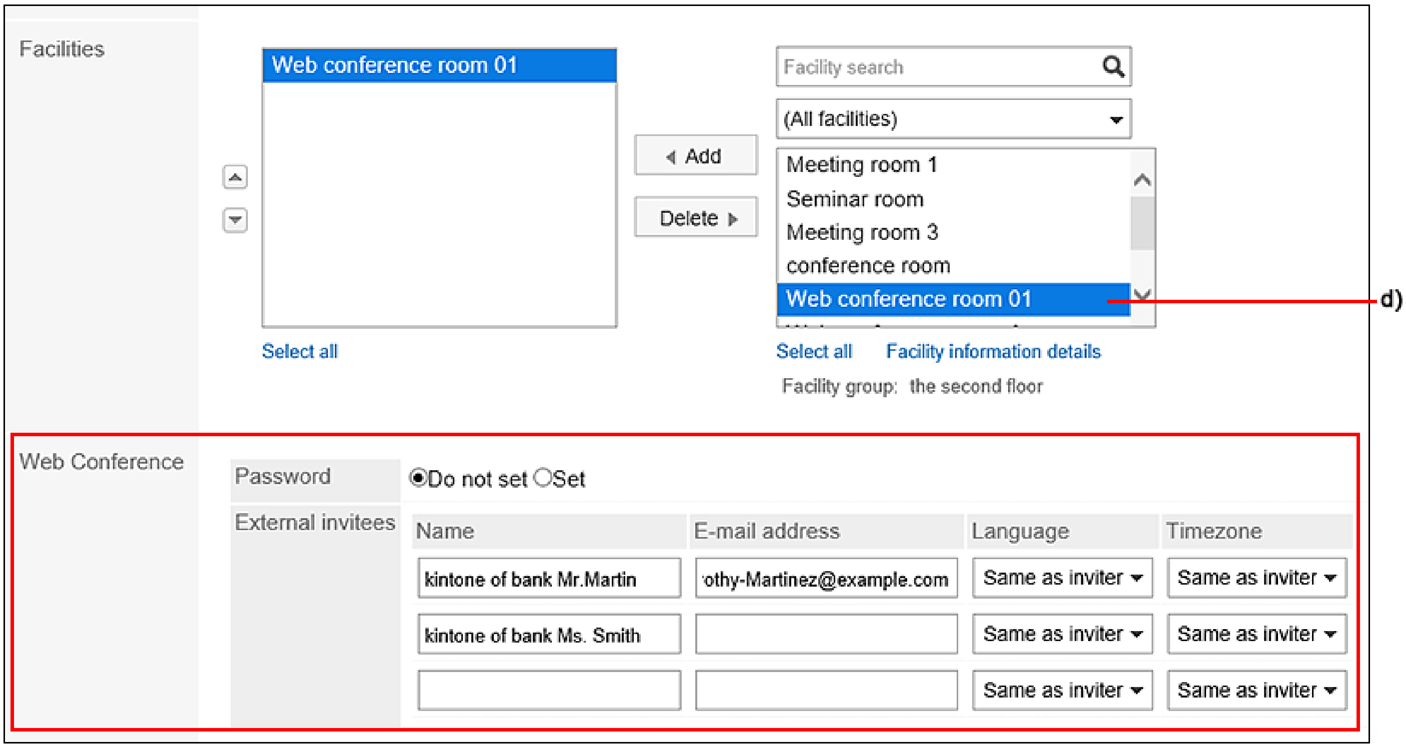
b): Select the check box to connect to.

c): Enter the maximum number of attendees who can join in one WEB conference. Enter 999 if you do not need to limit the number of attendees.

Caution

- When the total attendees of Garoon and external invitees exceeds the number of users who can join the V-CUBE Meeting, the appointment cannot be added or changed.

Example of "New appointment" screen



d): When you select the WEB conference room added to Garoon, the Web Conference field appears on the "Appointment details" screen.

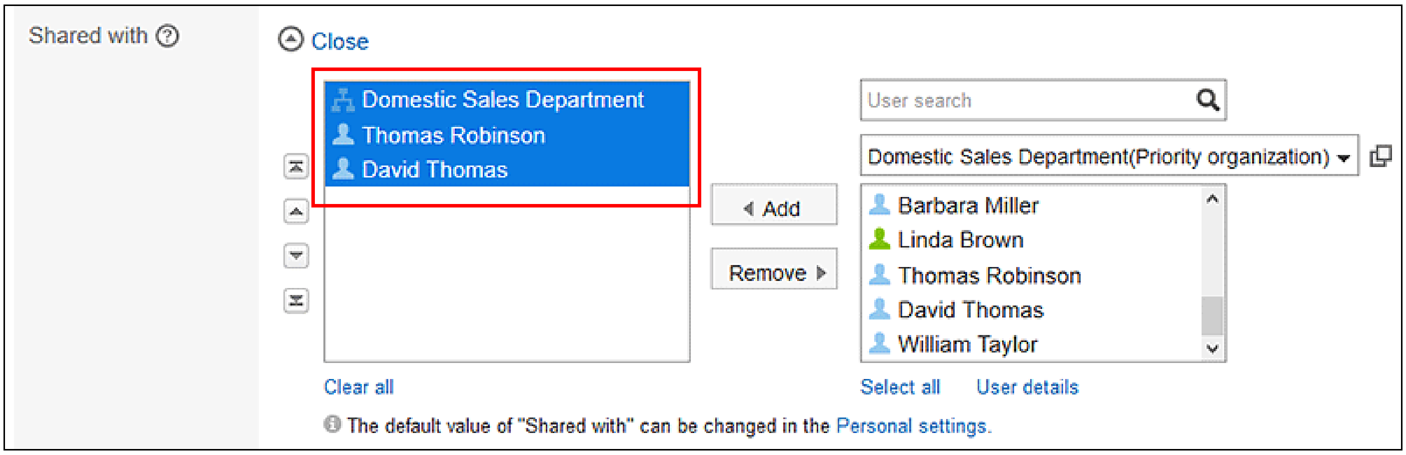
2.4.11. Setting up Default Shared with Users of Scheduler

Update Information

- November 2021:
  - In Garoon version 5.9.0 and later, "Watchers" is renamed to "Shared with" in Scheduler.

You can specify users, organizations, or roles as the default value of "Shared with" field in the "New appointment"screen.

For example, if you want to always share the president's appointments with fixed members such as executives and secretaries, you can set them as the default values so that specifying "Shared with" for each new appointment is not required.



Note

- Users can change the "Shared with" users when they add a new appointment.
- In your personal settings, you can set the default values for Shared with.

Adding Default "Shared with"

You can set the default "Shared with" users for each user.

Caution

- If an appointment has a large number of "Shared with" users, the processing of adding, editing, and deleting the appointment may be delayed.
  We recommend you to reduce the number of "Shared with" users, or configure the following settings if you allow users to specify organizations/roles for the "Shared with" field(842Page) in General settings of Scheduler and assume that a large number of "Shared with" users will be specified.
- General settings for Scheduler
  In the "Notifications to the "Shared with" users" field, select "Do not send notifications to the "Shared with" users" check box.
  For details, refer to the how to set up notifications to "Shared with" users(843Page).

Steps:

1. Before configuring default values for "Shared with" users, ensure that the following preparations are completed:

- **Permissions to select roles**

  To allow users to set roles to default values for "Shared with" users, you also need to allow the users to select roles on the "Role settings" page.

  For details, refer to Role Permissions(126Page).
- **Specify organizations/roles for the "Shared with" users**

  To allow users to select organizations and roles as "Shared with" users, check that the "Allow" check box of "Specify organizations/roles for the "Shared with" users" field in "General Settings" screen of Scheduler is selected.

  For details, refer to Allowing Users to Specify Organizations/Roles for "Shared with" Users(842Page).

2. Click the administration menu icon (gear icon) in the header.

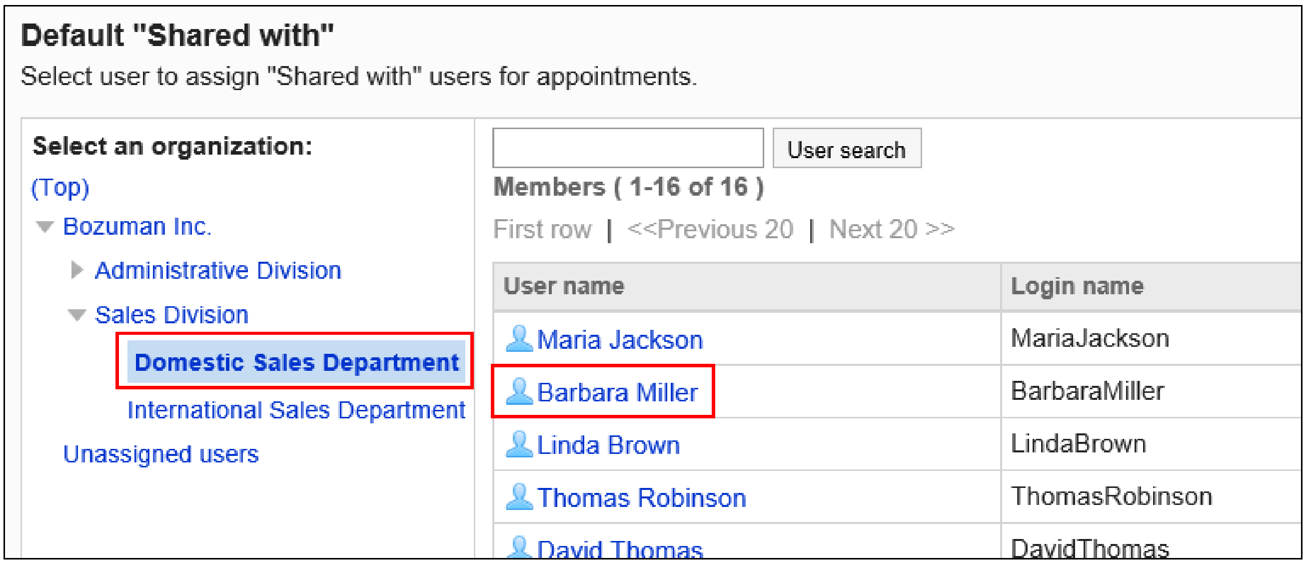
3. Click "System settings".

4. Select "Application settings" tab.

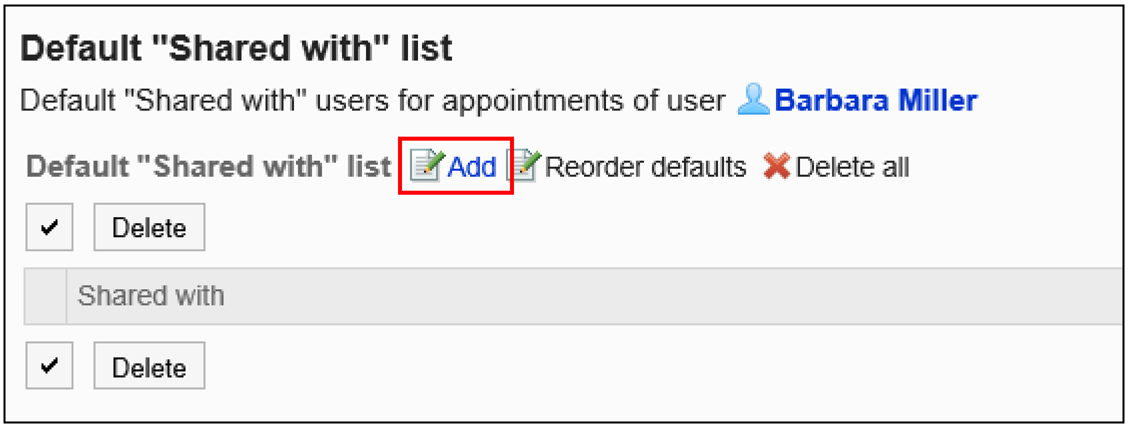
5. Click "Scheduler".

6. Click Default "Shared with".

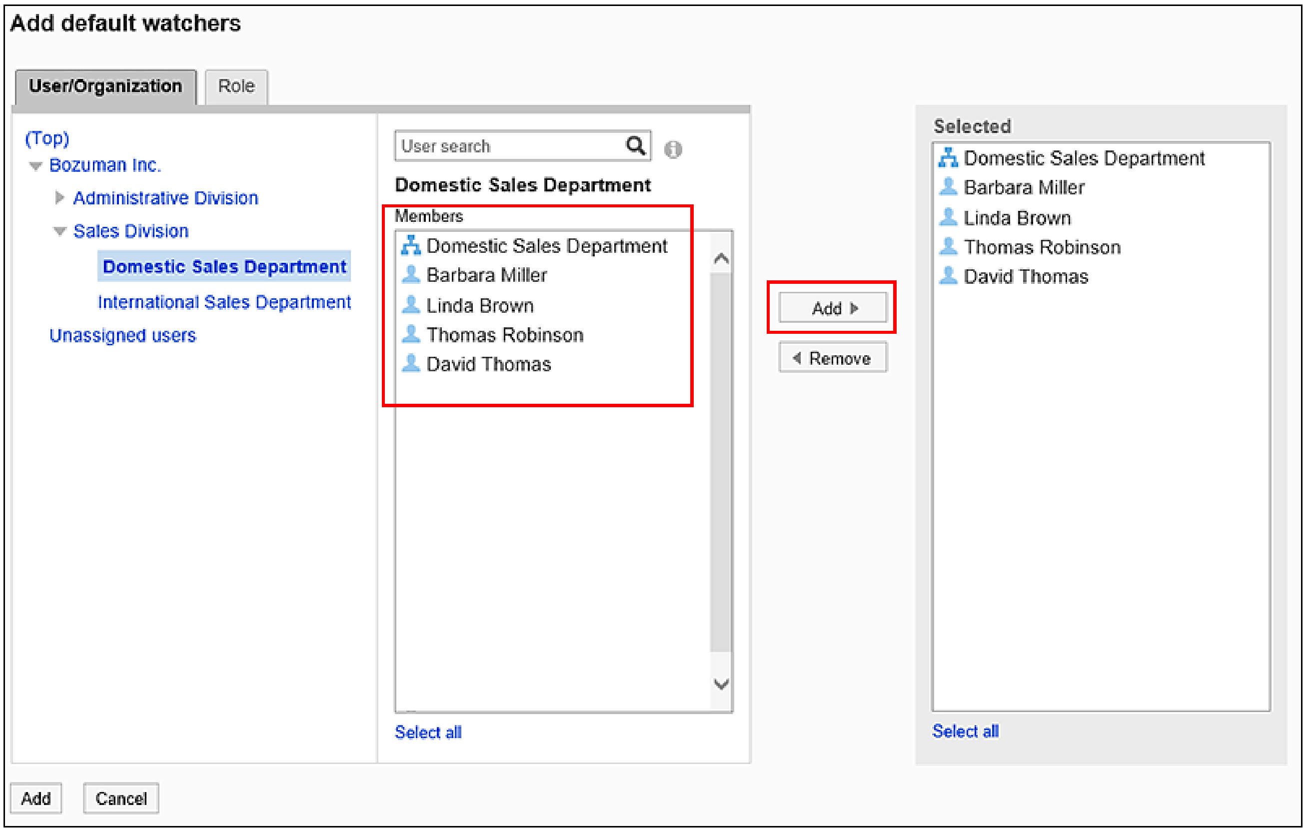
7. On the "Default Shared with" screen, select the organization, and then click the user name of the user to whom you set the default "Shared with".



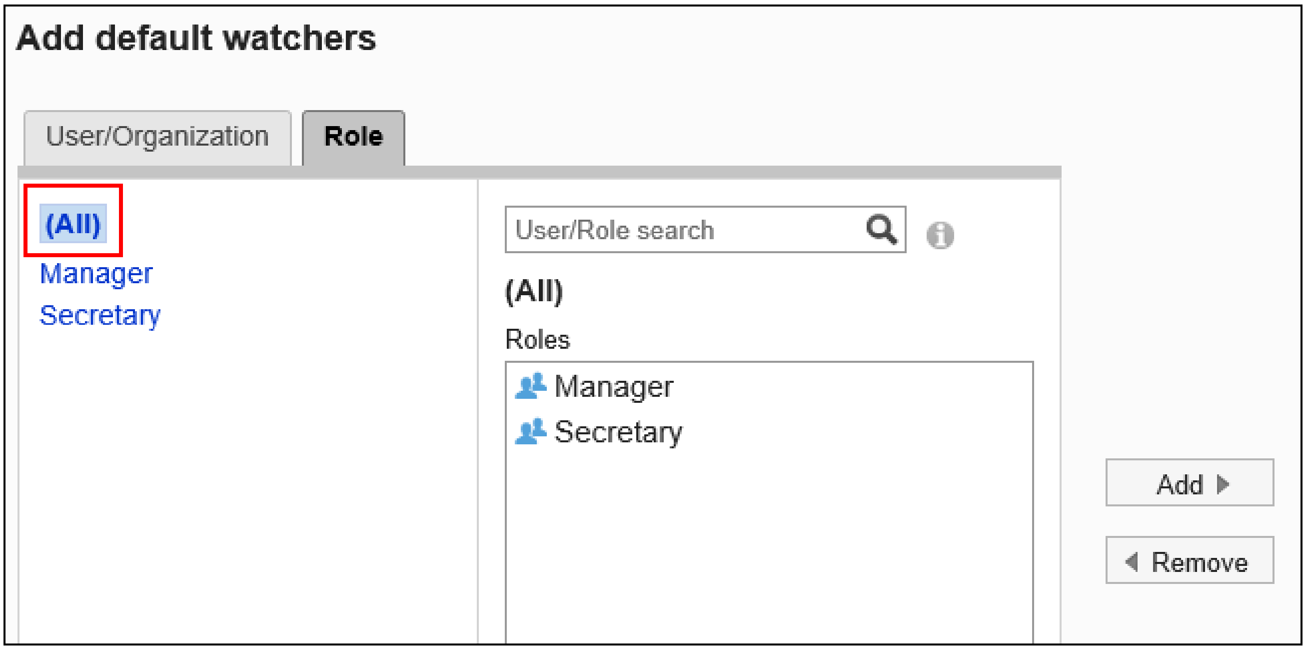
8. On the "Default Shared with list" screen, click Add.



9. **On "Add defaults" screen, select the user, organization, or role to set as the default "Shared with", and then click Add.**



If you do not allow users to "Specify organizations/roles for the "Shared with" users" in the General settings screen of Scheduler, organizations or roles specified as "Shared with" are disabled.
On "Organizations/Users" tab, selecting an department then searching for users allows you filter the scope of the search to the department and its child departments. When you click "(All)" on the "Role" tab, all roles used in Garoon are displayed selected.
You cannot select the "Administrators", "Everyone", and "LoginUser" roles.



10. **Check the selections and click "Add".**

Reordering Default "Shared with"

For each user, you can reorder the default "Shared with" users of the appointments.

Users can reorder the "Shared with"users when they add their appointment.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

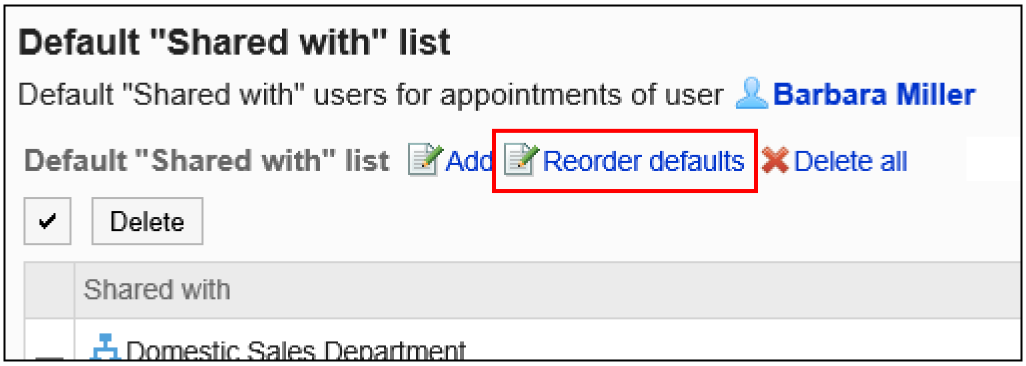
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click Default "Shared with".**

6. **On the "Default Shared with" screen, select the organization, and then click the user name of the user for whom you reorder default "Shared with" users.**

7. **On the "Default Shared with list" screen, click "Reorder defaults".**



8. **On "Reorder default watchers" screen, reorder users, departments, or roles.**

9. **Confirm your settings and click "Save".**

Deleting Default "Shared with"

You can delete the default "Shared with" users.

Caution

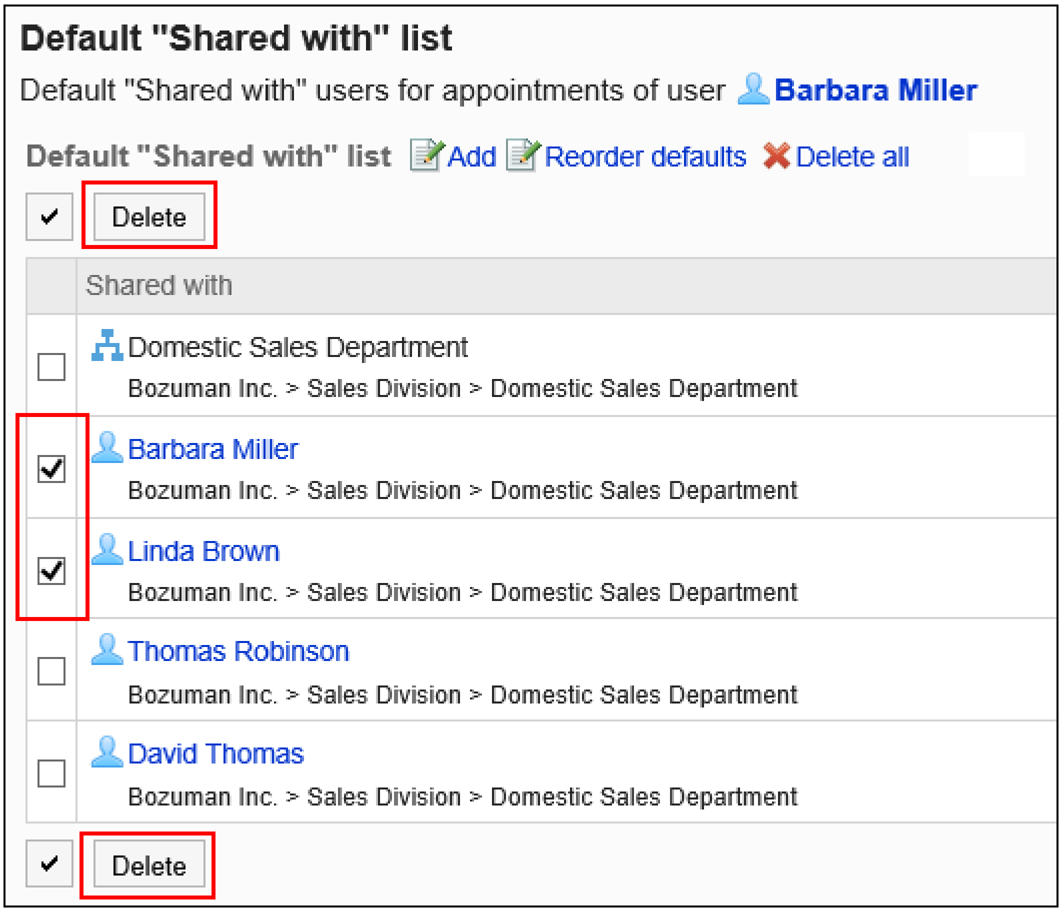
- After deleting default values, they cannot be restored.

Selecting Default "Shared with" to Delete

Select default "Shared with" to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click Default "Shared with".**
6. **On the "Default Shared with" screen, select the organization, and then click the user name of the user of whom you delete default "Shared with" users.**
7. **On the "Default Shared with list" screen, select the check boxes of default "Shared with" users, and then click Delete.**



8. **Click "Yes" on "Delete default watchers" screen.**

Deleting All Default "Shared with"

Delete all default "Shared with" users.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

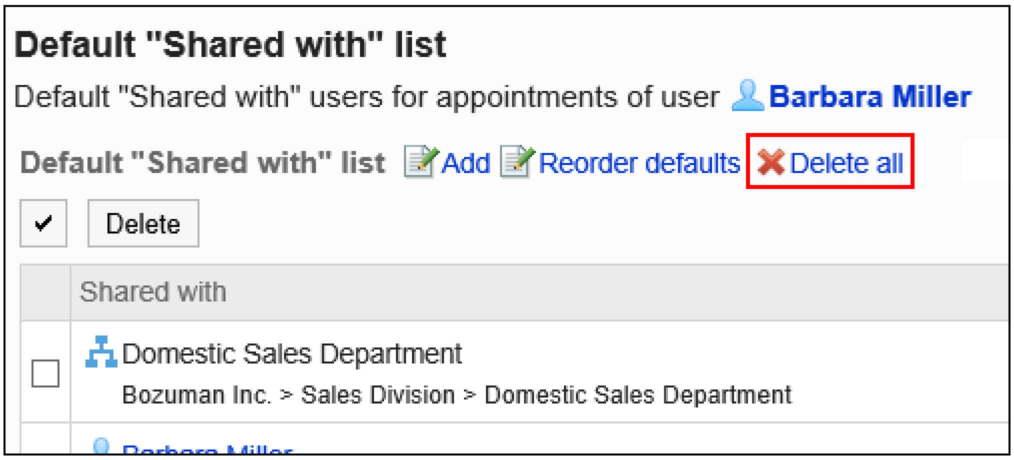
3. **Select "Application settings" tab.**

4. **Click "Scheduler".**

5. **Click Default "Shared with".**

6. **On the "Default Shared with" screen, select the organization, and then click the user name of the user of whom you delete default "Shared with" users.**

7. **On the "Default Shared with list" screen, click Delete all.**



8. **Click "Yes" on "Delete all default watchers" screen.**

2.4.12. Deleting Appointments

Delete all appointments created before the specified date and time.

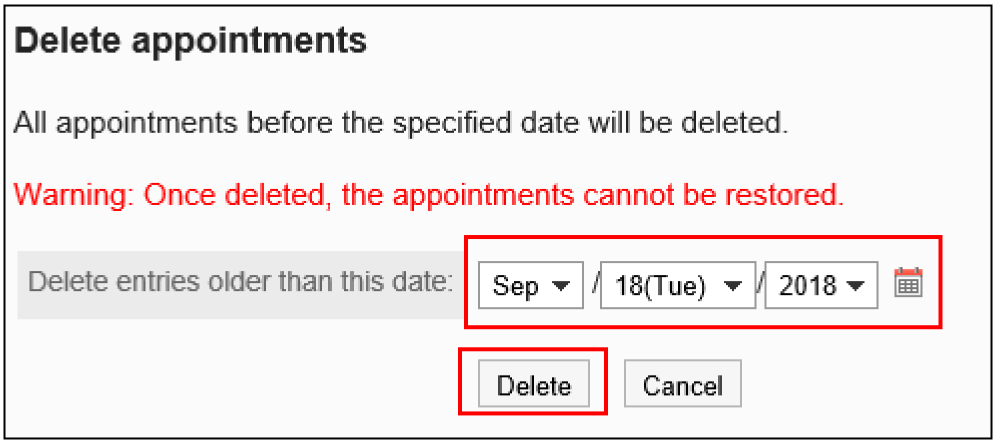
No update notification is sent for the actions on deleting all appointments.

Caution

- Once you delete appointments, they cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click to delete all schedulers.**
6. **On the screen to delete all schedulers, select a date, and then click "Delete". All schedules before the date will be deleted.**



7. Click "Yes" on the screen to delete all schedules.

2.4.13. Managing Scheduler Data Using CSV Files

Manage scheduler data using CSV files.

The following data can be managed using CSV files:

- Appointment
- Facility Information
- Facility Name
- Facility Group Information
- Facility Group Name
- Operational administrative privileges for facility groups
- Access Permissions
- Default "Shared with"

Note

- V-CUBE Meeting Connector settings cannot be exported to a CSV file.

Importing Data from a CSV File

Import scheduler data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. Create a CSV file to import data.

For information on items that can be managed in CSV files, refer to the topic about Scheduler(1835Page) CSV format.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Scheduler".**

6. **Click "Import from CSV file".**

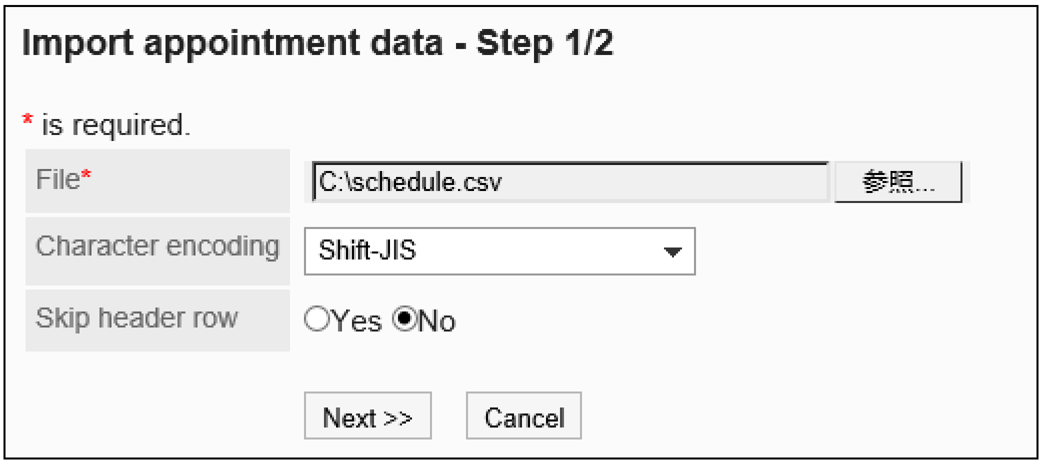
7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the data to import, and click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

Exports scheduler data to a CSV file.

Note

- When the appointment data is exported to a CSV file, the start and end dates are in the form of "YYYY/MM/DD".
- Repeating appointments are exported as regular appointments.
- You cannot export the following appointments:
    - All day
    - Private appointments

Steps:

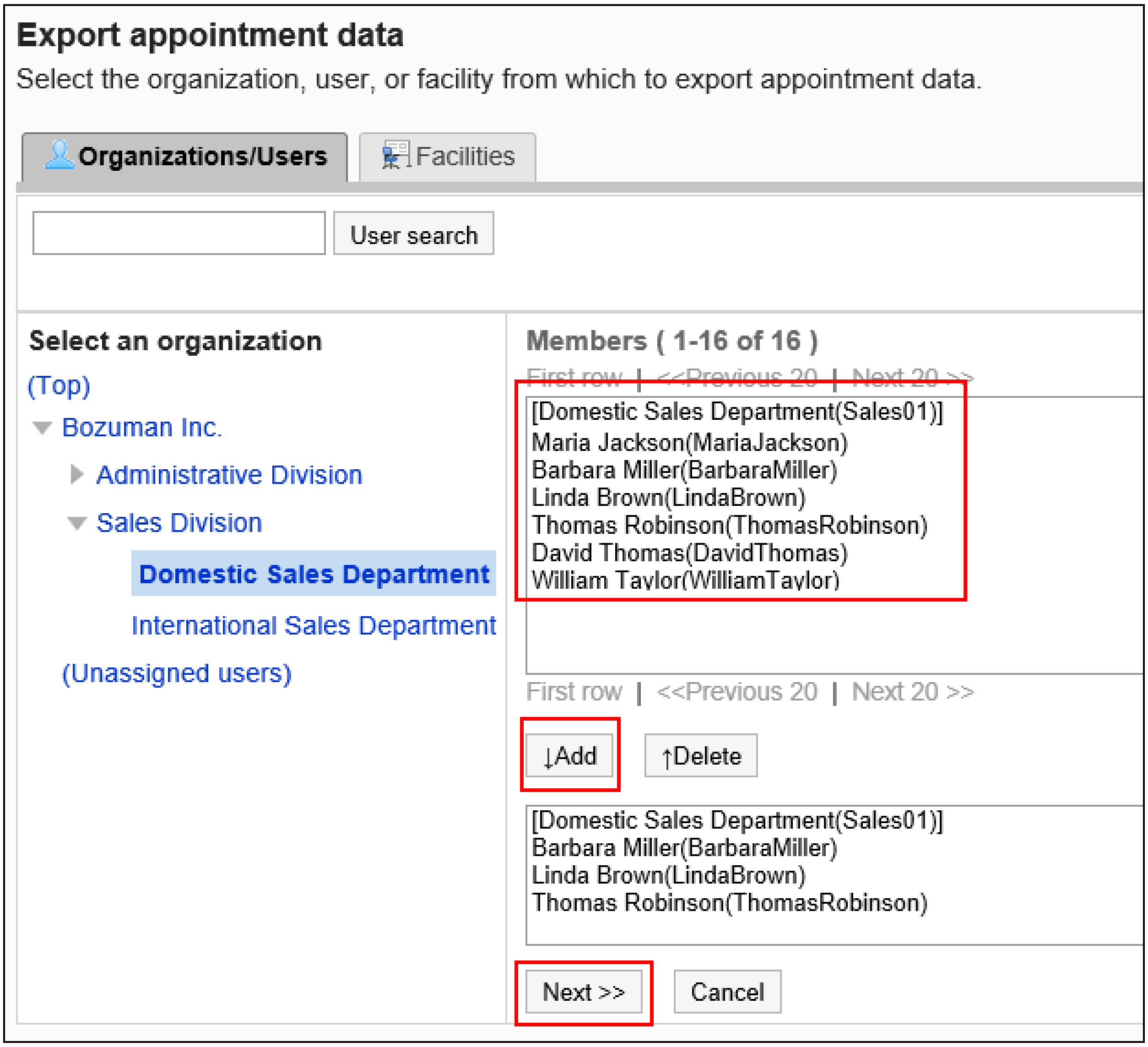
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Scheduler".**
5. **Click "Export to CSV file".**
6. **On the "Export to CSV File" screen, select the data to export.**

   To export appointment data, proceed to step 7.

   If the date to export is other than appointment data, proceed to step 8.

7. **To export appointment data, select the departments, users, or facilities to export appointments, then click "Add" and click "Next".**

   You can select multiple departments, users, and facilities.



8. Set the required items for the the data to export.

The setting fields are as follows:

- Period to export appointments:

  This field is displayed when you export appointments.

  Select the period of time of appointments to export.

- Character encoding:

  Select the character code that you want to use for encoding.

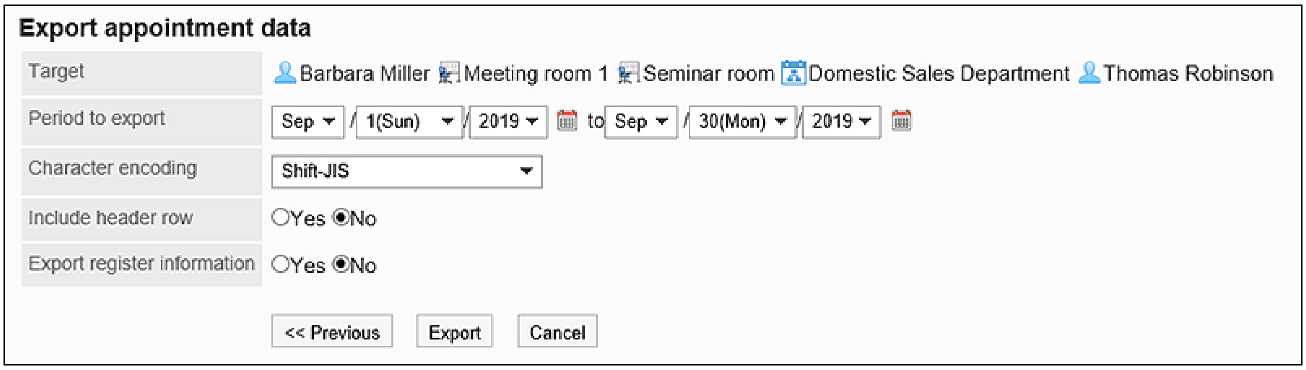
  The following character encoding can be selected:

  - Unicode (UTF-8)

    You can select with BOM as required.

  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".
- Export registrants:
  This field is displayed when you export appointments.
  To export appointment registrants to a CSV file, select "Yes".
- Language in which the data is exported:
  This field is displayed when you export facility names or facility group names.
  Set the language in which you export the facility names or facility group names. You can set multiple languages.
  The following languages can be selected:
  - All
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese
    Exported in Traditional Chinese.



9. **Confirm your settings and click "Export".**

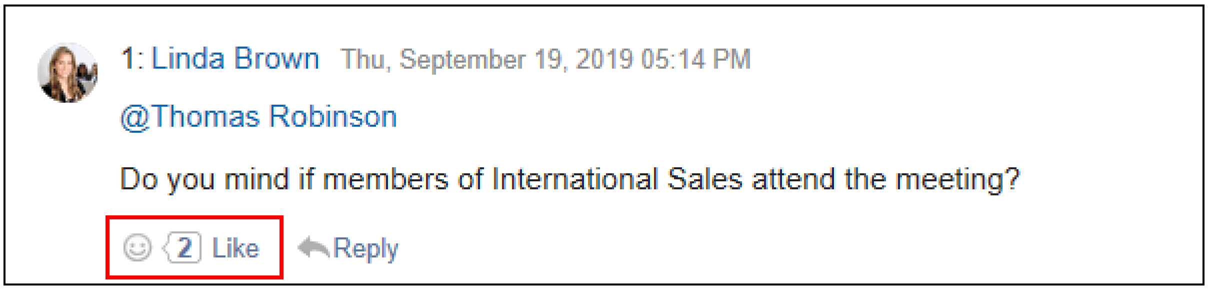
10. **Save the file with a function provided by your Web browser.**

2.5. Messages

Messages is an application for communicating among specific users.
For example, you can write an agenda and information in the body of the message and exchange opinions in the comment field.

Using Respond Feature

By using the respond feature, you can make a quick response to the message content or any comments.
Users can show their intention by clicking a link such as "Like" and "Acknowledged" without posting any comment.



The following settings can be configured on the screen for application lists for system administration or "General settings" page in Responses.

The following settings are available from the application list screen in system administration:

- Activating or deactivating the respond feature:
  For details, refer to the "Using Applications(206Page)" section.
- Changing the label of "Like":
  For details, refer to Respond(1647Page).

The following settings are available from "General Settings" page in system administration responses:

- Allowing to use the respond feature in Bulletin Board:
  For details, refer to General Settings for Responses(1648Page).

2.5.1. General Settings for Messages

On "General settings" screen of messages, you can set basic functions for messages.

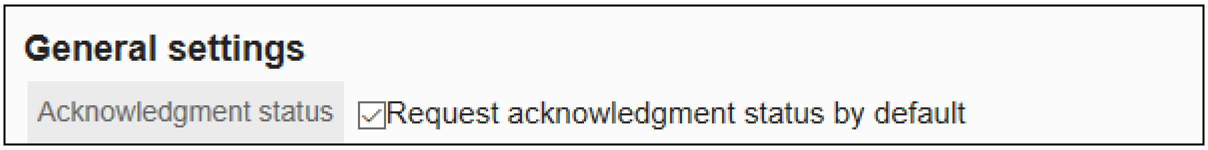
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Messages".**

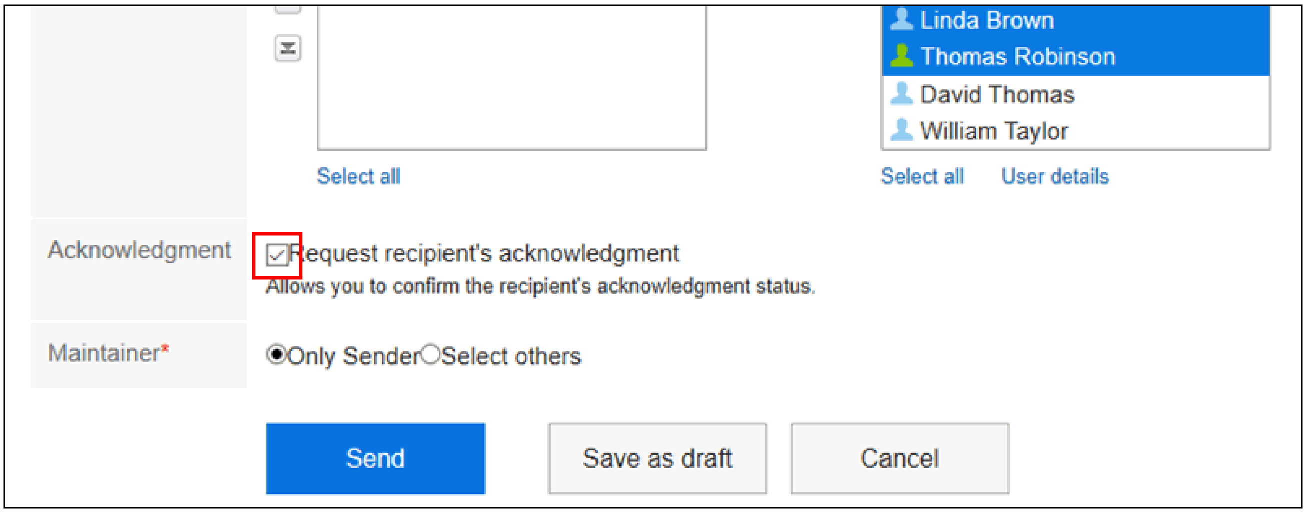
5. **Click "General Settings".**

6. **On "General settings" screen, set "Acknowledgment status" initial status in "Request acknowledgment status by default" field.**

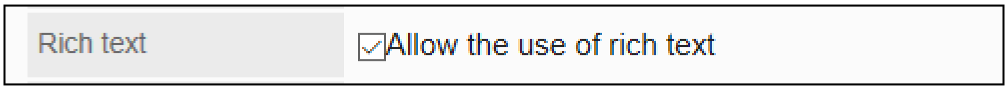
By using Acknowledgment status, you can check when the users who set as message recipients see the message.



If you select the check box for "Request responses", the check box for "Request acknowledgment status by default" is selected on the screen to create messages.



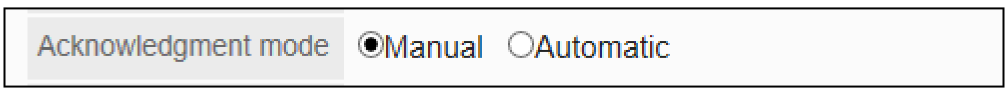
7. **In the field to allow to use Rich Text Formatting, select whether to allow the feature.**



8. **In the acknowledgment status operation mode field, you can set when a message set acknowledgment status is treated as viewed message.**

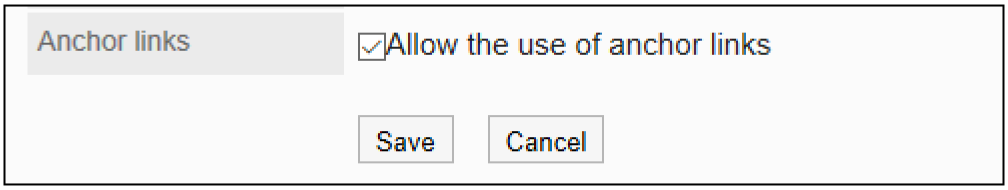
Select one of the following fields:

- Manual:
  When the recipient clicks the confirmation on the message details screen, the messages are treated as read messages.
  For details, refer to Acknowledgment Status.
- Automatic:
  When the recipient shows the message details screen, the messages are treated as read messages.



9. In "Allow the use of anchor links in comments" field, set whether to allow using the anchor feature in comments.

The anchor feature is a feature that creates links to comments by describing numbers, for example ">>2" to comment number 2.



If you allow using the anchor function, the anchor function can also be used for messages created before.

10. Confirm your settings and click "Save".

2.5.2. Deleting Messages in Bulk

Deletes all messages that have not been updated since the specified date.

Messages meeting the following conditions will be deleted including the drafts and the messages which are not addressed to you.

- The sent date is older than the specified date.
- The following actions have not been done since the specified date.

- Updating the body of the message
- Post comments
- Deleting comments

Caution

- Deleted messages cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

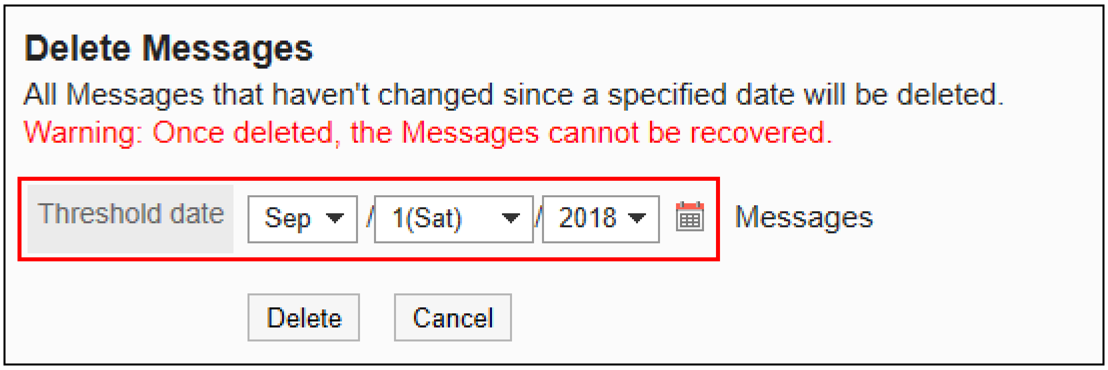
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Messages".**

5. **Click to delete all messages.**

6. **On the delete all messages in bulk screen, set the date field to delete messages.**



Messages updated after the selected date will not be deleted.

Example: If you select March 15, 2017, as the "Threshold date" for deletion

- Messages updated on March 14, 2017: Deleted
- Messages updated on March 15, 2017: Not deleted

7. **Click "Delete".**

8. Click "Yes" on the delete all screen.

2.5.3. Searching Messages

Search the message to show details.
System administrators or application administrators can view all messages that do not have them as recipients.
However, they cannot view draft messages.

Steps:

1. Click the administration menu icon (gear icon) in the header.

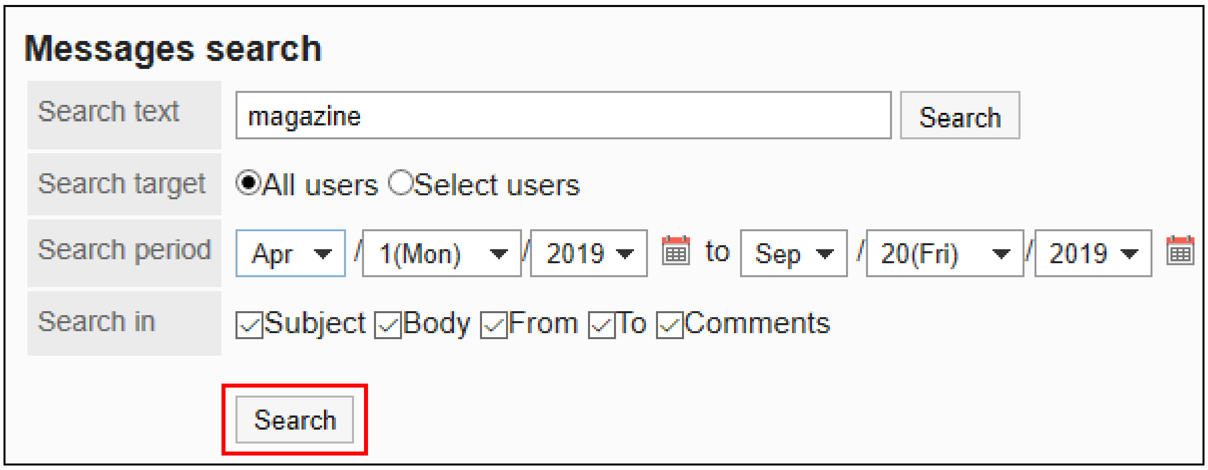
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Messages".

5. Click to search messages.

6. On the screen to search messages, set search conditions and click "Search".



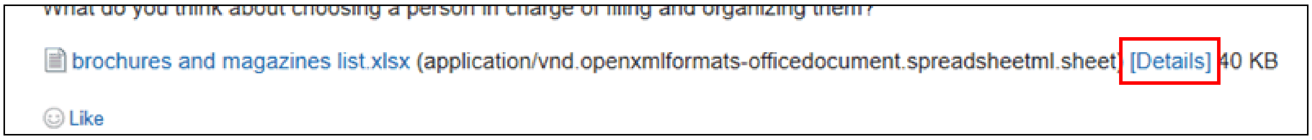
Message Search Conditions

Search Conditions	Description
Search string	Enter keywords to search in search fields.
Target users	It searches for message senders and comment senders. You can select one of the following options: The default value is "All users". • All users • Select users If you select Select users, you also select the target users.
Search period	Set the search period on the last updated date. The default value is three months ago to today.
Search items	Sets the items to search by keywords. The following items can be set: By default, all items are selected. • Subject • Body • From • Recipients • Comment

7. **In the "Search Results" section, click the subject of the message to view the contents.**

Note

- On the message details screen, clicking "Details" on the attachment displays the attachment details screen.
  On the attachment details screen, you can update, delete, and change file information.
  For details, refer to the following page:
  Updating Files
  Changing File Information
  Deleting Files

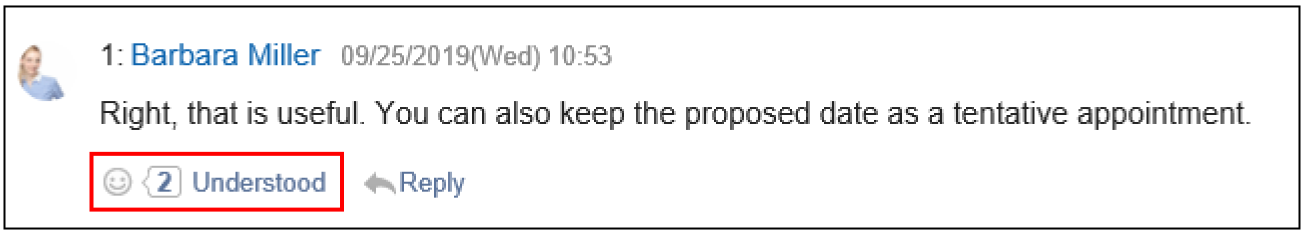


2.6. Bulletin Board

Bulletin Board is an application to use to broadly communicate information to employees all at once. You can create categories for each department or purpose and post your messages and information related to your business.

Using Respond Feature

By using the respond feature, you can make a quick response to the message content or any comments.
Users can show their intention by clicking a link such as "Like" and "Acknowledged" without posting any comment.



The following settings can be configured on the screen for application lists for system administration or "General settings" page in Responses.

The following settings are available from the application list screen in system administration:

- Activating or deactivating the respond feature:
  For details, refer to the "Using Applications(206Page)" section.
- Changing the label of "Like":
  For details, refer to Respond(1647Page).

The following settings are available from "General Settings" page in system administration responses:

- Allowing to use the respond feature in Bulletin Board:
  For details, refer to General Settings for Responses(1648Page).

References

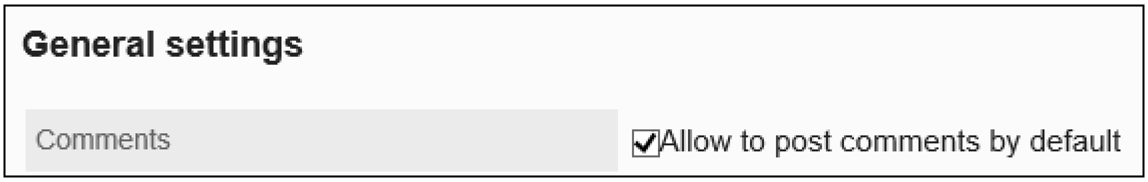
- General Settings of Bulletin Board(949Page)
- Setting categories(952Page)
- Setting Operational Administrative Privileges for Categories(962Page)
- Setting Access Permissions for Categories(967Page)
- Notification Settings(984Page)
- Managing Topics(992Page)
- Posting Topics

2.6.1. General Settings of Bulletin Board

On "General settings" screen of bulletin board, you can set basic bulletin board functions.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "General Settings".**
6. **On "General settings" screen, set the initial state of allowing permissions to post comments in the field.**



If you select the check box for "Request responses", the check box for allowing to post comments is selected on the screen to post topics.

7. **In the field to allow to use Rich Text Formatting, select whether to allow the feature.**

8. **In "Allow the use of anchor links in comments" field, set whether to allow using the anchor feature in comments.**

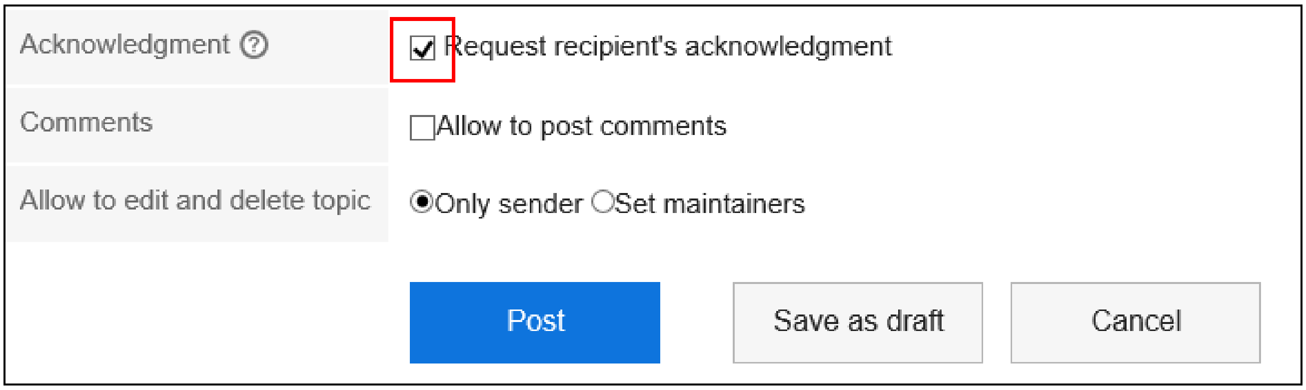
The anchor feature is a feature that creates links to comments by describing numbers, for example ">>2" to comment number 2.

If you allow using the anchor function, the anchor function can also be used for topics created before.

9. **In "Request acknowledgement status by default" field, set the initial status of "Acknowledgment status".**

By using Acknowledgment status, you can check when the users configured as notification recipients of the topic see the topic on the Bulletin.

If you select the check box for "Request responses", the check box for "Request acknowledgment status by default" is selected on the screen to post topics.



Note

- Only the users who have the right to view the topic can check the acknowledgement status. In the system administration or the operational administration settings, the acknowledgement status is not displayed on the topic details screen.

10. In "Manually enter "From" name" field, select the default value for "From".

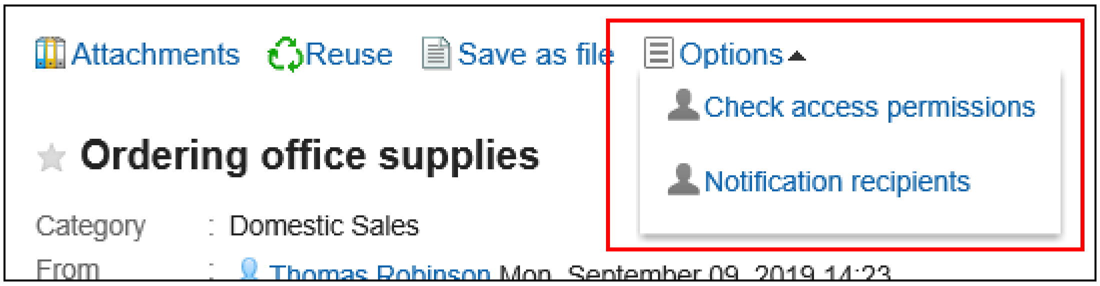
When users are allowed to manually enter "From" name, any name, such as an organization name, can be assigned to the sender instead of the user name.

You can select whether to use user names or alternate names in the post topics or change topics screens.

When users are not allowed to manually enter "From" name, the creator's name whose posted a new topic will be displayed as the sender of the topic.

11. You can set whether to allow access permissions and notification recipients in the "Access permissions and notification recipients" field.

If you allow users to use "Access permissions and notification recipients", they can check their permissions and notification recipients in the the option in the screen for topic details.



Note

- In the "Check access permissions" dialog box, the user rights settings for the Bulletin Board category are applied.
  If the security model is "GRANT (Only users on list have access)", the dialog shows allowed users, and if the security model is "REVOKE", the dialog shows restricted users.
- The following users are not displayed in the "Check access permissions" and "Notification recipients" dialog boxes:
  - Users not allowed to access Bulletin Board
  - Deleted users

12. Confirm your settings and click "Save".

2.6.2. Setting Categories

Set categories.

Adding Categories

Add categories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Setting categories".**
6. **On the "Setting categories" screen, select a category and click "Add Categories".**

7. **On the "Add Categories" screen, enter the "Subject" field.**

   You should set the default subject.

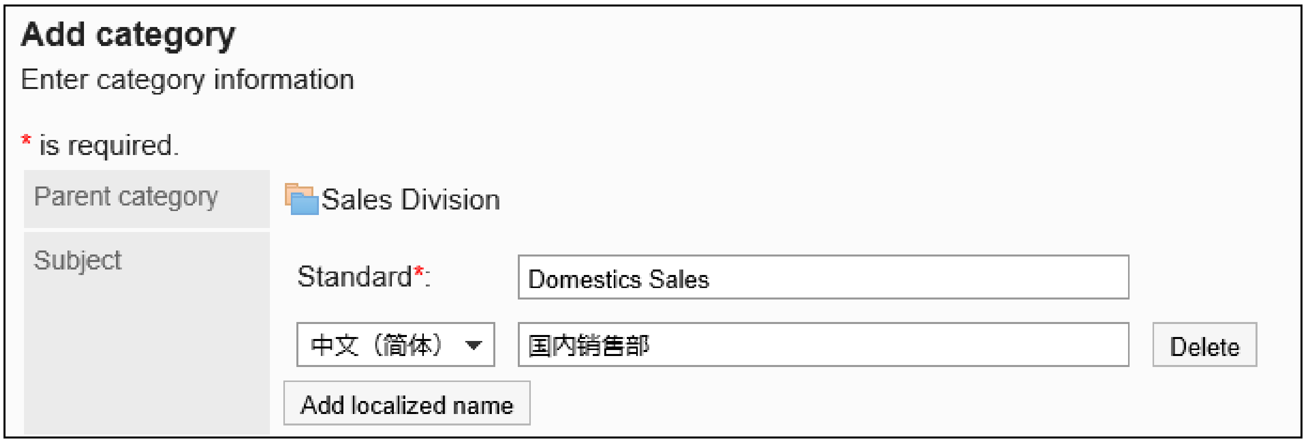
   Clicking "Add localized name" allows you to set subjects in multiple languages.

   If you do not set the subject in the user preference language, the default subject is displayed.

   The following languages can be set:

   - 日本語
   - English
   - Simplified Chinese
   - Traditional Chinese

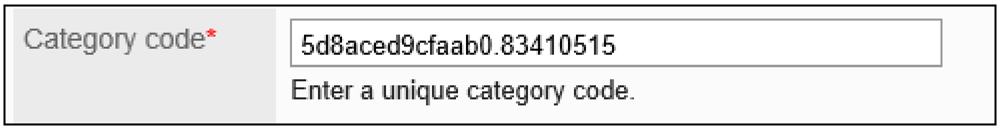
     Displayed in Traditional Chinese.



8. **Set the Category Code field.**

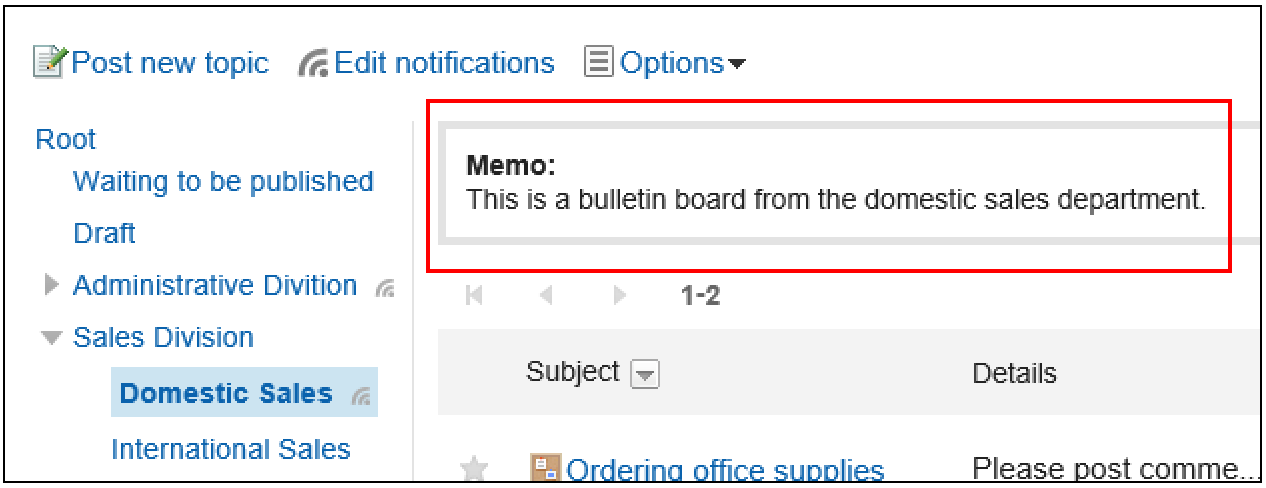
You should set the category code.

This is a unique code for identifying categories.



9. **Set the Notes field as needed.**

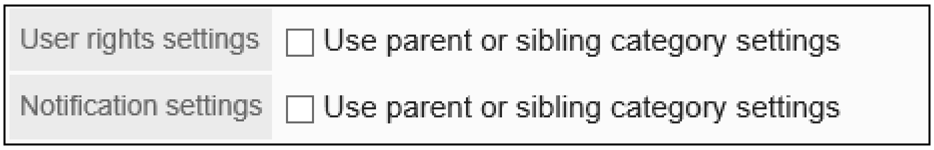
Enter a description of the category. When you set this field, notes are displayed on the category screen.



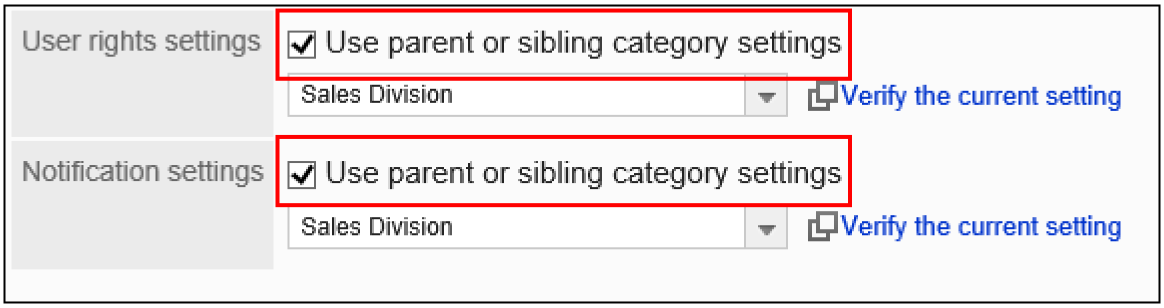
10. **In the "Access permissions" field and the "Notifications" field, select whether to apply the settings of a parent category, or other categories included in the same parent category.**

The default values have the values of its parent category or the parent's subcategory settings.

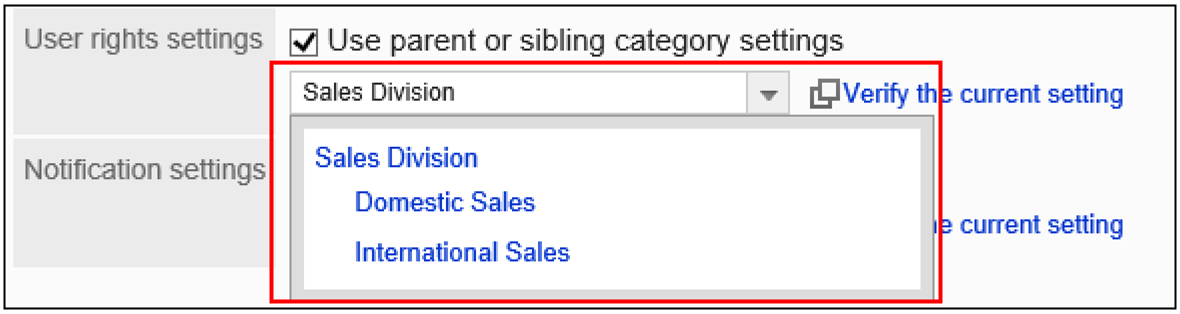
- **If you do not apply the parent category or the parent's subcategory settings to the category:**
  Clear the check boxes for applying permissions of parent category or parent's subcategory and applying notification settings of parent category or parent's subcategory.



- **If you apply the parent category or the parent's subcategory settings to the category:**
  Select the check boxes for applying permissions of parent category or parent's subcategory and applying notification settings of parent category or parent's subcategory.

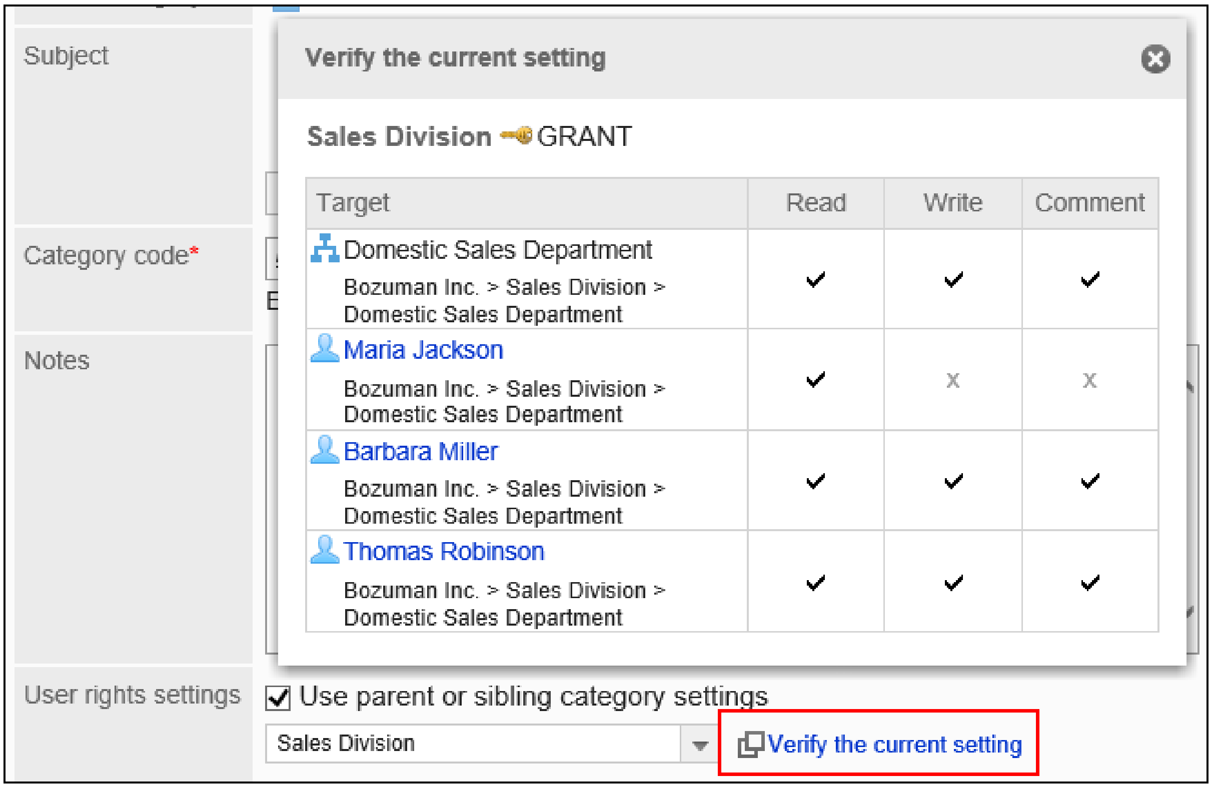


Select the category to apply the settings from the drop-down lists of user rights or notification settings.



Note

- Changing user rights and notification settings after applying them to categories doesn't affects the settings of the categories.
- If you want to check the settings of a category that you have applied from the drop-down list, click to check the settings for user rights or "Notification recipients".



11. Confirm your settings and click "Add".

Changing Categories

Change the settings for categories.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Bulletin Board".

5. Click "Setting categories".

6. On "Setting categories" screen, select a category and click the item for category details.

7. **On the screen for category details, click "Save".**

8. **On the screen to change categories, you can change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Moving Categories

Move the subcategory to another category.

The "root" category cannot be moved.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

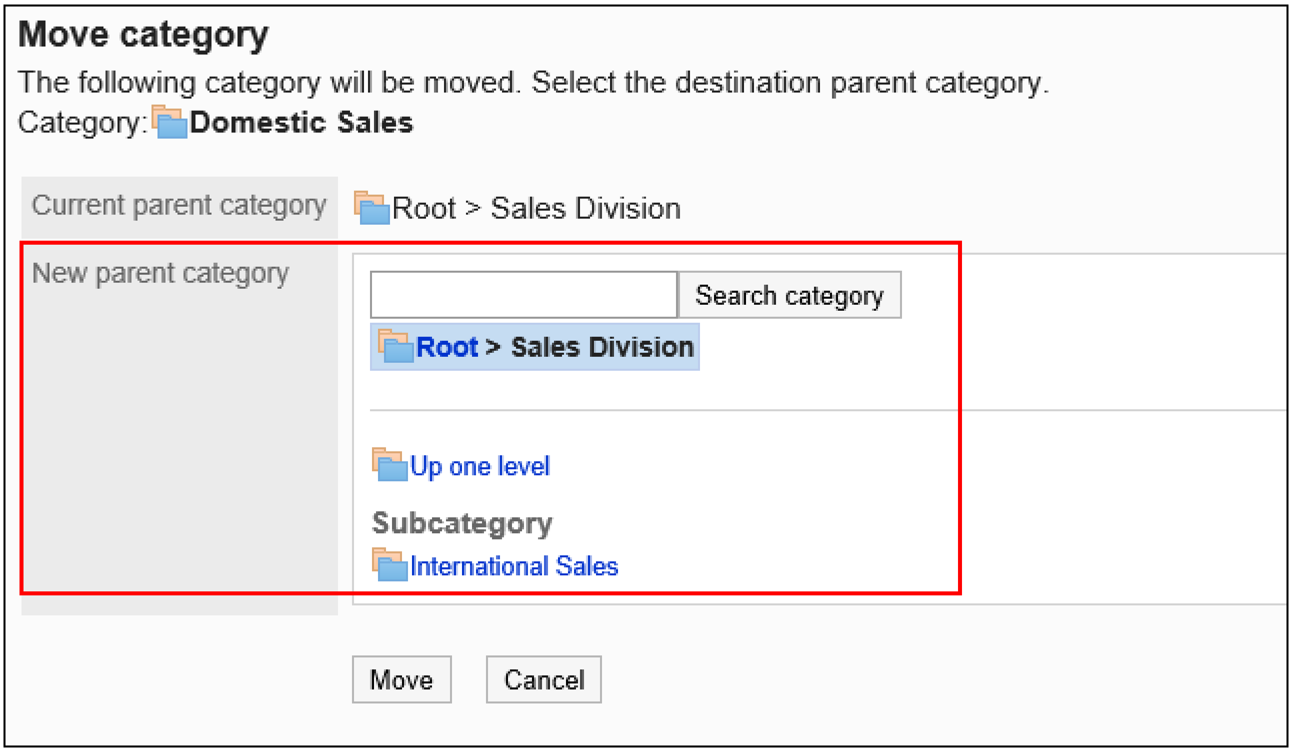
5. **Click "Setting categories".**

6. **On "Setting categories" screen, select a category and click the item for category details.**

7. **On the screen for category details, click "Move".**

8. **On the screen to move categories, select the category to move to parent category.**

You can search for categories to move categories into by entering keywords and clicking "Category search".
Clicking "Move up" moves the category up one level.
Clicking on a category name moves you to the subcategory of the category you clicked. Numbers represent the number of subcategories.



9. **Confirm your settings and click "Move".**

Reordering Subcategories

Reorder subcategories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

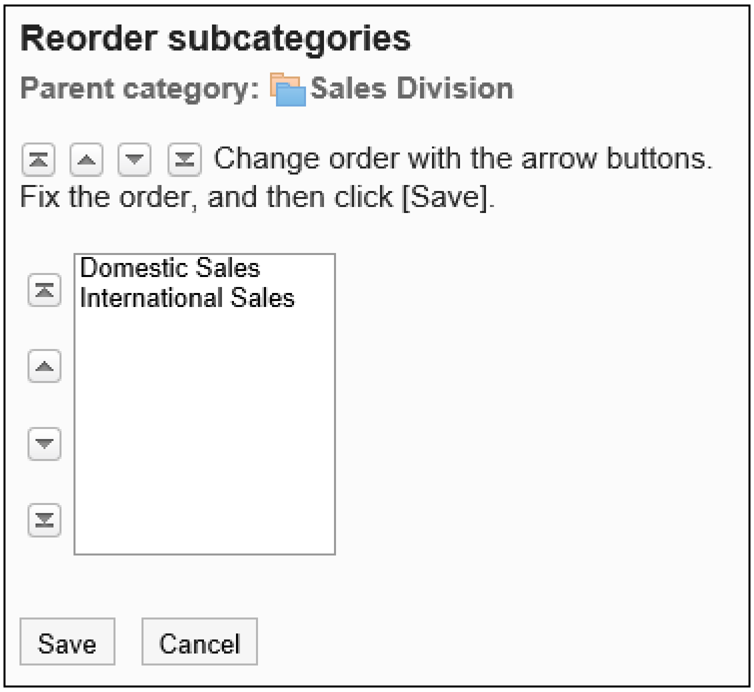
3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click the item for subcategory settings.**

6. **On "Setting categories" screen, select a category, and then click the item to reorder subcategories.**

7. **On the screen to reorder subcategories, reorder subcategories.**



8. **Confirm your settings and click "Save".**

Deleting Categories

Delete empty categories.

The following categories cannot be deleted:

- Root category
- Categories with topics or subcategories

Caution

- Deleted categories cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click "Setting categories".**

6. **On "Setting categories" screen, select a category and click the item for category details.**

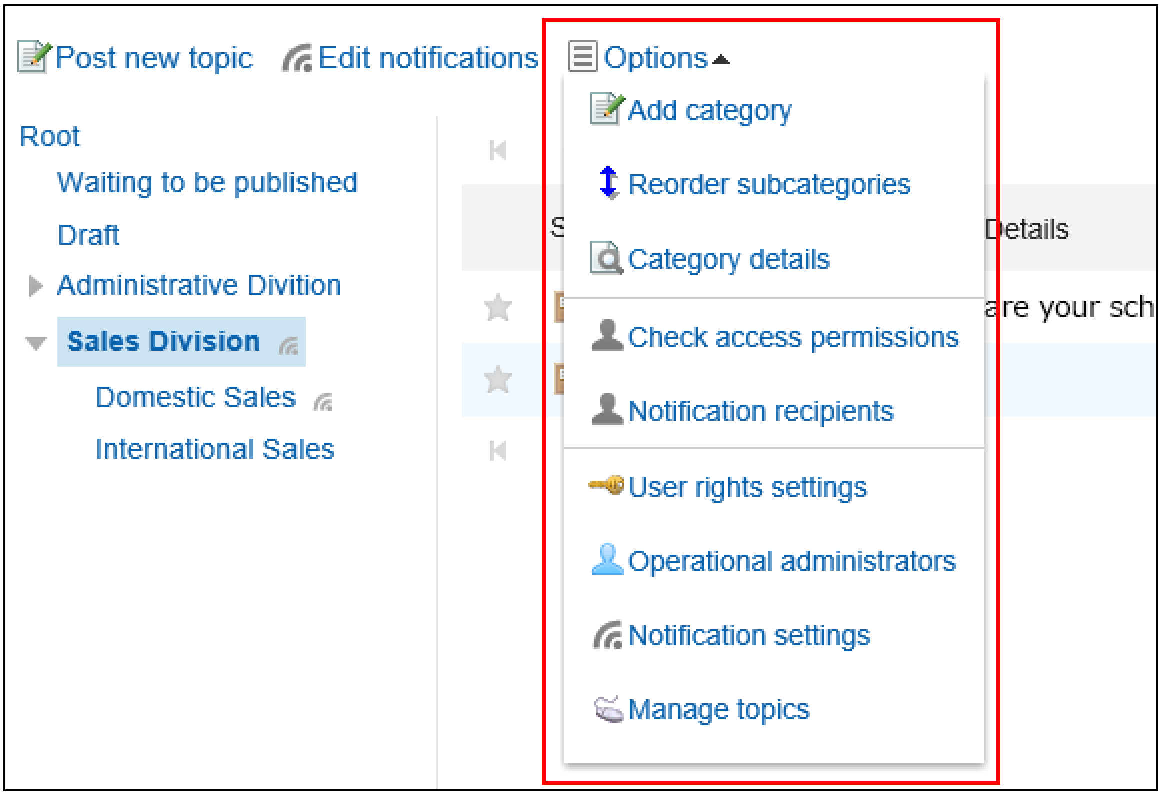
7. **On the screen for category details, click "Delete".**

8. **Click "Yes" on the page to delete categories.**

2.6.3. Setting Operational Administrative Privileges for Categories

Operational administrators are administrators who are granted operational administrative privileges to manage categories by the system administrator.

If you are assigned as an operational administrator, clicking the option icon on Bulletin Board screen displays categories and you can manage them and the Bulletin Board on the user screen.



Operational administrators can do the following tasks:

- Add categories:
  For details, refer to Adding Categories(953Page).
- Reorder subcategories:
  For details, refer to Reordering Subcategories(959Page).
- Category details:
  Displays the details of the selected category.
- User Rights settings:
  For details, refer to Setting Access Permissions for Categories(967Page).
- Operational administrators:
  Sets operational administrators for the selected categories.
- Notification settings:
  For details, refer to Notification Settings(984Page).
- Manage topics:
  For details, refer to Managing Topics(992Page).

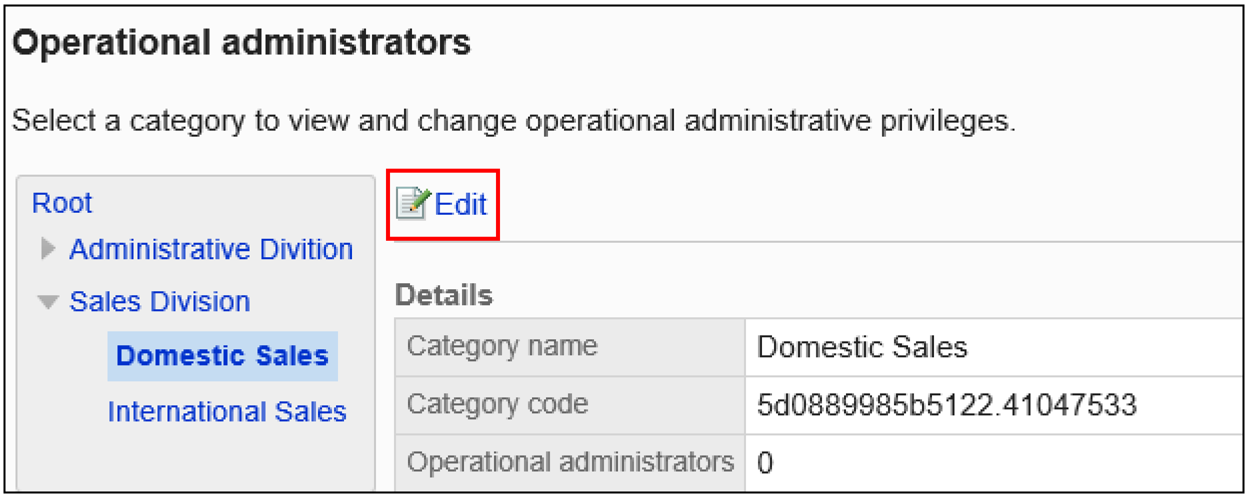
Adding Operational Administrative Privileges

Grant operational privileges for each category.

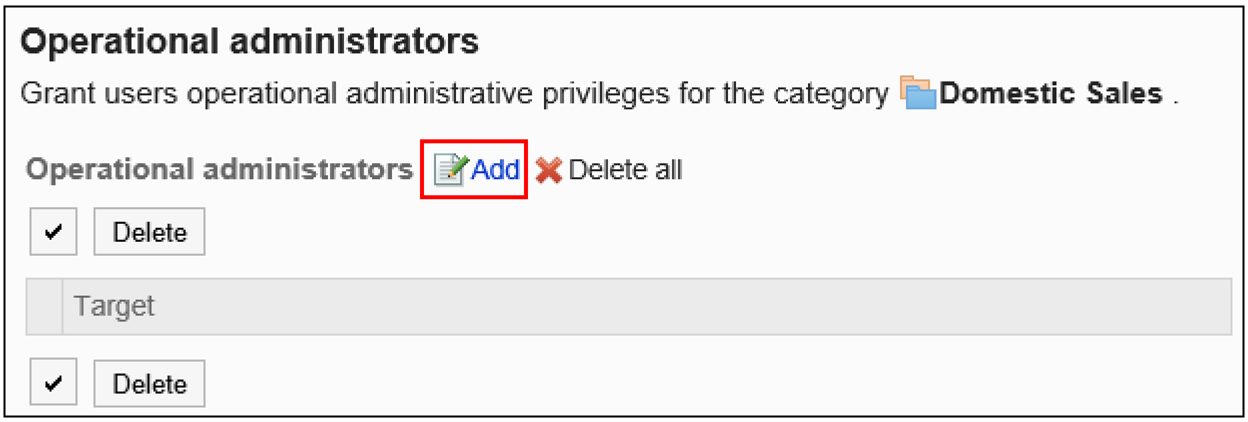
Operational administrative privileges are inherited by subcategories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Operational administrators".**
6. **On "Operational administrators" screen, select a category and click "Save".**



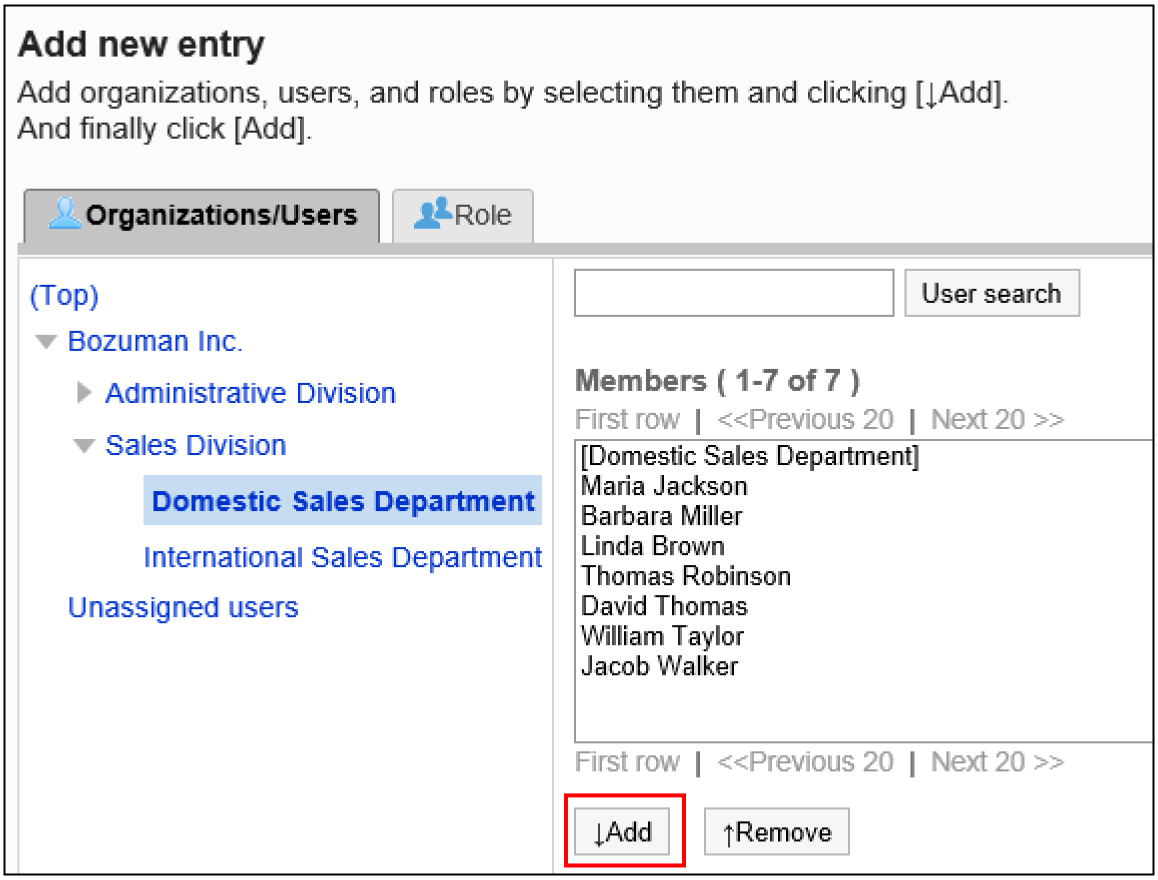
7. **On the screen for operational administrative privilege list, click "Add".**



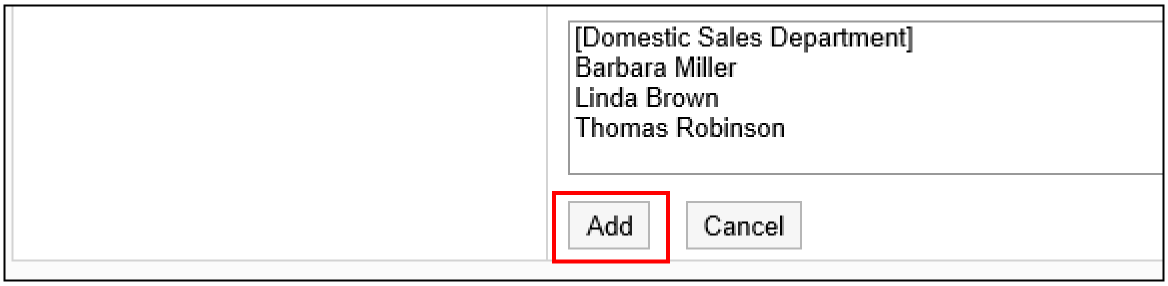
8. On the screen to add operational administrative privileges, select the department, user, or role to set privileges, and then click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. Click "Add".



Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

If you delete operational administrative privileges, users who have been deleted privileges will not be able to manage the categories and topics on their user screens.

Caution

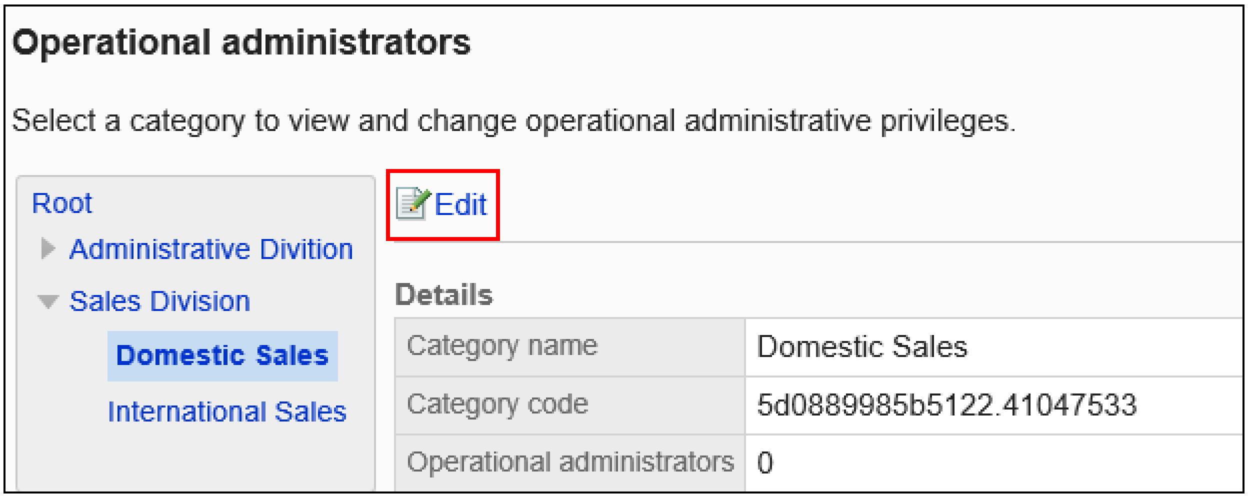
- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

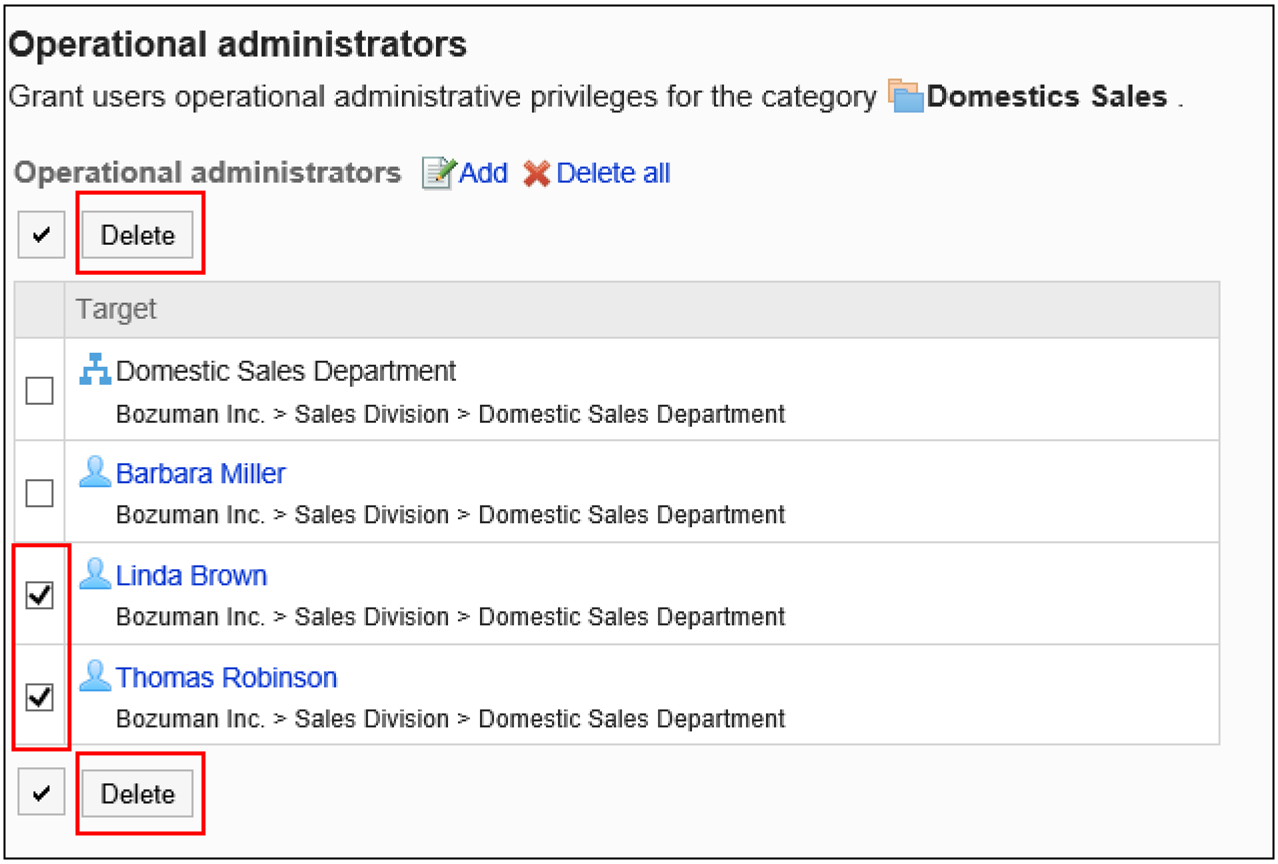
Select the operational administrative privileges to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Operational administrators".**
6. **On "Operational administrators" screen, select a category and click "Save".**



7. **On the screen for operational administrative privilege list, select the check boxes of the operational administrative privileges to delete, then click "Delete".**



8. Click "Yes" on the screen to delete all operational administrative privileges.

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. Click the administration menu icon (gear icon) in the header.

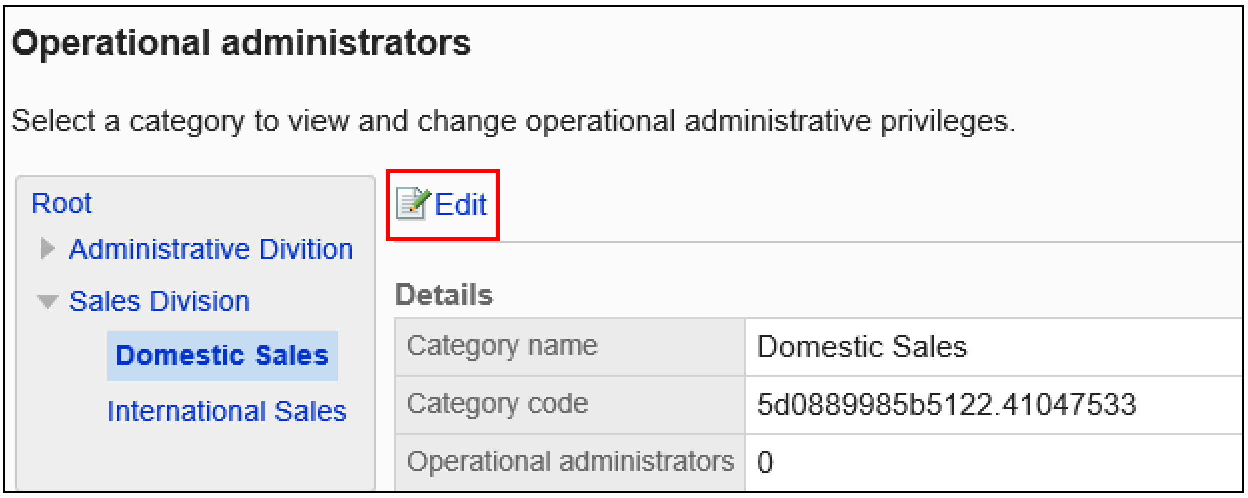
2. Click "System settings".

3. Select "Application settings" tab.

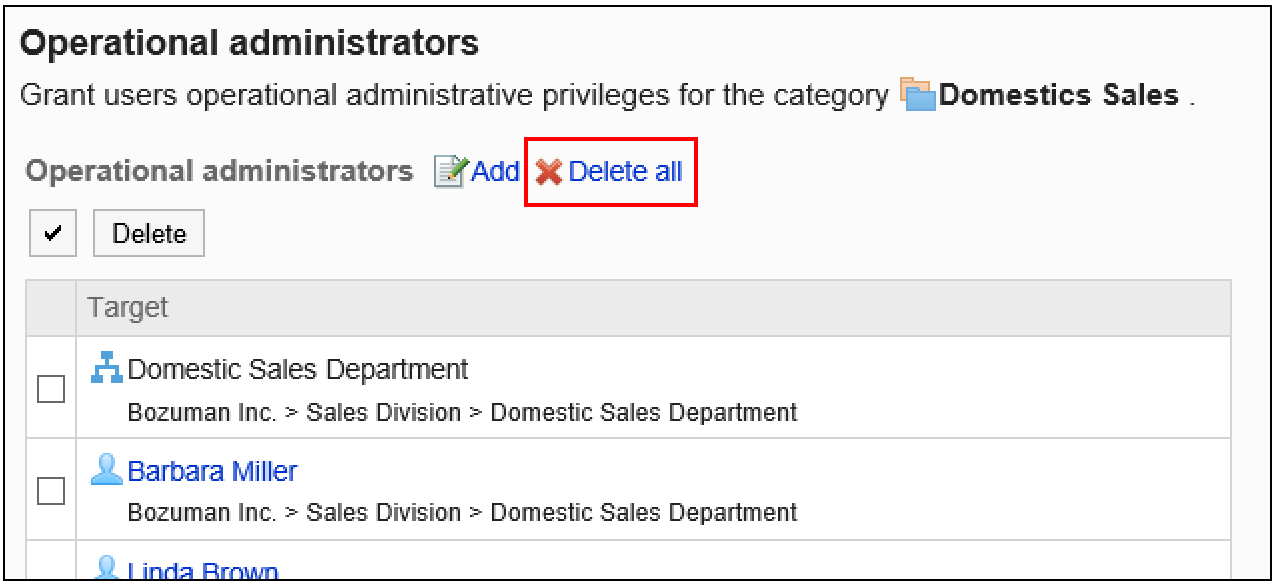
4. Click "Bulletin Board".

5. Click "Operational administrators".

6. On "Operational administrators" screen, select a category and click "Save".



7. **On the screen for "List of operational administrative privilege", click Delete all.**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.6.4. Setting Access Permissions for Categories

For categories, set the following permissions for departments, users, or roles.

- Access permissions
- Write permission
- Post comment permission

Bulletin board permissions vary by the security model applied to the board.

The default settings are as follows:

- Root: The "GRANT (select target)" setting is set for the security model.
  All users are allowed to view topics.
- Sub categories:
  - If you apply the parent category or the parent's subcategory access permissions to the category:
    The security model and permissions of the selected parent category or parent's subcategory are applied.
  - If you do not apply the parent category or the parent's subcategory access permissions to the category:
    The security model is set to "REVOKE (select a limit)".
    All users are allowed to view and write topics and post comments.

For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

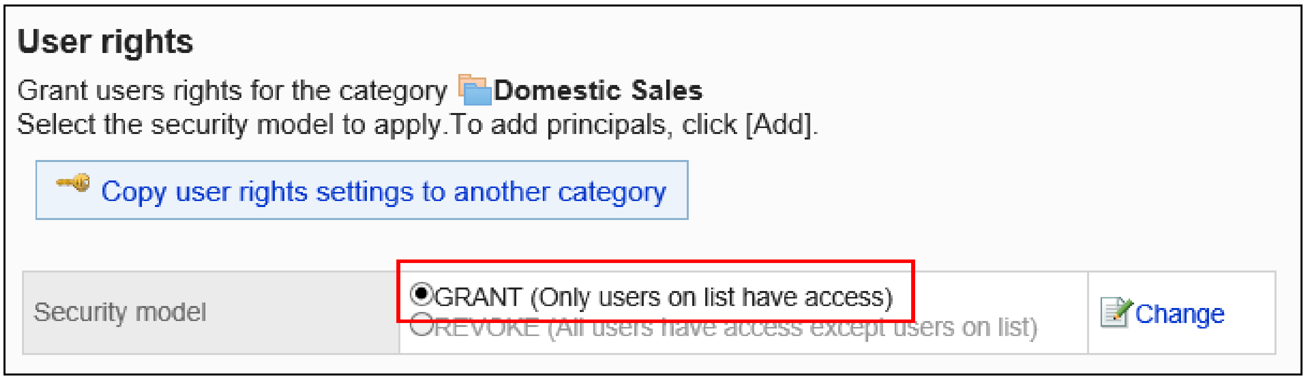
- If you change your security model, configured permissions before changing are initialized.

Steps:

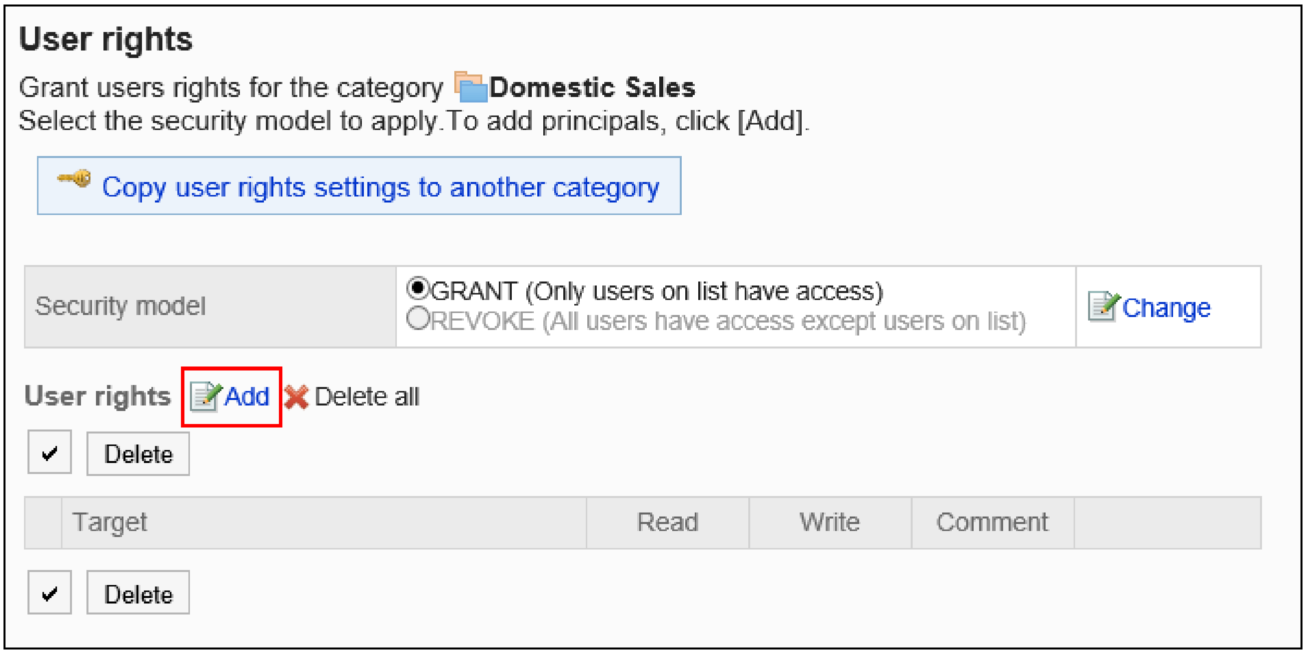
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select a category and click "Edit".**

7. On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".

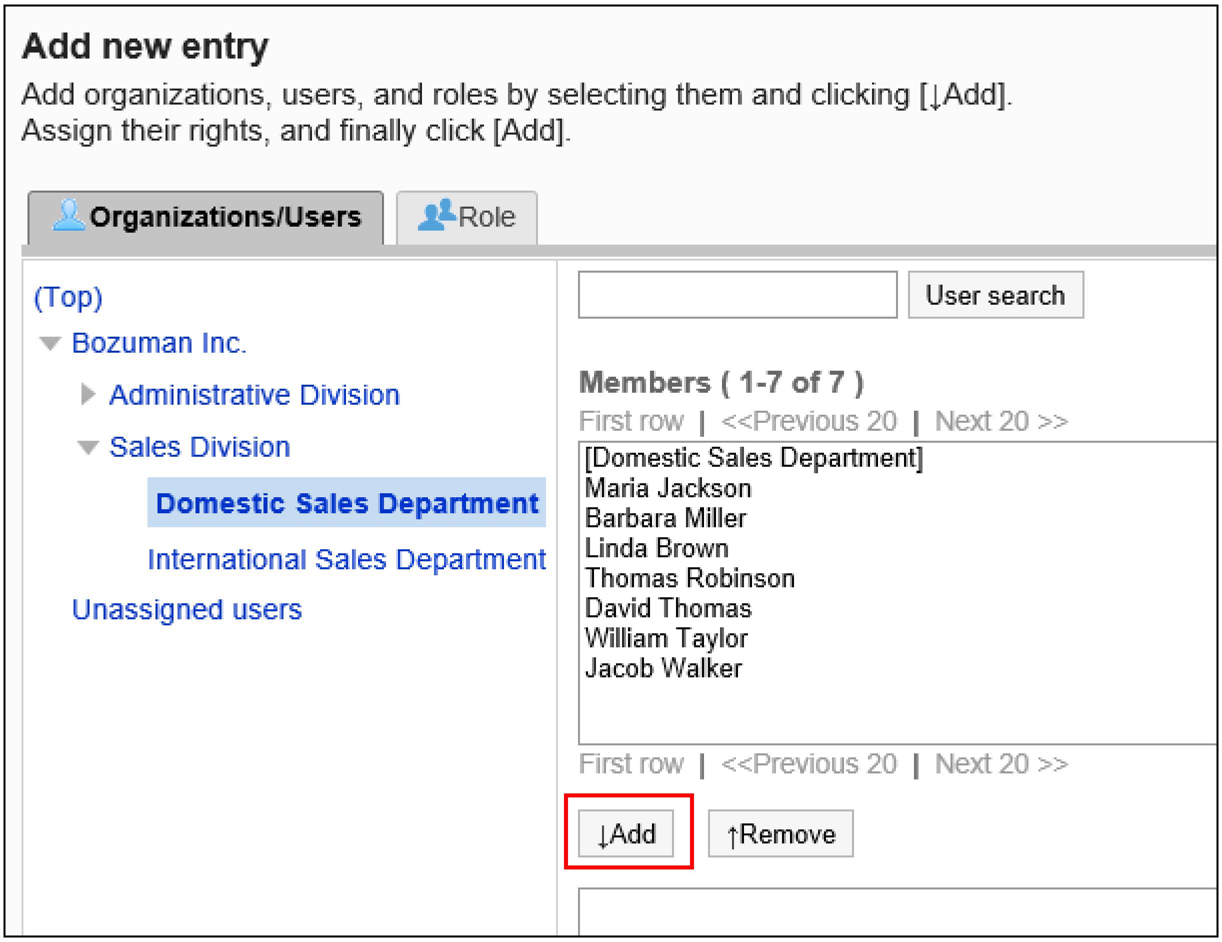
If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).



8. Click "Add".



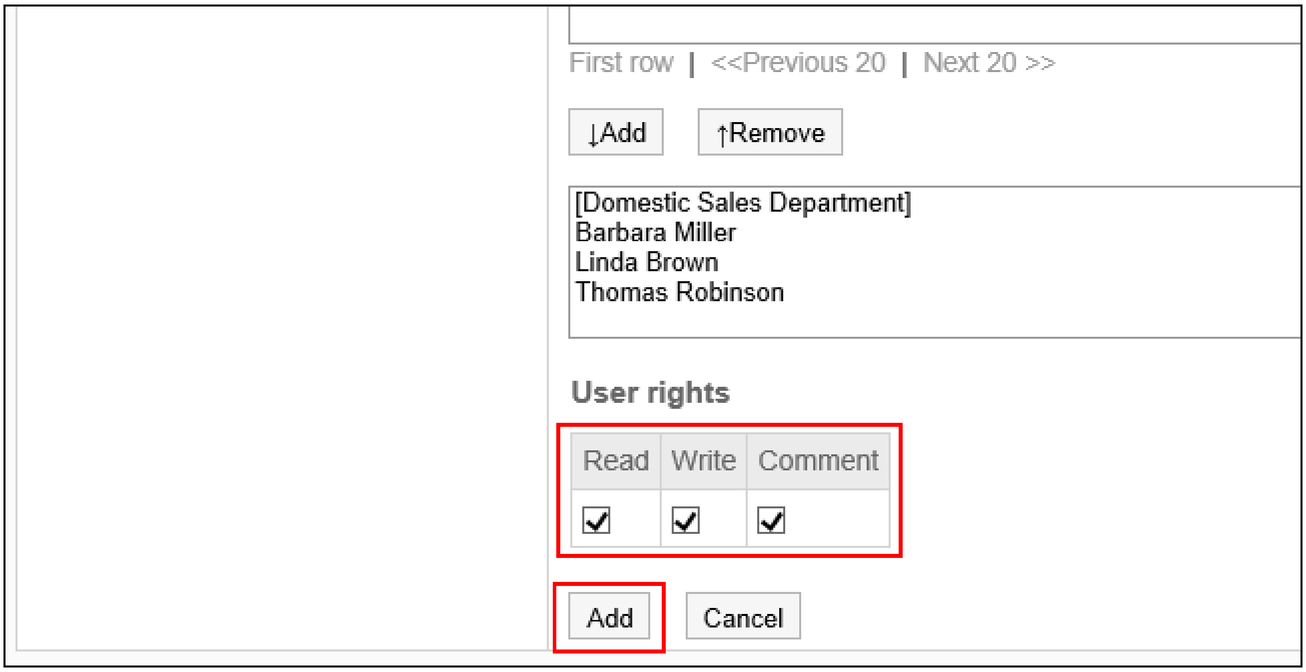
9. On "Add new entry" screen, select the department, user, or role to set permissions, and click "Add".



To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

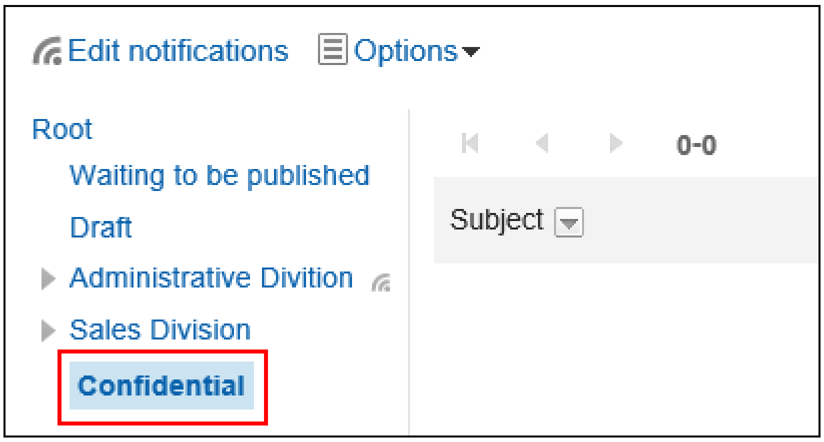
10. Under "User rights", select the check boxes of the permissions to allow, and then click "Add".



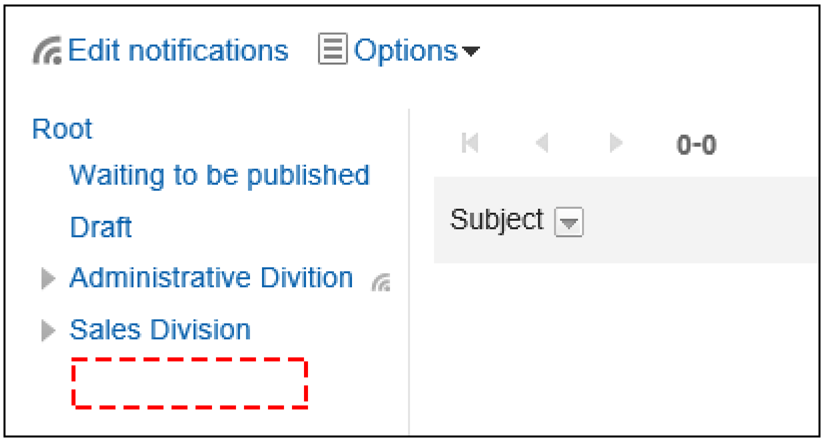
Combination of User Rights

When you control user actions of bulletin boards by user rights, only categories on which the logged in users can now work with are displayed on the bulletin board screen.

Screen showing users who have the user rights:



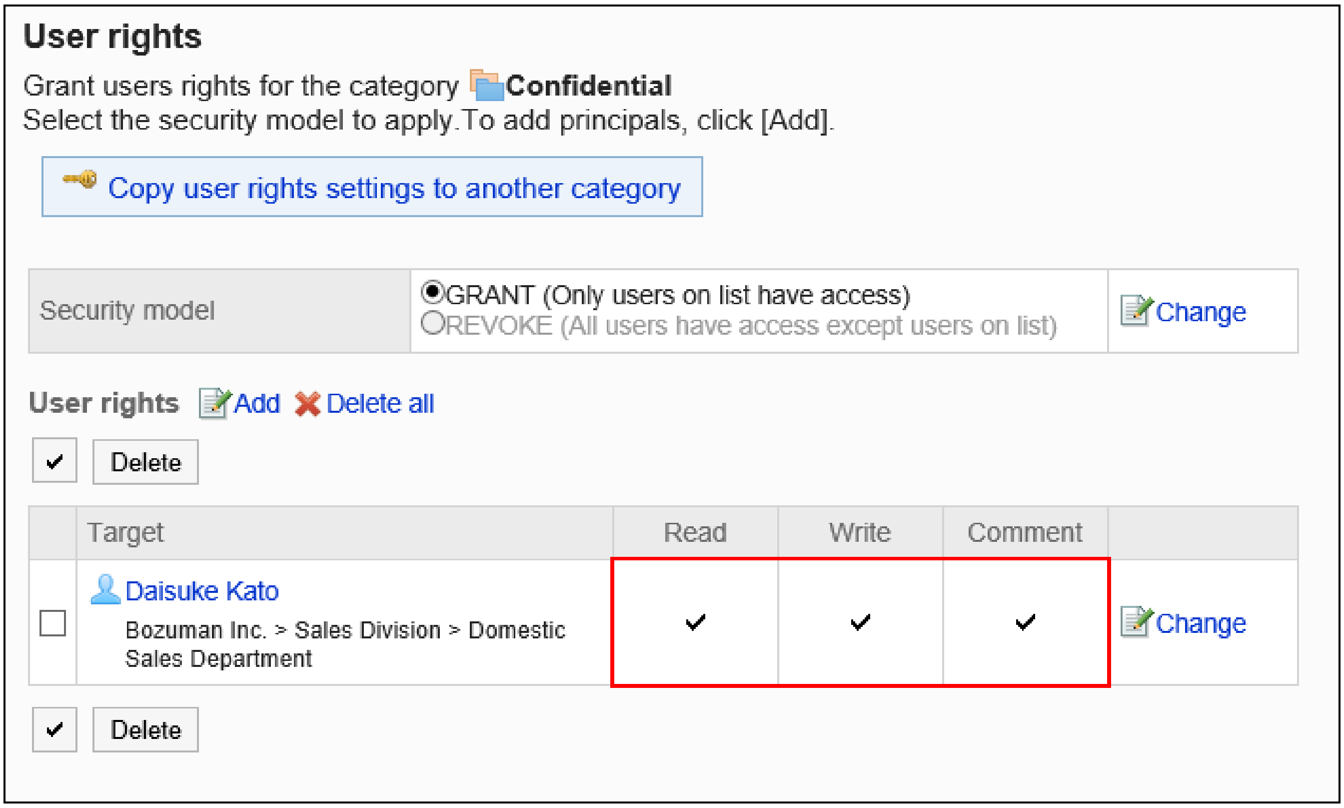
Screen showing users who do not have the user rights:



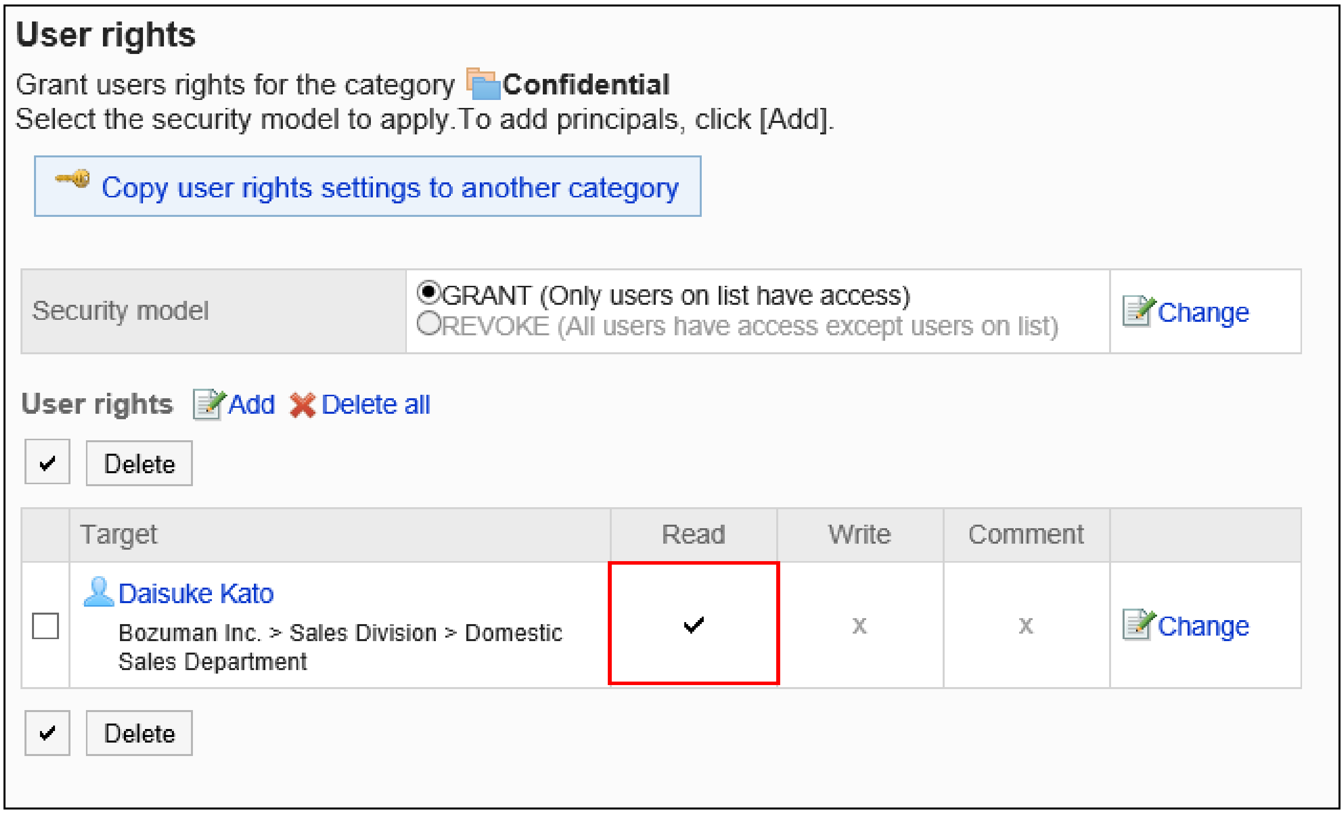
If the security model is "GRANT (Only users on the list have access)"

The example shows that the case in which the access permission security model for the confidential category is "GRANT (Only users on list have access)".

- **Example of allowing Daisuke Kato to perform all the actions on confidential items:**
  Grant Daisuke Kato permissions to view and write topics, and add comments.

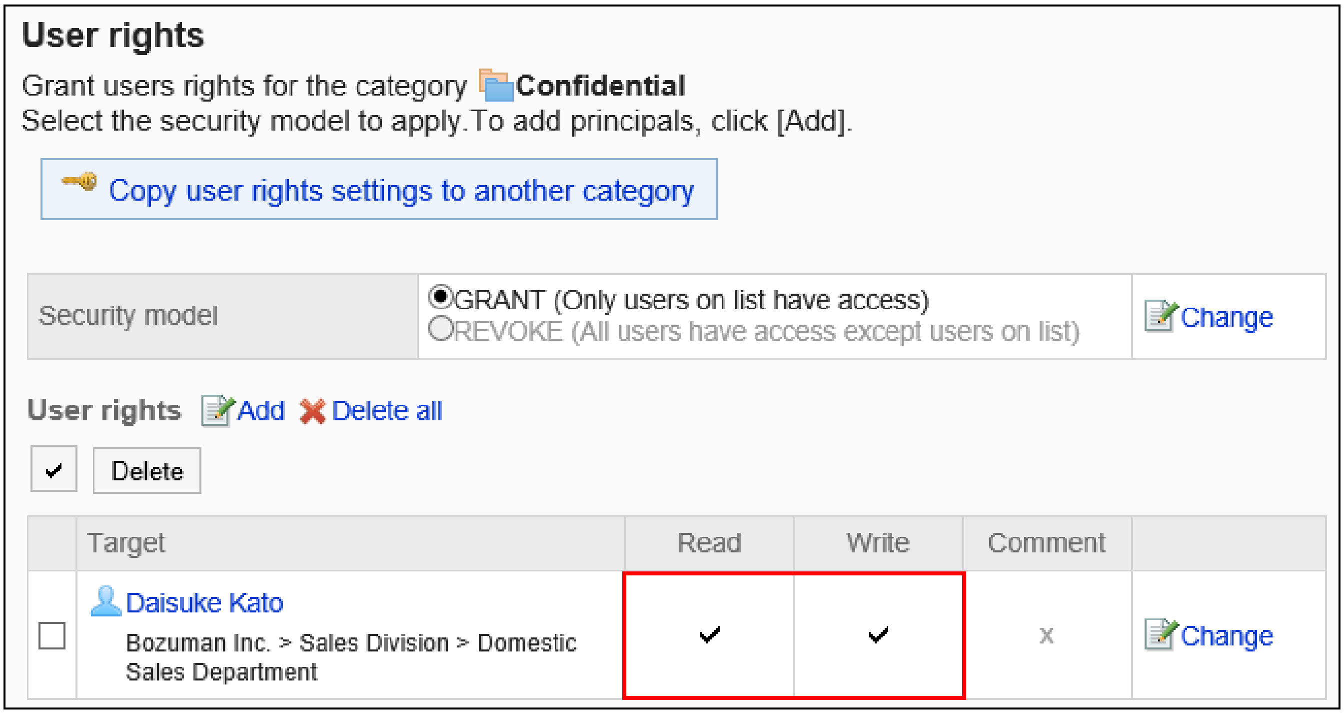


- **Example of Allowing Daisuke Kato to Perform View Book Actions Only on Confidential Items:**
  Grant Daisuke Kato a permission to view items.



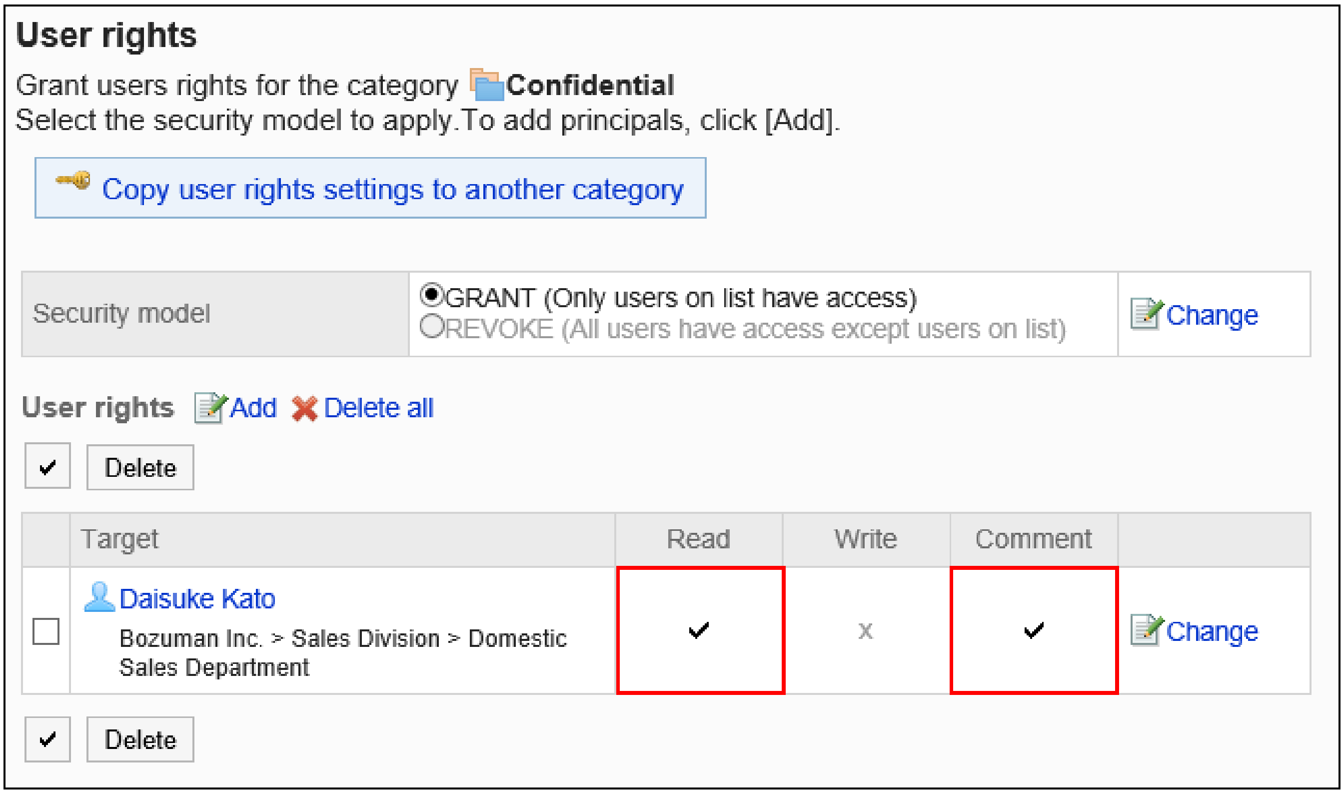
- **Example of allowing Daisuke Kato to perform write topic actions on confidential items:**

  Grant Daisuke Kato permissions to view and write topics.



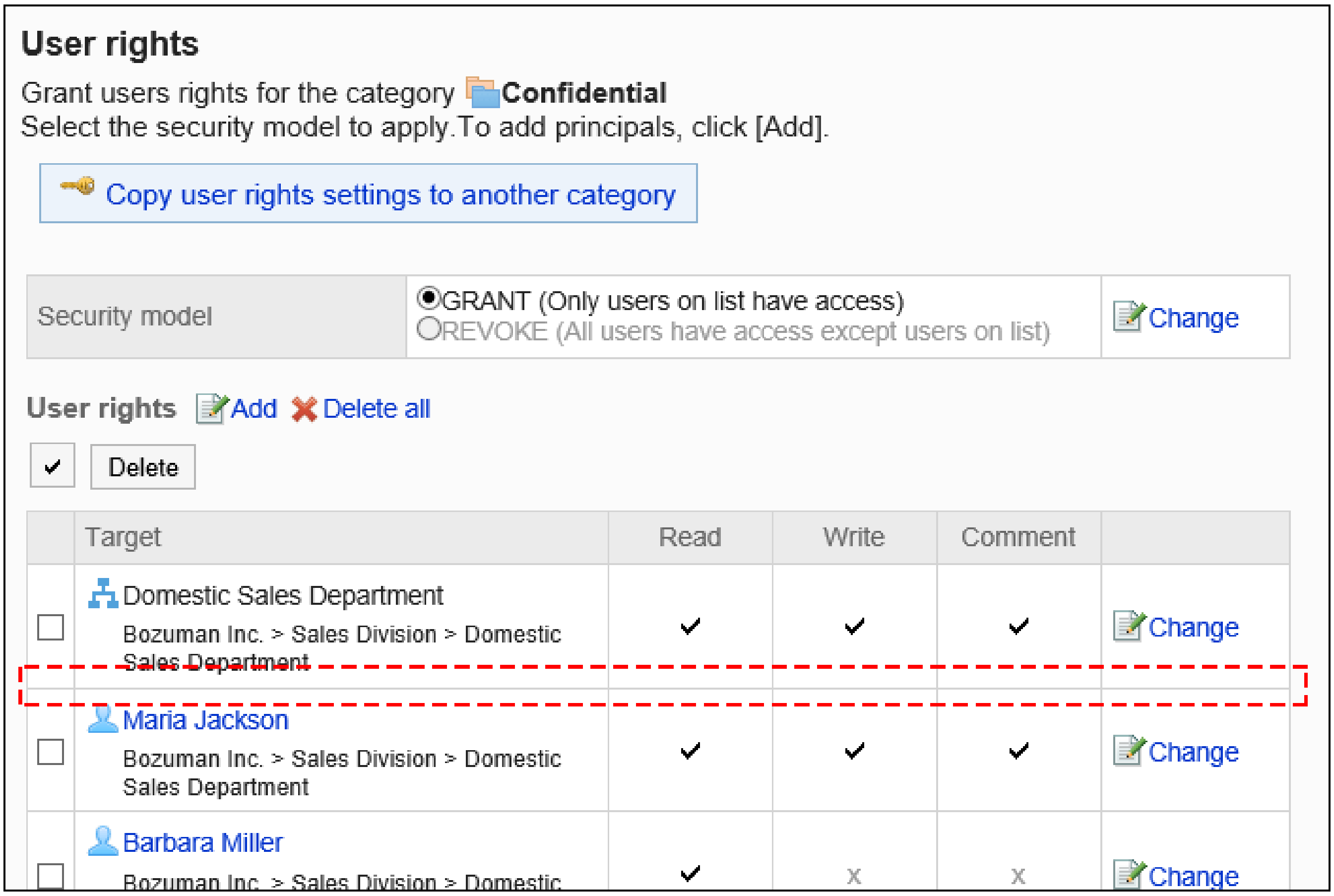
- **Example of allowing Daisuke Kato to perform add comment actions on confidential items:**

  Grant Daisuke Kato permissions to view topics and add comments.



- **Example of prohibiting Daisuke Kato to perform all the actions on confidential items:**

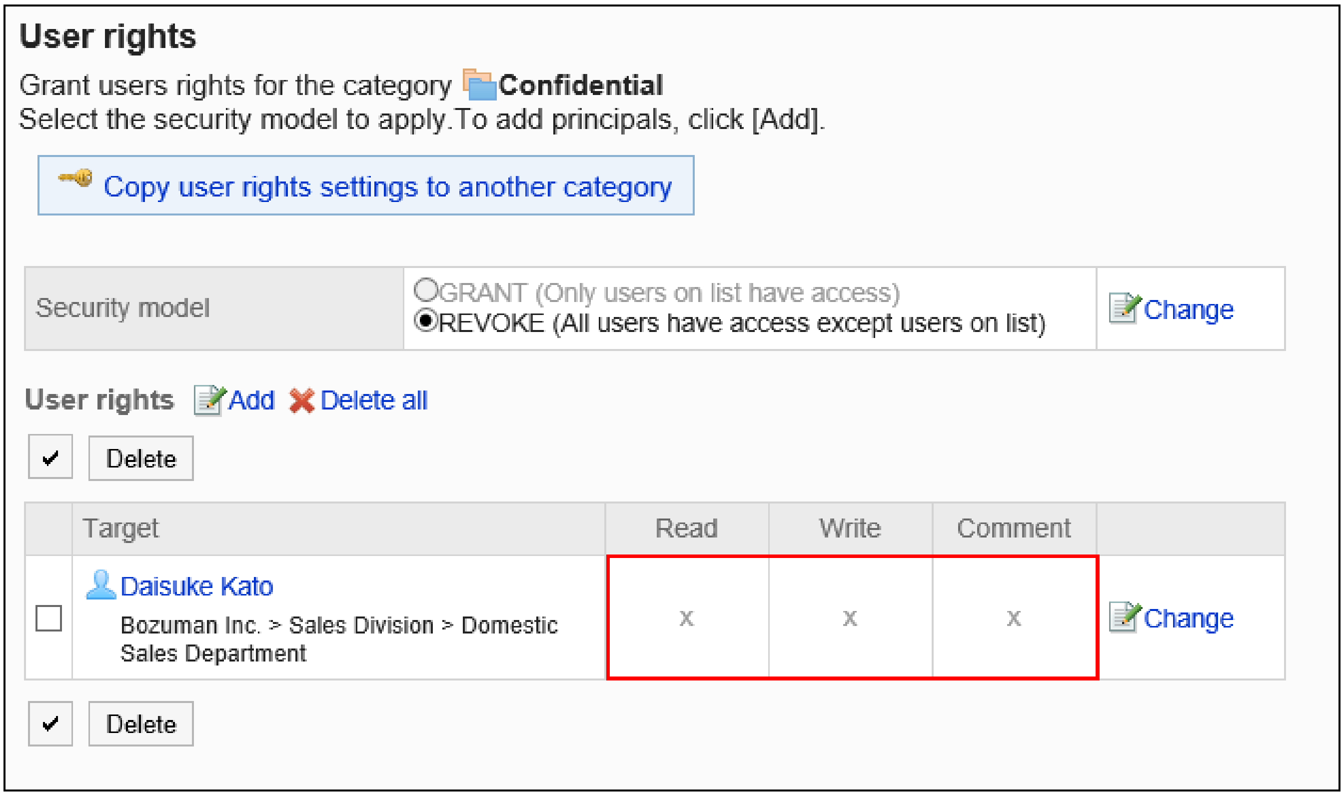
  Delete Daisuke Kato from the user rights list.



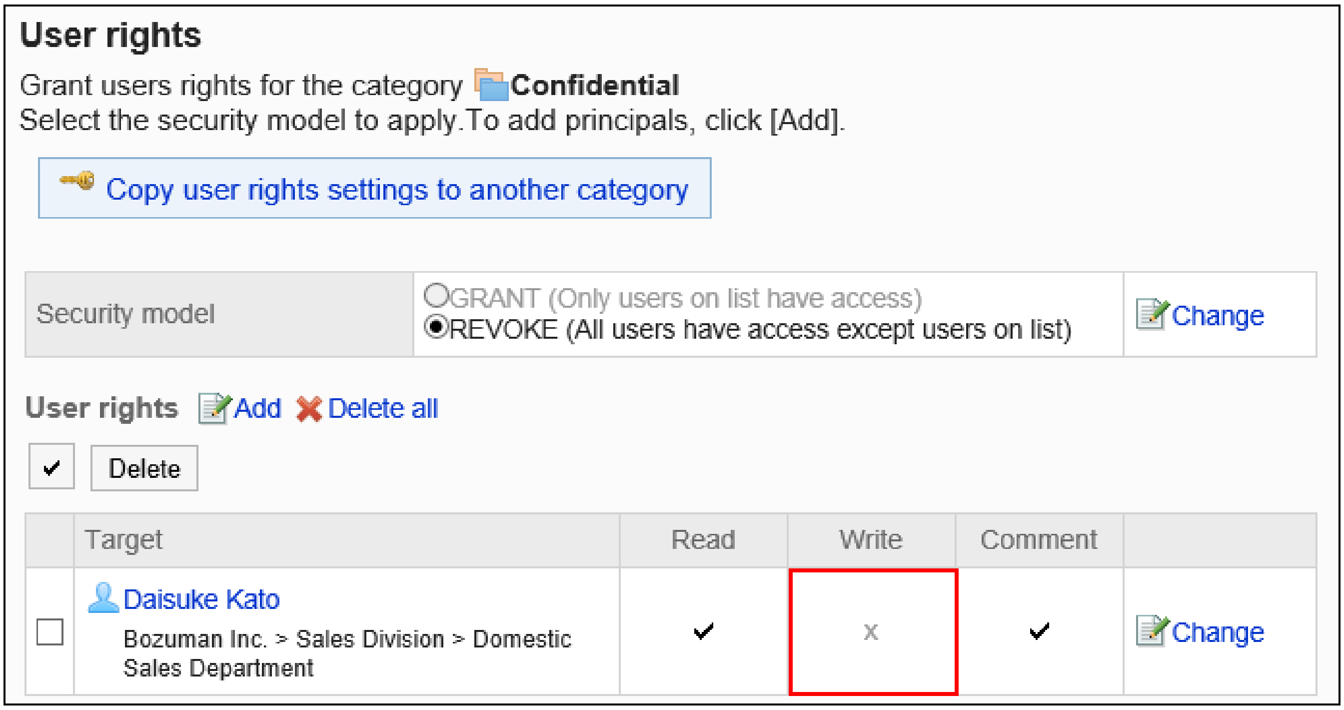
If the security model is "REVOKE (All users have access except users on the list)"

The example shows that the case in which the access permission security model for confidential folders is "REVOKE (All users have access except users on list)".

- **Example of prohibiting Daisuke Kato to perform all the actions on confidential items:**
  Delete permissions to view and write topics, and add comments from Daisuke Kato.

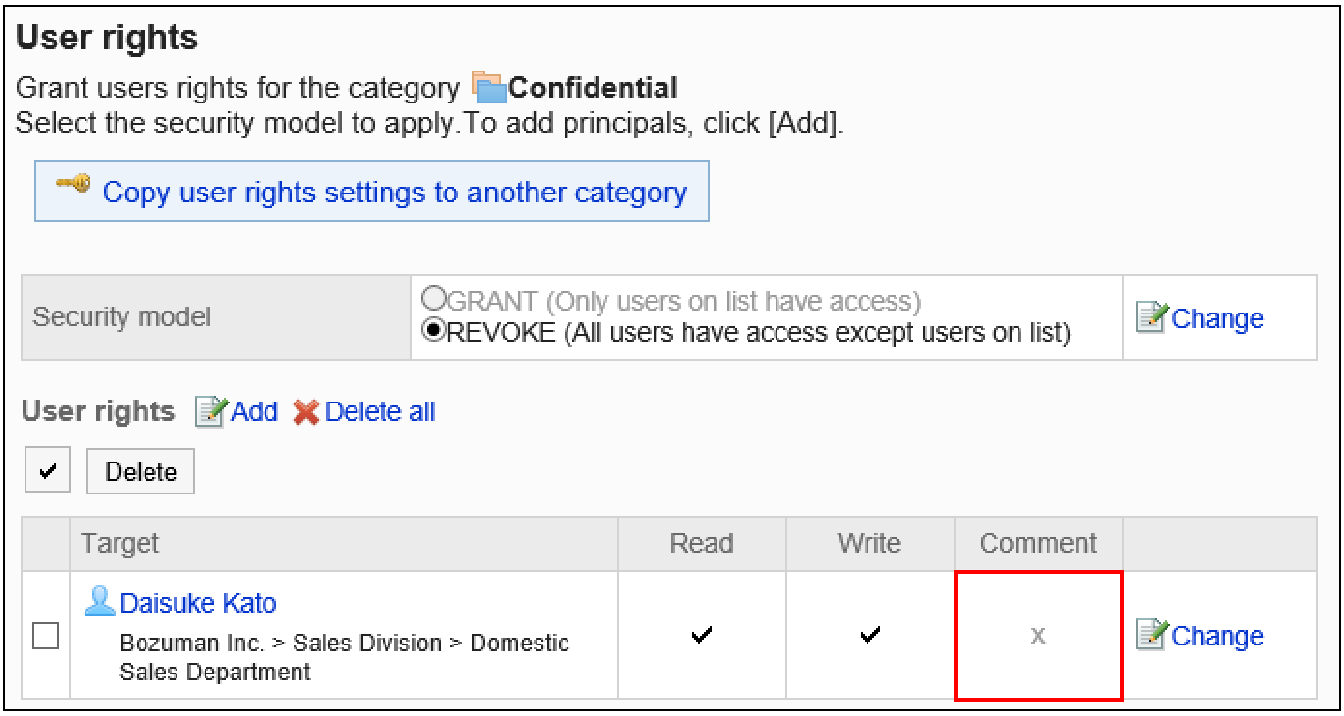


- **Example of prohibiting Daisuke Kato to perform write topic actions on confidential items:**
  Delete a permission to write topics from Daisuke Kato.



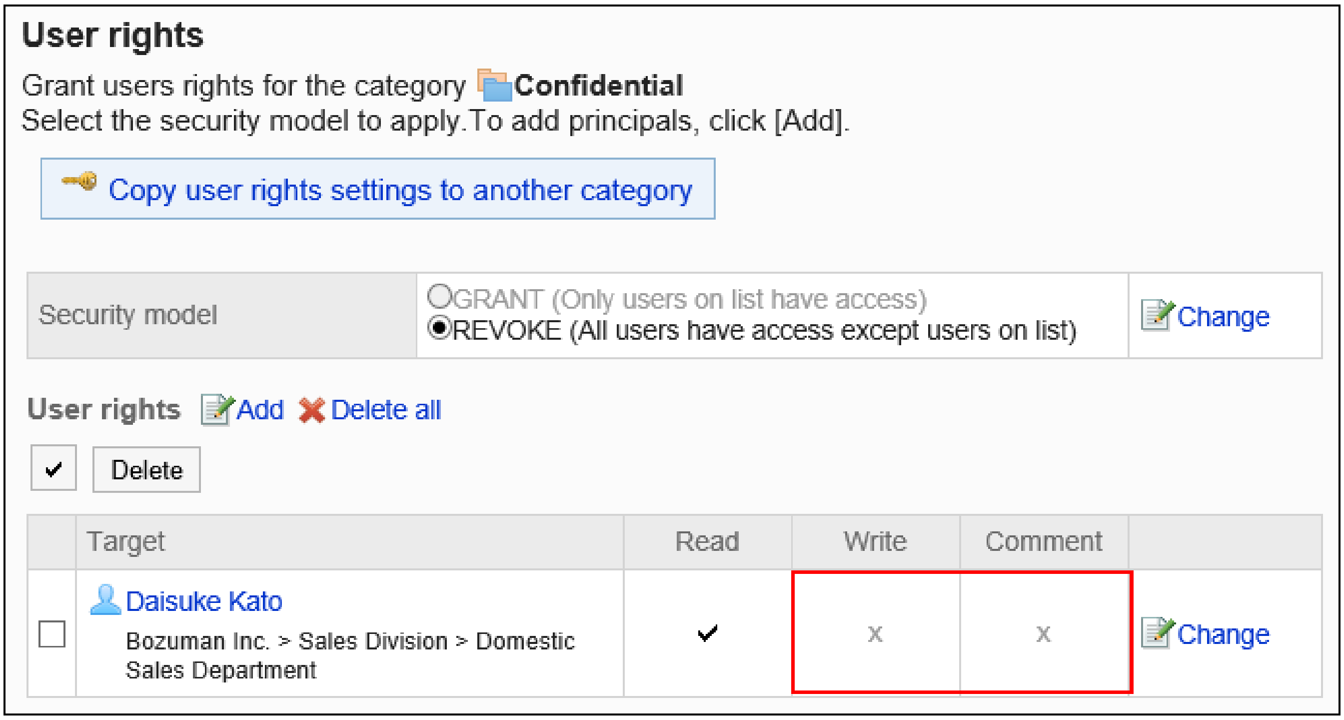
- **Example of prohibiting Daisuke Kato to perform add comment actions on confidential items:**

  Delete a permission to add comments from Daisuke Kato.



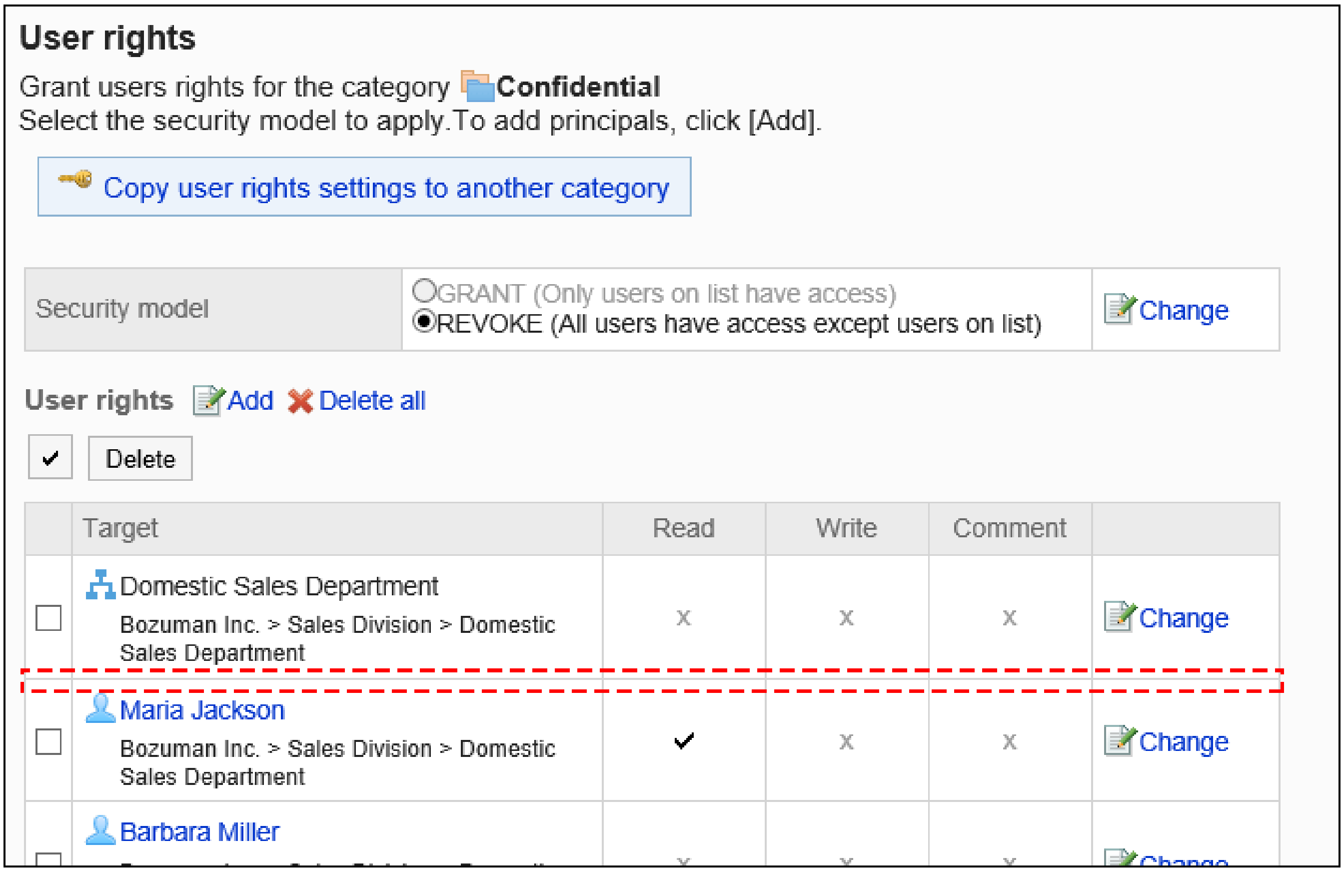
- **Example of prohibiting Daisuke Kato to perform write topic actions and add comment actions on confidential items:**

  Delete permissions to write topics and add comments from Daisuke Kato.



- **Example of allowing Daisuke Kato to perform all the actions on confidential items:**

  Delete Daisuke Kato from the user rights list.



Changing User Rights

Change access permissions granted to users and departments.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

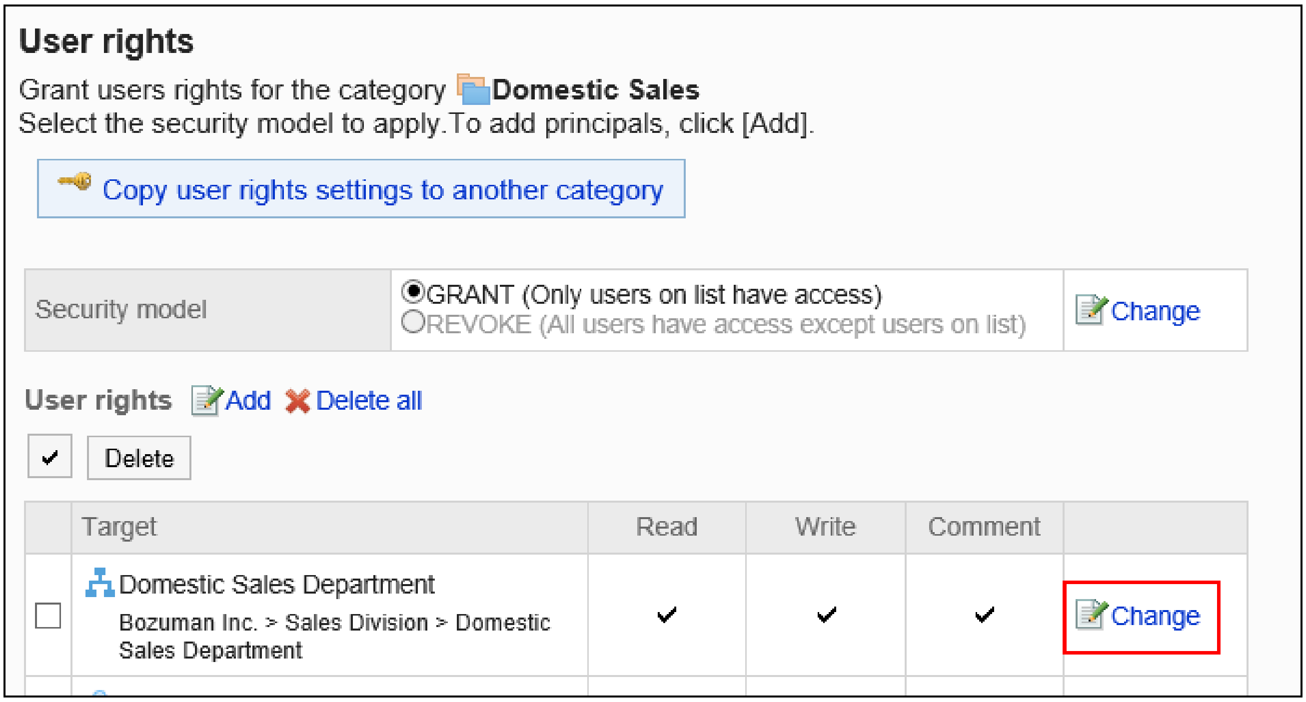
3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a category and click "Edit".**

7. **On "User rights" screen, click "Edit" to change the permission.**



8. **On "Edit user rights" screen, you can change the user rights as needed.**

9. **Confirm your settings and click "Save".**

Deleting User Rights

Delete access permissions granted to users and departments.
If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

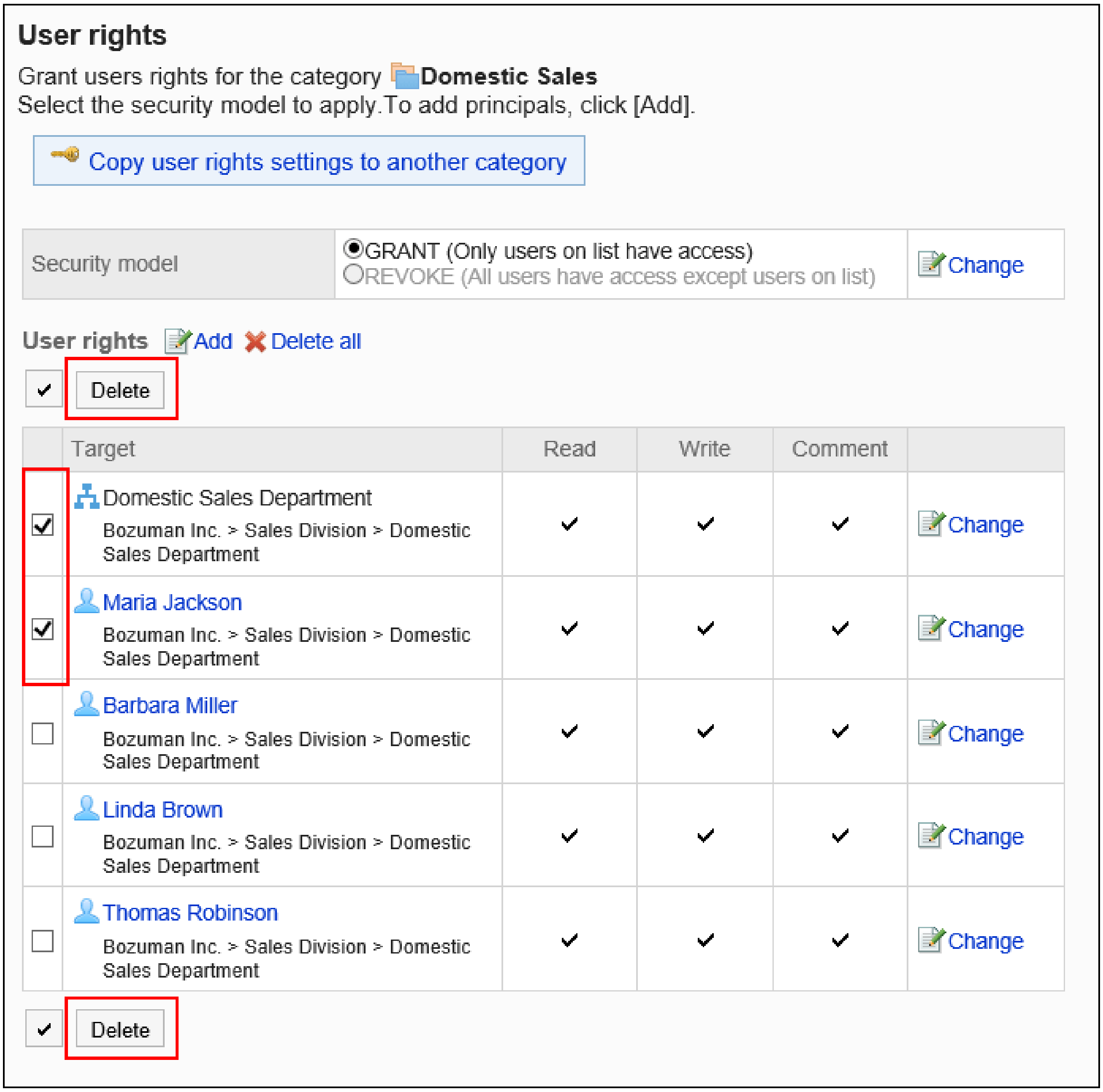
3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a category and click "Edit".**

7. **On "User rights" screen, select the check boxes of the permissions to delete, and then click "Delete".**



8. Click "Yes" on "Delete user rights" screen.

Deleting All User Rights

Delete all user rights.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

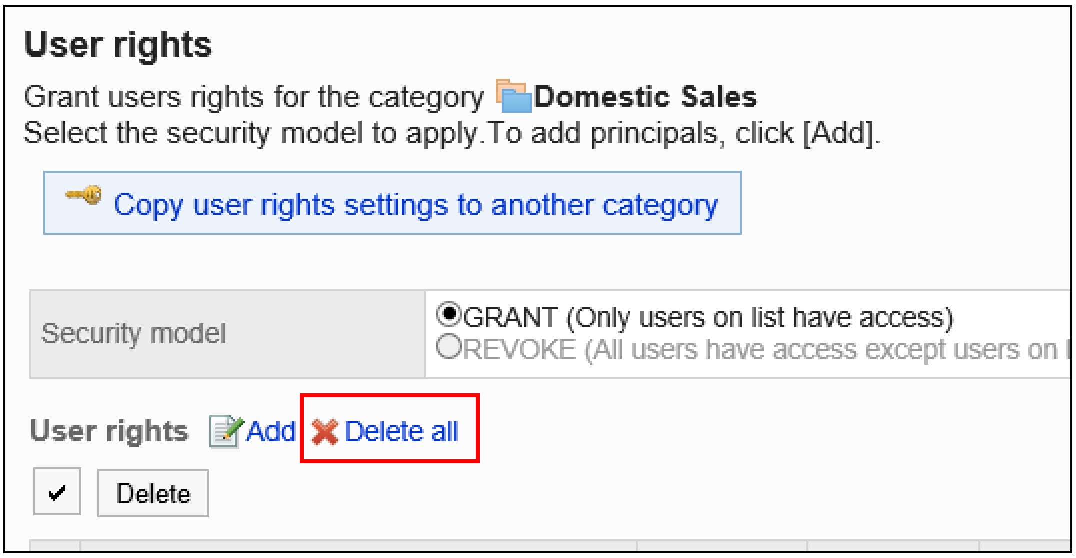
3. Select "Application settings" tab.

4. Click "Bulletin Board".

5. Click "Edit user rights".

6. On the "Edit user rights" screen, select a category and click "Edit".

7. On "User rights" screen, click "Delete all".



8. **Click "Yes" on "Delete all user rights" screen.**

Applying User Rights to Other Categories

Copy the user rights of a category and apply them to other categories.

The user rights settings in the destination categories are overwritten by the source category settings.

The user rights settings for other categories cannot be applied to the root.

If you change the settings in the source category after applying the user rights settings to other categories, the change will not be applied to the destination categories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

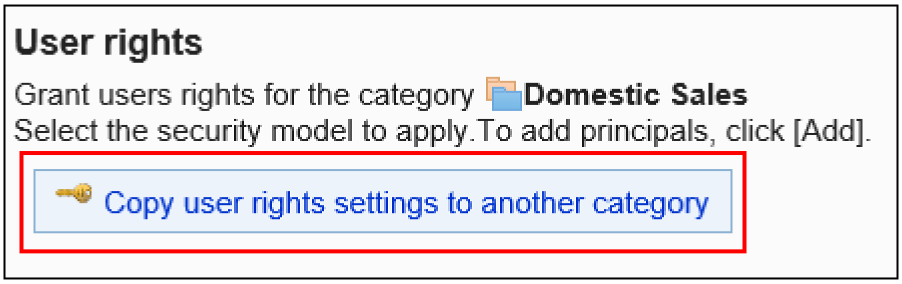
3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select the category from where to copy the user rights, and then click "Edit".**

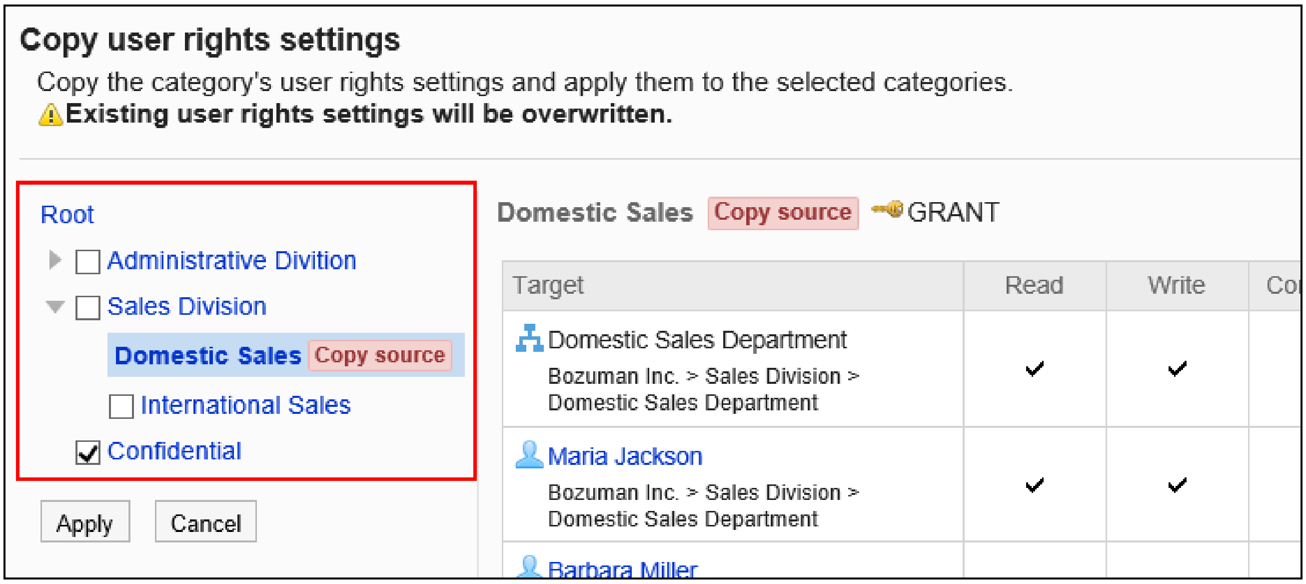
7. **On "User rights" screen, click the item to apply permissions to other categories.**



8. **On the screen to apply user rights in bulk, select the check box for categories to apply user rights.**

On the right side of the screen, a list of user rights settings to be copied are displayed.

By clicking "Root", you can deselect all categories.



9. Confirm your settings and click "Apply".

2.6.5. Setting Notifications

This section describes category notifications.

Differences between Update Notifications and Forced Notifications

The two types of notifications which an administrator can set on Bulletin Board are update notifications and forced notifications. Set either for each category.
When a topic is created or updated within the categories for which update notifications or forced notifications are set, notifications will be sent to the specified recipients.
Since notifications received by users are displayed on the Notifications portlet, this prevents users from overlooking topics.

The difference between update notifications and forced notifications is as follows:

	Update notifications	**Forced notifications**
Overview of functions	Notifications are sent to the specified recipients when a topic is created or updated. Users can stop receiving update notifications set by the administrator if notifications are not needed. Users can also set update notifications themselves.	Notifications are sent to the specified recipients when a topic is created or updated. Users cannot stop receiving forced notifications set by the administrator.
When the administrator operates	Notifications can be set or stopped by category. Operation by topic is not available.	Notifications can be set or stopped by category. Operation by topic is not available.
When the user operates	Notifications can be set or stopped by category. In categories where update notifications are set, notifications can be switched ON and OFF by topic.	Cannot perform the requested action.

Note

- Notifications are not sent to unauthorized users if the notification recipients do not have permission to view the category.
- If "Notify this update" check box is cleared when the topic editor updates the body of the topic, notifications will not be sent.

Setting Update Notifications for Categories

This section describes how to set update notifications for categories.

Adding Notification Recipients

Set update notifications for the selected category.

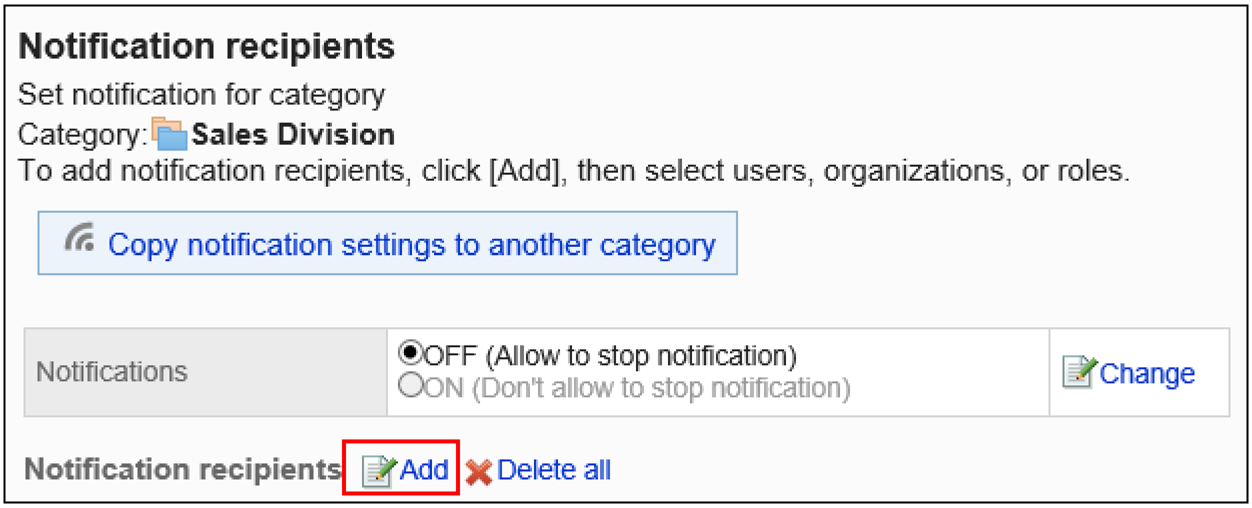
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Notification settings".**
6. **On the notification settings screen, select a category and click "Edit".**

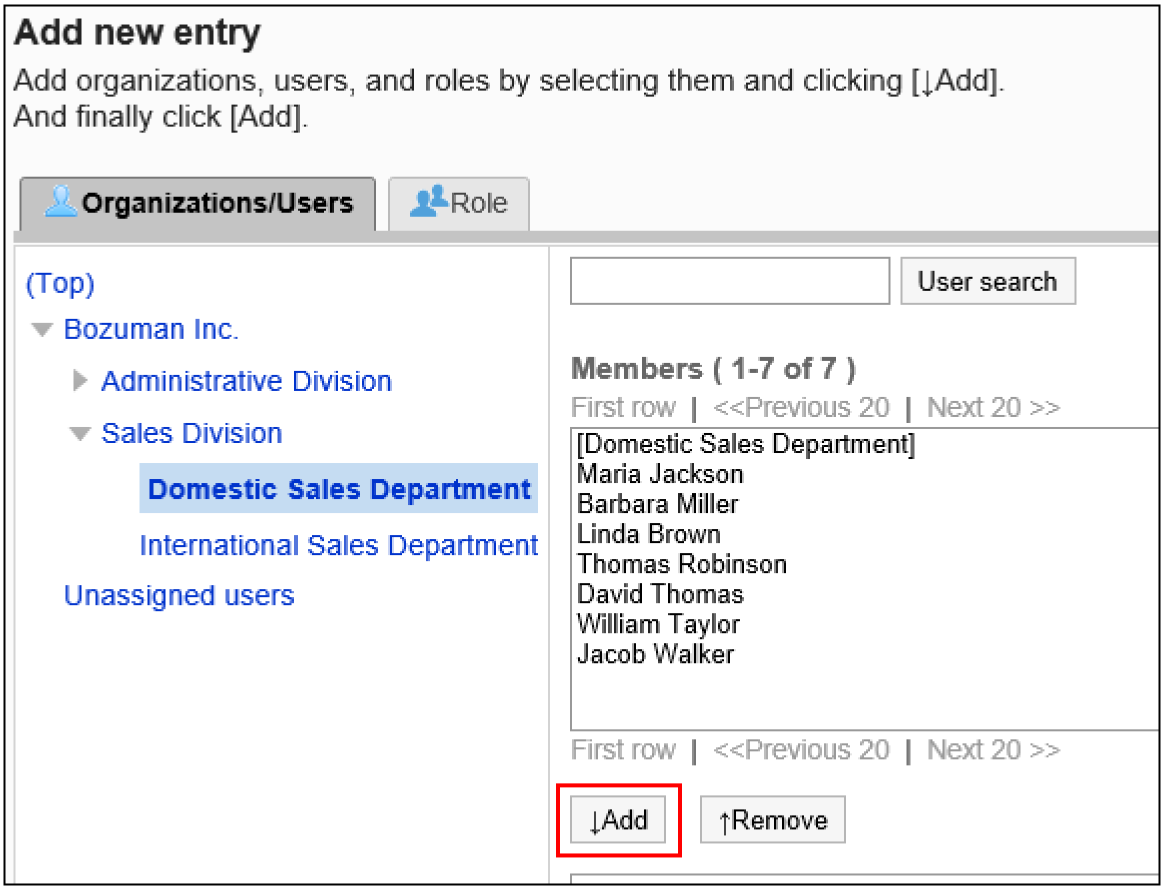
7. **On the screen for notification recipients, check that the forced notification is OFF (allow to stop update notifications).**

If the forced notification is ON (do not allow to stop update notifications), click "Change" and change it to OFF (allow to stop update notifications).

8. **Click "Add".**



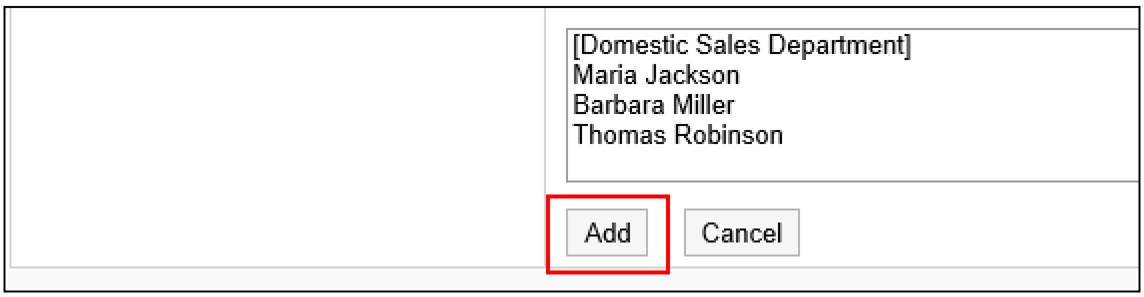
9. **On the screen to add recipients, select the department, user, or role to set notifications, and then click "Add".**



To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

10. **Click "Add".**



Deleting Notification Recipients

Delete notification recipients that are set for the category.

If you have applied notification settings of selected categories to other categories, deleting the recipients does not affect the target categories.

Caution

- Once you delete notification recipients, they cannot be restored.

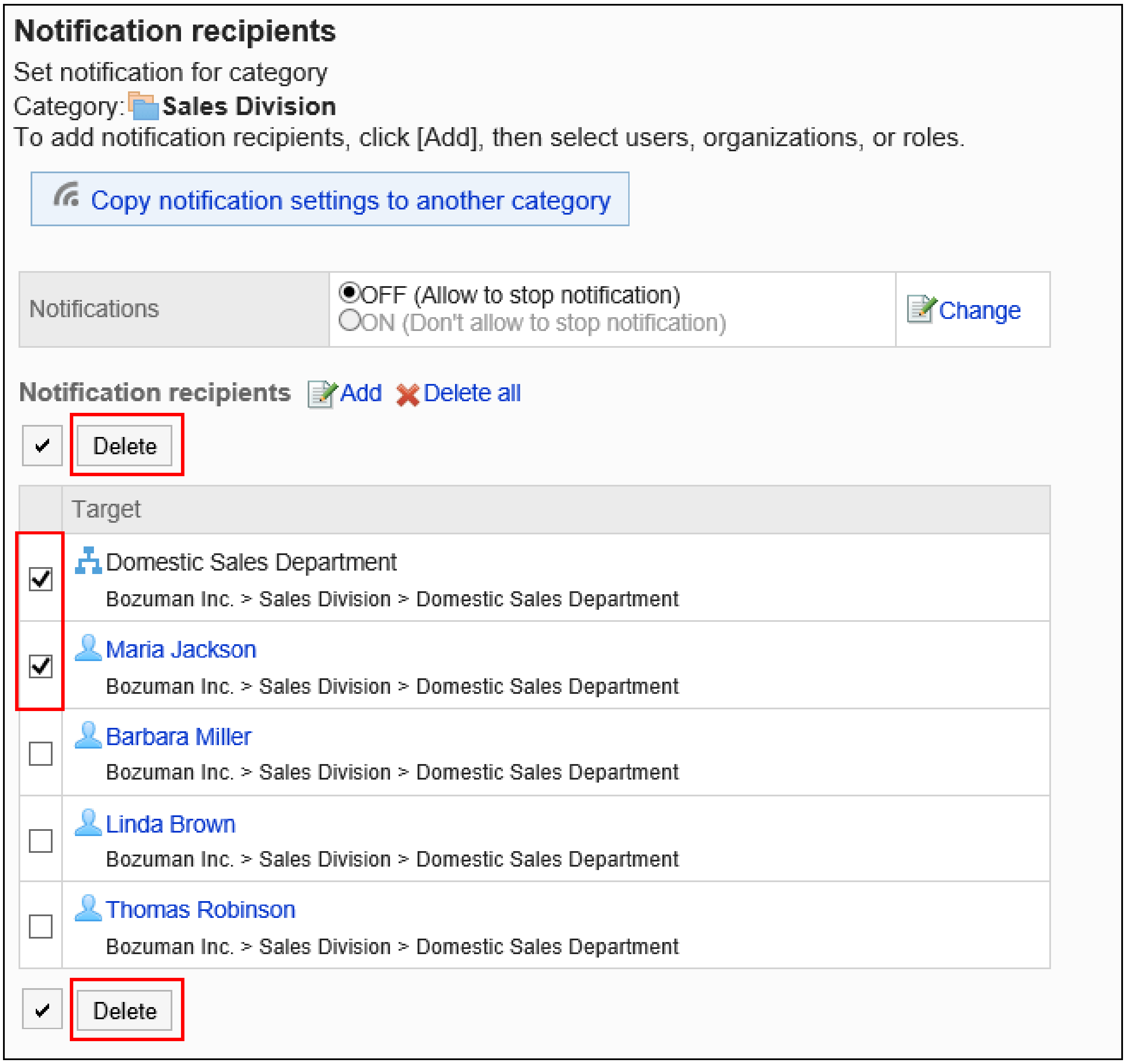
Selecting and Deleting Notification Recipients

Select notification recipients and delete them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Notification settings".**
6. **On the notification settings screen, select a category and click "Edit".**

7. **On the screen for notification recipients, select the check boxes of the recipients to delete, and then click "Delete".**



8. Click "Yes" on the screen to delete all recipients.

Delete All Notification Recipients

Delete all notification recipients in the category.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

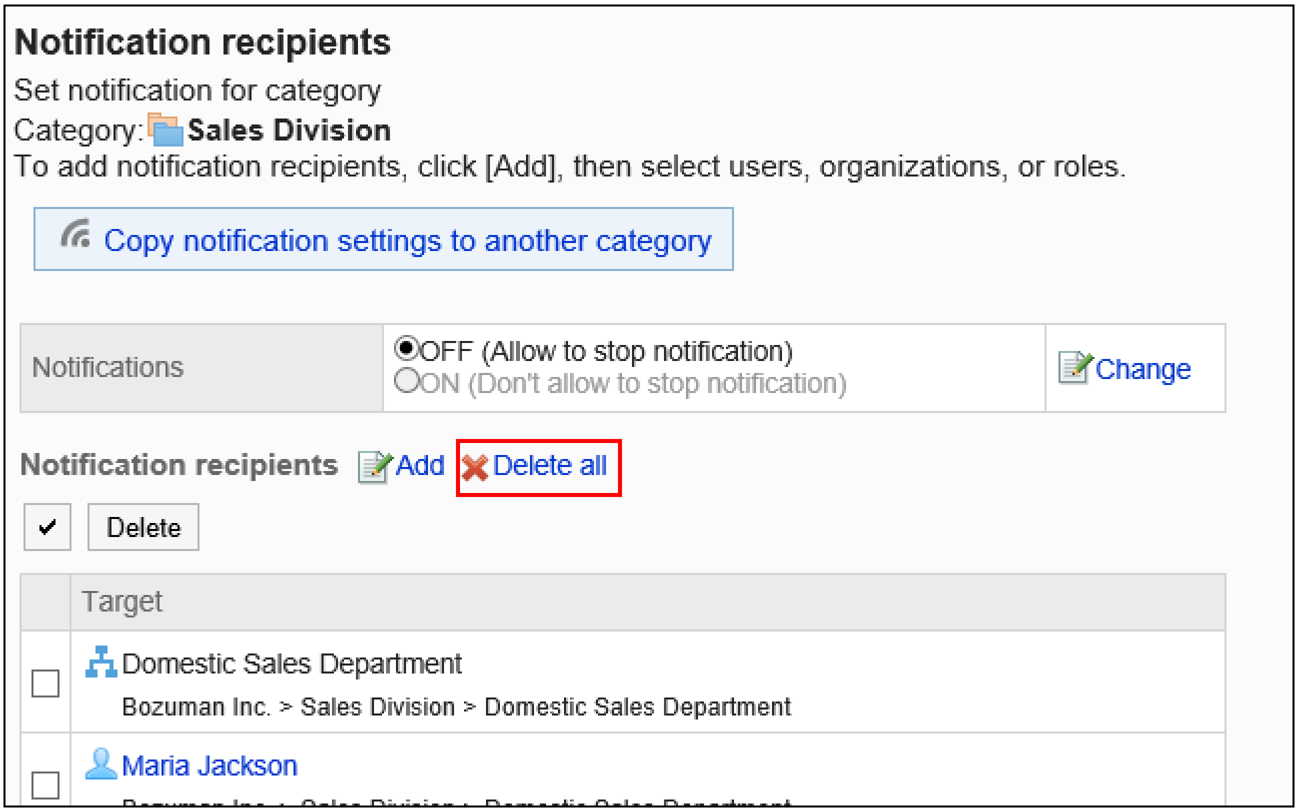
3. Select "Application settings" tab.

4. Click "Bulletin Board".

5. **Click "Notification settings".**

6. **On the "Notification settings" screen, select a category and click "Edit".**

7. **On the "Notification recipients" screen, click "Delete all".**



8. **Click "Yes" on the screen to delete all notification recipients.**

Setting Forced Notifications for Categories

This section describes how to set the category forced notifications.

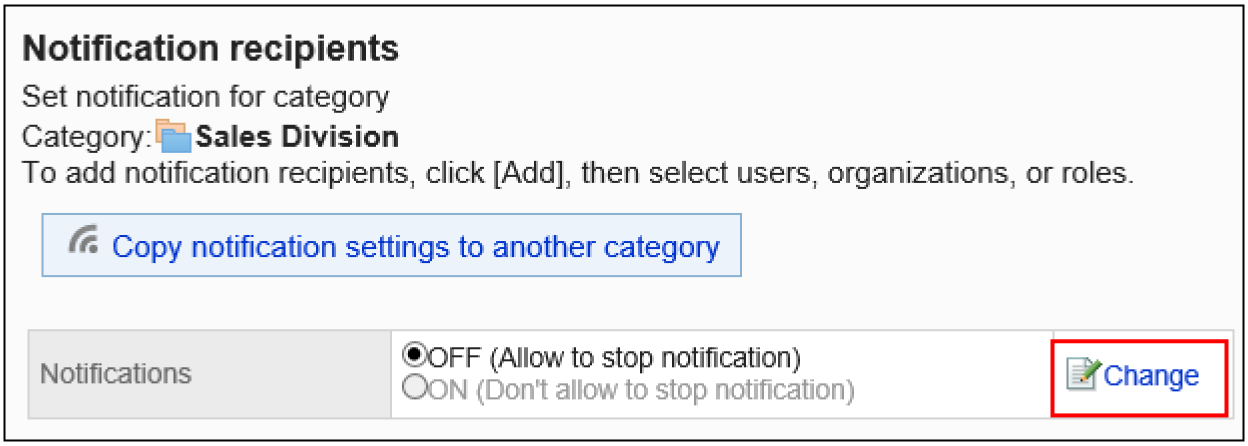
If you set forced notifications for categories to ON, users cannot stop receiving notifications for that category.

It is useful to set the forced notifications to the categories containing topics that the target users must see.
By default, the forced notification is set to OFF (allow to stop update notifications).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click "Notification settings".**
6. **On the notification settings screen, select a category and click "Edit".**

7. **On the screen for notification recipients, click "Change" for forced notifications.**



8. **On the screen to change forced notifications, select ON (do not allow to stop update notifications), and then click Save.**

If you stop forced notifications, select OFF (allow to stop update notifications).

If you deactivate the forced notifications, they are handled as update notifications.

To stop update notifications, you must delete the targets of the update notifications.

For details, refer to Deleting Notification Recipients(987Page).

2.6.6. Managing Topics

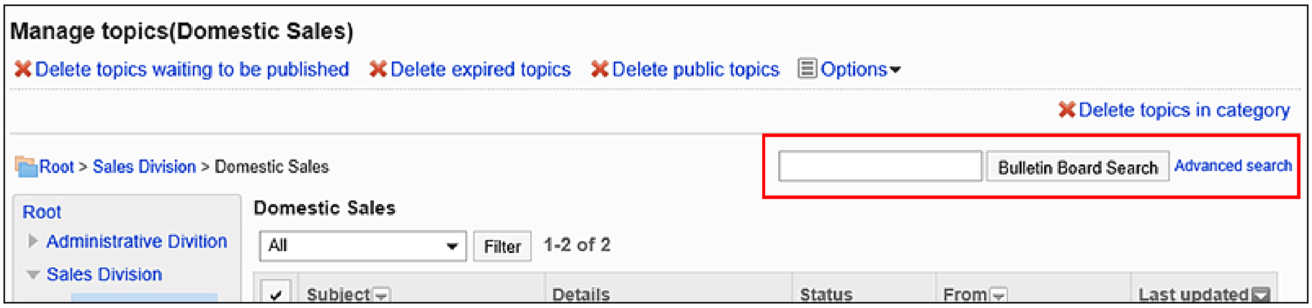
This section describes tasks to manage topics on system administration pages.

Note

- You can check the following information on the topic by clicking **Options** on the screen to manage topics or topic details.
  - Check access permissions
  - Notification recipients
  - Users allowed to edit or delete topics:
    This is displayed on the topic details screen.

For details, see How to View the Screen.

- You can also search topics by entering keywords in the topics on the screen to manage topics.



For details, see Searching Topics.

Changing Topics

On the topic details screen, you can change the contents of topics.

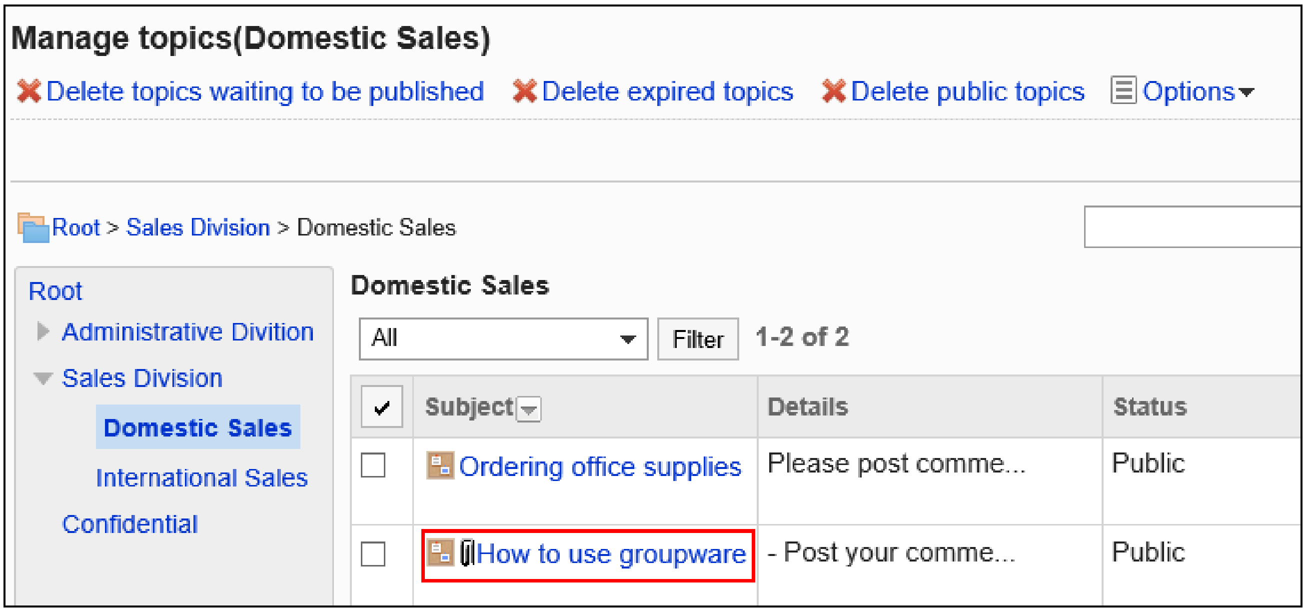
You can delete attachments and comments on the topic details screen.

Steps:

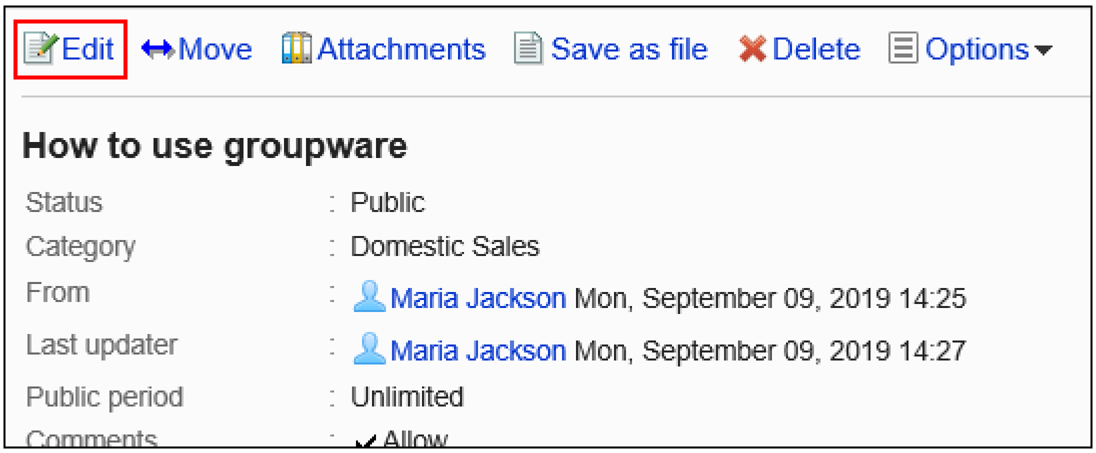
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click the item to manage topics.**
6. **On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".**

   The statuses of the topics in the drop-down list are as follows:
   - All
   - Topics waiting to be published
   - Public
   - Expired

7. **Click the topic title to change.**

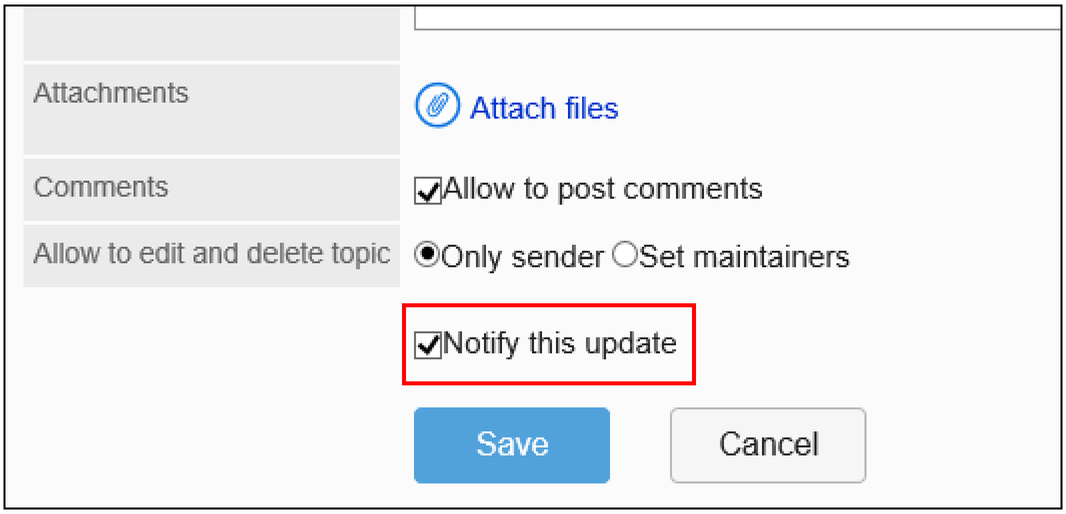


8. **On the screen of topic details, click "Edit".**



9. **On the screen for changing topics, you can change the settings as necessary.**

To send notifications on the topic update, select the "Notify this update" check box.



10. Confirm your settings and click "Save".

Moving Topics

Move selected topics to other categories.

When the topic details screen is displayed for the first time after moving, the body of the topic is displayed in a background color (yellow) that indicates unread.

Moving Topics One by One

Move topics to another category one by one.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Bulletin Board".

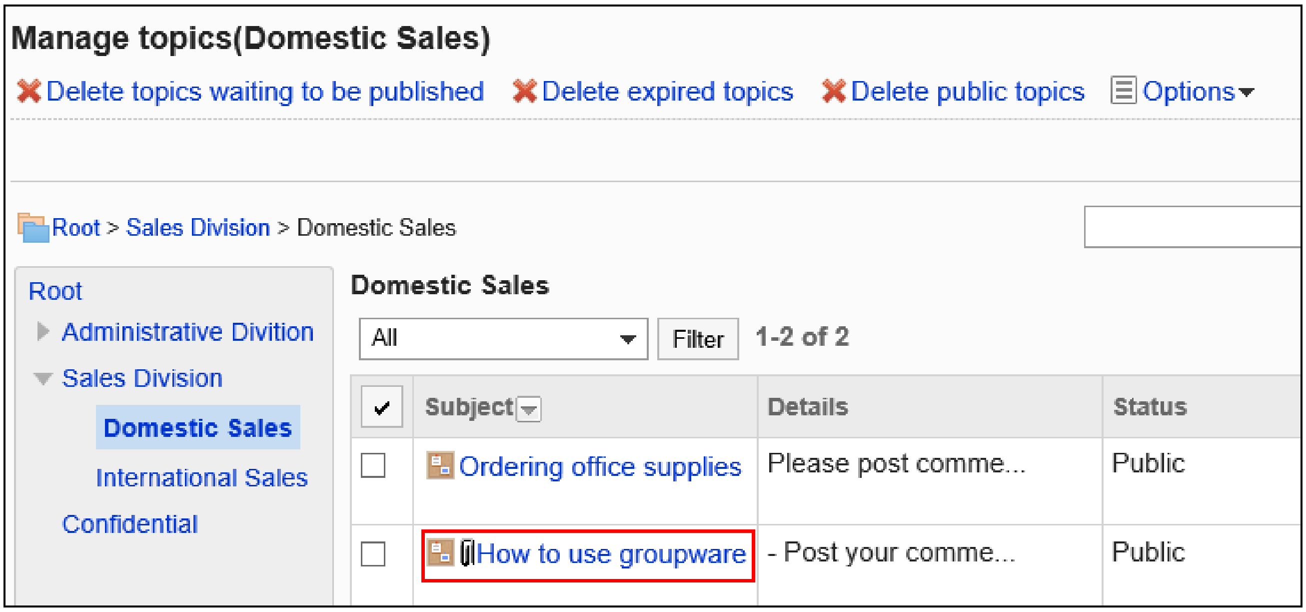
5. Click the item to manage topics.

6. On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".

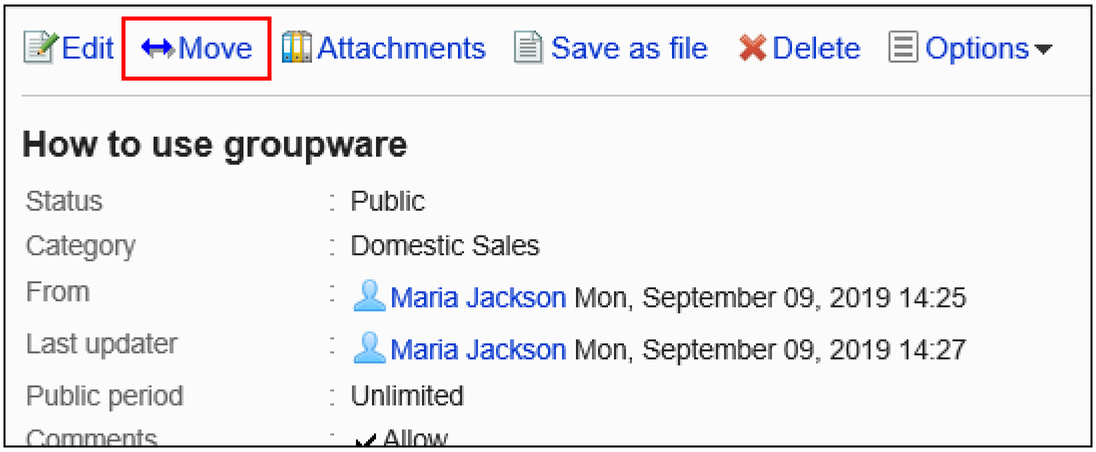
The statuses of the topics in the drop-down list are as follows:

- All
- Topics waiting to be published
- Public
- Expired

7. **Click the topic title to move.**



8. **Click "Move" on the topic details screen.**

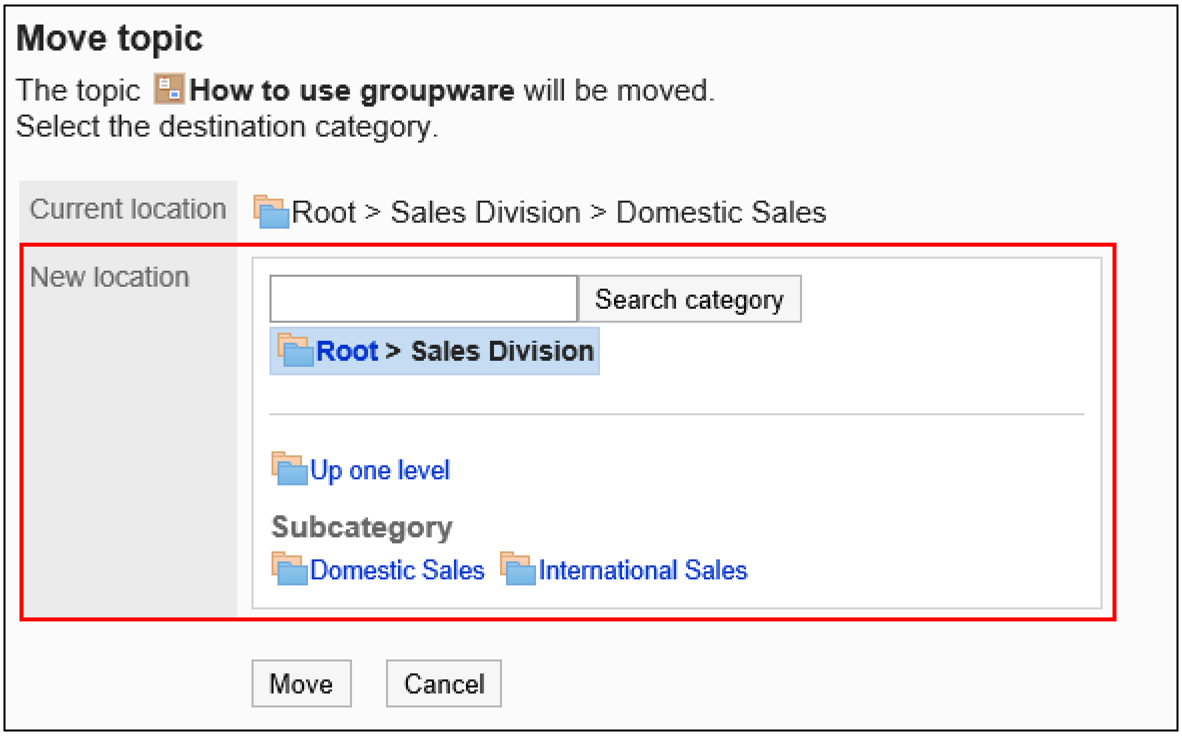


9. In the field to specify the category to move into on the screen to move topics, select a category.

You can search for categories to move categories into by entering keywords and clicking "Category search".

Clicking "Move up" moves the category up one level.

Clicking on a category name moves you to the subcategory of the category you clicked. Numbers represent the number of subcategories.



10. Confirm your settings and click "Move".

Moving Multiple Topics in Bulk

Move multiple topics to other categories.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click the item to manage topics.**

6. **On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".**

The statuses of the topics in the drop-down list are as follows:

- All
- Topics waiting to be published
- Public
- Expired

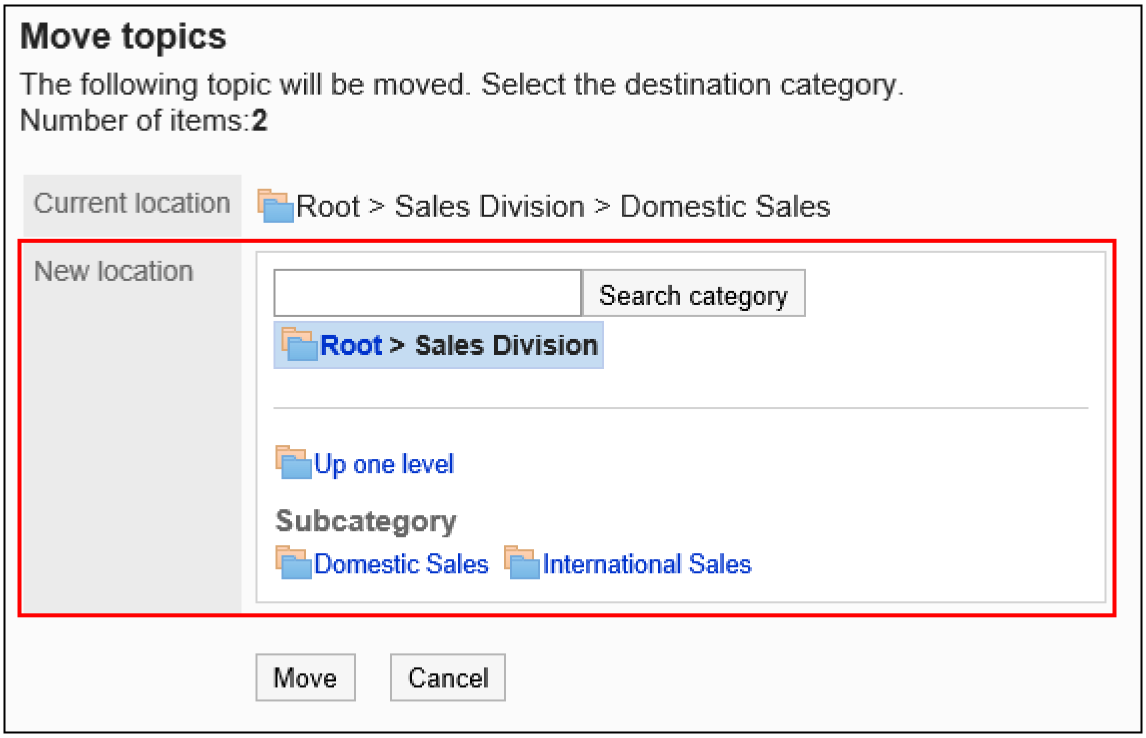
7. **Select the check boxes of the topics to move, and click "Move".**

8. On the screen to move topics, select the category to move into, then click "Move".

You can search for categories to move categories into by entering keywords and clicking "Category search".

Clicking "Move up" moves the category up one level.

Clicking on a category name moves you to the subcategory of the category you clicked. Numbers represent the number of subcategories.



Note

- The value of "b" in "(a/b)" that is displayed in Acknowledgment status is not changed even though the topic is moved.
  a: Number of users who viewed the topic
  b: Number of users who have been set as notification recipients for the category where the topic exits, at the time when the topic was posted.

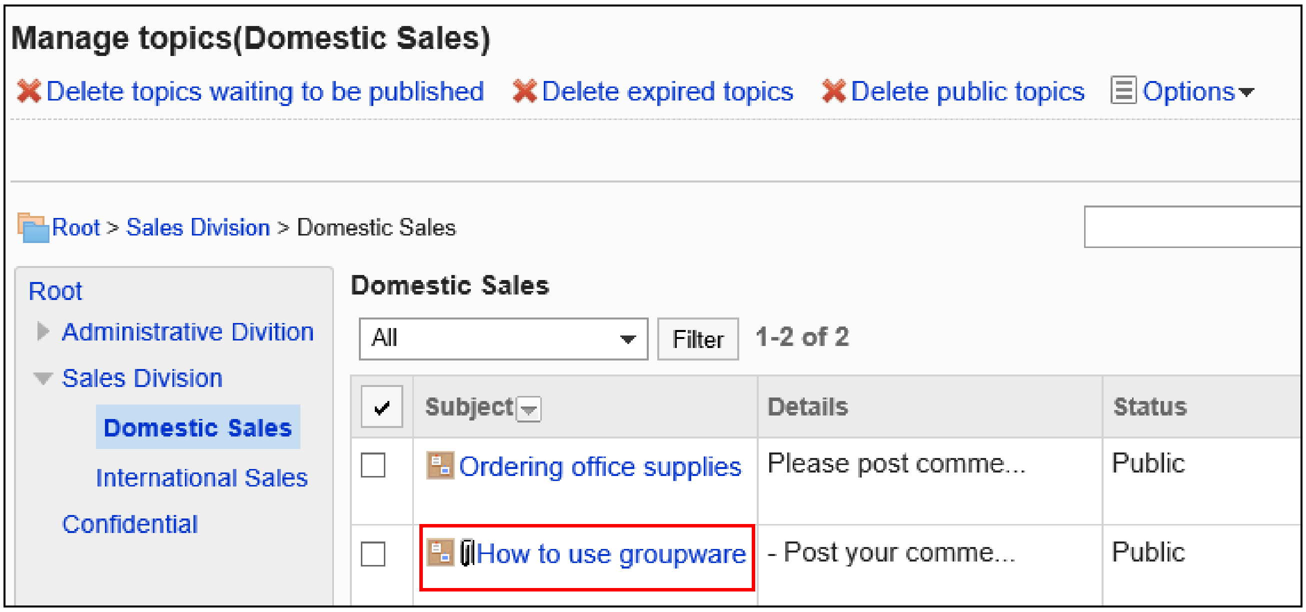
Working with Attachments in Topics

You can work with bodies of topics and files attached to comments.
You can't perform operations on images inserted using Rich Text Formatting.

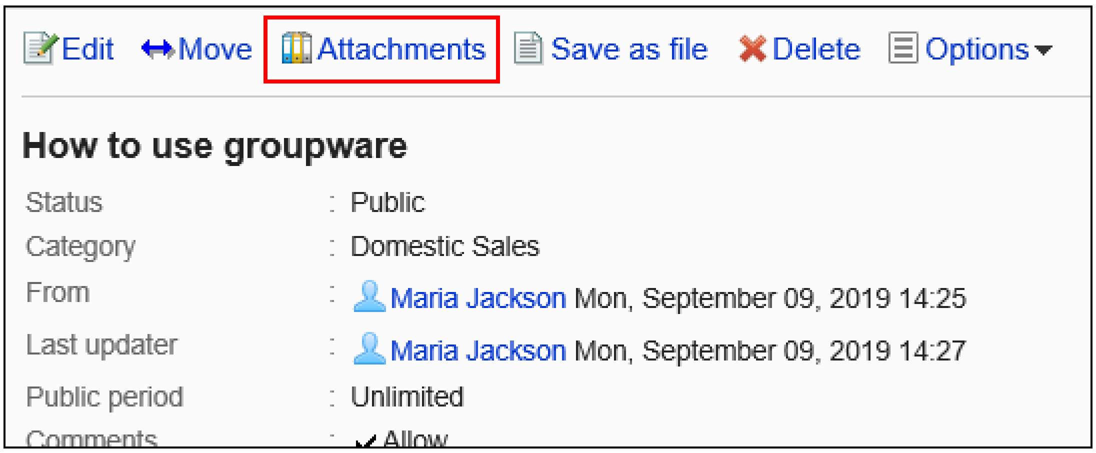
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click the item to manage topics.**
6. **On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".**
   The statuses of the topics in the drop-down list are as follows:
   - All
   - Topics waiting to be published
   - Public
   - Expired

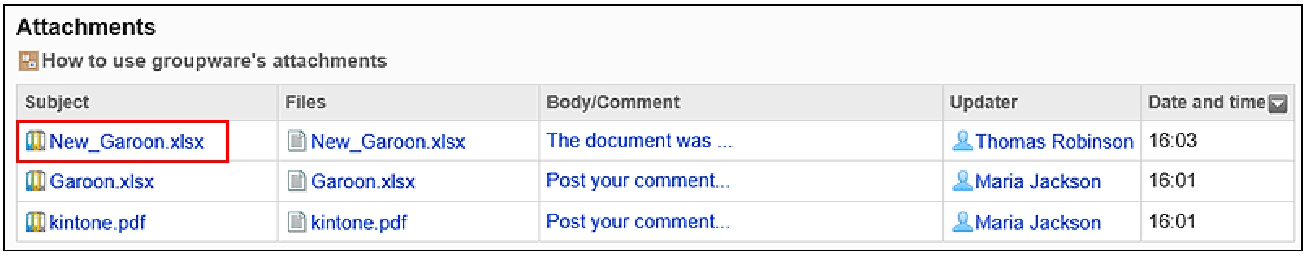
7. **Click the topic title for which you want to perform actions on attachments.**



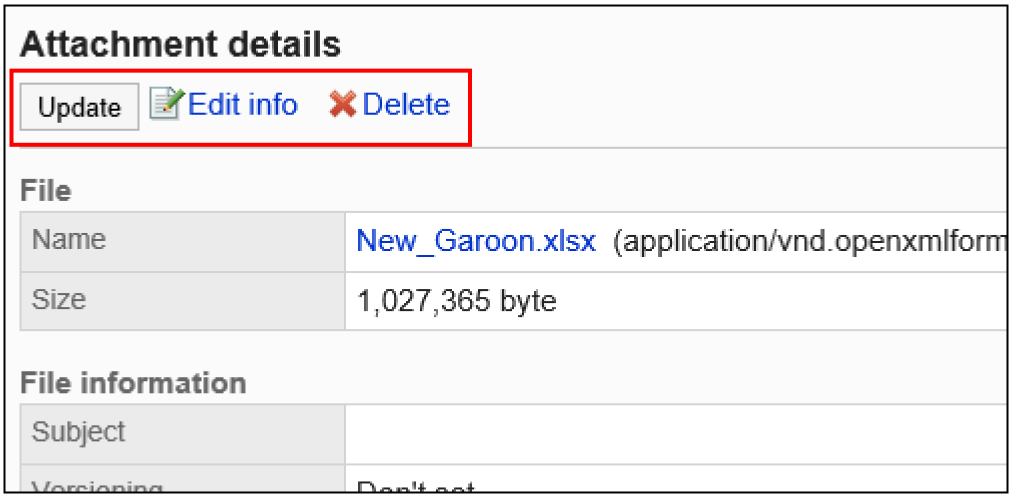
8. **In "Topic details" screen, click "Attachments".**



9. **On the attachment list screen, click the title of the file to work with.**



10. In "Attachment details" screen, click the link you want to perform.



For details of managing attachments, refer to the following page:

Updating Files

Changing File Information

Deleting Files

Exporting Topics to a File

You can export topics to text files.

Draft topics cannot be exported to a file.

The following items are exported files.

- Subject
- From
- Category
- On
- Posting period
- Body
- Attachment file name:

  Attachment files themselves cannot be exported. Export contains only the file names.
- Comments:

  Older comments come to the top, which is the reverse order to the contents of the topic details.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

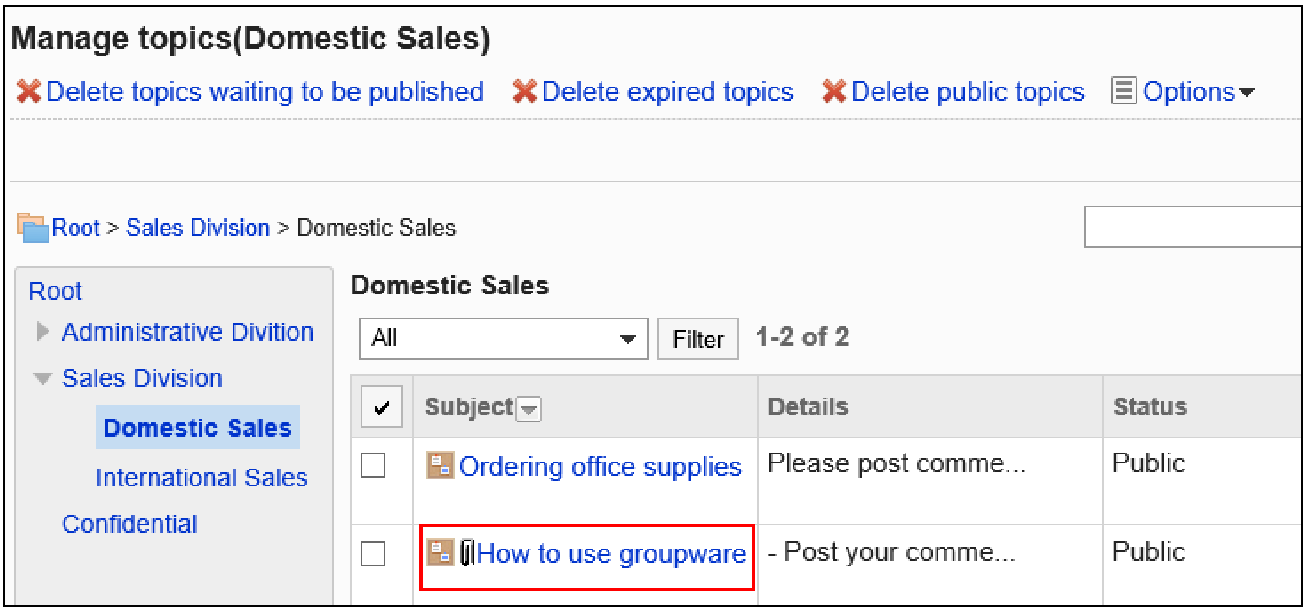
3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

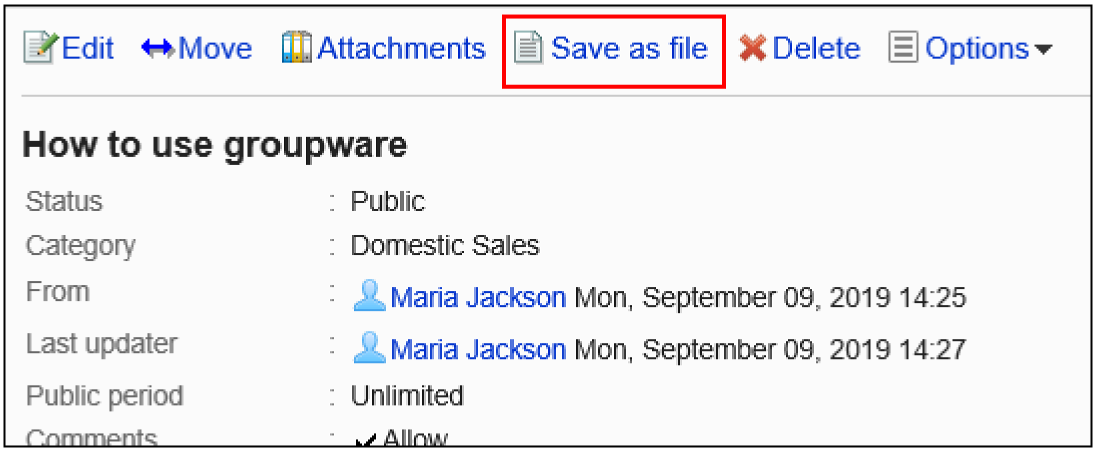
5. **Click the item to manage topics.**

6. **On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".**
   The statuses of the topics in the drop-down list are as follows:
   - All
   - Topics waiting to be published
   - Public
   - Expired

7. **Click topic titles to export to a file.**



8. **In "Topic details" screen, click "Save as file".**

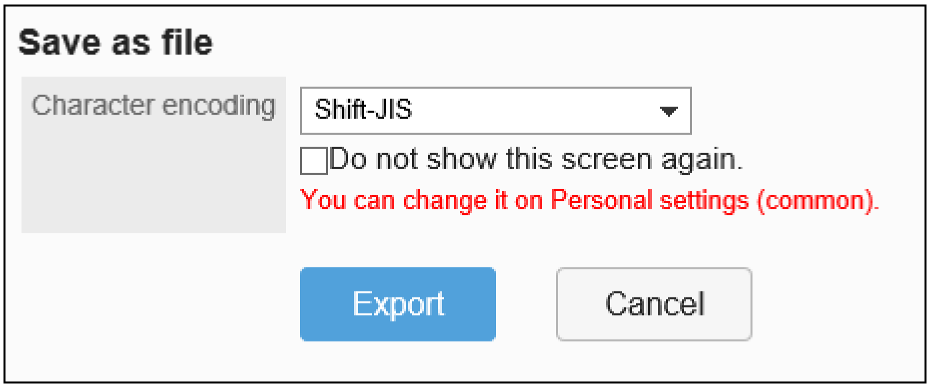


9. **On the "Save as file" screen, set the field for character encoding.**

The following character encoding can be selected:

- Unicode (UTF-8)
- Japanese (Shift-JIS)
- ASCII
- Latin1 (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)

If you select the check box not to show this screen from the next time, the topic is exported to a file without displaying the "Save as file" screen.



10. **Confirm your settings and click "Export".**

11. **Save the file with a function provided by your Web browser.**

Deleting Topics

You can delete topics.

The deleted topics will be removed from all users.

Caution

- The deleted topics cannot be restored. Check the contents of the topics before you delete them.

Deleting Topics One by One

Delete each topic.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

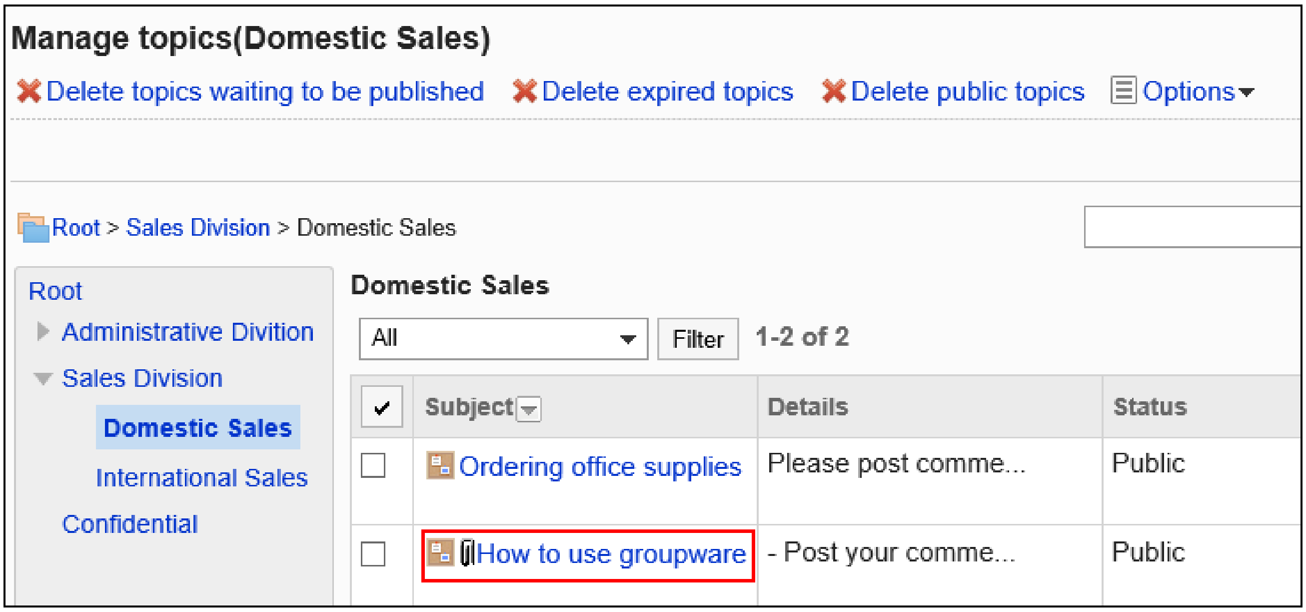
5. **Click the item to manage topics.**

6. **On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".**

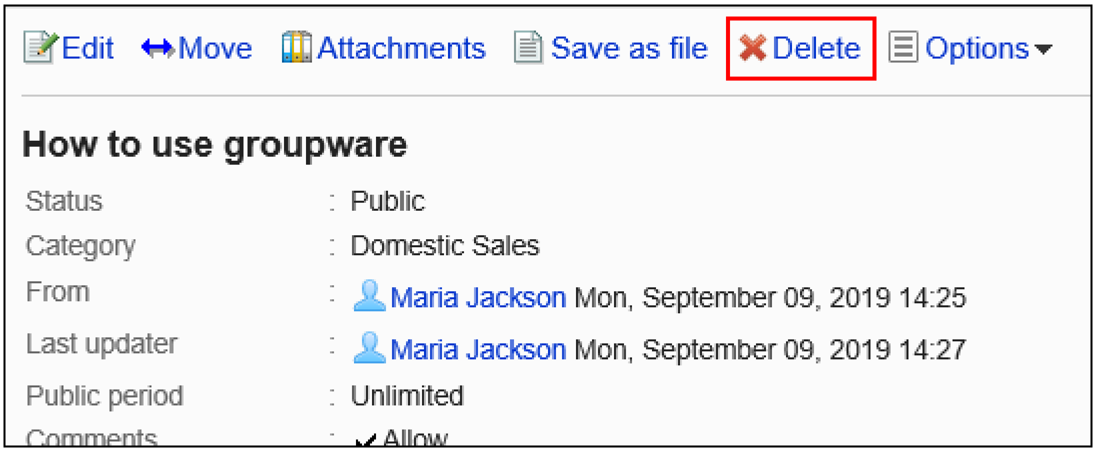
The statuses of the topics in the drop-down list are as follows:

- All
- Topics waiting to be published
- Public
- Expired

7. **Click the topic title to delete.**



8. **On the topic details screen, click "Delete".**



9. **Click "Yes" on the page to delete topics.**

Deleting Multiple Topics in Bulk

Delete multiple topics at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click the item to manage topics.**

6. **On the screen to manage topics, select a category, then select the status of the topics from the drop-down list, and click "Filter".**

The statuses of the topics in the drop-down list are as follows:

- All
- Topics waiting to be published
- Public
- Expired

7. **Select the check boxes of the topics to delete, and then click "Delete".**

8. **Click "Yes" on the screen to delete topics.**

Deleting All Waiting Topics

Delete all topics waiting to be published in the selected category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

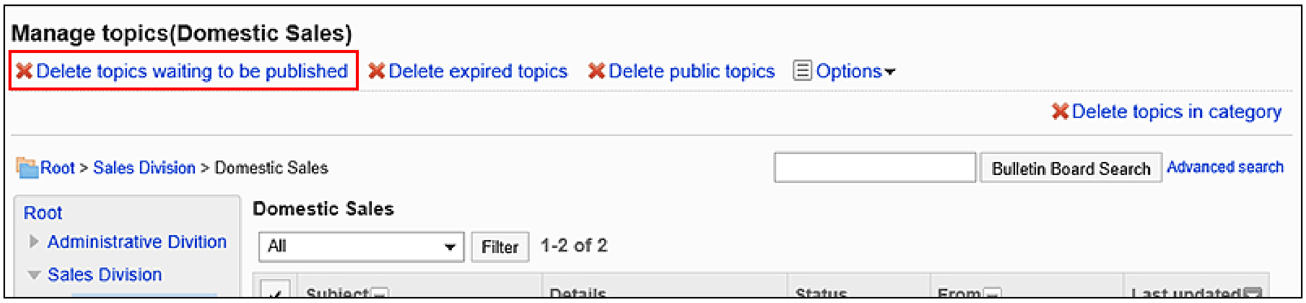
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click the item to manage topics.**

6. **On the screen to manage topics, click the item to delete waiting topics.**



7. **Click "Yes" on the screen to delete all topics waiting to be published.**

Deleting All Expired Topics

You can delete all topics expired in the selected category.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

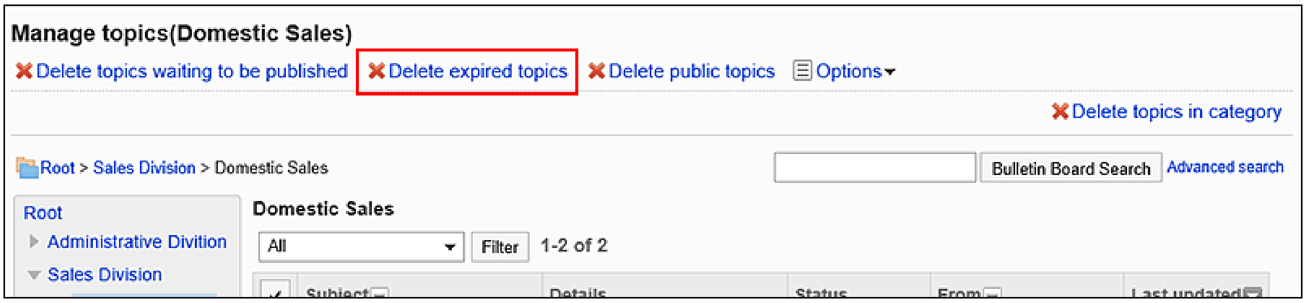
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click the item to manage topics.**

6. **On the screen to manage topics, click the item to delete expired topics.**



7. **Click "Yes" on the screen to delete all expired topics.**

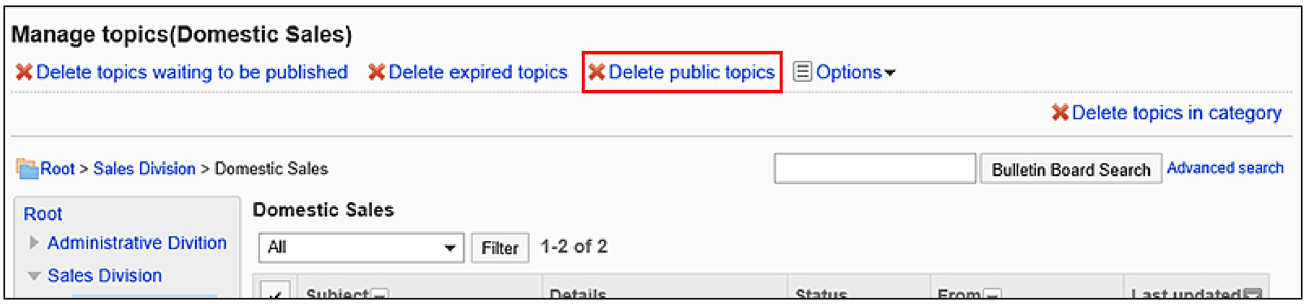
Deleting Public Topics in Bulk by Specifying Date

To delete all public topics that have been updated prior to the specified date:

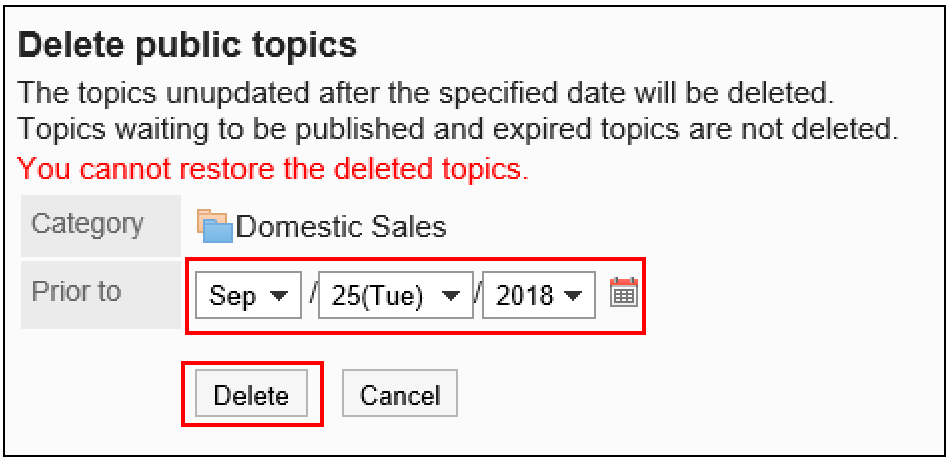
- Public topics
- The last update date is earlier than the specified date

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Bulletin Board".**
5. **Click the item to manage topics.**
6. **On the screen to manage topics, click the item to delete public topics.**



7. **On the screen to delete all public topics, select a date, and then click "Delete". All schedules before the date will be deleted.**



Posts updated after the selected date will not be deleted.

Example: If you select August 7, 2012 as the date for deletion

- Topics last updated on August 06, 2012: Deleted
- Topics last updated on August 07, 2012: Not deleted

8. Click "Yes" on the screen to delete all public topics.

Deleting All Topics in a Category

Deletes all topics in the selected category.

Steps:

1. Click the administration menu icon (gear icon) in the header.

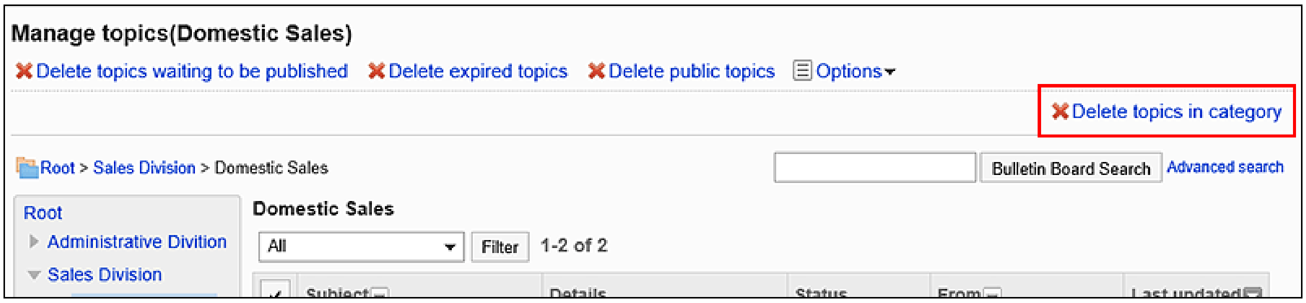
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Bulletin Board".

5. Click the item to manage topics.

6. On the screen to manage topics, select a category, and then click the item to delete all topics in the category.



7. Click "Yes" on the page to delete all topics in the category.

2.6.7. Managing Bulletin Board Using CSV Files

Manage bulletin board data using CSV files.

The following data can be managed using CSV files:

- Category
- Category names
- Access Permissions
- Operational Administrative Privileges
- Notification Settings

Importing Data from a CSV File

Import bulletin board data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. Create a CSV file to import data.

For information on items that can be managed in CSV files, refer to the topic about Bulletin Board(1851Page) CSV format.

2. Click the administration menu icon (gear icon) in the header.

3. Click "System settings".

4. **Select "Application settings" tab.**

5. **Click "Bulletin Board".**

6. **Click "Import from CSV file".**

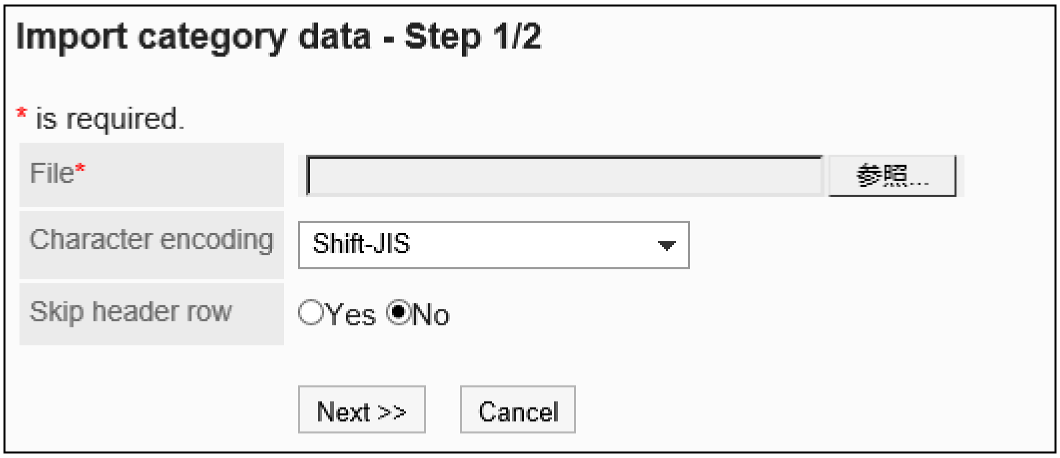
7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the data to import, and click "Next".**

   The setting fields are as follows:

   - Character encoding:
     Encodes data from a CSV file with the selected character code.
     Following character codes can be selected.
     - Unicode (UTF-8)
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)
   - Skip the first row:
     If the header row contains information other than data such as an item name and a comment, select "Yes".



10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

Export bulletin board data to CSV files.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Bulletin Board".**

5. **Click "Export to CSV file".**

6. **On the "Export to CSV File" screen, select the data to export.**

7. **Set the required items for the the data to export.**

   The setting fields are as follows:

   - Character encoding:
     Select the character code that you want to use for encoding.
     Following character codes can be selected.
     - Unicode (UTF-8)
       You can select with BOM as required.
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)
   - Include header row:
     To export an item name to the header row of a CSV file, select "Yes".
   - Language in which the data is exported:
     This field is displayed when you export category names.
     Set the language in which you export category names. You can set multiple languages.
     The following languages can be selected:
     - All
     - 日本語
     - English
     - Simplified Chinese
     - Traditional Chinese
       Exported in Traditional Chinese.

8. Confirm your settings and click "Export".

9. Save the file with a function provided by your Web browser.

2.7. Cabinet

"Managing Files" is an application for managing files shared internally. You can categorize files by creating folders for each department or purpose.
When you set update notifications for folders, notifications are sent when files are added or updated. This is useful for checking file updates.

References

- General settings for managing files(1016Page)
- Setting Up Folders(1017Page)
- Setting operational administrative privileges for folders(1029Page)
- Setting Access Permissions for Folders(1036Page)
- Notification Settings(1050Page)
- Add file

2.7.1. General Settings for Cabinet

In the "General settings" screen of the file administration, you can set basic functions for managing files.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

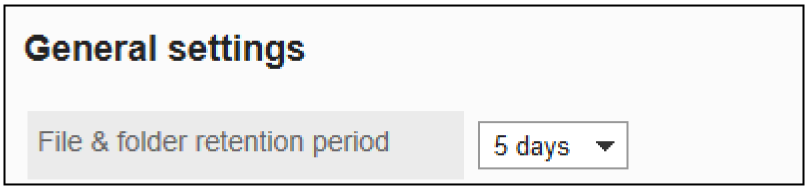
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "General Settings".**

6. **Select a retention period in the "Deleted Files/Folders" field on the "General settings" screen.**

   Sets the period of time to temporarily save files and folders that have been deleted from file management.
   Only the system administrator and the application administrator can restore the files in Trash.
   The number of days that can be set is 1 to 10 days in increments of one day.

7. **In the "Bulk download upper Limit" field, select a file size.**

   When you want to download multiple files in one zip file, you can set the maximum file size limit to be downloaded at a time.
   Sets the total value of the file size before the zip file is compressed. The default value is 30 MB.
   The available file sizes are as follows
   - 5MB
   - 10MB
   - 30MB
   - 50MB
   - 100MB
   - 300MB
   - Unlimited

8. **Confirm your settings and click "Save".**

2.7.2. Setting Up Folders

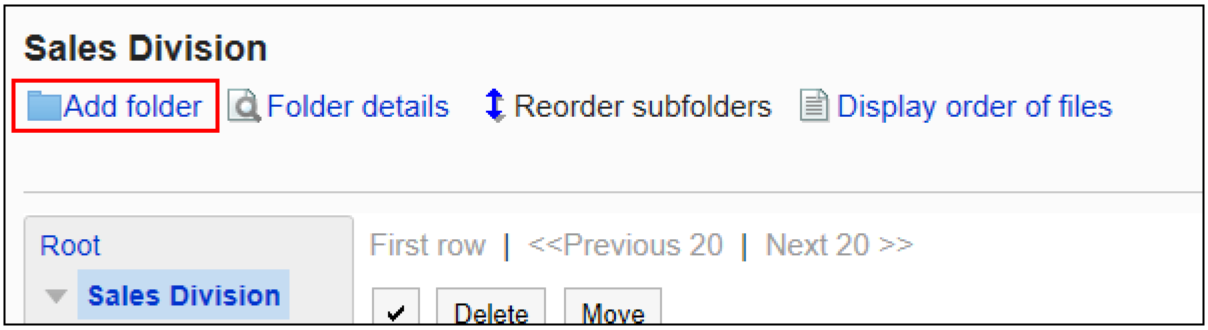
Files in Cabinet are managed on a folder basis.
Set up a folder for each department and set up permissions and update notifications. Folders can be layered.

Adding Folders

Add a subfolder to the folder.
When you add a subfolder, you can inherit the permissions and notification settings that are set in the parent folder or in subfolders in the parent folder.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Folder Settings".**
6. **On the "Folder Settings" screen, select a folder and click "Add Folder".**



7. On the "Add Folder" screen, set the "title" field.

You should set the default subject.

Clicking "Add localized name" allows you to set subjects in multiple languages.

If you do not set the subject in the user preference language, the default subject is displayed.

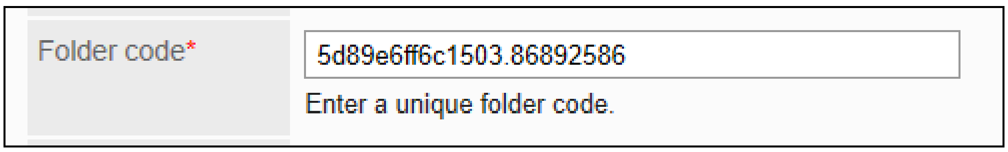
The following languages can be set:

- 日本語
- English
- Simplified Chinese
- Traditional Chinese
  Displayed in Traditional Chinese.

8. Set the "Folder Code" field.

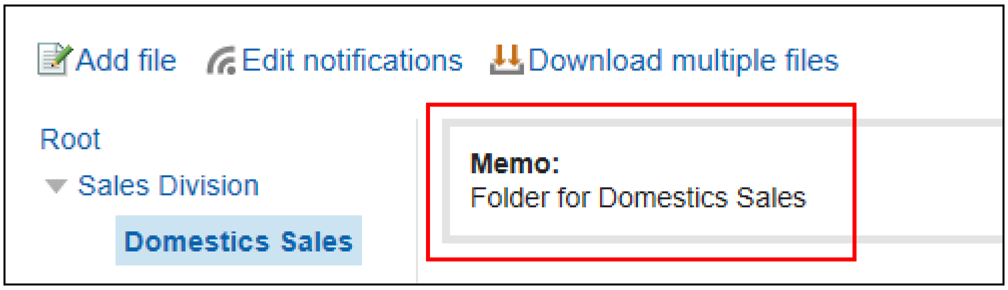
Always set the folder code.

Unique code for identifying folders.



9. Set the Notes field as necessary.

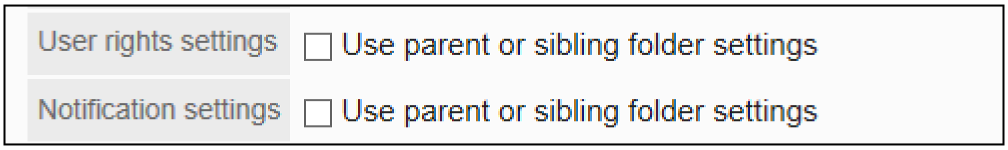
Enter a description of the folder. When set, notes are displayed on the folder screen.



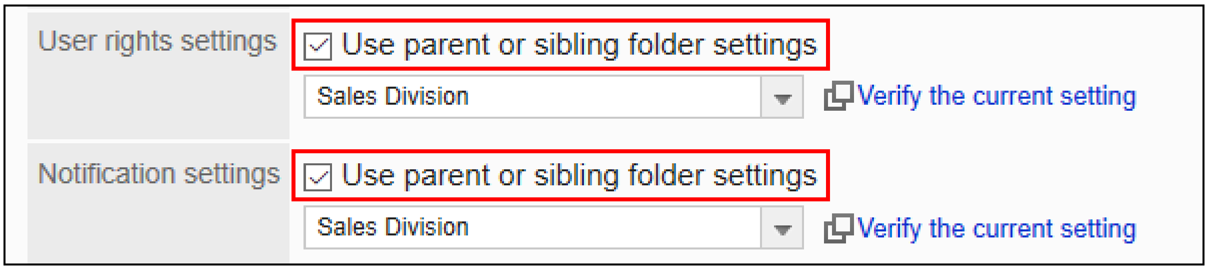
10. **In the "User Rights" field and the "Notification Settings" field, select whether to apply the settings of the parent folder or other folders belonging to the same parent folder.**

The default value is applied to the parent folder or its parent subfolder.

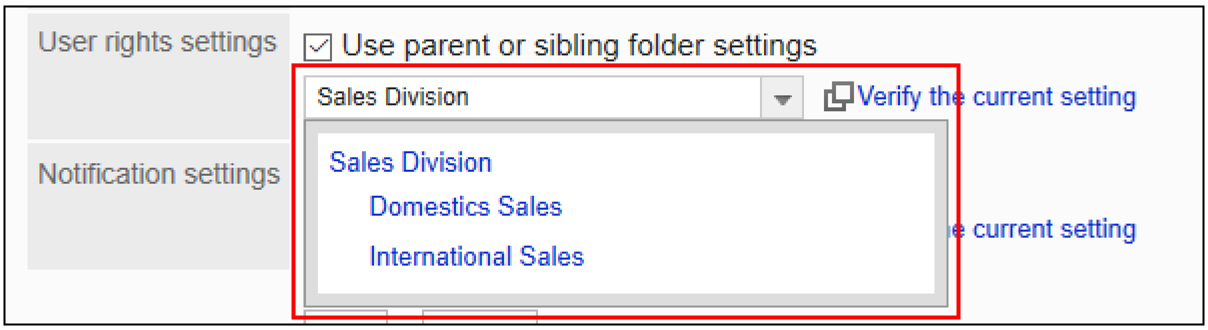
- **If you do not want to apply the settings of a parent folder or a parent subfolder:**
  Clear the check box for "Enforce permissions on parent folders or subfolders of parents" and "apply notification settings for parent folders or parent subfolders".



- **When you want to apply the settings of a parent folder or a parent subfolder:**
  Select the check box for "Enforce permissions on parent folders or subfolders of parents," and "apply notification settings for parent folders or parent subfolders".

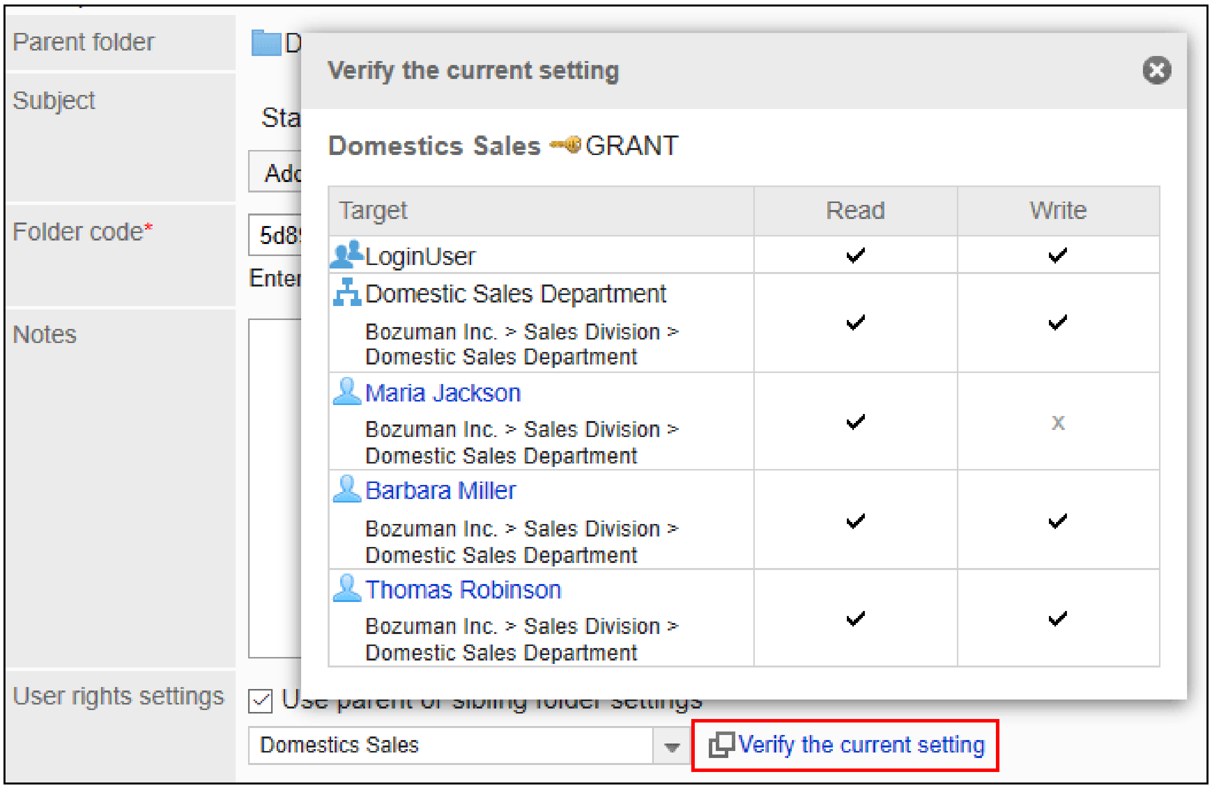


  Select the folder where you want to apply the settings from the "User rights" and "Notification settings" drop-down list.



Note

- After you have applied the permissions and notification settings, the settings in the original folder are not applied to the target folder.
- To check the settings of a folder that you have applied from the drop-down list, click "Confirm Permissions" and "Confirm the notification recipients" to confirm the settings.



11. Confirm your settings and click "Add".

Changing Folders

Change the settings in the folder.

Steps:

1. Click the administration menu icon (gear icon) in the header.

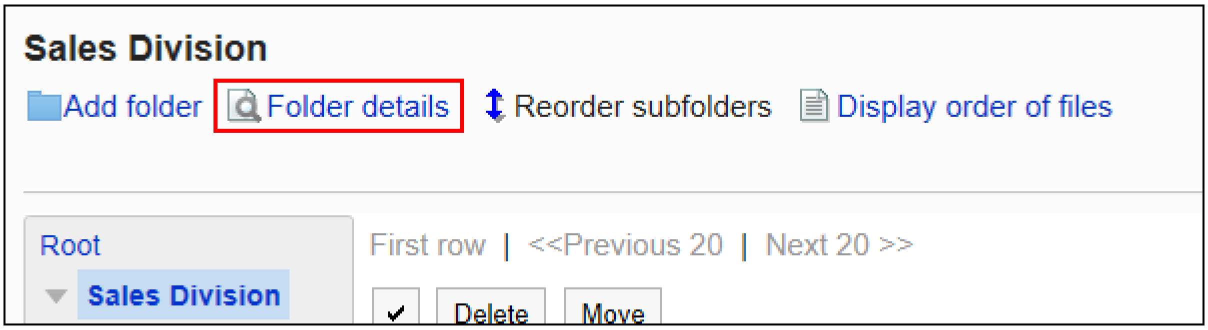
2. Click "System settings".

3. Select "Application settings" tab.

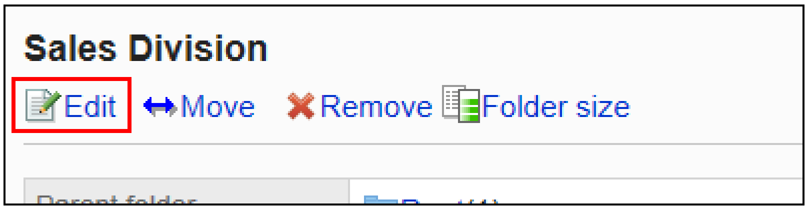
4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select a folder and click "Folder Details".**



7. **On the item for folder details, click "Edit".**



8. **On the "Change folder Information" screen, you can change the settings as necessary.**

9. **Confirm your settings and click "Save".**

Moving Folders

Move the subfolder to another folder.

When you move a folder, the files and subfolders in the folder are also moved.

The Root folder cannot be moved.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

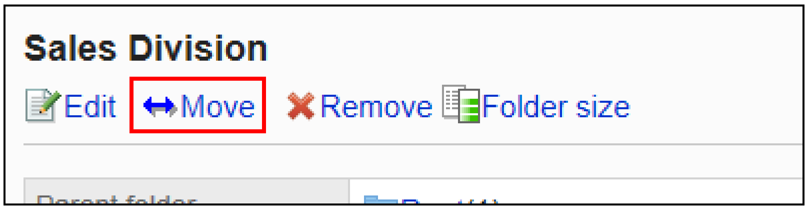
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select a folder and click "Folder Details".**

7. **On the "Folder Details" screen, click "Move".**

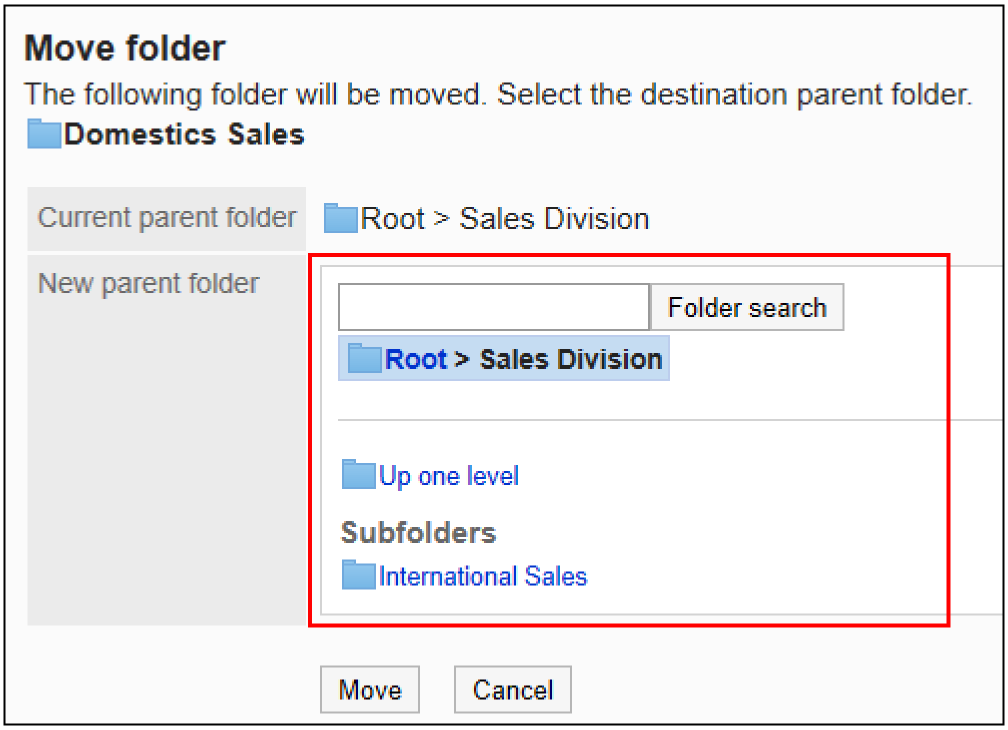


8. **On the "Move Folder" screen, select the folder that you want to move in the "parent folder after moving" field.**

You can search the destination folder by entering keywords and clicking Search Folder.

Clicking up one moves the folder up one.

Clicking a folder name moves it to the subfolder you clicked. Numbers represent the number of subfolders.



9. **Confirm your settings and click "Move".**

Reordering Subfolders

You can reorder subfolders.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

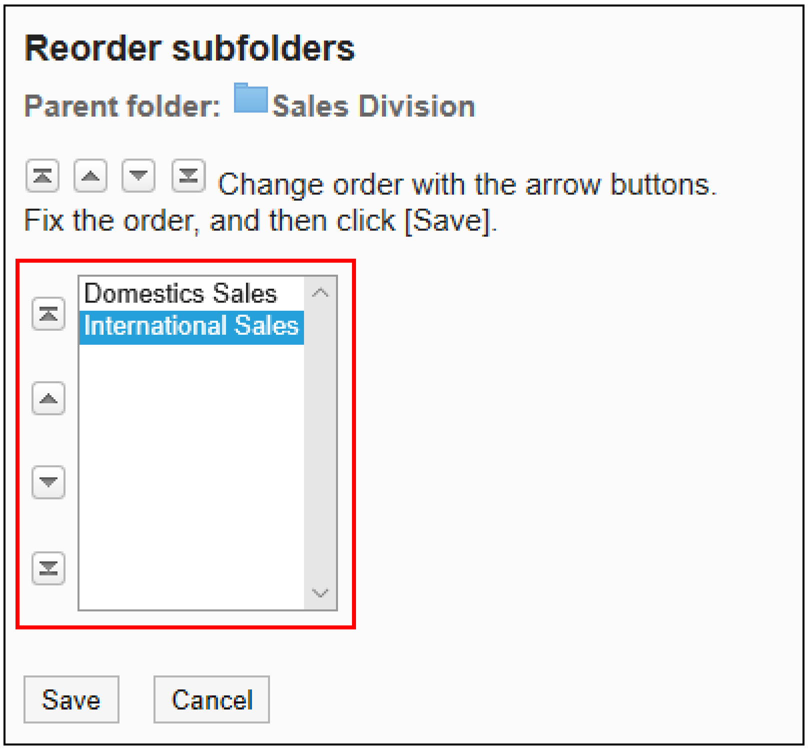
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select a folder, and then click Reorder Subfolders.**

7. **On the Reorder Subfolders screen, reorder folders.**



8. **Confirm your settings and click "Save".**

Deleting Folders

You can delete folders.

If you delete a folder, the files and subfolders in the folder are also deleted.

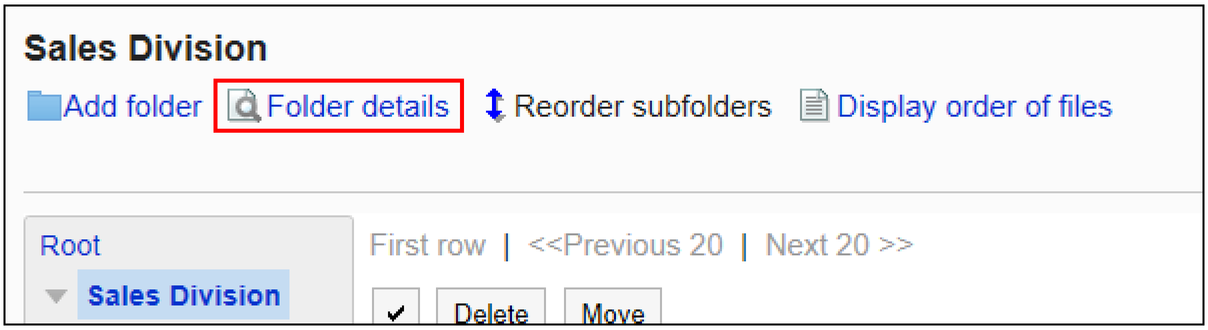
Cannot delete root folder

Caution

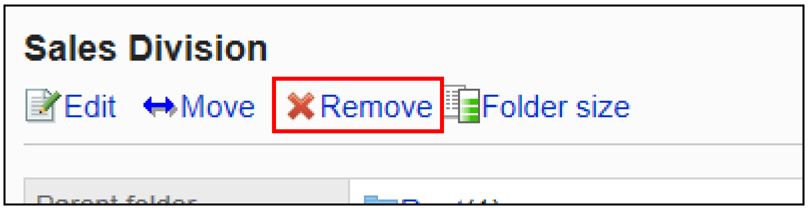
- Deleted folders and files cannot be restored.
- Operational administrators can delete folders if they have operational administrative privileges for the parent folders of the folders to be deleted. Therefore, the administrators may accidentally delete subfolders for which they do not have any view privileges in the folders.
  Please consult with your system administrators or application administrators if you can delete those folders.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Folder Settings".**
6. **On the "Folder Settings" screen, select a folder and click "Folder Details".**



7. **On the item for folder details, click "Delete".**



8. **Click "Yes" on the page to delete folders.**

Deleting Folders Permanently

Permanently delete deleted folders.

All subfolders and files in the selected folder are also permanently deleted.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

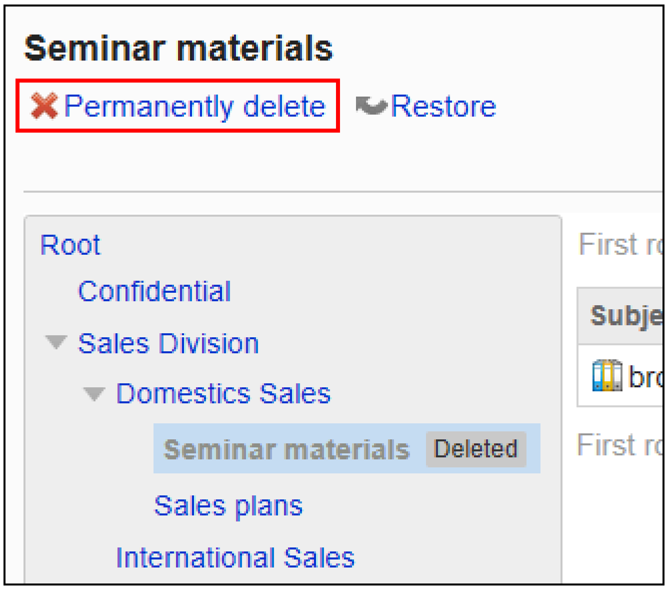
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select the folder where "deleted" is displayed.**

7. **Click "Permanently delete".**



8. **Click "Yes" on the "Permanently delete folder" screen**

Restoring Deleted Folders

Restores deleted folders.

Only system administrators and application administrators can restore deleted folders.

If you move the folder back, the subfolders and files that were saved before the deletion are also restored.

However, you cannot restore all access permissions configured before the deletion.

The settings for access permissions, recipients, and operational administrative privileges after the restore will be as follows:

- Access permissions:
    - Parent folders:
      The "GRANT (Only users on list have access)" setting is set for the security model and the number of configured access permissions becomes zero.
      All organizations, users, and roles cannot view and add files until the access permissions are configured.
    - Subfolders under parent folders:
      The settings before the folder deletion are restored.
      However, you cannot view and add files until you configure access permissions to their parent folders.
- Recipients:
    - The settings before the folder deletion are restored for both parent folders and subfolders.
- Operational administrative privileges:
    - The settings before the folder deletion are restored for both parent folders and subfolders.

Note

- You cannot undo only files in a folder. You need to specify the folder where the files that you want to restore are stored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

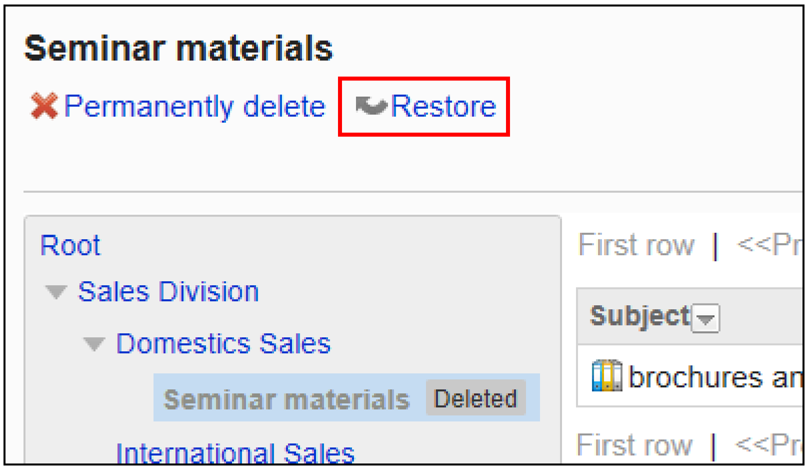
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select the folder where "deleted" is displayed.**

7. **Click Undo.**



8. **Click "Yes" on the "Restore folder" screen.**

   The restored folder is moved to it's original folder.

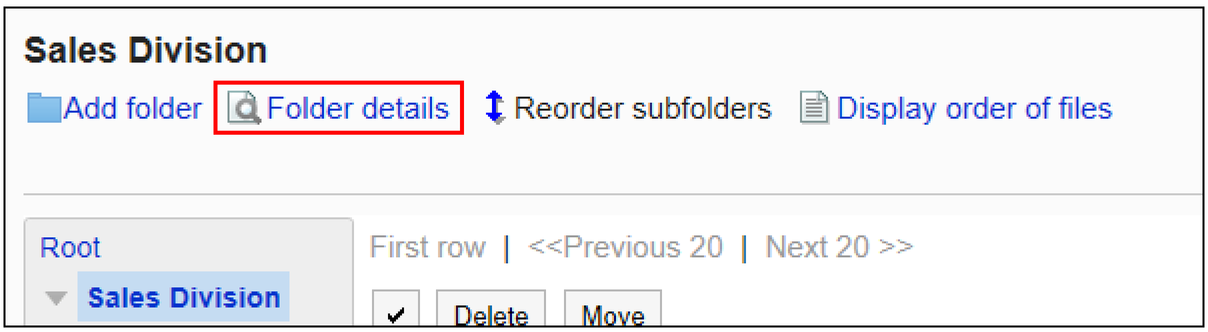
Checking Folder Usage

Check the folder usage.

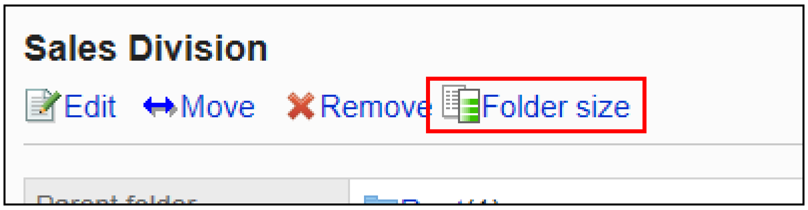
You can check the usage of each folder.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select the "Manage each Application" tab.**
4. **Click "Cabinet".**
5. **Click "Folder Settings".**
6. **On the "Folder Settings" screen, select a folder and click "Folder Details".**



7. **Click "Usage List" on the "folder Details" screen.**

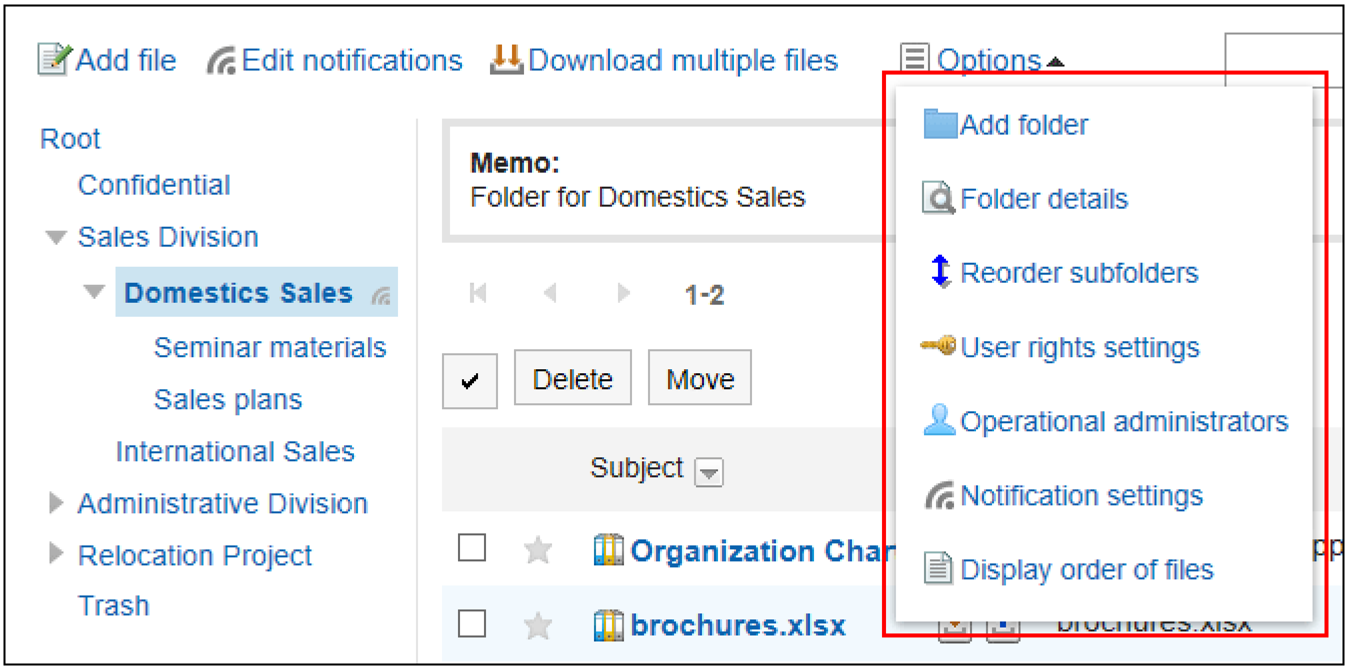


8. **On the "Usage List" screen, confirm the usage of the folder.**

2.7.3. Setting Operational Administrative Privileges for Folders

Operational administrators are users who have been granted operational administrative privileges from the system administrator.

When set as operational administrator, "Options" is displayed on the "File management" screen, and a menu for managing folders and files is displayed on the user screen.



Operational administrators can do the following tasks:

- Adding a Folder
  For details, refer to how to add a folder(1017Page).
- Folder details
  Displays the details of the selected folder.
- Reorder Subfolders
  For details, refer to how to reorder subfolders(1022Page).
- User Rights settings:
  For details, refer to Setting permissions for a folder(1036Page).
- Operational administrators:
  Set operational administrators in the selected folder.
- Notification settings:
  For details, refer to Notification Settings(1050Page).
- Display Order of files
  For details, refer to How to set the default file order(1058Page).

Adding Operational Administrative Privileges

Grant operational privileges for each folder.

Operational administrative privileges are inherited by subfolders.

Steps:

1. Click the administration menu icon (gear icon) in the header.

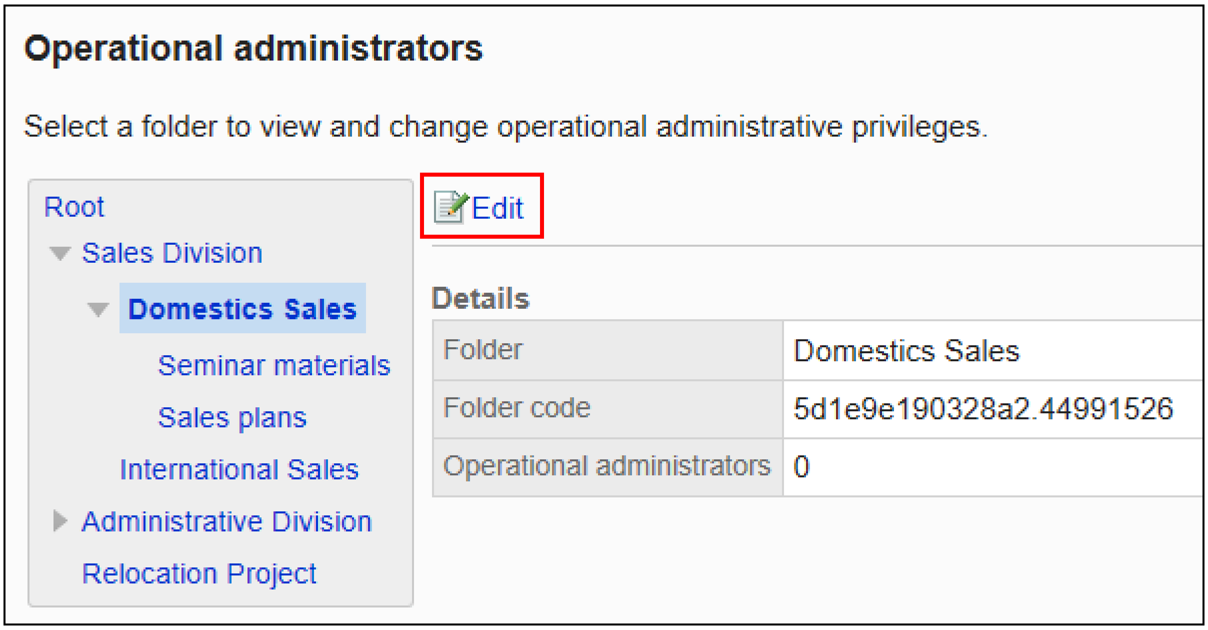
2. **Click "System settings".**

3. **Select "Application settings" tab.**

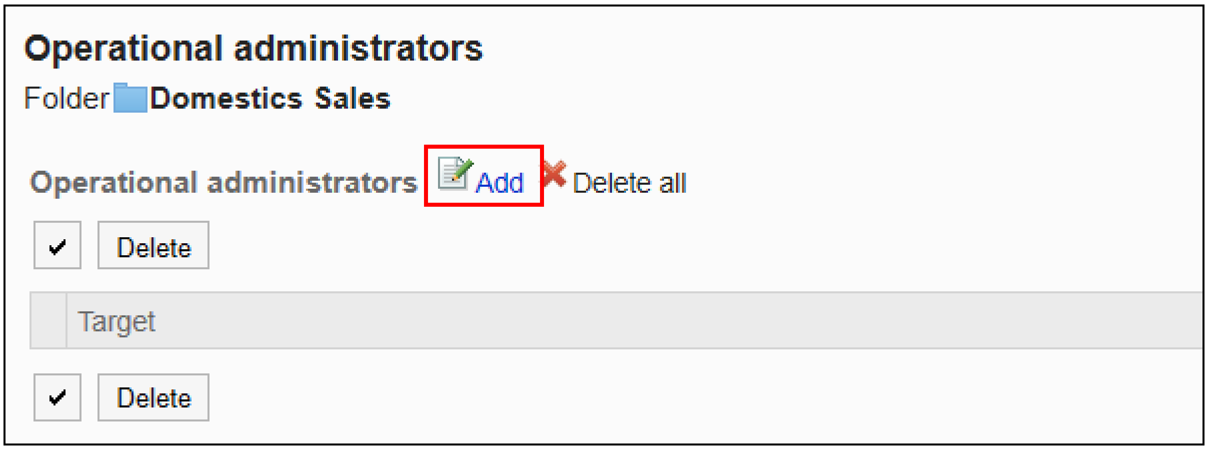
4. **Click "Cabinet".**

5. **Click "Operational administrators".**

6. **On the "Operational Administrative Privileges Settings" screen, select a folder and click "Save".**



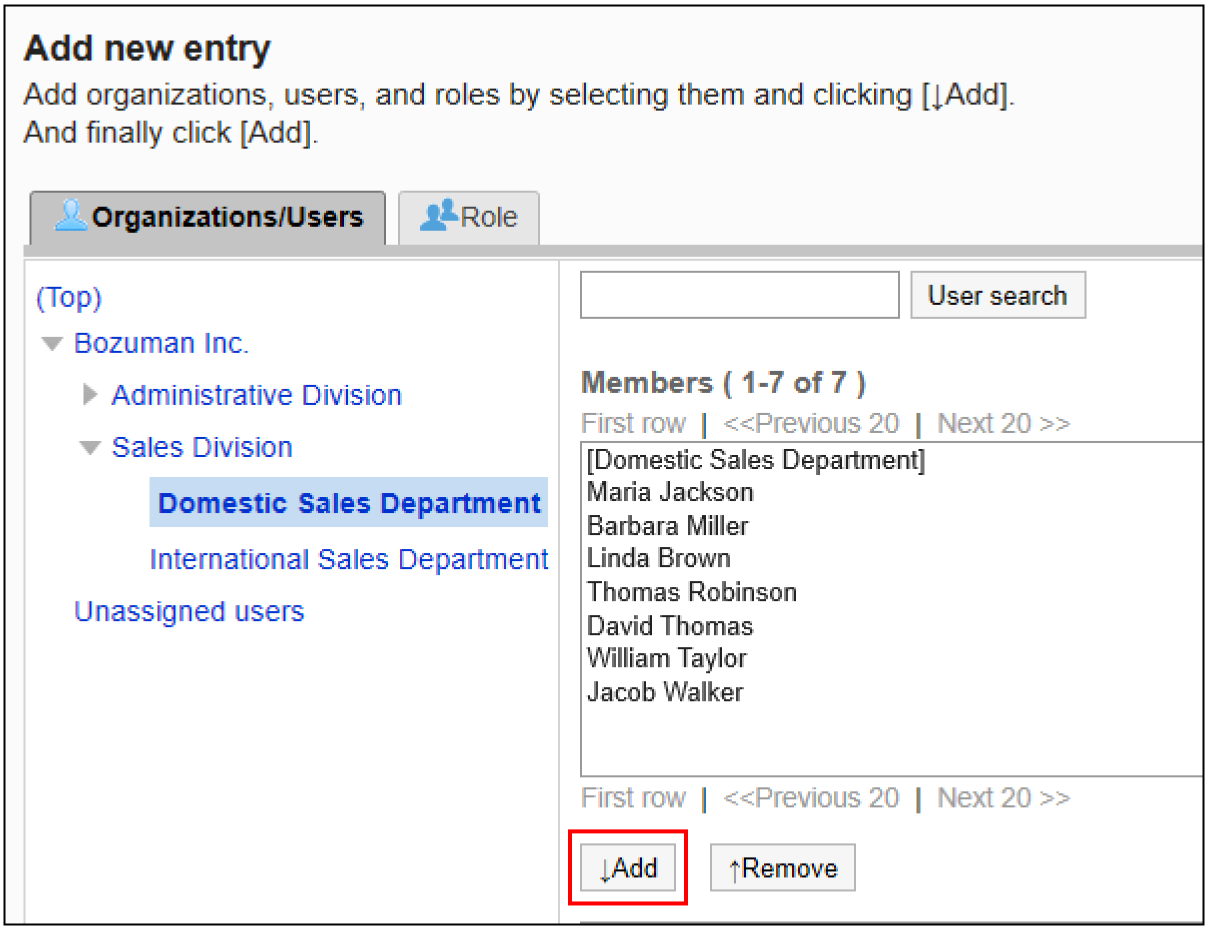
7. **On the screen for operational administrative privilege list, click "Add".**



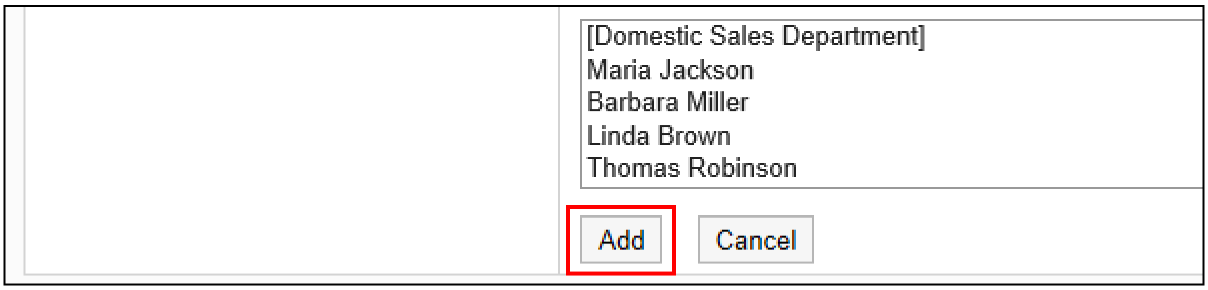
8. **On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. **Confirm your settings and click "Add".**



Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

If you delete operational administrative privileges, users who have been deleted by the user will not be able to administer the folder on the "Manage Files" screen.

Caution

- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

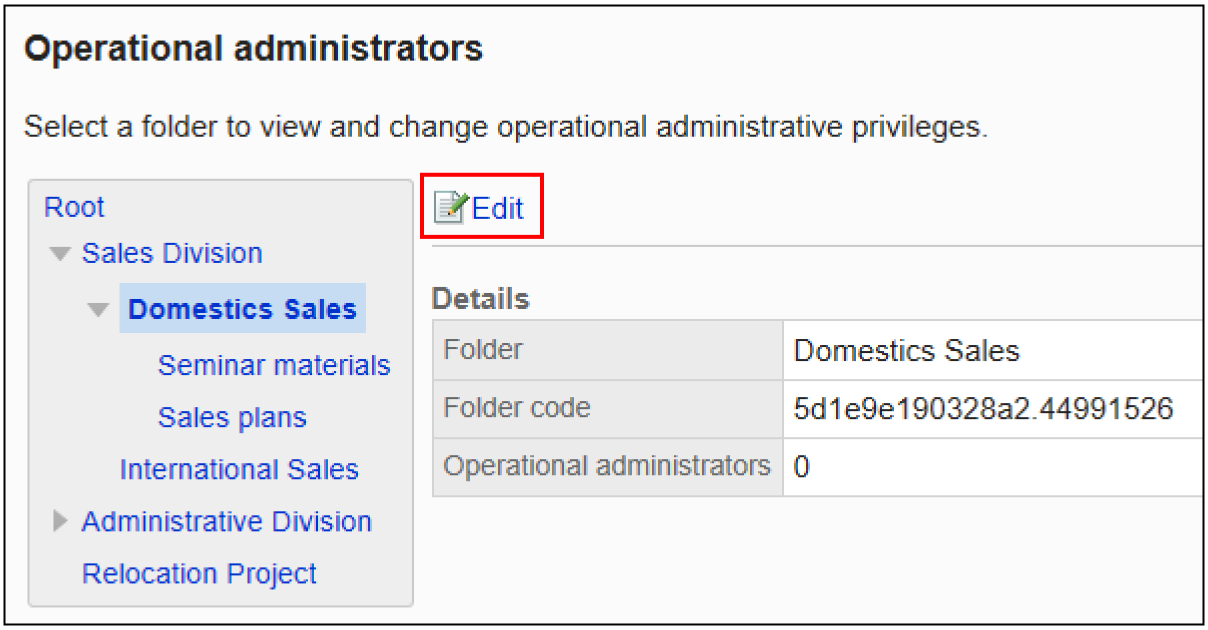
2. **Click "System settings".**

3. **Select "Application settings" tab.**

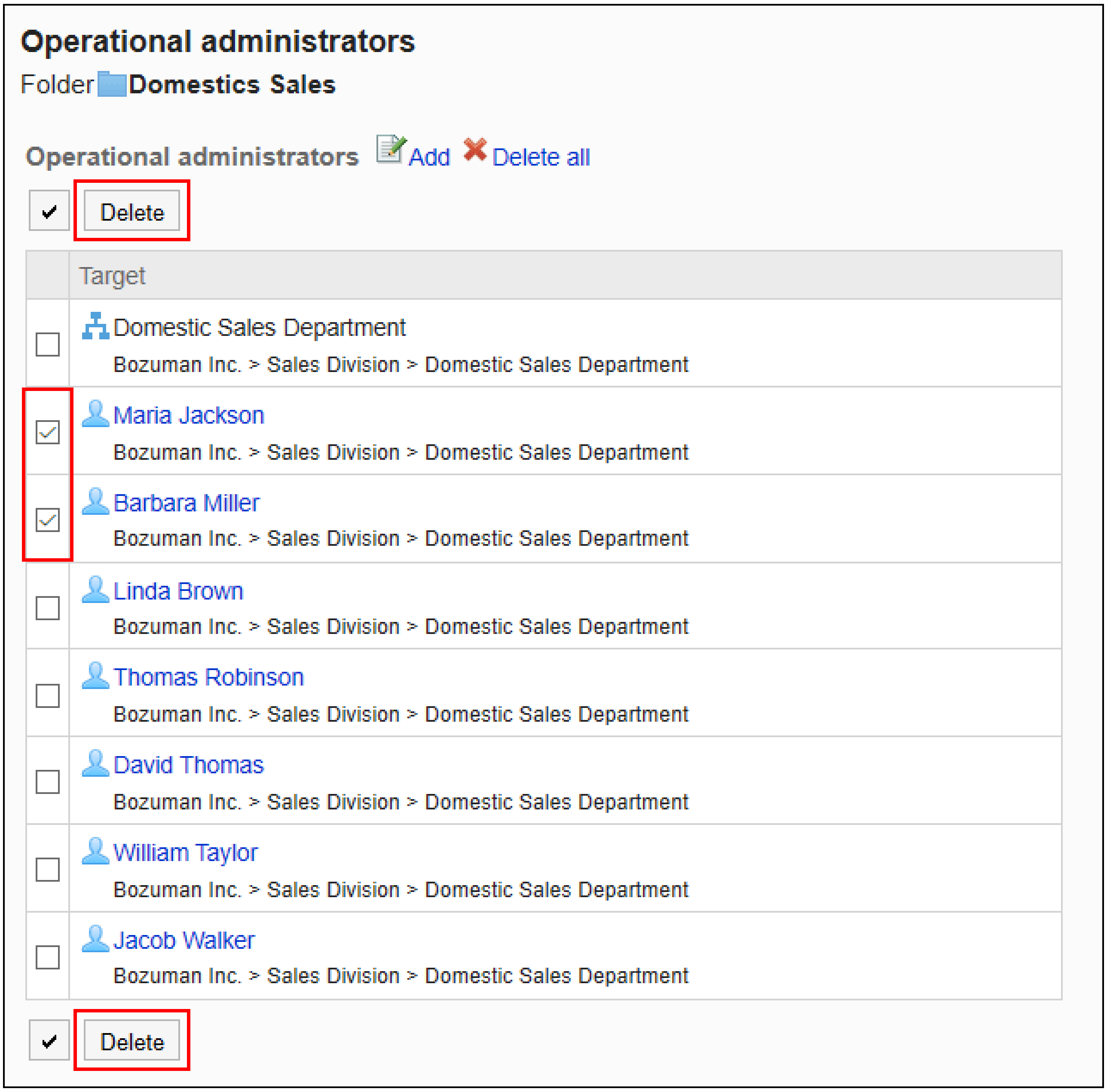
4. **Click "Cabinet".**

5. **Click "Operational administrators".**

6. **On the "Operational Administrative Privileges Settings" screen, select a folder and click "Save".**



7. **On the screen for operational administrative privilege list, select the check boxes of the operational administrative privileges to delete, then click "Delete".**



8. **Click "Yes" on the screen to delete all operational administrative privileges.**

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

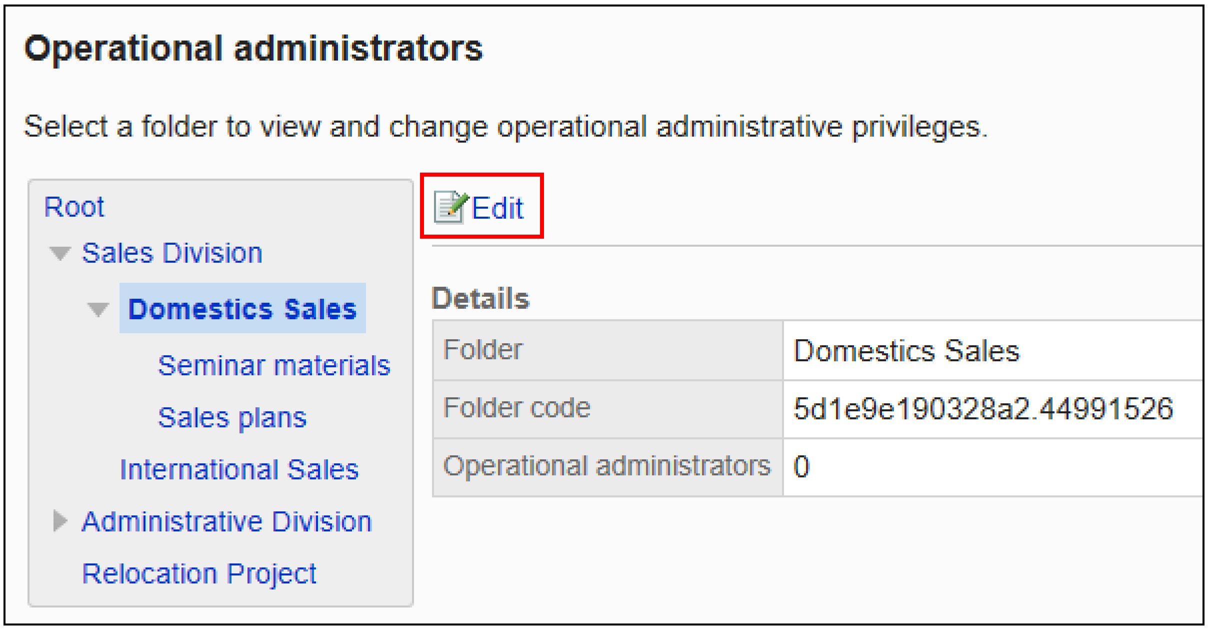
2. **Click "System settings".**

3. **Select "Application settings" tab.**

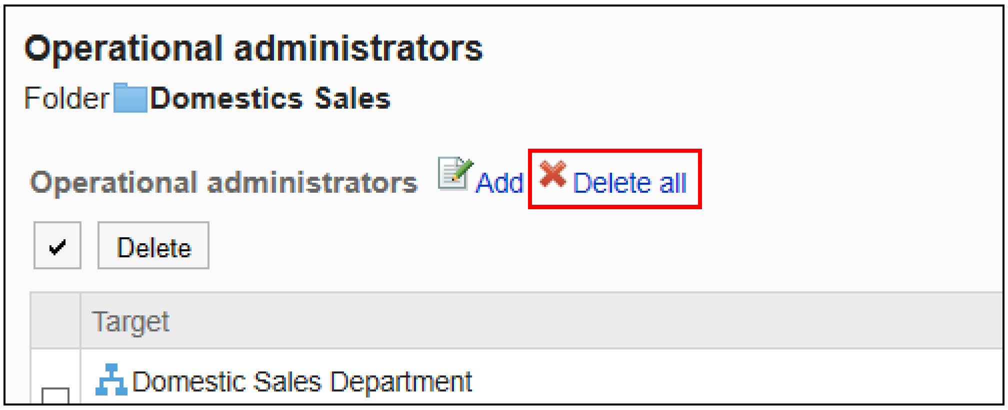
4. **Click "Cabinet".**

5. **Click "Operational administrators".**

6. **On the "Operational Administrative Privileges Settings" screen, select a folder and click "Save".**



7. **On the screen for "List of operational administrative privilege", click Delete all.**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.7.4. Setting Access Permissions for Folders

For a folder, set the following permissions for the organization, user, or role.

- Access permissions
- Write permission (permission to add a file to a folder)

The permissions for managing files vary by security model.
The default settings are as follows:

- Root:
  The "GRANT (select target)" setting is set for the security model.
  All users are allowed to view files.
- Sub categories
  - If you have applied permissions for a parent folder or a parent subfolder:
    The security model and permissions are set for the selected parent folder or subfolder of the parent.
  - If you do not want to apply permissions for a parent folder or a parent subfolder:
    The security model is set to "REVOKE (select a limit)".
    All users are allowed to view and add files.

For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

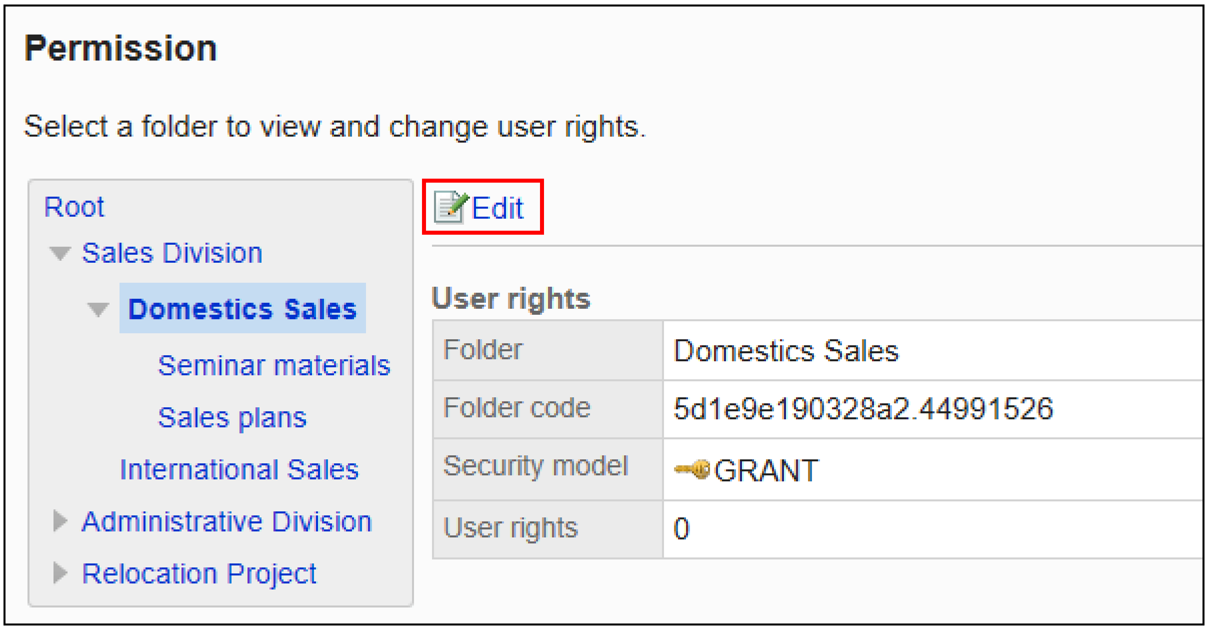
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "Permission".**

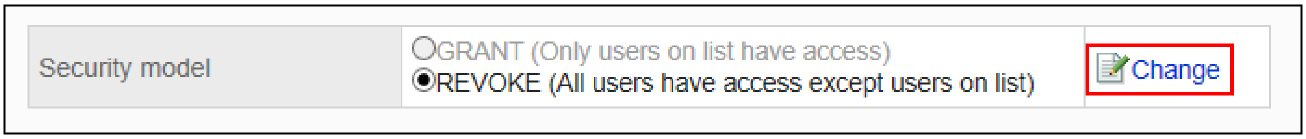
6. **On the "Permission" screen, select a folder and click "Edit".**



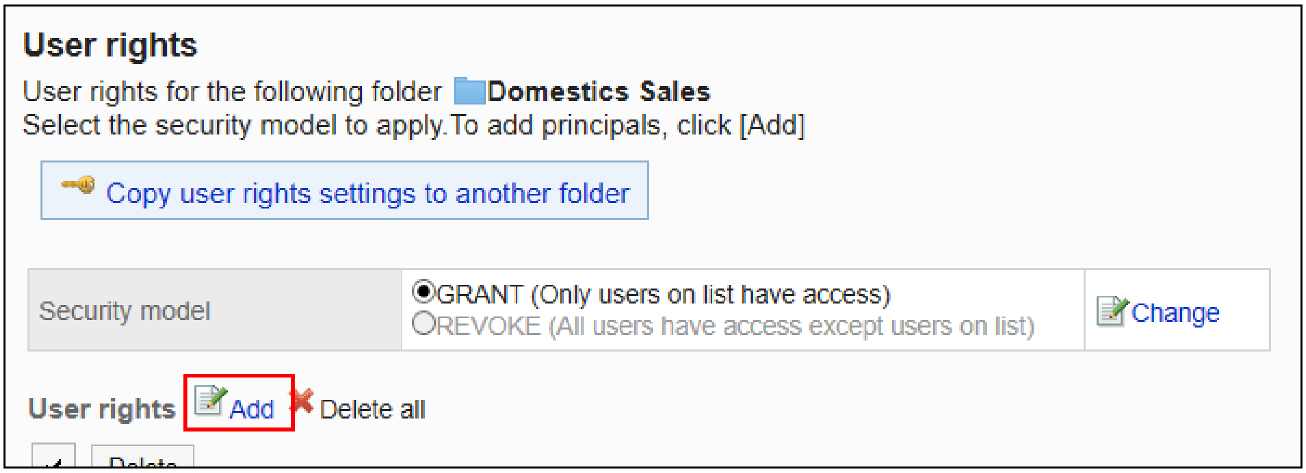
7. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)".

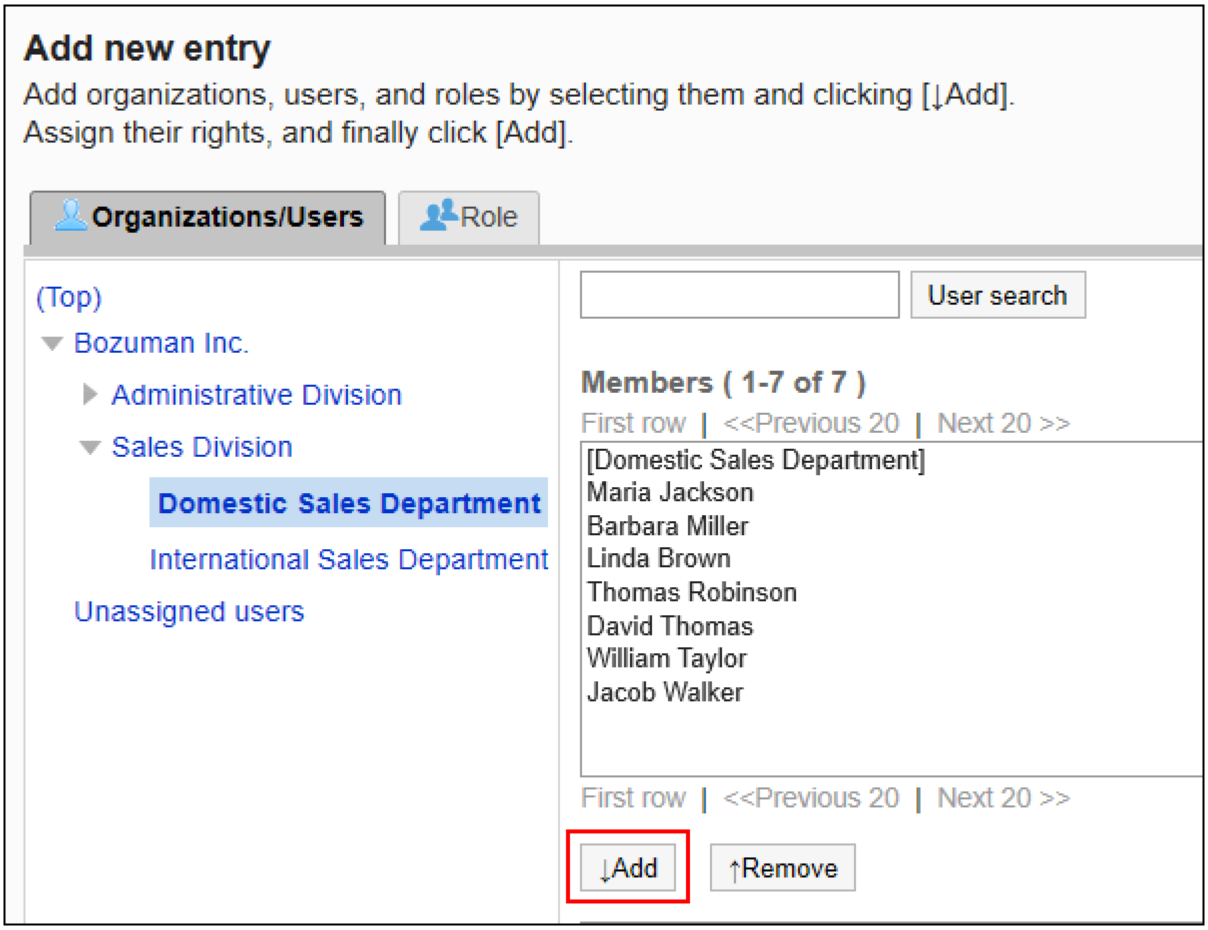
For details, refer to How to change Security model(48Page).



8. **On "User rights" screen, click "Add".**



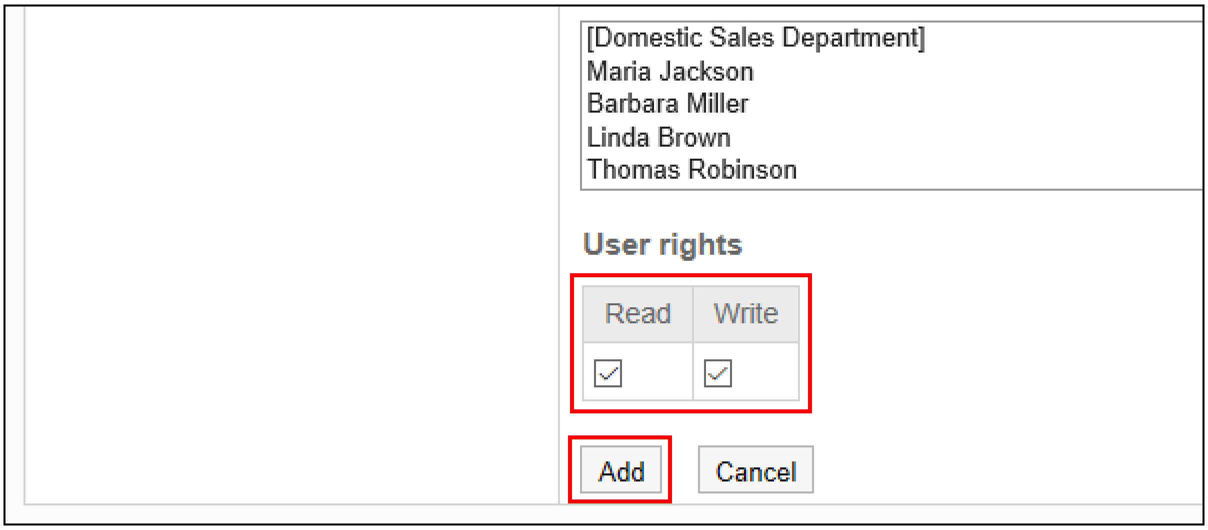
9. On "Add new entry" screen, select the department, user, or role to set permissions, and click "Add".



To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

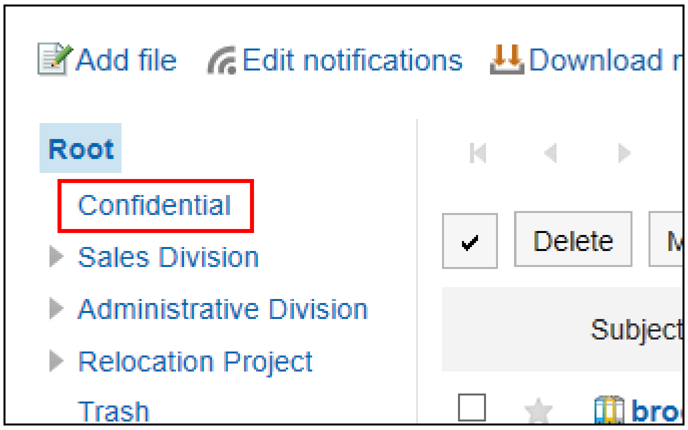
10. Under "User rights", select the check boxes of the permissions to allow, and then click "Add".



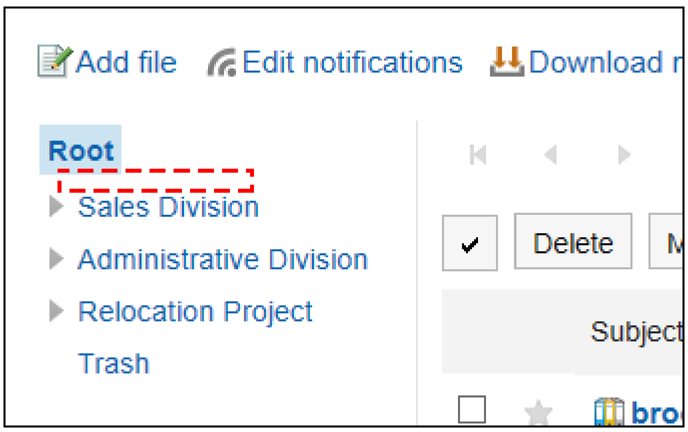
Combination of User Rights

If you restrict the user rights to a file, the only folder that you can manipulate is displayed on the "File management" screen.

Screen showing users who have the user rights:



Screen showing users who do not have the user rights:

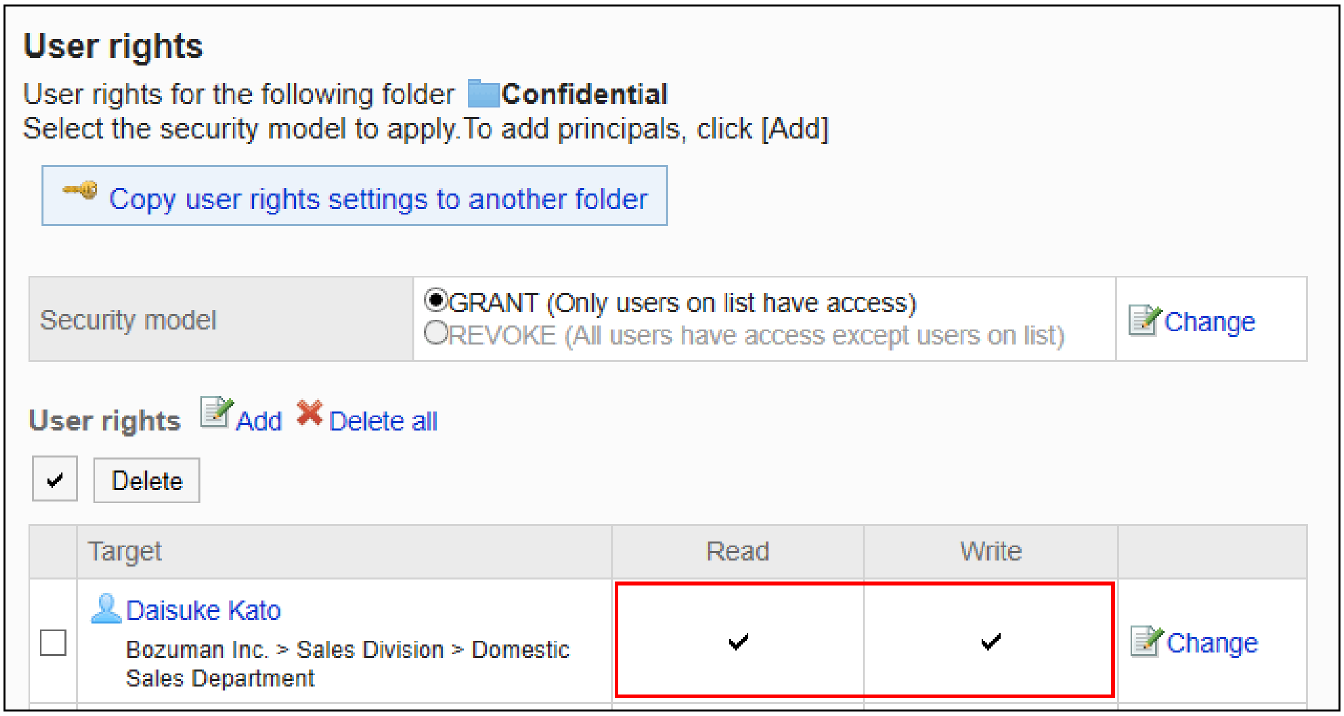


If the security model is "GRANT (Only users on the list have access)"

The security model of permissions for confidential folders is described in the "GRANT (select target)" Example.

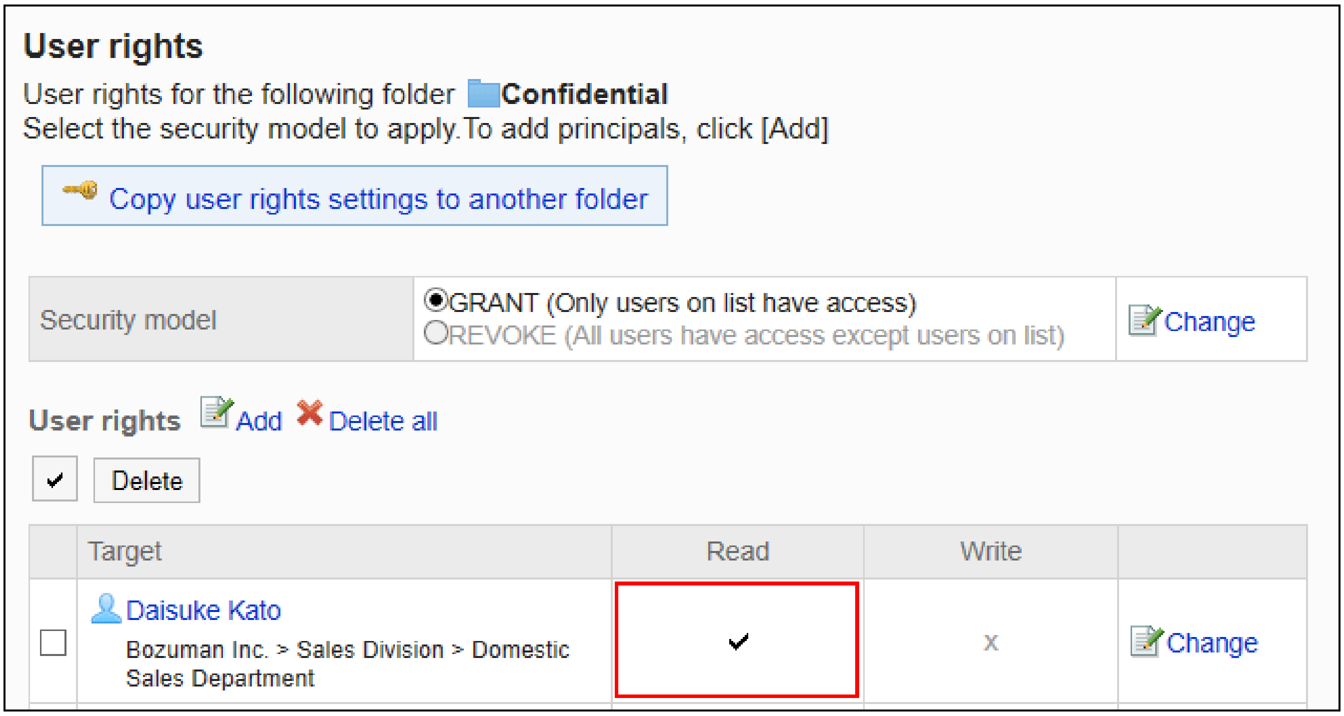
- **Example of allowing Daisuke Kato to perform all the actions on confidential items:**

  Grant Daisuke Kato permission to view and write.



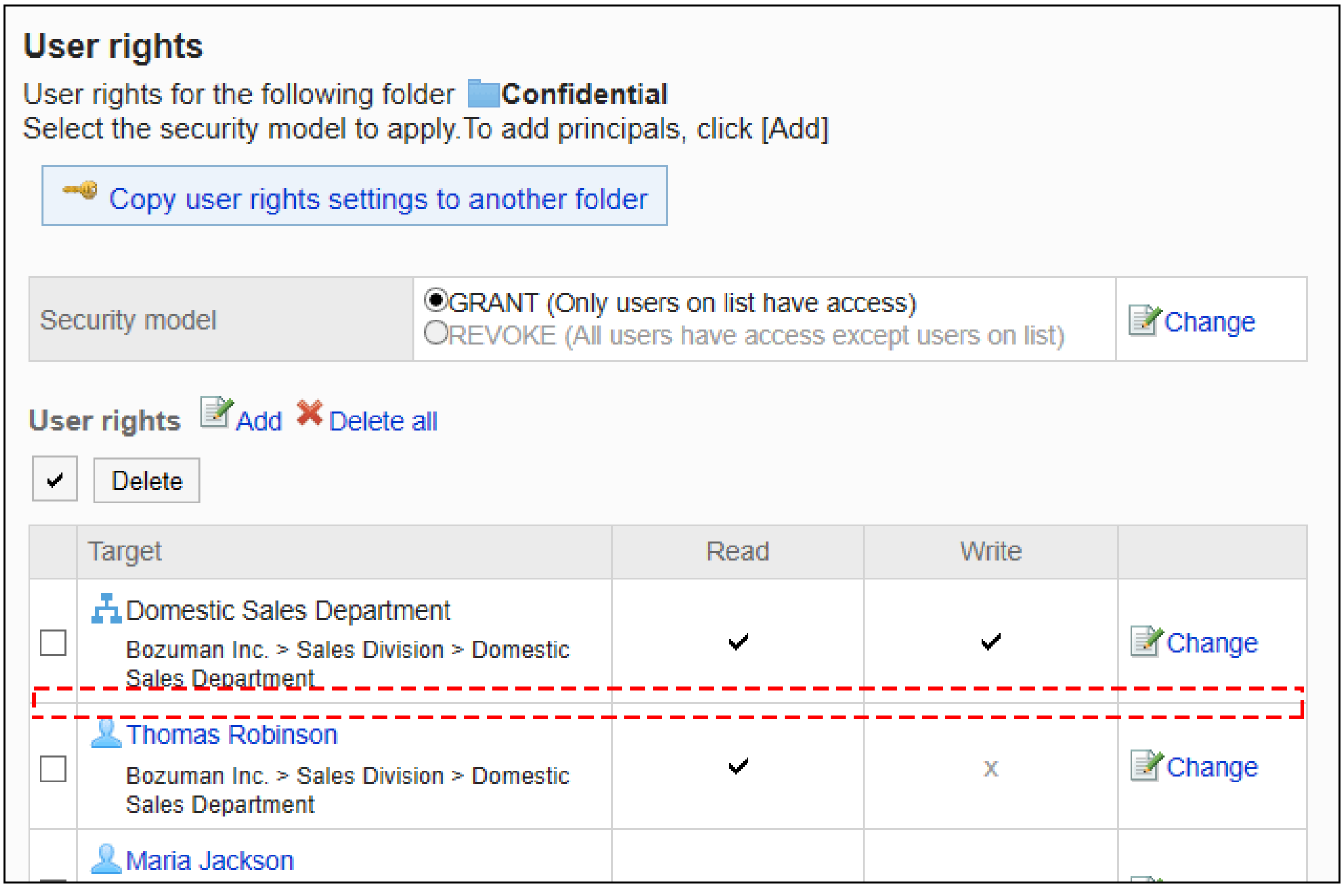
- **Example of Allowing Daisuke Kato to Perform View File Actions Only on Confidential Items:**

  Grant Daisuke Kato a permission to view items.



- **Example of prohibiting Daisuke Kato to perform all the actions on confidential items:**

  Delete Daisuke Kato from the user rights list.

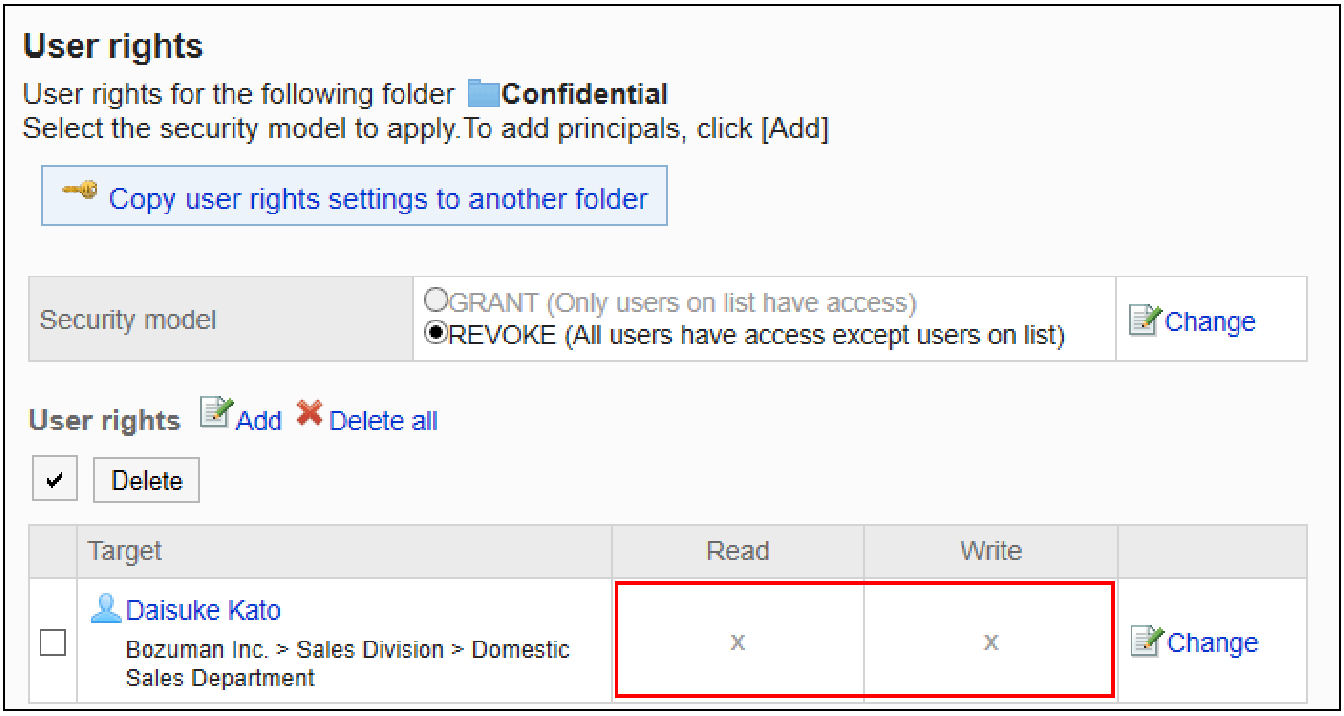


If the security model is "REVOKE (All users have access except users on the list)"

The example shows that the case in which the access permission security model for confidential folders is "REVOKE (All users have access except users on list)".

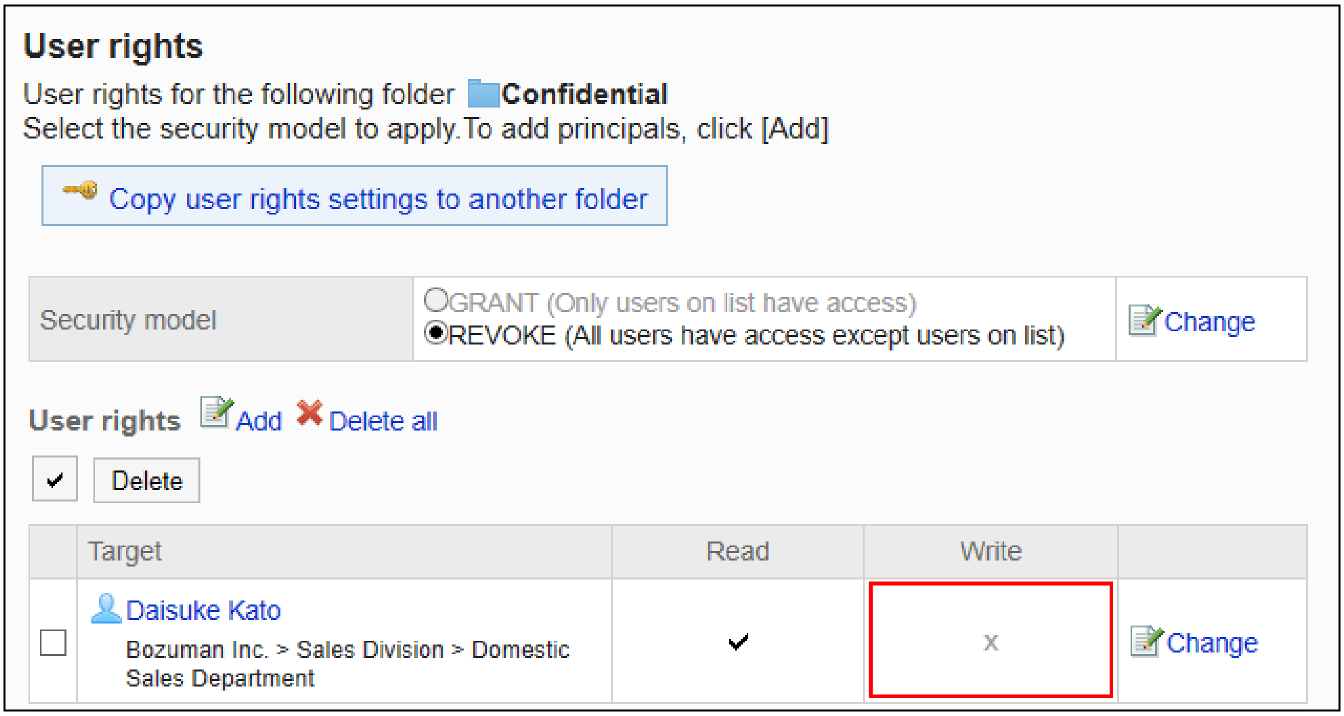
- **Example of prohibiting Daisuke Kato to perform all the actions on confidential items:**

  You can leave the view and write permission from Daisuke Kato.



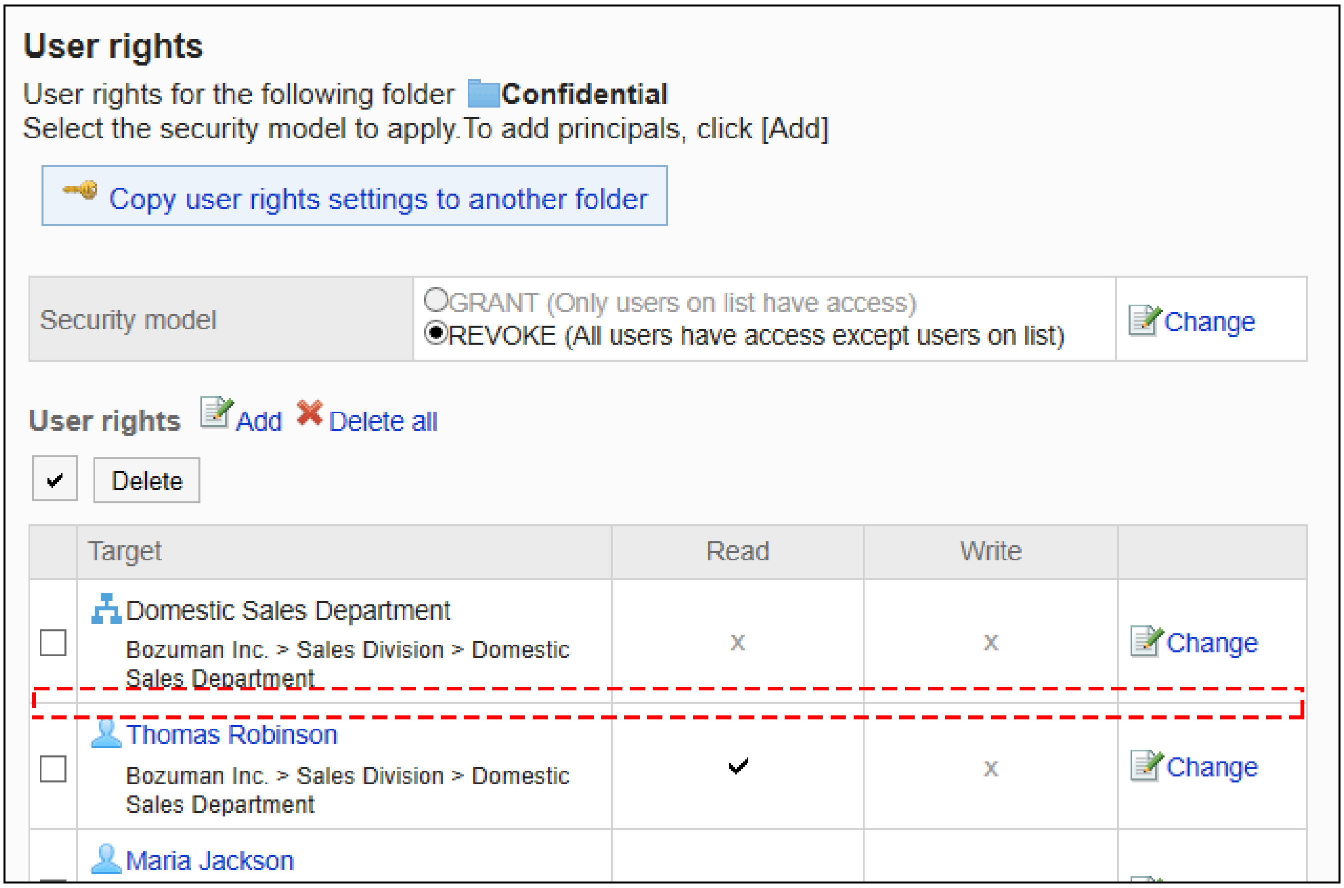
- **Example of Prohibiting Daisuke Kato to Perform Write File Actions on Confidential Items:**

  From Daisuke Kato, you are not allowed to write.



- **Example of allowing Daisuke Kato to perform all the actions on confidential items:**

  Delete Daisuke Kato from the user rights list.

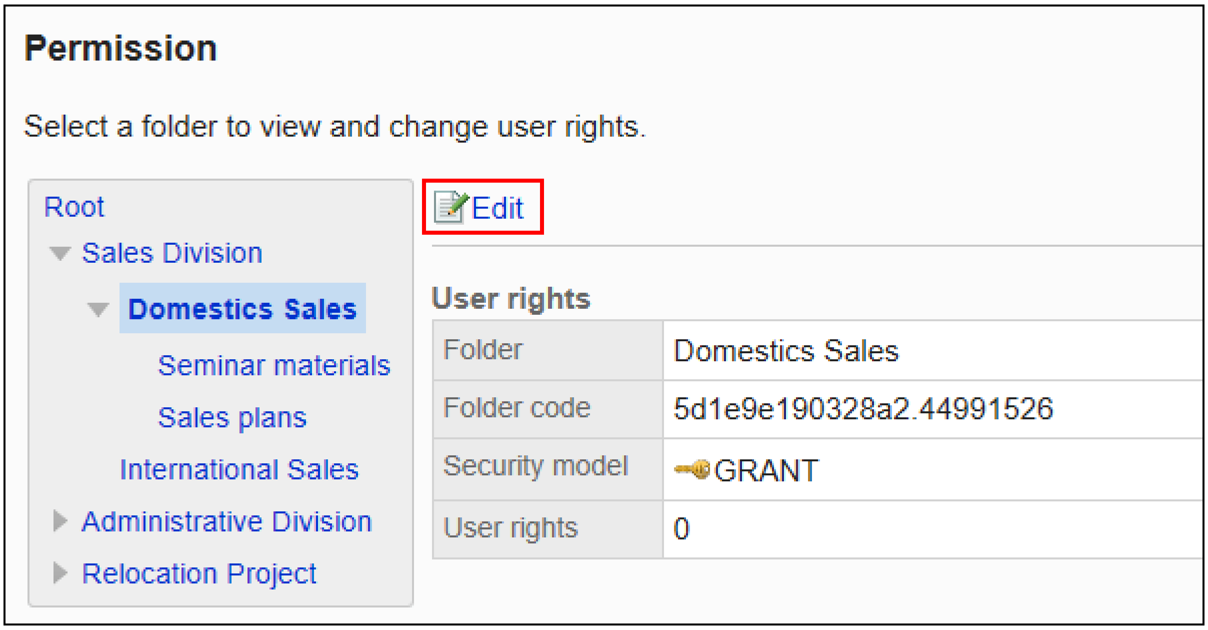


Changing User Rights

Change access permissions granted to users and departments.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Permission".**
6. **On the "Permission" screen, select a folder and click "Edit".**



7. **On the "User Rights List" screen, click "Edit" for the permission you want to change.**

8. **On "Edit user rights" screen, you can change the user rights as needed.**

9. Confirm your settings and click "Save".

Deleting User Rights

Delete access permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

Delete the user rights that you have set.

Steps:

1. Click the administration menu icon (gear icon) in the header.

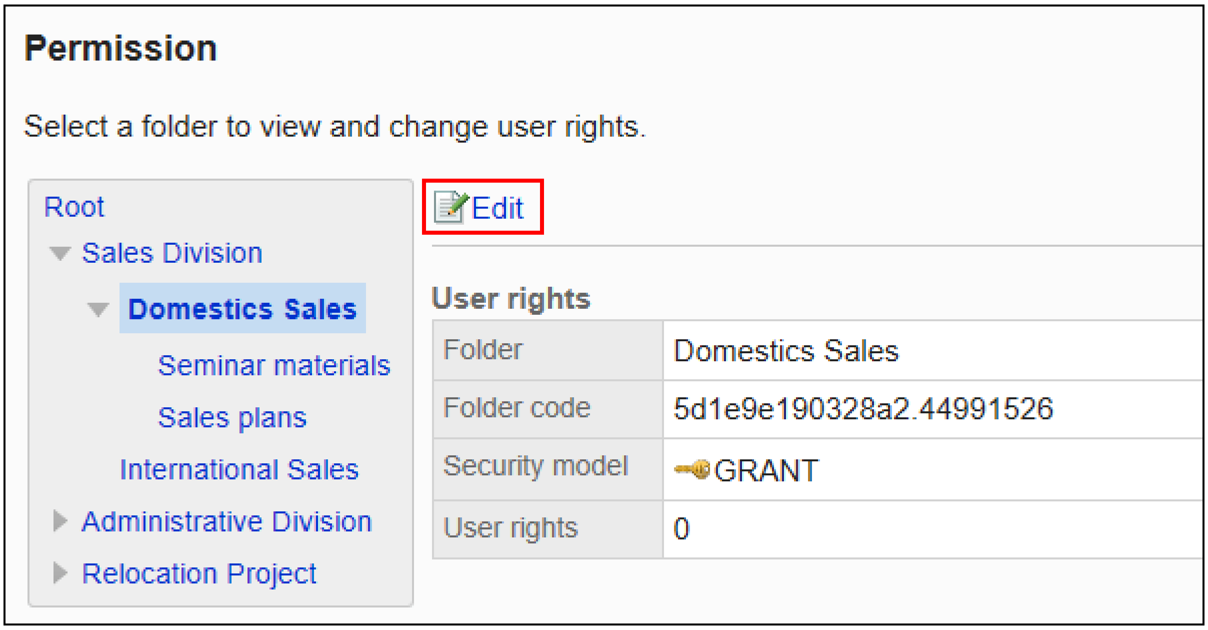
2. Click "System settings".

3. Select "Application settings" tab.

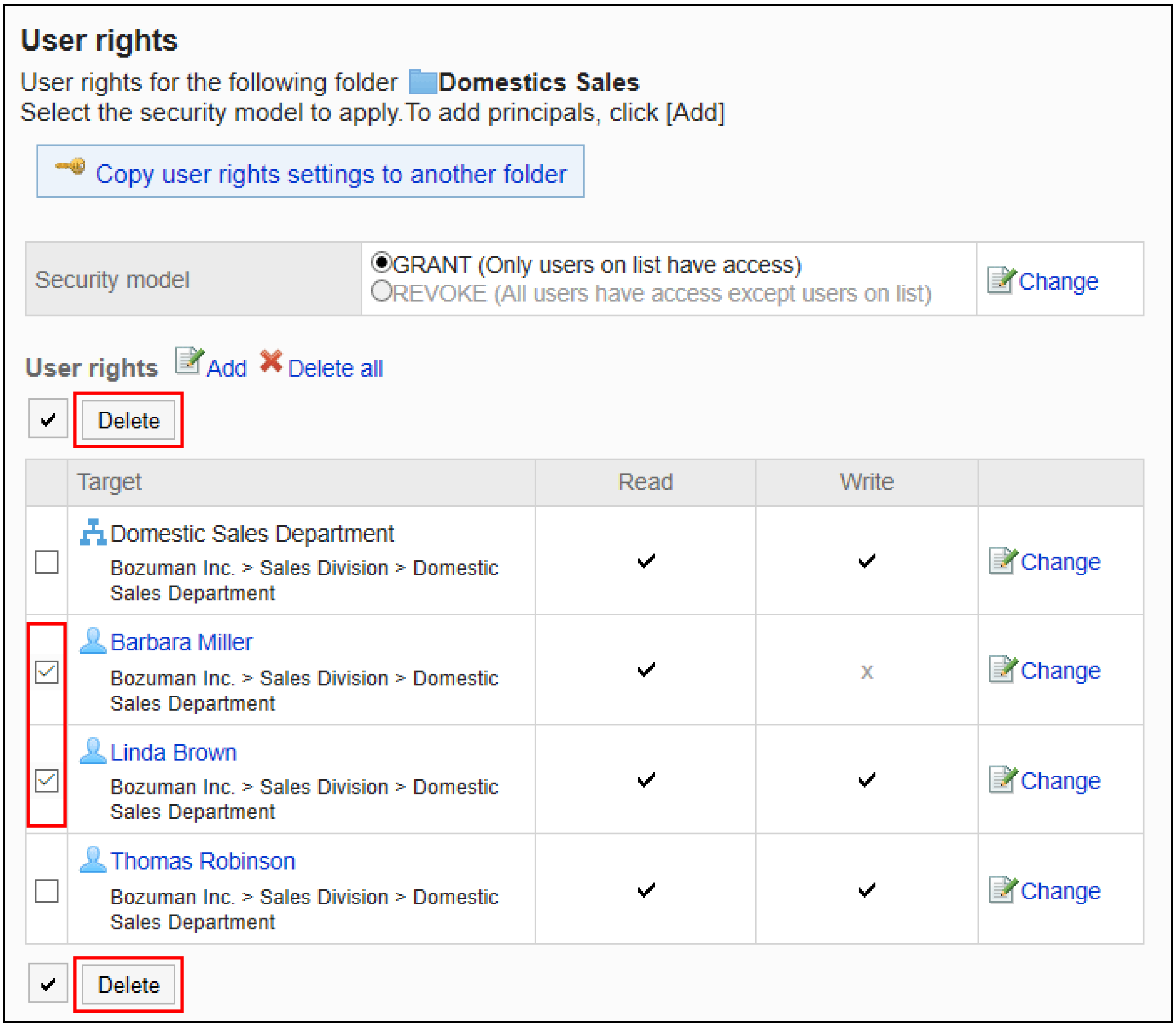
4. Click "Cabinet".

5. Click "Permission".

6. On the "Permission" screen, select a folder and click "Edit".



7. **On "User rights" screen, select the check boxes of the permissions to delete, and then click "Delete".**



8. Click "Yes" on "Delete user rights" screen.

Deleting All User Rights

Delete all user rights.

Steps:

1. Click the administration menu icon (gear icon) in the header.

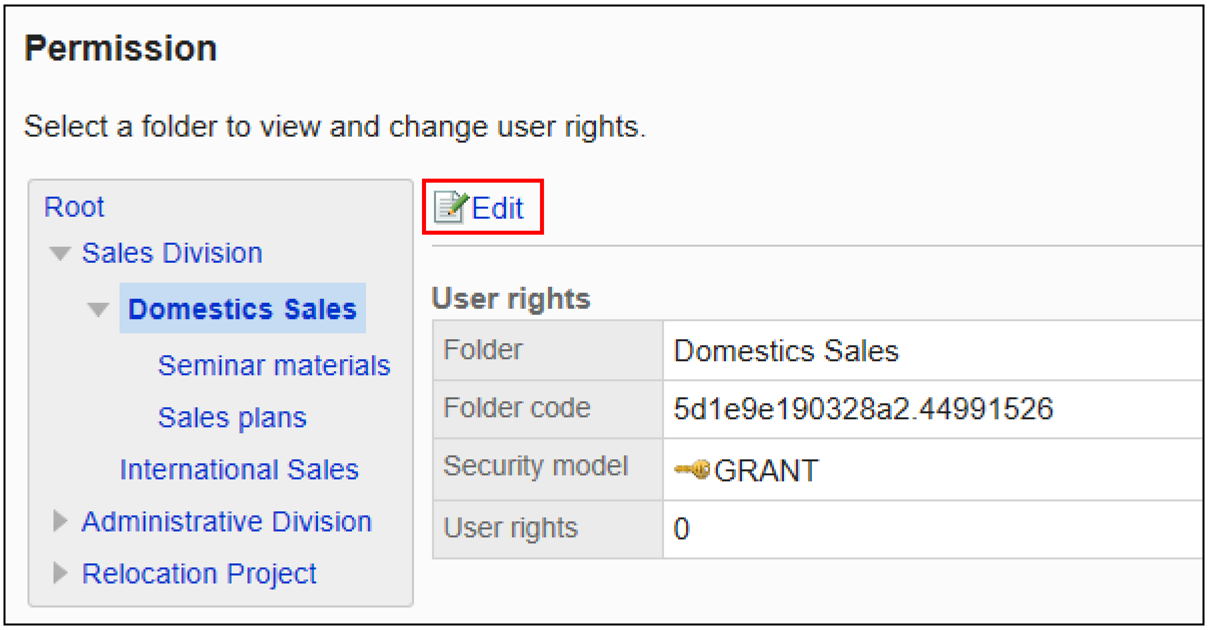
2. Click "System settings".

3. Select "Application settings" tab.

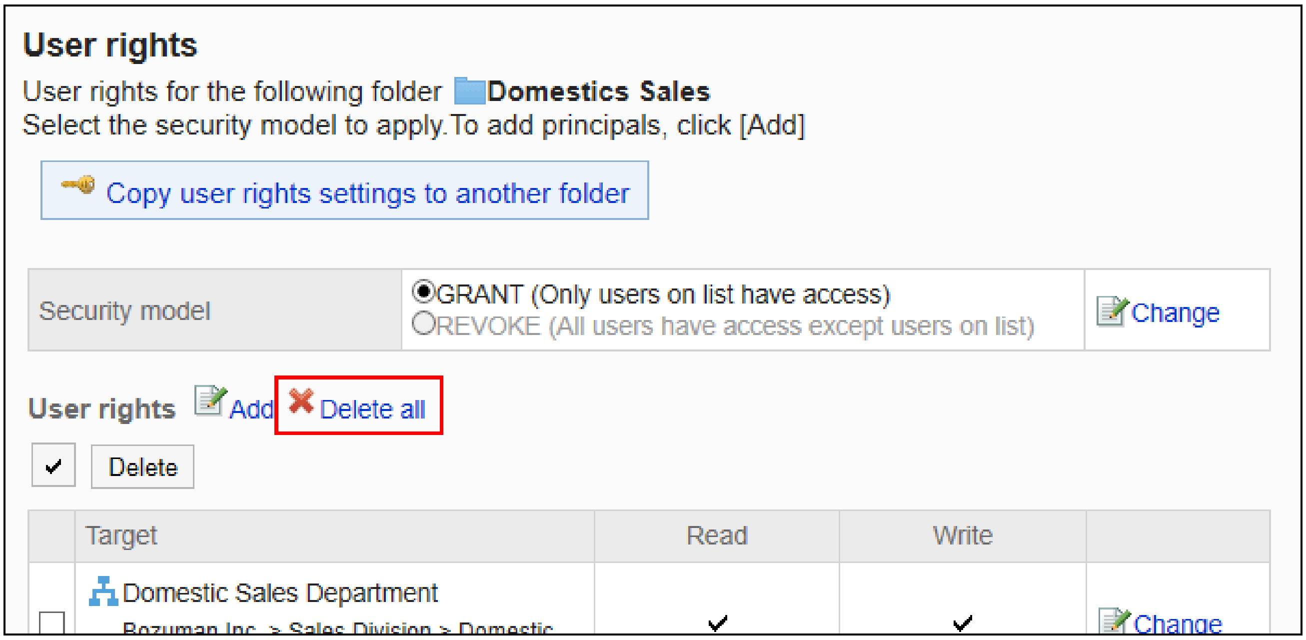
4. Click "Cabinet".

5. Click "Permission".

6. On the "Permission" screen, select a folder and click "Edit".



7. On "User rights" screen, click "Delete all".



8. Click "Yes" on "Delete all user rights" screen.

Applying User Rights to Other Folders

Copy the permissions of the folder and apply it to other folders.

The user rights settings in the destination folder are overwritten in the source settings.

The permissions settings for other folders cannot be applied to the root.

If you change the settings in the source folder after you have applied permissions settings for other folders, the destination folder does not appear.

Steps:

1. Click the administration menu icon (gear icon) in the header.

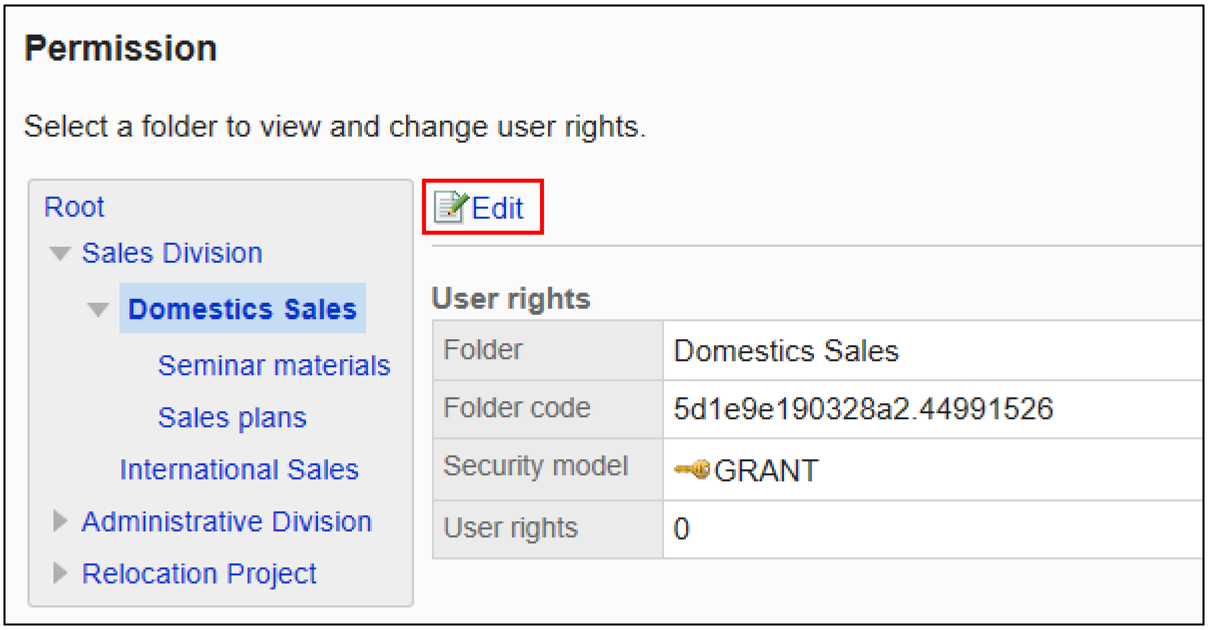
2. Click "System settings".

3. Select "Application settings" tab.

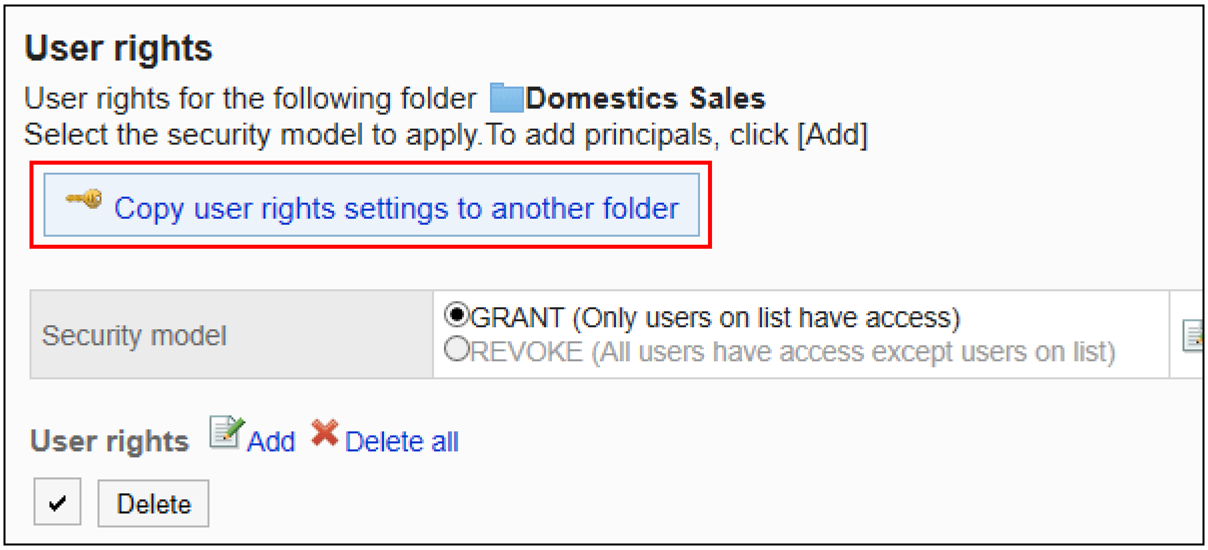
4. Click "Cabinet".

5. Click "Permission".

6. On the "Permission" screen, select the folder where you want to copy the permissions, and then click "Save".

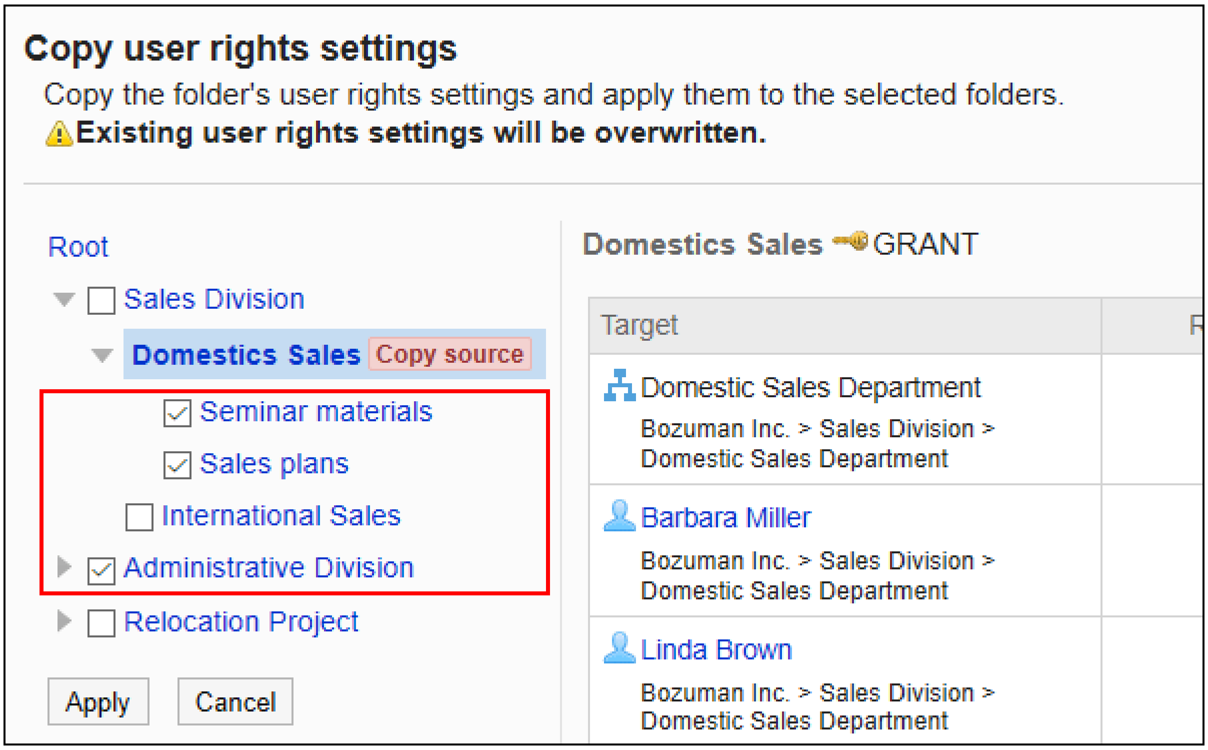


7. **On the "User Rights List" screen, click "Apply permissions to other folders".**



8. **On the "Apply Permissions in bulk" screen, select the check box for the folder where you want to apply the permissions.**

You can cancel all folder selections by clicking "Root".



9. Confirm your settings and click "Apply".

2.7.5. Setting Notifications

Describes how to set update notifications for folders.

You can set up organizations, users, or roles.

Note

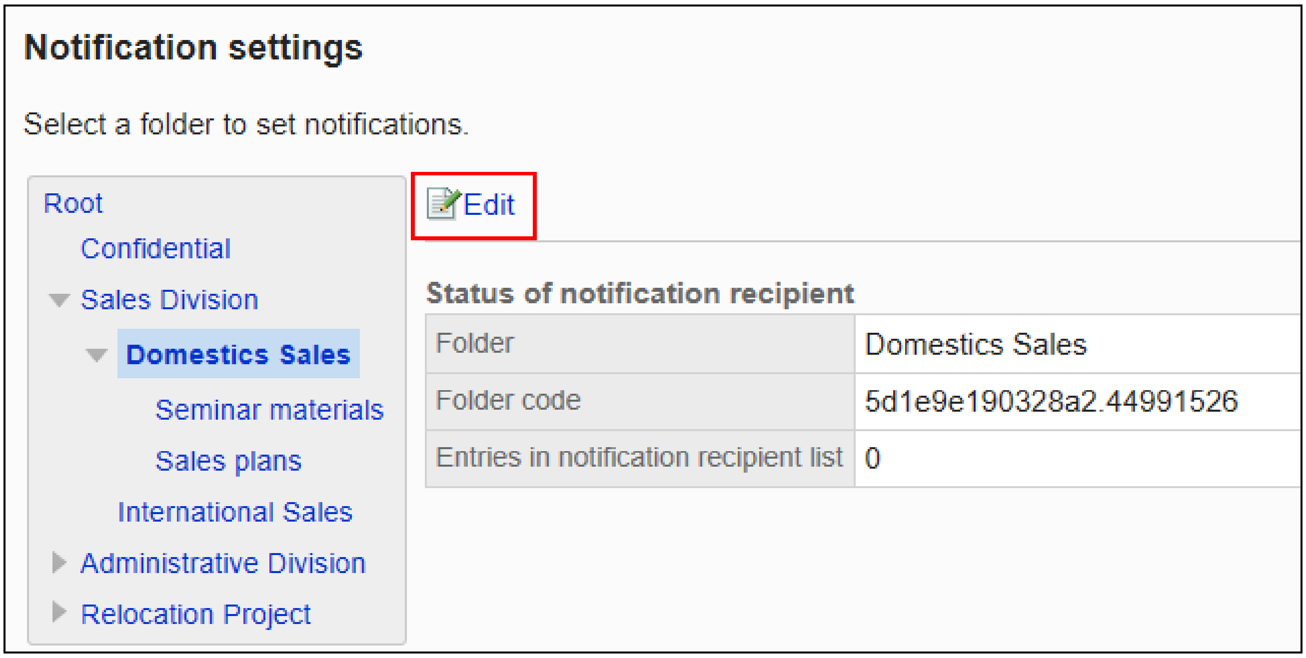
- Notifications are not sent to the notification recipients if the notification recipients do not have the permissions to view the folder.

Adding Notification Recipients

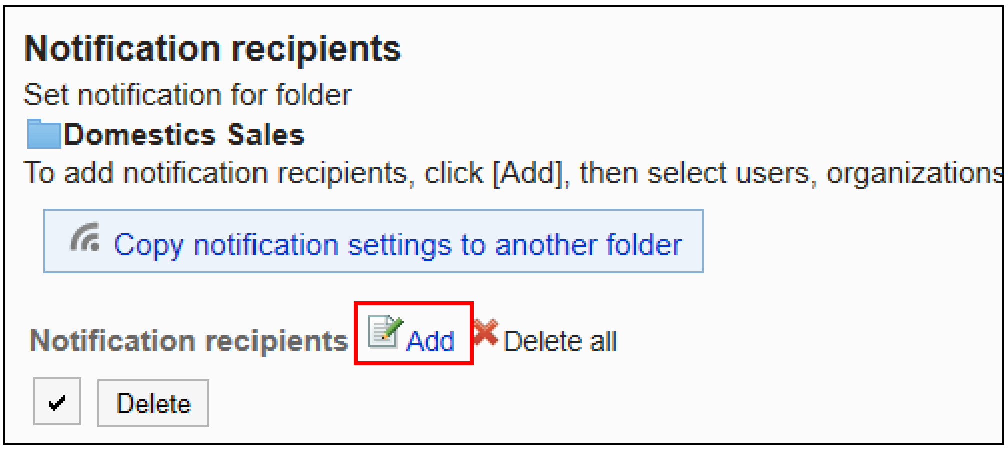
For each folder, set the notification recipients for the update notifications.

Steps:

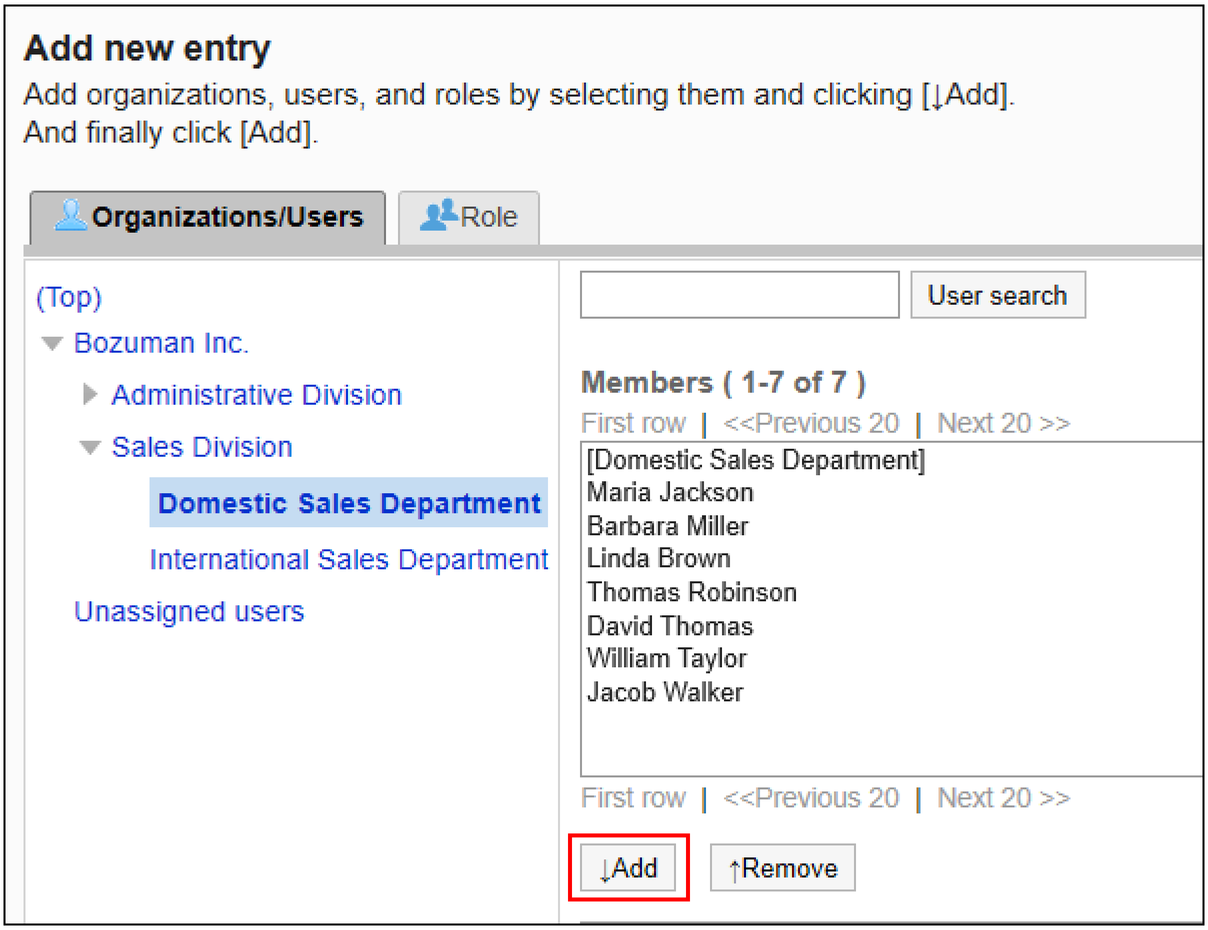
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Notification settings".**
6. **On the "Notification settings" screen, select a folder and click "Save".**



7. **On the "Notification recipients" screen, click "Add".**



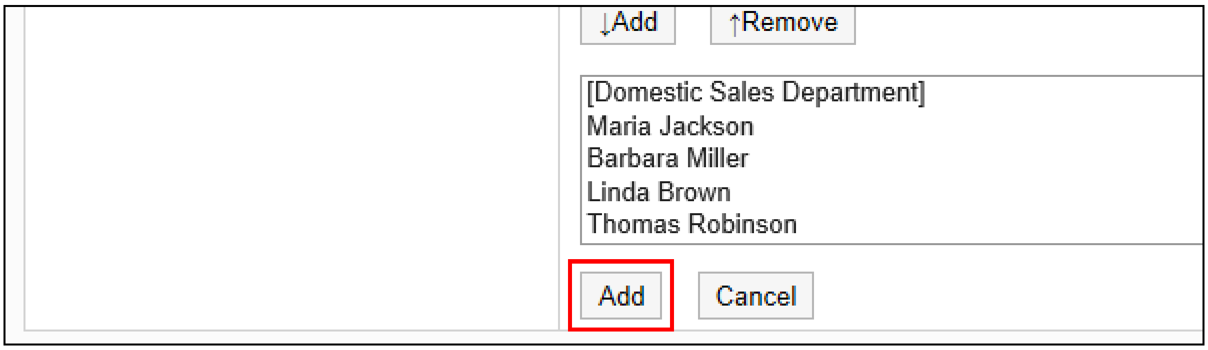
8. **On the screen to add recipients, select the department, user, or role to set notifications, and then click "Add".**



To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

9. **Confirm your settings and click "Add".**



Deleting Notification Recipients

Delete the notification recipients that you have set for the folder.

Caution

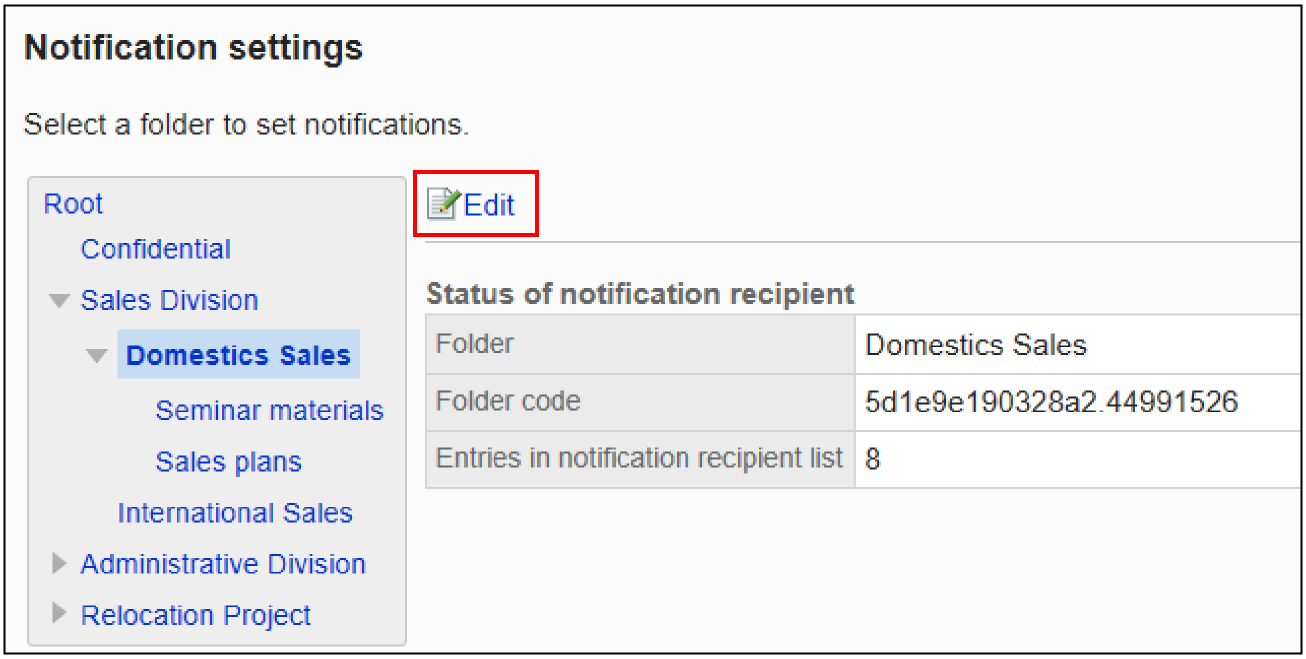
- Once you delete notification recipients, they cannot be restored.

Selecting and Deleting Notification Recipients

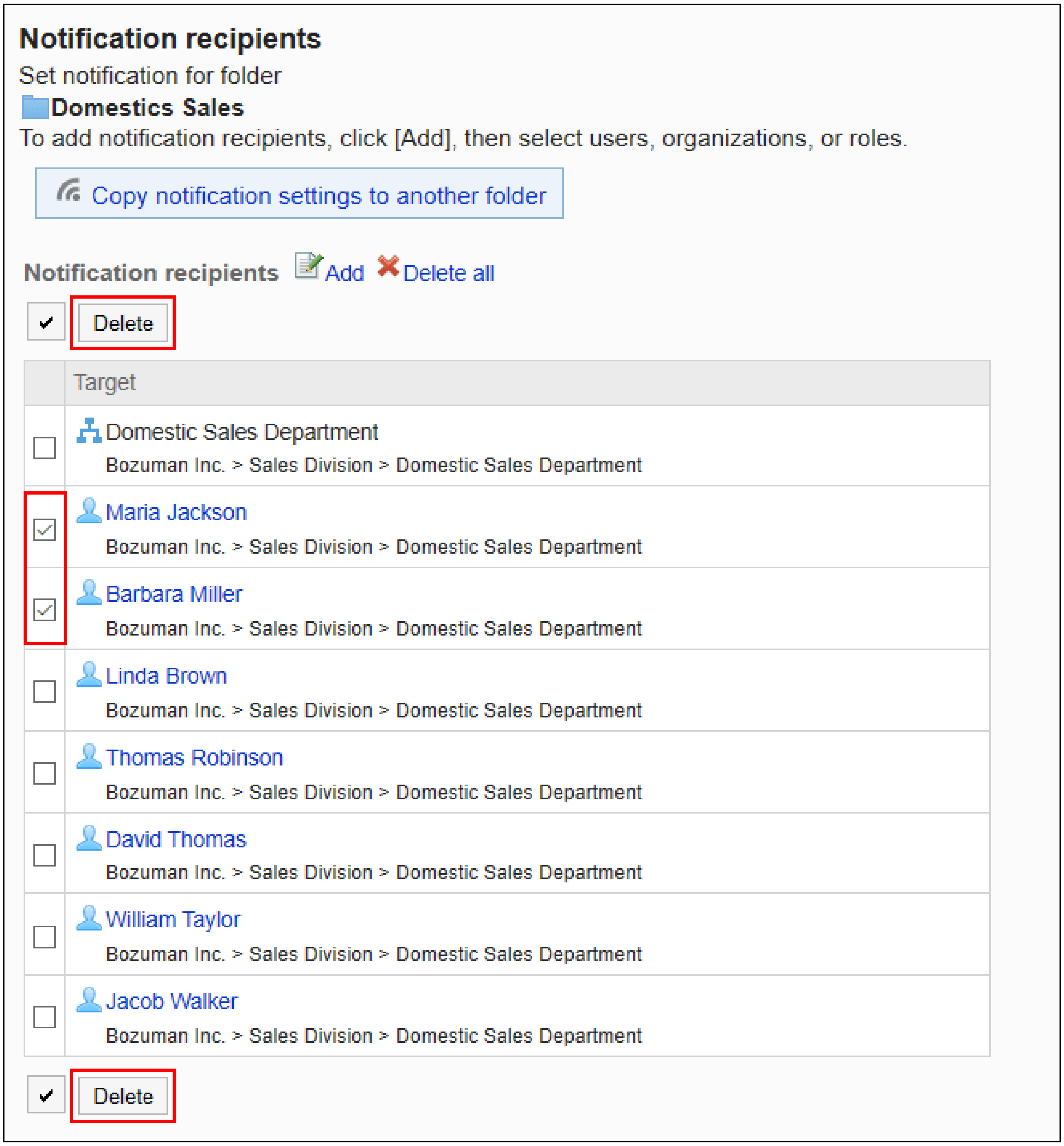
Select notification recipients and delete them.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Notification settings".**
6. **On the "Notification settings" screen, select a folder and click "Save".**



7. **On the screen for notification recipients, select the check boxes of the recipients to delete, and then click "Delete".**



8. Click "Yes" on the screen to delete all recipients.

Deleting All Notification Recipients

Delete all of the specified notification recipients.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

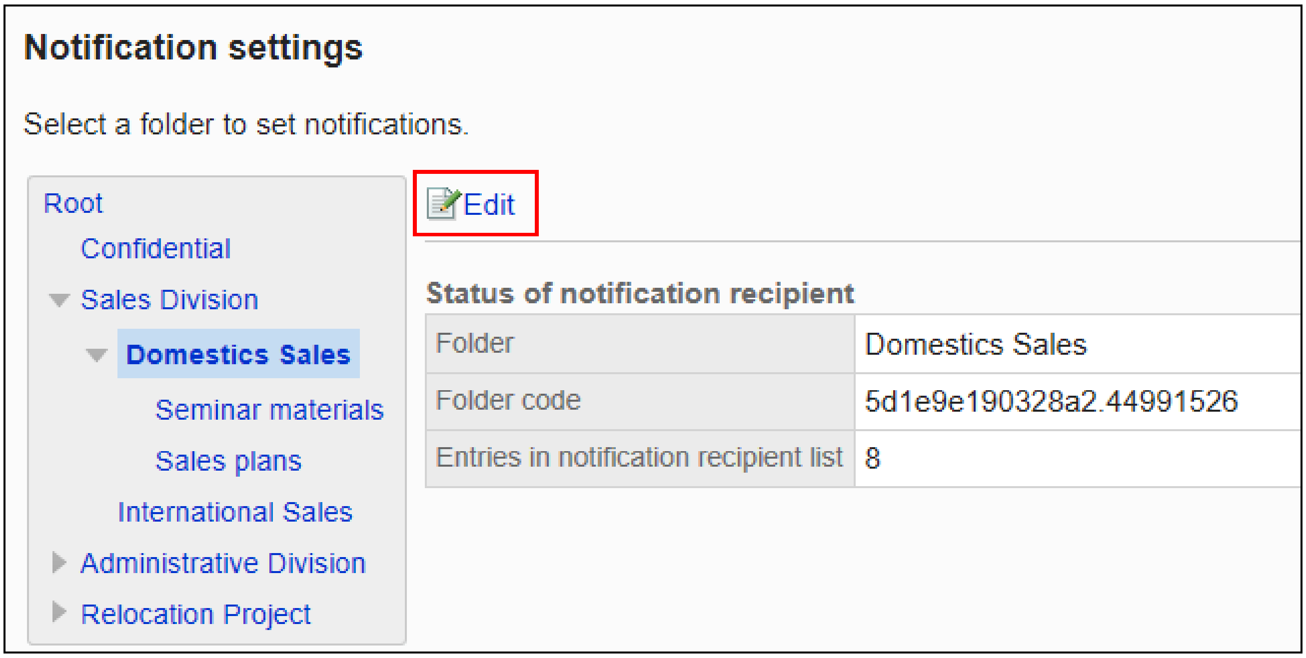
2. **Click "System settings".**

3. **Select "Application settings" tab.**

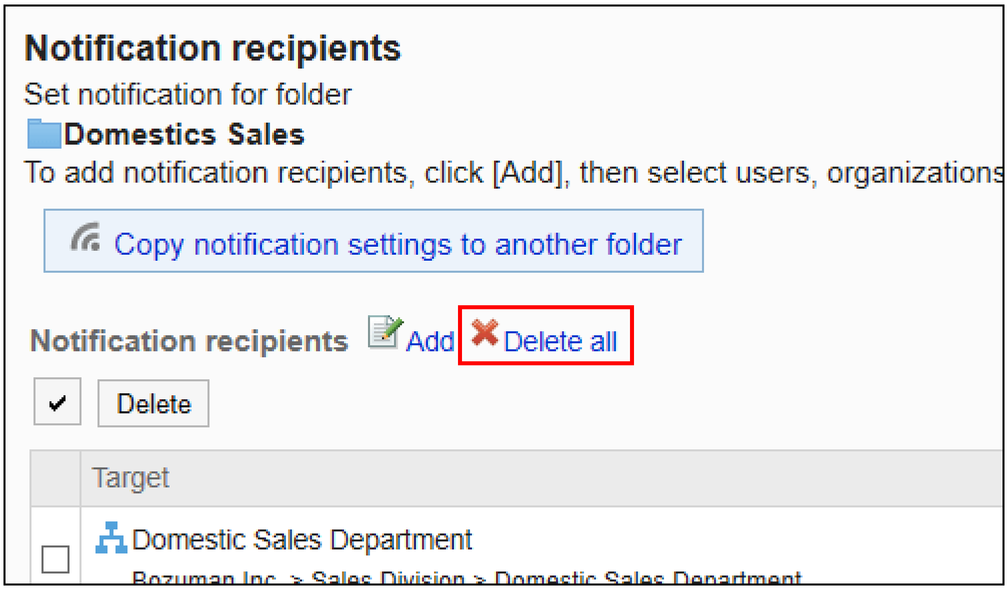
4. **Click "Cabinet".**

5. **Click "Notification settings".**

6. **On the "Notification settings" screen, select a folder and click "Save".**



7. **On the "Notification recipients" screen, click "Delete all".**



8. **Click "Yes" on the screen to delete all notification recipients.**

Applying Notification Settings to Other Folders

Copy the folder notification settings and apply them to other folders.

The notification settings in the destination folder are overwritten in the source settings.

Notification settings for other folders cannot be applied to the root.

If you change the settings of the source folder after applying notification settings for other folders, the destination folder does not appear.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

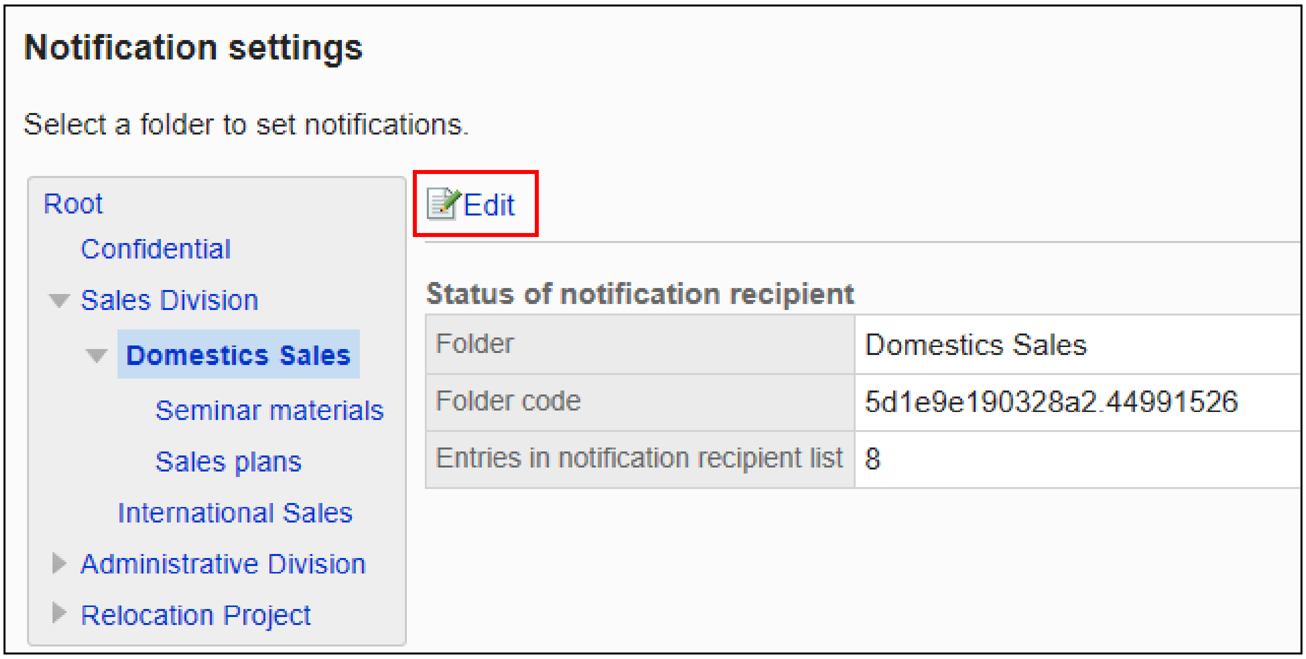
2. **Click "System settings".**

3. **Select "Application settings" tab.**

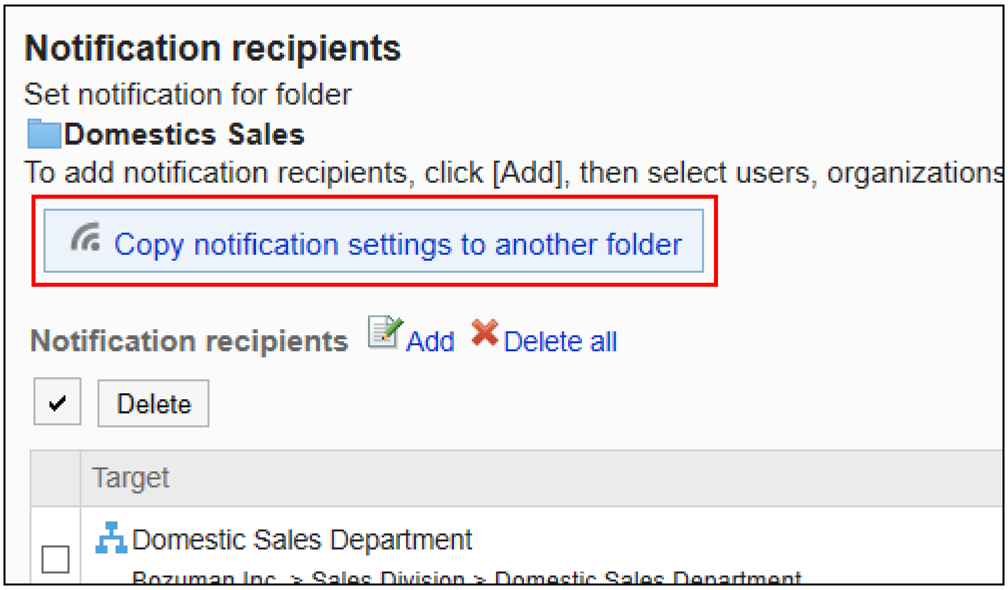
4. **Click "Cabinet".**

5. **Click "Notification settings".**

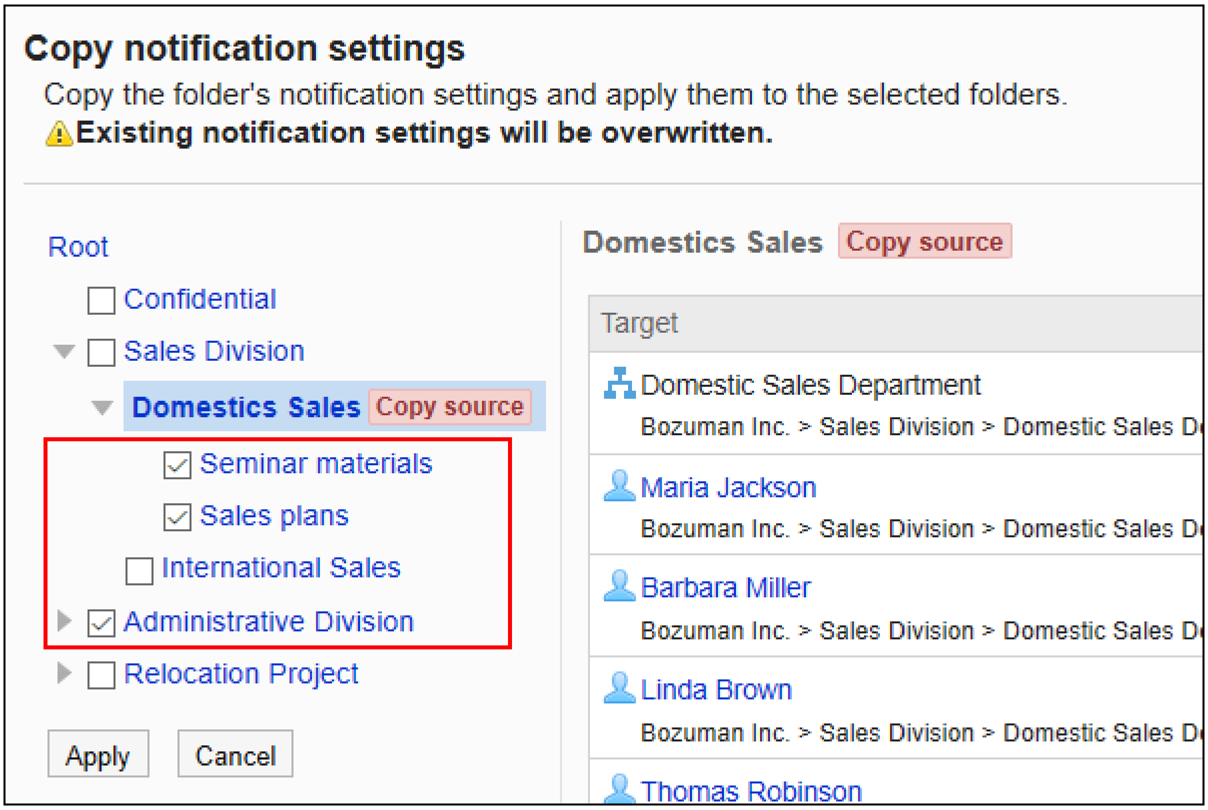
6. **On the "Notification settings" screen, select the folder where you want to copy the notification settings, and then click "Save".**



7. **On the "Notification recipients" screen, click "Apply notification settings to other folders".**



8. **On the "Apply Notification Settings" screen, select the check box of the folder for which you want to apply notification settings, and then click "Apply".**



You can cancel all folder selections by clicking "Root".

9. **Click "Yes" on the "Apply Notifications Settings" screen.**

2.7.6. Managing Files

This section describes how to manage files on the System administration page.

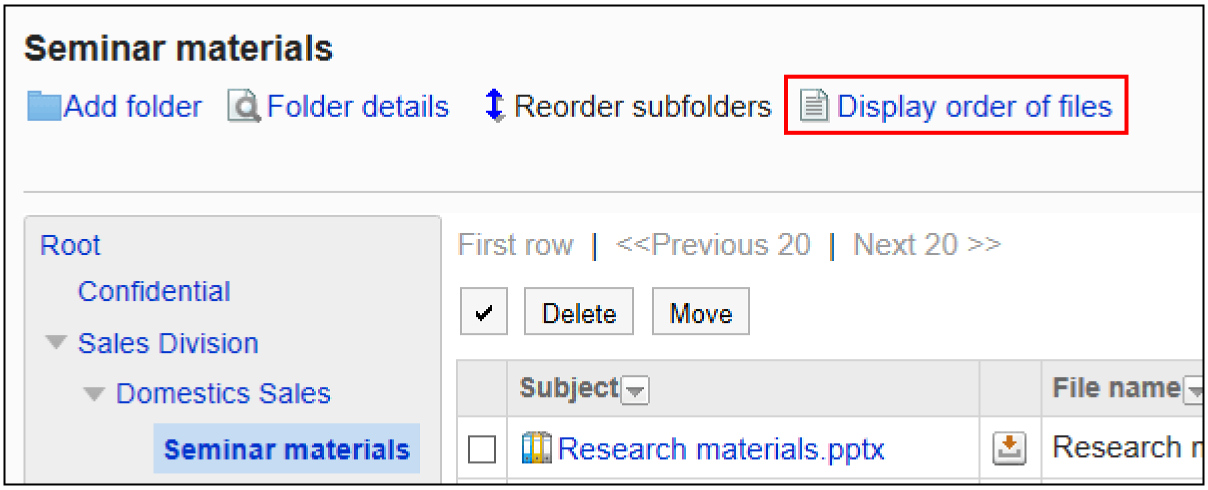
Changing Default File Order

When you select a folder, you can set the default value of the display order of the displayed files.

If a user sorts by title, file name, and so on, the default value does not change if the order of files is changed.

Steps:

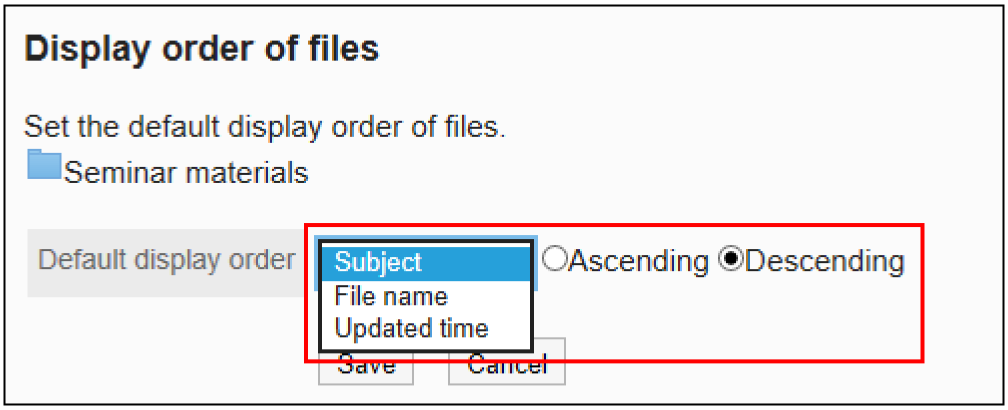
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Folder Settings".**
6. **On the "Folder Settings" screen, select a folder and click "Show Files".**



7. **On the "Display order" screen, set the "Default display order" field.**

   Select one of the following default values, and then select "Ascending" or "descending".

   - Subject
   - File name
   - Updated



8. **Confirm your settings and click "Save".**

Moving Files

Move the file to another folder.
When a file is moved to a folder where update notifications are set, an update notification is sent to the notification recipients.

Moving Files One by One

Move one file to another folder.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

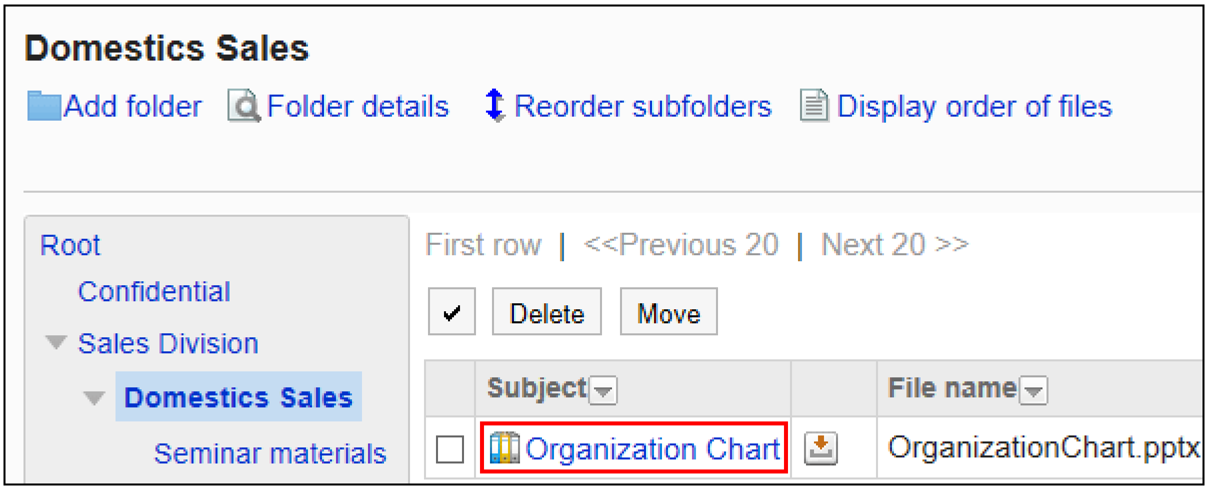
2. **Click "System settings".**

3. **Select "Application settings" tab.**

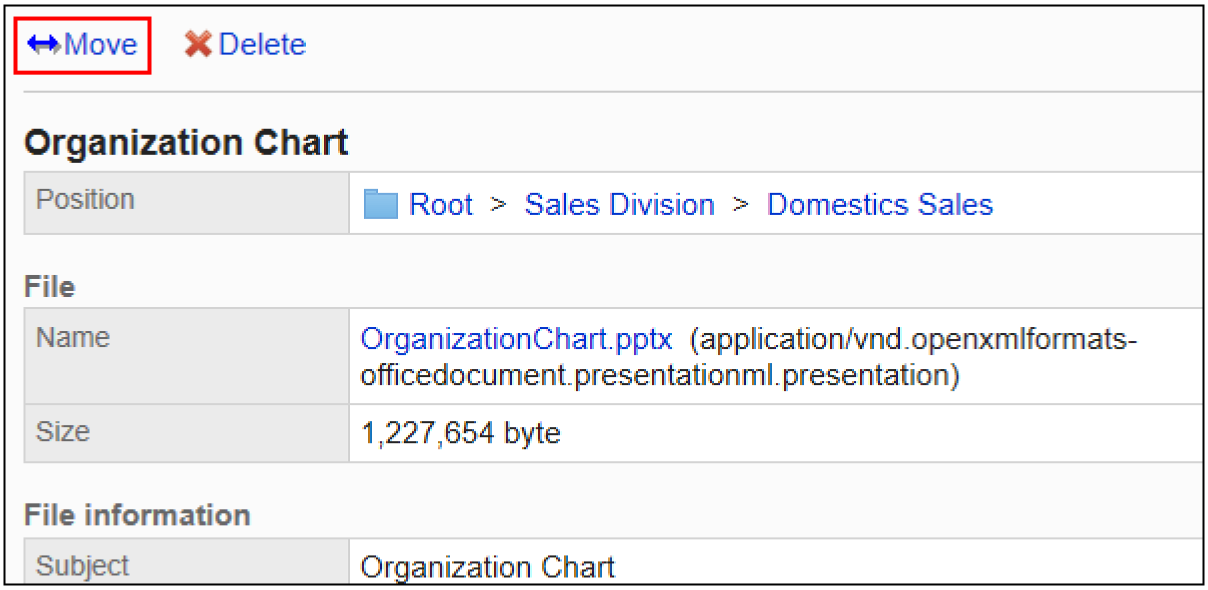
4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select a folder and click the title of the file you want to move.**



7. **On the "File Details" screen, click "Move Files".**

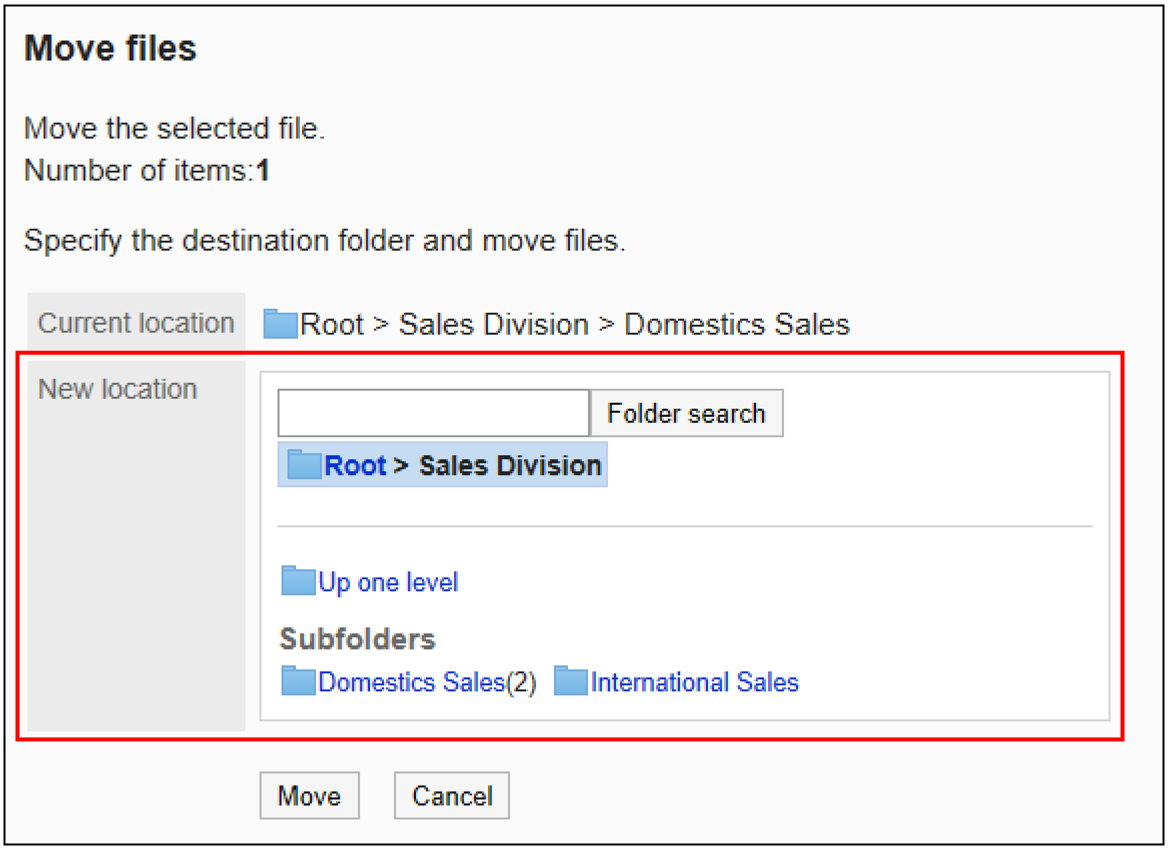


8. **In the "Move Folder" field on the "Move Files" screen, select the folder that you want to move.**

You can search the destination folder by entering keywords and clicking Search Folder.

Clicking "Up one" moves the folder up one.

Clicking a folder name moves it to the subfolder you clicked. Numbers represent the number of subfolders.



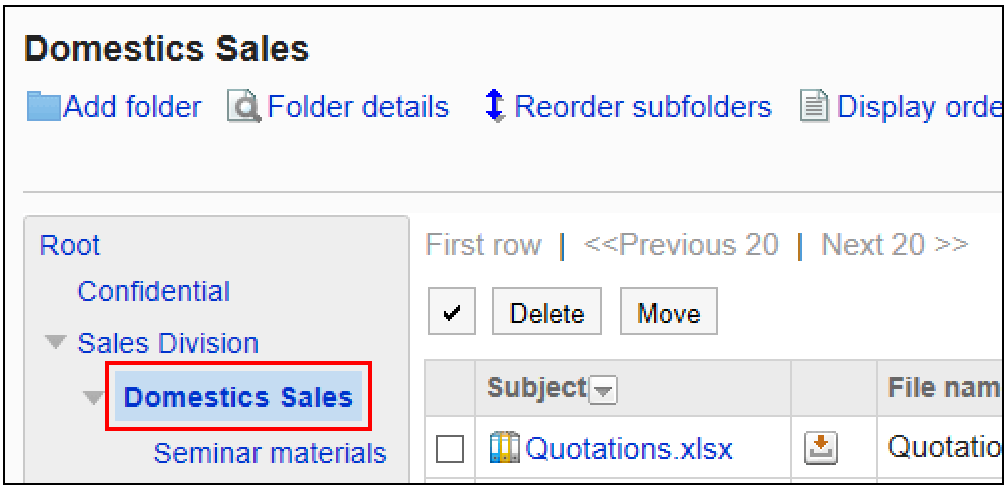
9. **Confirm your settings and click "Move".**

Moving Multiple Files Together

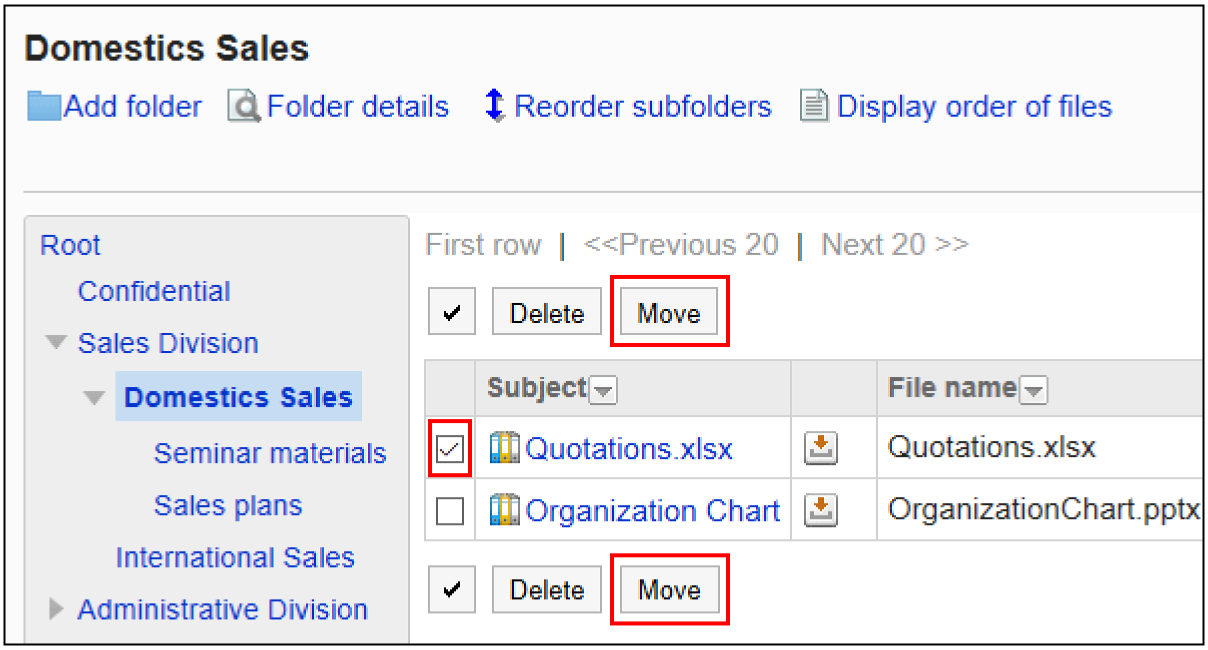
Move multiple files to another folder.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cabinet".**
5. **Click "Folder Settings".**
6. **On the "Folder Settings" screen, select a folder.**



7. **Select the check boxes of the files you want to move, and click "Move".**

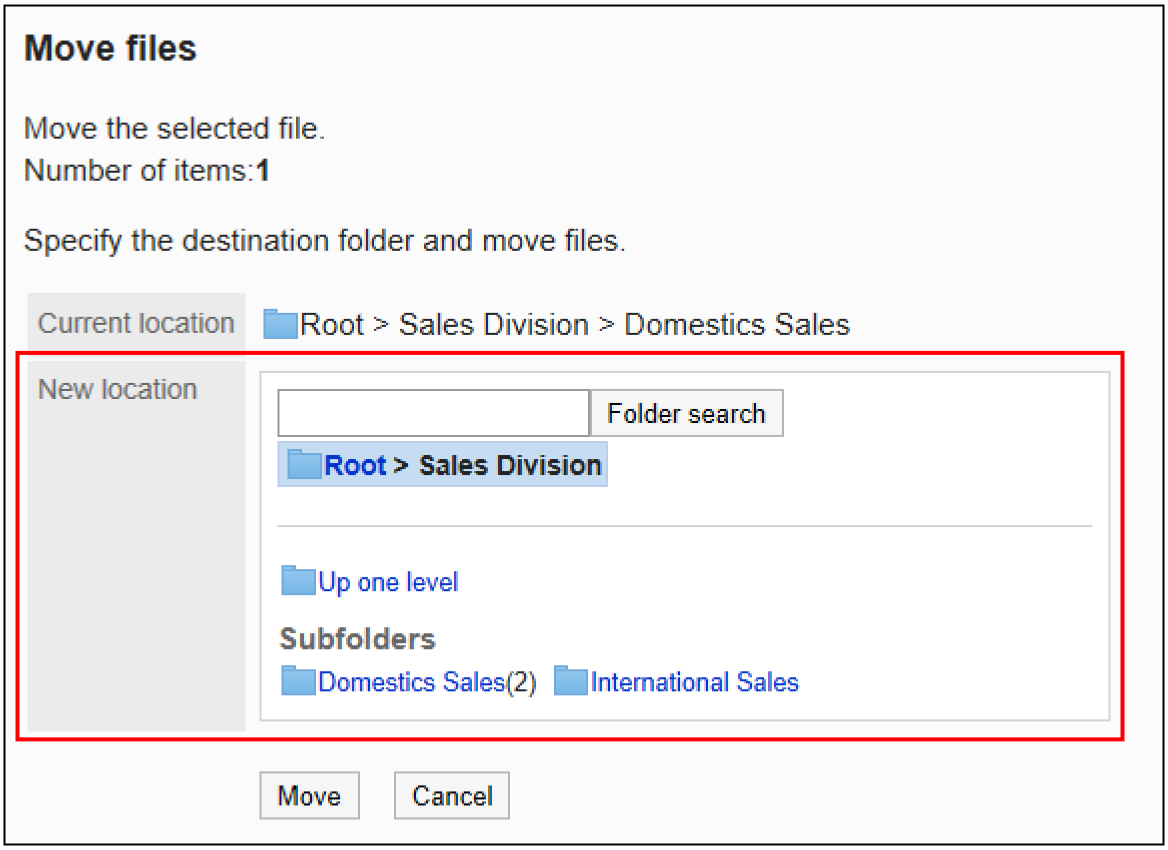


8. **In the "Changed folder" field on the "Move Files" screen, select the folder that you want to move.**

You can search the destination folder by entering keywords and clicking Search Folder.

Clicking "Up one" moves the folder up one.

Clicking a folder name moves it to the subfolder you clicked. Numbers represent the number of subfolders.



9. **Confirm your settings and click "Move".**

Deleting Files

Delete the file.

The deleted file is moved to trash. The "trash" file will be saved for the specified period.

For details on setting the "Recycle Bin" retention period, refer to General settings for files(1016Page).

Caution

- If you delete a file in trash, it will be permanently deleted and cannot be restored.

Deleting Files One by One

Delete each file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

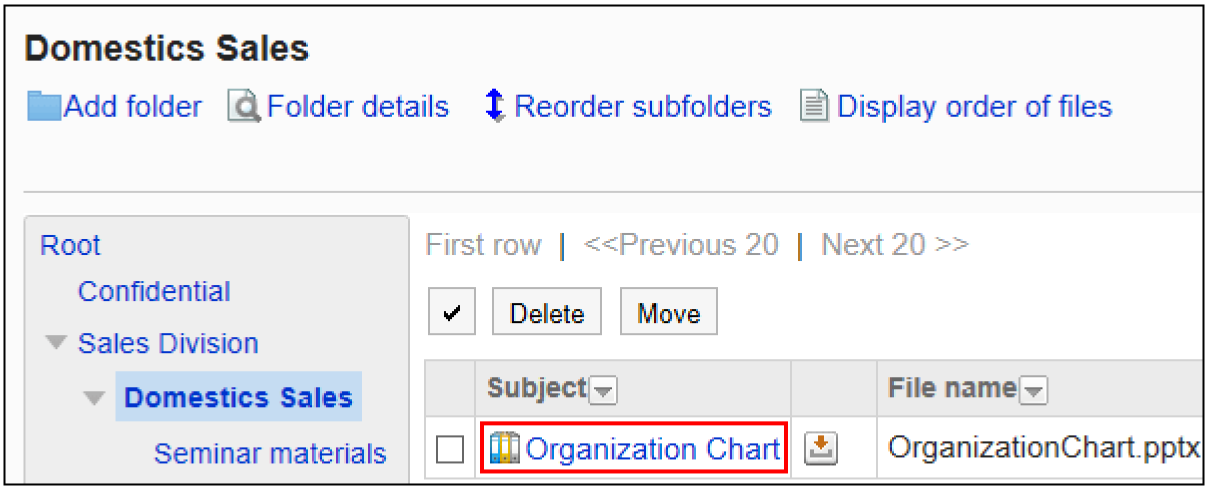
2. **Click "System settings".**

3. **Select "Application settings" tab.**

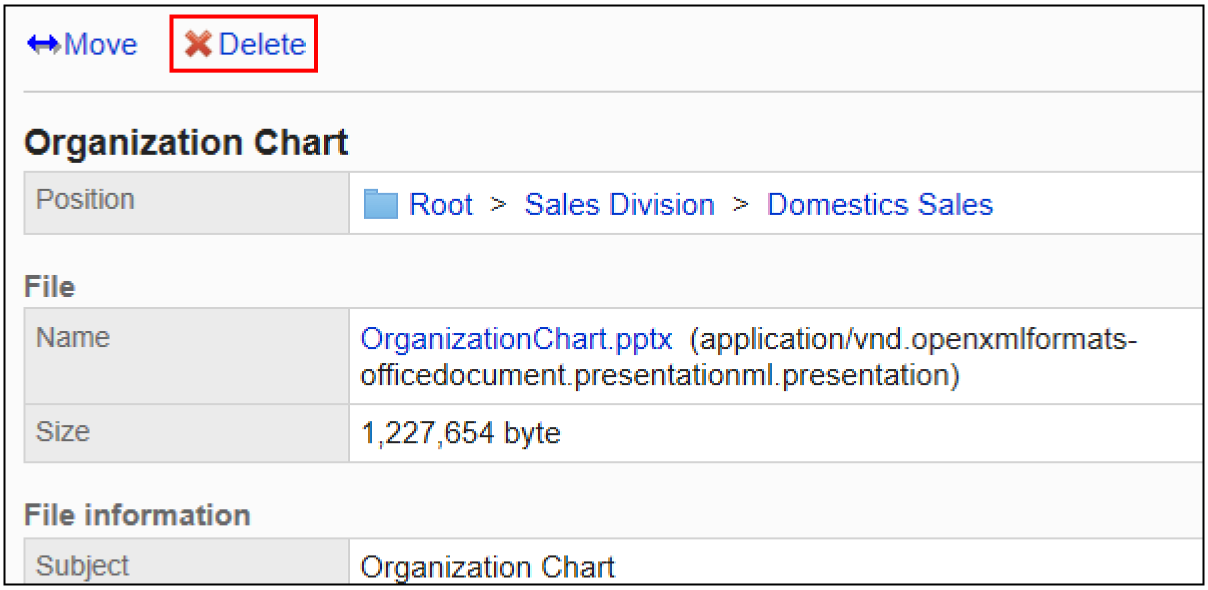
4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select a folder and click the title of the file you want to delete.**



7. **On the "File Details" screen, click "Delete".**



8. **Click "Yes" on the "Delete files" screen.**

Deleting Multiple Files Together

Delete multiple files at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

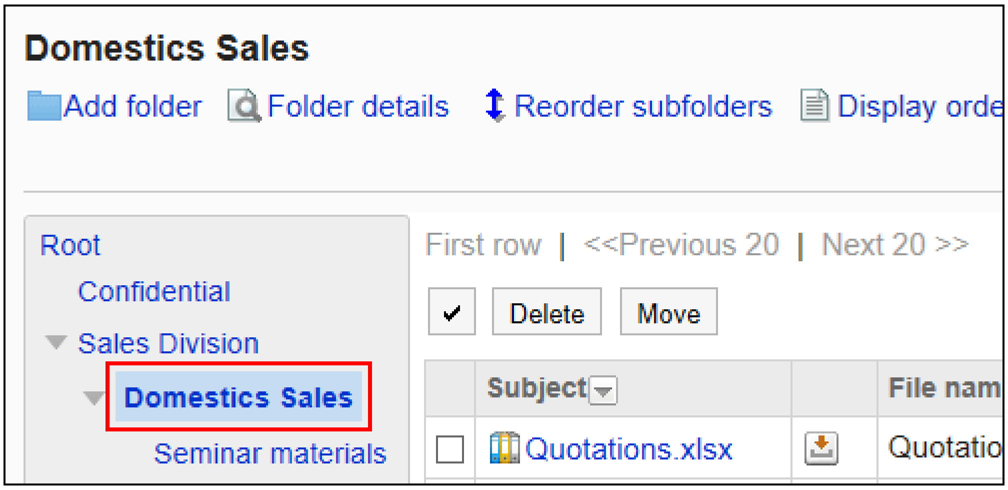
2. **Click "System settings".**

3. **Select "Application settings" tab.**

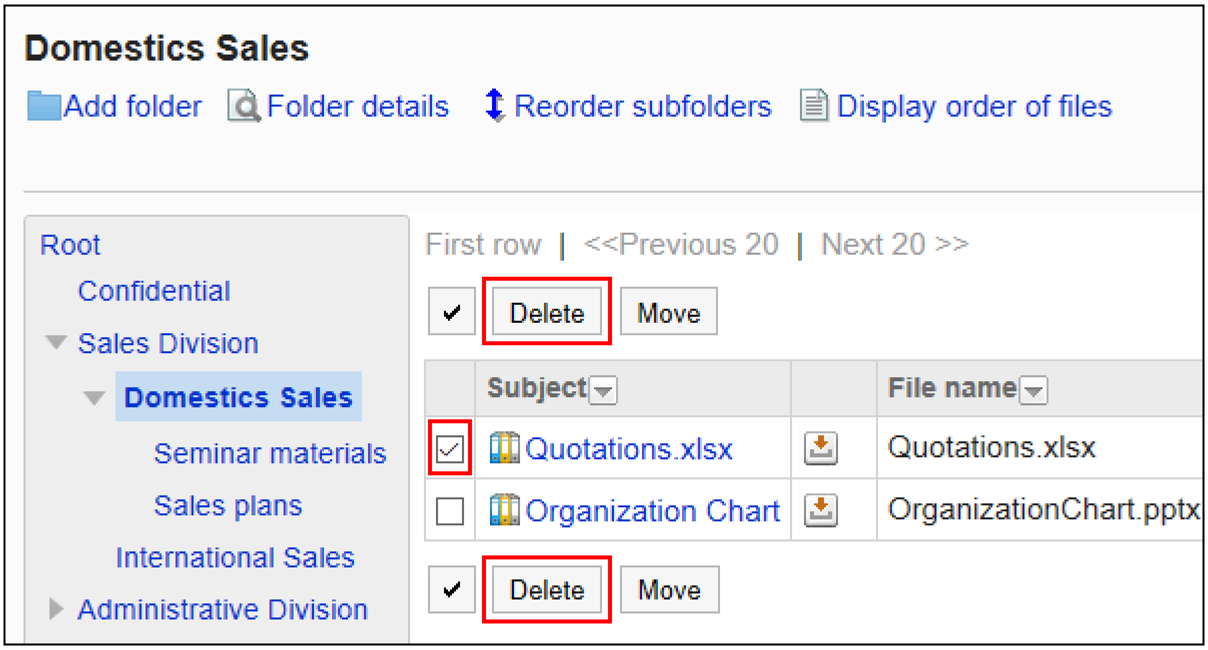
4. **Click "Cabinet".**

5. **Click "Folder Settings".**

6. **On the "Folder Settings" screen, select a folder.**



7. **Select the check box for the file you want to delete, and then click "Delete".**



8. **Click "Yes" on the "Delete files" screen.**

Restoring Deleted Files

Delete files that have been deleted and moved to trash.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

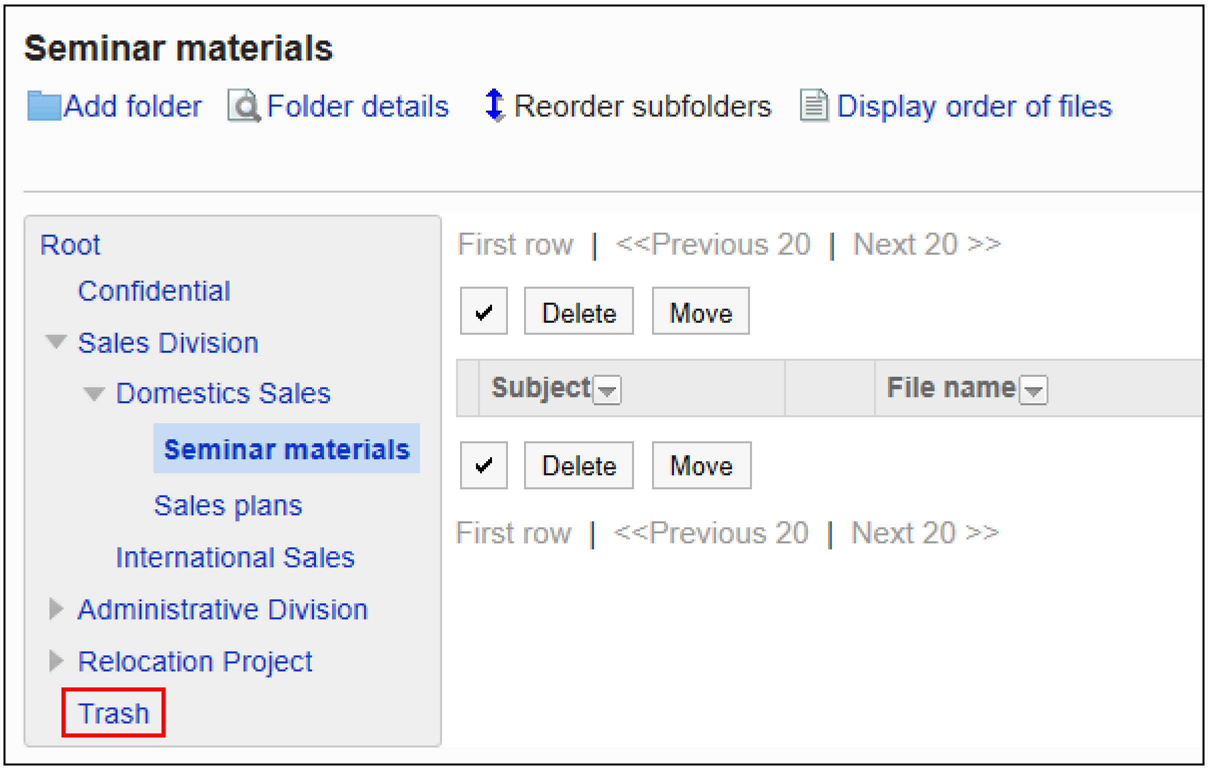
3. **Select "Application settings" tab.**

4. **Click "Cabinet".**

5. **Click "Folder Settings".**

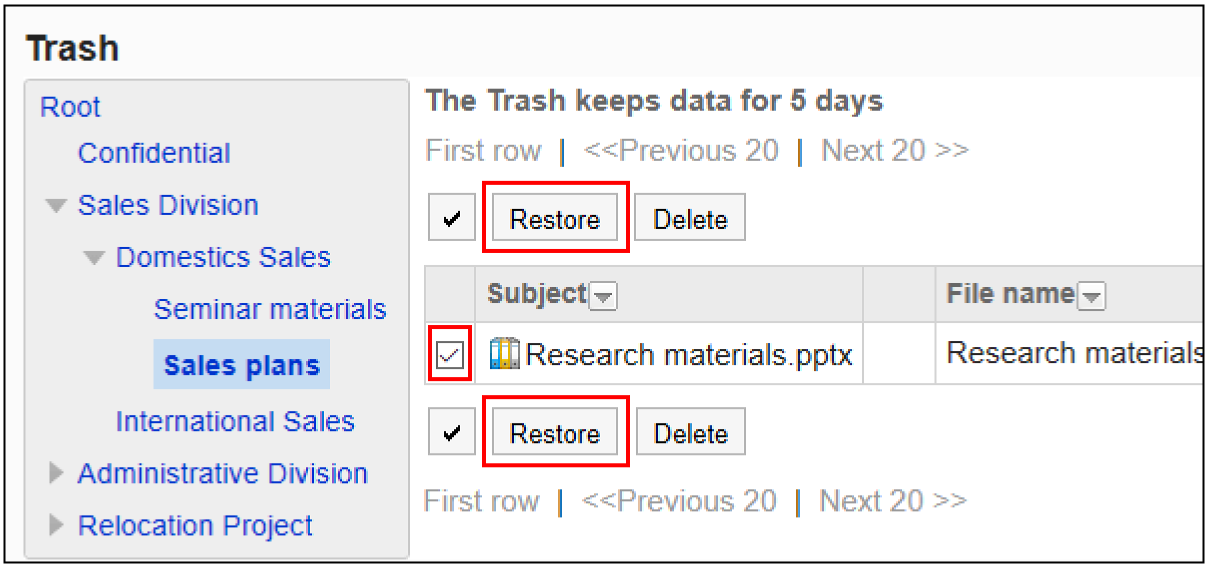
6. **On the "Folder Settings" screen, select a folder that has been saved before the file is moved to "trash".**

7. **Click Trash.**



8. Select the check box for the undo file, and then click Undo.

Go to the folder that was saved before the file was deleted.



2.7.7. Managing Cabinet Using CSV Files

Manages file management data in a CSV file.

The following data can be managed using CSV files:

- Folders
- Folder names
- Access Permissions
- Operational Administrative Privileges
- Notification Settings

Importing Data from a CSV File

Import file management data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on CSV files, refer to the CSV format in Cabinet(1861Page).

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Cabinet".**

6. **Click "Import from CSV file".**

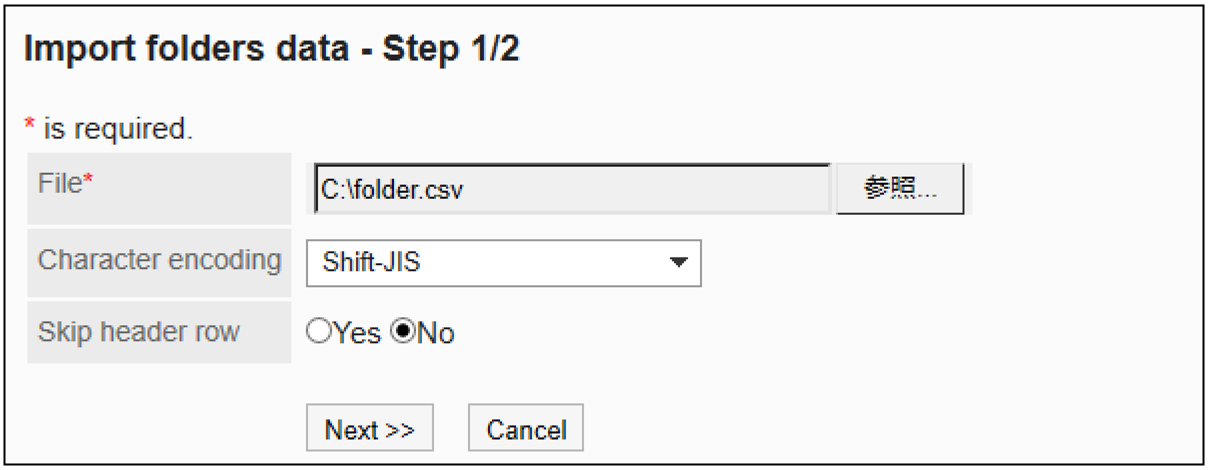
7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the data to import, and click "Next".**

   The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



10. Confirm the CSV file contents and click Import.

Exporting Data to a CSV File

Export data from file management to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Cabinet".

5. **Click "Export to CSV file".**

6. **On the "Export to CSV File" screen, select the data to export.**

7. **Set the required items for the the data to export.**

The setting fields are as follows:

- Character encoding:

  Select the character code that you want to use for encoding.

  Following character codes can be selected.

  - Unicode (UTF-8)

    You can select with BOM as required.

  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".

- Language in which the data is exported:

  This field is displayed when you export a folder name.

  Set the language in which you want to export folder names. You can set multiple languages.

  The following languages can be selected:

  - All
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese

    Exported in Traditional Chinese.

8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

2.8. Memo

This is an application to save personal notes and files. Only users who have added notes and files in Memo can view, change, and delete them.
System administrators or application administrators manage the functions that users use in Memo.

References

- General Settings for Notes(1071Page)
- Working with Memo
- Working with Files

2.8.1. General Settings for Memo

On "General settings" screen in Memo, you can set the basic functions for Memo.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Memo.**
5. **Click "General Settings".**

6. In "Total size of attachments" field on "General settings" screen, you can set the total size of files available to users in notes.

The total file size of Memo is total of the following files:

- Files added to folders
- Files attached to Memo

The following maximum values can be selected:

- Unlimited
- Disabled
- 1MB
- 3MB
- 5MB
- 10MB
- 50MB
- 100MB

7. In the field to allow to use Rich Text Formatting, select whether to allow the feature.

8. Confirm your settings and click "Save".

2.9. Phone Messages

Phone Messages is an application to use to leave messages for phone calls received while the recipient is absent. Administrators such as system administrators and application administrators can set access permissions to limit who can view phone messages or add them.

References

- General Settings for Phone Messages(1073Page)
- Setting Access Permissions for Phone Messages(1074Page)

- Adding Phone Messages

2.9.1. General Settings for Phone Messages

On "General settings" screen in Phone Messages, you can set the basic functions for Phone Messages.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Phone Messages.**
5. **Click "General Settings".**
6. **On "General Settings" screen, select Single Sign-on for Phone Messages.**

   The drop-down list displays the single sign-on associated with the phone message, which is added to the "single sign-on" of the basic system.

   When you set a single sign-on, clicking a user name on the "Phone Messages" screen allows the user to log in to the specified system using single sign-on.
   For details, see Single Sign-On Settings(196Page).

7. Confirm your settings and click "Save".

2.9.2. Setting Access Permissions for Phone Messages

For Phone Messages of a user, you can set the following permissions based on organizations, users, or roles.

- Access permissions
- Add Privileges

The permissions for phone messages vary by the security model applied to the messages.
The default setting is set to "REVOKE (All users have access except users on list)". Therefore, all users are allowed to view and add Phone Messages.
For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

For the setting examples for each security model, refer to the following.

- If the Security Model Is GRANT (Only users on list have access)
- If the Security Model Is REVOKE (All users have access except users on list)

Setting User Rights

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. **Select "Application settings" tab.**

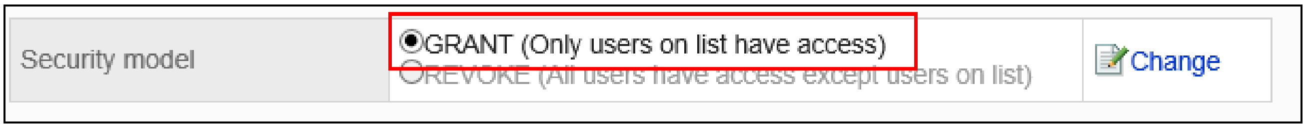
4. **Click Phone Messages.**

5. **Click "Edit user rights".**

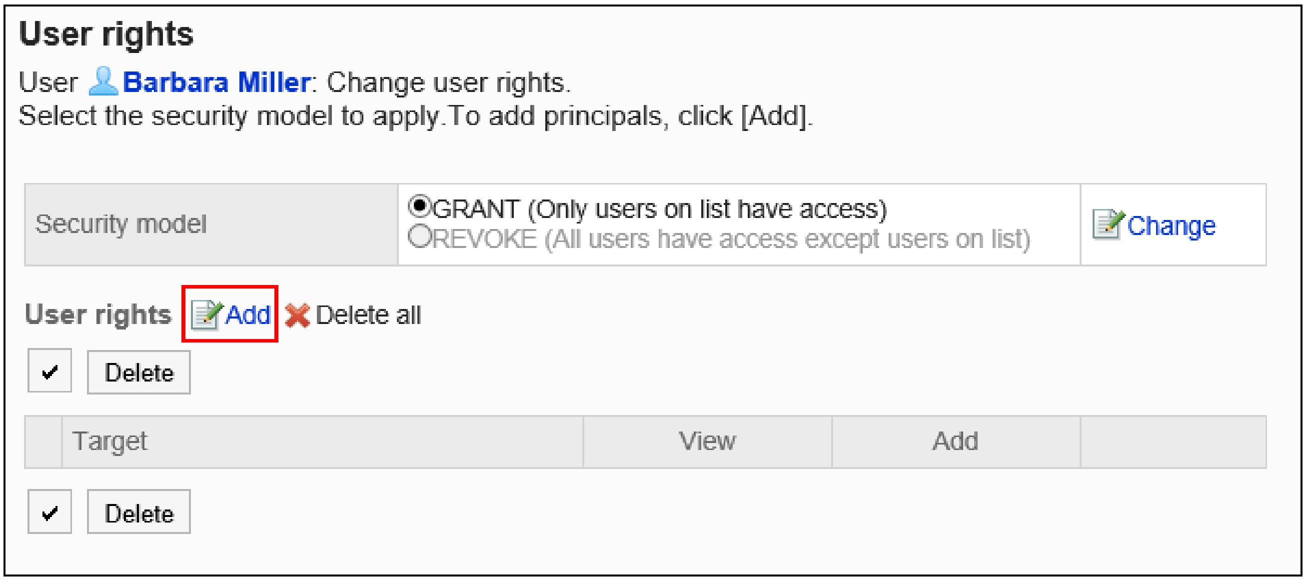
6. **On the "Edit user rights" screen, select departments, users, or roles to set.**

7. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).



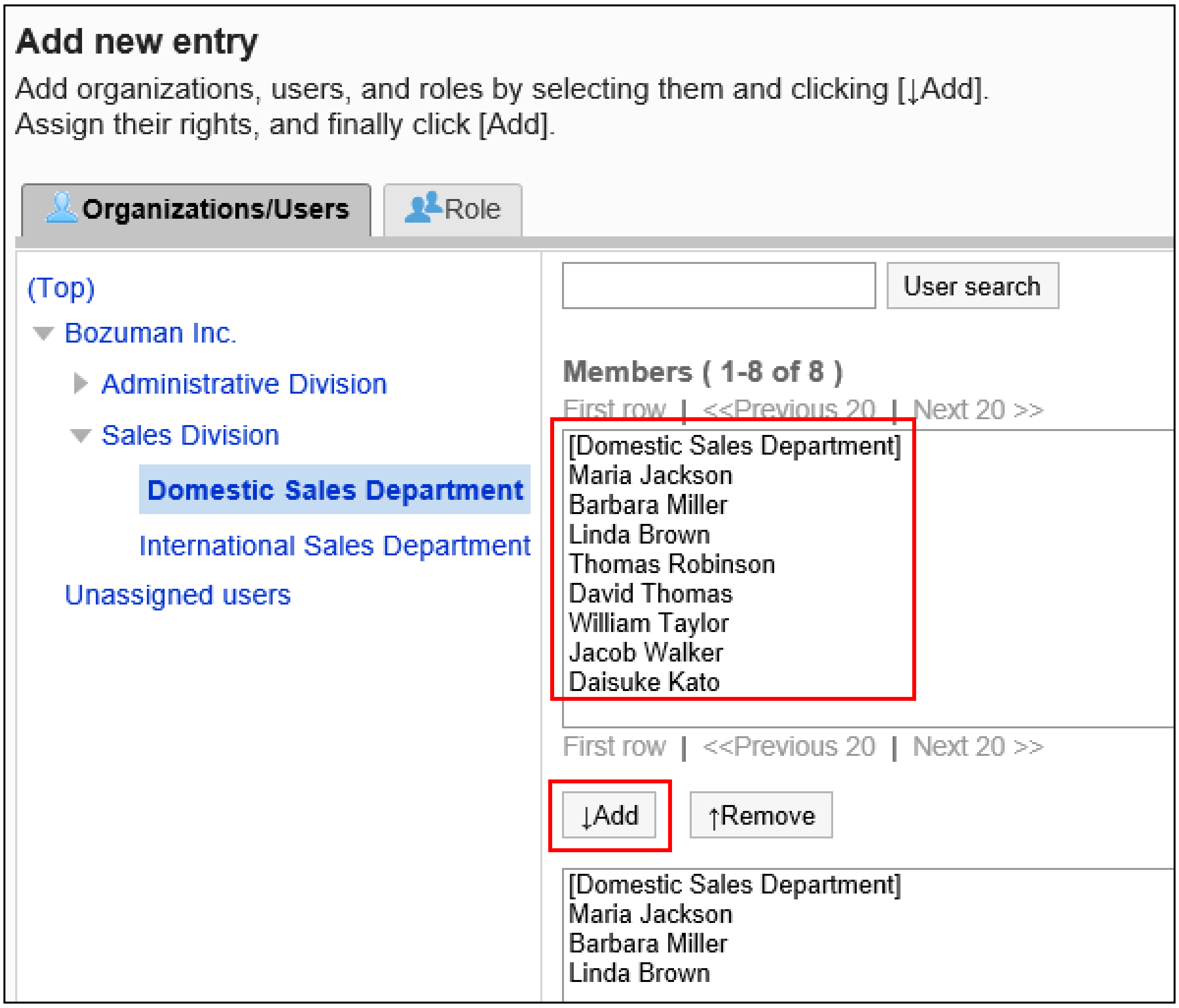
8. **Click "Add".**



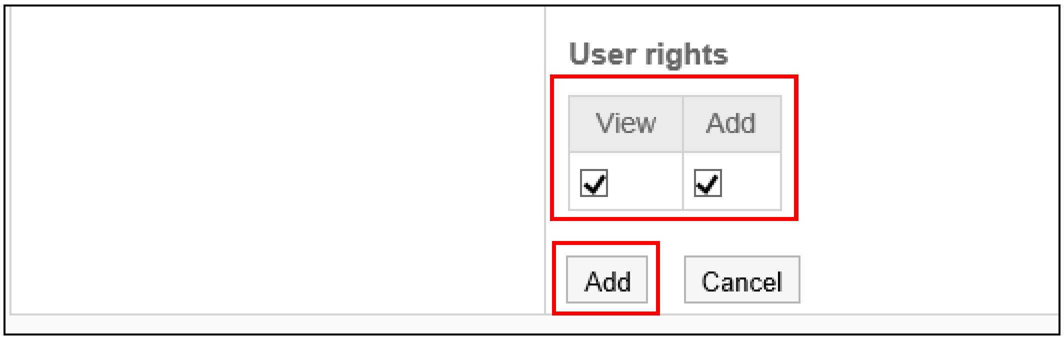
9. **On the "Add new entry" screen, select the organization, user, or role, and then click "Add".**

To select a role, switch the view to the Roles tab.

After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

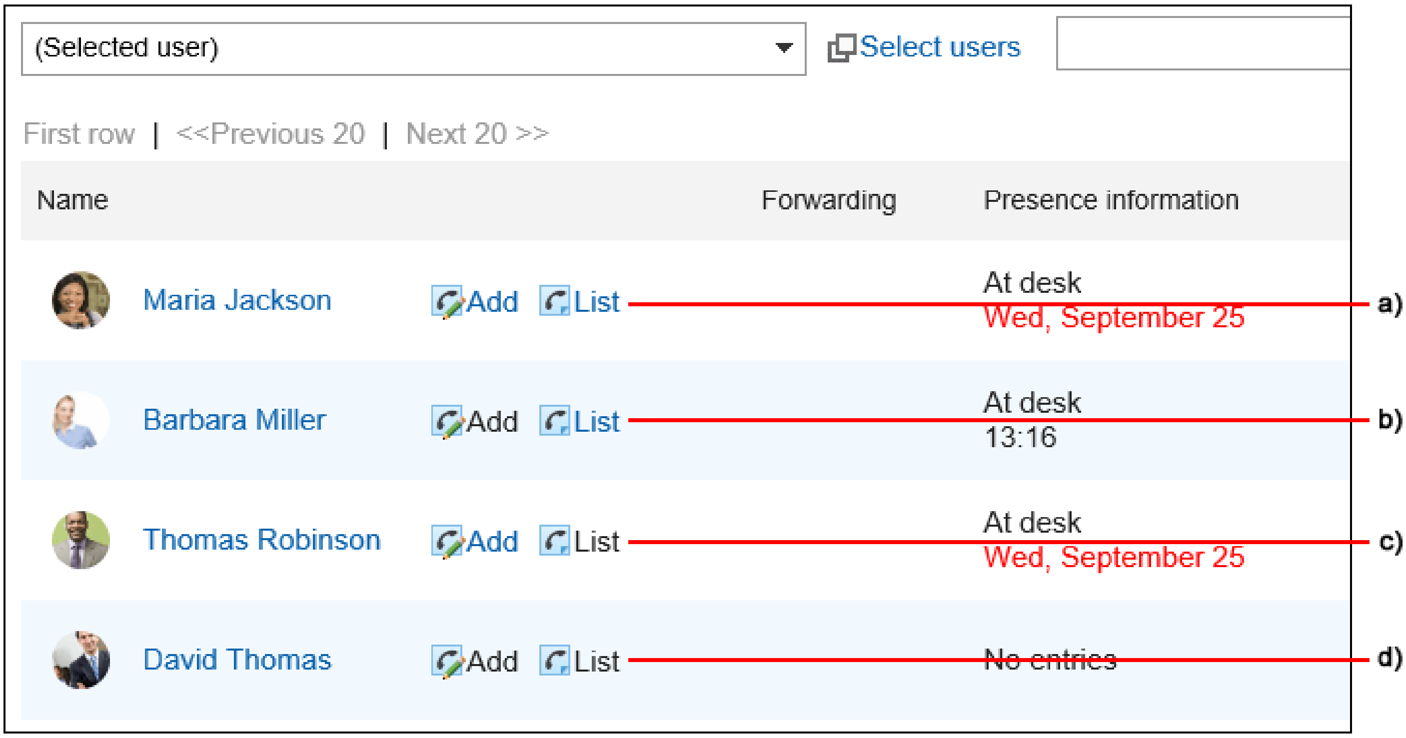


10. **Under "User rights", select the check box for "View" and click "Add".**



Combination of User Rights

When you control user actions of Phone Messages by permissions, only links on which the logged in users can work with are activated on their screens.



a): You can add and view phone messages

b): You can't add phone messages but can view them

c): You can add phone messages but can't view them

d): You can't add and view phone messages

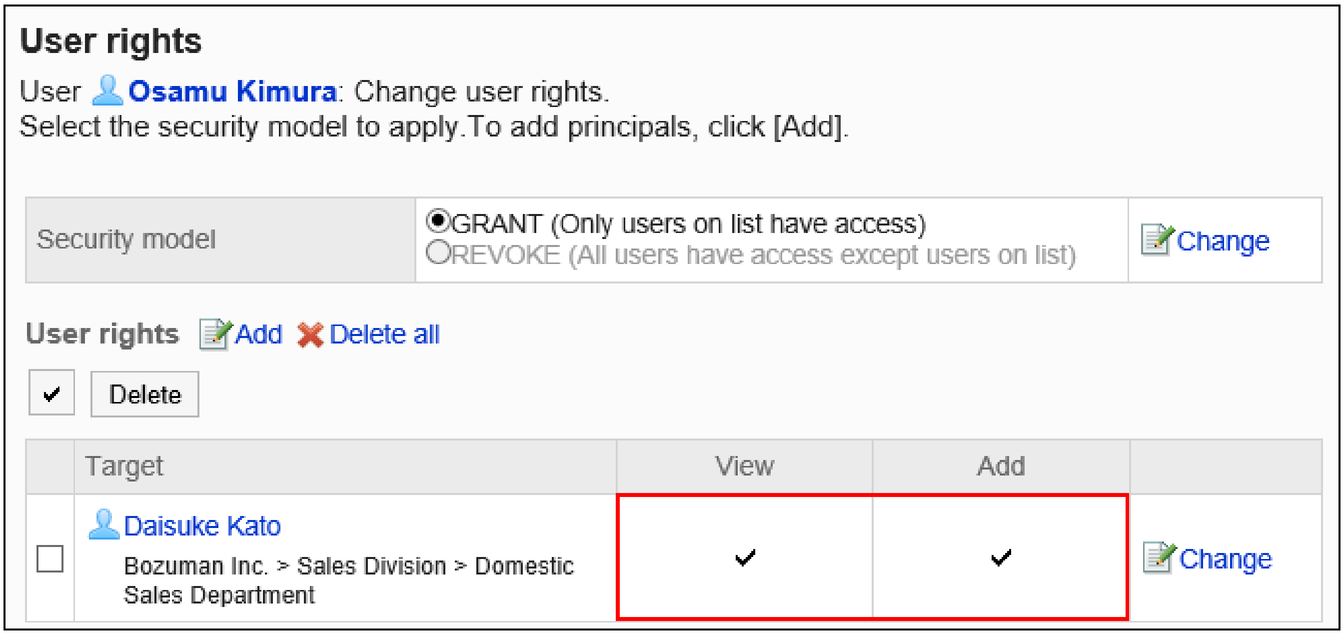
Permissions When User Rights Are Duplicated

When both a user and a department or a role to which the user belongs have access permissions to a phone message, the access permission that the user has overrides the other. For details, refer to When Organizations, Users, and Roles Have Different Permissions(53Page).

If the security model is "GRANT (Only users on the list have access)"

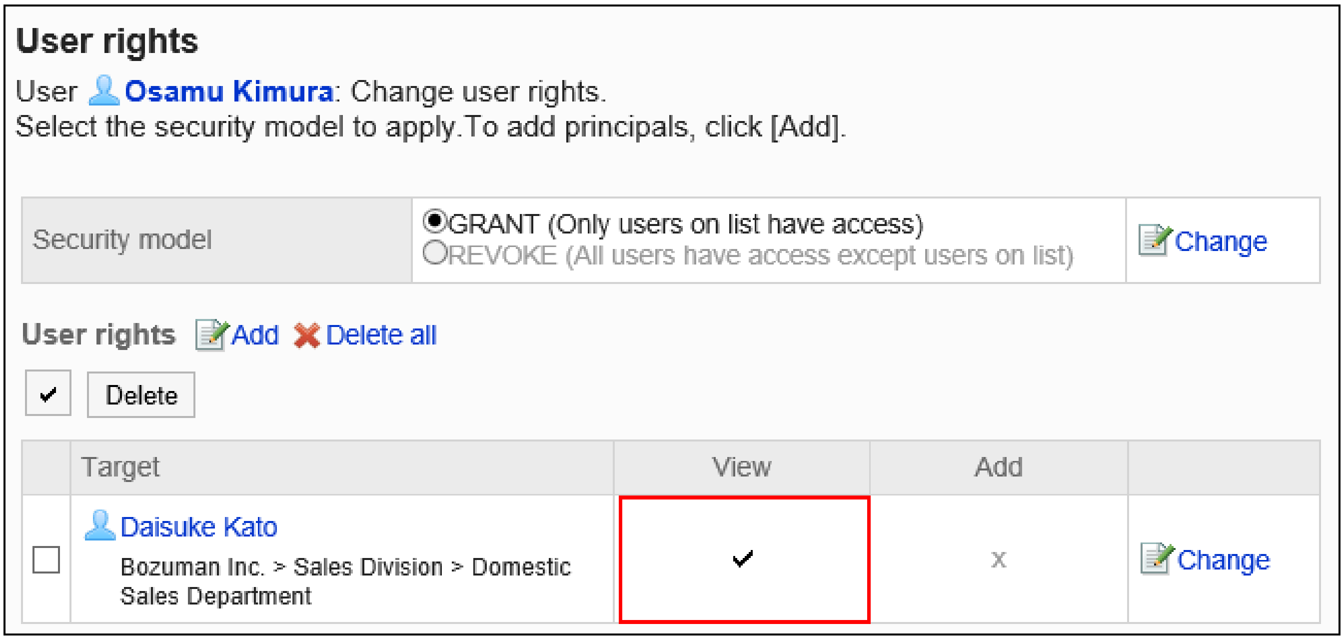
The example shows that the case in which the access permission security model for Osamu Kimura is "GRANT (Only users on list have access)".

- **Example of allowing Daisuke Kato to perform all the actions on Osamu Kimura's items:**
  Grant Daisuke Kato permissions to view and add phone messages.



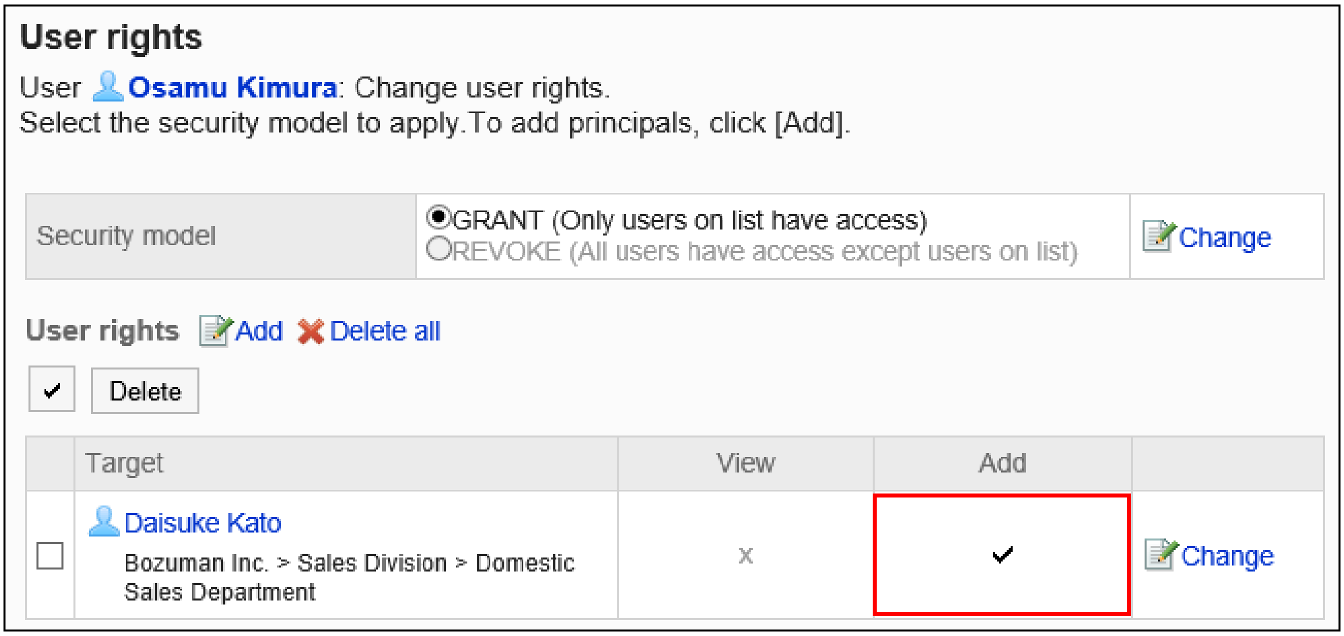
- **Example of allowing Daisuke Kato to perform only view phone message actions on Osamu Kimura's phone messages:**

  Grant Daisuke Kato a permission to view items.



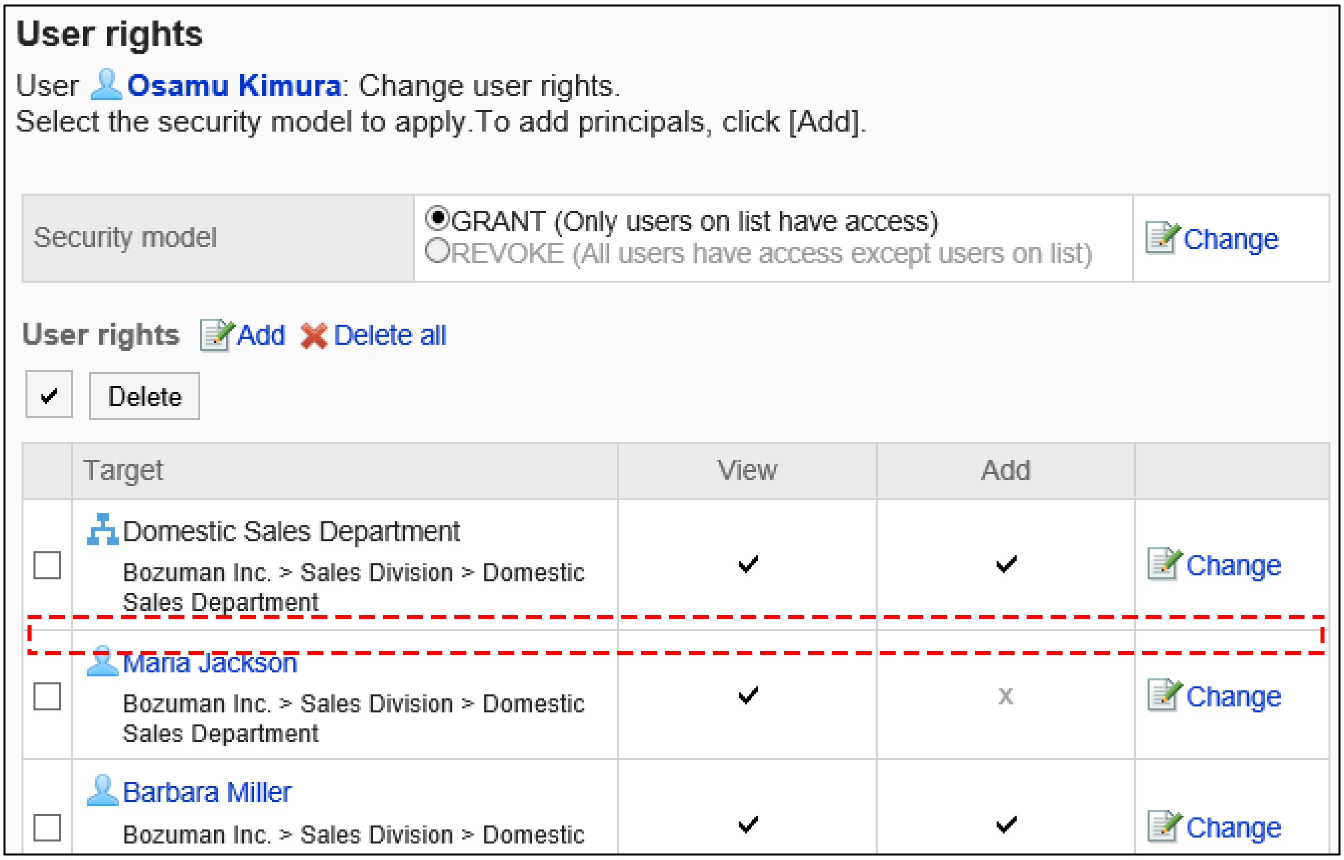
- **Example of allowing Osamu Kimura to perform only add phone message actions:**

  Grant Daisuke Kato a permission to add items.



- **Example of prohibiting Daisuke Kato to perform all the actions on Osamu Kimura's items:**

  Delete Daisuke Kato from the user rights list.

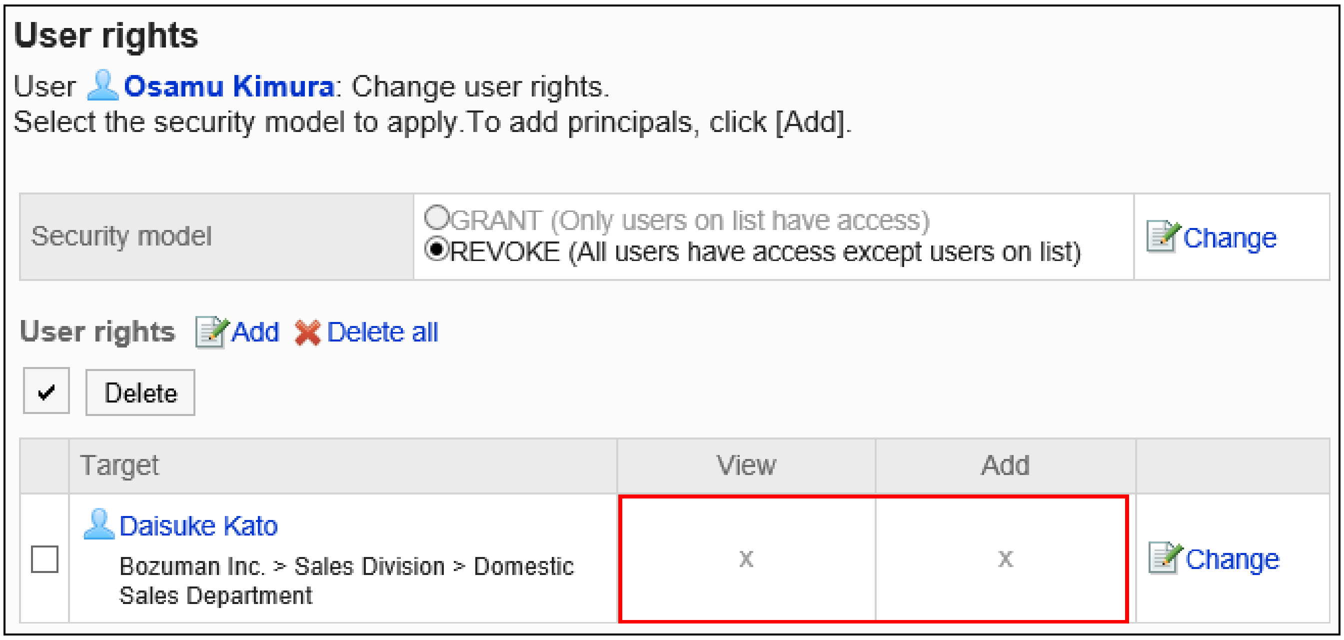


If the security model is "REVOKE (All users have access except users on the list)"

The example shows that the case in which the access permission security model for Osamu Kimura is "REVOKE (All users have access except users on list)".

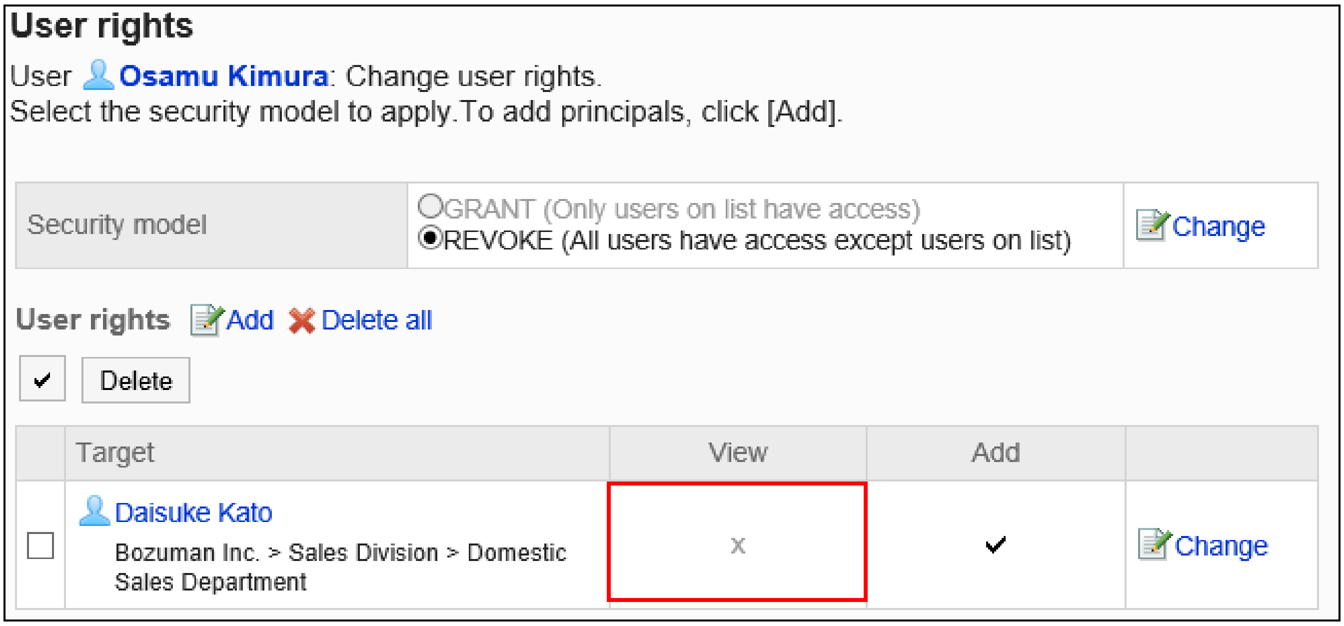
- **Example of prohibiting Daisuke Kato to perform all the actions on Osamu Kimura's items:**

  Delete permissions to view and add items from Daisuke Kato.



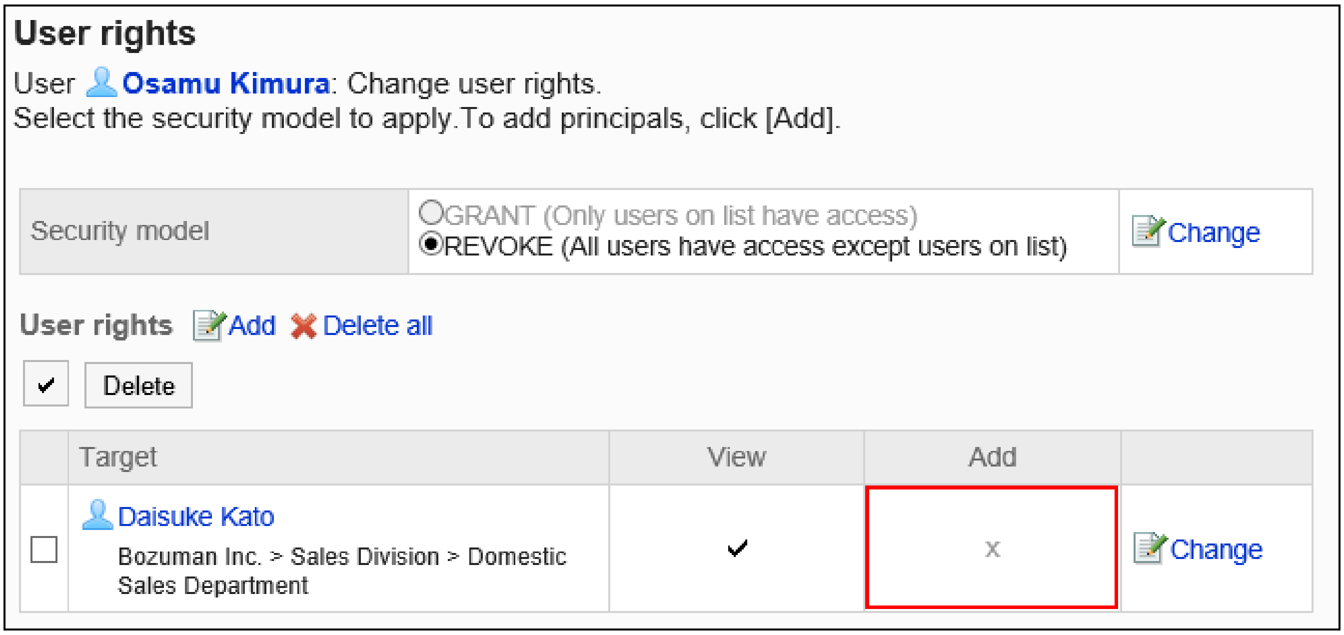
- **Example of prohibiting Daisuke Kato to perform view phone message actions on Osamu Kimura's phone messages:**

  Delete a permission to view appointments from Daisuke Kato.



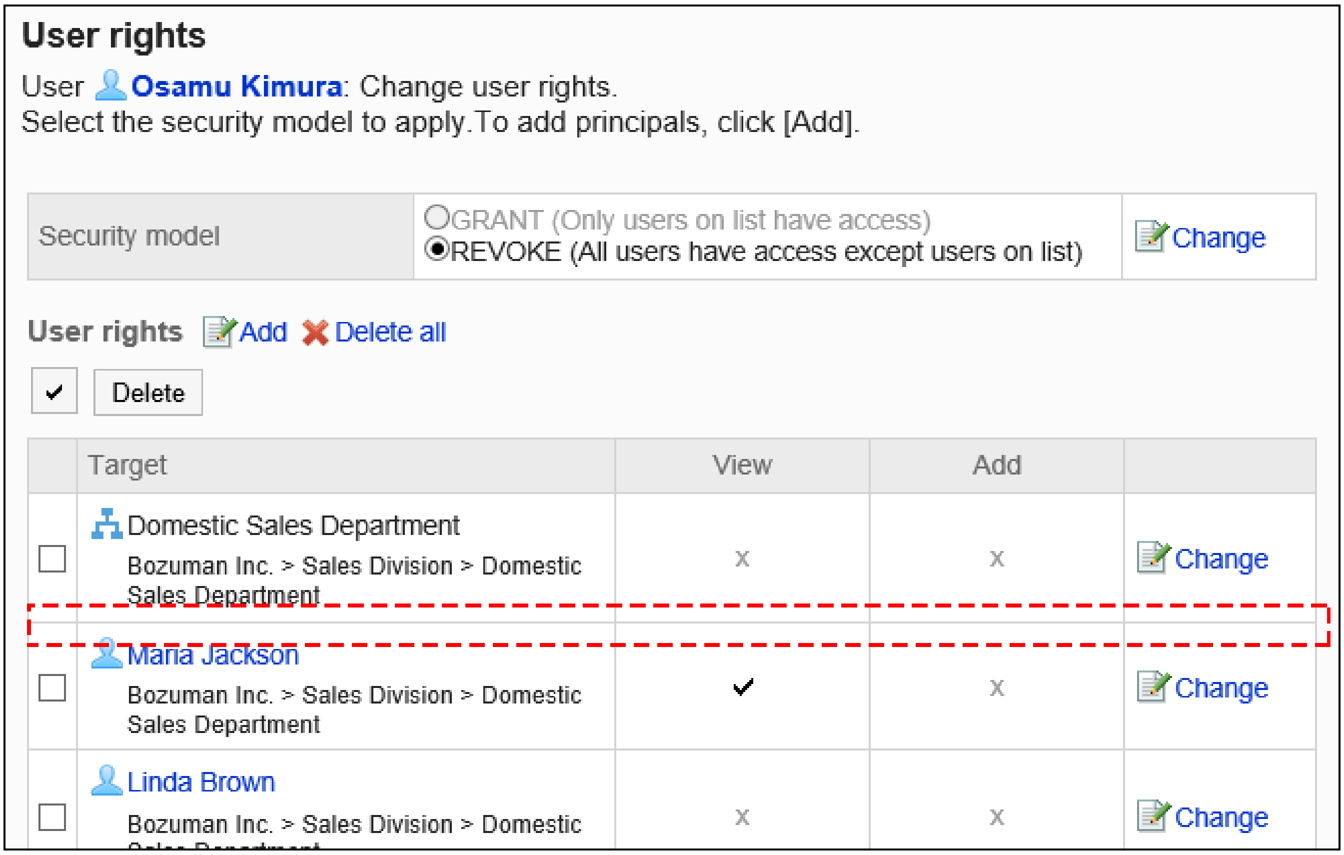
- **Example of prohibiting Daisuke Kato to perform add phone message actions on Osamu Kimura's items:**

  Delete a permission to add phone messages from Daisuke Kato.



- **Example of allowing Daisuke Kato to perform all the actions on Osamu Kimura's items:**

  Delete Daisuke Kato from the user rights list.

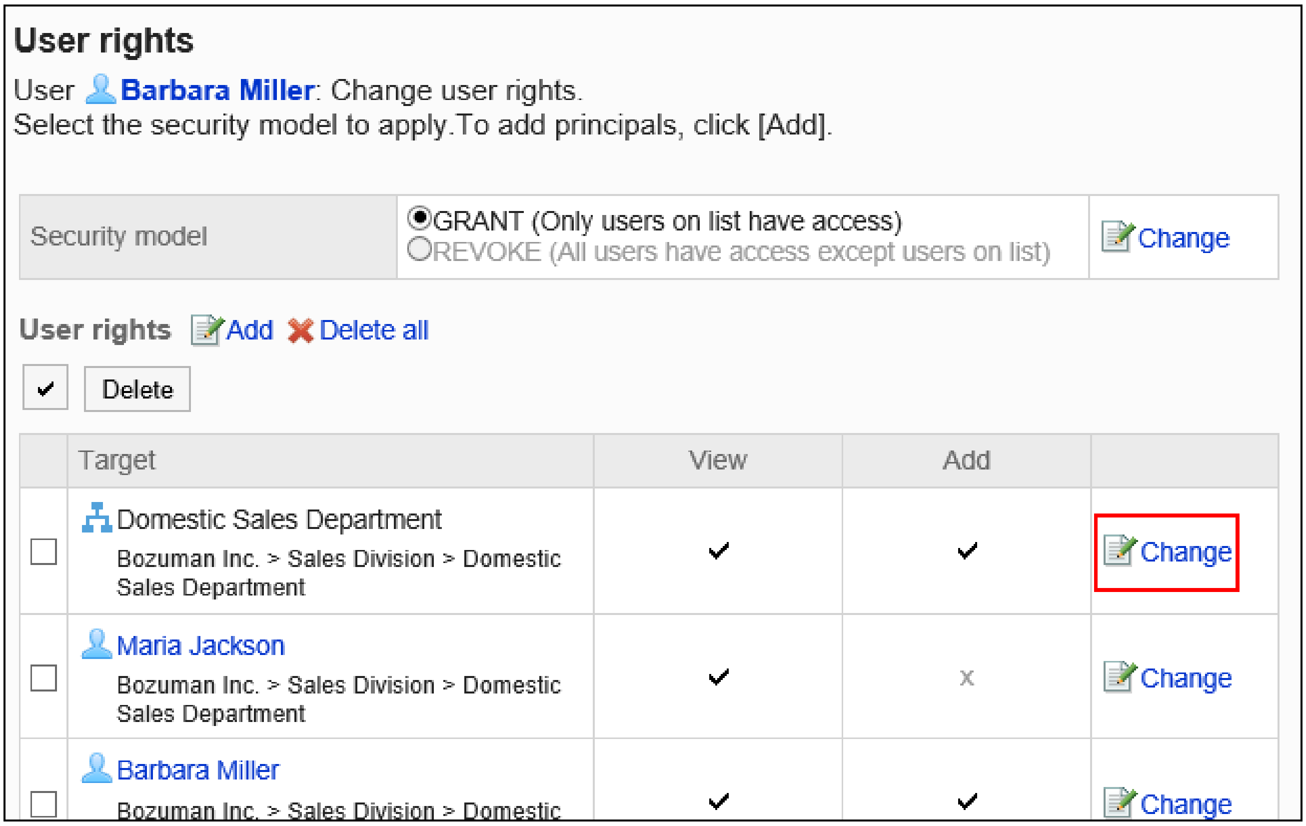


Changing User Rights

Change access permissions granted to users and departments.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Phone Messages.**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen to set user rights, select the organization, user, or role to change the user rights.**
7. **On "User rights" screen, click "Edit" to change the permission.**



8. **On "Edit user rights" screen, you can change the user rights as needed.**
9. **Confirm your settings and click "Save".**

Deleting User Rights

Delete access permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

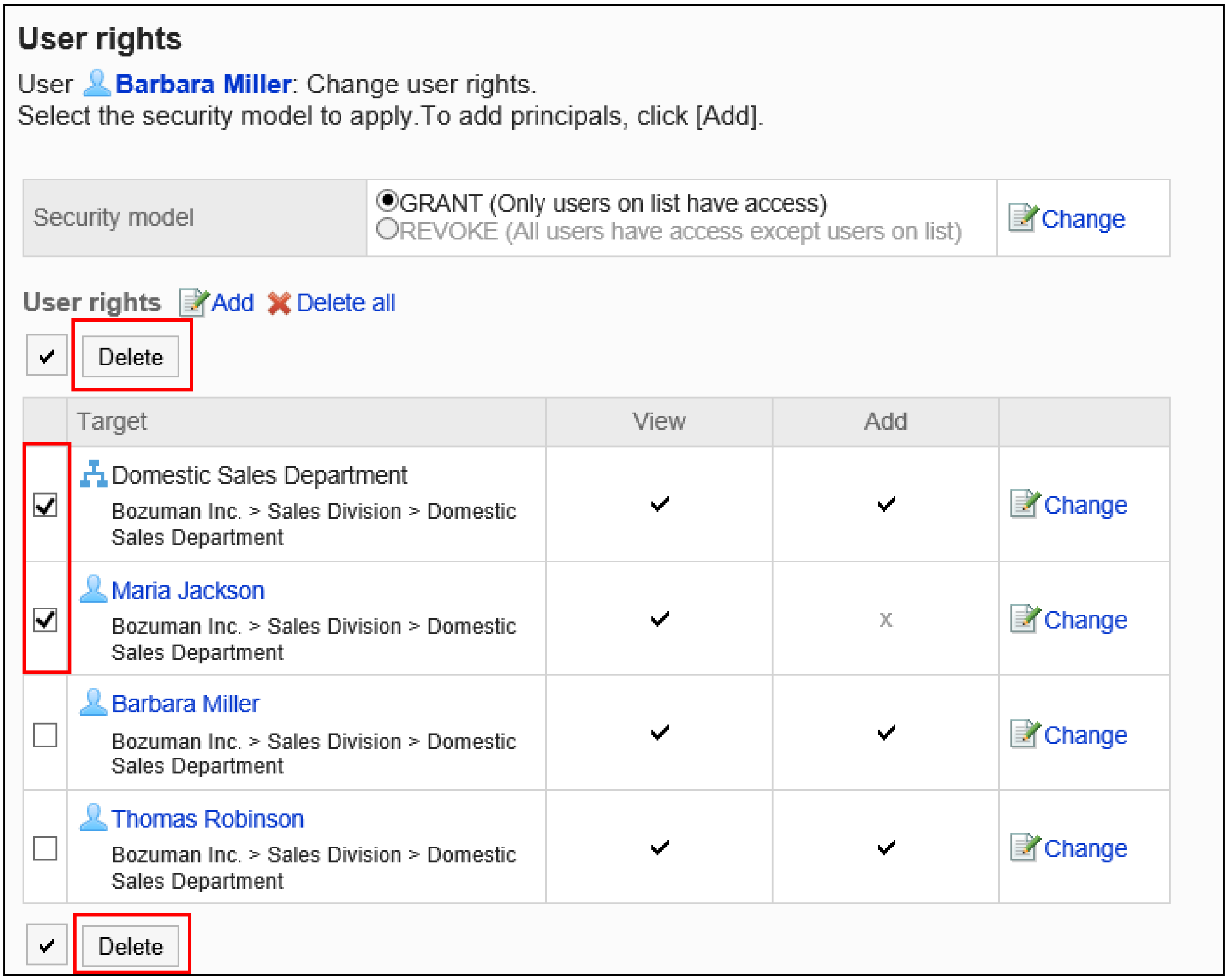
- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click Phone Messages.**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select departments, users, or roles to set.**
7. **On "User rights" screen, select the check boxes of the permissions to delete, and then click "Delete".**



8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

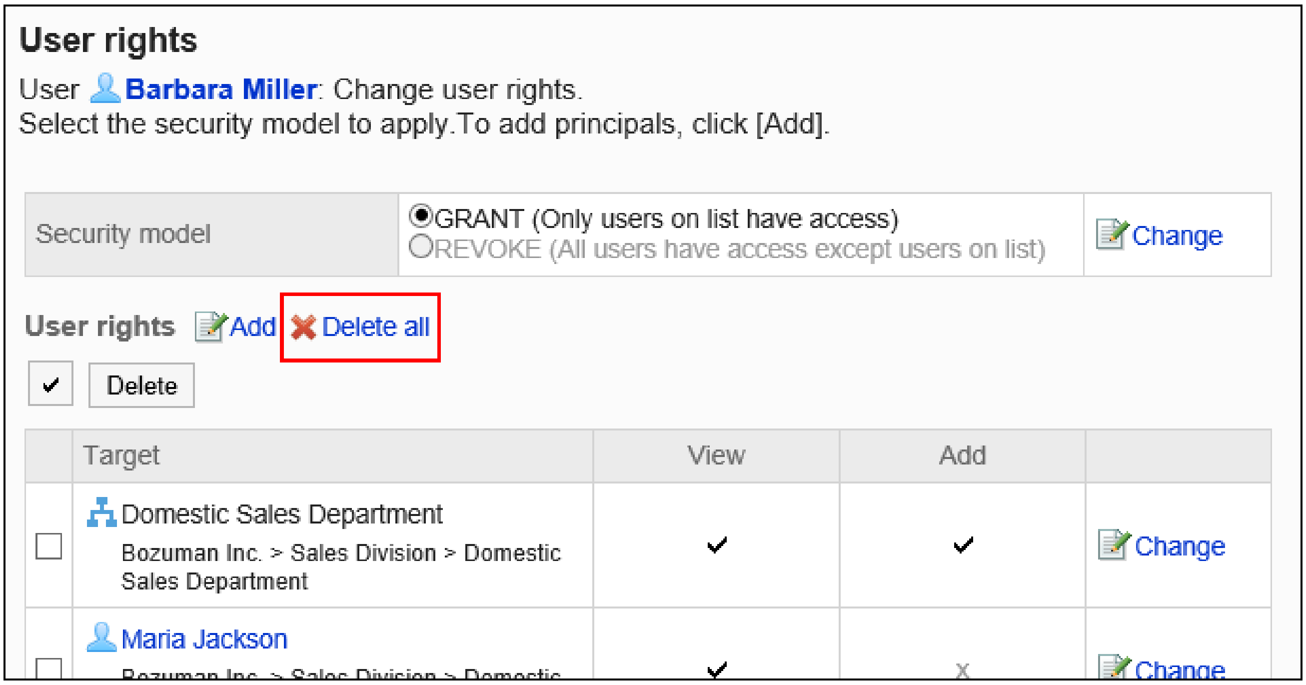
3. **Select "Application settings" tab.**

4. **Click Phone Messages.**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select departments, users, roles, facility groups, or facilities to set.**

7. **On "User rights" screen, click "Delete all".**



8. **Click "Yes" on "Delete all user rights" screen.**

2.9.3. Managing Access Permissions Using CSV Files

Manage access permissions for Phone Messages using CSV files.

Importing Data from a CSV File

Import access permissions for Phone Messages from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

For information on items that can be managed in CSV files, refer to the topic about Phone Messages(1870Page) CSV format.

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click Phone Messages.**

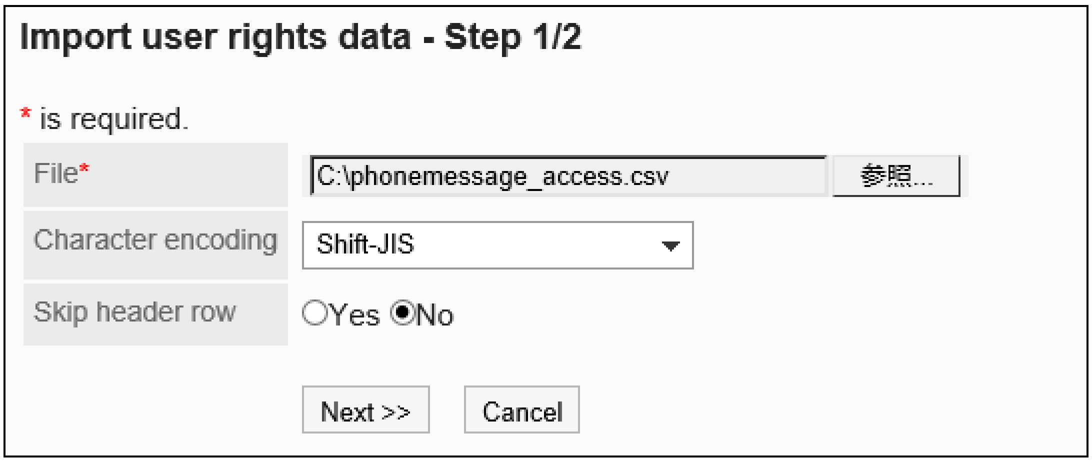
6. **Click the item to import the user rights.**

7. **On the screen to import the user rights step 1/2, select the CSV file that you created in step 1.**

8. **Set the data to import, and click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  Following character codes can be selected.
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



9. On the screen to import the user rights step 2/2, check the contents in the CSV file, and click "Import".

Exporting Data to a CSV File

Export access permissions for Phone Messages to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click Phone Messages.

5. Click to export user rights.

6. On the screen to export user rights, set the required items to export data.

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  Following character codes can be selected.
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".

7. **Confirm your settings and click "Export".**

8. **Save the file with a function provided by your Web browser.**

2.10. Timesheet

The timecard is an application that manages the start and end times of users.

The system administrator configures the user to use the timecard.

When you want to summarize the time data, it is useful to export the data from the timecard to the CSV file.

References

- General settings for the timecard(1088Page)
- View the timecard of each user(1095Page)
- Working hours

2.10.1. General Settings for Timesheets

On the "General settings" screen of the timecard, you can set the basic functions of the timecard.

Using Auto Stamping

The start and end times are automatically recorded by using the auto punch function.

Timing of Stamping

The time that Auto Punch and Manual Punch use to punch the timecards differs depending on which you use.

- **Auto Punch**
  - Start
    The time that is specified in the "Time to date" field is set to the time when the Garoon is first accessed in punch.
  - End
    The last time you accessed Garoon is punch until the time that is set to "time to date is changed".
    This "End" time may not be accurate as the system checks and records the access time every five minutes.

- **Manual Punch**
  - Start
    The time you click "Start" on the timecard will be punch.
  - End
    The time you click "End" on the timecard will be punch.

What is Access to Garoon?

The following actions are considered as accessing Garoon

- Clicking "Star" or "End"
- Clicking "Receive" or "Receive for all accounts"
- Displaying the Garoon application screen
  Example: Displaying Bulletin Board
- Reloading the Garoon screen

Note

- On access from KUNAI (sync mode), the time is not punched on the time card.
- The time of "End" is not recorded in the timesheet by the following actions:
  - Access Garoon from KUNAI (sync mode)
  - Log out of Garoon
  - Closing Web bowser
  - Shutting down the computer

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Timecard".**

5. **Click "General Settings".**

6. **In "Auto punch" field on "General settings" screen, select the Enable check box.**

If you do not use the Auto Punch of timecards, deselect the Enable check box.

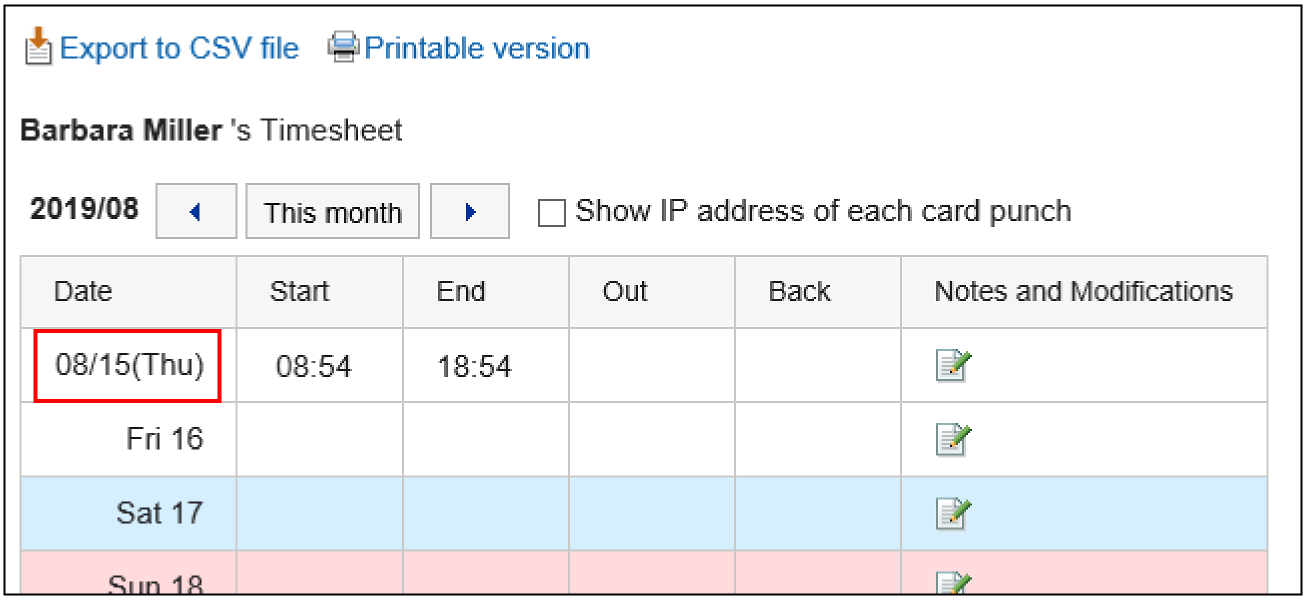
7. **Confirm your settings and click "Save".**

Setting the Start Date of the Aggregation

The day starts the month aggregation.

The start date that you set is displayed in the "Bange" field on the "timecard" screen.

An example of the start date of the aggregation is 15th:



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Timecard".**

5. **Click "General Settings".**

6. **On the "General settings" screen, on the "Start Summary" field, select the date you want to start the aggregation.**

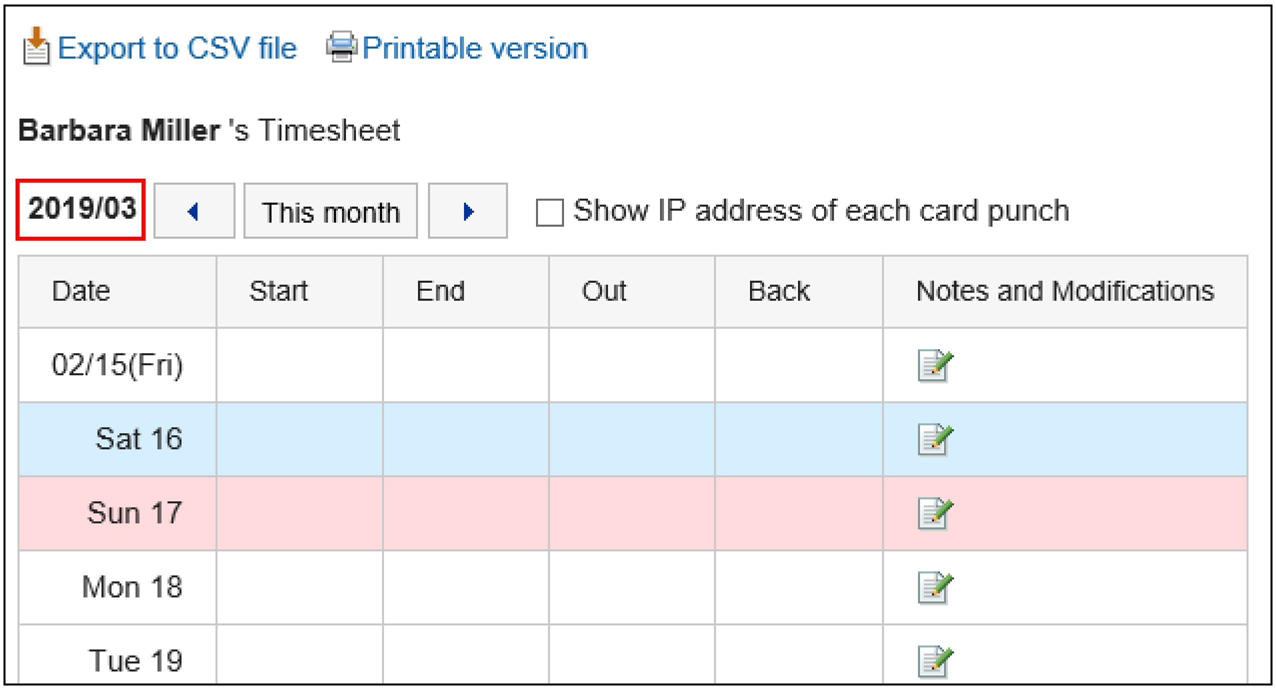
7. **Confirm your settings and click "Save".**

Setting Month View

Displays the month of the aggregation.

The month of the specified value is added to the month of the start date of aggregation.

An example of the start date of the aggregation is February and the Month view is "1":



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Timecard".**

5. **Click "General Settings".**

6. **In the "Month View" field on the "General Settings" screen, select a value to add to the month of the start date of the aggregation.**

The available values are 0, 1, 2, and 3.

7. Confirm your settings and click "Save".

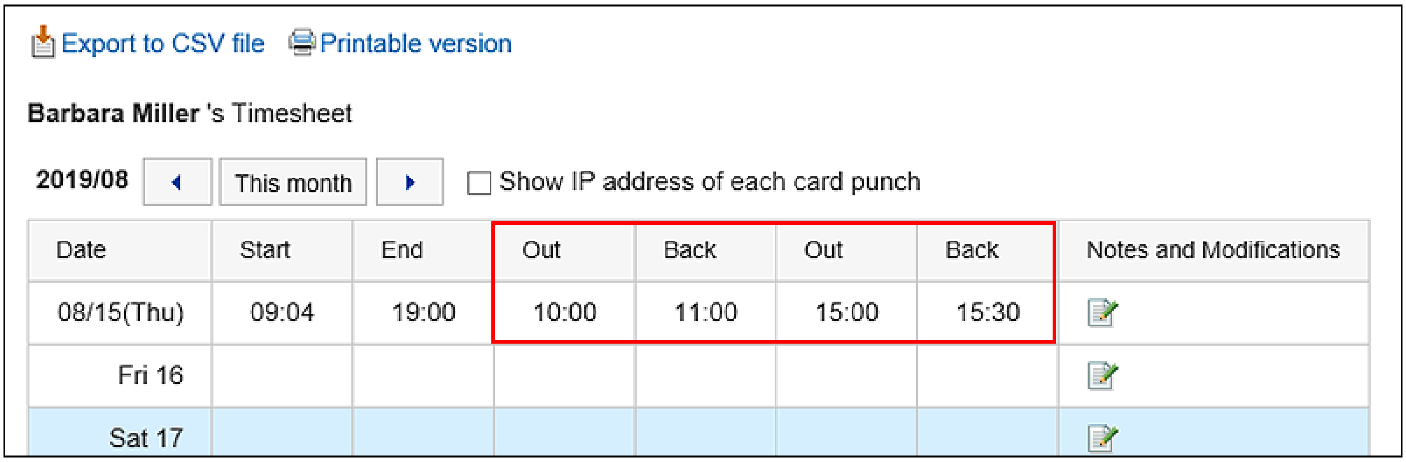
Setting the Maximum Number of Out-of-Office/Return

You can set whether to allow an out-of-date, or back, time recording.

When the number of "out-of-date" is specified in number of times, the "Out" and "Back" settings are displayed on the "Time card" screen of users according to the number of times specified.

The time when the user clicks out or back is recorded as out-of-office time or the back time.

Example of the maximum number of times:



Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Timecard".

5. Click "General Settings".

6. On the "General Settings" screen, select the maximum number of outings and restorations in the "Out of Office" field.

You can select from one to six times. You can also select "Do not use".

7. Confirm your settings and click "Save".

Setting the Time When the Date Is Changed

After the time has been set, the time card automatically moves to the next day.

Steps:

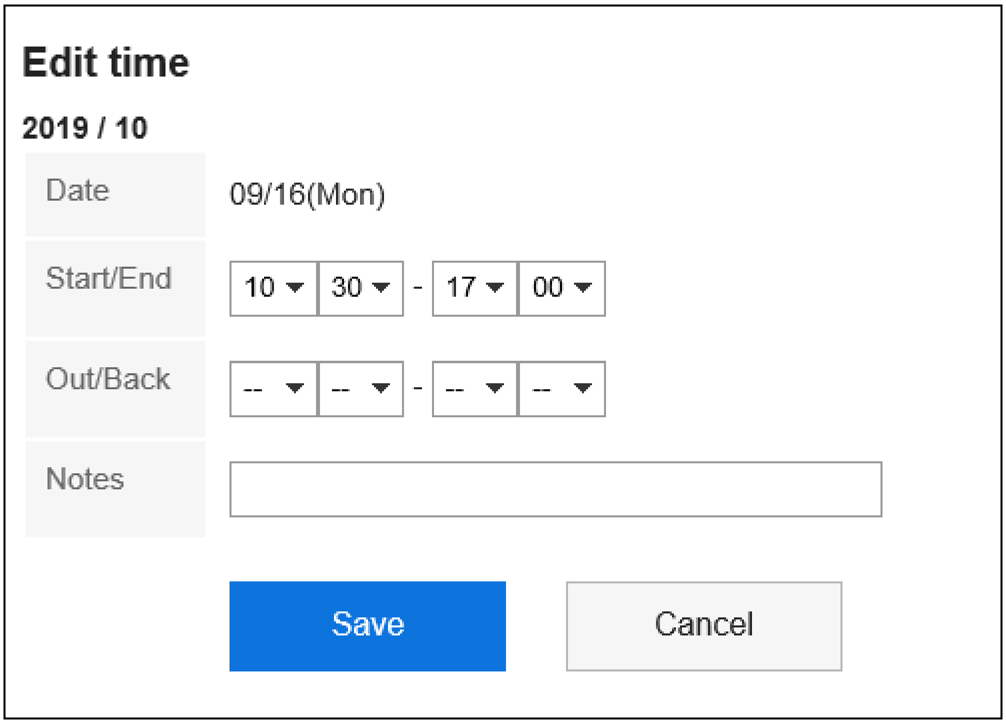
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Timecard".**
5. **Click "General Settings".**
6. **On the "General Settings" screen, select a time in the "Time to date" field.**
7. **Confirm your settings and click "Save".**

Allowing Users to Change the Time

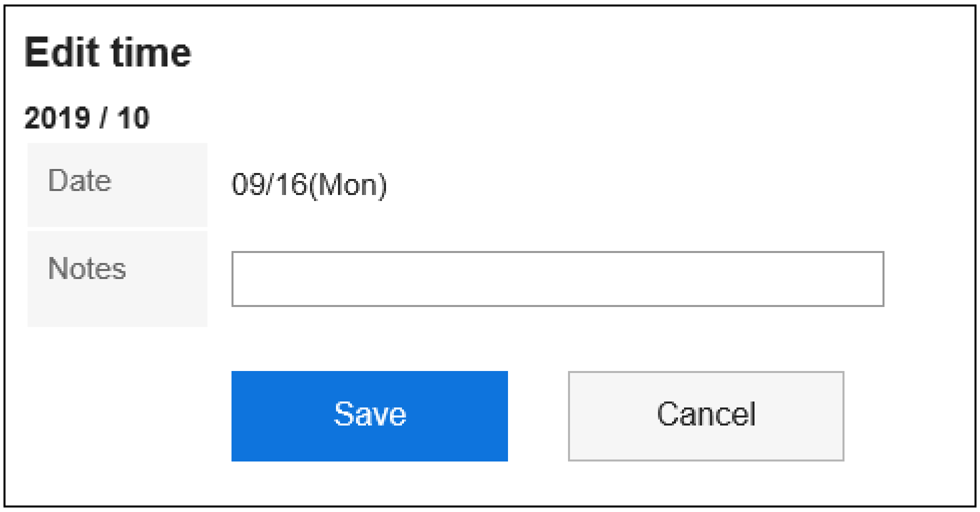
Select whether to allow users to modify the time that is punch to the time card.
The system administrator or application administrator can modify the time of the user's timesheet, regardless of whether or not the user is allowed to modify the time.
If you do not want to allow users to change the time, the following items are not displayed on the "Modify time" screen of the user.

- Work/Work
- Out/back

For example, if you want to allow users to modify the time:



For example, if you do not allow users to modify the time:



Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Timecard".**
5. **Click "General Settings".**

6. On the "General settings" screen, on the "Allow users to change the time" field, select the "Allow" check box.

If you do not want to allow the time to be modified, deselect the "Allow" check box.

7. Confirm your settings and click "Save".

2.10.2. Viewing Timesheet of Each User

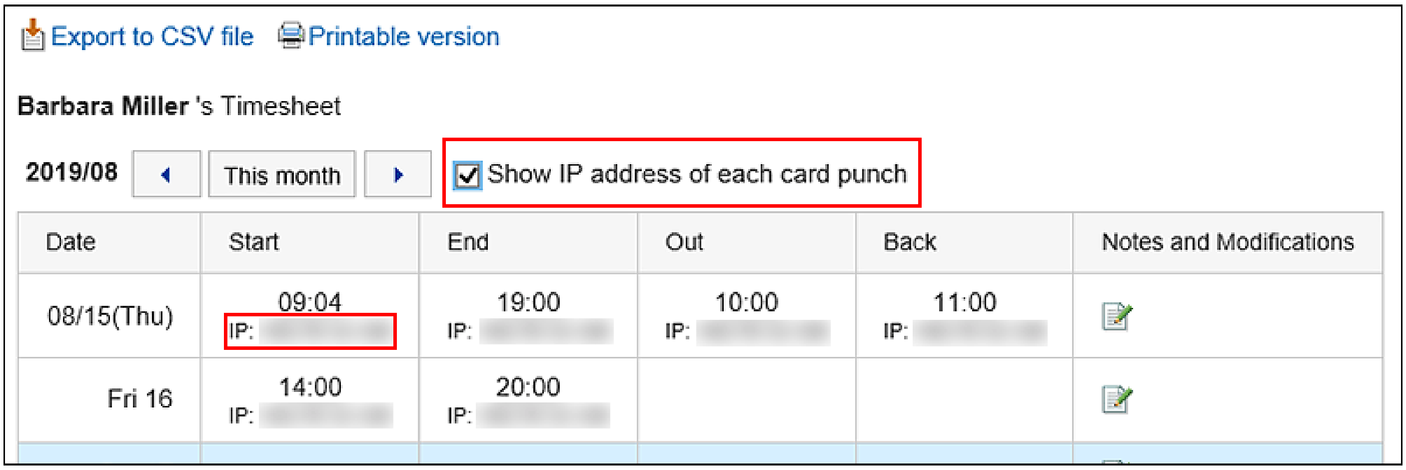
You can view and modify the timecard of each user.

The time is displayed in the format of the time that is specified in the locale settings of each user.

The time zone that is set in the user information is applied to the date and time that is used in the timecard settings.

IP Address View

The Time field on the user's timecard can display the IP address of the user where the time is punch.



IP addresses can be recorded as follows

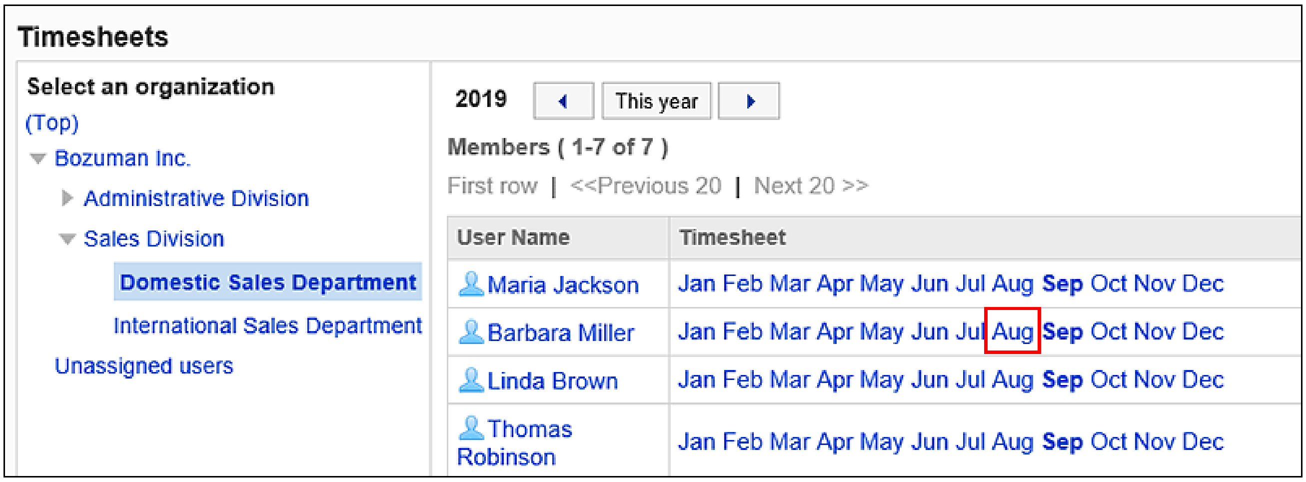
- When the time is punch to the time card
- When one of the following buttons is clicked in the "timesheet" screen of the user or the "timecard" portlet
    - In
    - End
    - Out
    - In
- When the timecard is fixed

Fixing the Timesheet

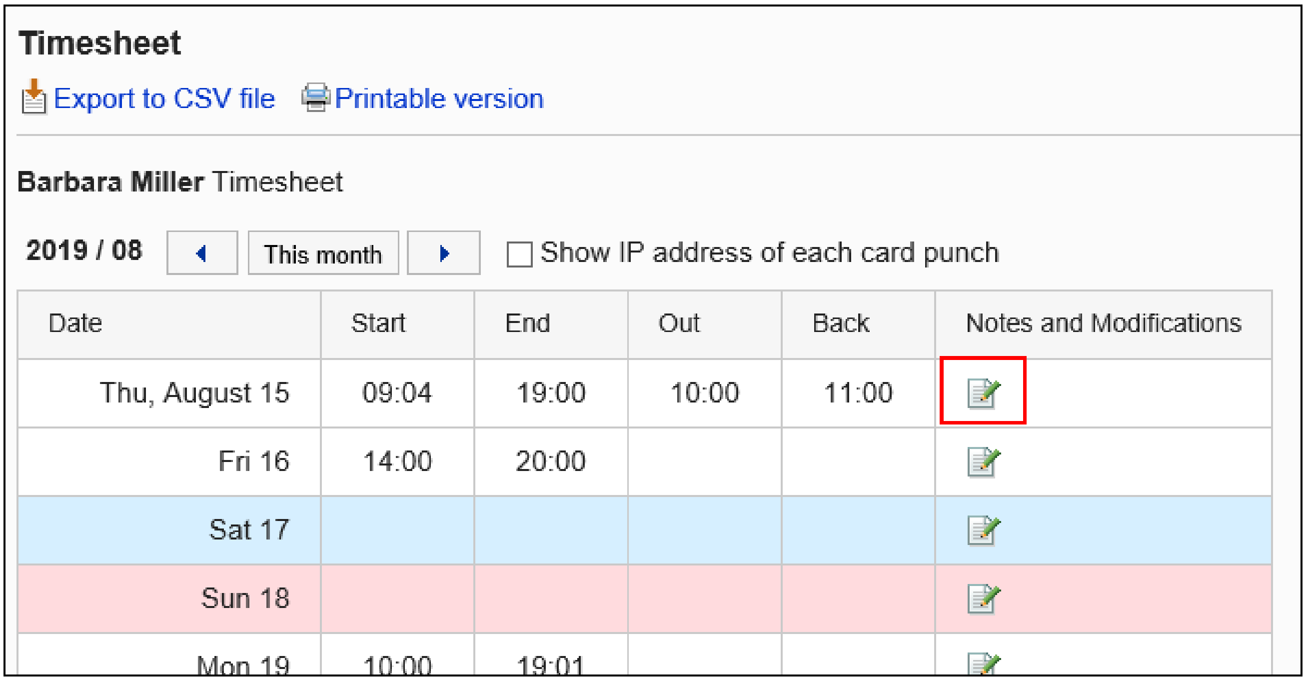
You can modify the time and notes that are punch to the time card of the selected users.
The system administrator or application administrator can modify the time of the user's timesheet, regardless of whether or not the user is allowed to modify the time.
The recorded IP address cannot be edited.

Steps:

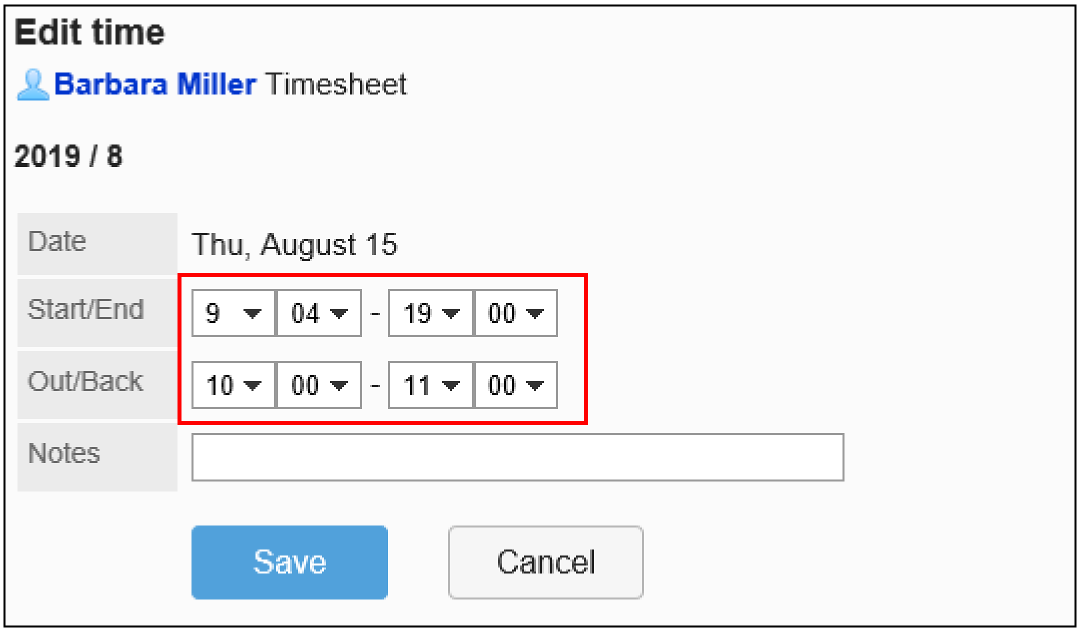
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Timecard".**
5. **Click "Timesheet List".**
6. **On the "Timesheet list" screen, select an organization and click the Month.**



7. **On the "Timesheet" screen, click the icon in the "Notes and corrections" field.**



8. **On the "Fix time" screen, modify the timecard.**



9. **Confirm the details and click "Edit".**

Print Timesheet

Prints the timecard for the selected user.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

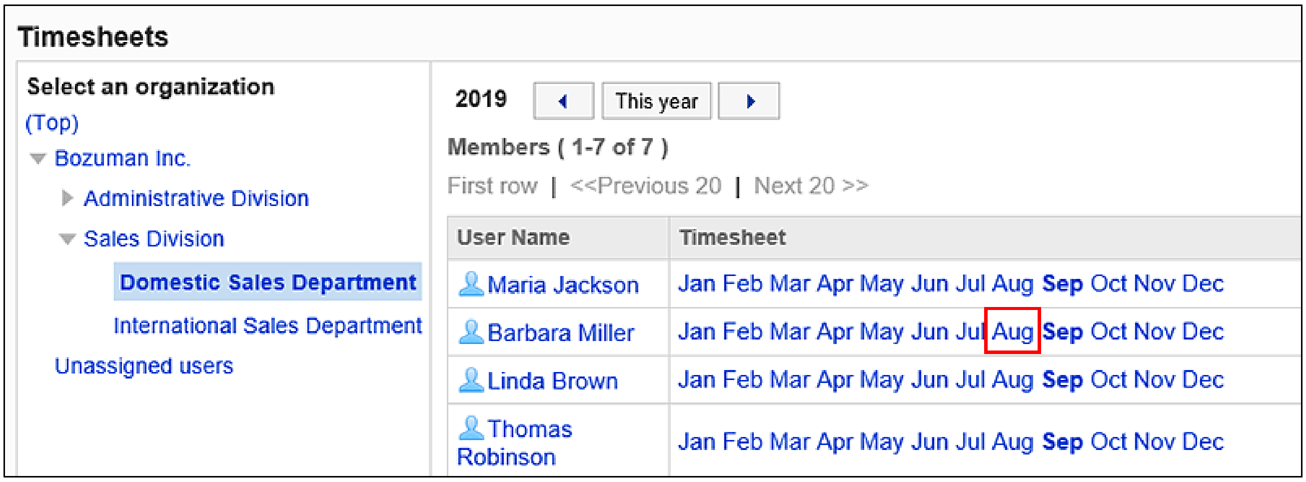
2. **Click "System settings".**

3. **Select "Application settings" tab.**

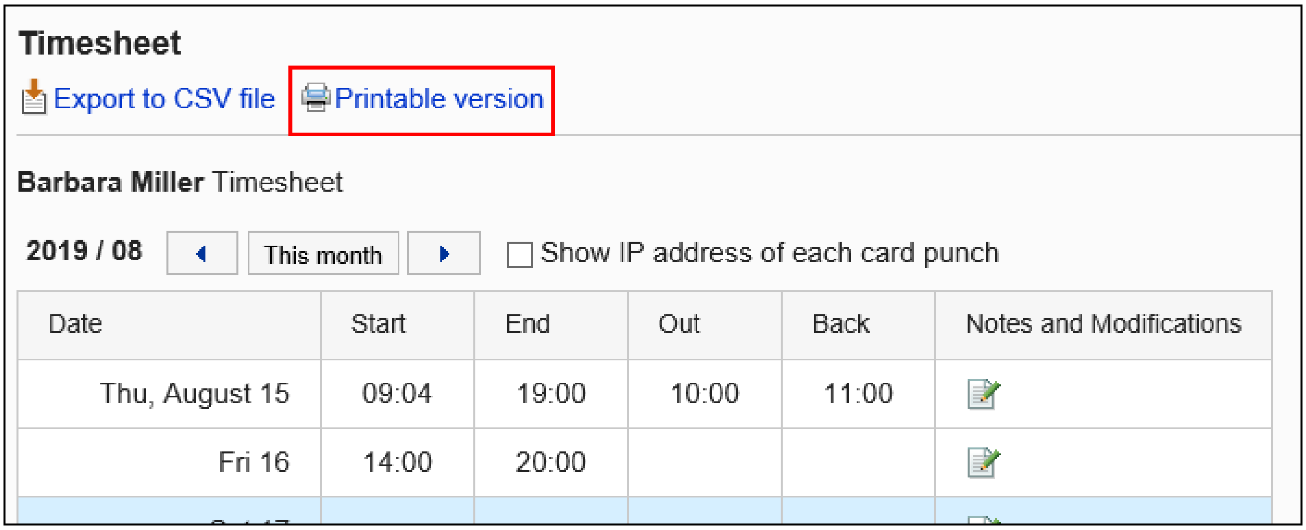
4. **Click "Timecard".**

5. **Click "Timesheet List".**

6. **On the "Timesheet list" screen, select an organization and click the Month.**



7. **On the "Timesheet" screen, click "Print Screen".**



8. **On the print settings screen, set the required items.**

- Character Size:

  Select the text size you want to print.

- Locale:

  Set the format for displaying date and time.

  Select either of the locale for the user or the locale for printing.

  For details on locales, refer to how to set the locale for printing(564Page).

- Punch Information Display
  Determines whether to print the IP address of the user where the time is recorded in the timecard.
  To print IP addresses, select the "Show IP addresses" check box.

9. Click "Print" to print the timesheet using the print feature of the Web browser.

2.10.3. Managing Timesheets Using CSV Files

Export timesheets of selected users to a CSV file.
The following items are exported to the CSV file

- Login name
- User name
- Punched date
- Start time
- IP address of start time
- End time
- IP address of end time
- Out time
- IP address of out time
- Back time
- IP address of back time
- Remarks

Note

- The timesheets exported to a CSV file cannot be imported to Garoon.
- Out of office and back are exported as many times as you have set for "out of office/back maximum" on the "General settings" screen.
  For details on the out and back settings, refer to how to set the maximum number of out-of-office/return(1092Page).

Exporting Each User's Data to a CSV File

Export the data from the timesheet of the selected users to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

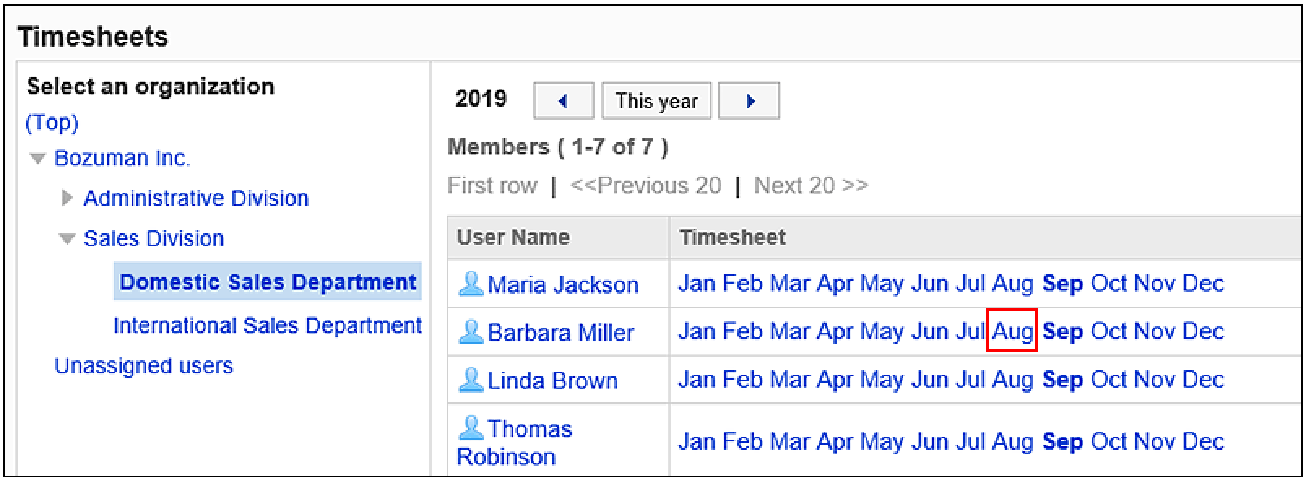
2. Click "System settings".

3. Select "Application settings" tab.

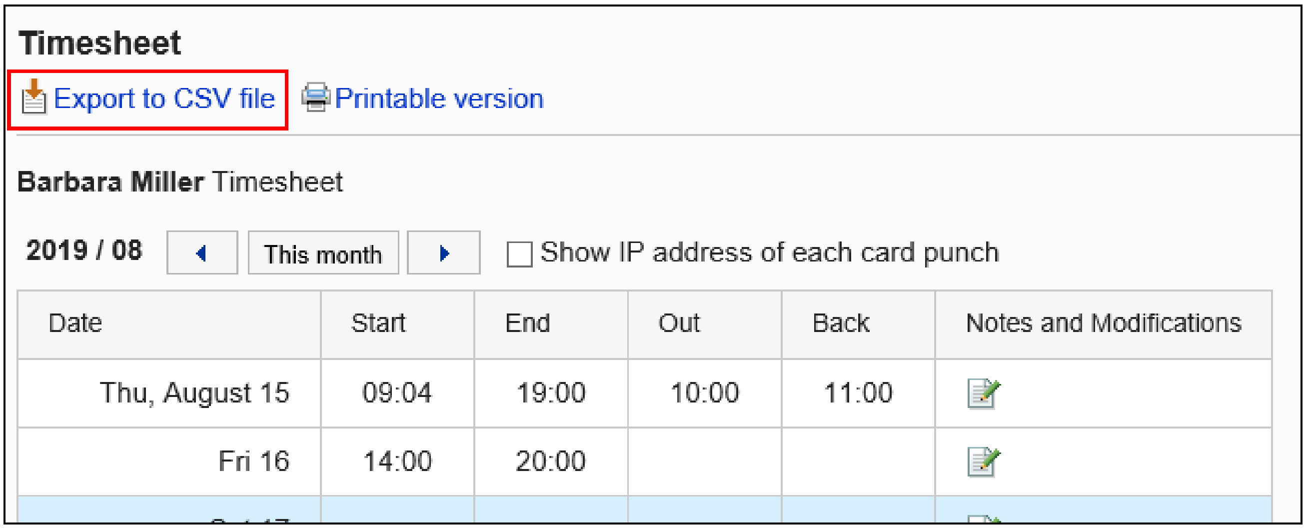
4. Click "Timecard".

5. Click "Timesheet List".

6. On the "Timesheet list" screen, select the organization and the month of the user you want to export.



7. On the "Timesheet" screen, click "Export to CSV file".



8. On the "Export timecard" screen, set the required items for the exported data.

The setting fields are as follows:

- Period to export:

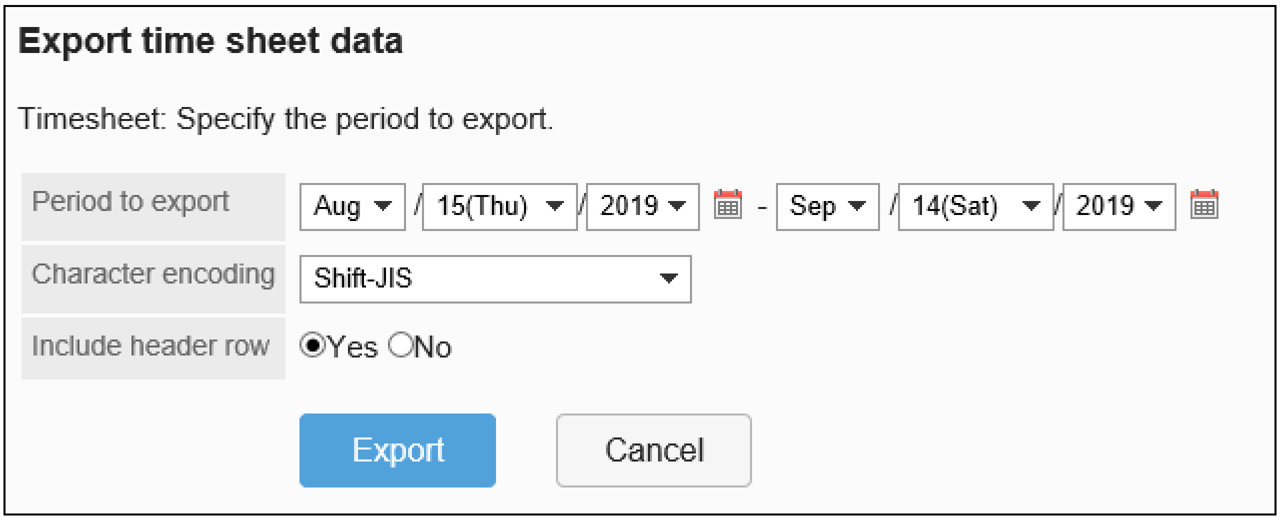
  Select the range of data you want to export.
- Character encoding:

  Select the character code that you want to use for encoding.

  Following character codes can be selected.
  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".



9. **Confirm your settings and click "Export".**

10. **Save the file with a function provided by your Web browser.**

Exporting Multiple User Data to a CSV File

Exports the data from the timecard of the selected users to one CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

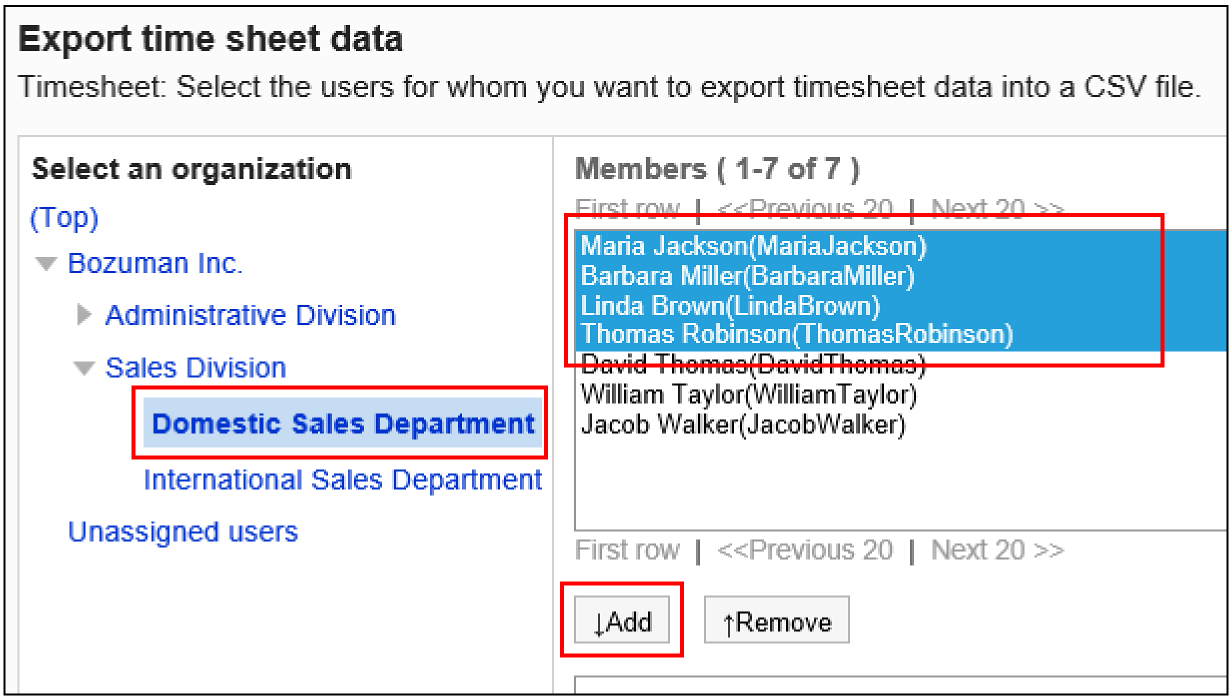
2. **Click "System settings".**

3. **Select "Application settings" tab.**

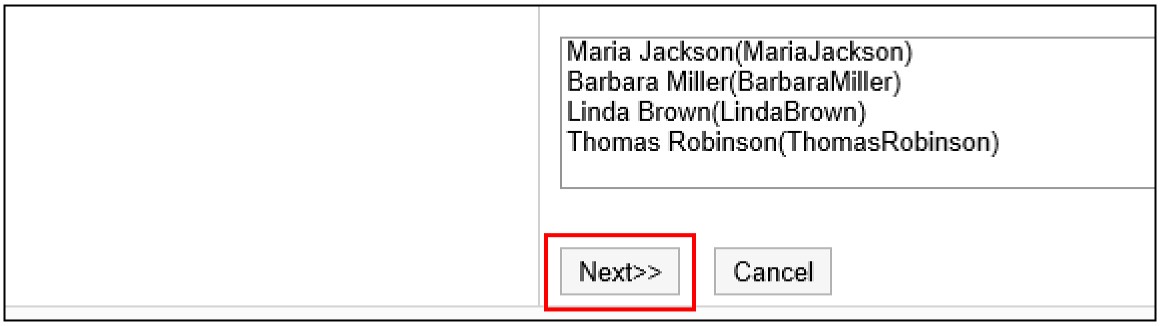
4. **Click "Timecard".**

5. **Click Export Timecard.**

6. **On the "Export timecard" screen, select the organizations and users who you want to export, and then click "Add".**



7. **Click "Next".**



8. On the "Export timecard" screen, set the required items for the exported data.

The setting fields are as follows:

- Period to export:

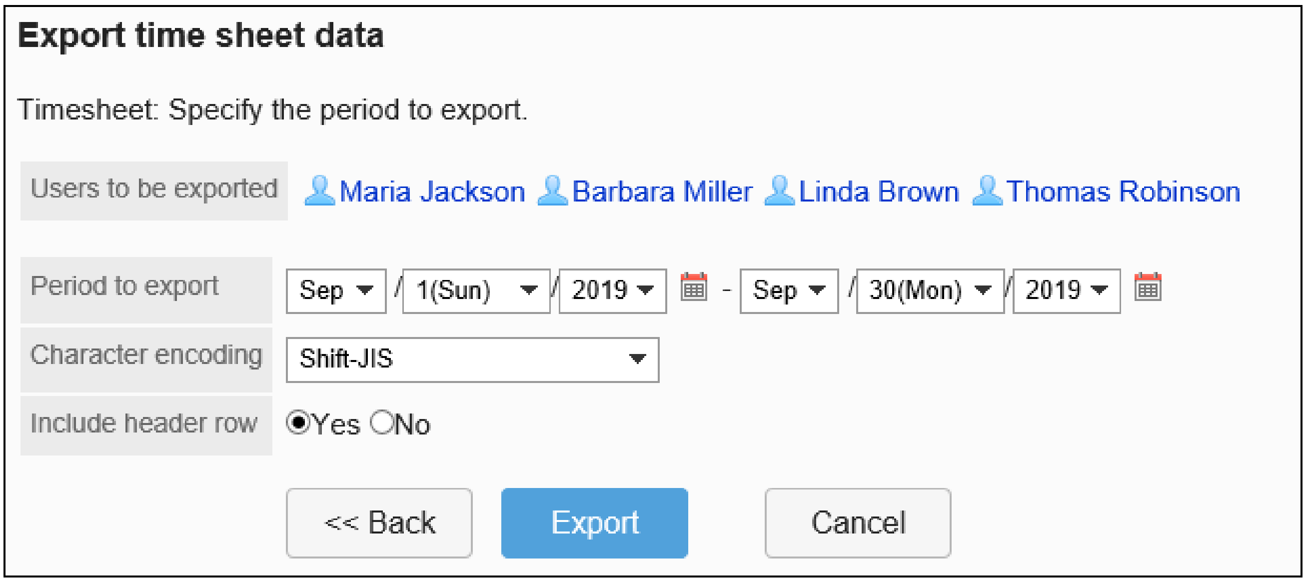
  Select the range of data you want to export.
- Character encoding:

  Select the character code that you want to use for encoding.

  Following character codes can be selected.
  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".



9. Confirm your settings and click "Export".

10. Save the file with a function provided by your Web browser.

2.11. Address Book

"Address Book" is an application that manages company or personal contacts and addresses.

"Shared Address Book", which allows users to share addresses with other users, "Personal Address Book" and "User list" to display users who have been added to Garoon.

Shared address books consist of "books", which summarize address data by purpose.

If you have added account address data to a book, you can create an e-mail by quoting data in the book, or enter the company name of the report.

System administrators and application administrators can manage workbooks and set user rights in workbooks.

Caution

- **The display order of addresses in version 3.7 and later**

  Changed the order of addresses from Garoon in version 3.7 as follows

  - Version 3.5 or earlier: the Order of names

  - Version 3.7 or later: Name pronunciation order

If you want to display addresses in the same order as before the upgrade, change the pronunciation of the name.

References

- Book Settings(1107Page)
- Setting up an item in the Address Book(1112Page)
- Setting permissions for the Address Book(1125Page)
- Setting operational administrative privileges for workbooks(1135Page)
- User Rights settings for workbooks(1140Page)
- Adding addresses

2.11.1. Type of Address Book

Garoon has four address books.

- **My address groups**

  This feature allows you to group addresses that you use frequently, from user list, Personal Address Book, and shared Address Book.

The My address group is available only to users who have created it.

- **User List**

  User information registered in Garoon.

  You cannot add, change, or delete data on the User list.

  You cannot hide the list of users.

- **Personal Address Book**

  This is an address book that is used by users. Users can add, change, and delete any addresses in the Personal Address Book.

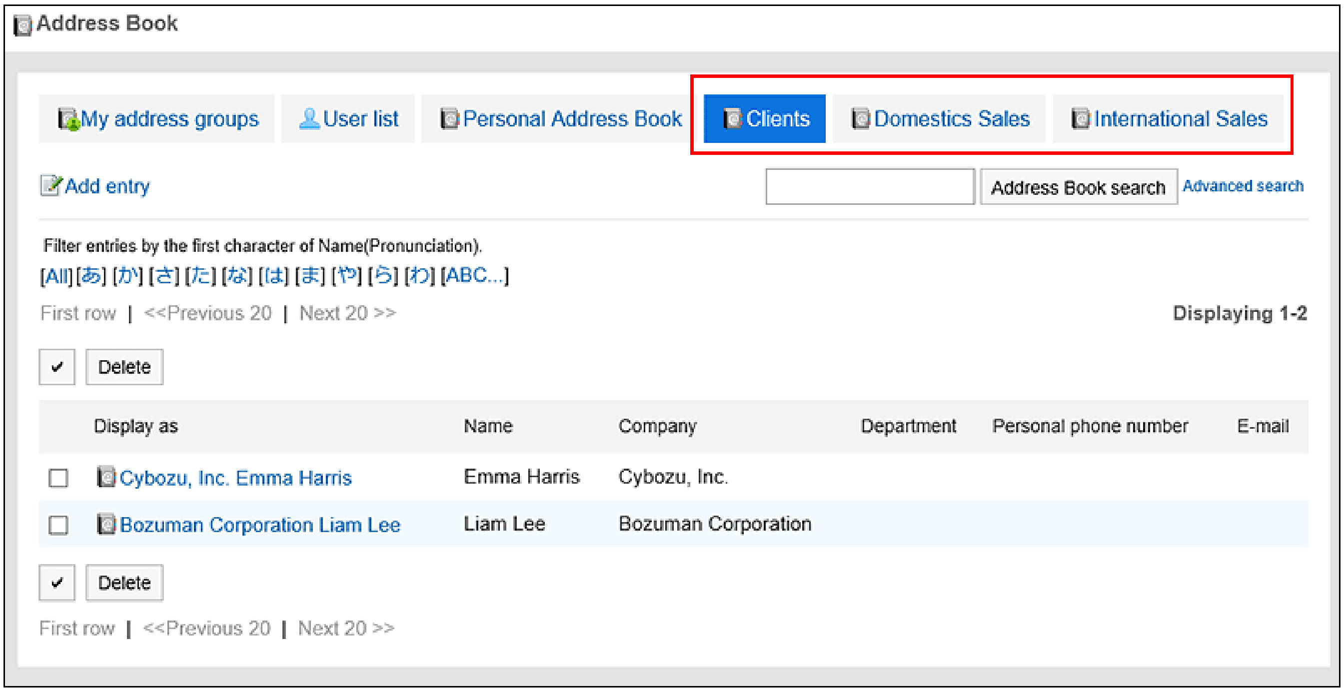
  The Personal Address Book cannot be shared with other users.

- **Shared Address Book**

  Shared address books consist of "workbooks" created by system administrators and application administrators. By summarizing the address data of business partners and affiliated companies and other users who can be shared within the company, you can prevent the creation of duplicate address data and easily search the target address data.

  Only system administrators and application administrators can add, edit, and delete workbooks.

  Users can add address data to each book.



Order of the Entries of User List and Address Book

- **Address Book:**

  You cannot change the order of the address book entries.

  The address is sorted by the "Name (Pronunciation)".

  If "Name (Pronunciation)" has not been set, it is sorted by the "Display name".

- **User list:**

  You cannot change the order of the user list entries.

The user list entries are sorted by display order.

If the display order is the same, it is sorted by the order in which users were registered.

2.11.2. Book Settings

The shared Address book configures the address information for each book.

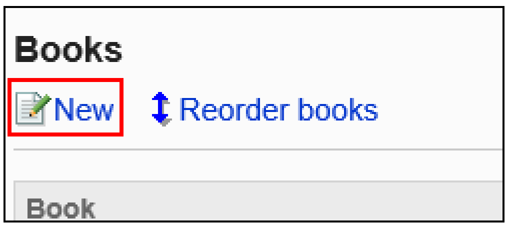
You can add multiple workbooks.

Adding Books

Add a workbook to be used as a shared address book. You can add multiple workbooks.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Book list".**
6. **On the "book list" screen, click "Create Book".**



7. **On the "Add book" screen, enter the name of the book.**

Always set a standard book name.

You can set the name of a book in multiple languages by clicking "Set the display name for each language".

If you do not set the name of the language that is set by the user, the default book name is displayed.

The following languages can be set:

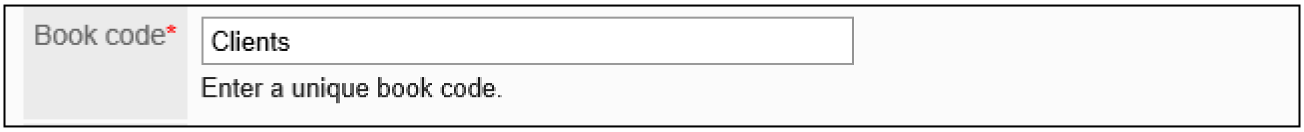
- 日本語
- English
- Simplified Chinese
- Traditional Chinese

  Displayed in Traditional Chinese.

8. **Enter the "Book Code" field**

Always set the book code.

Unique code for identifying workbooks



9. **In the "Book Type" field, select "Standard Database".**

By default, "Standard database" has been set. You do not need to change this.

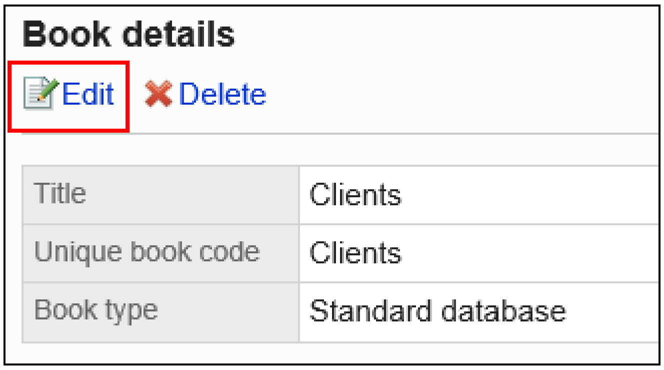
10. **Confirm your settings and click "Add".**

Changing Books

Change the workbook name and the book code in the shared Address Book.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Book list".**
6. **On the "book List" screen, select the book that you want to change.**
7. **On the "book details" screen, click "Edit".**



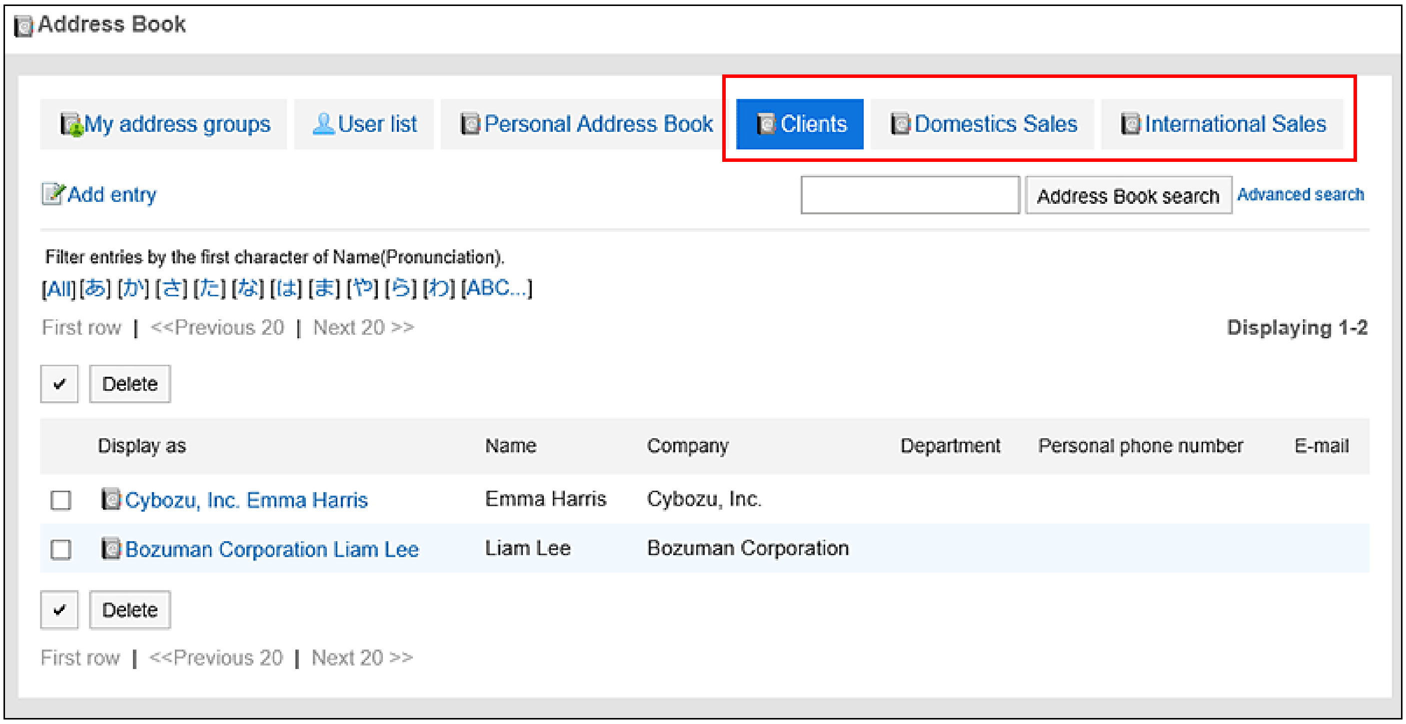
8. **On the "Edit book" screen, you can change the fields as necessary.**
9. **Confirm your settings and click "Save".**

Note

- If you want to change the item name and item code of a customized item that has been set for the workbook, refer to how to change the custom item(1117Page).

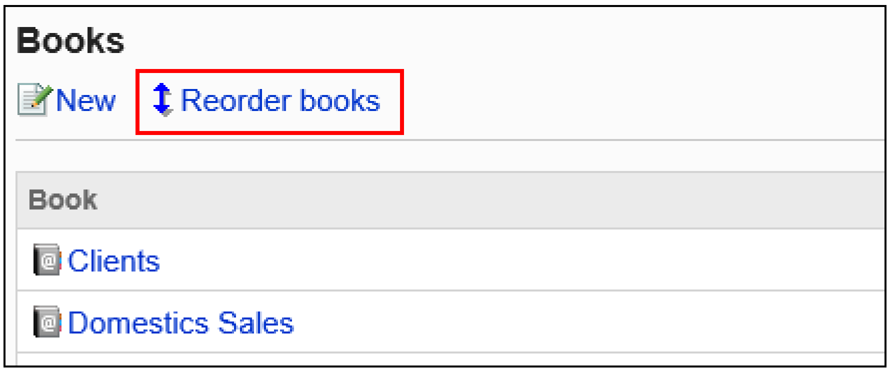
Reorder Books

Reorder the workbooks in the shared Address Book.
Only shared address books can be changed. You cannot change the order in which the My address group, user list, and Personal Address Book are displayed.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Book list".**
6. **On the "book list" screen, click "Reorder Books".**



7. **On the "Reorder books" screen, reorder the books.**
8. **Confirm your settings and click "Save".**

Deleting Books

Delete the shared Address book. Only shared address books can be deleted.

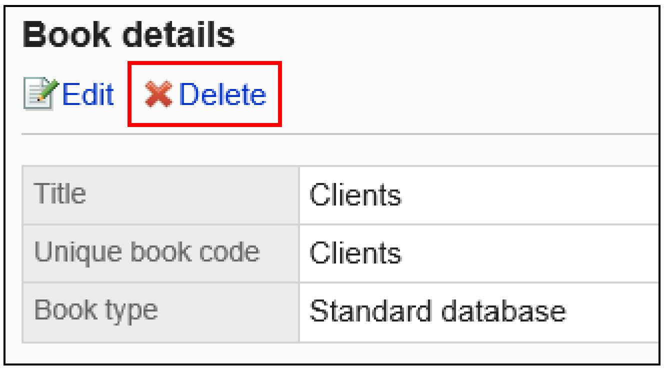
When you delete a book, the addresses that you have added to the workbook are also deleted.

Caution

- Deleted workbooks and addresses cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Book list".**
6. **On the "book List" screen, select the book you want to delete.**
7. **On the "book details" screen, click "Delete".**



8. Click "Yes" on the "Delete books" screen.

2.11.3. Setting up Items in Address Books

Set up items in the shared Address Book.

The shared Address book has two types of fields:

- Built-in items:
  These items are set by default. You can set whether to use items and whether to display items in the Address Book.
  The built-in items are as follows.
  - Name
    Cannot change the "Display Name" field.
  - Name of individual
  - Pronunciation
  - Company Name
  - Company Name (pronunciation)
  - Division Name
  - Zip code
  - Address
  - Route
  - Office Phone Number
  - Company FAX Number
  - URL
  - Job Title
  - Personal Phone Number
  - E-mail
  - Picture
  - Notes
- Custom Items:
  These items are added by your system administrator if necessary.

Adding Items in the Address Book

Add a customization item to the Personal Address Book or shared Address Book.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

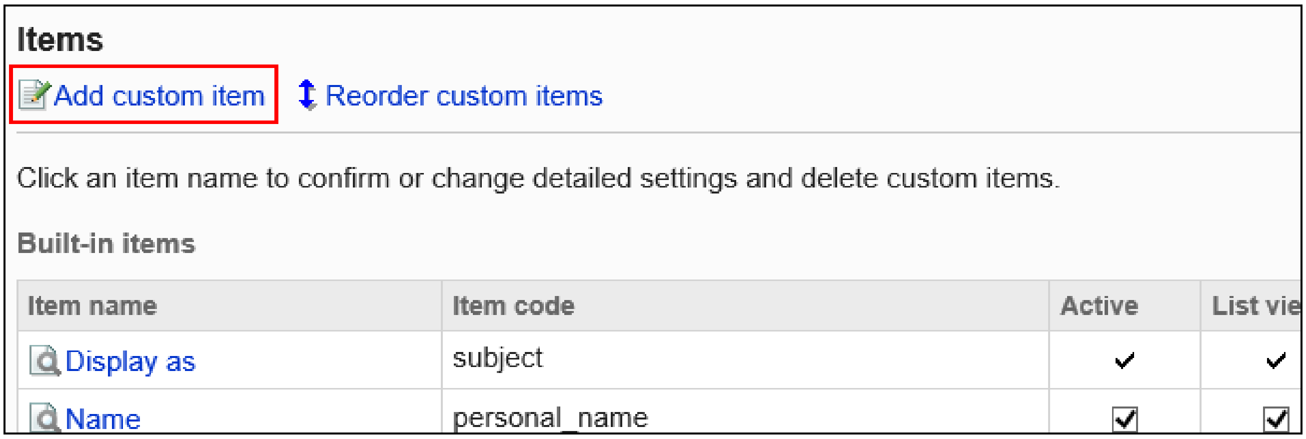
3. Select "Application settings" tab.

4. Click "Address Book".

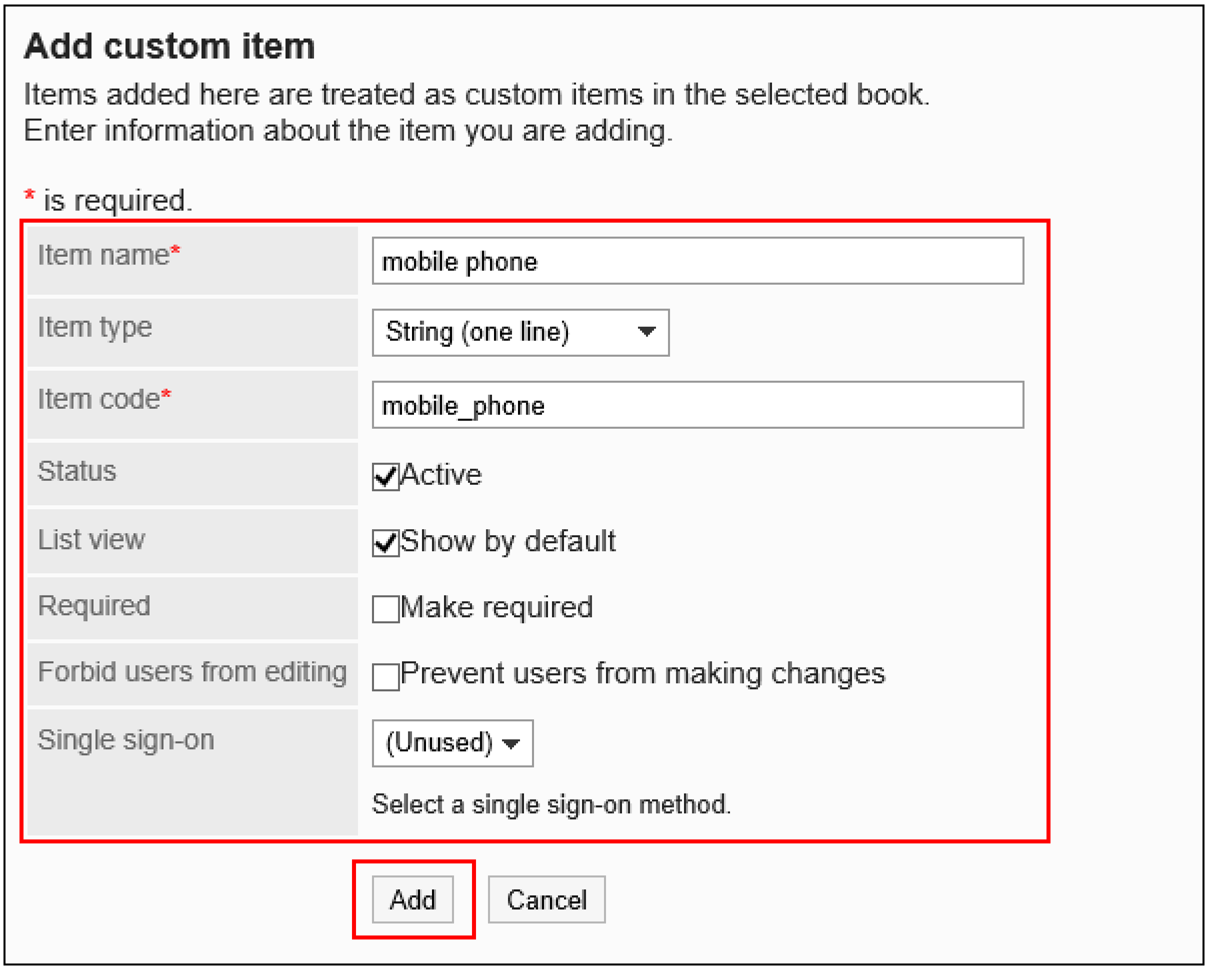
5. Click "Item Settings".

6. On the "Item Settings" screen, select the book for which you want to add an item.

7. On the "Item List" screen, click "Add Customization".



8. On the "Add Customization Items" screen, set the required items, and click "Add".



Items in the Address Book

Set the following items:

Item	Description
Item name	Enter the display name of the item. You cannot change item names of built-in items.
Type	Select an item type. You cannot change the type of an item in a built-in item. When you set a custom item, you can select from the following item types. • **String (one line)** You cannot enter line breaks in it. • **String (Multiline)** You can enter line breaks in it. • **URL:** This item type is for entering an URL of a Web site. • **Image URL** This item type is for entering an URL where you want to save the image file.

Item	Description
	• **E-mail:** This item type is for entering an e-mail address. By specifying this item type, you can work with e-mail software. • **File:** This item is used for attaching files to the Address Book. • **IP Phone:** This item type is for entering IP phone numbers. By setting this item type, you can work with IP phone function.
Item code	This is a unique code for identifying an item. You cannot change item codes for built-in items.
Use	Select whether to use as an entry field in the Address Book.
List view	Select whether to display items in the "Address Book" screen. If you clear the "Show as standard" check box, the item is displayed on the "Address details" screen.
Required Field	Select whether to make the item mandatory.
Users cannot change settings	Select whether to allow users to change settings.
Single Sign-On	Select this to include user profile items in the login information used to log in with single sign-on to another system. Select from the configured single sign-on. The Single Sign-On cannot be specified for the following built-in items. • Route • URL • Picture If you have selected the following item types for custom items, you cannot set the Single Sign-On. • Files • URL • Image URL For details, see Single Sign-On Settings(196Page).

9. Confirm your settings and click "Add".

Note

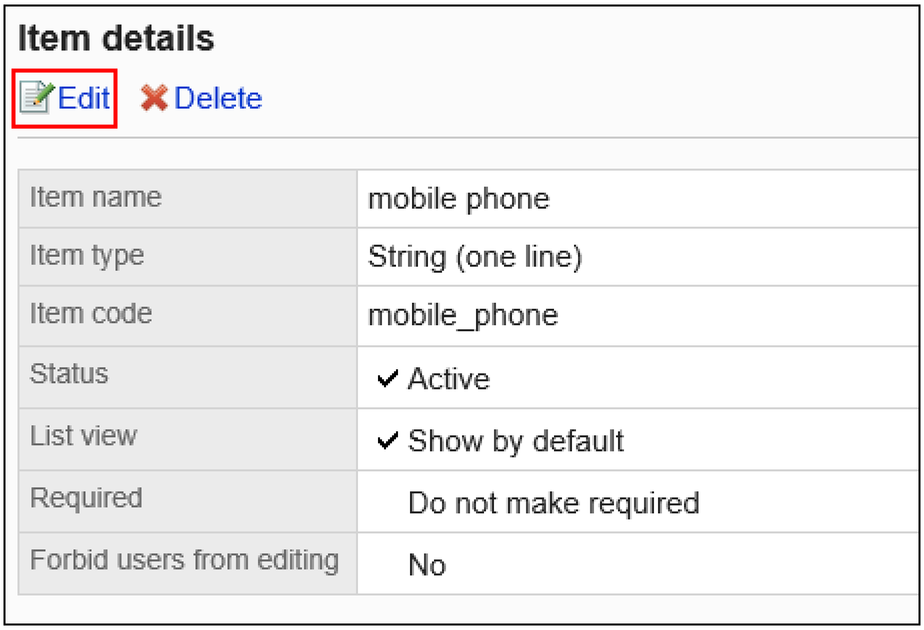
- If the "Make required items" and "User cannot change" check boxes are selected, an error does not occur when the value of an item is saved in the user screen.
- Items that cannot be changed by users can be managed using a CSV file.
  For details, refer to Managing Address Books Using a CSV file(1150Page).

Changing Items in the Address Book

Modifies an item in the Address Book.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Item Settings".**
6. **On the "Item Settings" screen, select a book.**
7. **On the "Item List" screen, click the item name of the item you want to change.**
8. **On the item details screen, click "Save".**



9. On the "Edit Item" screen, change the fields as necessary.

For details on setting items, refer to item settings in the Address Book.

10. Confirm your settings and click "Save".

Changing the Settings of Items in the Address Book in Bulk

You can change all items in the Address Book in bulk.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

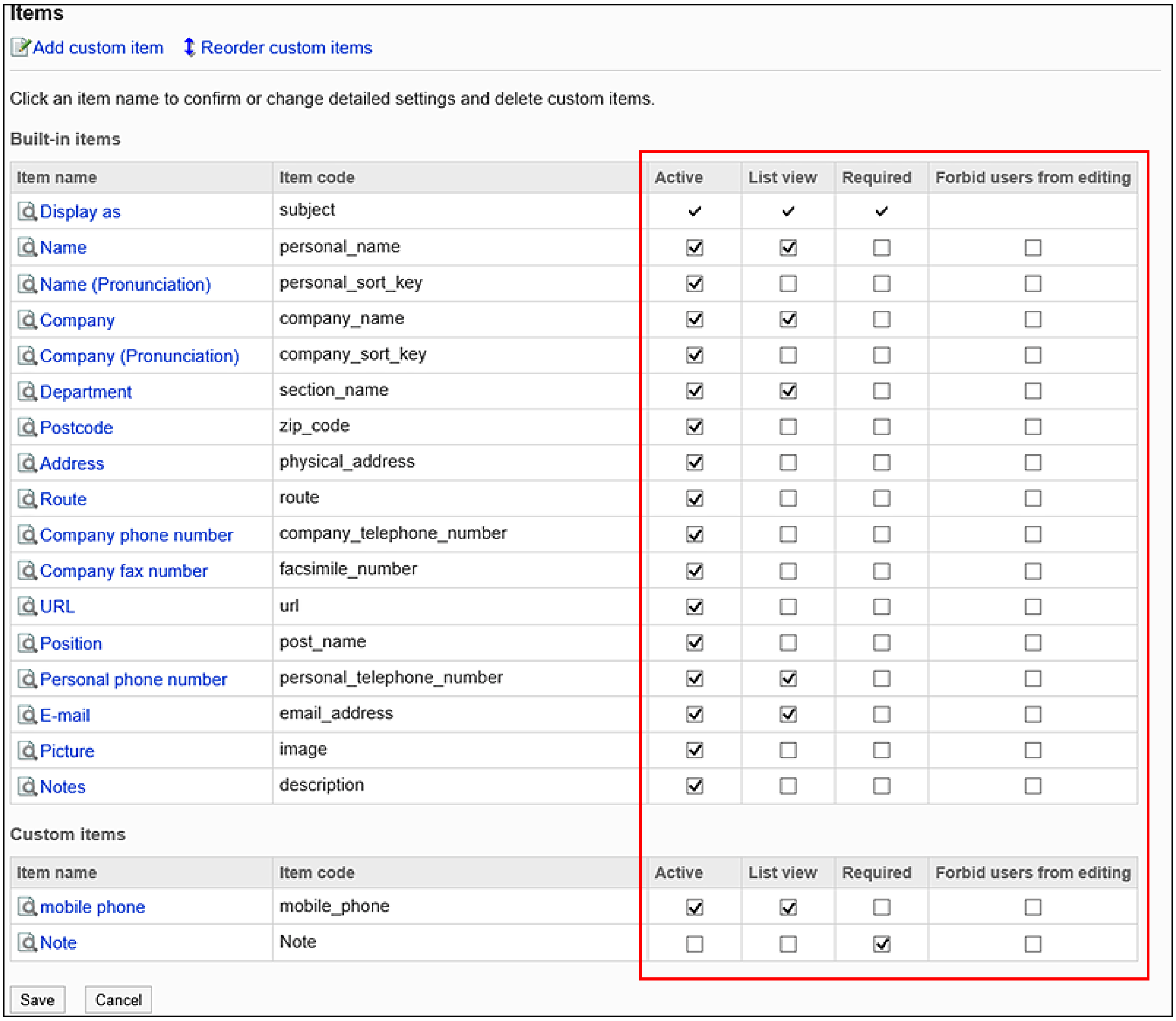
3. Select "Application settings" tab.

4. Click "Address Book".

5. Click "Item Settings".

6. On the "Item Settings" screen, select a book.

7. On the "Item List" screen, select the check box of the item for which you want to change the settings, and then click "Save".


Items

Add custom item Reorder custom items

Click an item name to confirm or change detailed settings and delete custom items.

Built-in items

Item name	Item code	Active	List view	Required	Forbid users from editing
Display as	subject	✓	✓	✓	
Name	personal_name	☑	☑	☐	☐
Name (Pronunciation)	personal_sort_key	☑	☐	☐	☐
Company	company_name	☑	☑	☐	☐
Company (Pronunciation)	company_sort_key	☑	☐	☐	☐
Department	section_name	☑	☑	☐	☐
Postcode	zip_code	☑	☐	☐	☐
Address	physical_address	☑	☐	☐	☐
Route	route	☑	☐	☐	☐
Company phone number	company_telephone_number	☑	☐	☐	☐
Company fax number	facsimile_number	☑	☐	☐	☐
URL	url	☑	☐	☐	☐
Position	post_name	☑	☐	☐	☐
Personal phone number	personal_telephone_number	☑	☑	☐	☐
E-mail	email_address	☑	☑	☐	☐
Picture	image	☑	☐	☐	☐
Notes	description	☑	☐	☐	☐

Custom items

Item name	Item code	Active	List view	Required	Forbid users from editing
mobile phone	mobile_phone	☑	☑	☐	☐
Note	Note	☐	☐	☑	☐

Save Cancel

Reorder Items in the Address Book

Reorder custom items in the Address Book.

The custom items are displayed below the built-in items. Cannot reorder built-in fields.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

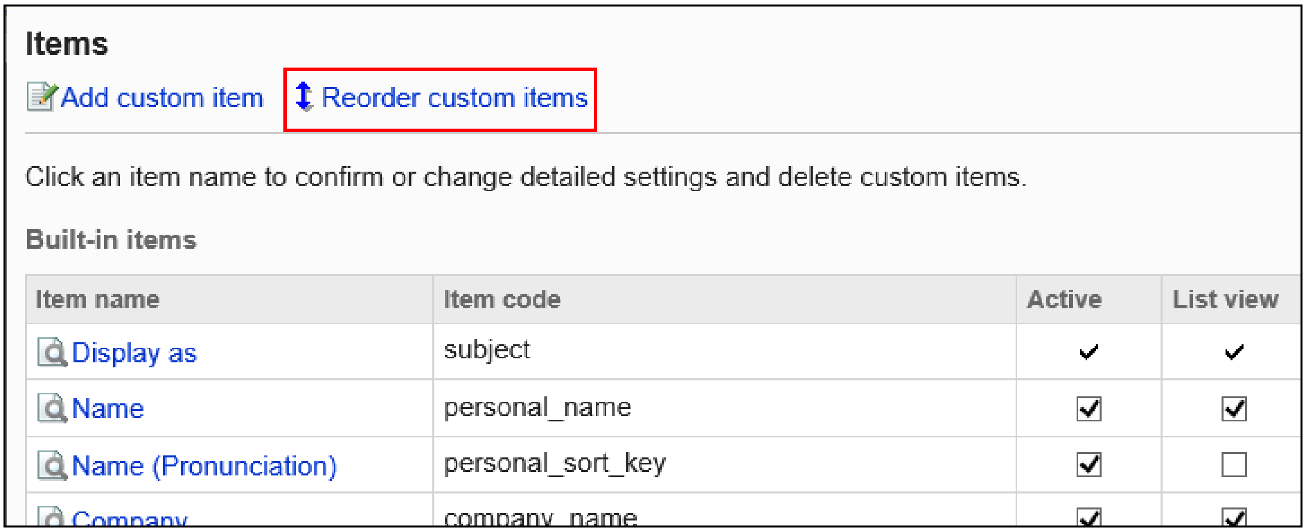
3. **Select "Application settings" tab.**

4. **Click "Address Book".**

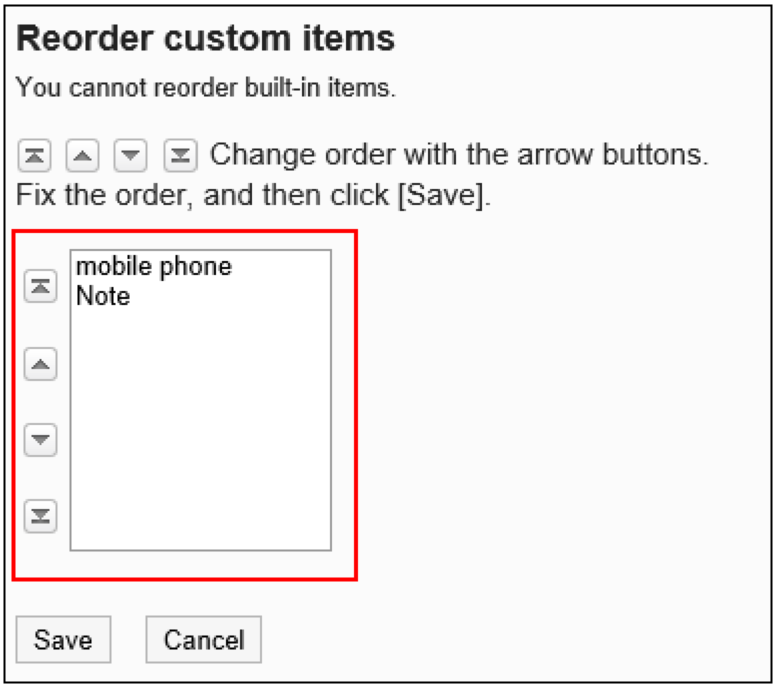
5. **Click "Item Settings".**

6. **On the "Item Settings" screen, select a book.**

7. **On the "Item List" screen, click "Reorder Custom Items".**



8. **On the screen to reorder custom items, reorder the custom items.**



9. **Confirm your settings and click "Save".**

Deleting Items

Delete custom items.

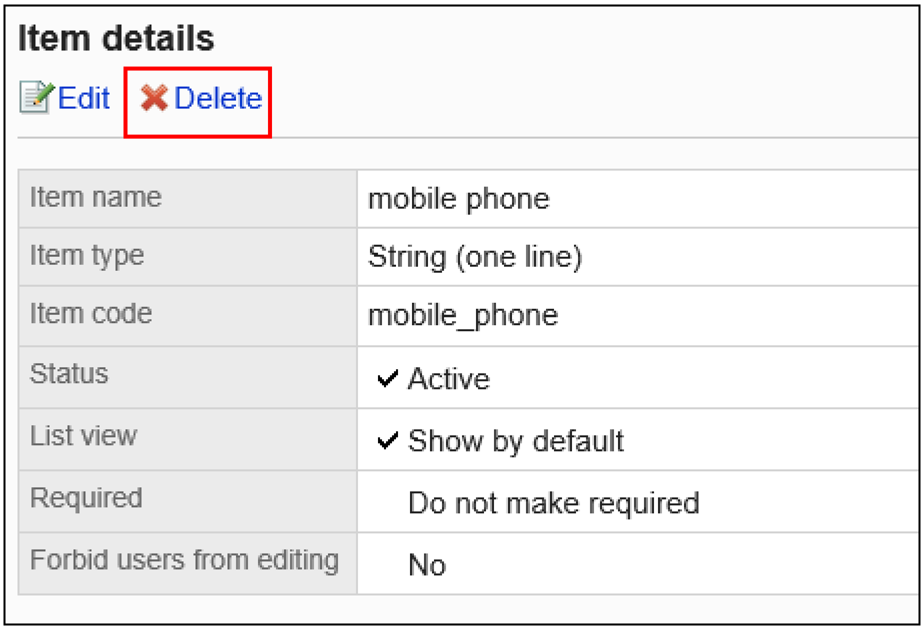
Built-in items cannot be deleted.

Caution

- If you delete a customization item, the contents of the item are also deleted from the Address book.
  Deleted custom items and information cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Item Settings".**
6. **On the "Item Settings" screen, select a book.**
7. **On the "Item List" screen, click the item name of the item you want to delete.**
8. **On the item details screen, click "Delete".**



9. Click "Yes" on the screen to delete items.

2.11.4. What Administrators and Users Can Do

Administrators and users who do not have administrative privileges can work in the Address Book.
If access rights are not restricted, you can do the following

For Administrators

Administrators can

User List

Action	System administrators	Screens for application administrators	Operational administrators
View	✔ Can be operated on the user screen.	✔ Can be operated on the user screen.	✔ Can be operated on the user screen.
Adding user Information	✔ If you change the user information in system administration, the change will be applied to the user list.		
Editing User Profile	✔ If you change the user information in system administration, the change will be applied to the user list.		
Reorder User Information	✔ If you change the user information in system		

Action	System administrators	Screens for application administrators	Operational administrators
	administration, the change will be applied to the user list.		
Deleting user information	✓ If you change the user information in system administration, the change will be applied to the user list.		

Shared Address Book

Action	System administrators	Screens for application administrators	Operational administrators
Create a book	✓	✓	
Changing books	✓	✓	
Item Settings	✓	✓	✓
Reorder books	✓	✓	
Deleting books	✓	✓	
User Rights Settings	✓	✓	✓
Adding addresses	✓ Can be operated on the user screen.	✓ Can be operated on the user screen.	✓ Can be operated on the user screen.
Changing addresses	✓ Can be operated on the user screen.	✓ Can be operated on the user screen.	✓ Can be operated on the user screen.
Deleting addresses	✓ Can be operated on the user screen.	✓ Can be operated on the user screen.	✓ Can be operated on the user screen.

Action	System administrators	Screens for application administrators	Operational administrators
Copying addresses to other workbooks	✔ Can be operated on the user screen.	✔ Can be operated on the user screen.	✔ Can be operated on the user screen.
Data input and output using CSV files	✔	✔	✔

For Users

Users who do not have administrative privileges can do the following

User List

Action	Users
View	✔
Adding addresses	
Changing addresses	
Reorder addresses	
Deleting addresses	

My Address Group

Action	Users
View [1]	✔
Add [1]	✔
Change [1]	✔
Reorder [1]	✔

Action	Users
Delete [1]	✔
Add addresses [2]	✔
Reorder addresses [2]	✔
Delete addresses [2]	✔

[1]: You can only use the My address group.

[2]: You can only add, edit, and delete addresses that have been added to the My address group, such as user list and personal Address Book.

For details, refer to My address group settings.

Personal Address Book

Action	Users
Adding addresses	✔
Changing addresses	✔
Deleting addresses	✔

Shared Address Book

Action	Users
Create a book	
Changing books	
Item Settings	
Reorder books	
User Rights Settings	
Adding addresses	✔
Changing addresses	✔

Action	Users
Deleting addresses	✔
Copying addresses to other workbooks	✔
Data input and output using CSV files	

2.11.5. Setting Permissions for the Address Book

For the Personal Address Book or shared address book, set the following permissions in the organization, user, or role level

- Permission

The permissions in the address book vary by security model.
The default setting is set to "REVOKE (All users have access except users on list)". This allows all users to use the Address Book.
For information on user rights, see User Rights(46Page) and Prioritized Access Permissions(51Page).

Caution

- Users who are allowed to use the shared Address Book can use all workbooks in the shared Address Book.
  If you want to limit the use of books, set the permissions.
  For details, refer to how to set permissions for books(1140Page).

Setting Permissions

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Address Book".**

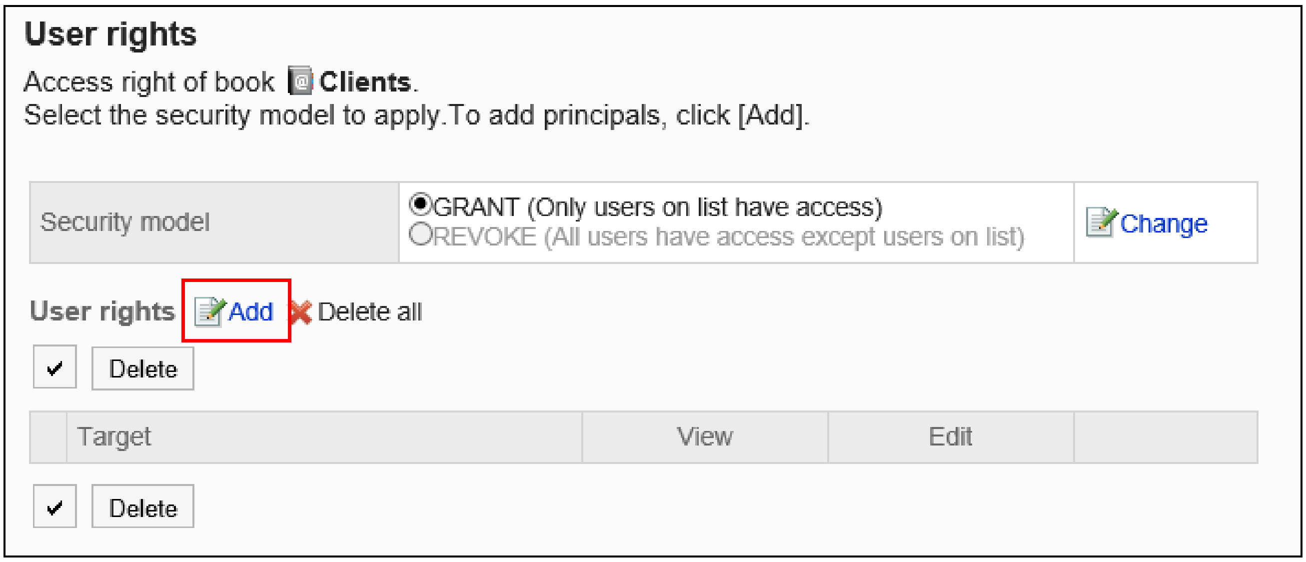
5. **Click "User Permissions".**

6. **On the "Permissions Settings" screen, confirm that "GRANT (select target allowed)" has been selected in the security model.**

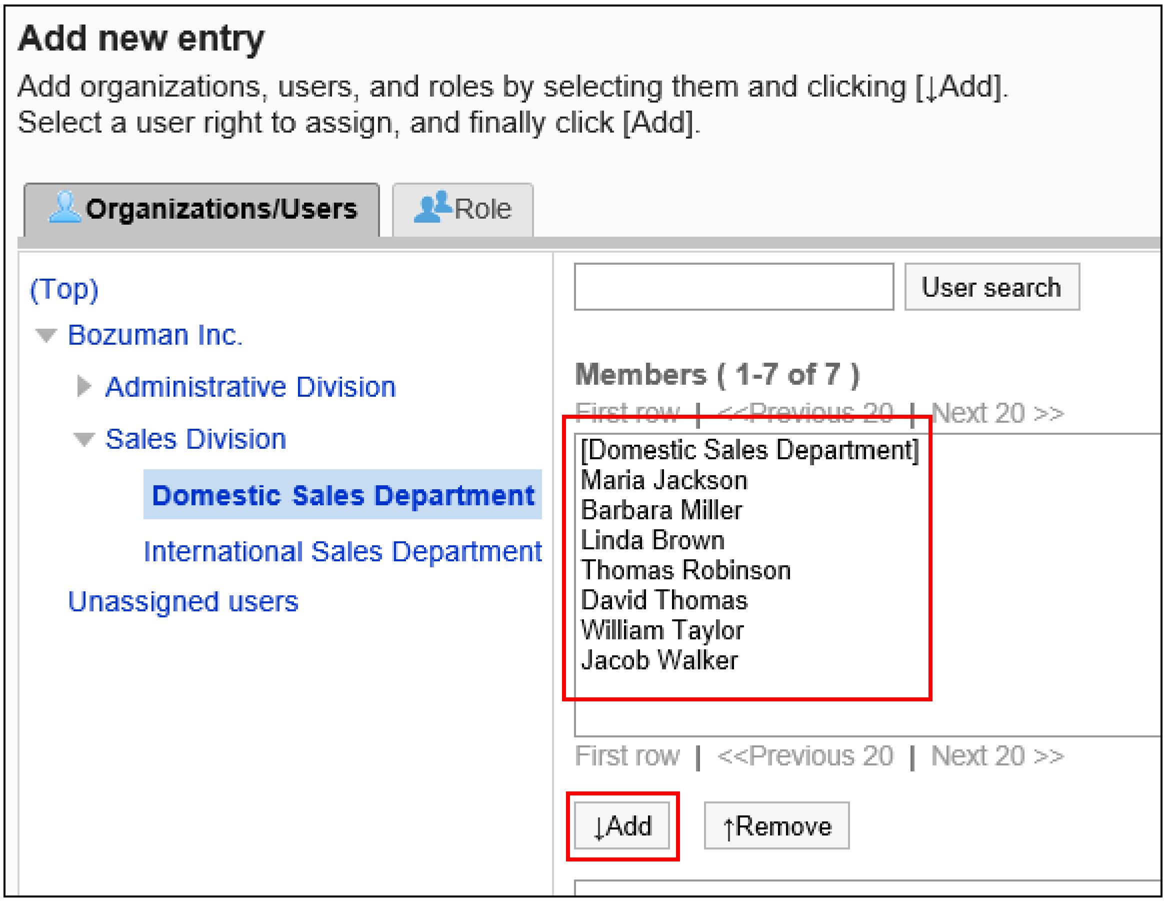
If the "REVOKE (select target for restriction)" option is selected, change to "GRANT (select target)".

For details, refer to Changing the Security Model(48Page).

7. **Click "Add".**



8. **On the "Add Permissions" screen, select the department, user, or role to set permissions, and then click "Add".**



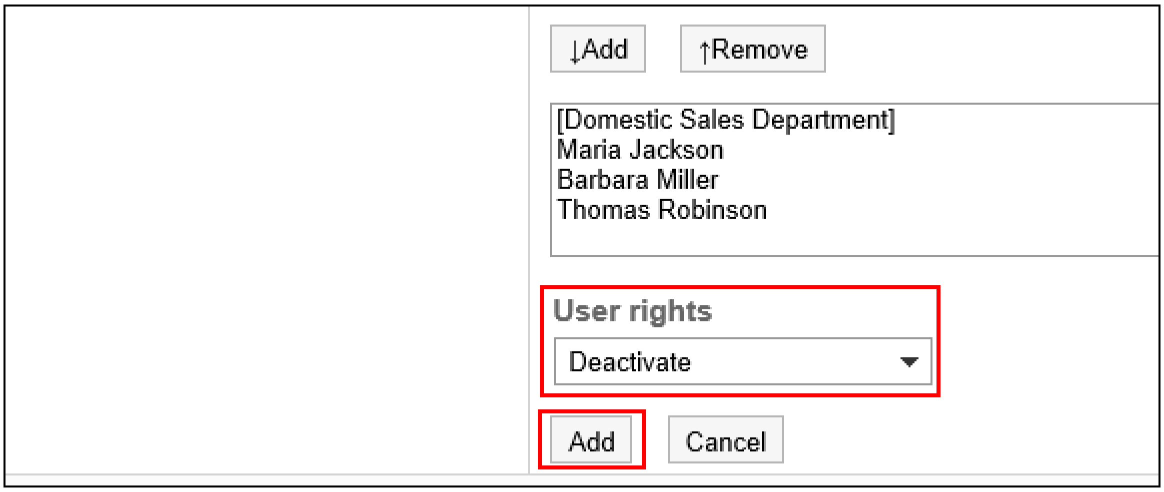
To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.

9. **Under "Add", select the address book you want to use, and click "Add".**

The following choices are displayed

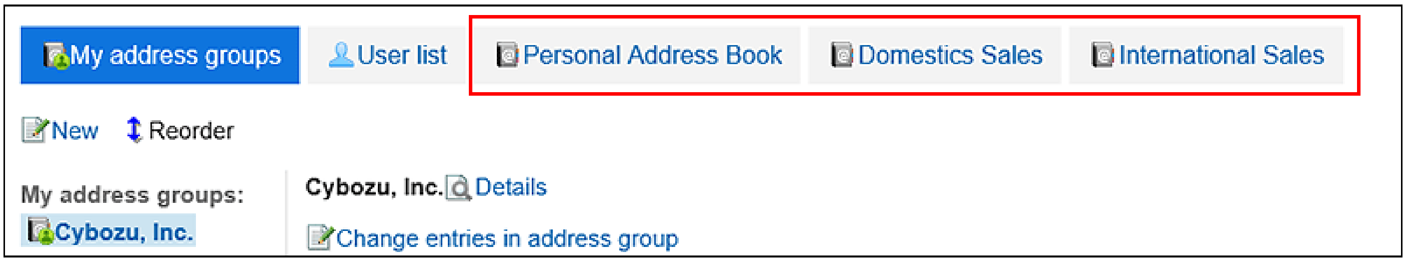
- Cannot be used.
- Shared Address Book only
- Personal Address Book only



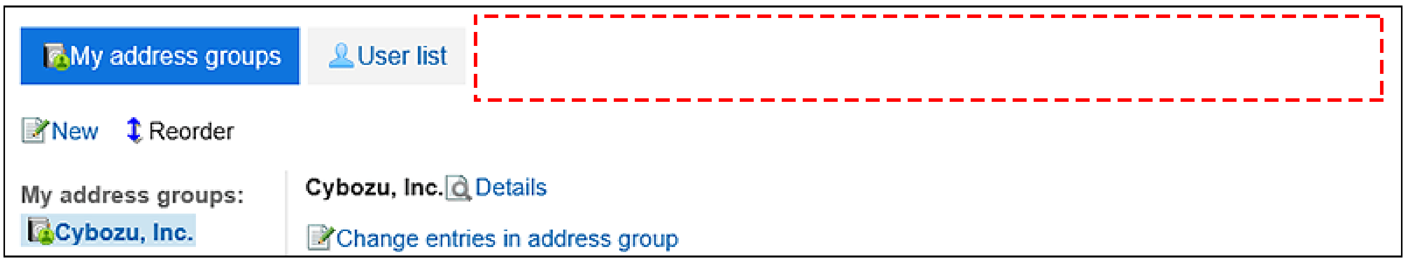
Combination of Permissions

If you limit the actions of the Address Book using permissions, the Personal Address Book and the shared address Book are displayed on the Address Book screen of the logged-in user.

User screens that can use both Personal Address Books and Shared Address Books:



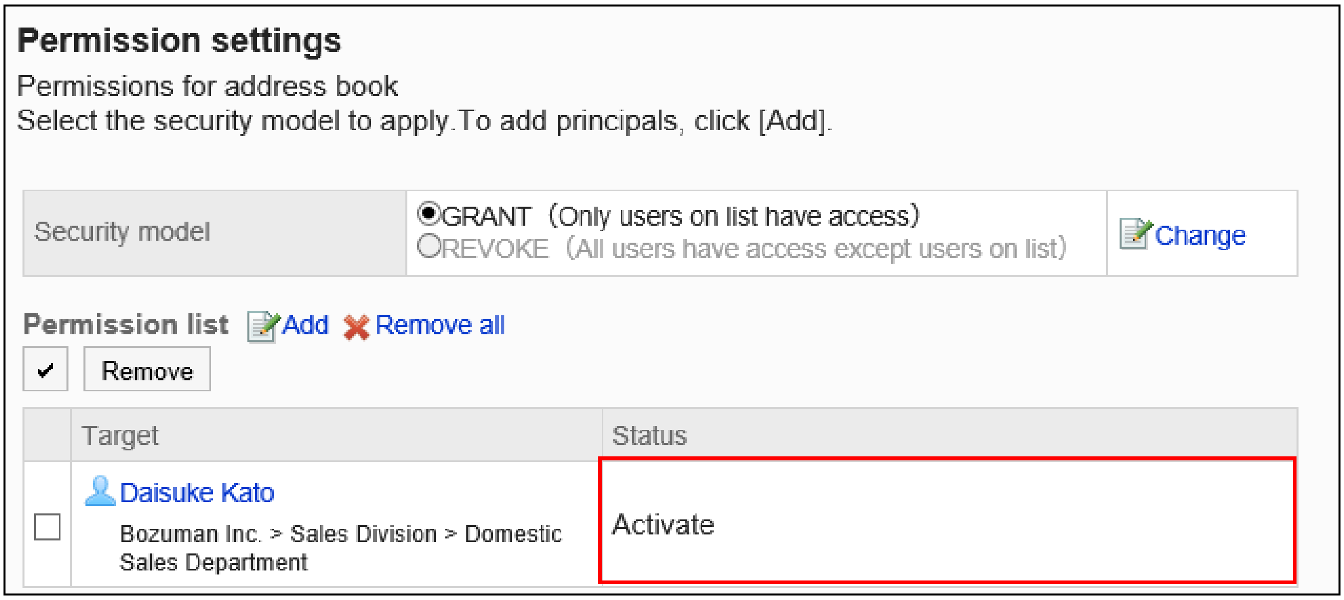
User screens that cannot use both Personal Address Books and Shared Address Books:



If the security model is "GRANT (Only users on the list have access)"

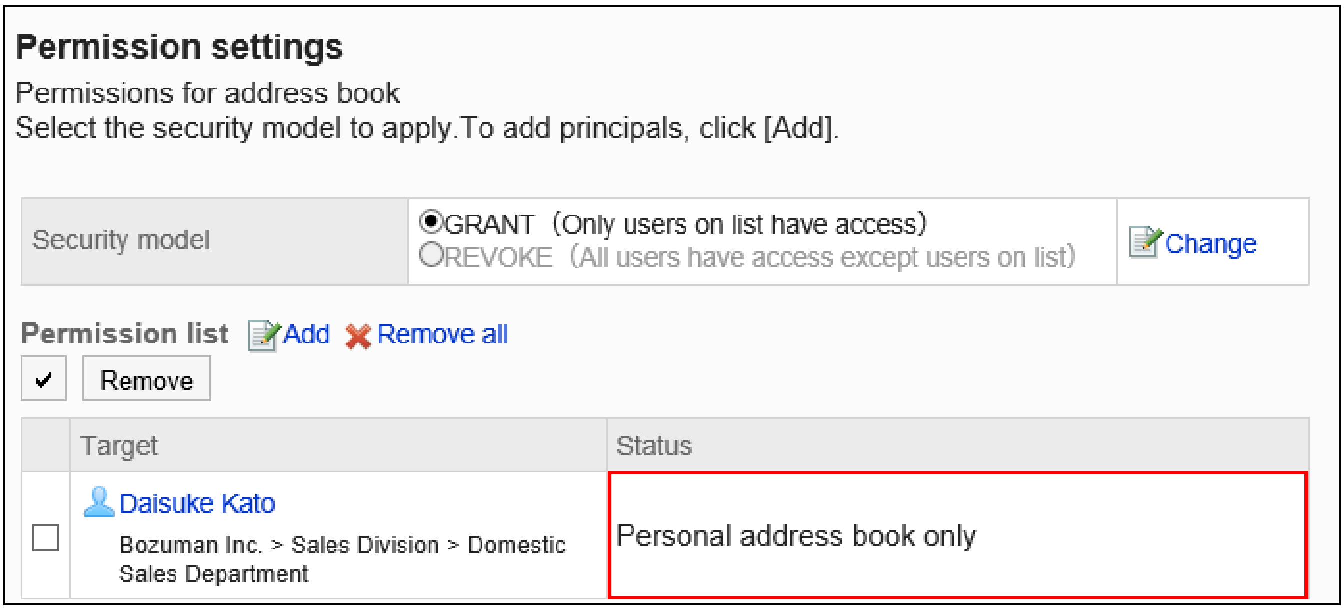
This section describes a security model of permission for Daisuke Kato as a "GRANT (selecting a target)" example.

- **Example of Allowing Daisuke Kato to Perform Actions on Both Personal Address Books and Shared Address Books:**
  Grant Daisuke Kato all permissions.



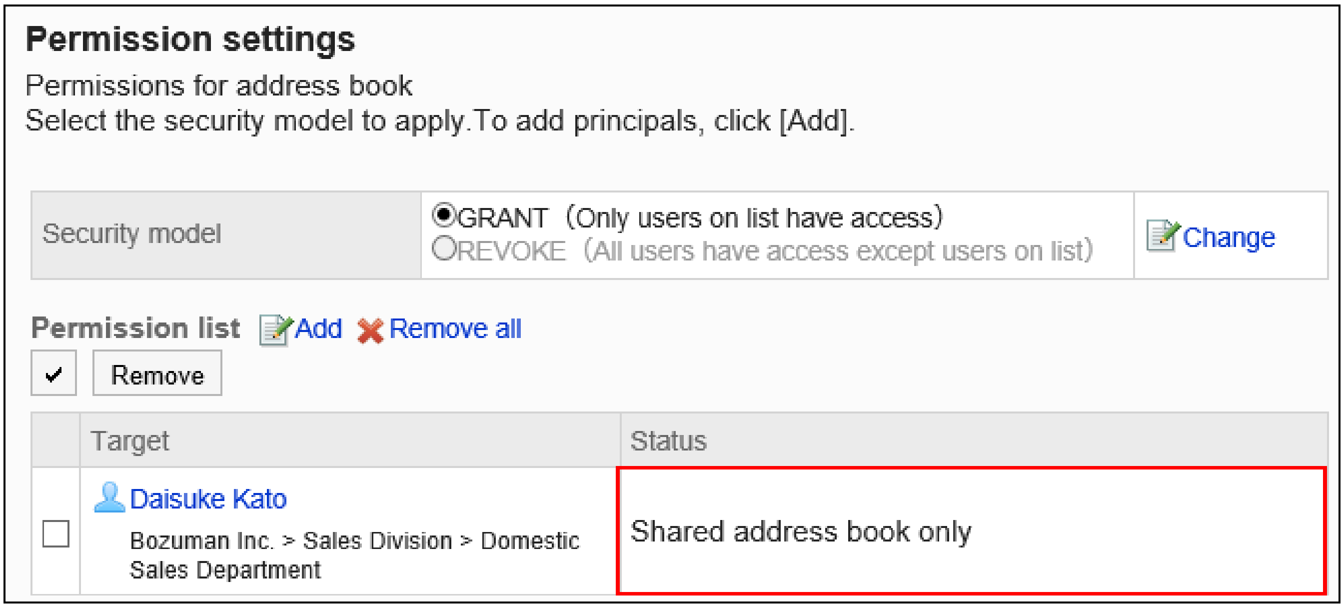
- **Example of Allowing Daisuke Kato to Perform Actions on Personal Address Books:**

  Grant Daisuke Kato permission only for the personal Address Book.



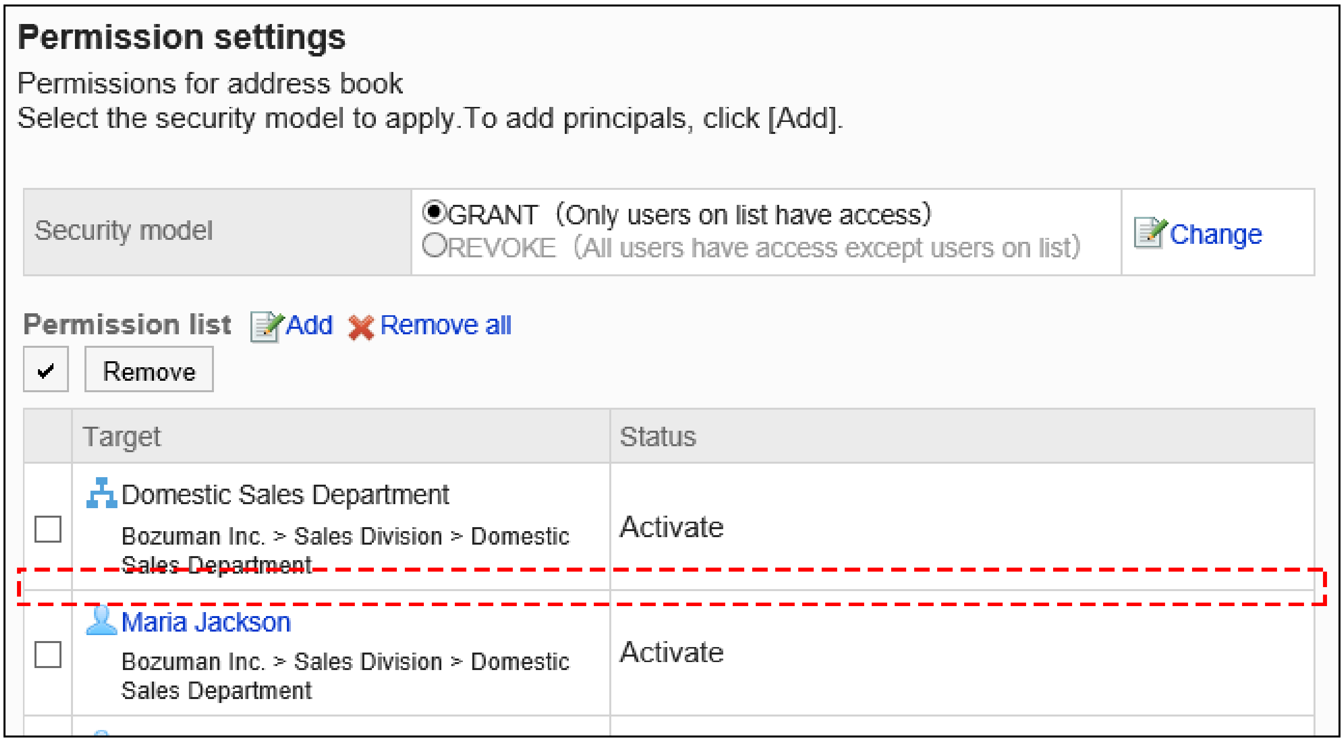
- **Example of Allowing Daisuke Kato to Perform Actions on Shared Address Books:**

  Grant Daisuke Kato permission only for shared address books.



- **Example of Prohibiting Daisuke Kato to Perform all Operations:**

  You can delete Daisuke Kato from the user rights list.

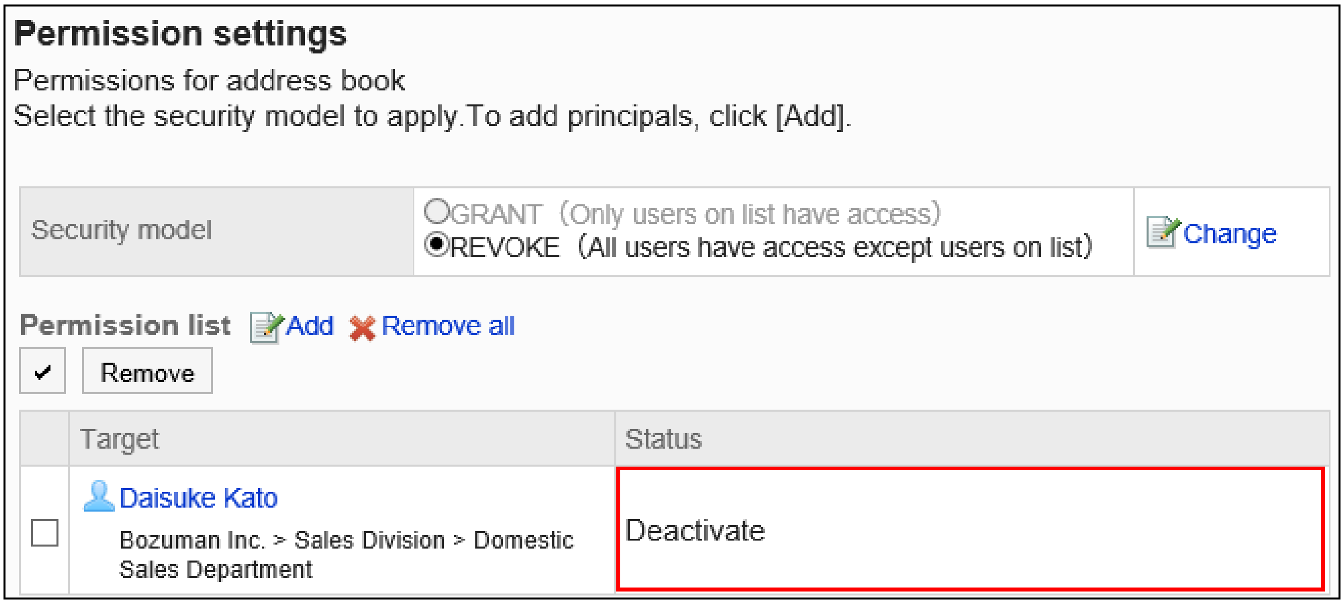


If the security model is "REVOKE (All users have access except users on the list)"

The security model of permissions for Daisuke Kato is described as an example of "REVOKE (selecting a restricted target)".

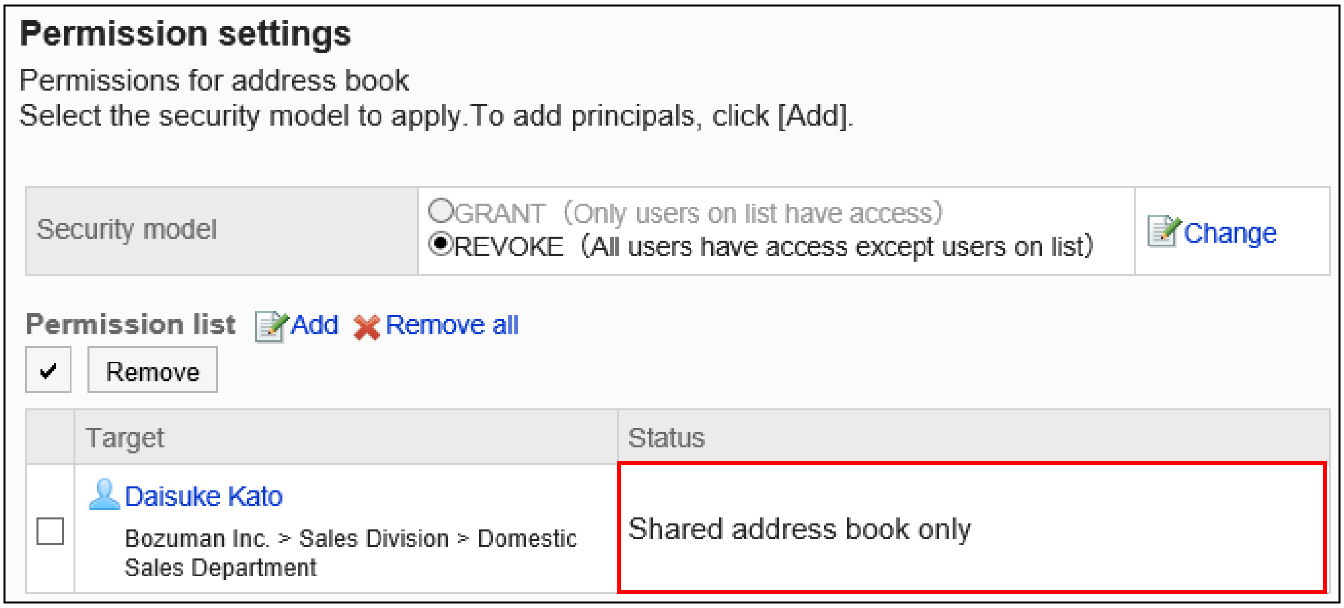
- **Example of Prohibiting Daisuke Kato to Perform Actions on Both Personal Address Books and Shared Address Books:**

  Grant the disabled permission to Daisuke Kato.



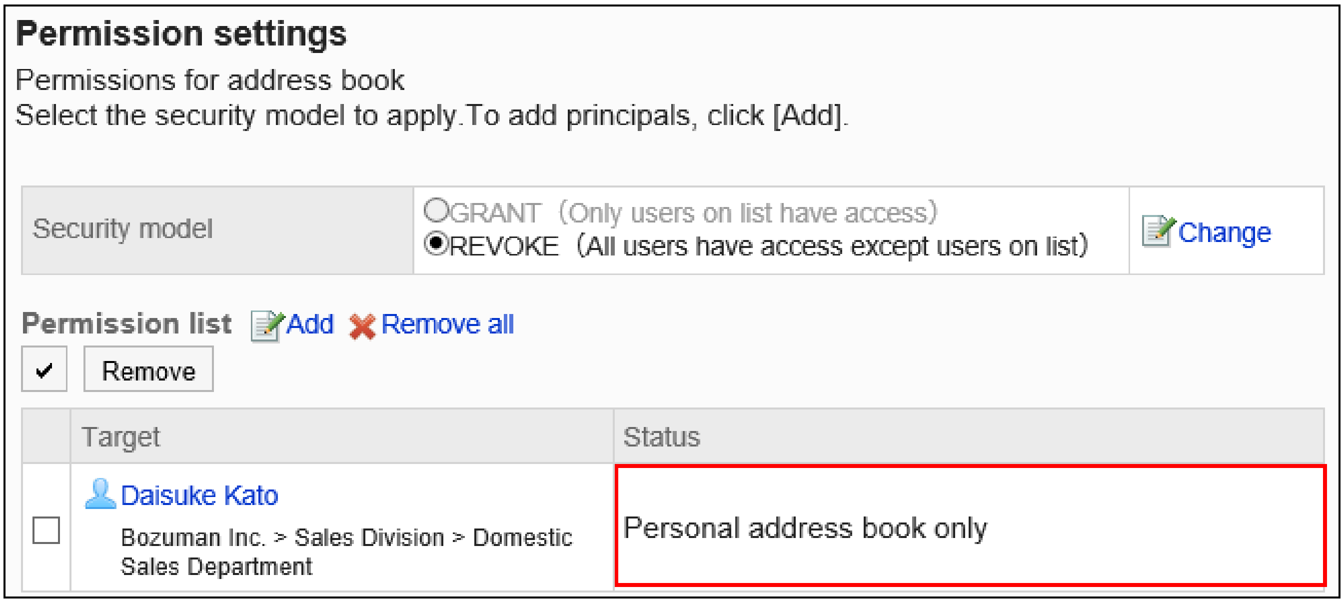
- **Example of Prohibiting Daisuke Kato to Perform Actions on Personal Address Books:**

  Grant Daisuke Kato permission only for shared address books.



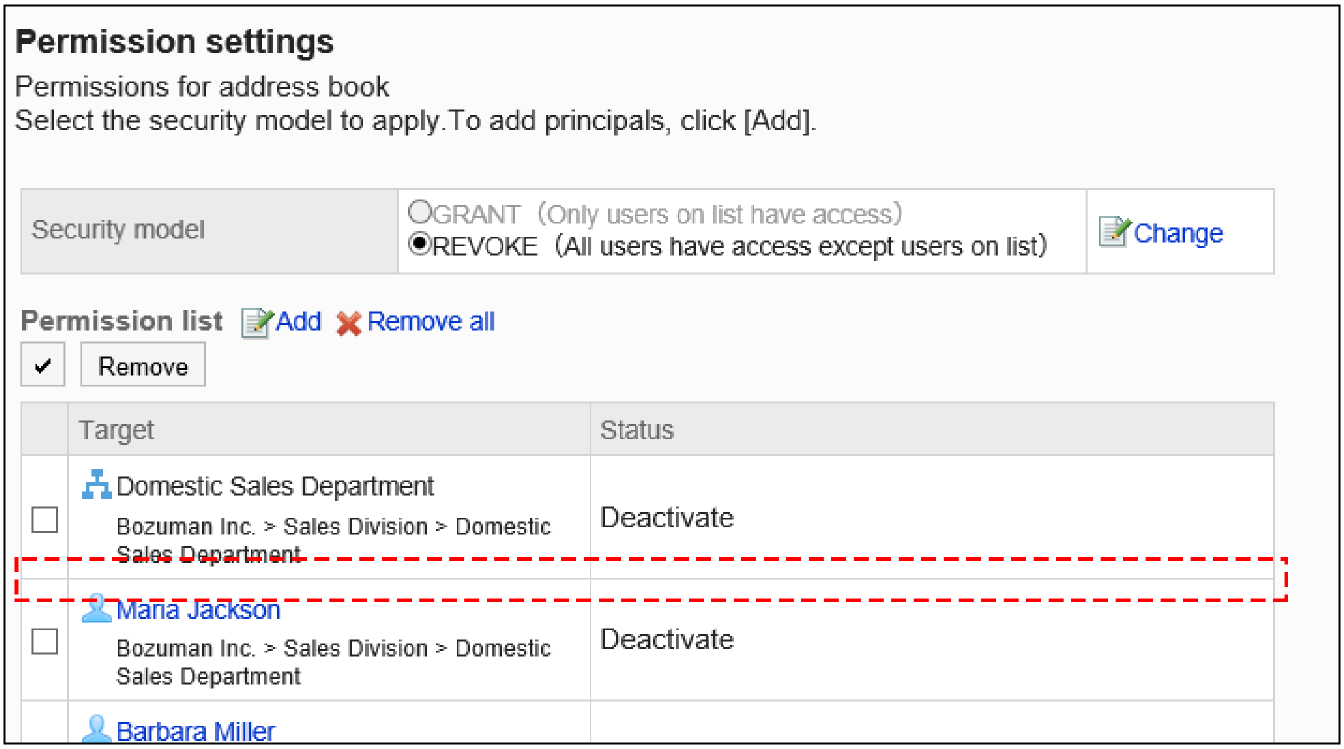
- **Example of Prohibiting Daisuke Kato to Perform Actions on Shared Address Books:**

  Grant Daisuke Kato permission only for the personal Address Book.



- **Example of Allowing Daisuke Kato to Perform all Operations:**

  You can delete Daisuke Kato from the user rights list.



Deleting Permissions

You can delete the permissions for users and organizations in the Address Book.

If you delete permissions, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":

  Users who were deleted the permissions or users who belonged to the departments or roles that lost permissions no longer be able to work with items they previously could.

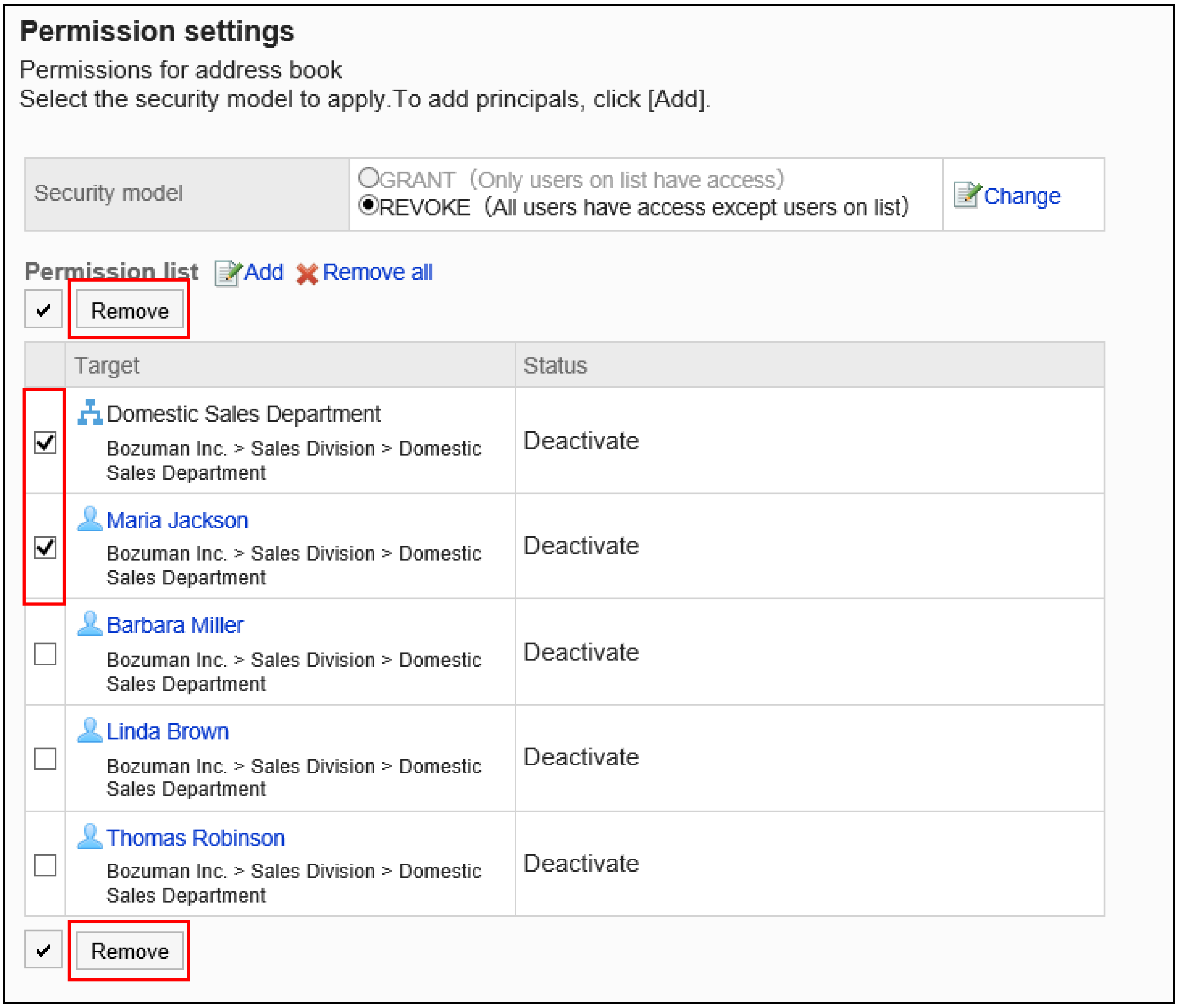
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the permissions or users who belonged to the departments or roles that lost permissions can now work with items they prohibited to use.

Selecting and Deleting Permissions

You can select permissions and delete them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "User Permissions".**
6. **On the "Permissions Settings" screen, select the check boxes for the permissions you want to delete, and then click "Delete".**



7. Click "Yes" on the "Delete all Permissions" screen.

Deleting All Permissions

You can delete all permissions.

Steps:

1. Click the administration menu icon (gear icon) in the header.

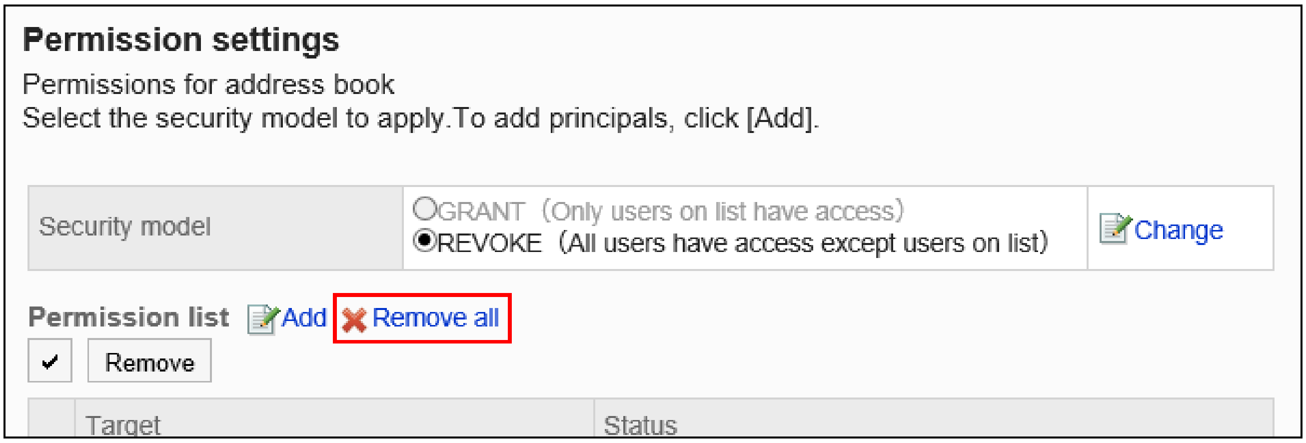
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Address Book".

5. **Click "User Permissions".**

6. **On the "User Permissions" screen, click "Delete all".**

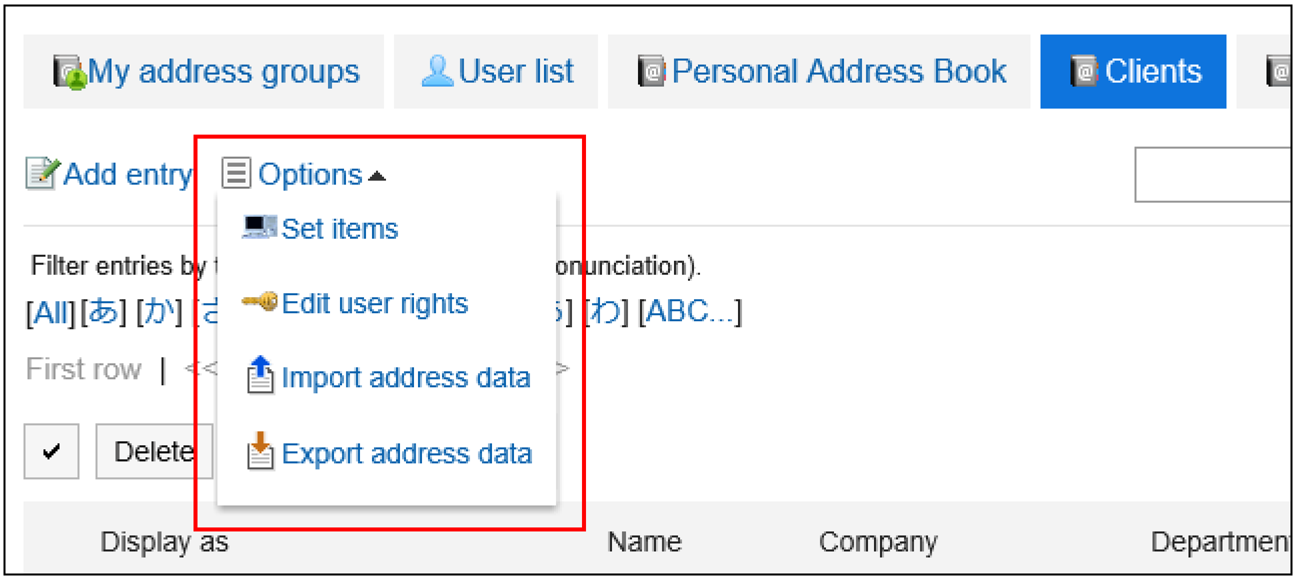


7. **Click "Yes" on the "Delete all Permissions" screen.**

2.11.6. Setting Operational Administrative Privileges for Books

Operational administrators are users who have been granted operational administrative privileges for shared address books by system administrators.

When set as operational administrator, the "Options" field is displayed on the "Address book" screen, allowing users to set items in the shared Address Book, to set permissions, and to input and output address book data using a CSV file.



Operational administrators can do the following tasks:

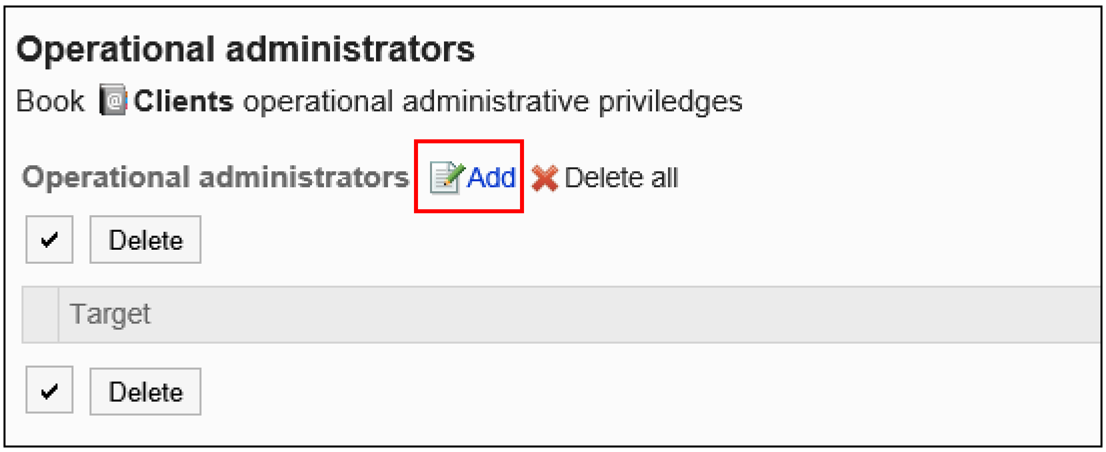
- Setting up an item
  For details, refer to Setting items in the Address Book(1112Page).
- Setting Access Permissions:
  For details, refer to Setting permissions for Books(1140Page).
- Import addresses:
  For details, refer to Importing Data from a CSV File(1150Page).
- Export addresses:
  For details, refer to Exporting to a CSV file(1152Page).

Adding Operational Administrative Privileges

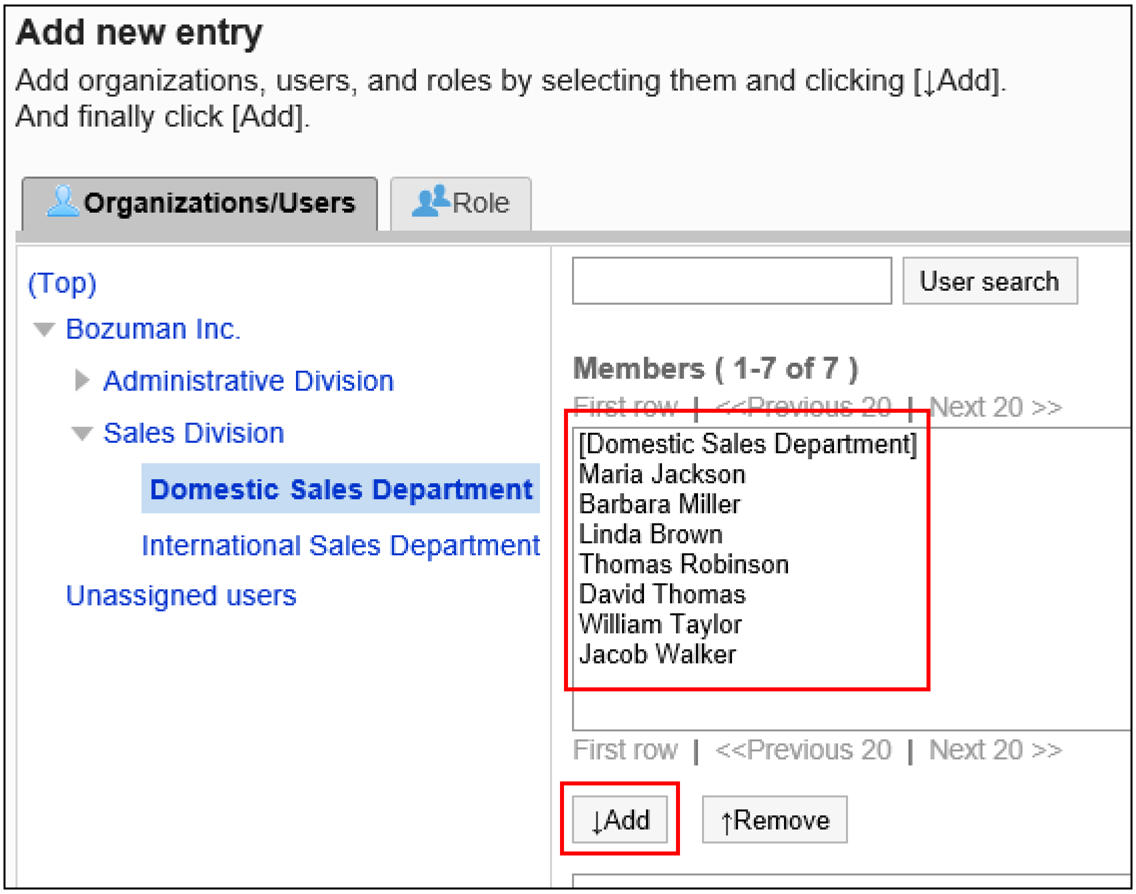
Grant operational privileges for each book.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Operational administrators".**
   If the workbook has not been set in the shared Address Book, the "Operational administrative privileges" field is not displayed.
6. **On the "Operational Administrative Privileges Settings" screen, select a book.**
7. **On the screen for operational administrative privilege list, click "Add".**



8. On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".



To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.

9. Confirm your settings and click "Add".

Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

Caution

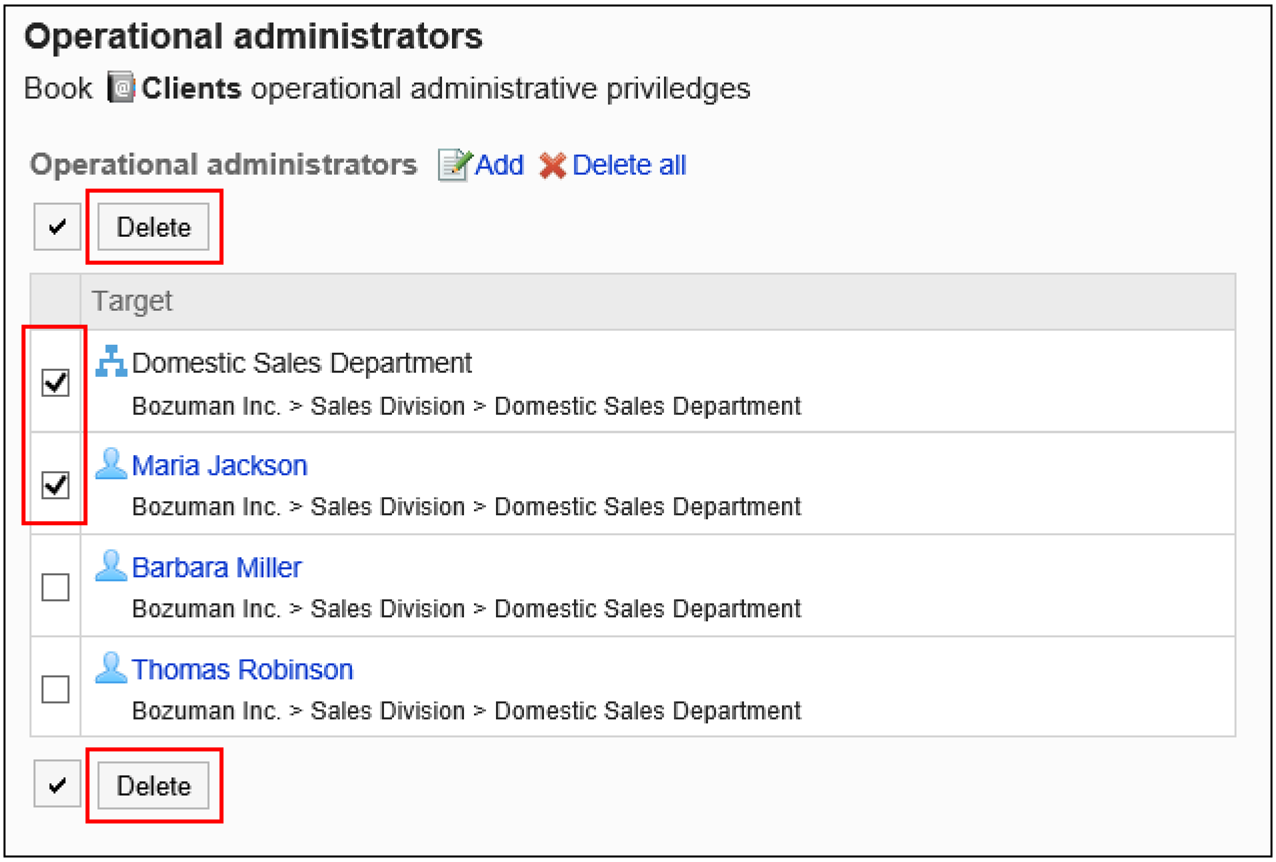
- After deleting operational administrative privileges, they cannot be restored.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Operational administrators".**
6. **On the "Operational Administrative Privileges Settings" screen, select a book.**
7. **On the screen for operational administrative privilege list, select the check boxes of the organizations, users, or roles to delete operational administrative privileges, and then click "Delete".**



8. Click "Yes" on the screen to delete all operational administrative privileges.

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

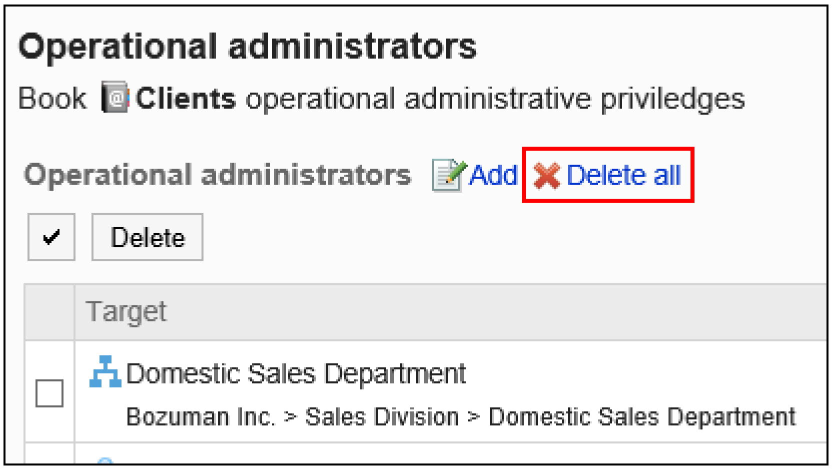
3. Select "Application settings" tab.

4. Click "Address Book".

5. Click "Operational administrators".

6. On the "Operational Administrative Privileges Settings" screen, select a book.

7. On the screen for "List of operational administrative privilege", click Delete all.



8. Click "Yes" on the delete all operational administrative privileges screen.

2.11.7. User Right Settings for Workbooks

For workbooks in a shared address book, the following permissions are set in the organization, user, or role.

- Access permissions
- Editing privileges

The permissions in the address book vary by security model.
The default setting is set to "REVOKE (All users have access except users on list)". This allows all users to view and edit the Address Book.
For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.
- User rights cannot be set in the Personal Address Book.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Edit user rights".**

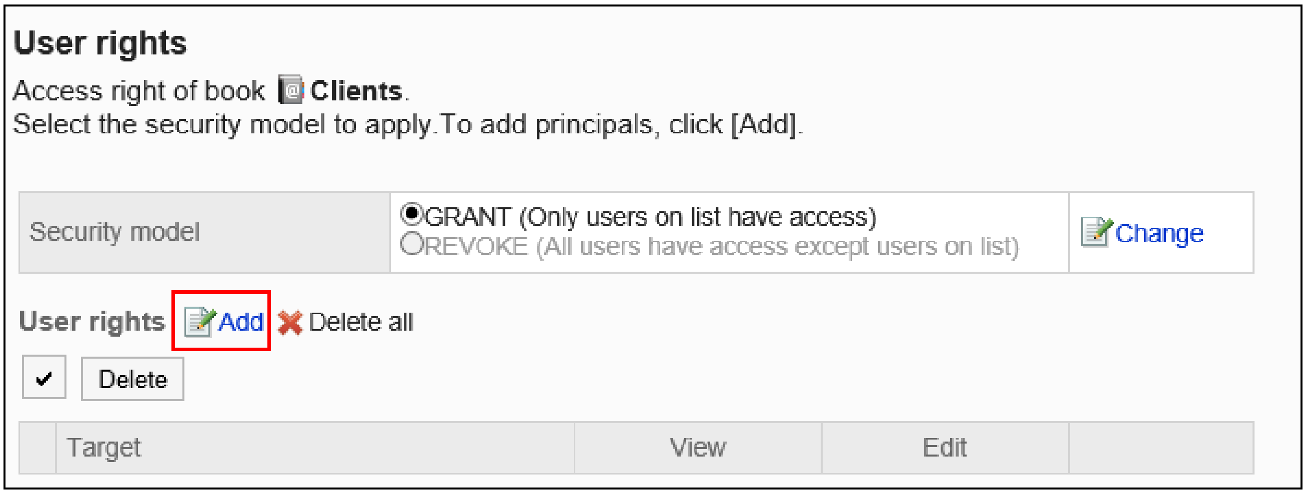
   If the workbook has not been set in the shared Address Book, the "Edit user rights" does not appear.

6. **On the "Edit user rights" screen, select a book.**

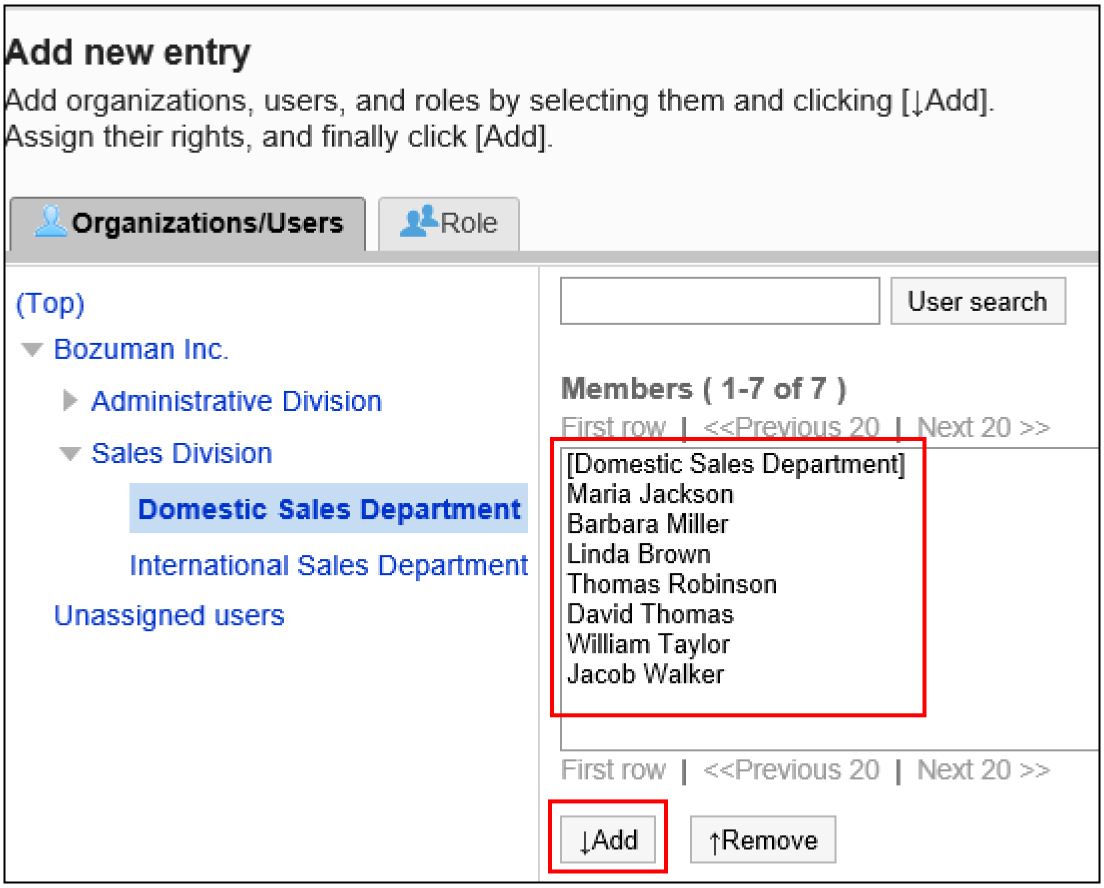
7. On the "User Rights List" screen, confirm that the security model is "GRANT (select target allowed)".

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).

8. Click "Add".



9. On the "Add new entry" screen, select the organization, user, or role, and then click "Add".



To select a role, switch the view to the Roles tab.

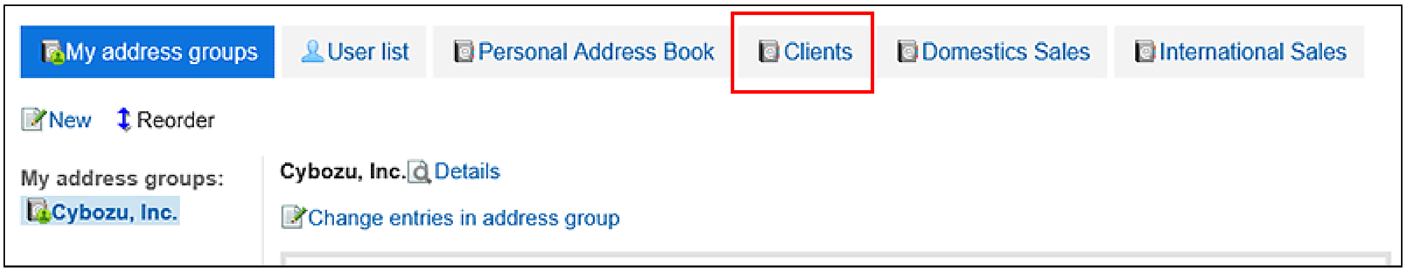
After you click "Add" then click the tab, the selected departments, users, or roles before you switch tabs are deselected.

10. Under "User rights", select the check boxes of the permissions to allow, and then click "Add".

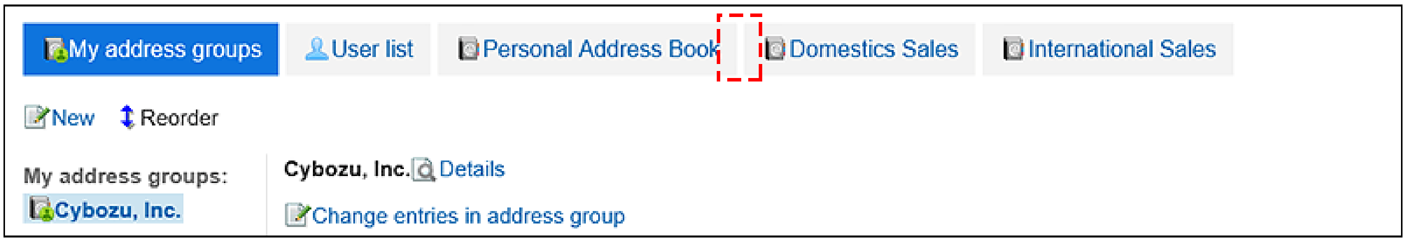
Combination of User Rights

Restricting the user rights of the address book allows only workbooks that can be manipulated by users to be displayed on the Address Book screen.

Screen showing users who have the user rights:



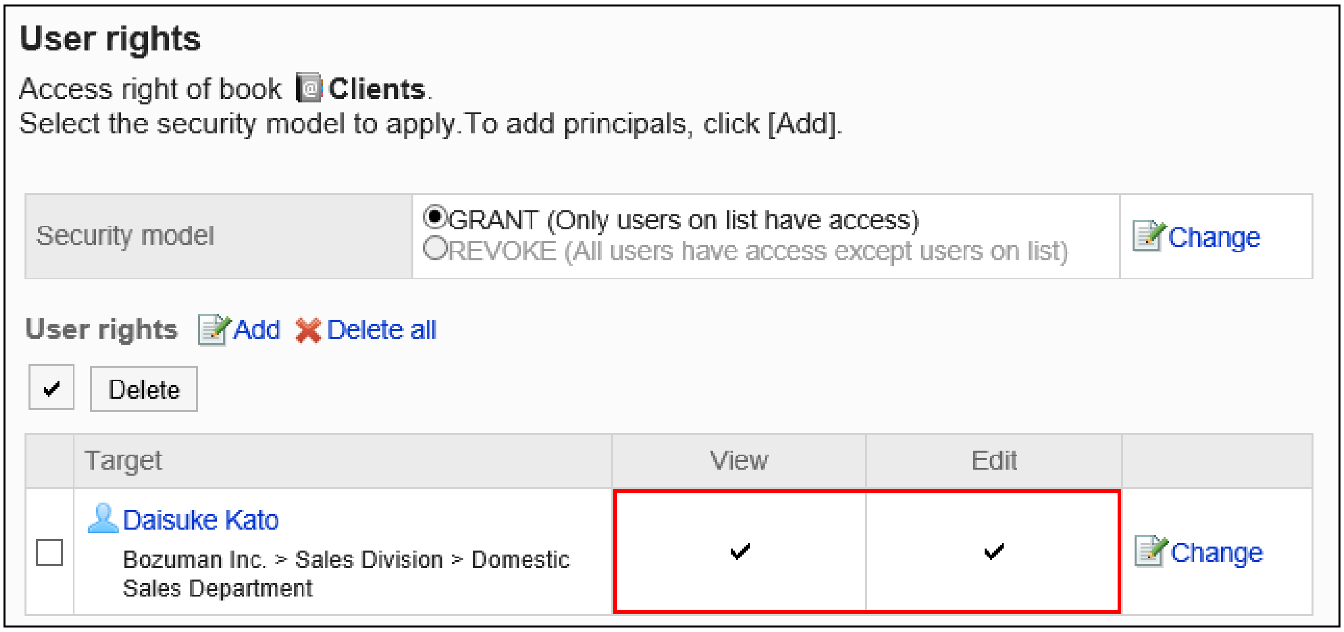
Screen showing users who do not have the user rights:



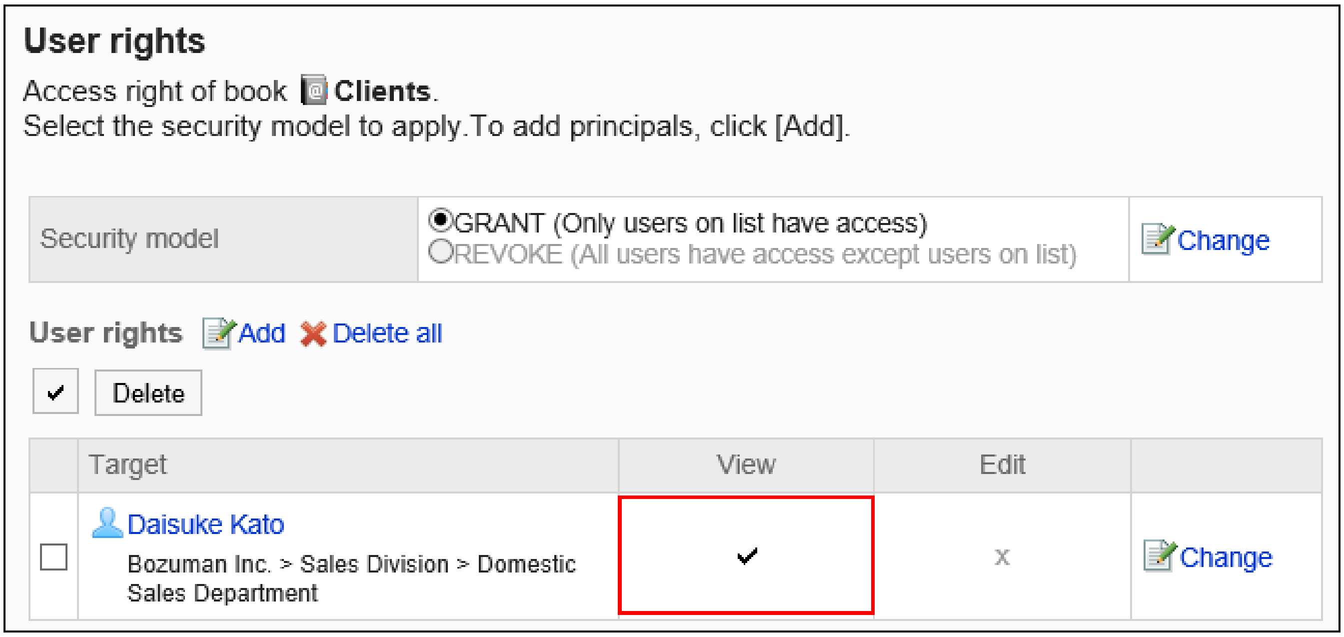
If the security model is "GRANT (Only users on the list have access)"

This section describes the security model for access rights on the account book if GRANT is selected.

- **Example of Allowing Daisuke Kato to Perform All the Actions on Business Partners:**
  Grant Daisuke Kato permission to view and edit.

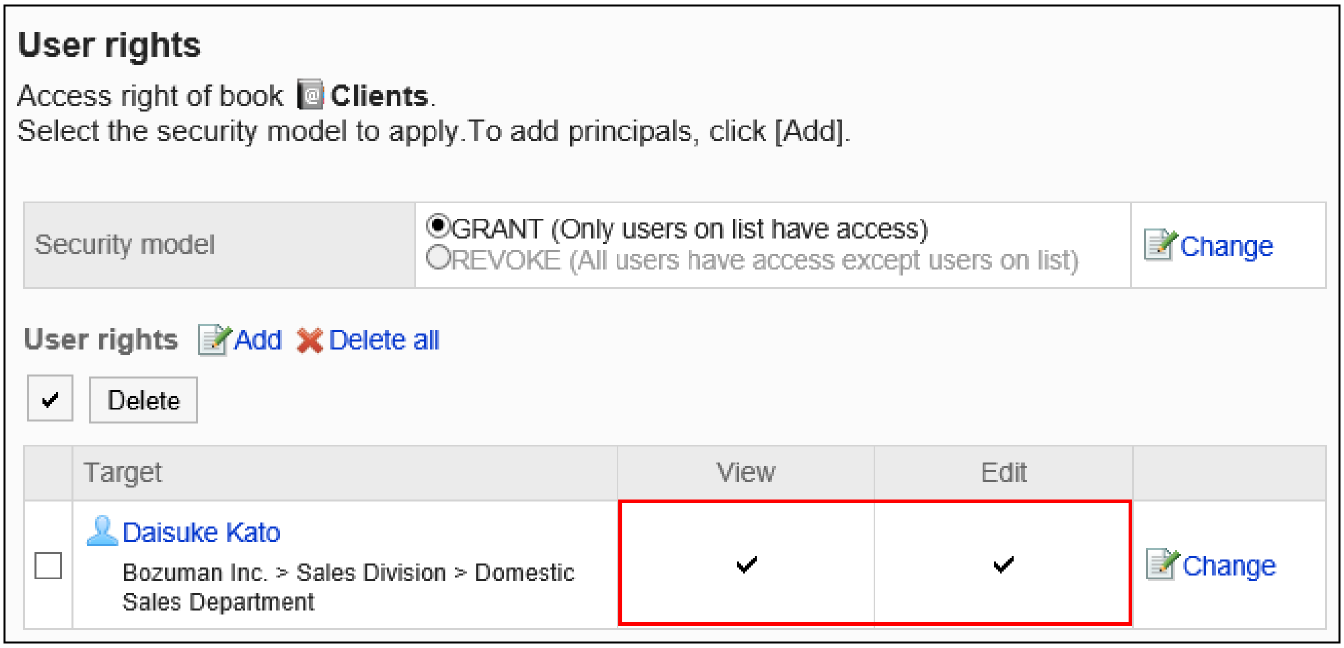


- **Example of allowing Daisuke Kato to view books for business partners:**
  Grant Daisuke Kato a permission to view items.



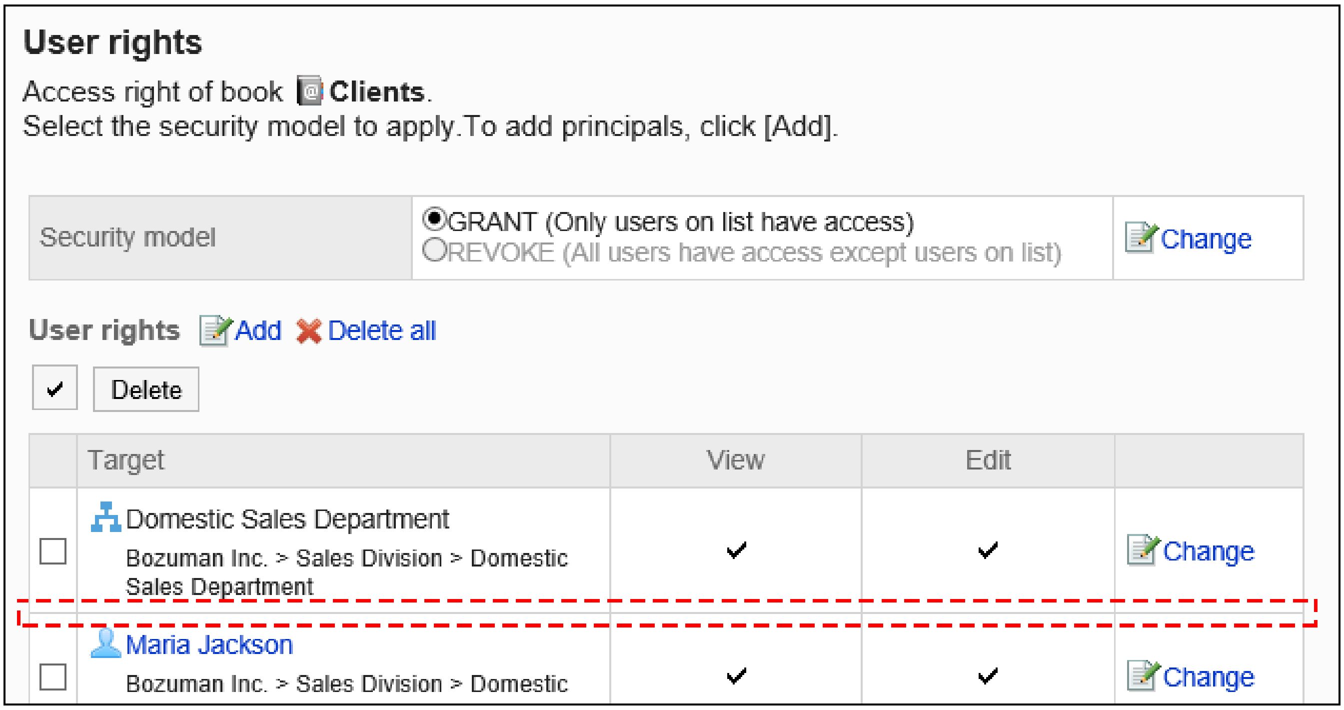
- **Example of allowing Daisuke Kato to edit books for business partners:**

  Grant Daisuke Kato permission to view and edit.



- **Example of Prohibiting Daisuke Kato to Perform All the Actions on Business Partners:**

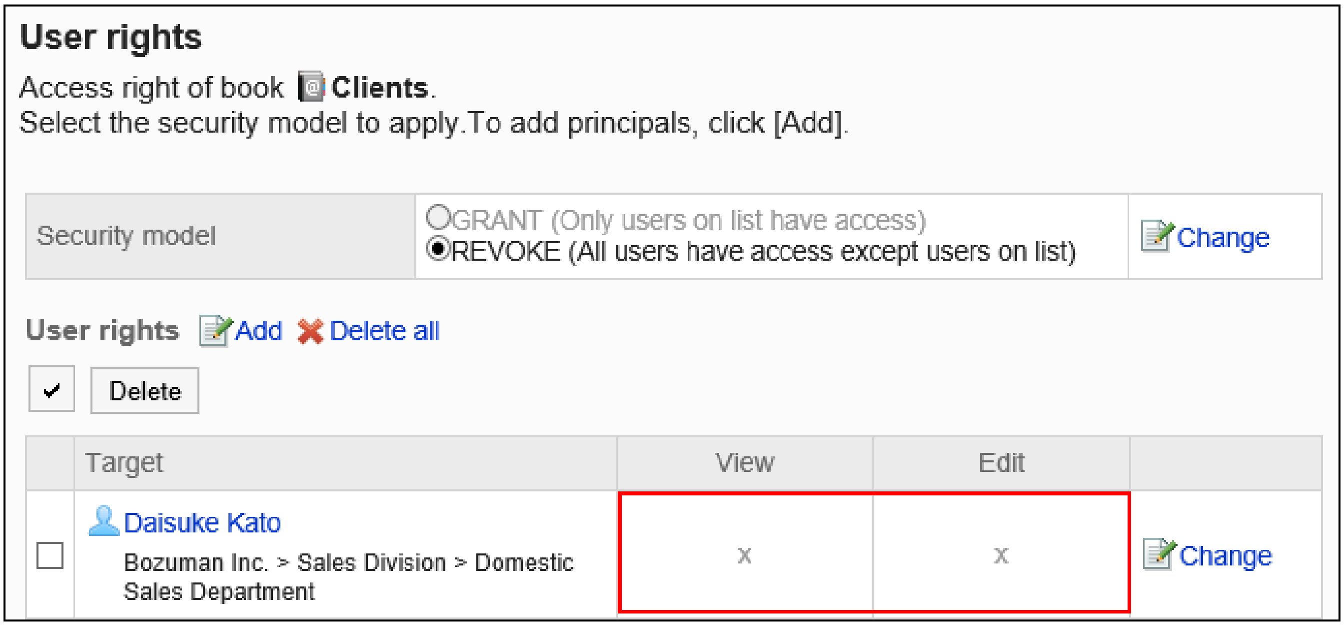
  Delete Daisuke Kato from the user rights list.



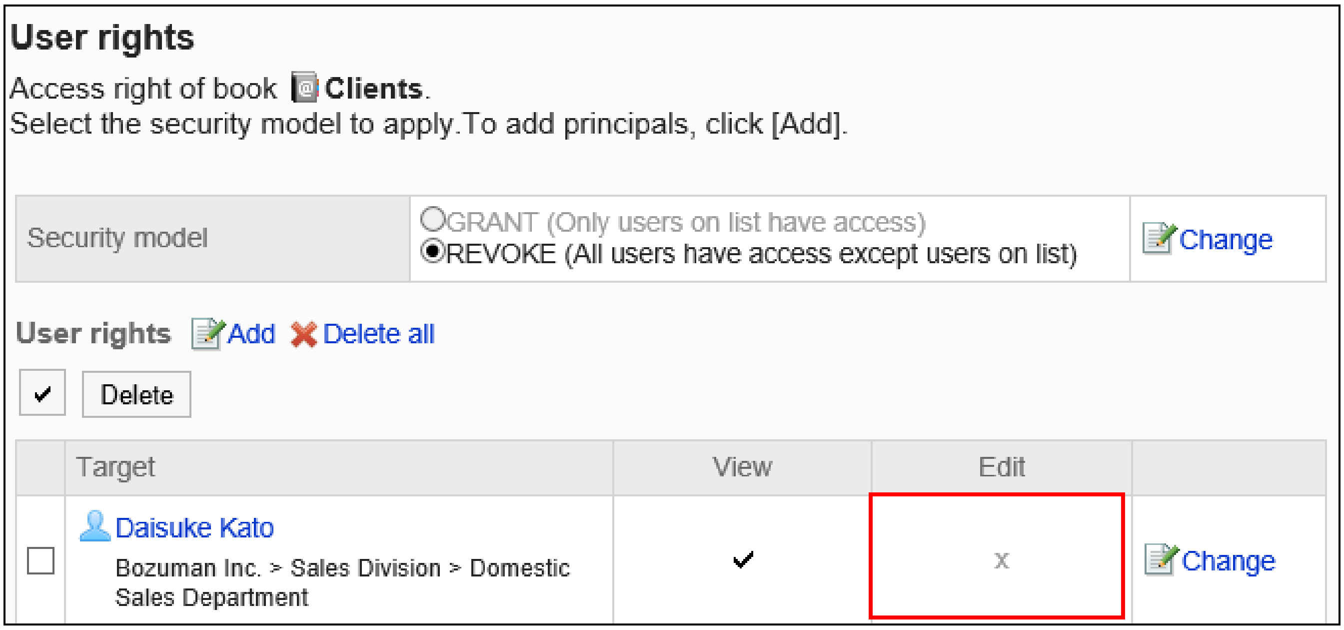
If the security model is "REVOKE (All users have access except users on the list)"

The security model for access rights to the account book is described in the "REVOKE (select a restricted target)" example.

- **Example of Prohibiting Daisuke Kato to Perform All the Actions on Business Partners:**
  You can leave the view and edit permission from Daisuke Kato.

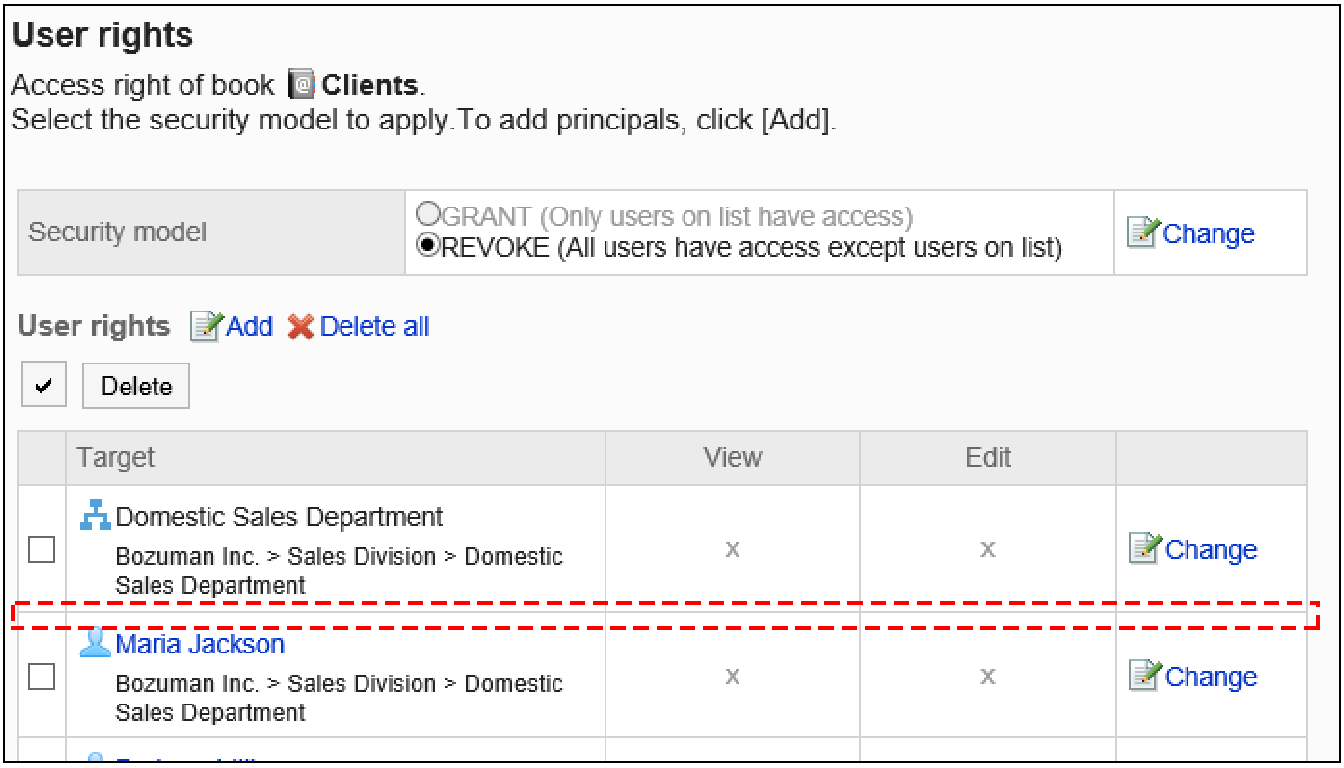


- **Example of Prohibiting Daisuke Kato to Perform Edit Book Actions on Business Partners:**
  You can remove the editing privileges from Daisuke Kato.



- **Example of Allowing Daisuke Kato to Perform All the Actions on Business Partners:**

  Delete Daisuke Kato from the user rights list.



Changing User Rights

Change access permissions granted to users and departments.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. **Click "System settings".**

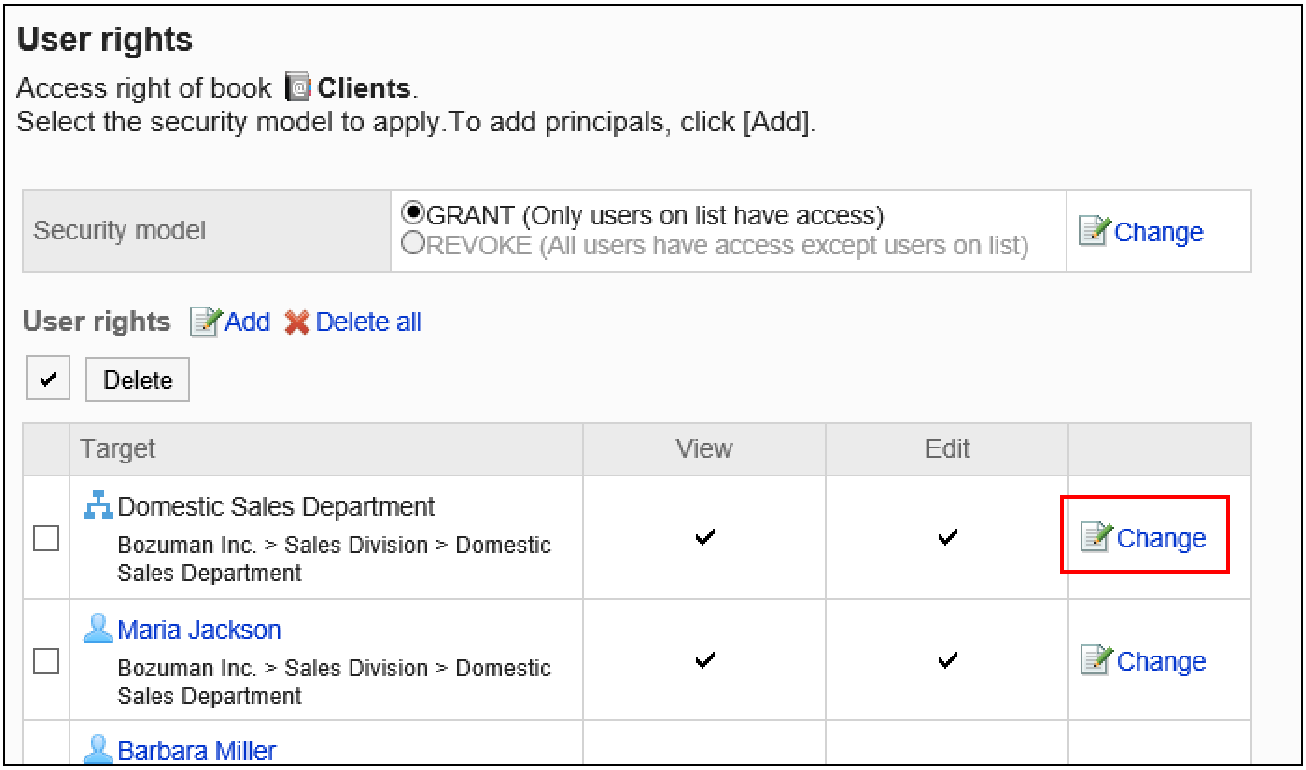
3. **Select "Application settings" tab.**

4. **Click "Address Book".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a book.**

7. **On "User Rights" screen, click "Edit" for the user rights to change.**



8. **On "Edit user rights" screen, you can change the user rights as needed.**

9. **Confirm your settings and click "Save".**

Deleting User Rights

You can delete user rights to workbooks that have been granted to users and organizations.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.

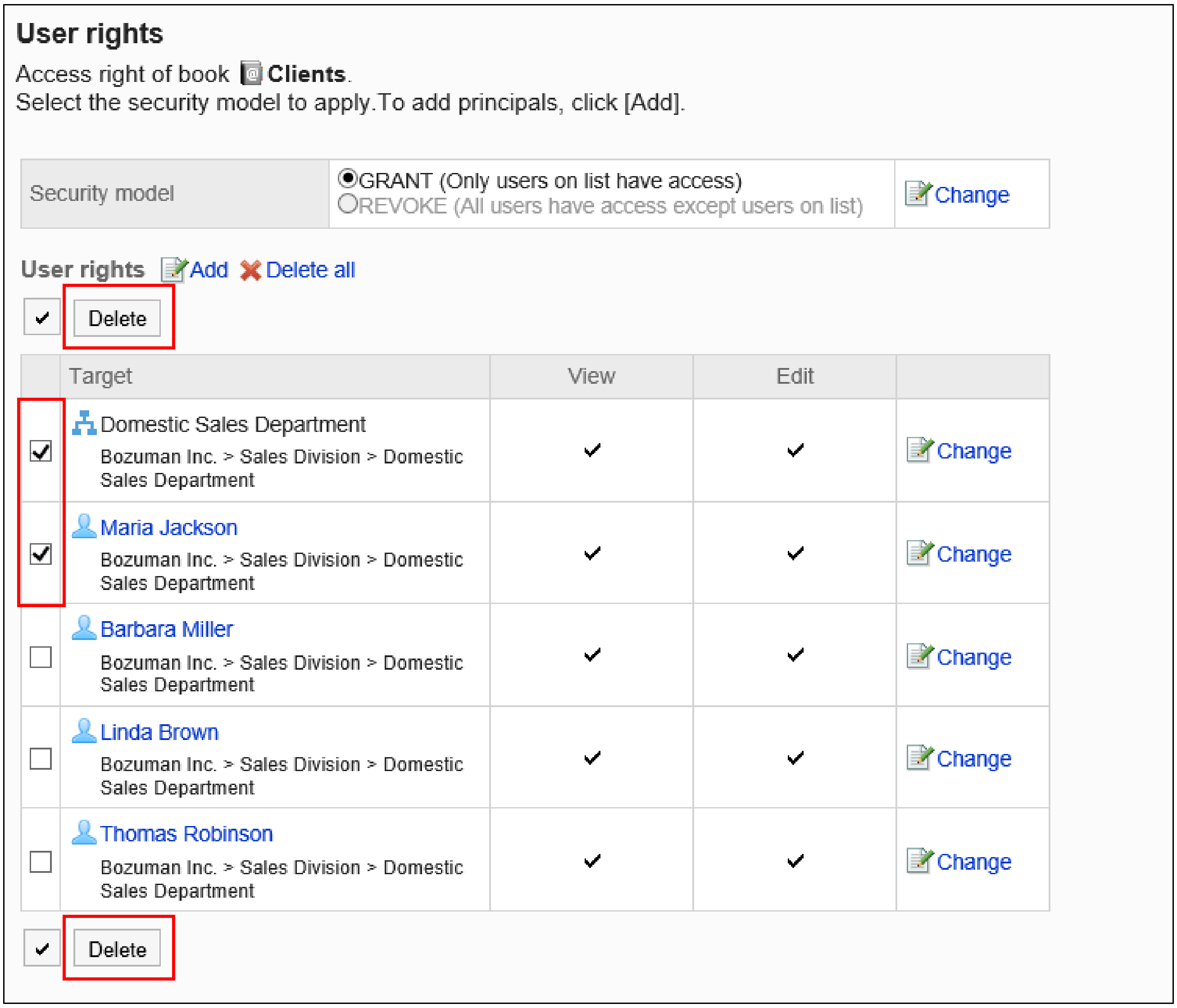
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Address Book".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select a book.**
7. **On "User Rights" screen, select the check box for the user rights to delete, and then click "Delete".**



8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

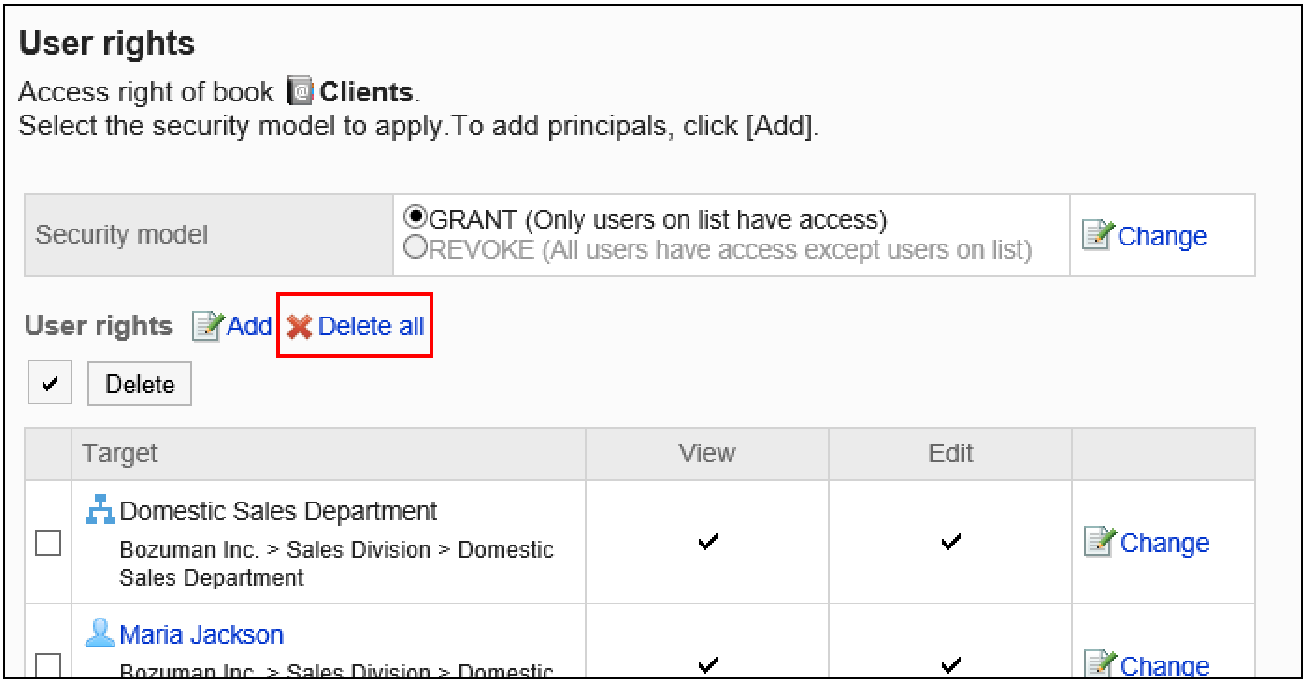
3. **Select "Application settings" tab.**

4. **Click "Address Book".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a book.**

7. **On "User rights" screen, click "Delete all".**



8. **Click "Yes" on "Delete all user rights" screen.**

2.11.8. Managing Address Books Using CSV Files

Manages the data in the Address Book in a CSV file.

The following data can be managed using CSV files:

- Addresses of shared address books
- Access Permissions

Importing Data from a CSV File

Import the Address book data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. Create a CSV file to import data.

For information on CSV files, refer to the CSV format in the Address Book(1876Page).

2. Click the administration menu icon (gear icon) in the header.

3. Click "System settings".

4. Select "Application settings" tab.

5. Click "Address Book".

6. Click "Import from CSV file".

Import from CSV file does not appear if the workbook has not been set in the shared Address Book.

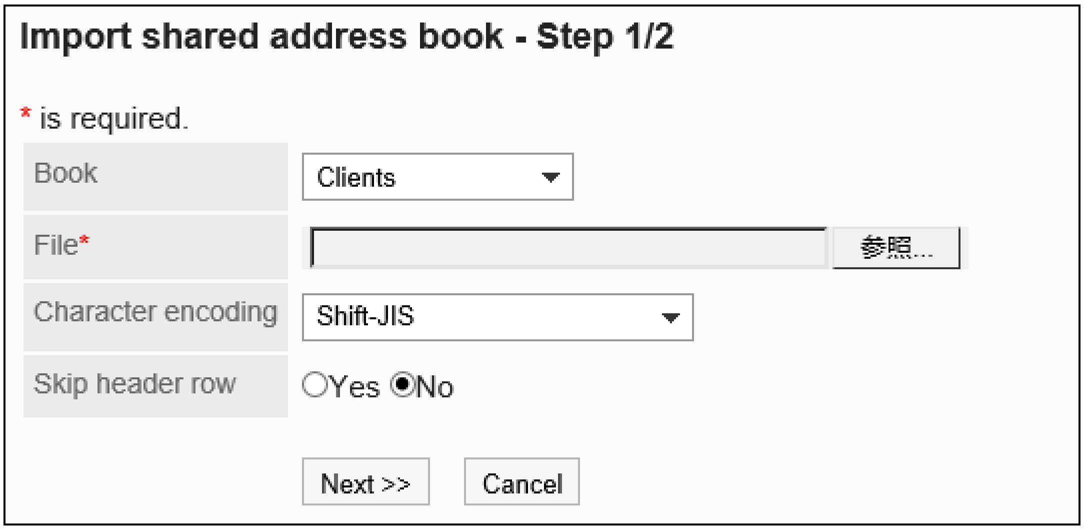
7. On "Import from CSV File" screen, select the data to import.

8. Select the CSV file that you created in step 1.

9. Set the data to import, and click "Next".

The setting fields are as follows:

- Workbook:
  Select the books you want to import.
- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



10. Confirm the CSV file contents and click Import.

Exporting Data to a CSV File

Export the Address book data to a CSV file.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Address Book".

5. Click "Export to CSV file".

Export to CSV file does not appear if the workbook has not been set in the shared Address Book.

6. On the "Export to CSV File" screen, select the data to export.

7. Set the required items for the the data to export.

The setting fields are as follows:

- Workbook:

  Select the books you want to export.
- Character encoding:

  Select the character code that you want to use for encoding.

  Following character codes can be selected.

- Unicode (UTF-8)
  You can select with BOM as required.
- Japanese (Shift-JIS)
- ASCII
- Latin1 (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)

- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".

8. Confirm your settings and click "Export".

9. Save the file with a function provided by your Web browser.

2.12. E-Mail

E-Mail is an application for sending and receiving e-mails. It supports multi-accounts.
The system administrators and the application administrators can set the maximum size of e-mails and limitations of the settings that users can change.

Caution

- Garoon has no e-mail server feature. To send and receive e-mails, a mail server must be installed.
  For details, refer to Setting up an E-Mail Server(1175Page).

Character codes supported by e-mail

Caractors Garoon e-mail feature supports are as follows:

- Unicode (UTF-8)
- Japanese (Shift-JIS)
- Japanese (JIS)
- Japanese (EUC)
- English (ASCII)
- Western European language (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)
  If character encoding for an incoming e-mail is "Windows-874", it is automatically determined as Thai.

References

- General Settings of E-mails(1154Page)
- Setting up an E-Mail Server(1175Page)
- User Account Settings(1188Page)
- Setting up E-Mail Quotas(1205Page)

2.12.1. General Settings of E-mails

On "General Settings" screen of e-mails, you can set the basic functions of e-mail.

Common Settings

This section describes that the settings set on "Common Settings" in "General Settings" screen.
On the "Common Settings", you can set common settings for all users such as "Check new E-mail when logging in" and settings for receiving e-mails automatically.

Stopping E-Mail Client Function

If you do not use Garoon as an e-mail client, you can stop the client function.
It is useful when stopping e-mail transmissions temporarily during maintenance on the mail server or the like.
You can view e-mails that were already received, even after the e-mail client function has been stopped.
If you stop the e-mail client function, the following functions are disabled:

- Sending and receiving e-mails
- Checking new e-mails

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Common Settings" in "General Settings" screen, select "Set" to stop e-mail client functions.**
7. **Confirm your settings and click "Save".**

Setting to Check New E-Mail When Logging In

The Check new E-mail when logging in function is a feature to check the e-mail received by the mail server and display the number of new e-mails in the "E-mail" screen and the "New e-mail" portlet.
You can set whether or not to check the newly arrived e-mails when users log in to Garoon.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click "General Settings".**

6. **On "Common Settings" in "General Settings" screen, select "Set" in "Check new E-mail when logging in".**

7. **Confirm your settings and click "Save".**

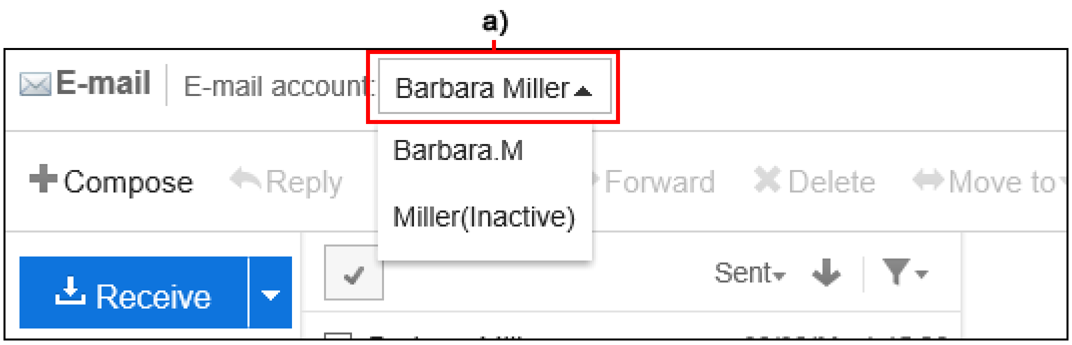
Note

- To view newly arriving e-mails checked by Garoon, users must click to "Receive" or "Receive all" on the "Mail" screen.
  For details, refer to Receiving E-mails.

Setting to Receive E-Mails Automatically

Receives e-mails at a specified time or at a specified interval automatically.
While receiving e-mails automatically, the load for Garoon increases. If you set the time for receiving e-mails automatically while Garoon has low loads such as midnight or early morning, you can avoid outbreaks of excessive load on the server during intensive access.

If you use multiple e-mail accounts, only e-mails of the account that is initially displayed on the E-mail page can be received automatically.



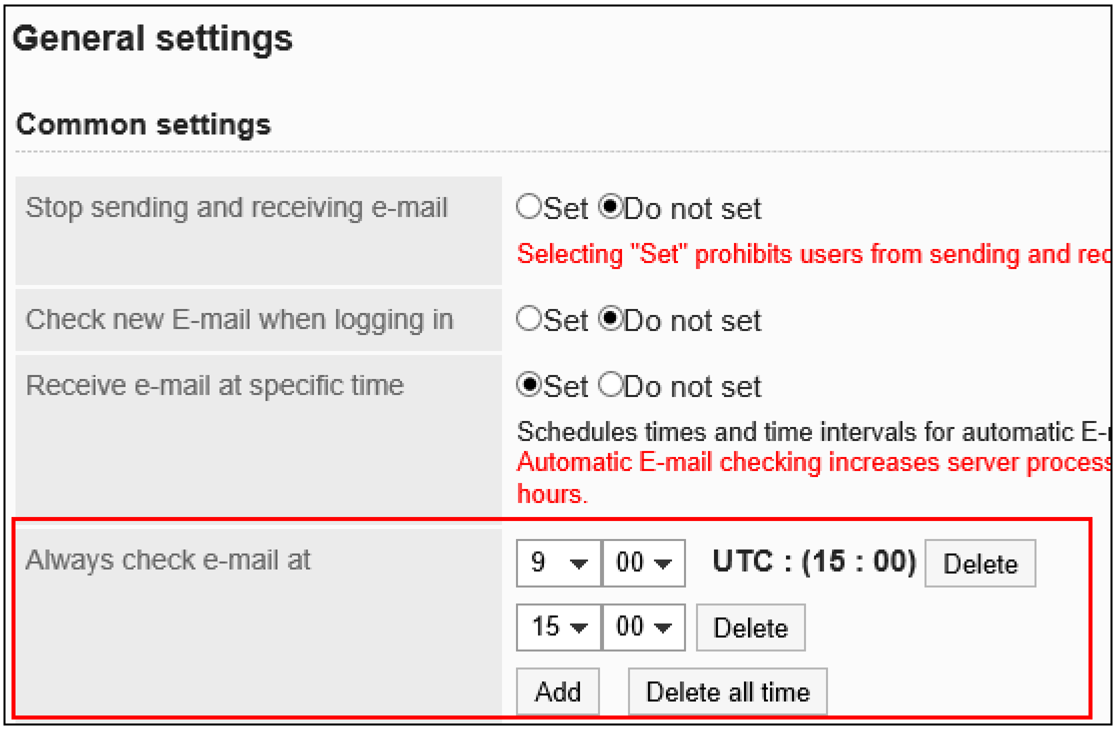
a): The first e-mail account appears on top

Receiving E-Mails at Specified Time

If you specify the time to automatically receive e-mails, they arrive automatically at the specified time of day.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Common Settings" in "General Settings" screen, select "Set" to automatically receive e-mails.**
7. **In the "Receiving e-mails at a specified time" field, set the time to automatically receive e-mails.**
   You can add time to automatically receive e-mails to set multiple times.



8. **Confirm your settings and click "Save".**

Receiving E-Mails at Specified Interval

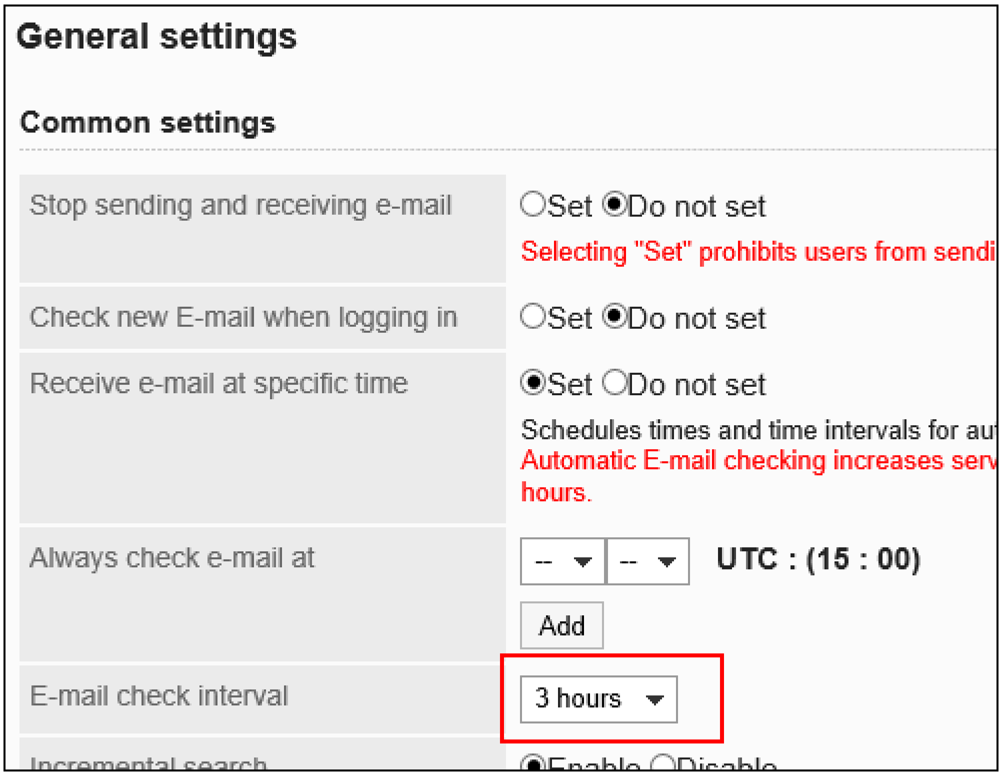
If you set an interval to receive incoming e-mails, they arrive automatically at the specified interval.
Once the settings set in "General settings" screen are saved in Garoon, incoming e-mails are received when the time specified as the interval passes.

- Settings:
  E-mail check interval: 12 hours
  The date and time that the settings are saved: November 22nd, 2009 12:34 PM
- Date and time when e-mails are automatically received:
  1st time: Nov 23, 12:34 am
  2nd time: November 23rd, 12:34 PM
  3rd time and after that: 12 hours after the last time

For the setting automatically receive e-mails, the time zone of the administrator who set to receive automatic is applied. If the administrator uses a time zone that has daylight saving time, e-mails will be automatically received according to the daylight saving time.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Common Settings" in "General Settings" screen, select "Set" to automatically receive e-mails.**
   In the "E-mail check interval" field, set the interval to receive.
   The following intervals can be set for this field:
   - (None)
     If you stop automatically receiving e-mails in an interval, select "(None)".
   - 1 hour
   - 3 hours
   - 6 hours
   - 12 hours
   - 24 hours



7. **Confirm your settings and click "Save".**

Note

- If you specify both the time and interval, both are available.
- The settings for filters and notifications are available for e-mails that are received automatically
- If incoming E-mail sizes are restricted, oversized E-mail cannot be received automatically.
- You can receive e-mails up to 500 MB in size at a time per account.

Using Incremental Search

Sets whether to use the incremental search for e-mail addresses.

Incremental search is a feature that allows you to quickly find search targets matching characters one by one while entering them.

The default value is set to Enable.

For details on Incremental search, refer to Incremental search specification.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **In the "Incremental Search" field on "Common Settings" in "General Settings" screen, select "Enable".**

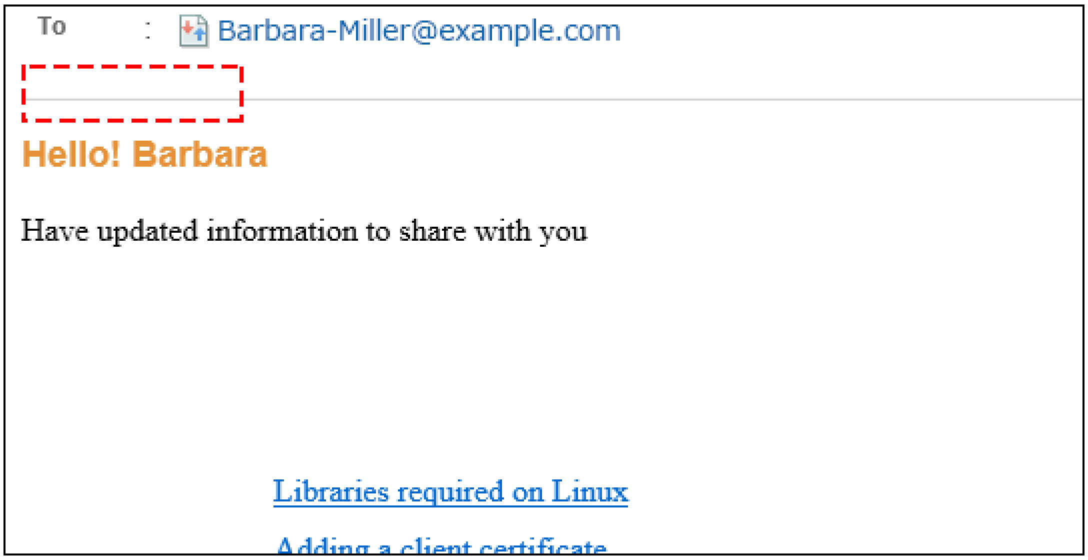
6. **Confirm your settings and click "Save".**

Allowing Referencing Images in HTML E-Mail

Set whether to allow to access linked images when HTML e-mails have them.
If you do not allow to access the images, the "Show images" does not appear on the "E-mail details" screen.

Example of a screen showing when accessing linked image is allowed:

Example of a screen showing when accessing linked image is not allowed:



Steps:

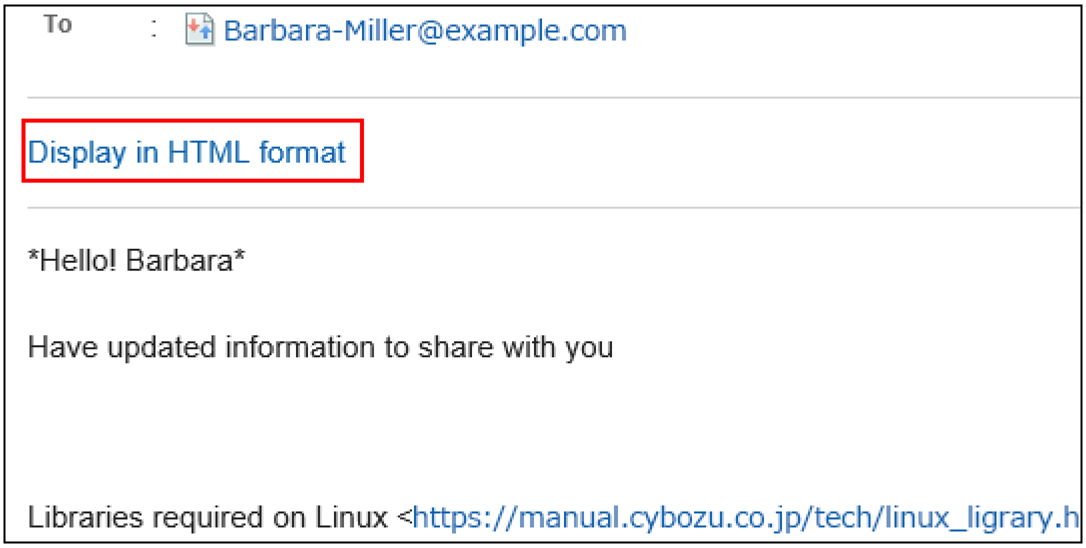
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Common Settings" in "General Settings" screen, select "Allow of HTML E-mail image display".**
7. **Confirm your settings and click "Save".**

Displaying HTML E-Mail as Plain Text by Default

You can set whether to allow viewing e-mails in HTML format or text format only when users access "E-mail details" screen.

If you select "Displays only text", the "Display in HTML format" link appears on "E-mail details" screen for users. When this link is clicked, the email is displayed in HTML format in a new window.

When the HTML e-mail has an attachment, the attachment is displayed in the new window.



Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Common Settings" in "General Settings" screen, select the check box for "Displays only text" in "Default HTML e-mail view".**
7. **Confirm your settings and click "Save".**

Note

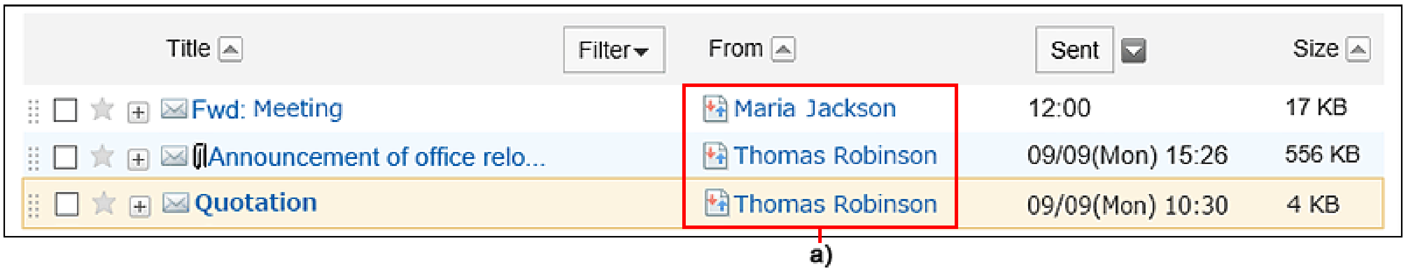
- If image files are inserted in HTML e-mails, clicking "Display in HTML format" does not display the "Show images" link in the another window appears.
- When a HTML e-mail is displayed as plain text, the format of the reply or forward of the e-mail is also plain text.

Allowing Send and Receive Log Function

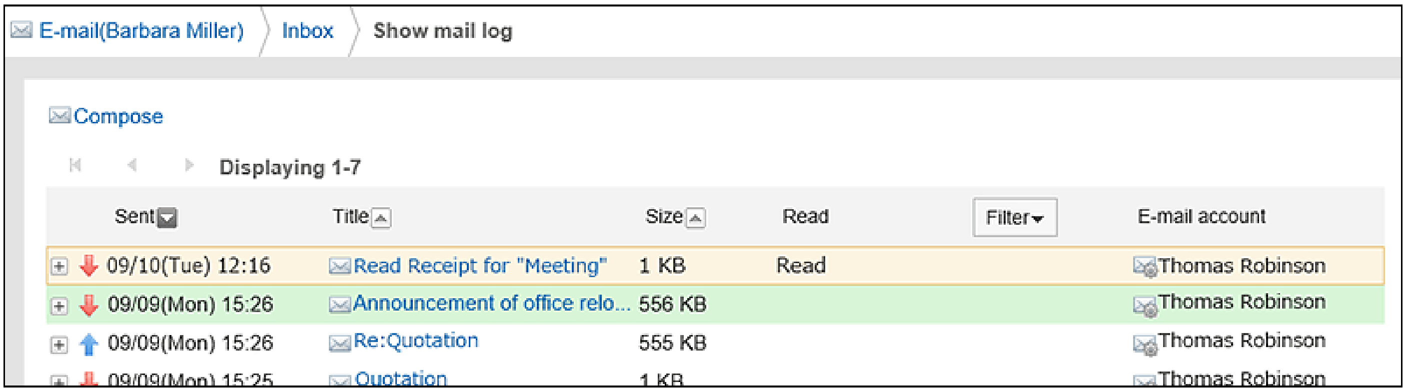
Specify whether to allow the send and receive log functionality. Showing mail logs is a feature to confirm the history of specific e-mail address.

If you allow users to use the log functionality, they can check e-mails sent or received by each sender on "Show mail log" screen.

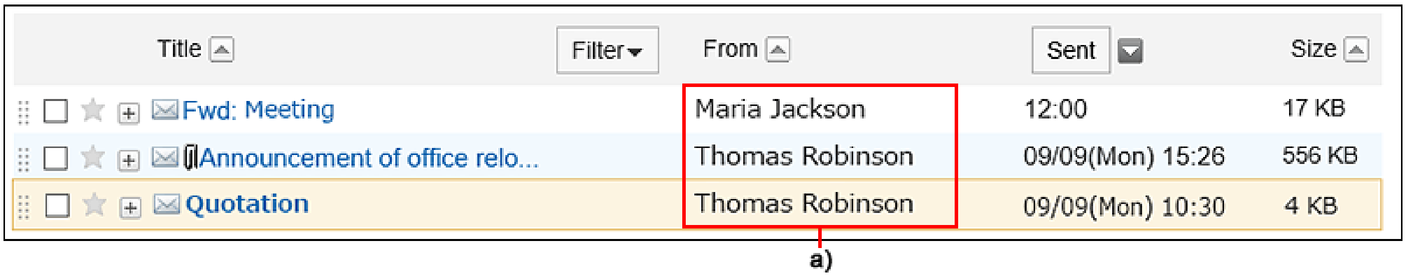
If Sending/Receiving Log Function Is Allowed



a): When you click "From" link or "To" link, "Show e-mail log" screen appears.



If Sending/Receiving Log Function Is Not Allowed



a): The "From" or "To" link doesn't work. Also, the icons do not appear.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click "General Settings".**

6. **On "Common Settings" in "General Settings" screen, select "Allow" in the send and receive log functionality.**

7. **Confirm your settings and click "Save".**

User-Editable Settings

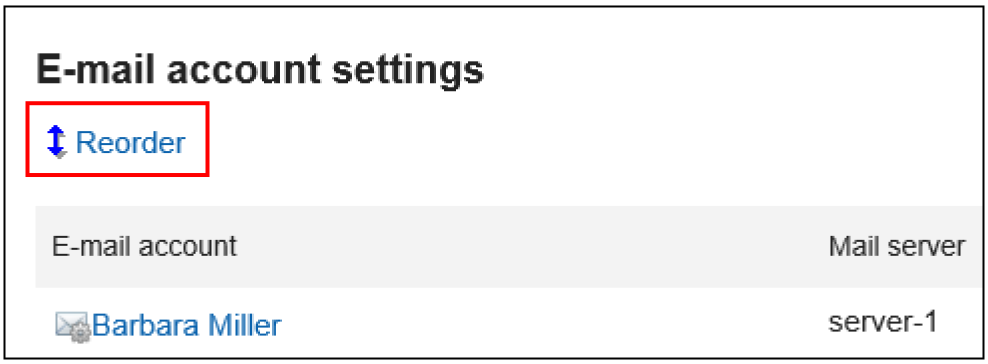
This section describes on the settings you can set in "User-editable settings" on "General settings" screen.
The "User-editable settings" option allows users to change whether or not to use the new e-mail check feature and whether to use automatic e-mail forwarding.

Allowing Operations for E-Mail Account

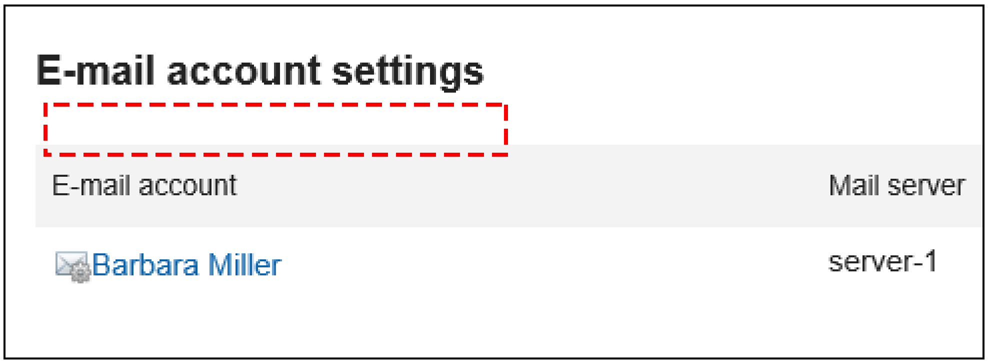
Select whether to allow users to add, edit, and delete their e-mail accounts.
If you allow them, users can add, edit, and delete their e-mail accounts in their "Personal settings" screen.

Example when users are allowed to add, change, or delete e-mail accounts:

Example when users are allowed only to change e-mail accounts:



Example when users are prohibited to add, change, or delete e-mail accounts:

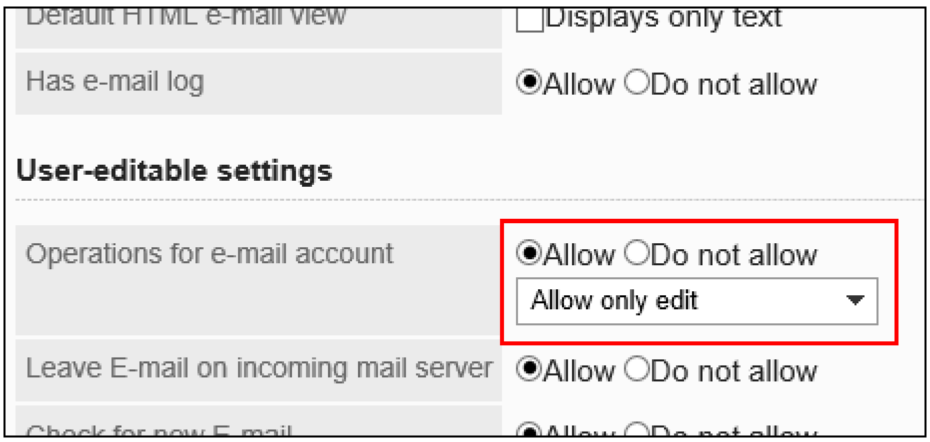


Note

- Even if the users' operations for their e-mail accounts are not allowed, they can still perform OAuth authorization.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **In "User-editable settings" field on "General settings" screen, select "Allow" to allow settings for users.**



7. **Confirm your settings and click "Save".**

Leaving E-mails on Incoming Mail Server

Select whether to allow users to leave e-mails on incoming mail server.
If you allow users to change this setting, users can set whether or not to leave e-mails on incoming e-mail server in their personal setting.

Caution

- If your incoming mail server uses POP3 and does not support the UIDL command, configure your settings not to retain any e-mails on it.
  If you configure the settings to retain e-mails, you will experience the following depending on your Garoon version:
  - Version 5.9.0 or later: An error occurs and cannot receive e-mails.
  - Before version 5.9.0: Receive e-mails that you have already received earlier.

Note

- If you select not to leave e-mails in incoming e-mail server, e-mails are deleted from the server when the user receives e-mails. If users use other e-mail clients in combination with Garoon, e-mails received in Garoon cannot be received in other e-mail clients.
  If you use an IMAP server for incoming e-mail, we recommend that you select to leave e-mails in the incoming e-mail server.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**

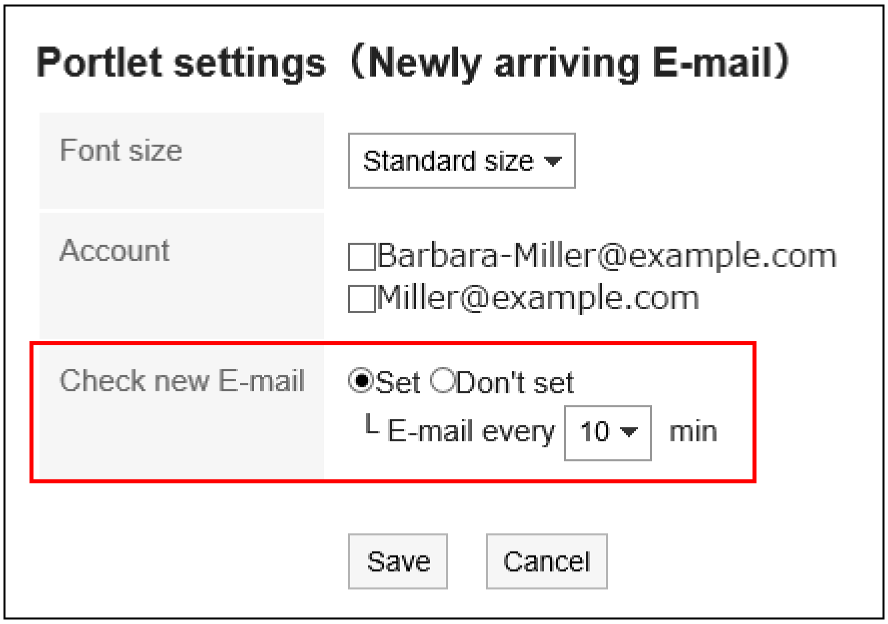
6. **On the "General Settings" screen, select "Allow" in the "Leave E-mail on incoming mail server" field.**

7. **Confirm your settings and click "Save".**

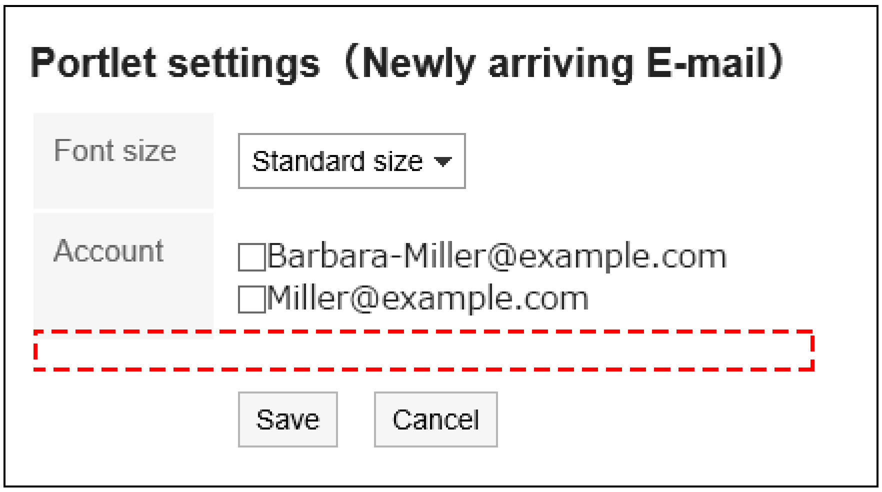
Allowing to Check New E-Mail Function

Select whether to allow users to use to check new e-mail feature.
If you allow the setting, users can change the frequency of checking the number of newly arrived e-mails in the new arriving e-mail portlet in their personal settings.

Example screen if you are allowed to use the new e-mail check feature:



Example screen if you are not allowed to use the new e-mail check feature:



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click "General Settings".**

6. **On "General Settings" screen, select "Allow" in the "Check new E-mail when logging in" field.**

7. **Confirm your settings and click "Save".**

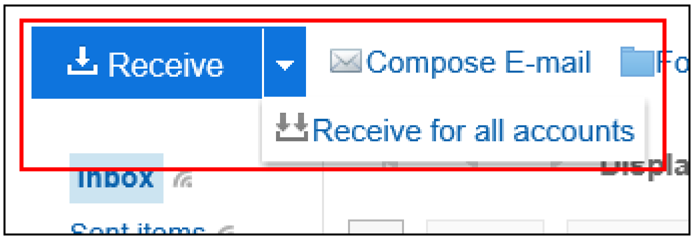
Setting to Receive E-Mails in Bulk

Set whether to allow users to receive e-mails for all accounts when the users have more than one e-mail accounts.

Example when receiving e-mails for all accounts allowed:

"Receive for all accounts" appears on the user's e-mail screen.

When the user clicks "Receive for all accounts", e-mails of all active e-mail accounts are received.



Example when receiving e-mails for all accounts is not allowed:

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On the receiving e-mails in bulk field in "General Settings" screen, select "Allow".**
7. **Confirm your settings and click "Save".**

Allowing Users to Create HTML E-Mails

Set whether to allow users to use sending e-mails in HTML format.
If you allows users to use this function, users can create and send HTML e-mails using form editor.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On the HTML e-mail creation field in "General Settings" screen, select "Allow".**
7. **Confirm your settings and click "Save".**

Allowing Users to Forward E-Mails Automatically

Select whether to allow users to use automatic e-mail forwarding.
Automatic e-mail forwarding lets users automatically forward incoming e-mails received in Garoon to the e-mail addresses to forward.
The forwarding e-mail address can be specified in the user's "Personal settings" screens.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Automatic e-mail forwarding" field in "General Settings" screen, select "Allow".**
7. **Confirm your settings and click "Save".**

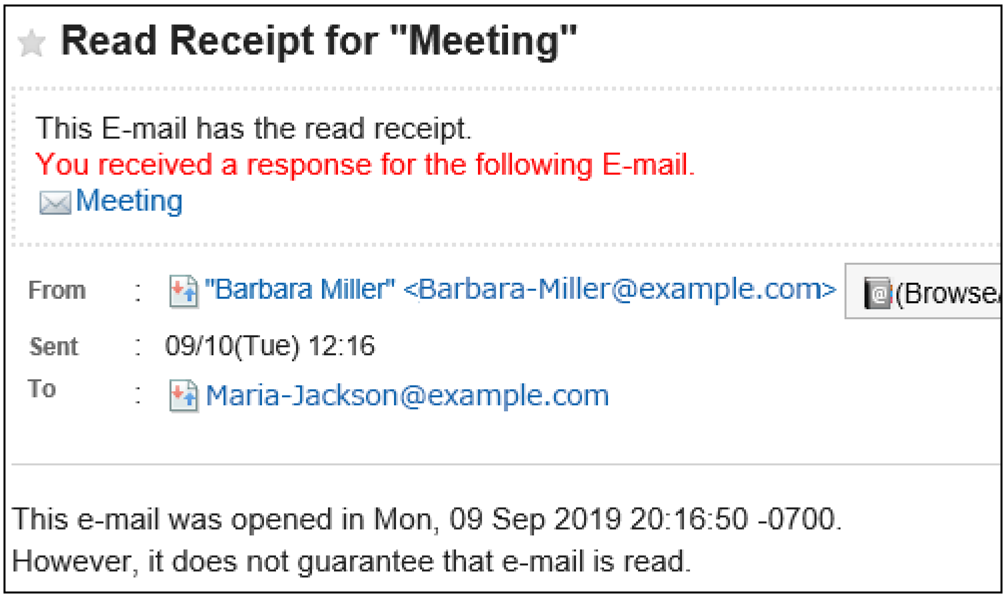
Note

- If the sender address of the e-mail to be forwarded and the forwarding address specified in Personal settings are the same, the e-mail is not forwarded.

Allowing Users to Use Read Receipts

Set whether to allow users to use the read receipts.
Read receipt is a function to automatically notify senders by e-mail that the recipients have opened e-mails.
By using the the read receipts, senders can check whether the recipients read the e-mails.
However, the read receipt e-mails will not be sent if the recipient does not accept the read receipt notification.

Example of a read receipt the sender received:



Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "General Settings".**
6. **On "Read receipt settings" field in "General Settings" screen, select "Allow".**
7. **Confirm your settings and click "Save".**

Allowing Users to Manage Status

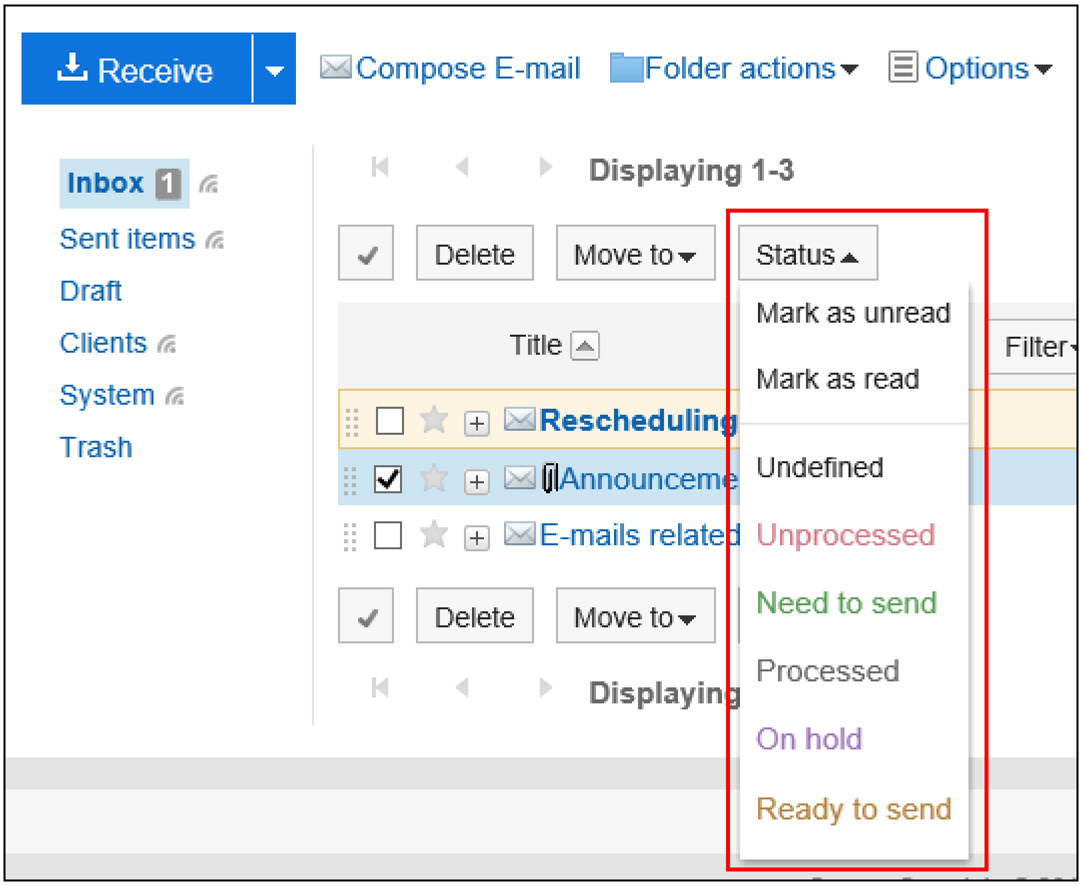
Select whether to allow users to use status management feature.

The status management feature allows users to set statuses to e-mails and manage the statuses of e-mails.

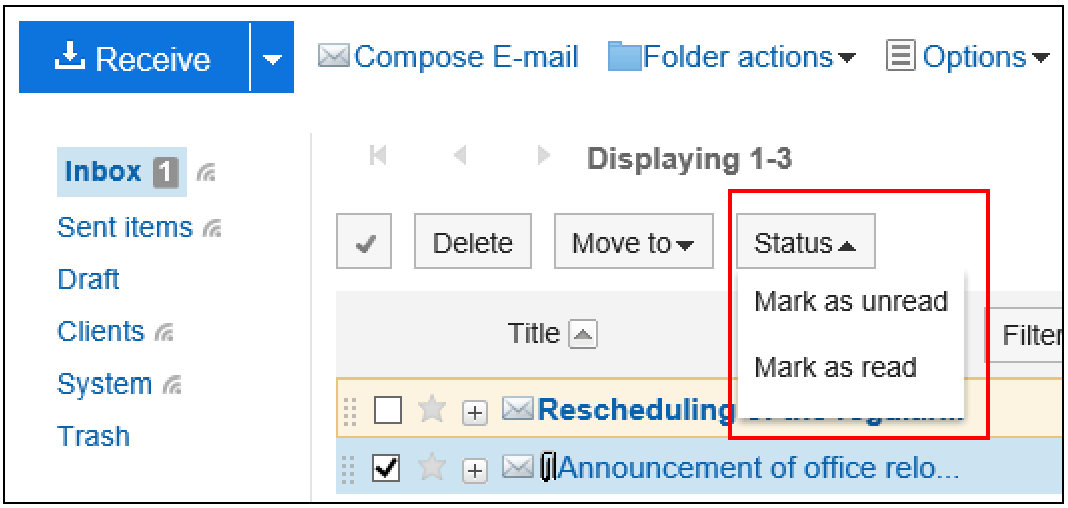
If you allow users to use the status management feature, users can set the following statuses:

- Not set
- Unprocessed
- Need to send
- Processed
- On hold
- Ready to send

Example screen when the status management feature is allowed:



Example screen when the status management feature is not allowed:



Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. Click "E-mail".

5. Click "General Settings".

6. On "Status management feature" field in "General Settings" screen, select "Allow".

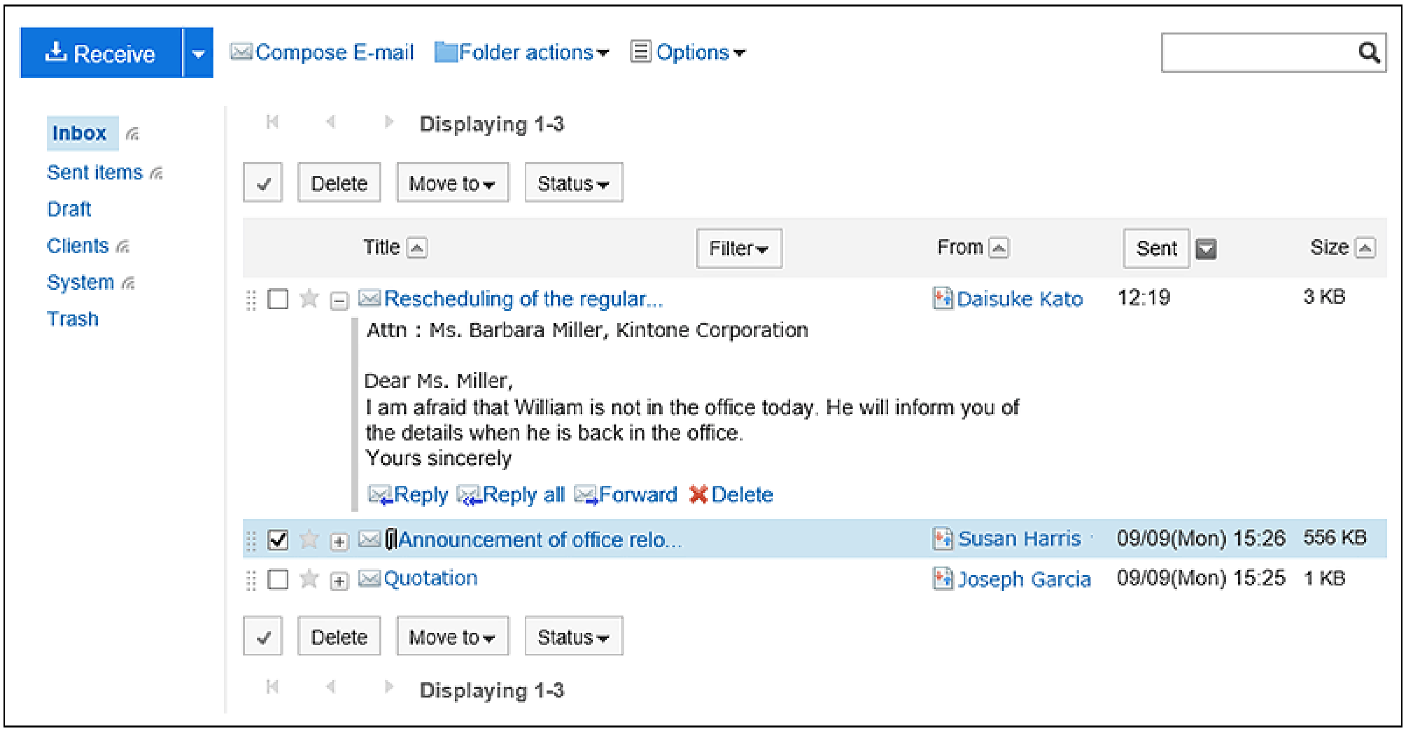
7. Confirm your settings and click "Save".

Setting to Allow Users to Use E-Mail Preview

Select the settings to allow users to use on the "E-mail" screen.
When you select to use both 2 panes and 3 panes screen, users can select to show or hide the preview in "Options" field on "E-mail" screen.

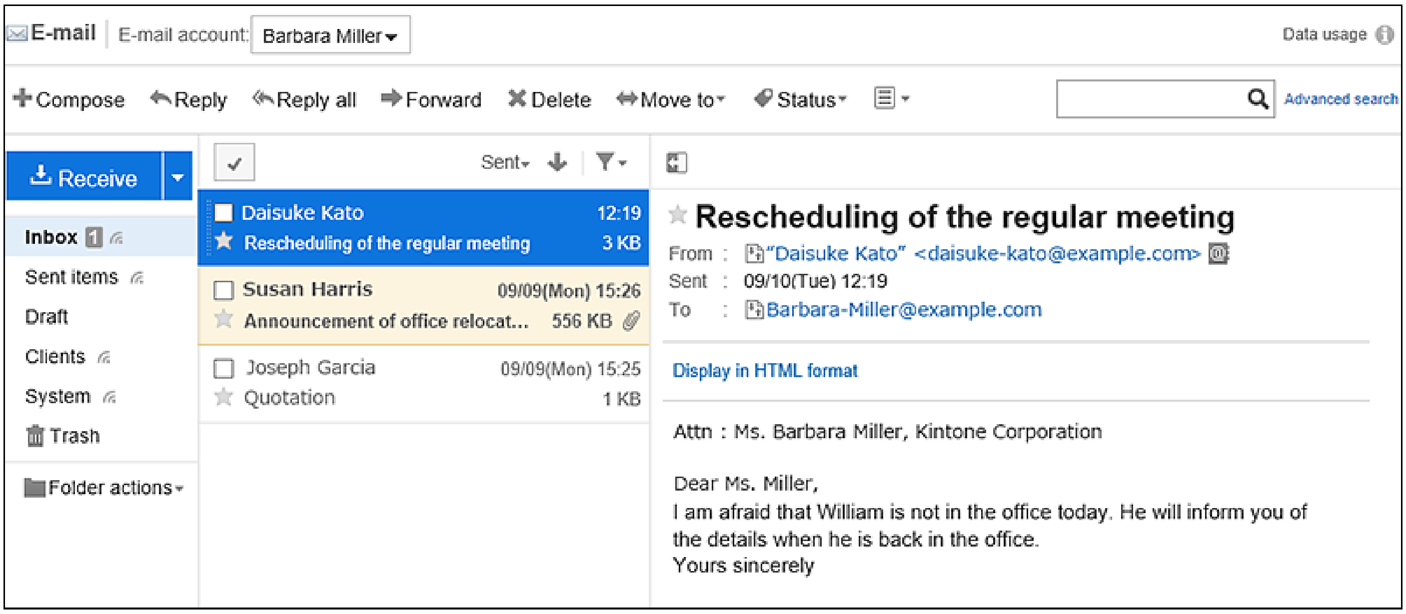
2 panes (without preview)

The "E-mail" screen displays folders and a list of e-mails in the folder.
When you click the "+" icon next to the e-mail subject, the body of the e-mail is displayed.



3 panes (with preview)

The user's "E-mail" screen displays folders, a list of e-mails in the folder, and a preview for the selected e-mail.



Steps:

1. Click the administration menu icon (gear icon) in the header.

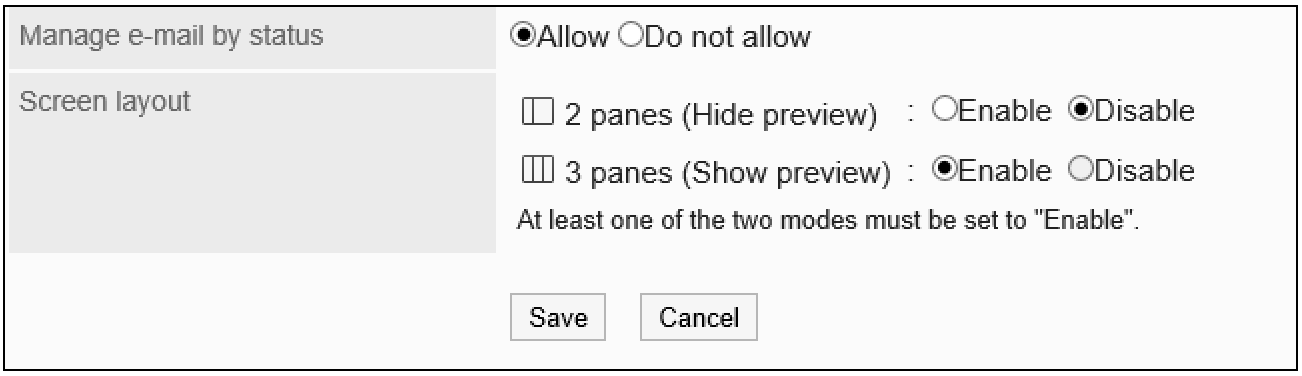
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "E-mail".

5. Click "General Settings".

6. In the e-mail page setting field on "General settings" screen, select the settings for the "E-mail" screen.



7. Confirm your settings and click "Save".

2.12.2. Setting up an E-Mail Server

Garoon has no e-mail server features. If you want to send and receive e-mails, you need e-mail servers for this purpose.
Garoon supports the following mail servers:

- **Protocol**
  - SMTP, POP3, or IMAP4
  - SMTP/POP3/IMAP4 over TLS
  - SMTP STARTTLS
    STARTTLS supports only SMTP.
- **Authentication method**
  - APOP
  - POP before SMTP
  - SMTP Authentication
  - Advanced authorization (OAuth 2.0) for Gmail and Exchange Online:
    Available in Garoon version 5.5.1 or later.
    After you configure an e-mail server with specifying the OAuth client in System Administration, users can use the advanced authorization (OAuth 2.0) to send/receive emails by performing the authorization in their "E-mail account details" screen.

Caution

- **To Use IMAP Servers:**
  If you want to use an IMAP server as the e-mail server, you need consider the following points:
  - When you receive e-mails using an IMAP server, only unread e-mails in INBOX folder retrieved.
  - Enable the Leave E-mail on incoming mail server setting.
    If you select not to leave e-mails on incoming e-mail server, e-mails are deleted from the server when the user receives e-mails.
    If users use other e-mail clients in combination with Garoon, e-mails received in Garoon cannot be received in other e-mail clients.
- You cannot use OAuth authentication if you are not using HTTPS for running Garoon.

Note

- Sent and received e-mails are saved in Garoon.

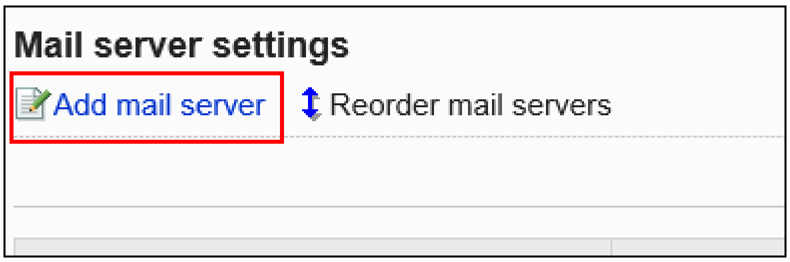
Adding E-Mail Servers

Add a configured e-mail server as an e-mail server for sending and receiving e-mails in Garoon.

You can add multiple e-mail servers.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "Mail server settings".**
6. **On "Mail server settings" screen, click to "Add mail server".**

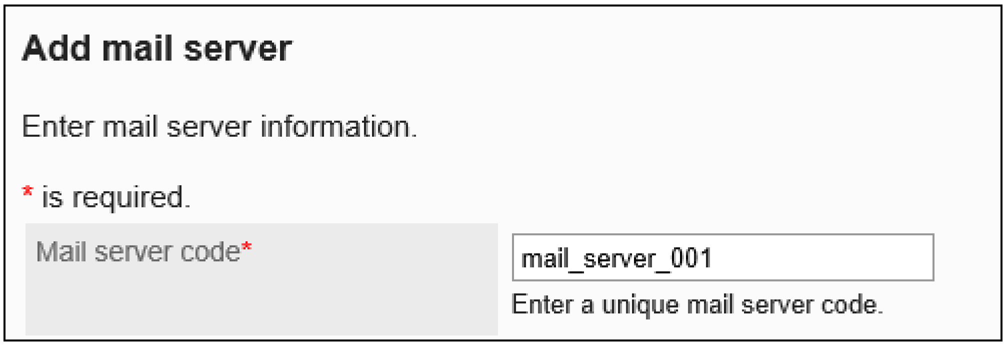


7. **On the screen to add mail servers, enter the e-mail server code.**

   You must set the mail server code.

   It is an unique code for identifying e-mail servers.

   Even if more than one server has the same mail server name, they are recognized as individual servers because they have their own mail server codes .



8. **Enter a name for an e-mail server.**

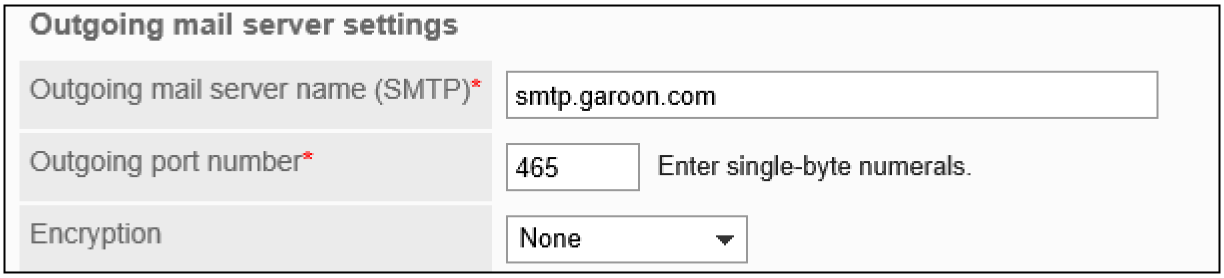
You must set the mail server name.

The names entered here will be displayed in the drop-down list on the e-mail servers of "Create e-mail account" screen or "Editing E-mail Accounts" screen.

9. **Set whether to use OAuth to send/receive e-mails.**

You need to configure OAuth to use Gmail/Exchange Online account(1180Page).

10. **Set up the outgoing mail server information.**



Outgoing E-Mail Server Setting Fields

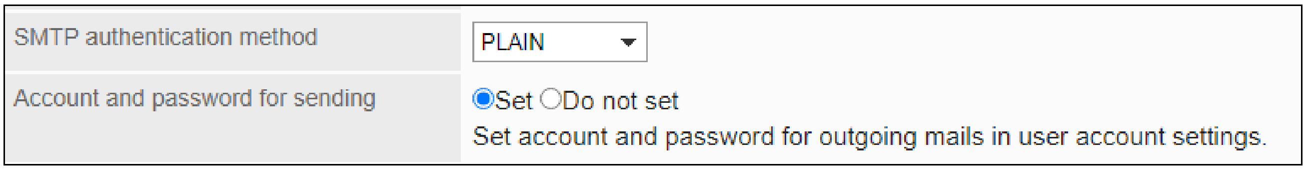
Outgoing mail server name (SMTP)	You must set the outgoing e-mail server name. Example: smtp.example.com The protocol used to send e-mail is SMTP.
Outgoing port number	The outgoing e-mail server port number must be set. Enter the port number of the outgoing e-mail server with single-byte numbers.
Encryption method	Set the encrypted communication method for the outgoing mail server. To encrypt communications with the outgoing mail server, select one of the following depending on your communication method: • Use TLS • Use STARTTLS Select "None" not to encrypt communications with the outgoing mail server.

11. Optionally, set SMTP authentication or POP before SMTP authentication.

You can use one of them as your authentication method. You cannot use both SMTP Authentication and POP before SMTP authentication at the same time.

SMTP Authentication Settings

Set if the outgoing e-mail server supports SMTP authentication.

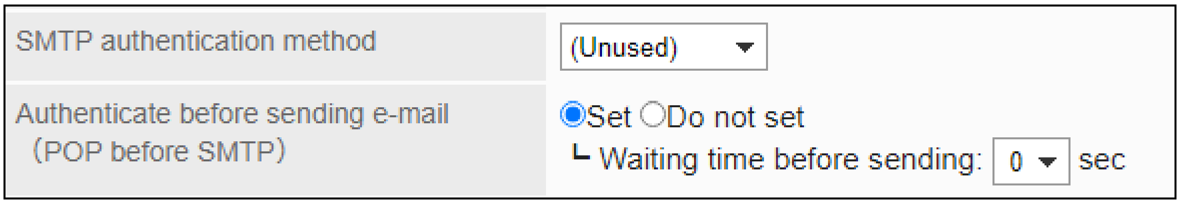


SMTP authentication method	Select the authentication method for SMTP authentication. From the drop-down list, select from the following authentication methods: • PLAIN • LOGIN • CRAMMD5 • DIGEST-MD5
Account names and passwords for sending	This appears when you select other than "(Unused)" in "SMTP authentication method" field. You can select one of the following options:

	• Set: The account name and the password set for the user account will be used for authentication. • Do not set: Incoming e-mail account and its password are used for authentication.

Settings for POP before SMTP Authentication

Set if the outgoing e-mail server supports POP before SMTP authentication.

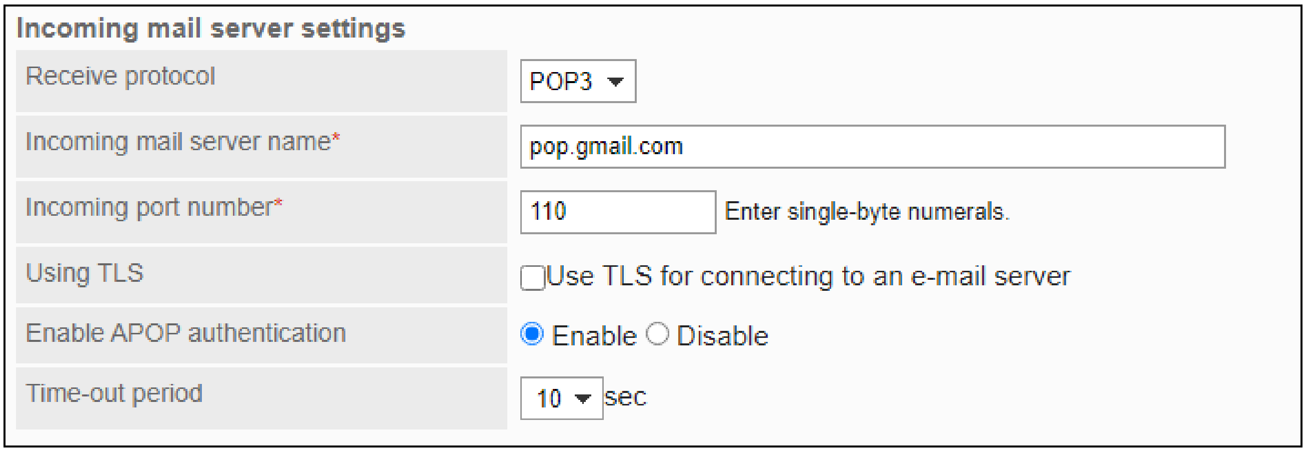


SMTP authentication method	Select "None".
Authenticate before sending e-mail (POP before SMTP)	Set whether to send after receiving. You can select one of the following options: • If you set it: If you select to set this option, you also set the the number of seconds to wait before sending. From the drop-down list, select from 0 second to 10 seconds. • Do not set

12. Set "Time-out period" field.

Select the number of seconds to wait before communication with the outgoing e-mail server times out. You can set the value from 10 seconds to 120 seconds.

13. Set the incoming e-mail server information.



Items of Incoming E-Mail Server Settings

Protocol for incoming e-mails	Select one of the following: • POP3 • IMAP4
Incoming mail server	You must set the incoming e-mail server name. Example: pop.example.com
Incoming port number	You must set the incoming e-mail server port number. Enter the port number of the incoming e-mail server with single-byte numbers.
Using TLS	If you use POP3 over TLS for communication between the incoming mail server and Garoon, select the check box for using TLS for communicating with the mail server.
Enable APOP authentication	If you use APOP authentication when receiving e-mails, select "Enable".
Time-out period	Select the number of seconds to wait before communication with the incoming e-mail server times out. You can set the value from 10 seconds to 120 seconds.

14. Confirm your settings and click "Add".

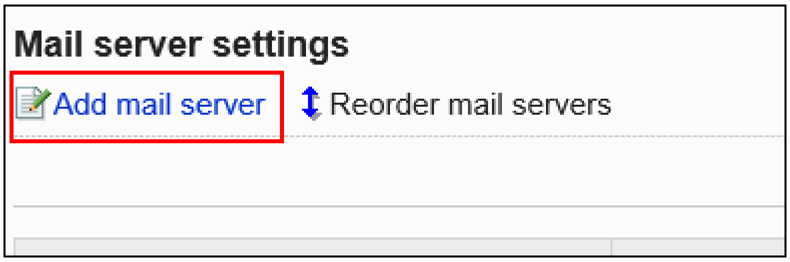
Using Gmail/Exchange Online Account

This section describes how to use a Gmail or Exchange Online account in Garoon.

You need to configure an OAuth client(1214Page) before adding a server. Add an e-mail server after configuring an OAuth client.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "Mail server settings".**
6. **On "Mail server settings" screen, click to "Add mail server".**

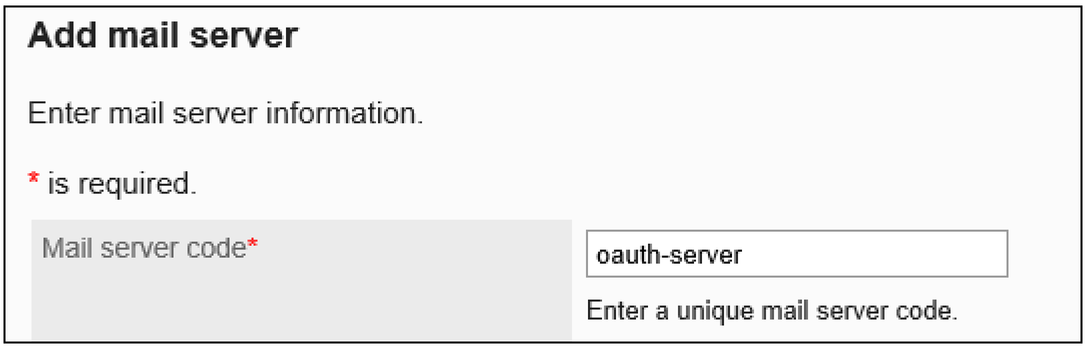


7. **On the screen to add mail servers, enter the e-mail server code.**

You must set the mail server code.

It is an unique code for identifying e-mail servers.

Even if more than one server have the same mail server name, they are recognized as individual servers because they have their own mail server codes.

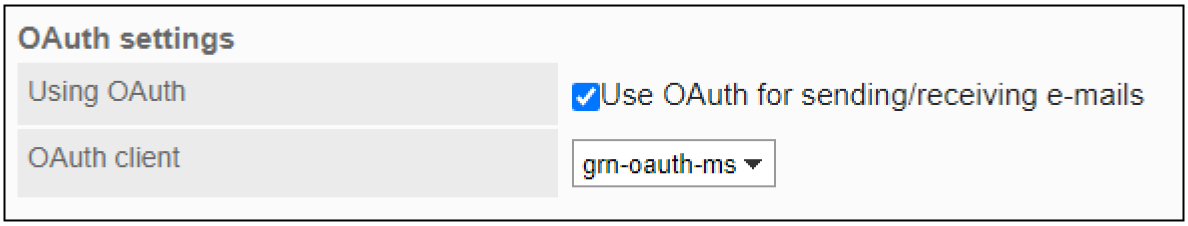


8. **Enter a name for an e-mail server.**

You must set the mail server name.

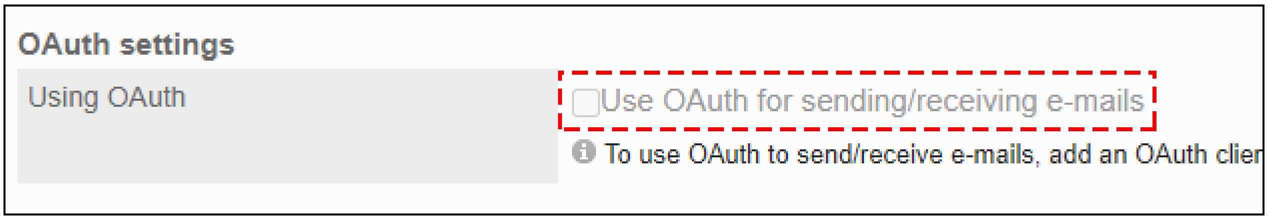
The names entered here will be displayed in the drop-down list on the e-mail servers of "Create e-mail account" screen or "Editing E-mail Accounts" screen.

9. In "OAuth settings", select the "Use OAuth for sending/receiving e-mails" check box and choose the OAuth client.



You cannot select the "Use OAuth for sending/receiving e-mails" check box if an OAuth client is not configured.

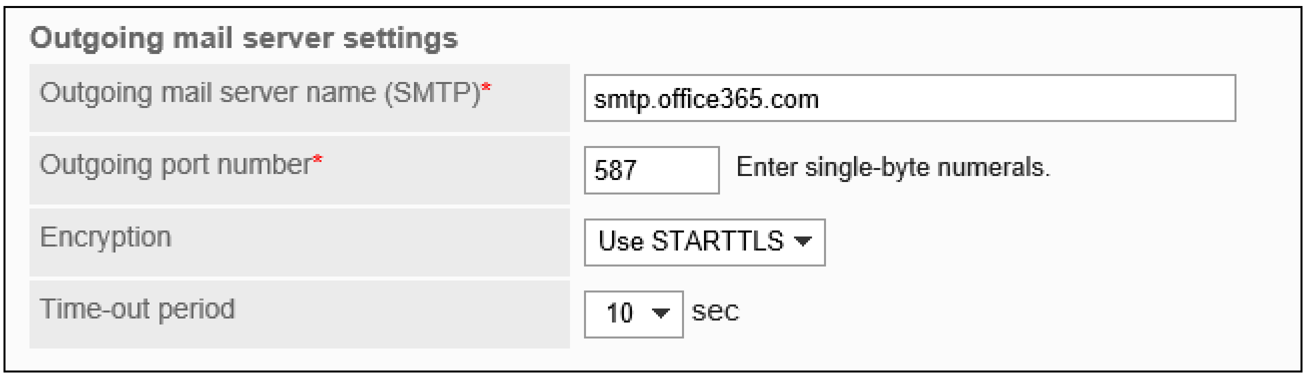
Refer to "Configuring OAuth Clients(1214Page)" to add an OAuth client.



10. Change the following settings of the outgoing mail server as necessary.

- Time-out Period:
  Select the number of seconds to wait before communication with the outgoing e-mail server times out.
  You can set the value from 10 seconds to 120 seconds.

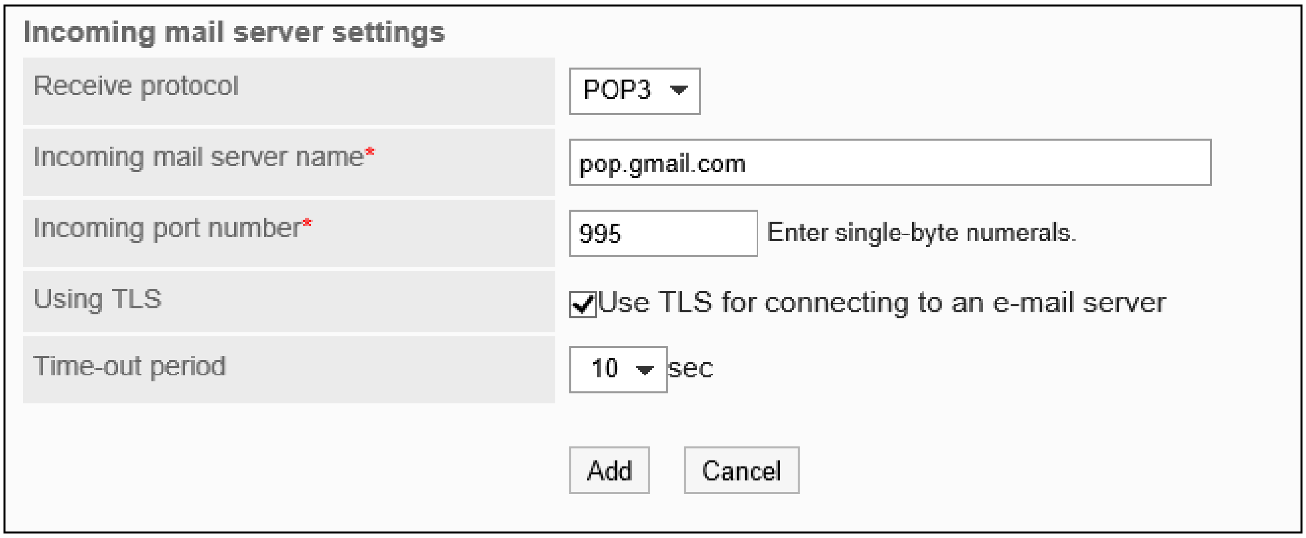
"Outgoing mail server name", "Outgoing port number", and "Encryption" are set automatically.



11. Change the following settings of the incoming mail server as necessary.

- Protocol for incoming e-mails:
  Select one of the following:
  - POP3
  - IMAP4
- Time-out Period:
  Select the number of seconds to wait before communication with the incoming e-mail server times out.
  You can set the value from 10 seconds to 120 seconds.

The "Incoming mail server name", the "Incoming port number", and the "Using TLS" fields are configured automatically.



11. Confirm your settings and click "Add".

Changing E-Mail Servers

Change the information on the e-mail servers.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

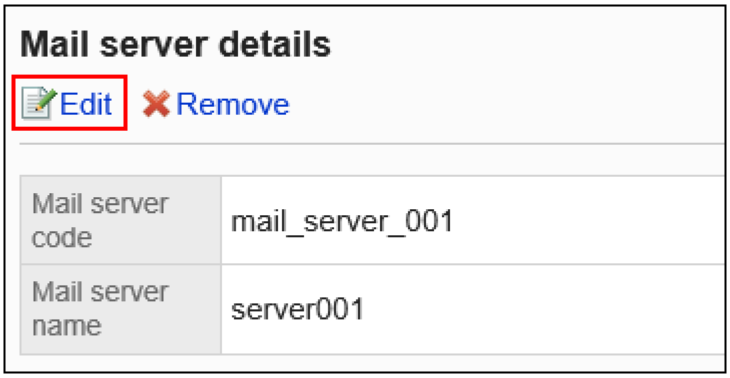
3. Select "Application settings" tab.

4. Click "E-mail".

5. Click "Mail server settings".

6. **On the e-mail server setting screen, select the e-mail server to change its settings.**

7. **On the screen to set e-mail server details, click "Save".**



8. **On the screen to change e-mail server settings, change the settings as necessary.**

   For details on the settings, refer to Adding E-Mail Servers.

9. **Confirm your settings and click "Save".**

Reordering E-Mail Servers

Change the order of mail servers displayed on the following screens:

- "Mail server setting" screen
- "Create user account" screen
- "Edit user account" screen

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

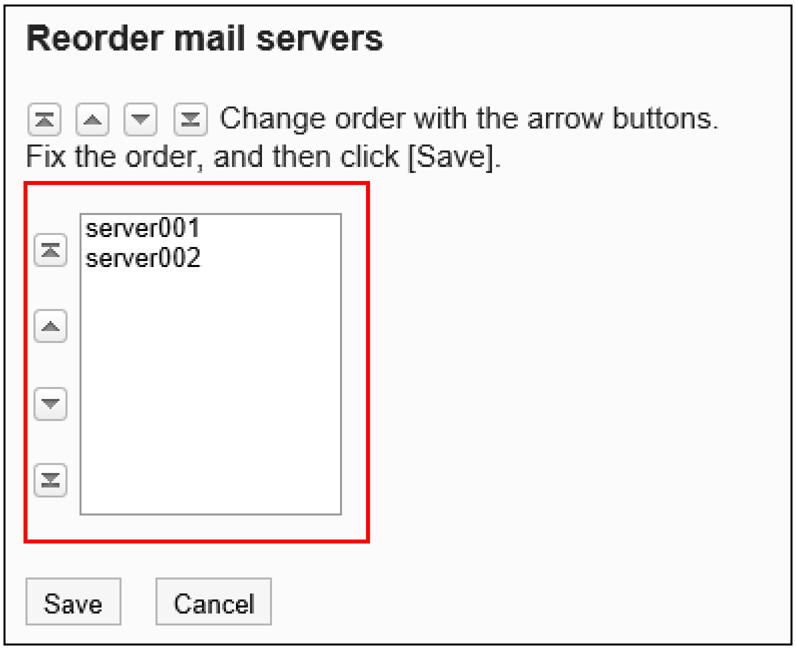
3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click "Mail server settings".**

6. **On the e-mail server setting screen, click "Reorder mail servers".**

7. On the reordering e-mail servers screen, reorder the mail servers.

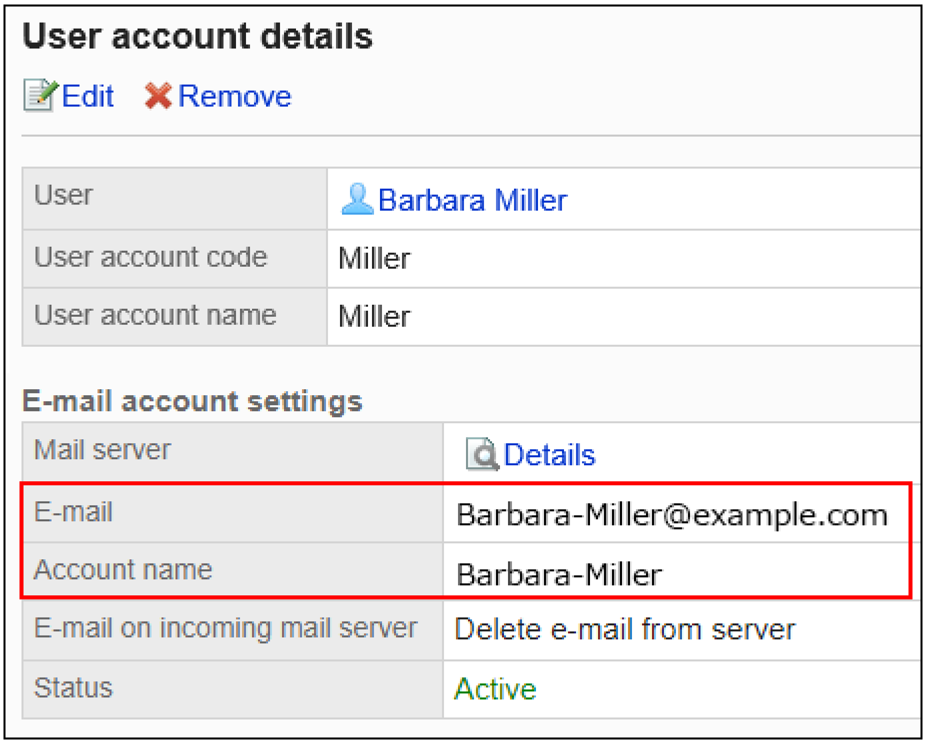


8. Confirm your settings and click "Save".

Deleting E-Mail Servers

Delete e-mail servers.

Deleing e-mail servers does not delete the information on e-mail servers stored for user accounts.



If necessary, change the user account settings.

For details, refer to Changing User Accounts(1192Page).

Caution

- After deleting e-mail servers, they cannot be restored.

Deleting E-Mail Servers One by One

Delete e-mail servers one at a time.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

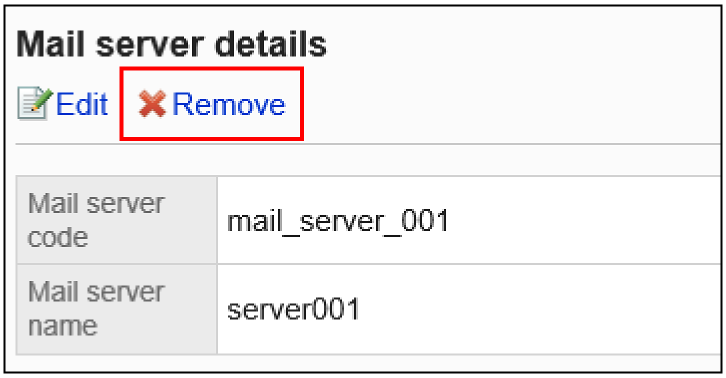
3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click "Mail server settings".**

6. **On the e-mail server setting screen, select the e-mail server to delete.**

7. **On the screen to set e-mail server details, click "Delete".**



8. **Click "Yes" on the deleting e-mail servers screen.**

Deleting All E-Mail Servers

Delete all e-mail servers.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

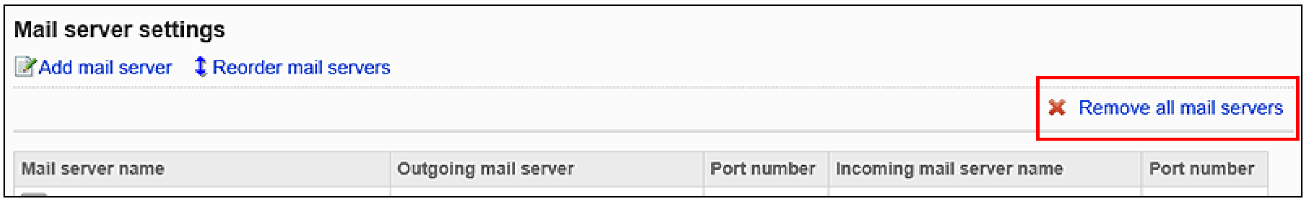
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click "Mail server settings".**

6. **On the e-mail server setting screen, click to delete all e-mail servers.**



7. **Click "Yes" on the deleting all e-mail servers screen.**

2.12.3. User Account Settings

User accounts mean accounts used to send and receive e-mails. Users use the user accounts set as their e-mail accounts.
Users who have multiple accounts can select an e-mail account to send and receive e-mails.
You can also use a CSV file to manage user accounts in bulk.
For details, see Managing E-Mails Using CSV Files(1210Page).

Caution

- OAuth authentication is not available for Microsoft personal accounts. Use work accounts or school accounts.

Adding User Accounts

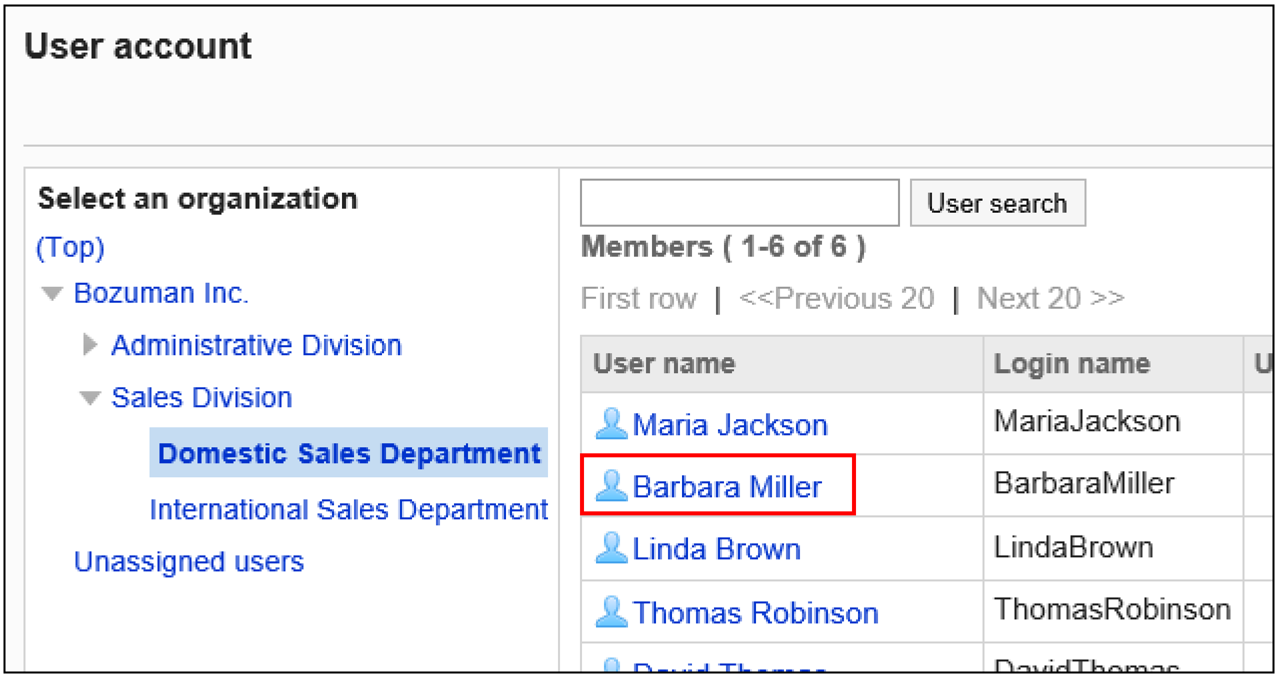
Add an account for each user.
You can set up multiple user accounts for one user.

Steps:

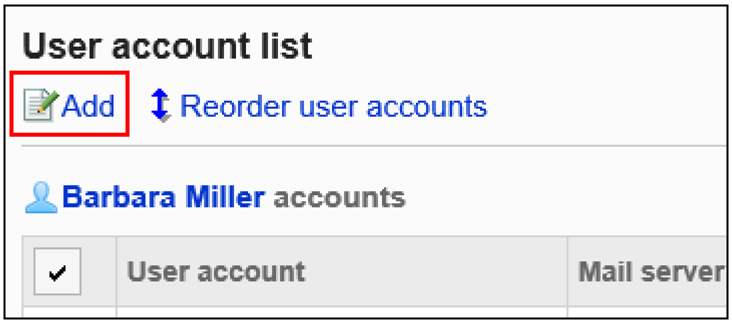
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**

5. **Click "User Accounts".**

6. **On the "User Accounts" screen, select a user.**



7. **On the user account list screen, click "Create e-mail account".**

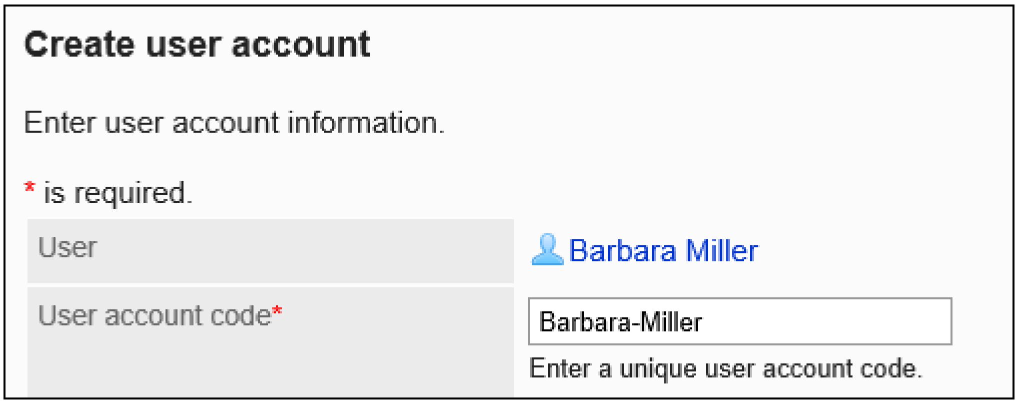


8. **On the "Create e-mail account" screen, enter a user account code.**

You should set the user account code.

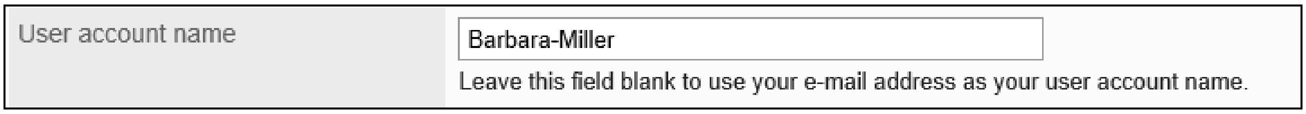
It is a unique code for identifying user accounts.

Even if you use the same user account name to multiple user accounts, they are recognized as a separate user account because their user account codes differ.

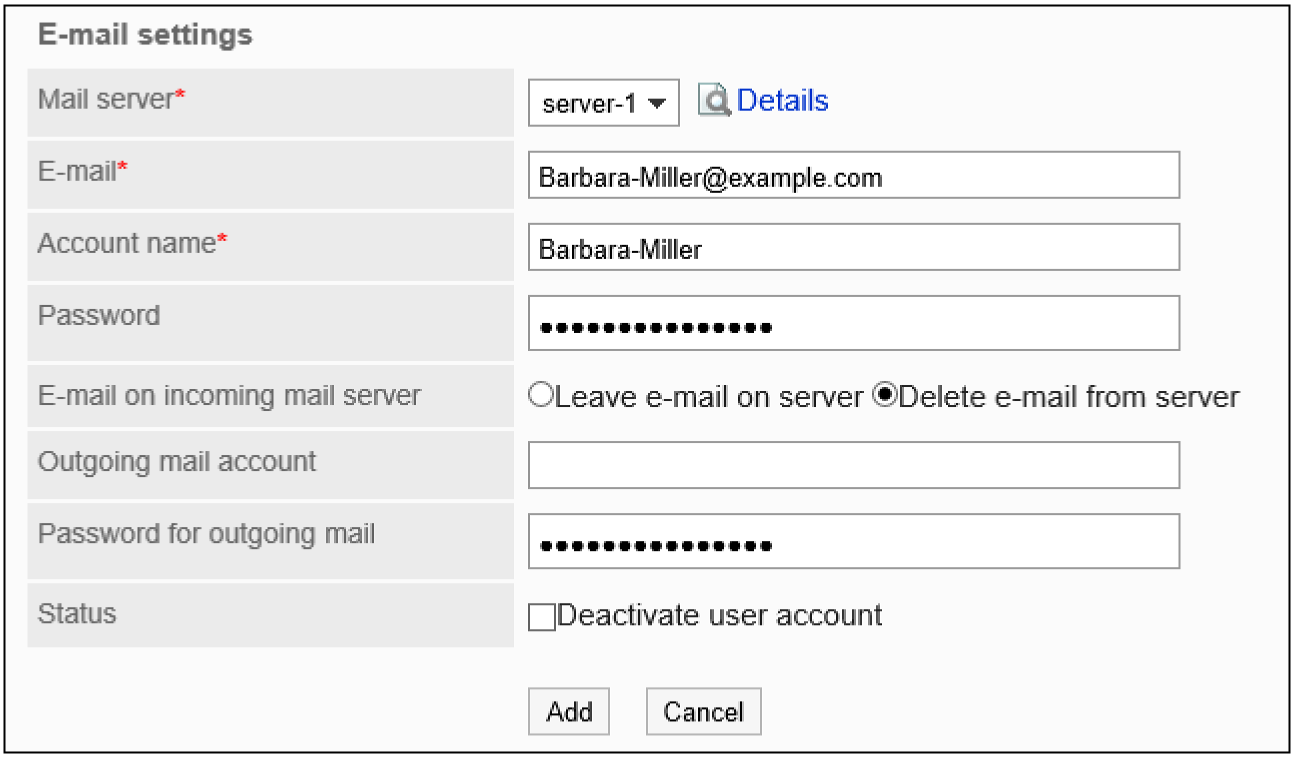


9. **In "User account" field, enter a name of the user account.**

If you left it blank, the address entered in the "E-mail" field is used as the user account name.



10. **Set up an e-mail account.**



E-Mail Account Setting Fields

Mail Servers	You must set up an e-mail server. Before adding e-mail accounts, you must set up the e-mail server.

	For details, refer to Adding E-Mail Servers(1176Page). Click "Details" to check the details of the e-mail server.
E-mail	Enter the e-mail address to be used with the selected mail server. You must set the E-mail field. You can use the following characters: • a to z • A-Z • 0 to 9 • Symbols: * . ! # $ ' % & * + / = ? ^ _ ` {	} ~
Incoming e-mail account name	Enter the e-mail account to receive e-mails. You should set the Incoming e-mail account name filed.
Incoming e-mail password	Enter the password for the incoming e-mail account.
E-mail on incoming mail server	If you select "Leave E-mail on incoming mail server", it is shown on "General Settings" screen. Select whether to leave e-mails in the incoming mail server. Select "Delete e-mail from server" if you do not want to leave e-mails on incoming e-mail servers.
Outgoing e-mail account name	If you select a mail server that has been configured for SMTP authentication in "Mail Servers" field, it is shown that the server sets an account and a password for sending. Enter the e-mail account set for the outgoing mail server.
Outgoing e-mail password	If you select a mail server that has been configured for SMTP authentication in "Mail Servers" field, it is shown that the server sets an account and a password for sending. Enter the password for the e-mail account set for the outgoing mail server.
Status	If you do not want the account to use the e-mail account shown, select the "Deactivate" check box.

11. Confirm your settings and click "Add".

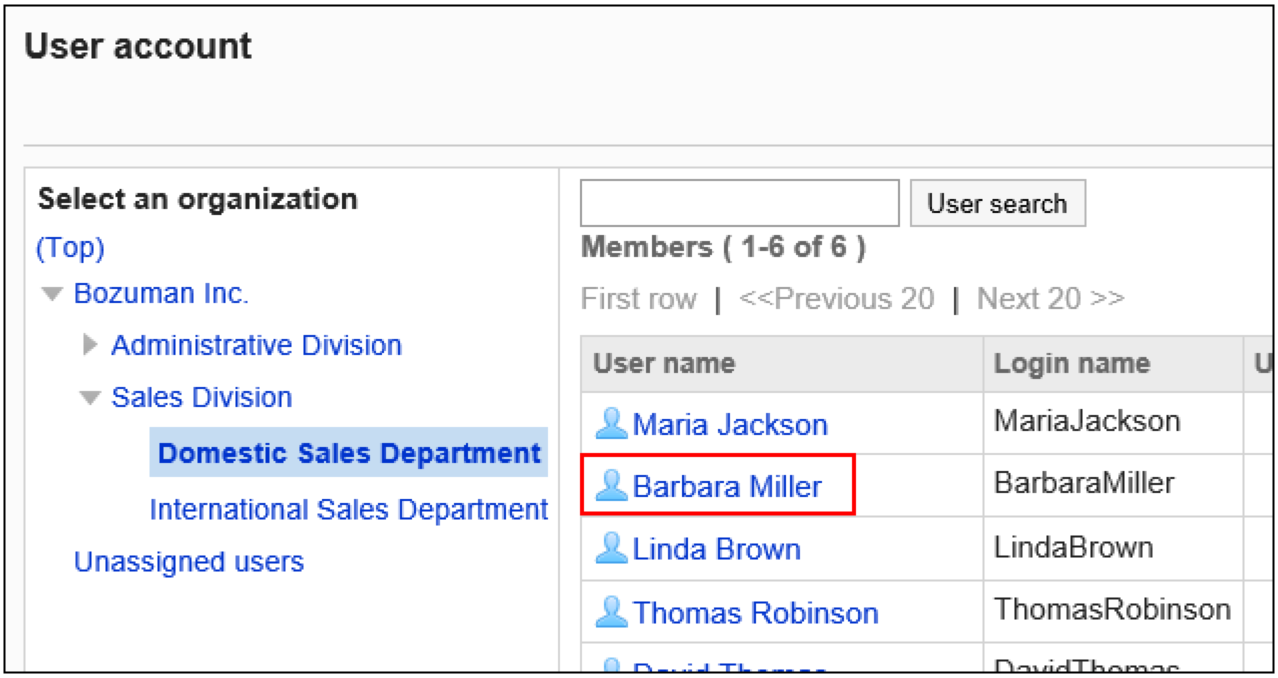
If users want to use Gmail or Exchange Online accounts in Garoon version 5.5.1 or later, the authorization by the users will be required to send and receive e-mails.
Contact users to perform OAuth authorization in the "E-mail account details" screen in Personal Settings.

Changing User Accounts

Change user account settings.

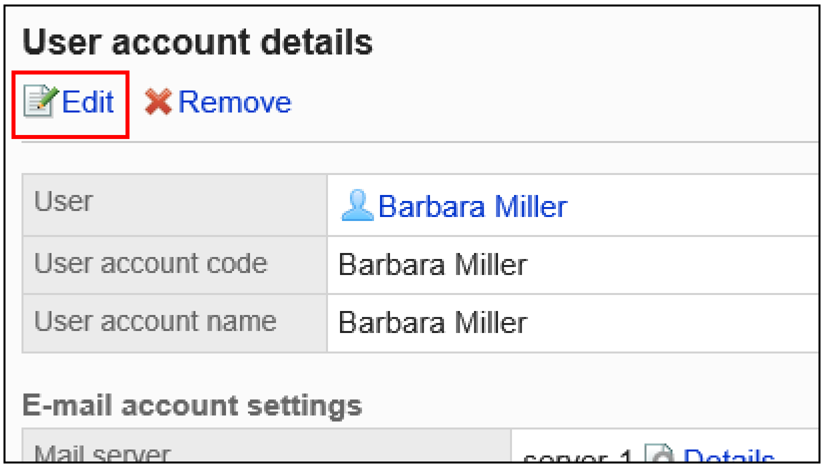
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "User Accounts".**
6. **On the "User Accounts" screen, select a user.**



7. **On the user account list screen, click the user account to change.**

8. **On the Details of User account screen, click "Edit".**



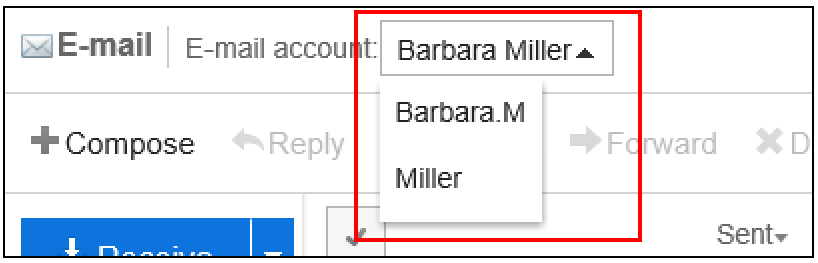
9. **On "Editing E-mail Accounts" screen, change the fields as necessary.**

   For details on the settings, refer to Adding User Accounts.

10. **Confirm your settings and click "Save".**

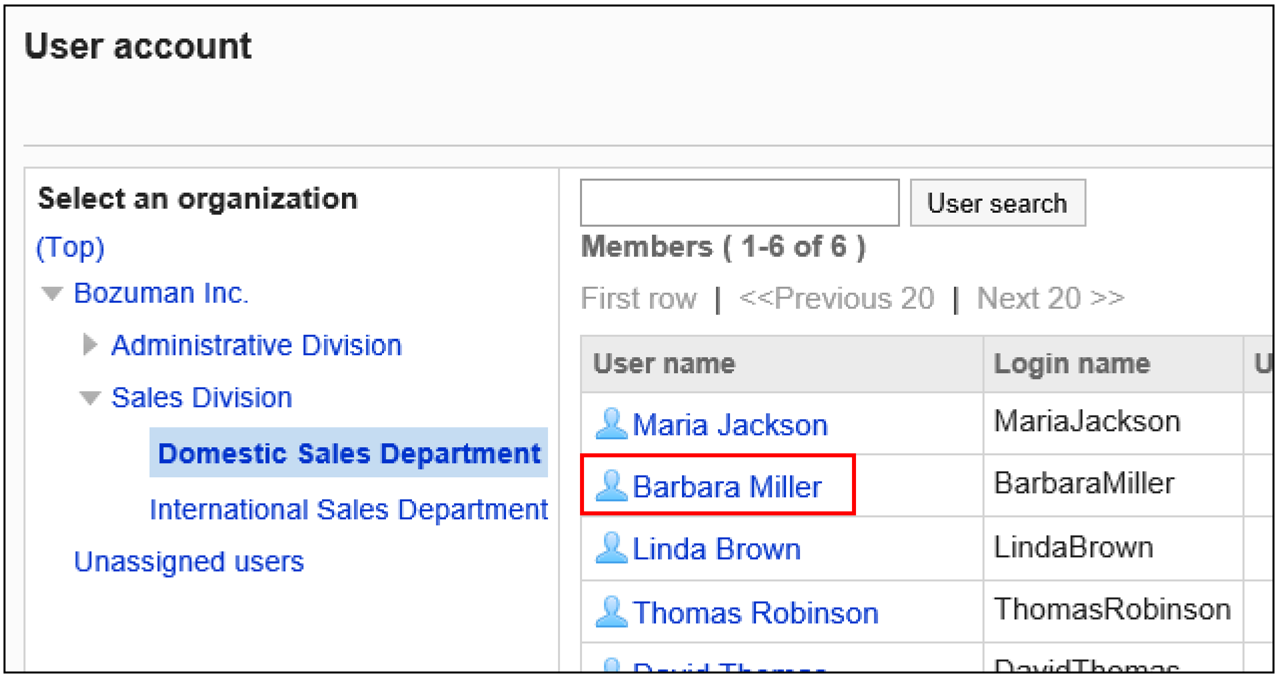
Reordering User Accounts

You can change the ordering of the user accounts shown on the user account list and in "E-mail" screen for users.
The order set in this procedure is applied to the order in which the drop-down list to selects e-mail accounts on the "E-mail" screen.
The user account shown at the top is the default e-mail account.

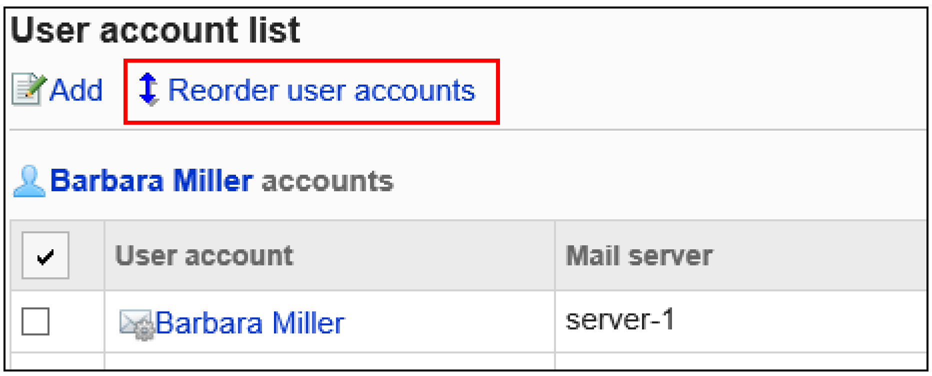


Steps:

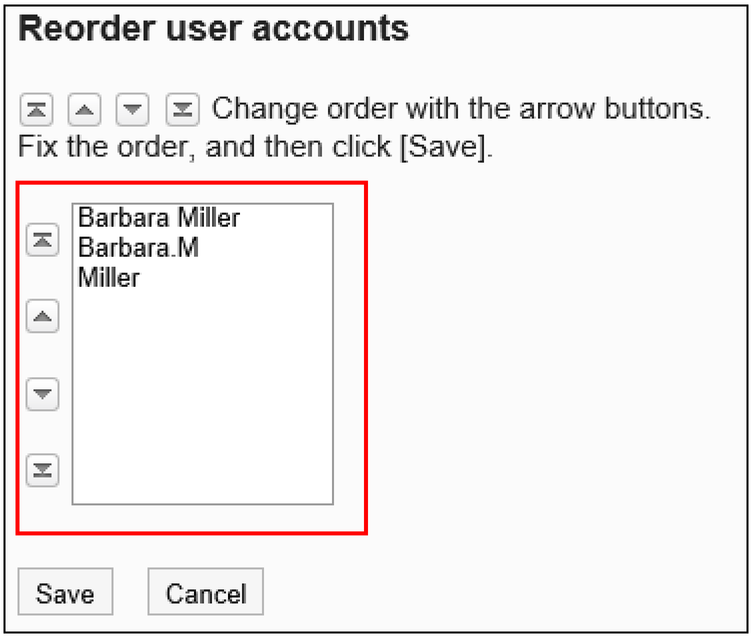
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "User Accounts".**
6. **On the "User Accounts" screen, select a user.**



7. **On the user account list screen, click "reorder user accounts".**



8. **On the reordering user accounts screen, reorder the user accounts.**

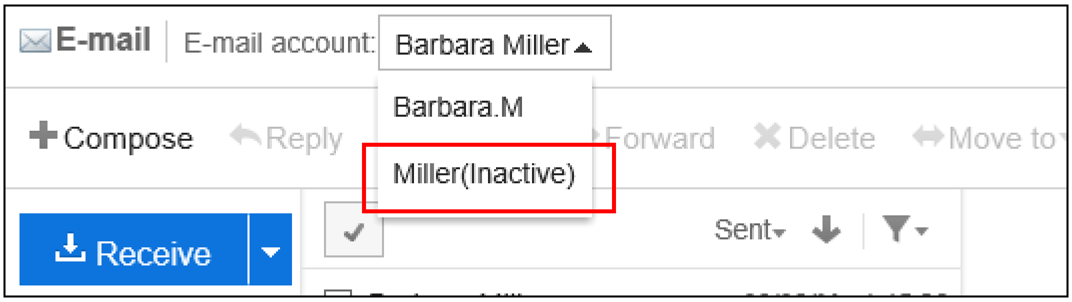


9. Confirm your settings and click "Save".

Deactivating User Accounts

To prevent users from using their e-mail without deleting their e-mail accounts, deactivate the user accounts.

Example of a deactivated user account:



Once an e-mail account is deactivated, you can no longer send or receive e-mails with the deactivated account.
E-mails that were sent or received before the account is deactivated remain in Sent items, Inbox, or other folders.

Deactivating User Accounts One by One

Deactivate user accounts one by one.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

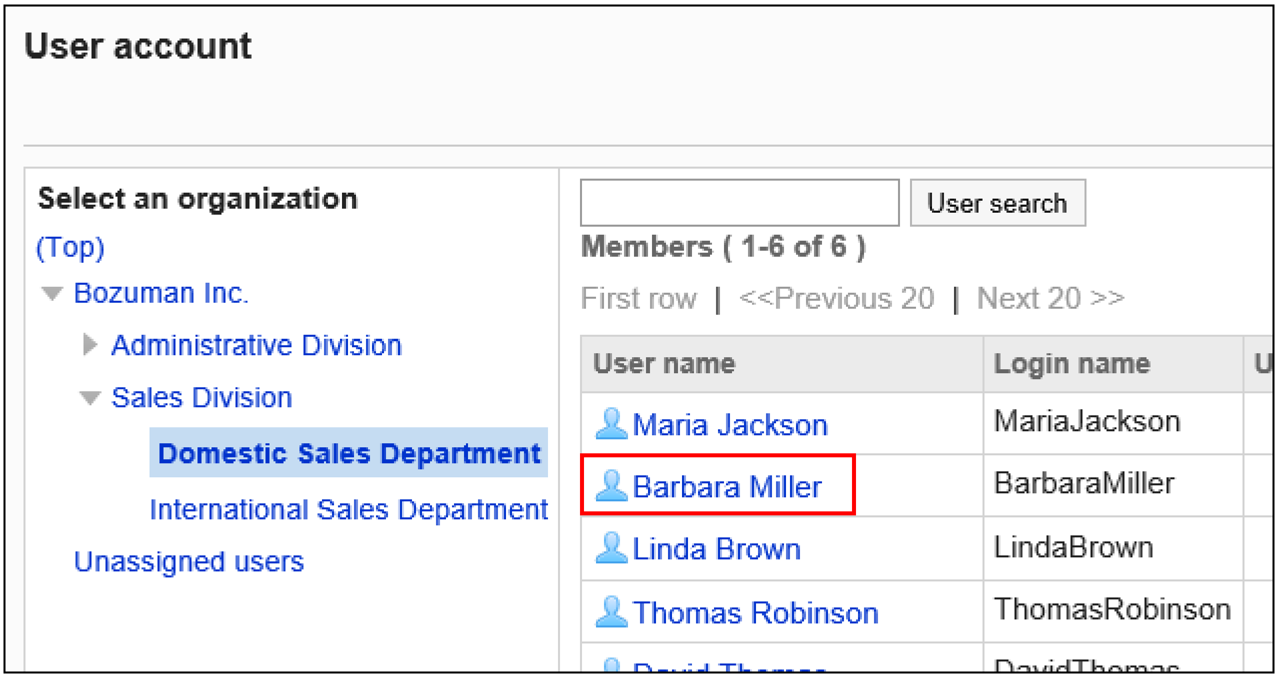
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

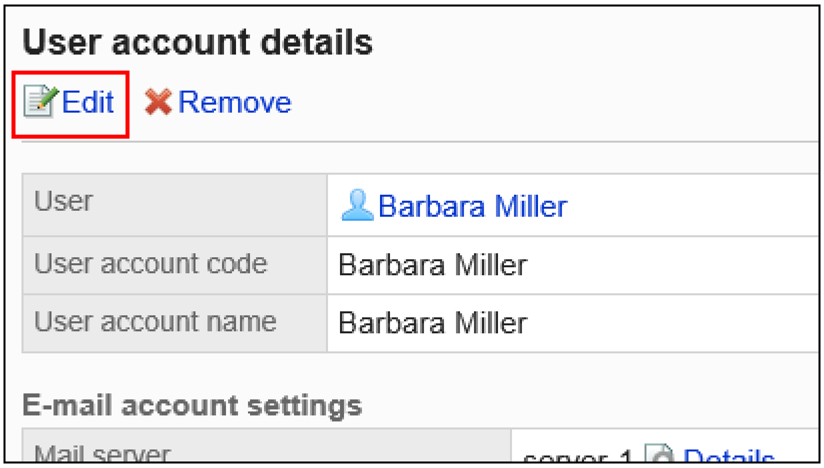
5. **Click "User Accounts".**

6. **On the "User Accounts" screen, select a user.**

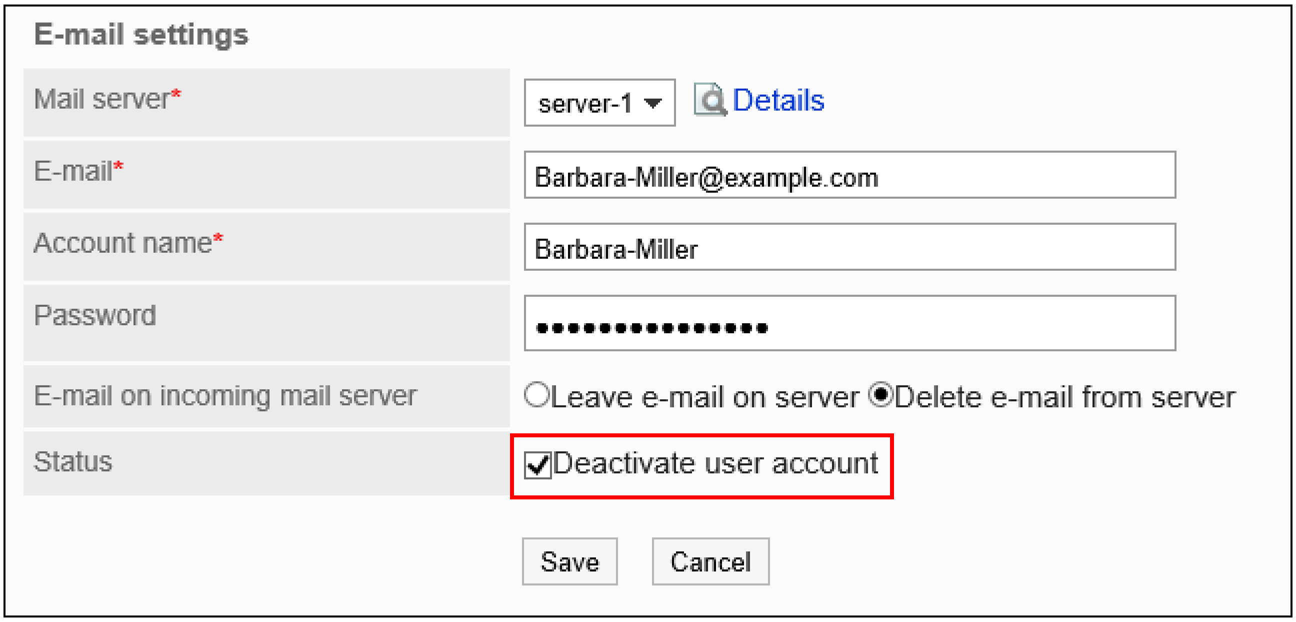


7. **On the user account list screen, select the user account of the user to deactivate.**

8. **On the Details of User account screen, click "Edit".**



9. In "Status" field on "Editing E-mail Accounts" screen, select the "Deactivate e-mail account" check box.



10. Confirm your settings and click "Save".

Note

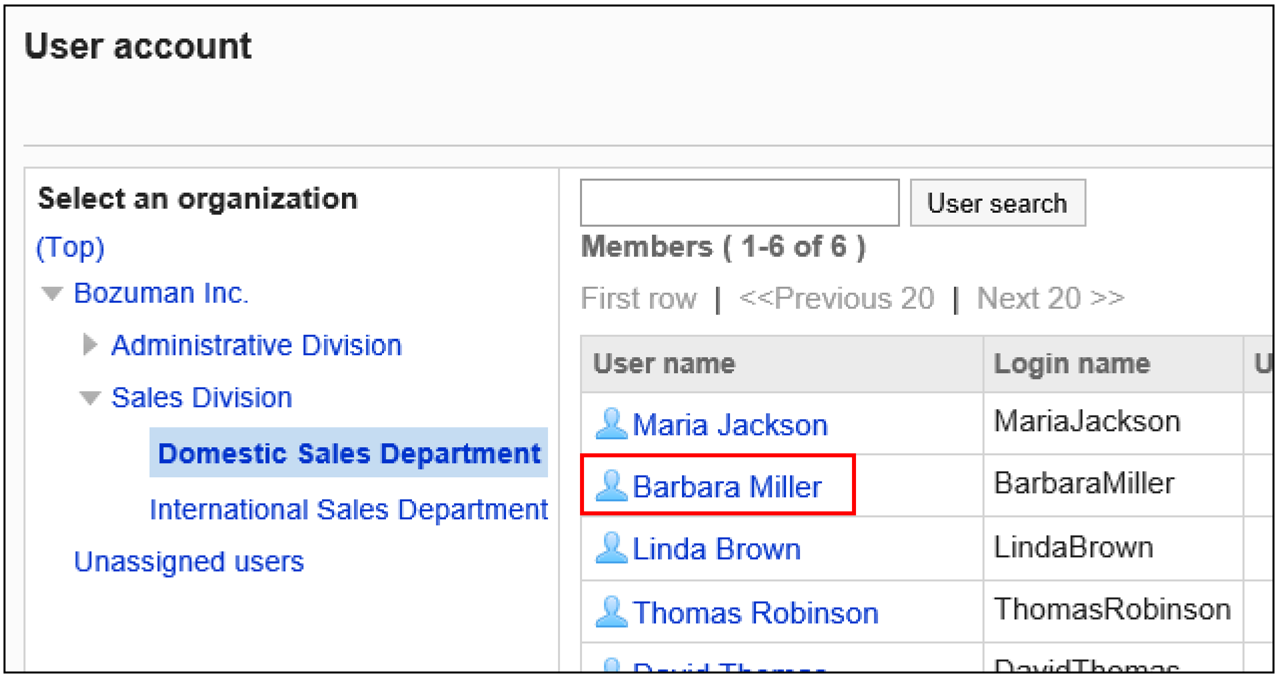
- To reactivate the deactivated user account, clear the "Deactivate e-mail account" check box on the "Editing E-mail Accounts" screen.
  When it is activated, the account starts to receive e-mails sent to the account in the e-mail server during it was deactivated.

Deactivating Multiple User Accounts in Bulk

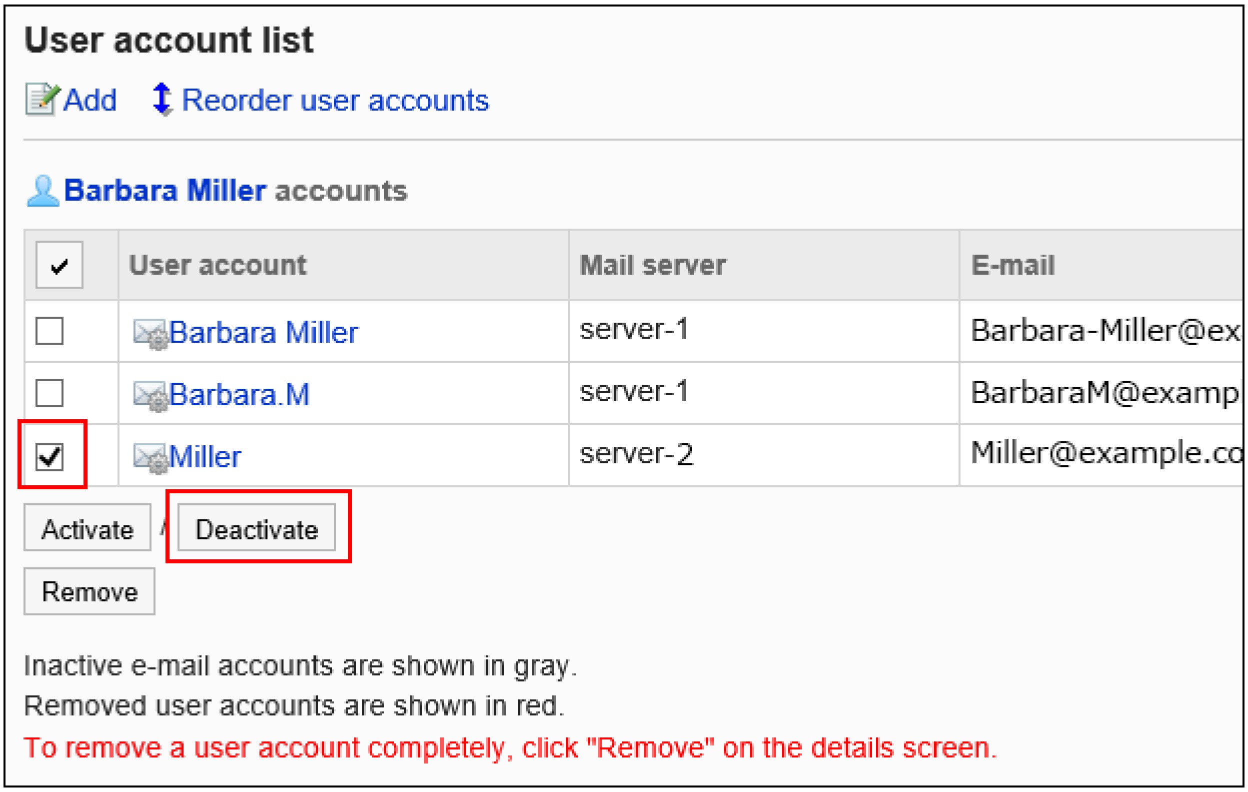
Select user accounts, and then deactivate them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "User Accounts".**
6. **On the "User Accounts" screen, select a user.**

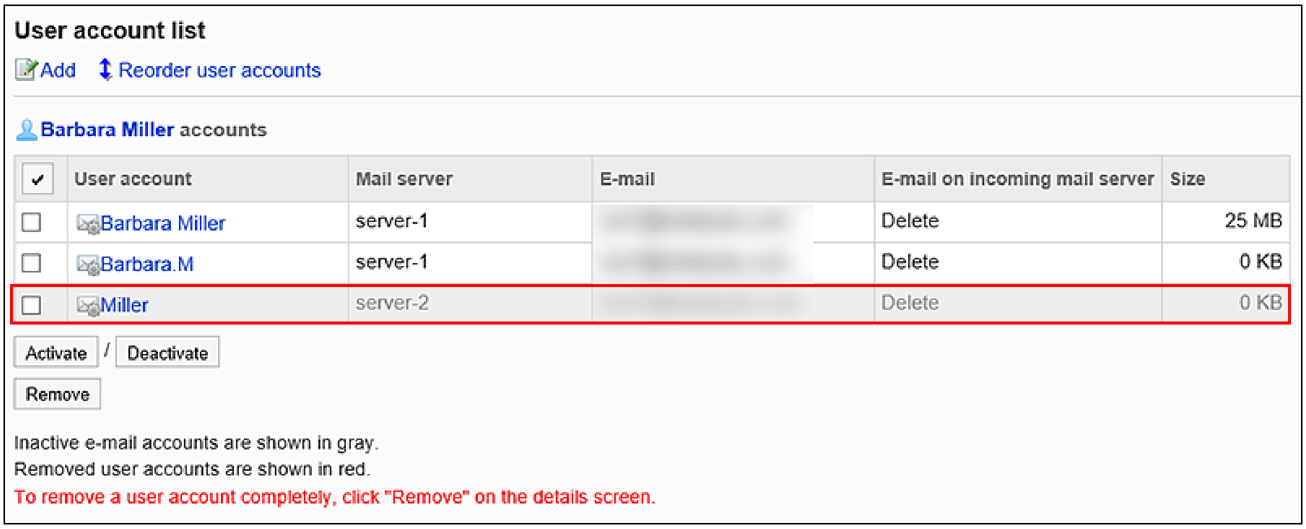


7. **On the user account list screen, select the check box of the user account to deactivate, and then click "Deactivate".**



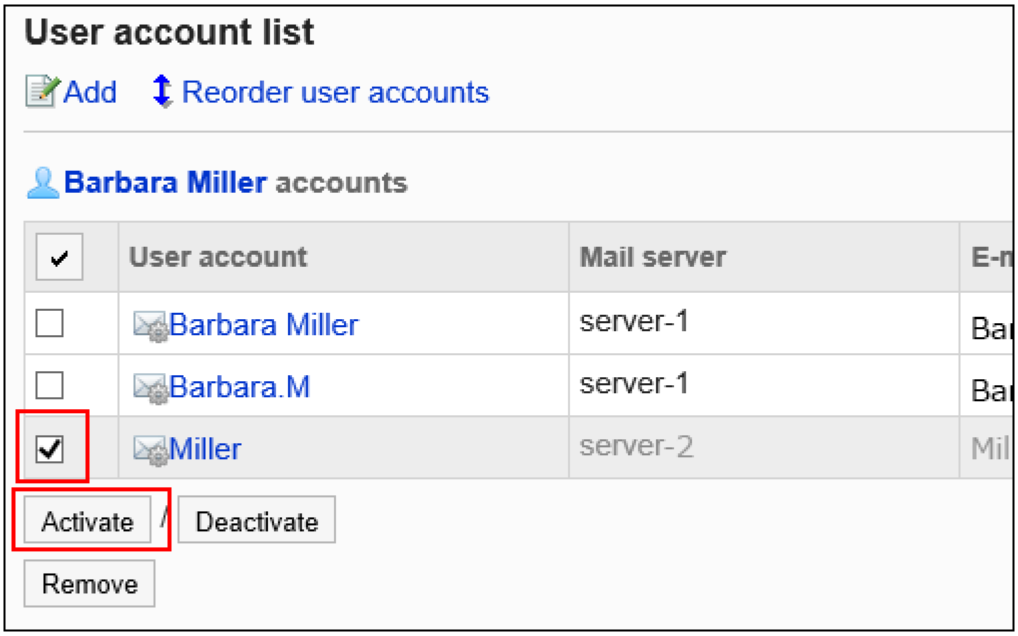
8. Click "Yes" on the deactivating all user accounts screen.

Inactive user accounts are grayed out on the user account list screen.



Note

- To reactivate the user account, select the check box of the user account to reactivate on the user account list screen, and then click "Enable". When it is activated, the account starts to receive e-mails sent to the account in the e-mail server during it was deactivated.

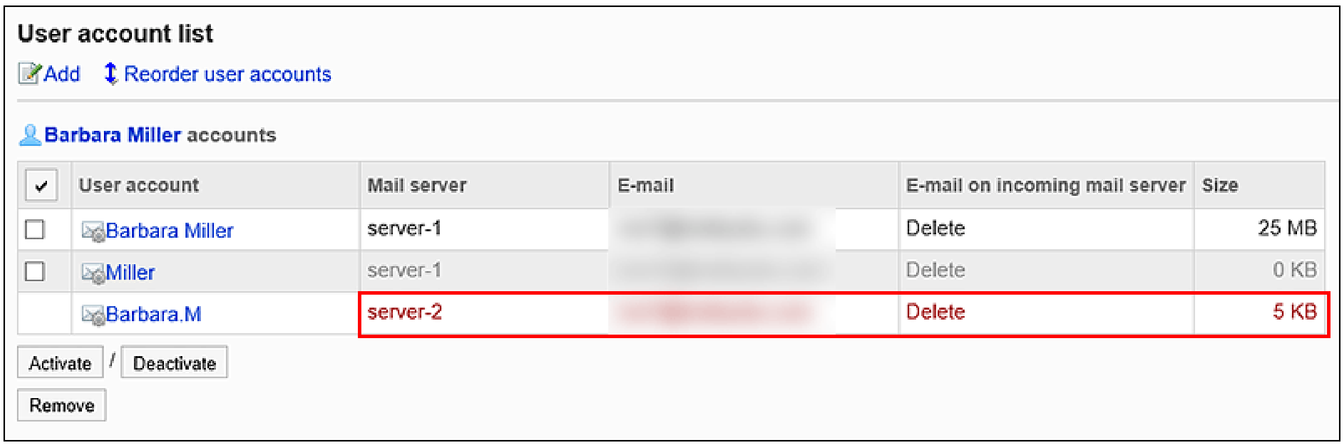


Deleting User Accounts

Delete a user account. After deleting user accounts, the accounts cannot send or receive e-mails.

When you delete a user account, you can also select whether to delete the e-mail data.

- **If you delete both the user account and the e-mail data:**
  You can use the same user account code as the deleted user account to add a new user account.
- **If you delete only the user account:**
  You cannot add a new user account using the same user account code as the deleted user account.
  The user accounts with e-mail data remains, the data for the user accounts are shown in red characters on the user account list screen.



Caution

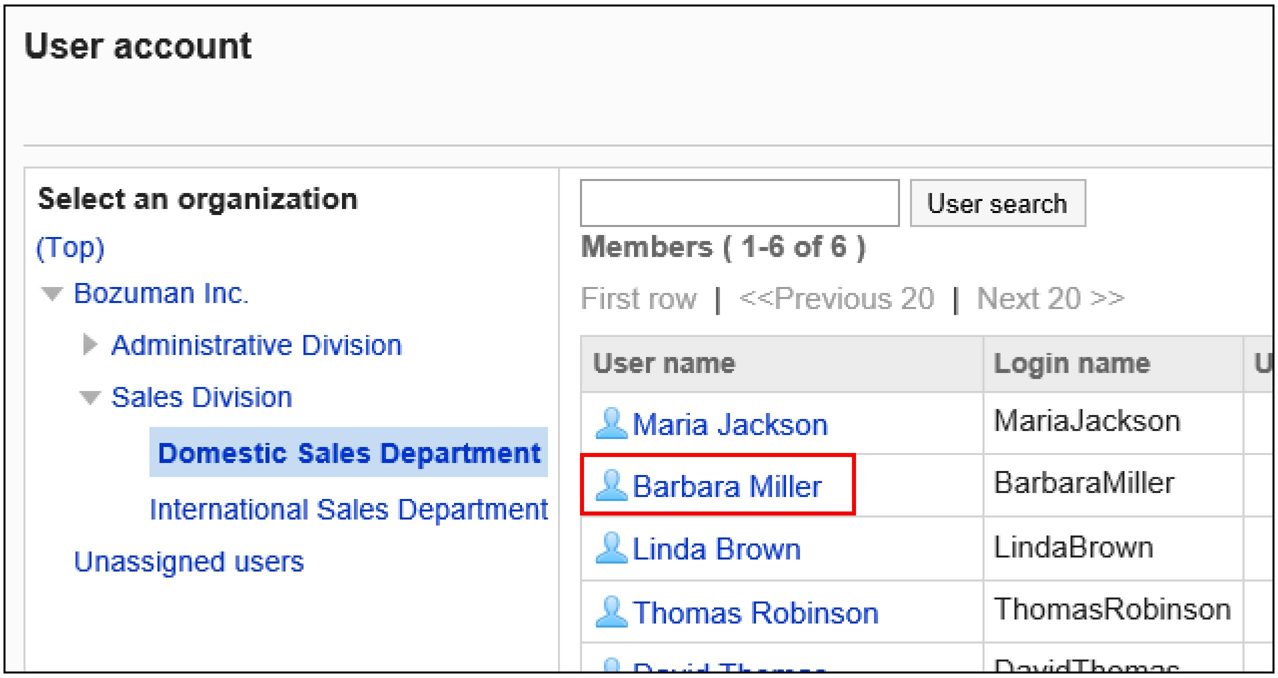
- After deleting user accounts and e-mail data, they cannot be restored.

Deleting User Accounts One by One

Delete user accounts one by one.

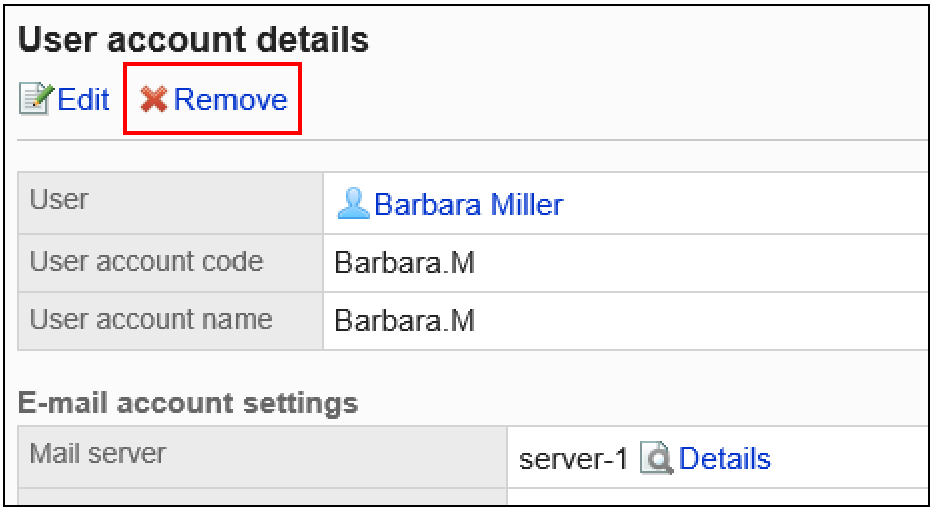
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "User Accounts".**
6. **On the "User Accounts" screen, select a user.**



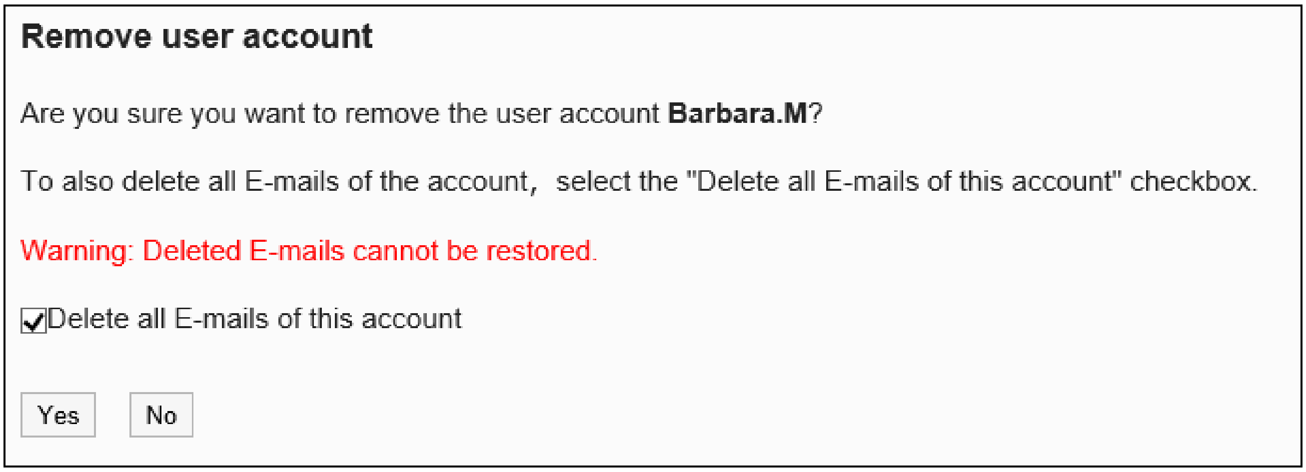
7. **On the user account list screen, select the user account to delete.**

8. **On the Details of User account screen, click "Delete".**



9. **Click "Yes" on the "Delete e-mail account" screen.**

To delete e-mail data, select the "Delete all E-mails of this account" check box.



Deleting Multiple User Accounts in Bulk

Delete multiple user accounts at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

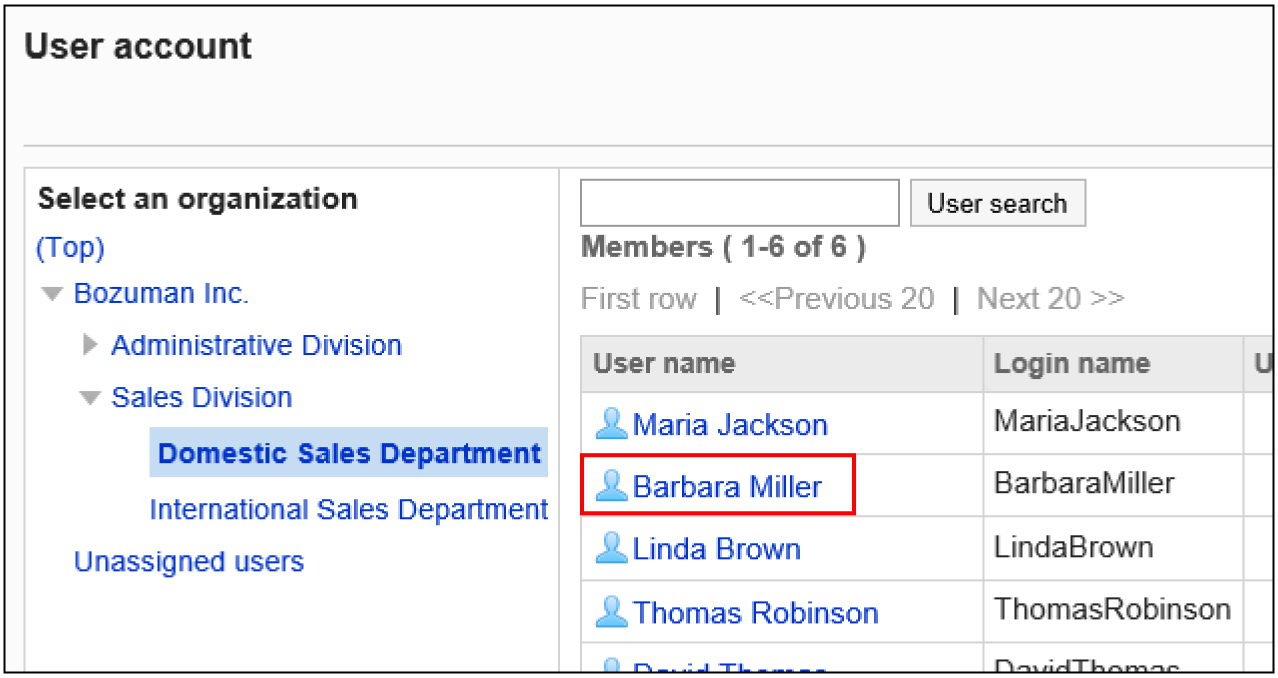
2. **Click "System settings".**

3. **Select "Application settings" tab.**

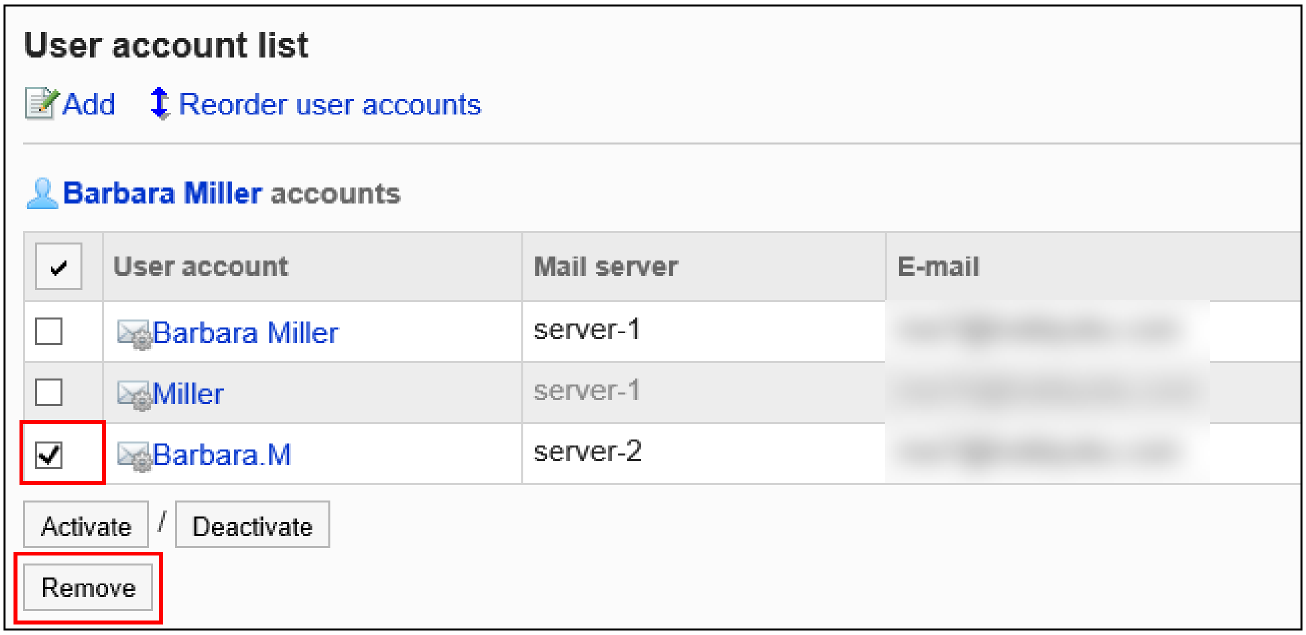
4. **Click "E-mail".**

5. **Click "User Accounts".**

6. **On the "User Accounts" screen, select a user.**

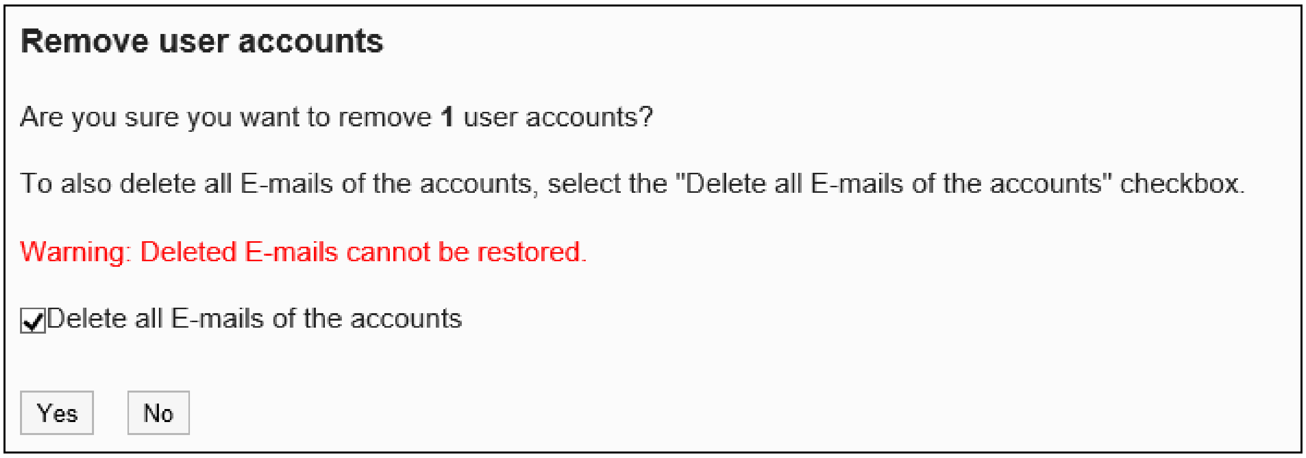


7. **On the user account list screen, select the check box of the user account to delete, and then click "Delete".**



8. **Click "Yes" on the deleting user accounts in bulk screen.**

To delete e-mail data, select the "Delete all E-mails of this account" check box.



Deleting All User Accounts

Delete all user accounts.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

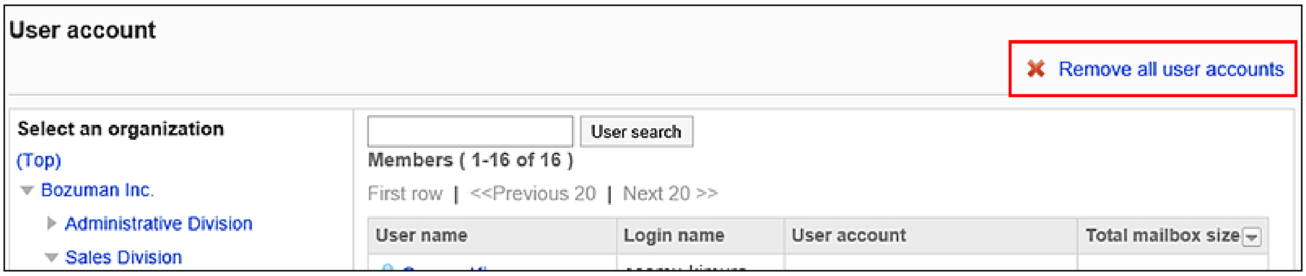
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

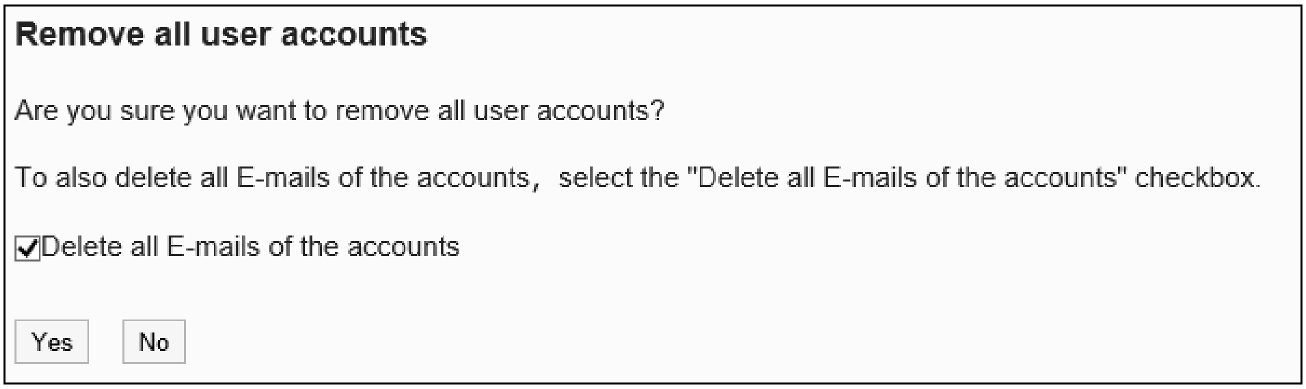
5. **Click "User Accounts".**

6. **On the "User Accounts" screen, click to delete all user accounts.**



7. **Click "Yes" on the deleting all user accounts screen.**

To delete e-mail data, select the "Delete all E-mails of this account" check box.



2.12.4. Setting up E-Mail Quotas

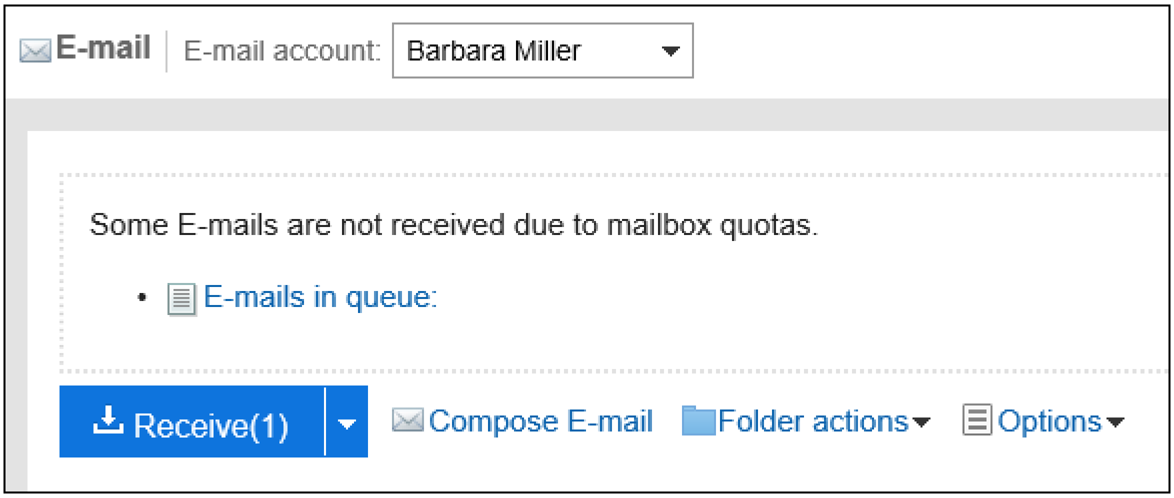
Set limitations for e-mails.
Sending and receiving large size of e-mails can cause a heavy load on the e-mail servers and lower the system performance. You can set size limitations for incoming and outgoing e-mails to prevent lowering performance caused by sending and receiving them.

Caution

- If you use a POP3 server as your incoming e-mail server, your POP3 server must support the UIDL command to set "Individual E-mail size restrictions".
- The size restriction of outgoing e-mail is applied to e-mail after encoding.
  E-mail attachments and e-mails that are written in other charsets than ASCII are encoded into ASCII when e-mails are sent. When the actual size after the e-mail is encoded exceeds the limit, an error occurs, even though the size of the e-mail before sending is less than the limit.
  For details, see the article on FAQ about an error (GRN_MAIL_24155) occurs when sending an e-mail of the size under the limitation and it fails .

Solutions if users cannot receive incoming e-mails due to size limitation

If your system administrator configures the incoming e-mail maximum size, you cannot receive e-mails which exceed the limit.
In "E-mail" screen, the user sees a message saying that the e-mail could not be received.



If you are consulted by users on such an incident, tell them to try one of the followings:

- Delete e-mails in queue from the e-mail server.
- Receive the e-mail which could not be received by using the other e-mail programs.

For details, see the topic "When Incoming E-Mail Size Exceeds the Maximum Limit"

Setting E-Mail Quotas for All Users

Set the limitation for e-mail size per user.

This setting applies to all users.

Caution

- When you use "E-mail quotas" screen that applies the same settings to all users to set the setting values, they override the values set in the e-mail size setting screen for each user.
  When you change the values set in "E-mail quotas" screen, you should take the effect of overriding the values set in the e-mail size setting for each user into account beforehand.

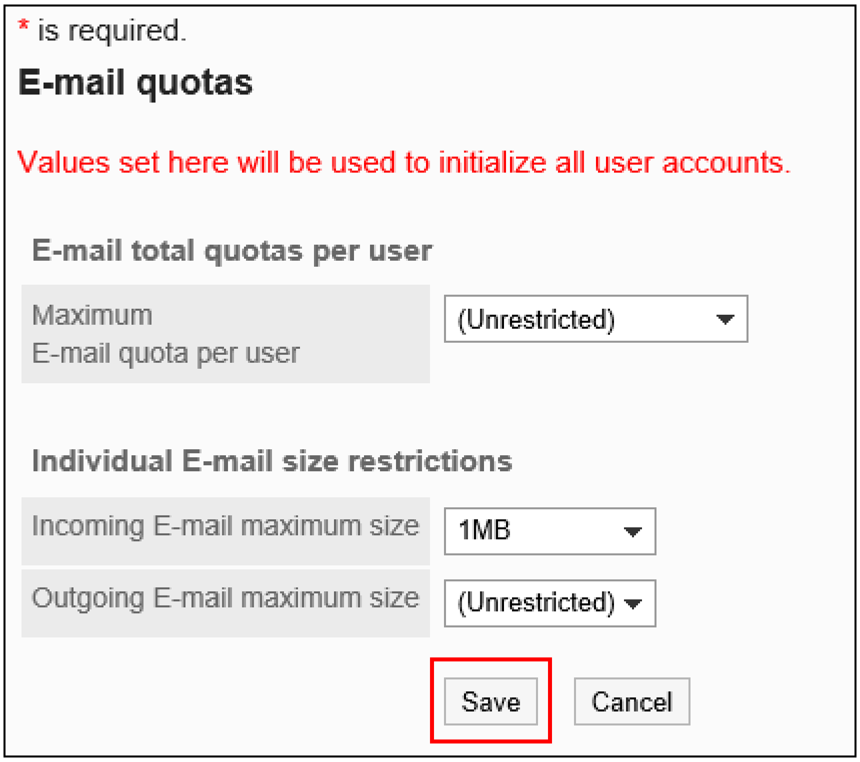
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click "E-mail quotas".**
6. **On "E-mail quotas" screen, set the total size of e-mails per user in its field.**

   Set the total size limitation of e-mails that a user can hold.
   Total size is the total e-mail size stored in folders for all accounts owned by a user.
7. **Set the limitation for e-mail size received in each e-mail size limitation setting.**

   Set the maximum size for incoming e-mails per an e-mail.
   The maximum value that can be set is Unlimited.
8. **Set the outgoing e-mail size limitation setting.**

   Set the maximum value for e-mails sent at a time.
   The maximum value that can be set is Unlimited.
9. **Confirm your settings and click "Save".**



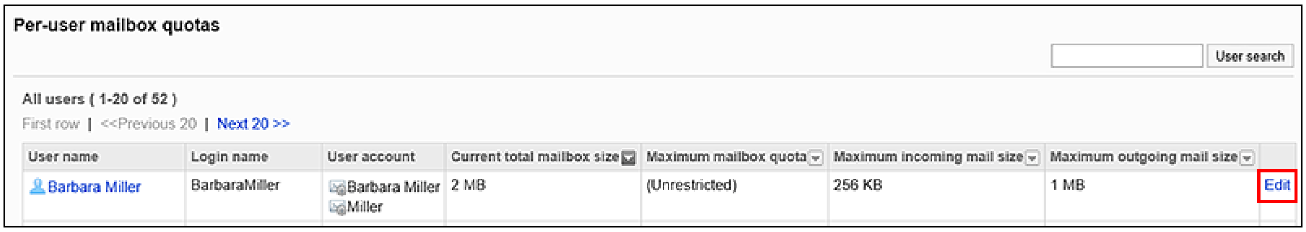
Setting E-Mail Quotas for Each User

Set the limitation for e-mail size per user.

For example, you can set limitations for individual users who are less frequently using e-mails after setting a limitation for all users in bulk.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click the item to set user e-mail size.**
6. **On the screen for e-mail size setting for each users, click "Change" for the user to change its setting.**



For users who have multiple e-mail accounts, the total size shows the value that is a total of all the e-mail accounts.

7. **On "E-mail quotas" screen, set the total size of e-mails per user in its field.**

Set the total size limitation of e-mails that a user can hold.

Total size is the total e-mail size stored in folders for all accounts owned by a user.

8. **Set the limitation for e-mail size received in each e-mail size limitation setting.**

Set the maximum size for incoming e-mails per an e-mail.

The maximum value that can be set is Unlimited.

9. **Set the outgoing e-mail size limitation setting.**

Set the maximum value for e-mails sent at a time.

The maximum value that can be set is Unlimited.

10. **Confirm your settings and click "Save".**

2.12.5. Managing E-mails Using CSV Files

Manage e-mail data using CSV files.

The following data can be managed using CSV files:

- Mail Servers
- User Accounts
- E-mail Quotas

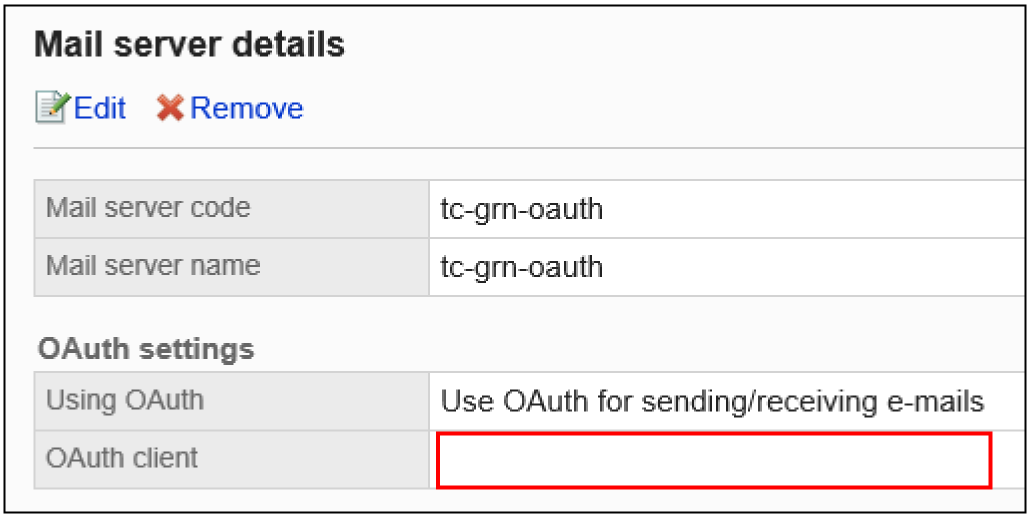
Importing Data from a CSV File

Import e-mail data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Caution

- **When OAuth is used to send/receive e-mails in Garoon version 5.5.1 or later**
  You cannot import "OAuth client" items of e-mail servers from a CSV file. If you import the data of the existing e-mail server from a CSV file, the settings of "OAuth client" items are deleted. In this case, you need to reconfigure "OAuth client" items and users must perform the authorization.



After resetting the "OAuth client" items of e-mail servers in Basic system administration, contact users to perform OAuth authorization in the "E-mail account details" screen in Personal Settings.

Steps:

1. Create a CSV file to import data.

For information on items that can be managed in CSV files, refer to the topic about E-Mail(1882Page) CSV format.

2. Click the administration menu icon (gear icon) in the header.

3. Click "System settings".

4. Select "Application settings" tab.

5. Click "E-mail".

6. Click "Import from CSV file".

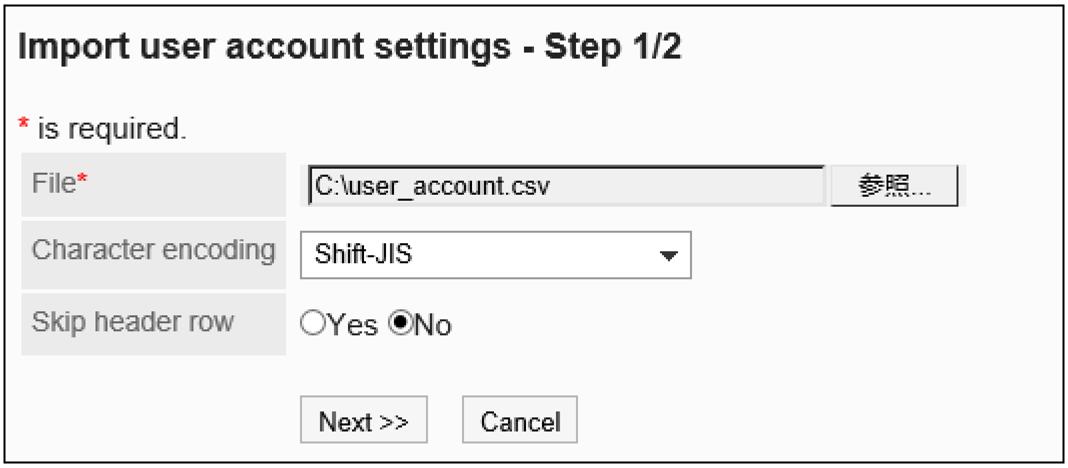
7. On "Import from CSV File" screen, select the data to import.

8. **Select the CSV file that you created in step 1.**

9. **Set the data to import, and click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

Exports the e-mail data to a CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

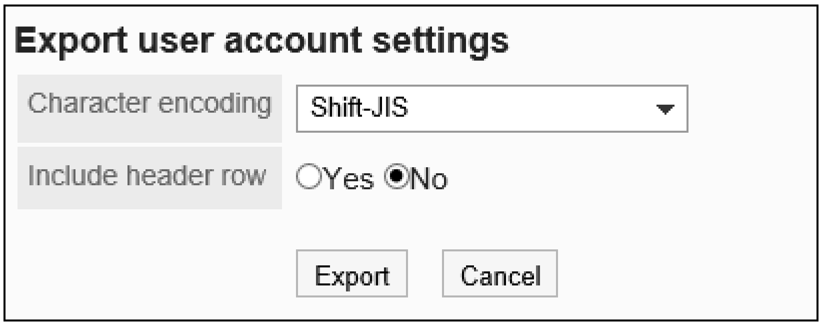
5. **Click "Export to CSV file".**

6. **On the "Export to CSV File" screen, select the data to export.**

7. **Set the required items for the the data to export.**

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  Following character codes can be selected.
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".



8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

2.12.6. Configuring OAuth Clients

To use OAuth for sending and receiving e-mails, you need to configure OAuth client settings for both providers and Garoon.
The setting for the OAuth client can be configured in Garoon version 5.5.1 or later.

Caution

- You cannot use OAuth authentication if you are not using HTTPS for running Garoon.

Steps to Configure OAuth to Send and Receive E-Mails

Steps:

Step 1 Configure OAuth clients.

Step 2 Configure OAuth clients.

Step 3 Add e-mail server.

Step 4 Add user accounts.

Step 5 A user performs OAuth authorization.

Step 1 **For Providers** **Configure OAuth clients.**

Configure necessary settings according to your e-mail settings.

Step 2 **Working in Garoon** **Configure OAuth clients.**

You need a client ID and a client secret provided in Step 1.
For details, refer to how to add OAuth clients(1215Page).

Step 3 **Working in Garoon** **Add e-mail server.**

For details, refer to "Using Gmail/Exchange Online Account(1180Page)" in "Setting up an E-Mail Server".

Step 4 **Working in Garoon** **Add user accounts.**

For details, refer to "User Account Settings(1188Page)".

Step 5 **Working in Garoon** **A user performs OAuth authorization.**

For details, refer to how to perform OAuth authorization.

Adding OAuth Clients

Add your OAuth client.

Steps:

1. **On the provider's screen, configure OAuth client, and copy the provided client ID and the client secret to a text editor such as Notepad.**
   You can find a sample configuration in the OAuth authentication page in the Support Guide.

2. **Click the administration menu icon (gear icon) in the header.**

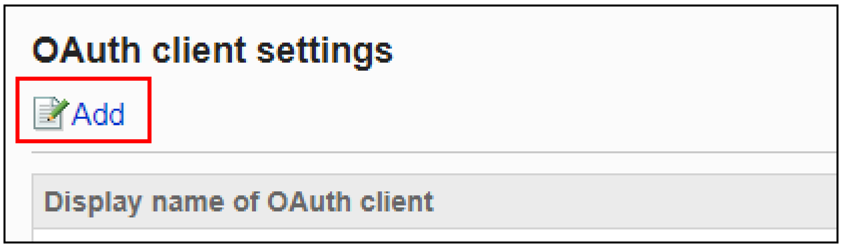
3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "E-mail".**

6. **Click OAuth client settings.**

7. **On the "OAuth client settings" screen, click Add.**



8. On the "Add OAuth client" screen, enter OAuth client information.

You must provide all information about your OAuth client.

- Display name of OAuth client:

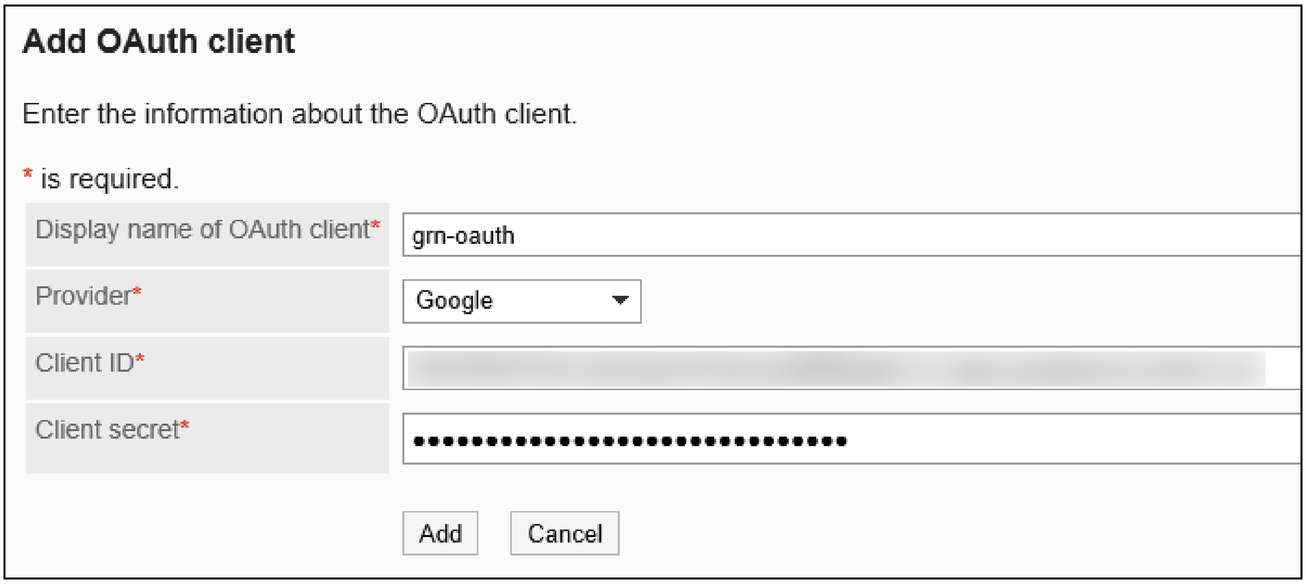
  The display name you specify here will be shown in the drop-down list of OAuth clients on the "Add mail server" and the "Change mail server" screens.
- Provider:

  Select a provider to use.

  You can select from the following providers.
  - Google
  - Microsoft
- Client ID:

  Enter the client ID you copied in Step 1.
- Client secret:

  Enter the client secret you copied in Step 1.



9. Confirm your settings and click "Add".

Changing OAuth Clients

Change your OAuth client.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "E-mail".**

5. **Click OAuth client settings.**

6. **On the "OAuth client settings" screen, select the display name of the OAuth client you want to change.**

7. **On the "OAuth client details" screen, click Change.**

8. **On the "Edit OAuth client" screen, set the fields as needed.**

   For details on the fields to configure, refer to how to add OAuth clients(1215Page).

9. **Confirm your settings and click "Save".**

Deleting OAuth Clients

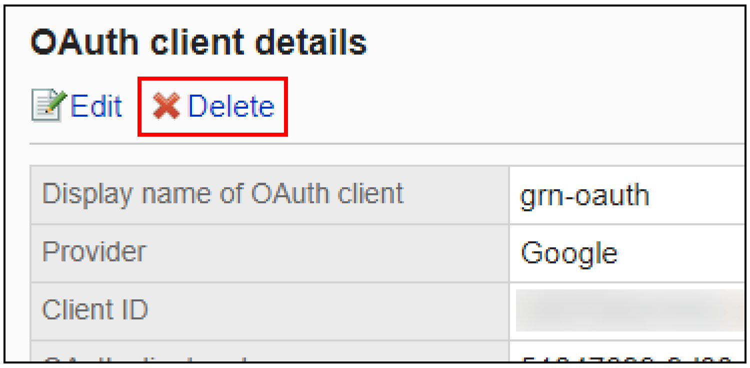
Delete your OAuth client.
You cannot delete the OAuth client configured in the e-mail server setting. Make sure you change or delete the OAuth client in the e-mail server setting before deleting it.

Caution

- You cannot undo the deletion of the OAuth client once you delete it.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "E-mail".**
5. **Click OAuth client settings.**
6. **On the "OAuth client settings" screen, select the display name of the OAuth client you want to delete.**
7. **On the "OAuth client details" screen, click Delete.**



8. **On the "Delete OAuth client" screen, click Yes.**

2.13. Workflow

"Workflow" is an application to request an expense process and approve approval.
You can flexibly design a request form that follows business processes in a Web browser. You can check the status of requests from mobile devices as well.
System administrators and the application administrators can create request forms and set user rights.

References

- Video: How to Set Up Workflows (For Administrators Who Are New to the Workflow Setup)(1219Page)
- Workflow characteristics(1223Page)
- Workflow Settings Flow(1225Page)
- Request Submission
- Workflow Guides for Different Purposes

2.13.1. Video: How to Set Up Workflows

This section provides videos to describe the detailed information required for setting up the workflows in Garoon for the administrators who are new to the workflow feature.

Target audience of the videos	System administrators who are currently using other applications such as Scheduler, and considering newly adopt the workflows
Prerequisite	Job titles for the approvers have already been configured (such as "division managers" and "department managers")
Video contents	Six videos are included. For those who want to start from the overview, watch "Introduction" and "For Beginners". In "For Intermediate Users", advanced settings are described such as the configuration of access permissions.

Note

- The videos were created using the cloud version of Garoon, so some user interface texts might look different if you are using the package version of Garoon.
  For example, "Garoon settings" in the video corresponds to "System settings" in the package version of Garoon.

1. Introduction

You can learn what you can achieve with workflows in Garoon and the use cases set in this video.

Videos are provided on the Web pages.

(Duration: 7 min 11 sec)

2. For Beginners (1): Creating Request Forms

You can create a workflow of a request form referencing a paper form format of a simple approval request.

Videos are provided on the Web pages.

(Duration: 6 min 31 sec)

3. For Beginners (2): Creating Approval Routes

You can set up approval routes for the division manager and the department manager to the request form you created. Furthermore, you can configure the request form to take another approval route when the requested amount exceeds a certain threshold.

Videos are provided on the Web pages.

(Duration: 8 min 39 sec)

4. For Intermediate Users (1): Categories, Access Permissions, Settings to Make Request Data Public, and Setting Up Superiors

You can learn the advanced settings such as categorizing request forms as well as configuring access permissions.

Videos are provided on the Web pages.

(Duration: 12 min 11 sec)

5. For Intermediate Users (2): General Settings

You can configure the common settings in "General setting" screen. Possible configurations include "allowing applicants to reroute the approval routes" and "allowing the approvers to send back requests". You can check the procedures when you need to change the default settings.

Videos are provided on the Web pages.

(Duration: 7 min 57 sec)

6. For Requests and Approvals

You can try the request and approval procedure on the Garoon workflow using the request form created.

Videos are provided on the Web pages.

(Duration: 3 min 58 sec)

2.13.2. The First Thing to Check on Workflows

Before you begin, be aware of the workflow process images and the flow of preparation.

The actual work can be done smoothly.

References

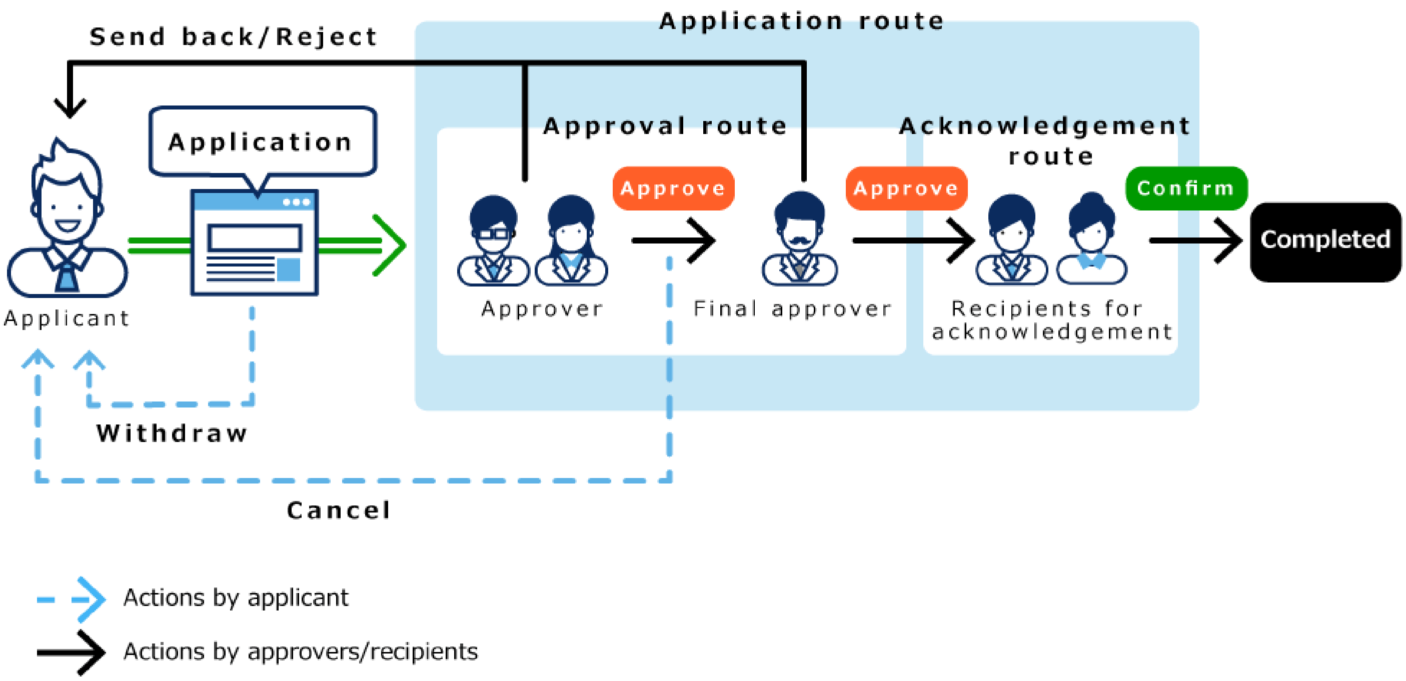
- Workflow characteristics(1223Page)
- Workflow Settings Flow(1225Page)
- General Workflow Settings(1227Page)
- Process for creating a request form(1316Page)

2.13.2.1. Workflow Characteristics

This section describes images from request to process and terminology used in workflow.

Image of Processing Requests

The user requests will be processed in the following flow



Workflow Terminology

The following terms are used for workflow

Application

Term	Description
Request form	This form is for entering the request details.
Request data	The data of a request submitted by a user. Create one request data with one request.

Route

Term	Description
Application route	A general term for Shunji to approve or circulate the request data. May be called a route. It consists of an approval route and a routing route.
Approval route	This is the route for approving the request data. Multiple route steps can be set.
Acknowledgement route	Route to circulate request data. Multiple route steps can be set.
Route Step	This is a process for approving and circulating. To increase the number of approvers and circulars, add a route step.
Route type	Represents conditions for advancing to the next route step. The route type can be "Approval (all approvers)", "Approval (any one approver)", and "Circular". • "Approval (all approvers)" and "Circular": When a processor of the same route step approves or confirms all, the request proceeds to the next route step. • "Approval (any one approver)": If one of the processors of the same route step approves, the request proceeds to the next route step. Other processors that you have not approved will be checked only.

Users

Term	Description
Applicant	The user who submits the request data.
By	The user who processes the request data. This is the name of the approver, the sender, the last approver, and the last
Approver	The user who approves the request data.
Recipients for acknowledgement	This is a user who routes the request data.
Final approver	The user who has been set for the last route step in the approval route.
Last Circulars	The user who has been set as the last route step in the routing route.
A proxy	This is the generic name of the proxy applicant and the proxy approver.

Term	Description
A proxy applicant	The user who submits the request data instead of the delegate.
Proxy Approver	A user who processes the request data instead of the delegate.
A delegate	A native applicant or approver who has delegated a request or approval to a proxy.

Process

Term	Description
Status	The processing status of the request data. Depends on the operations of the applicant and the processor.
Withdraw	This means that the applicant must temporarily withdraw the request. You can only reclaim requests if no one has processed the processor.
Cancel	The applicant is to withdraw the request. When you cancel the request, the process ends. You can cancel a request only if the last approver has not approved it.

2.13.2.2. Workflow Settings Flow

The settings required for users to use workflow are performed in the following order

Steps:

Step 1 Perform general Workflow settings.

Step 2 Set the category.

Step 3 Set access permissions for each category.

Step 4 Set up a shared route.

Step 5 Set up a request form.

Step 6 Make the request form available to users.

Step 1 **Perform general Workflow settings.**

Configures basic workflow functions.

For details, refer to General Settings for workflow(1227Page).

Step 2 **Set the category.**

Sets the category for which you want to categorize the request form for workflow.

For details, refer to Setting Categories(1239Page).

Step 3 **Set access permissions for each category.**

You can limit which users can use the request form for each category.

For details, refer to Setting Access Permissions for Categories(1249Page).

Step 4 **Set up a shared route.**

Set up shared routes to be used in workflow, based on the current approvals and other procedures.

For details, refer to Setting up shared routes(1267Page).

If each form has a different route, you can set a dedicated route when you create a request form.

Step 5 **Set up a request form.**

You can set up a request form for users to request.

For details, refer to the following page:

Setting up Request Forms(1316Page)

Setting up an item in a request form(1357Page)

Setting up Route Information(1400Page)

Step 6 **Make the request form available to users.**

For details, refer to Enabling Request Forms(1355Page).

Note

- If necessary, set the following settings
- Setting Operational Administrative Privileges for Categories(1262Page)
- Setting up Proxies(1236Page)
- Setting up Route Branching(1446Page)

2.13.2.3. General Workflow Settings

In general Workflow settings, you can set basic workflow functions such as the date and time when you want to switch between request numbers and approval numbers, and whether to allow the route change after a request has been made.

Setting up Annual Changeover of Request/Approval Numbers

Initializes the request number and the approval number that are applied to the request data every year, and sets the date and time when the fiscal year is switched.
This setting is applied when a request number and approval number are used for each request form.
For details, refer to Request & Approval numbering(1335Page).

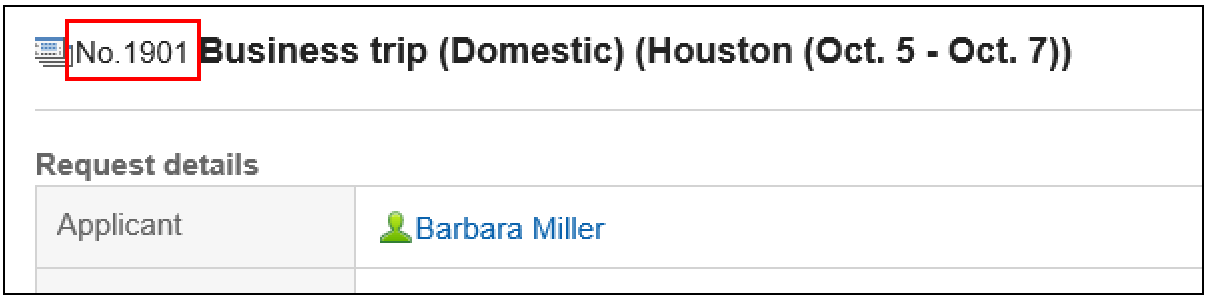


Image of Annual Changeover

An example of how to set the date and time of the annual changeover and the request number format is as follows

Example 1:

- Annual changeover date and time: September 1, 9:00 am
- Request number format:% YYYY%-% 00SN%

Request Date	Request Number	Description
August 30, 2019	2018-228	Because the date is earlier than the annual changeover,% YYYY% is displayed as "2018".
September 5, 2019	2019-01	

Example 2:

- Annual changeover date and time: January 10th 9:00 am
- Request number format:% YYYY%-% 00SN%

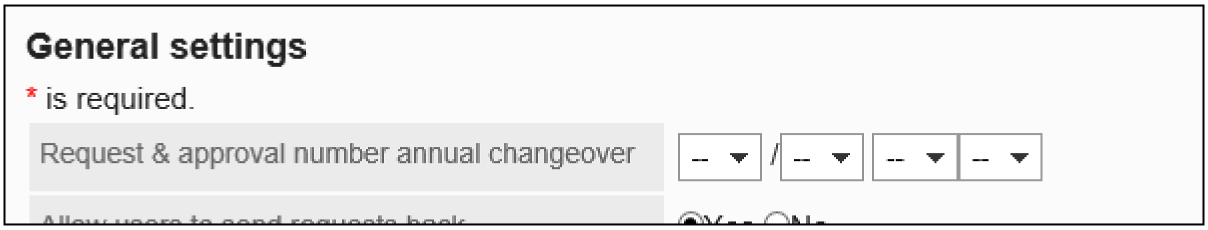
Request Date	Request Number	Description
December 20, 2018	2018-228	Because the date is earlier than the annual changeover,% YYYY% is displayed as "2018".
January 12, 2019	2019-01	

Note

- If you are using the request number and the approval number for each request form, you can also manually initialize the request number or the approval number. For details, refer to the following page:
  Initializing Request Numbers(1341Page)
  Initializing Approval Numbers(1343Page)

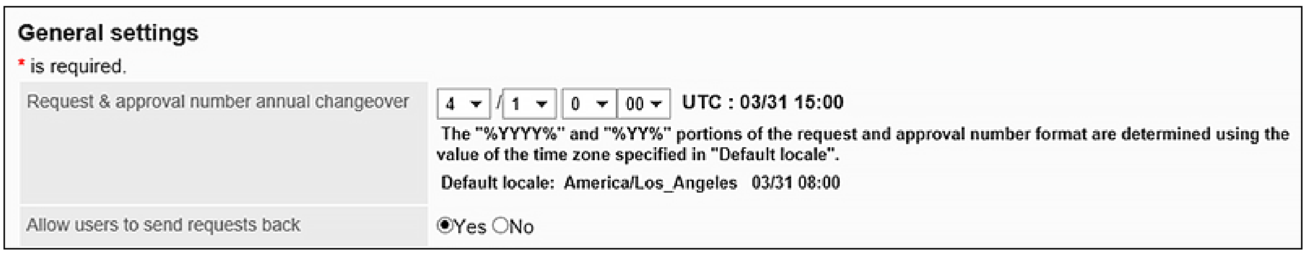
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "General Settings".**
6. **On the "General Settings" screen, select the date and time that you want to change in the "Annual Change request/Approval number" field.**
   The time zone of the logged-in user is applied to the day of the choice.



If you want to change the date and time that has been set, the following date and time are displayed on the screen

- Date and time when the specified date and time has been converted to the UTC standard Time:
  Appears to the right of the drop-down list.
- Date and time converted by the time zone which is set in the "Default locale value" field in the general settings in localization(561Page):
  Appears below the drop-down list.



To disable the setting, select "--month", "--day", "--hour" and "--minute".

7. Confirm your settings and click "Apply".

Allowing Sent Back

Determines whether or not the approver can progress a request.
If you do not allow progress, the approver processes the request data in one of the approvals or rejects. For details, refer to processing requests.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Workflow".

5. Click "General Settings".

6. On the "General settings" screen, on the "Allow to use Progress" field, select "Allow".

7. Confirm your settings and click "Apply".

Allowing Applicants to Change Routes

Select whether to allow the applicant to change the route.
If you do not allow a route change, the applicant cannot change the processor for the route step of the submitted request data.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Workflow".

5. **Click "General Settings".**
6. **On the "General settings" screen, in the "Allow users to route a Request" field, select "Allow".**
7. **Confirm your settings and click "Apply".**

Allowing Operational Administrators to Change Routes

Determines whether operational administrators can change the route.
If a route change is not allowed, the operational administrator cannot change the processor for the route step of the request data in progress.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "General Settings".**
6. **On the "General settings" screen, on the "Allow operational administrators to change route" field, select "Allow".**
7. **Confirm your settings and click "Apply".**

Allow System Administrator to Reroute

Select whether to allow system administrators to change the route.
If a route change is not allowed, the system administrator cannot change the processor for the route step of the request data in progress.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "General Settings".**

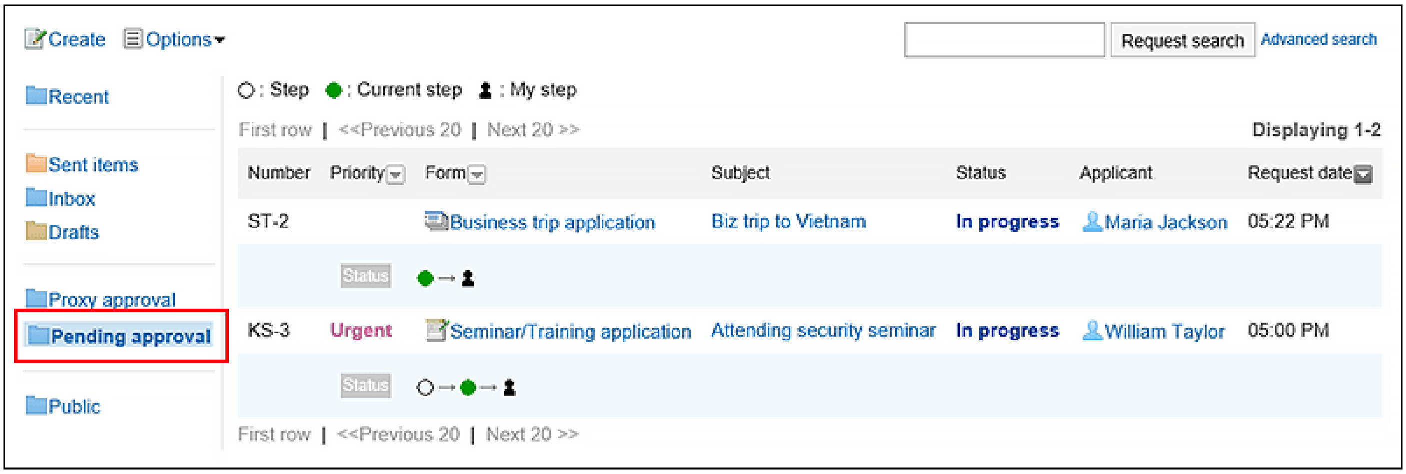
6. **On the "General settings" screen, on the "Allow system administrator to change route" field, select "Allow".**

7. **Confirm your settings and click "Apply".**

Allowing to Use Approval Appointments

Select whether to allow the appointment list.

If you allow users to use the Approval appointment list, you can check the progress of the request data that you have set as a processor on the "Workflow (Appointment list)" screen.



Note

- If the user is set only as a processor for the routing route, the progress of the request data is not displayed.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "General Settings".**

6. **On the "General Settings" screen, select "Allow" in the "Allow users to approve appointments" field.**

7. **Confirm your settings and click "Apply".**

Allowing Proxy Requests

Select whether to allow proxy requests.

For details on proxy requests, refer to the following page

Setting up Proxies(1236Page)
Proxy Submission of Requests

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "General Settings".**

6. **On the "General Settings" screen, select "Allow" in the "Allow Proxy requests" field.**

7. **Confirm your settings and click "Apply".**

Allowing Proxy Approval

Select whether to allow authorization by proxy.

For details on proxy approval, refer to the following page

Setting up Proxies(1236Page)
Proxy Processing of Requests

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "General Settings".**
6. **On the "General settings" screen, on the "Allow Proxy approval" field, select "Allow".**
7. **Confirm your settings and click "Apply".**

Allowing Users to Set Proxy

Select whether to allow users to set proxy or proxy approvers.

For details, refer to Setting up Proxies.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "General Settings".**
6. **In the "Allow users to delegate Settings" field on the "General Settings" screen, select "Allow".**
7. **Confirm your settings and click "Apply".**

Allowing Users to Use E-mail Notifications

Select whether to allow users to receive e-mails through the "workflow" screen.

Note

- To use e-mail notifications, you must set up a system mail account(550Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "General Settings".**
6. **On the "General settings" screen, on the "Allow E-mail notifications" field, select "Allow".**

   If you select "Allow", enter a URL to display the workflow described in the notification e-mail.

7. **Confirm your settings and click "Apply".**

   When the system administrations are ready, contact users to enable e-mail notification settings in their personal settings.

Setting Character Encoding for Automatic Export

Select the character encoding that you want to encode when the finally approved request data is automatically exported to a CSV file.
For details, see Exporting Request Data to a CSV File Automatically(1485Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**

5. Click "General Settings".

6. On the "General Settings" screen, select a character encoding in the "character encoding for automatic export" field.

Encodes data from a CSV file with the selected character code.

The following character encoding can be selected:

- Unicode (UTF-8)
- Japanese (Shift-JIS)
- ASCII
- Latin1 (ISO-8859-1)
- Simplified Chinese (GB2312)
- Thai (TIS-620)

7. Confirm your settings and click "Apply".

Allowing Customizations Using JavaScript and CSS

You can set whether to allow customizations using JavaScript files and CSS files.

For details, refer to JavaScript and CSS customization(579Page).

2.13.2.4. Setting up Proxies

Set a delegate for the user. If you set up proxies, other users will be able to process requests in absence of request applicants or processors.

- **Proxy Applicant:**
  A user who submits a request data instead of a native applicant.
  For details, refer to Proxy Submission of Requests.
- **Proxy Approver:**
  A user who processes the request data instead of the original approver.
  For details, refer to Proxy Processing of Requests.

For each user, you can set up a proxy applicant and a proxy approver.

The same user can be both the proxy applicant and the proxy approver.

The following actions can be performed by the delegated applicant for requests submitted by proxy

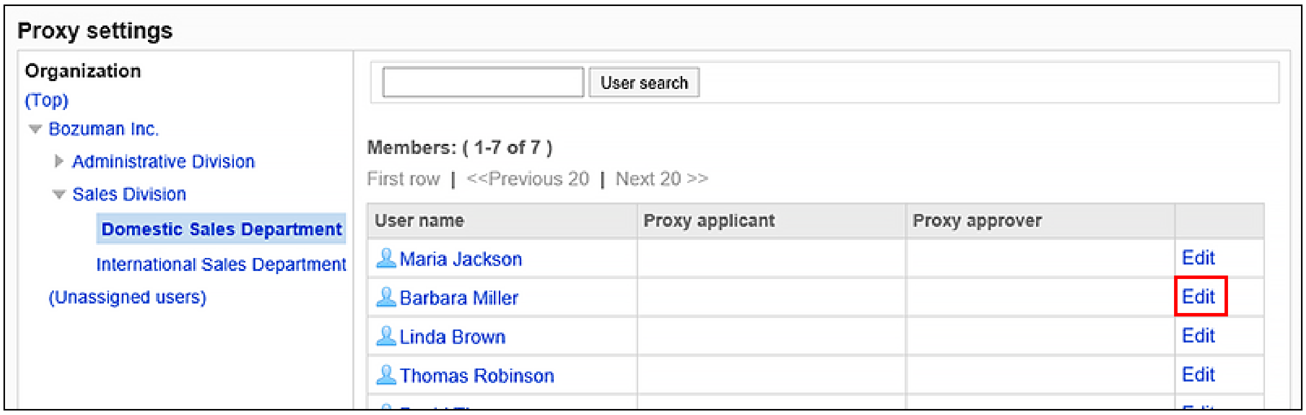
- View
- Withdraw
- Cancel
- Reuse

Note

- For proxy requests and proxy approvals, you must authorize proxy requests and proxy approvals in general settings. For details, refer to the following page:
  Allow Proxy requests(1233Page)
  Allow proxy approval(1233Page)
- Proxy users will not be notified that the proxy has been set.

Steps:

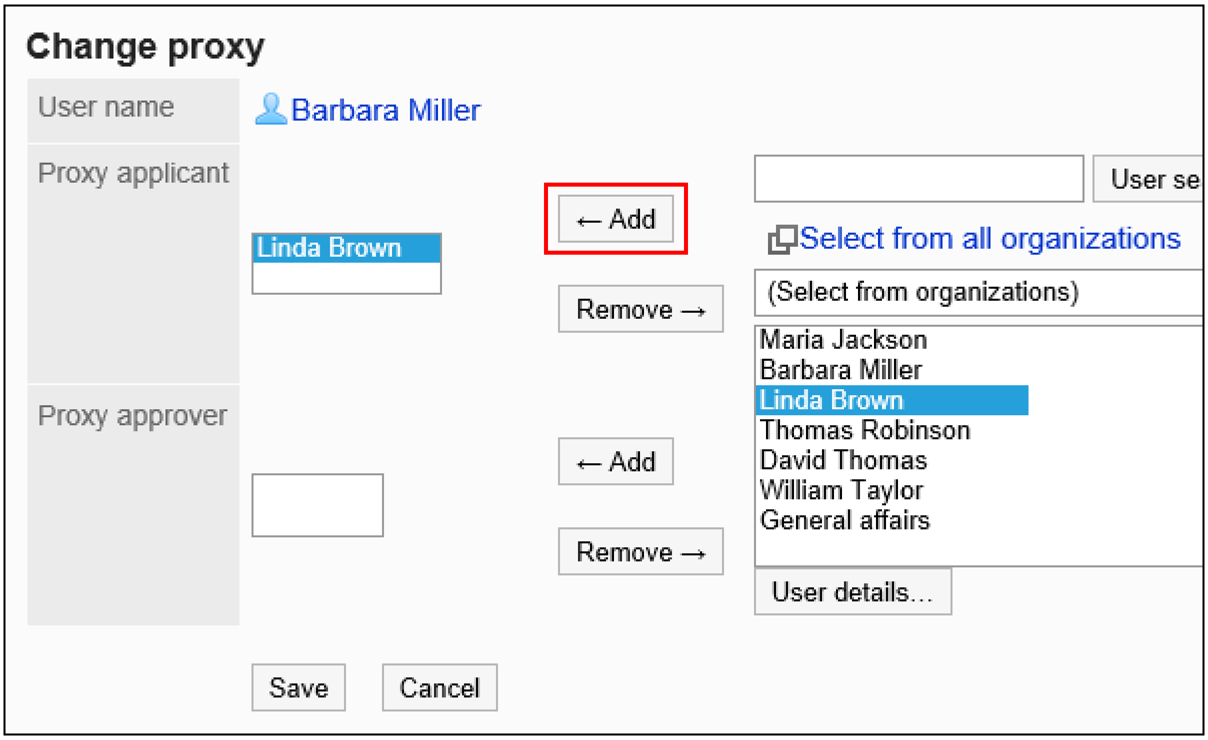
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to set proxies.**
6. **On the screen to set proxies, select the organization, and click "Edit" for a user to add proxies.**



7. **On the "Change Delegate" screen, select a proxy or proxy approver, and then click "Add".**

You can also set up only either of a proxy applicant or a proxy approver.

To delete any proxies, select the proxy applicant or the proxy approver, and then click "Delete".



8. Confirm your settings and click "Save".

2.13.3. Managing Categories

This section describes how to set up categories to categorize request forms.

User rights and operational administrators can be set for each category.

References

- Adding Categories(1239Page)
- Setting Access Permissions for Categories(1249Page)
- Settings to Make Request Data Public(1255Page)

• Setting Operational Administrative Privileges for Categories(1262Page)

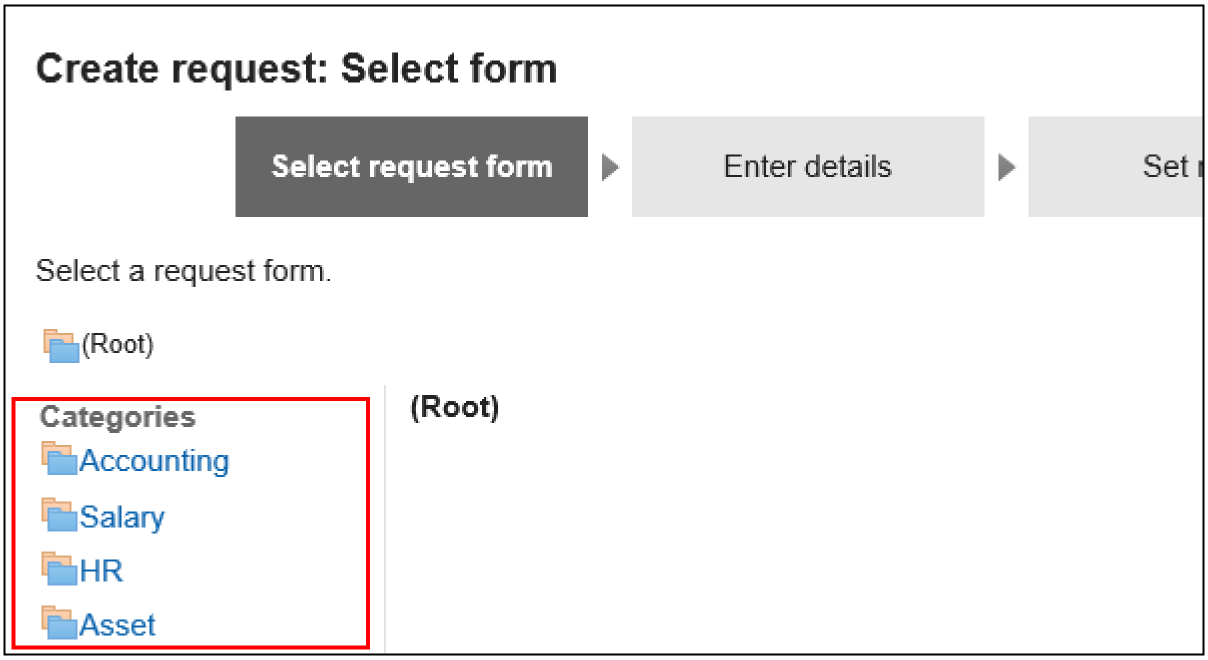
2.13.3.1. Setting Categories

Set categories to categorize request forms.

The following categories are preset in advance: They cannot be changed, moved, and deleted.

- (Root):
  "(Root)" is the top-level category that categories created by system administrators are under it.
- (Uncategorized):
  The category contains request forms not categorized in any categories system administrators created.

Categories are displayed on the screen to create requests (select request forms) of users.



Adding Categories

Add categories. Categories can be layered.

You cannot add subcategories under "(Uncategorized)".

Note

- When you add subcategories, the permissions of the parent category are not applied to them. Permissions must be set for each category.
  For details, refer to Setting Access Permissions for Categories(1249Page).

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

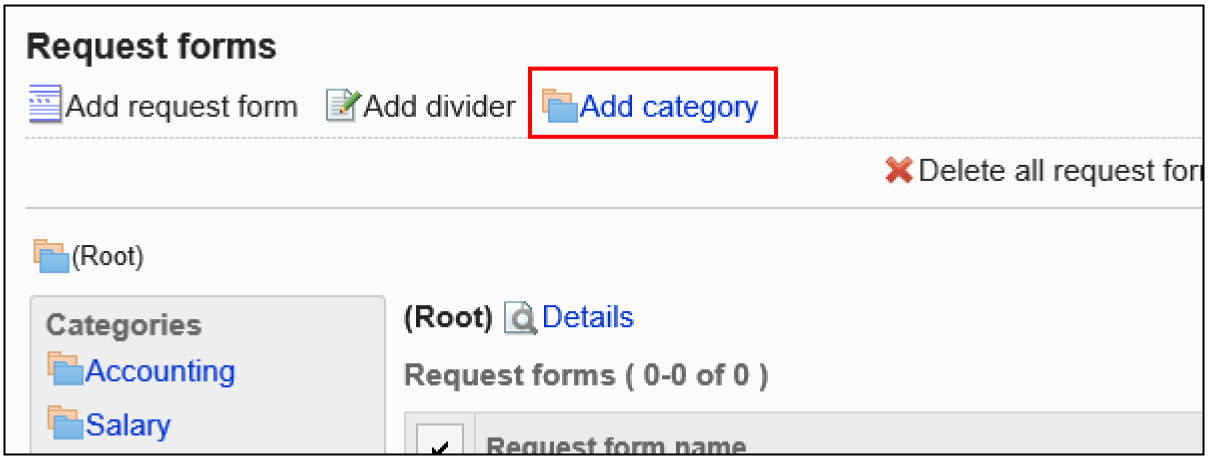
3. Select "Application settings" tab.

4. Click "Workflow".

5. Click "Request Form" list.

6. On the "Request Form" screen, click to add a category.

To add subcategories, select the parent category, and then click to add categories.



7. On the "Add Categories" screen, enter the category name in "Subject" field.

You should set category names.

Clicking "Add localized name" allows you to set category names in multiple languages.

If you do not set the category name in the user preference language, the default category name is displayed.

The following languages can be set:

- 日本語
- English
- Simplified Chinese

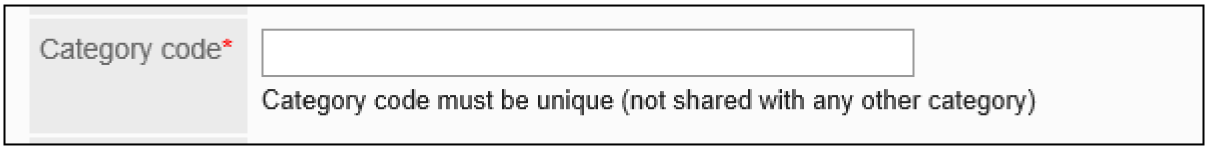
- Traditional Chinese

  Exported in Traditional Chinese.

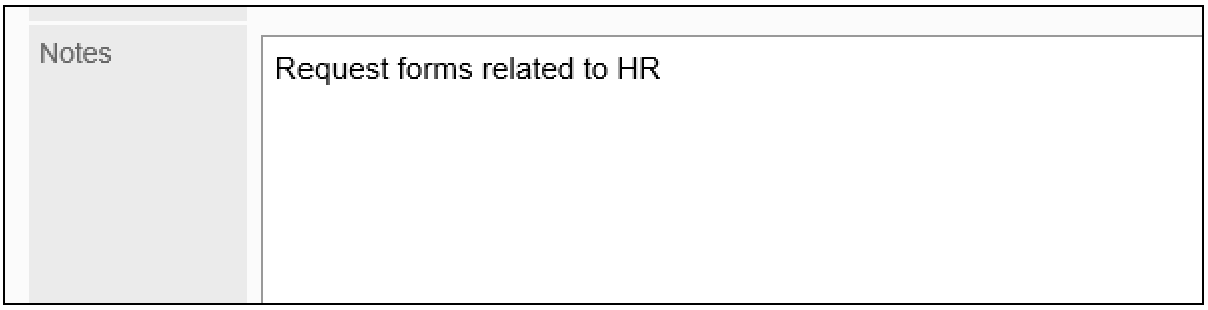
8. **Enter the category code field.**

You should set the category code.

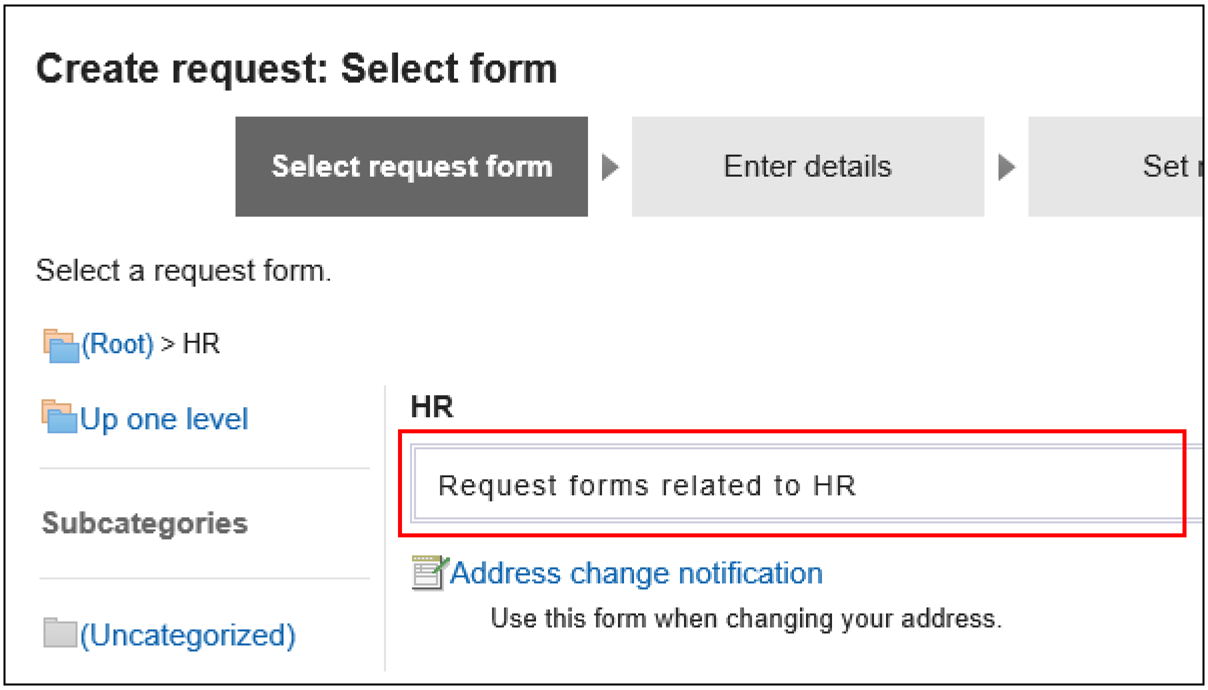
This is a unique code for identifying categories.



9. **Optionally, enter a description of the category in the Notes field.**



Contents entered in this field are displayed on the screen to create requests (select request forms) of users.



10. **Confirm your settings and click "Add".**

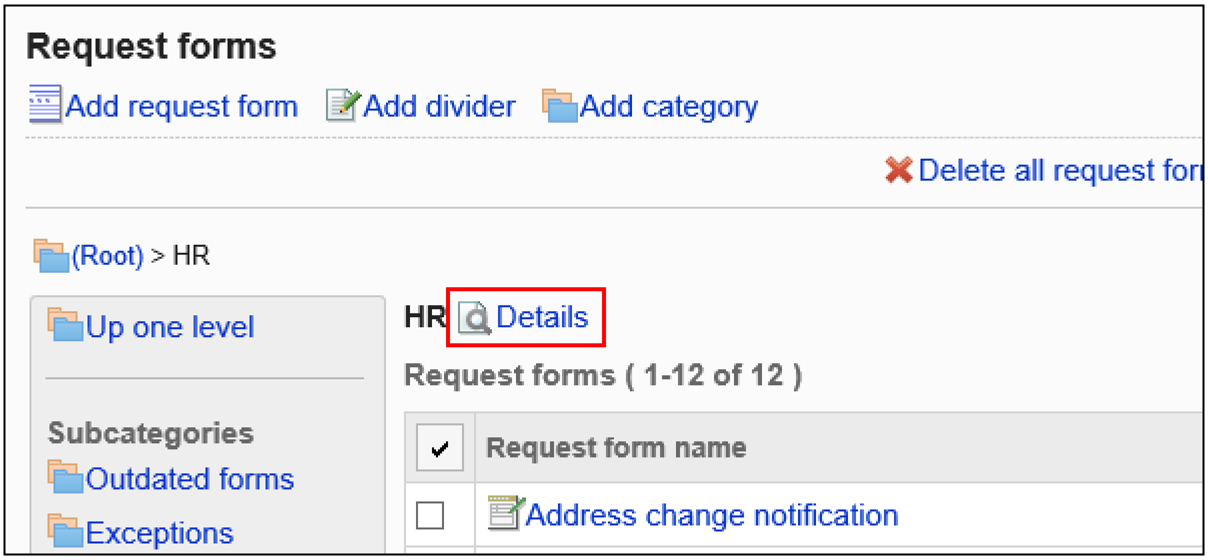
Changing Categories

Change the settings of a category.

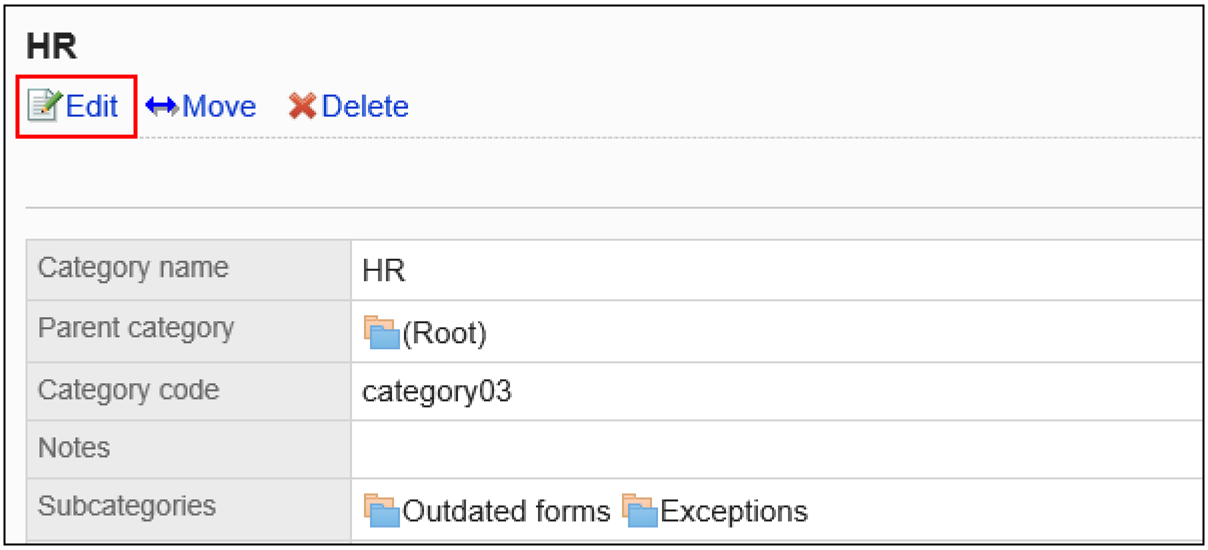
You cannot change "(root)" and "(Uncategorized)".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click "Details".**



7. **On the screen for category details, click "Save".**



8. **On the screen to change categories, set the necessary items.**

9. **Confirm your settings and click "Save".**

Moving Categories

Move categories.

When you move categories, request forms and its subcategories in the category are also moved.

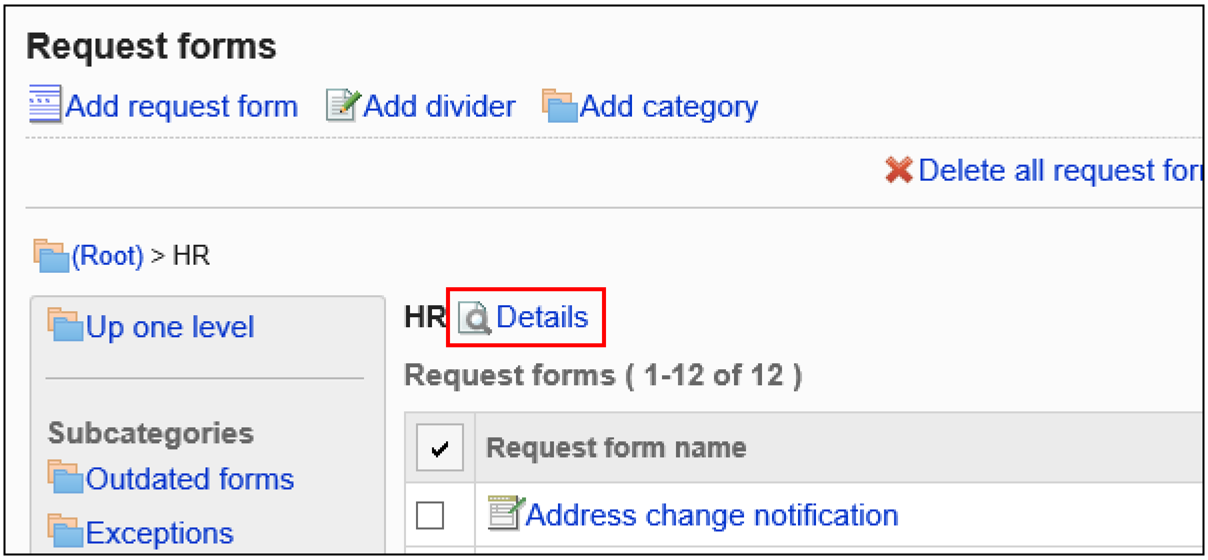
"(Root)" and "(Uncategorized)" cannot be moved.

Note

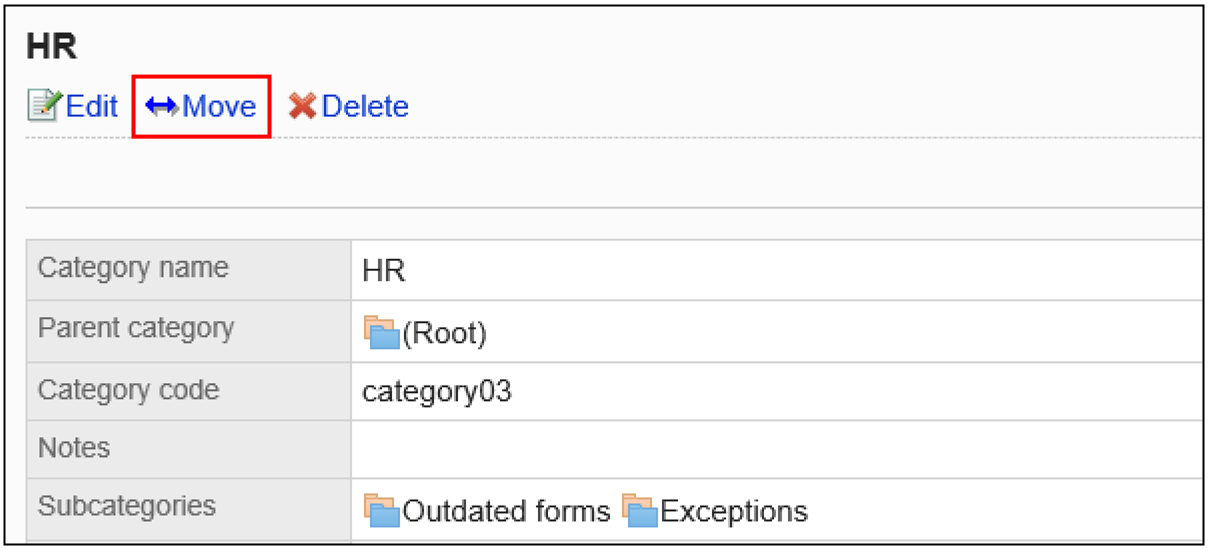
- If the destination parent category has user rights set for it, the request forms in the category may not be available to users depending on their user rights. Check the user rights of the destination parent category before moving categories.
  For details, refer to Setting Access Permissions for Categories(1249Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select the category to move, and click "Details".**



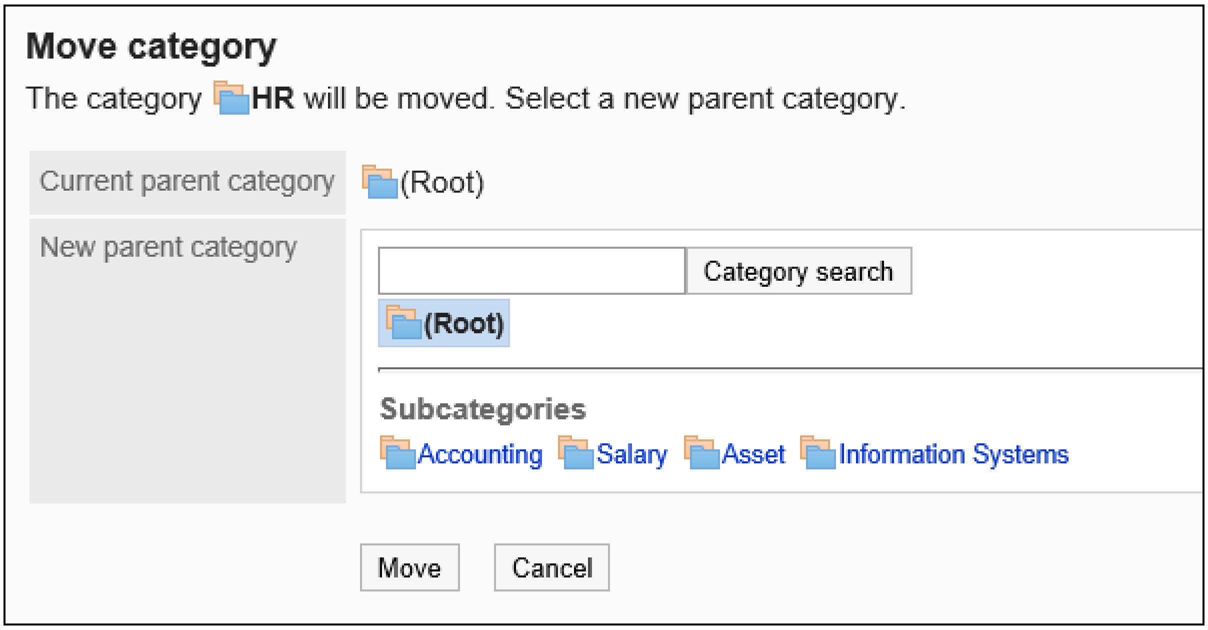
7. **On the screen for category details, click "Move".**



8. **On the screen to move categories, select the parent category to move to.**

You can search for categories to move categories into by entering keywords and clicking "Category search".

Clicking on a category name moves you to the subcategory of the category you clicked.



9. **Confirm your settings and click "Move".**

Reordering Subcategories

Reorder subcategories.

You cannot change the orders for "(Root)" and "(Uncategorized)".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

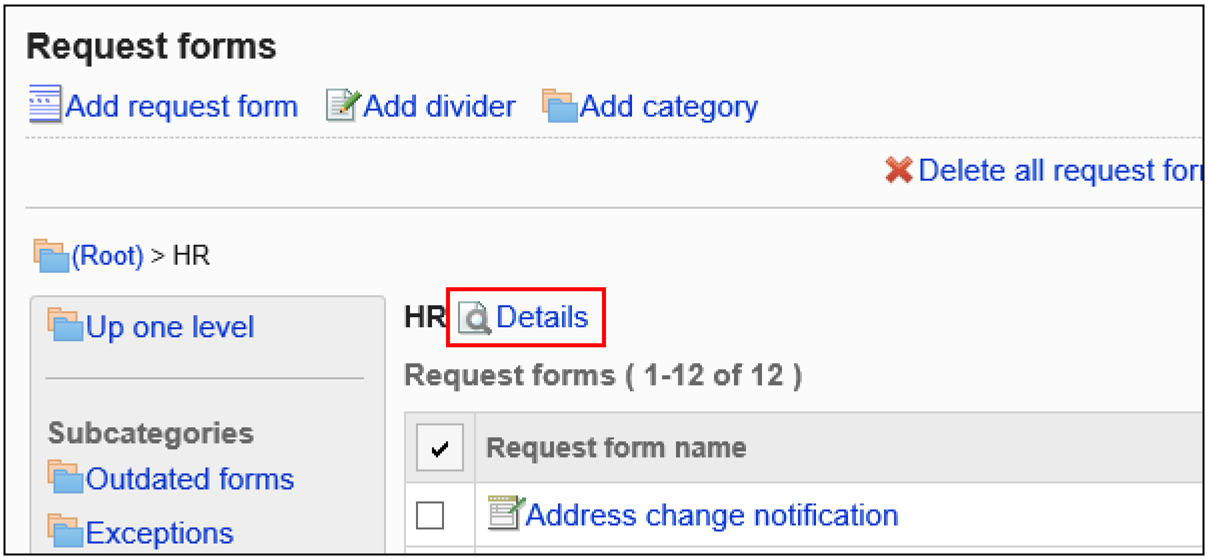
2. **Click "System settings".**

3. **Select "Application settings" tab.**

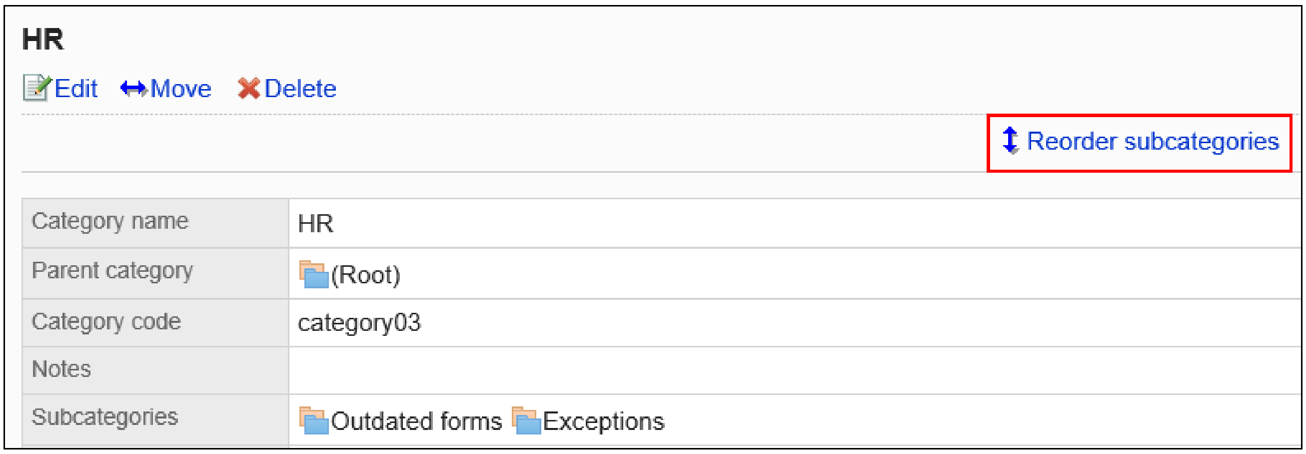
4. **Click "Workflow".**

5. **Click "Request Form" list.**

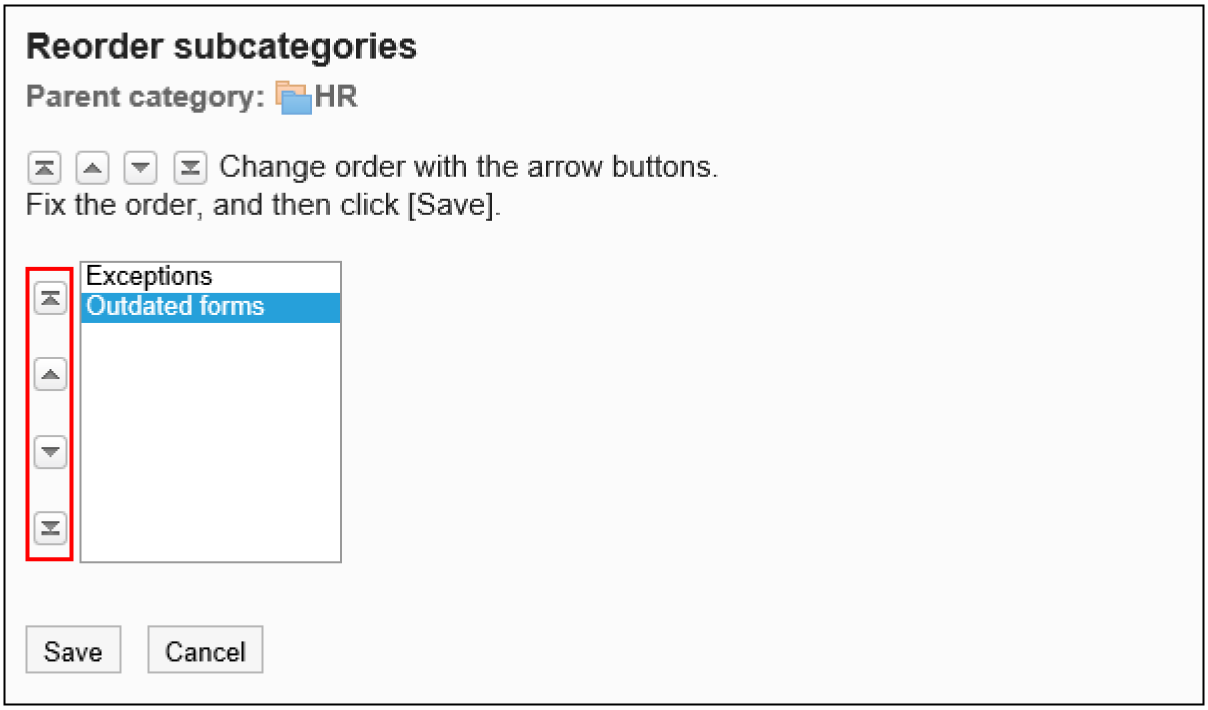
6. **On the "Request Form" list screen, select the category to reorder subcategories, and then click "Details".**



7. **On the screen for category details, click the item to reorder subcategories.**



8. **On the screen to reorder subcategories, reorder the display order.**



9. Confirm your settings and click "Save".

Deleting Categories

Delete categories.

Deleting categories deletes subcategories in them. Request forms in the deleted categories and subcategories are moved to "(Uncategorized)".

You cannot delete "(root)" and "(Uncategorized)".

Caution

- Deleted categories cannot be restored.

Note

- If you have more than 15 levels of subcategories, you cannot delete their parent category.
- Operational administrators cannot delete categories to which they do not have operational administrative privileges.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

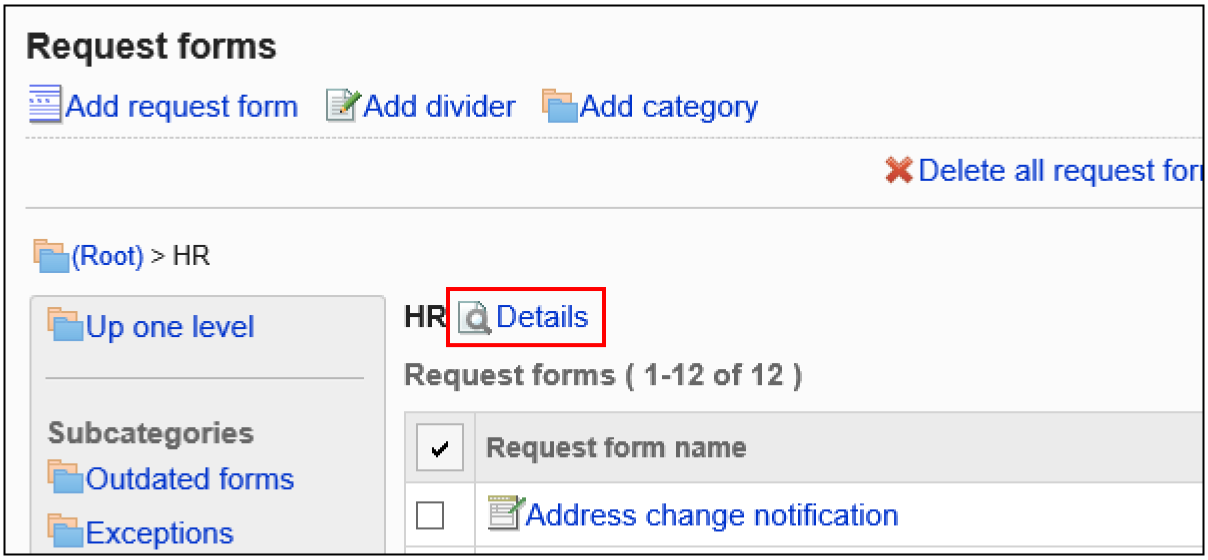
2. **Click "System settings".**

3. **Select "Application settings" tab.**

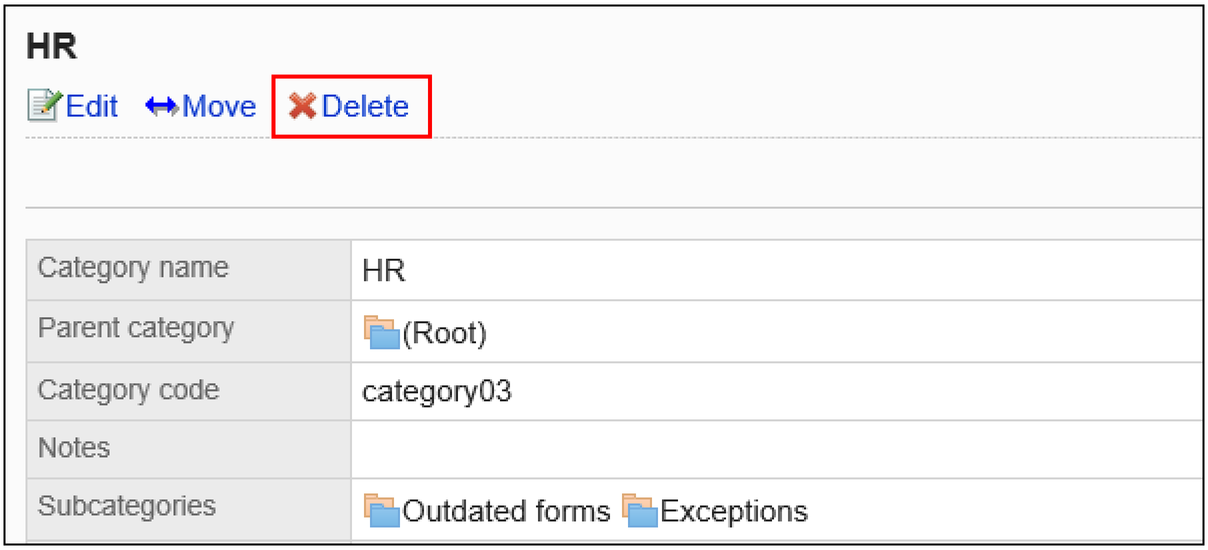
4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click "Details".**



7. **On the screen for category details, click "Delete".**



8. Click "Yes" on the page to delete categories.

2.13.3.2. Setting Access Permissions for Categories

You can set permissions for request forms in categories.
For categories, set the following permissions for departments, users, or roles.

- Access permissions

You cannot set privileges to "(Uncategorized)".

The permissions for workflows vary by the security model applied to the scheduler.
The default setting is set to "REVOKE (All users have access except users on list)". All users are allowed to use request forms in all categories.
For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

Set access permissions for each category.
The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

Caution

- If you change your security model, configured permissions before changing are initialized.

Steps:

1. Click the administration menu icon (gear icon) in the header.

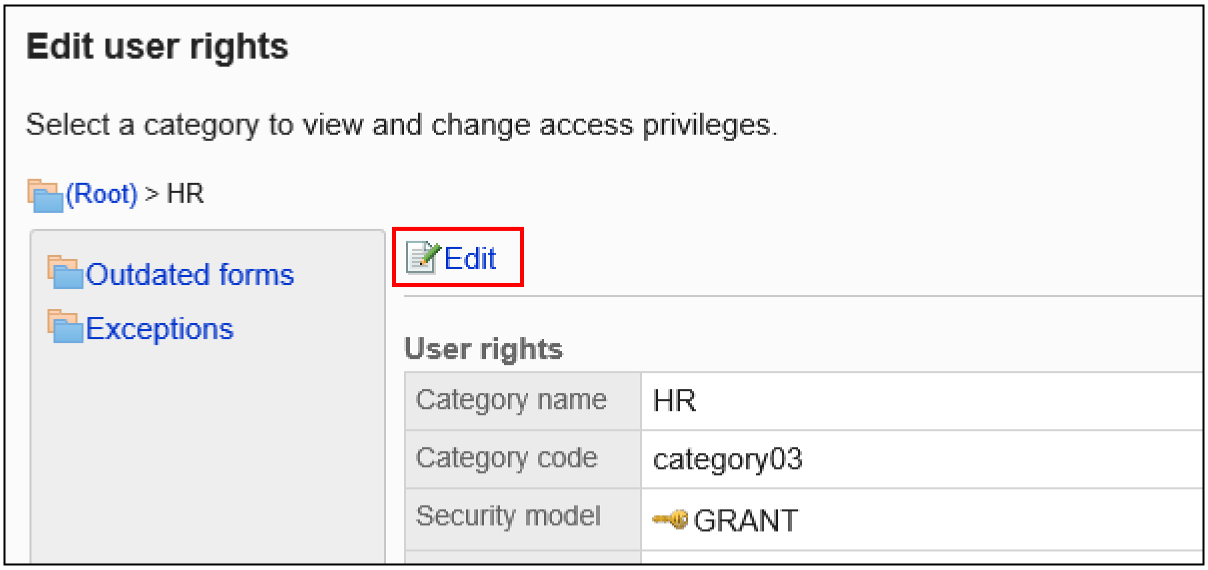
2. Click "System settings".

3. Select "Application settings" tab.

4. **Click "Workflow".**

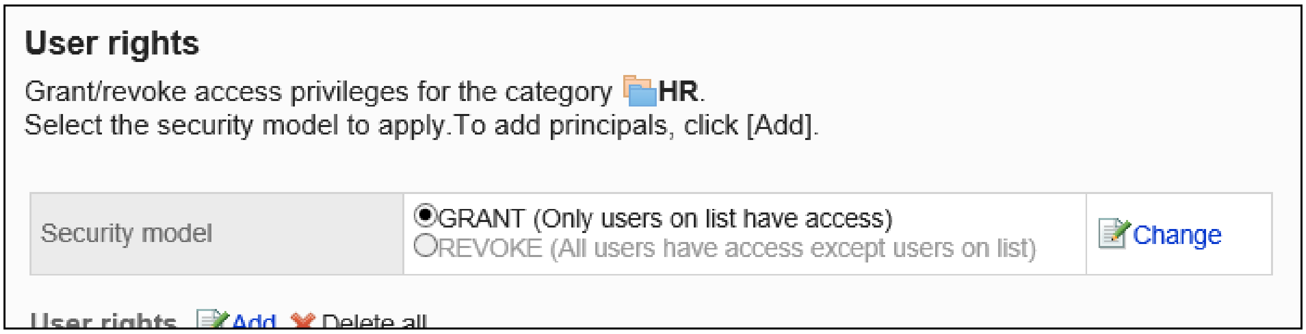
5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a category and click "Edit".**

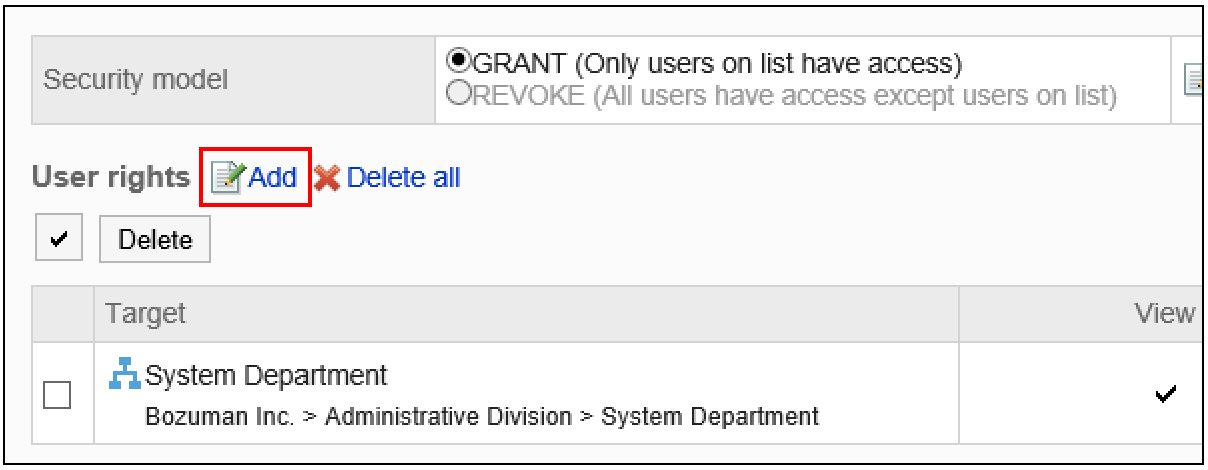


7. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).



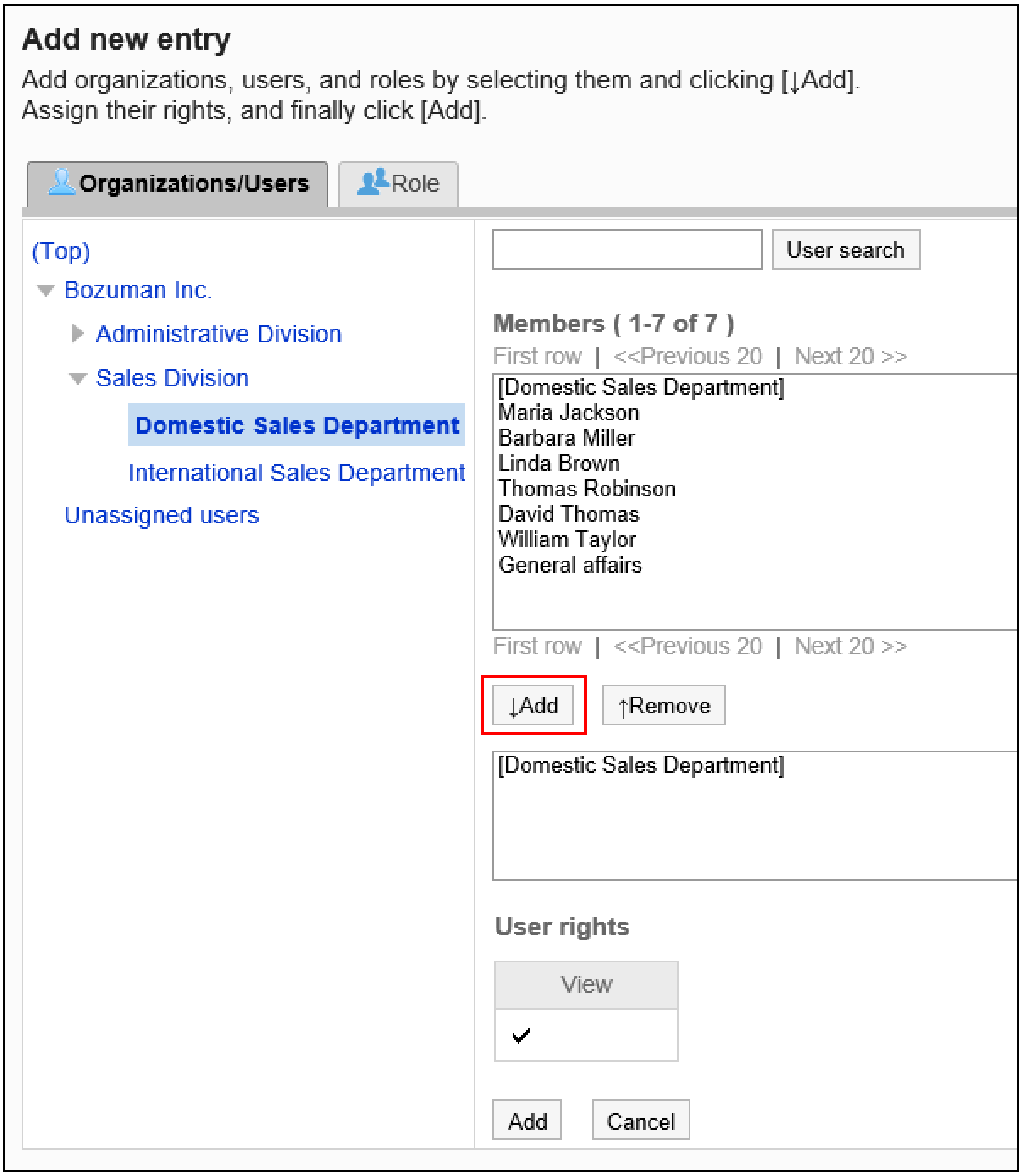
8. **Click "Add" in "User Rights".**



9. On the "Add new entry" screen, select the organization, user, or role, and then click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



10. **Confirm your settings and click "Add".**

Deleting User Rights

Delete access permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.

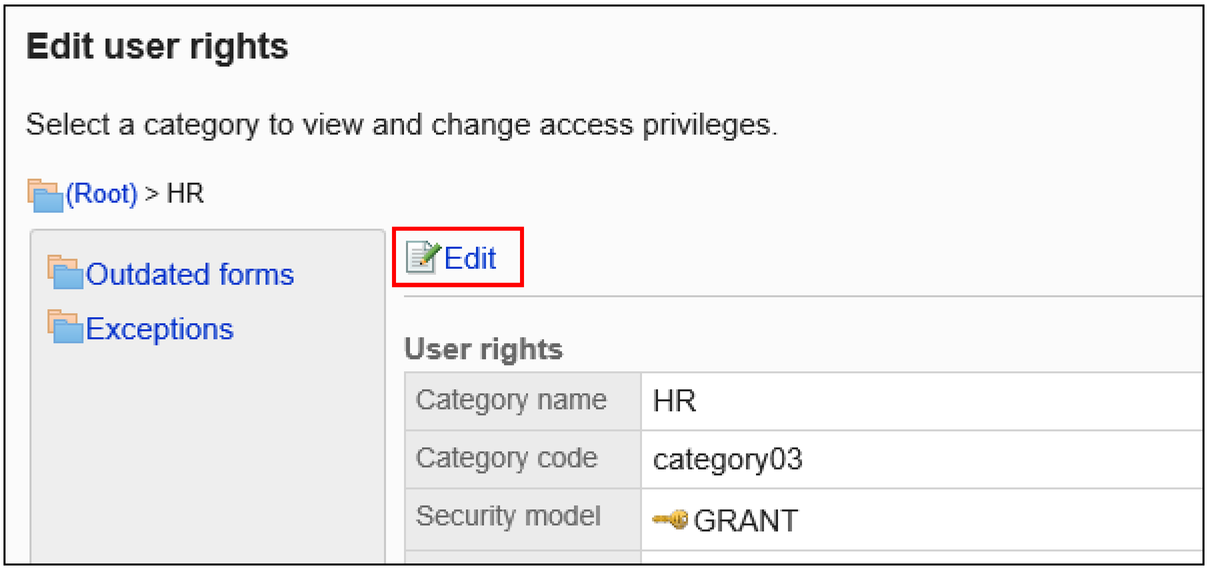
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

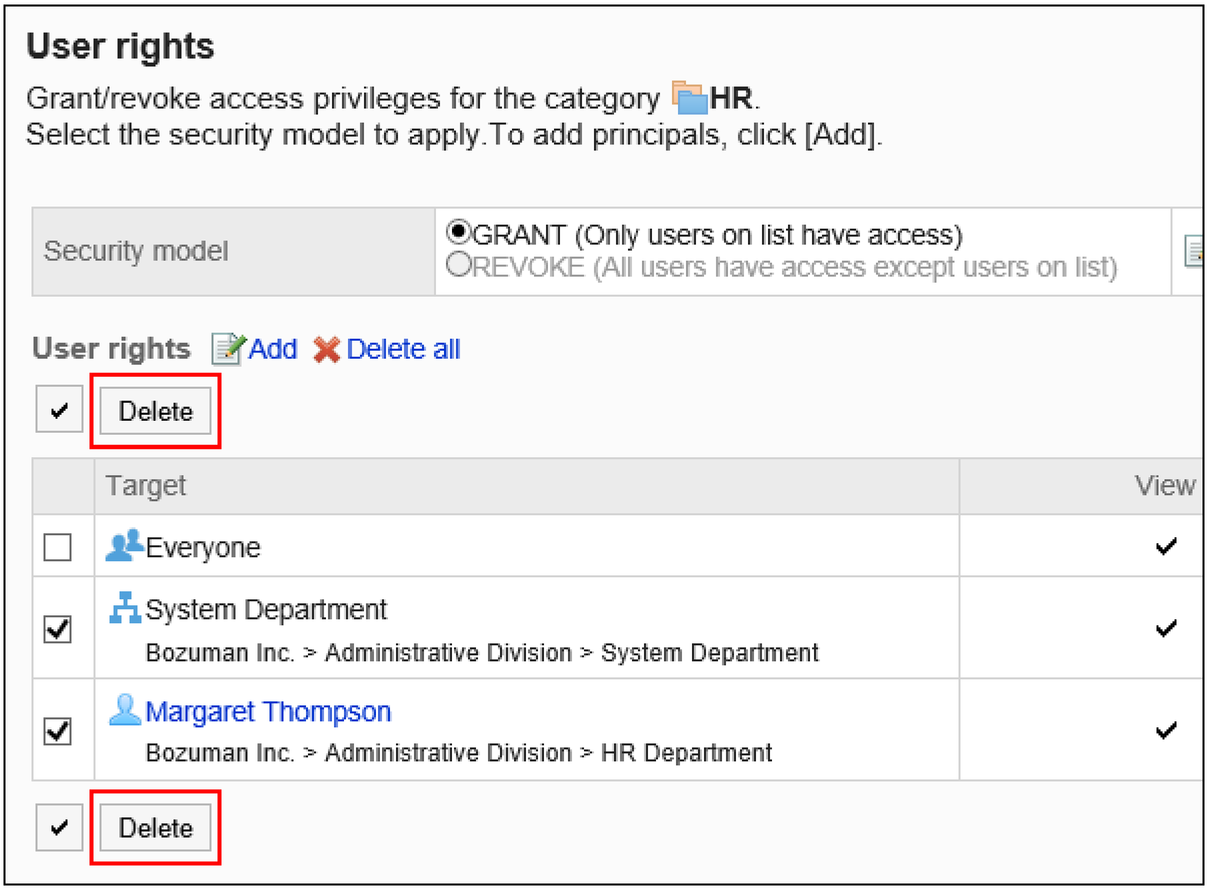
Select and delete user rights.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select a category and click "Edit".**



7. **On "User rights" screen, select the check boxes of the departments, users, or roles to delete, and then click "Delete".**



8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

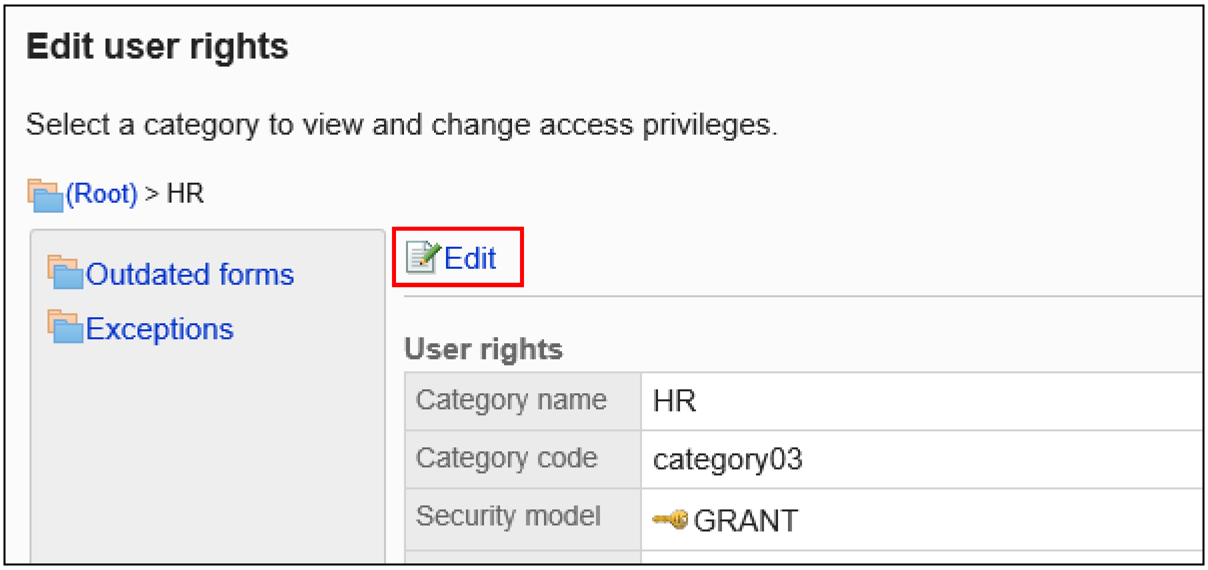
2. **Click "System settings".**

3. **Select "Application settings" tab.**

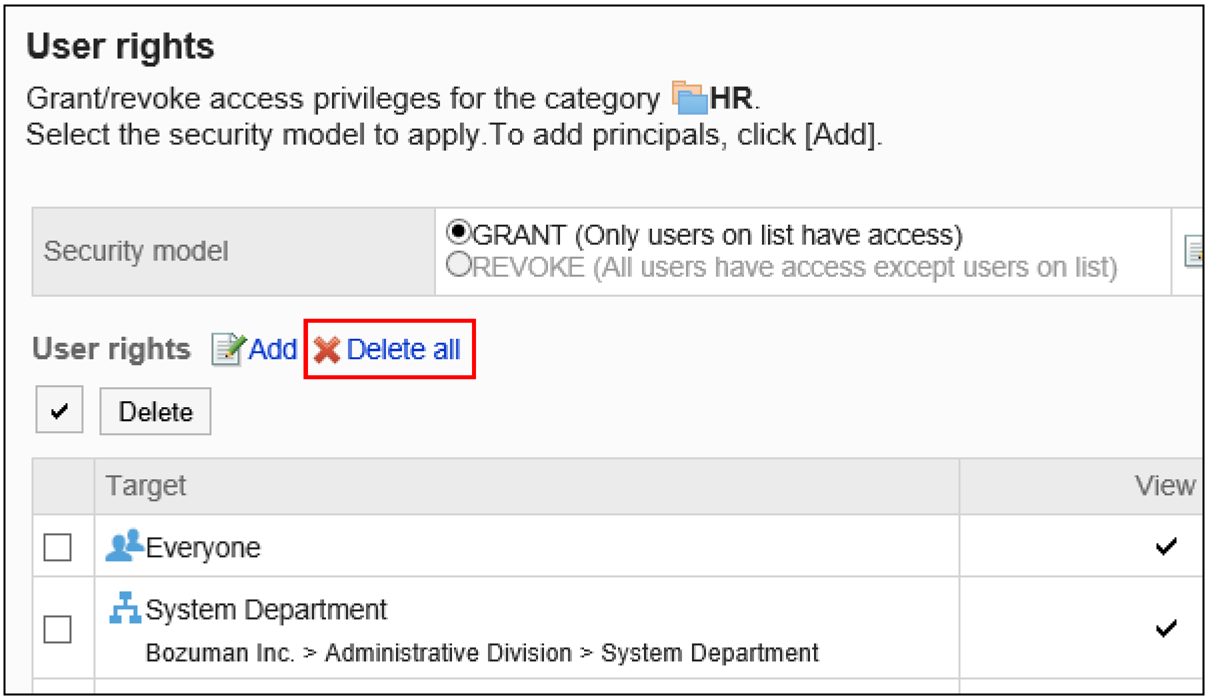
4. **Click "Workflow".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a category and click "Edit".**



7. **On "User rights" screen, click "Delete all".**



8. **Click "Yes" on "Delete all user rights" screen.**

2.13.3.3. Settings to Make Request Data Public

For each category, you can set to make request data public.

By making request data public, users other than the applicants or processors of the application routes can also view

the request data in "Workflow (Public list)" screen.
Only request data completed by the final approver becomes public. Request data in progress is not get public.
You cannot set visibility to "(Uncategorized)".

In combination with the security model, you can set visibility you allow or disallow.
The default setting is set to "GRANT (Only users on list have access)". The request data does not shown to users other than the applicants or processors of the application route.
For information on visibility, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Caution

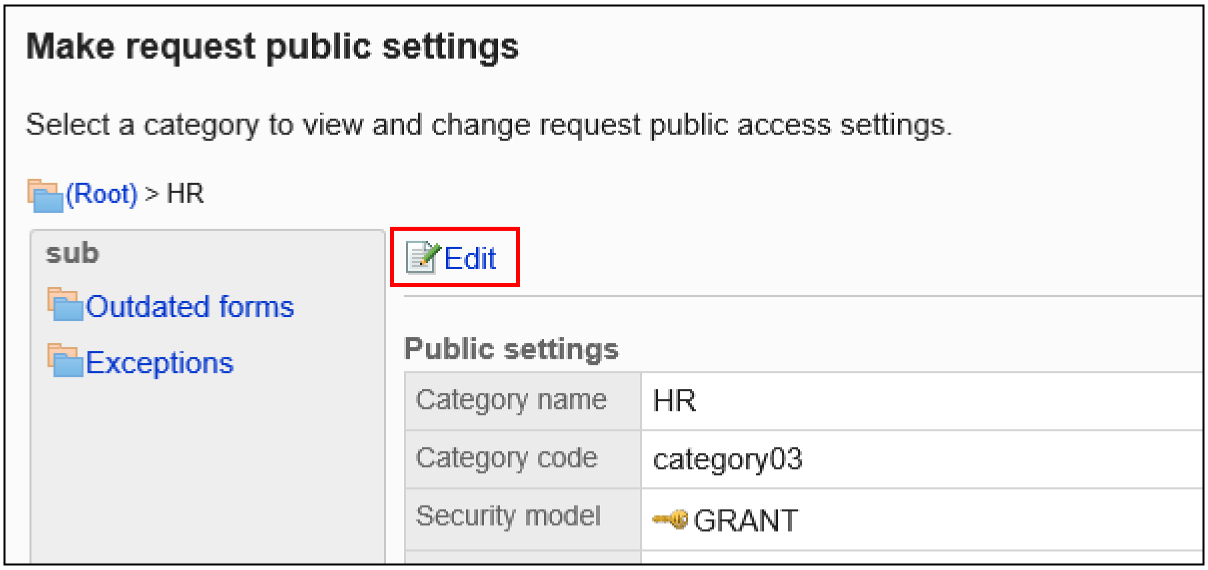
- To show the "Public list" folder in user screen, you need to set the visibility on "(Root)".
- If you want to set visibilities for subcategories, you must also set visibility settings for all parent categories of the subcategories.
- Users can view all the public request data, regardless of their user rights settings. If you have set permissions for items, consider if you make the items public.
- If you change your security model, configured permissions before changing are initialized.

Setting Visibilities

The example shows how to make the request public in case when the security model is "GRANT (Only users on list have access)".

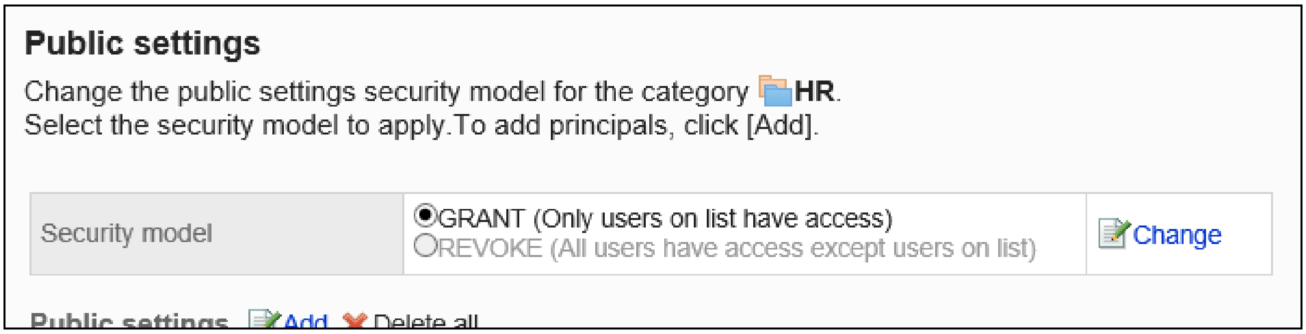
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to make request data public.**
6. **On the screen to set the request data public, select a category and click "Save".**

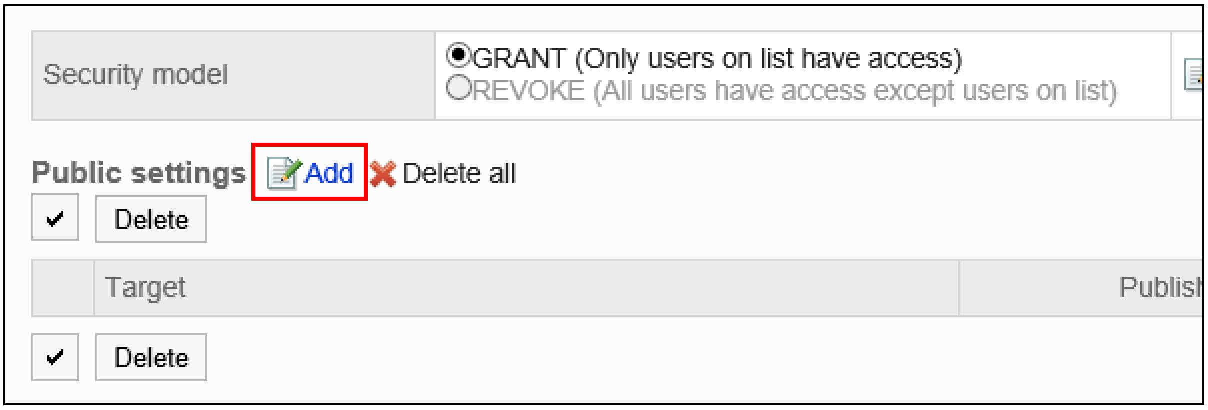


7. On the "Public" list screen, confirm that the security model is "GRANT (Only users on list have access)".

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).



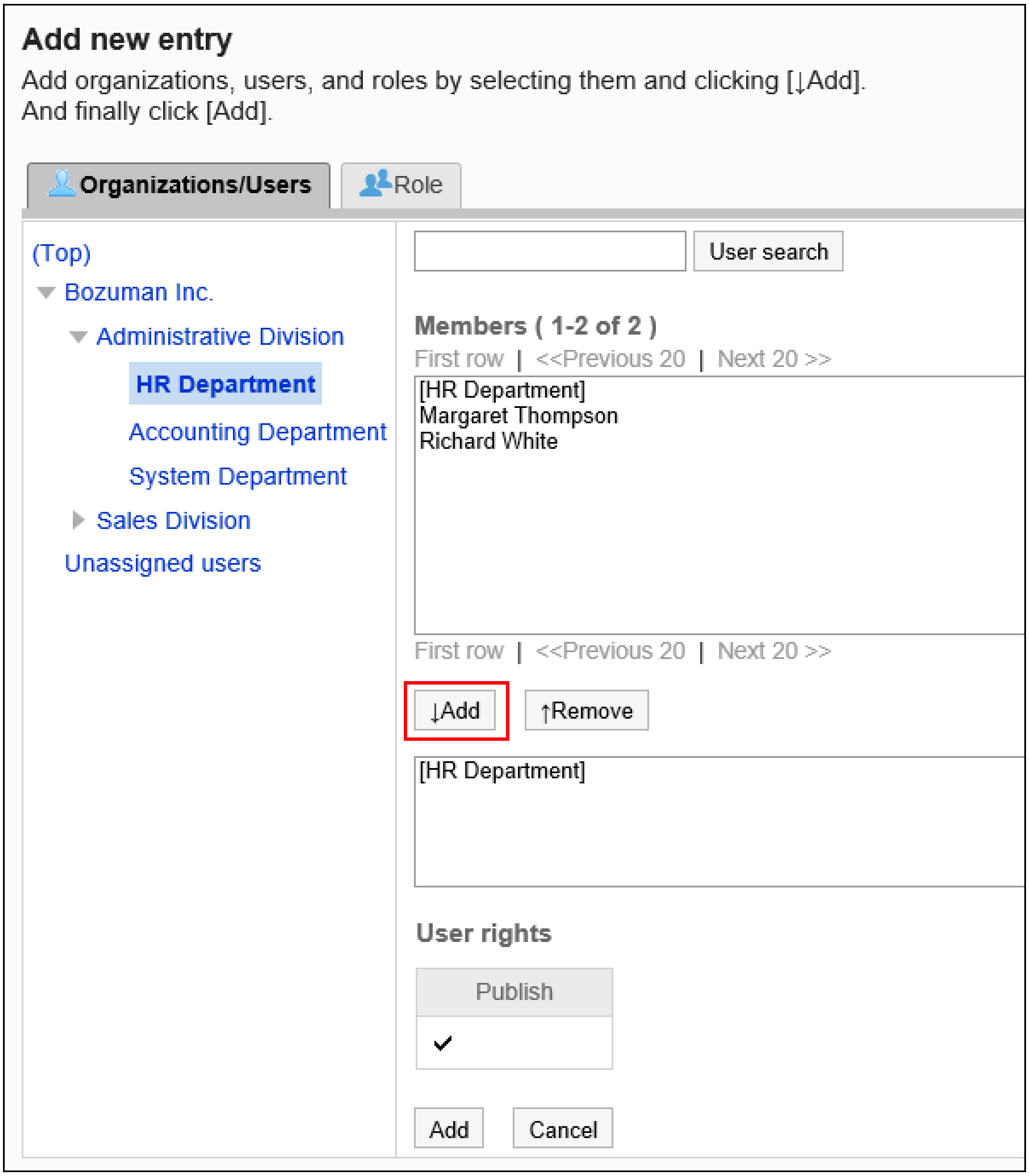
8. Click "Add" in the public setting list.



9. On "Set private watchers", select the department, user, or role to set as watchers, and then click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



10. **Confirm your settings and click "Add".**

Deleting Visibilities

Delete visibility settings set for categories.

If you delete visibility settings, actions that users can perform changes as follows depending on the security model:

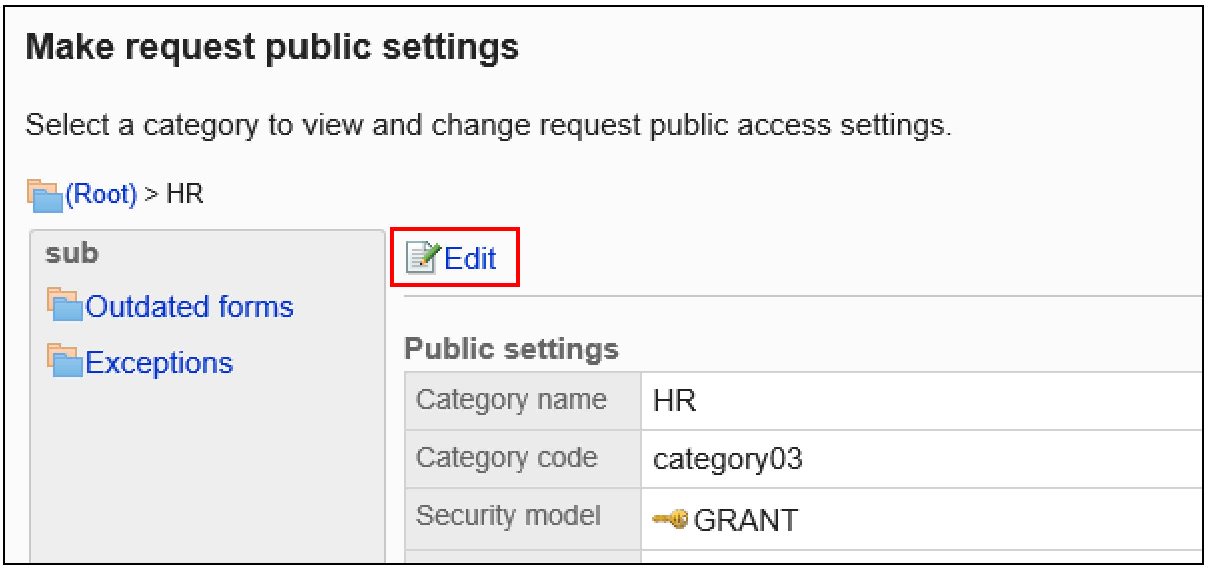
- If the security model is "GRANT (Only users on list have access)":
  Users who are deleted their visibility settings or users who belonged to the departments or roles that are deleted deleted their visibility settings no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who are deleted their visibility settings or users who belonged to the departments or roles that are deleted their visibility settings can now work with items they prohibited to use.

Selecting and Deleting Visibilities

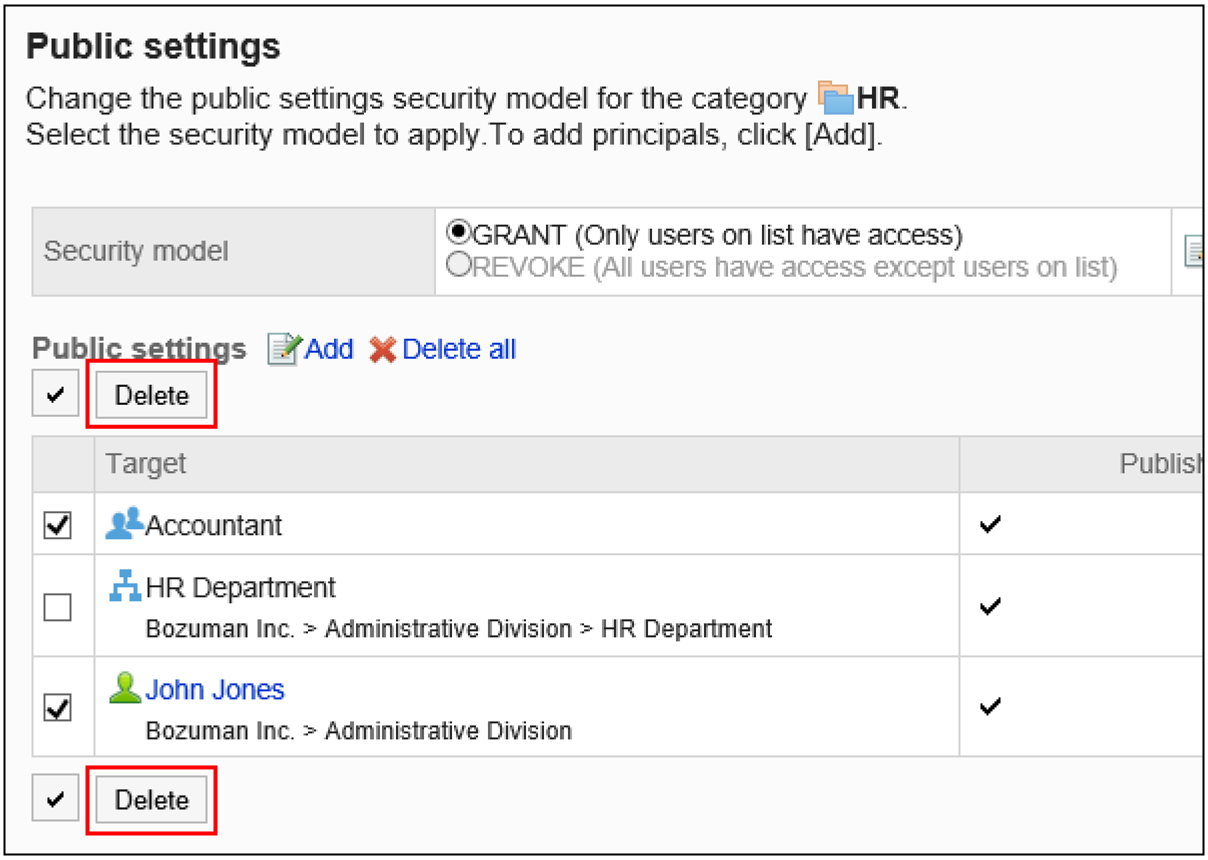
Select visibility settings to delete.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to make request data public.**
6. **On the screen to set the request data public, select a category and click "Save".**



7. **On the screen to set visibilities, select the check boxes of the departments, users, or roles to delete, and then click "Delete".**



8. **Click "Yes" on the delete all visibility settings screen.**

Deleting All Visibilities

Delete all visibility settings.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

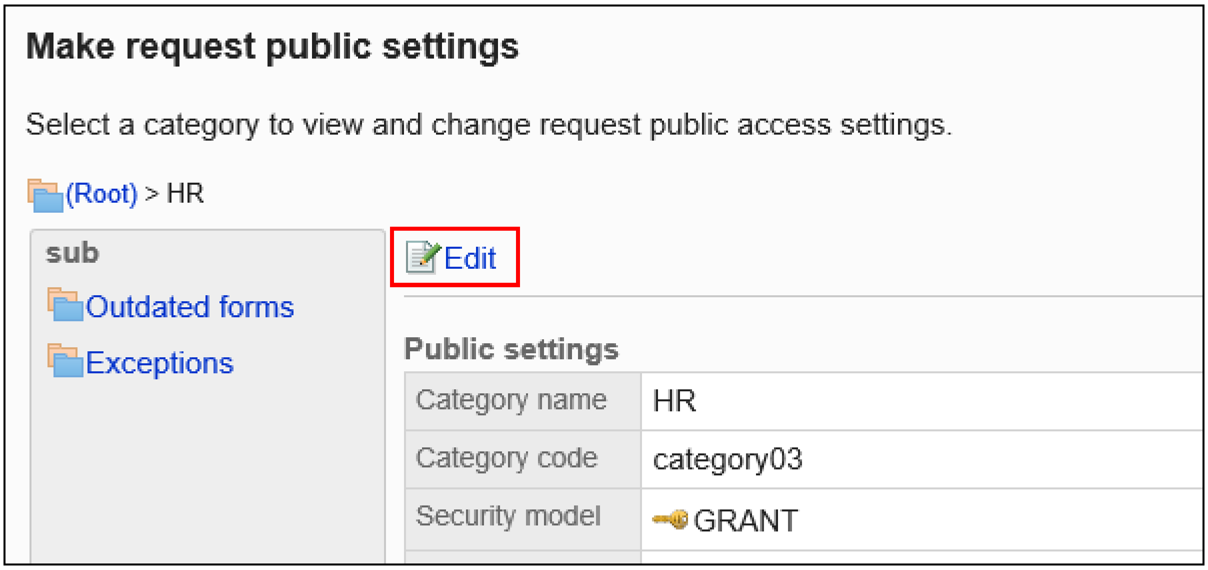
2. **Click "System settings".**

3. **Select "Application settings" tab.**

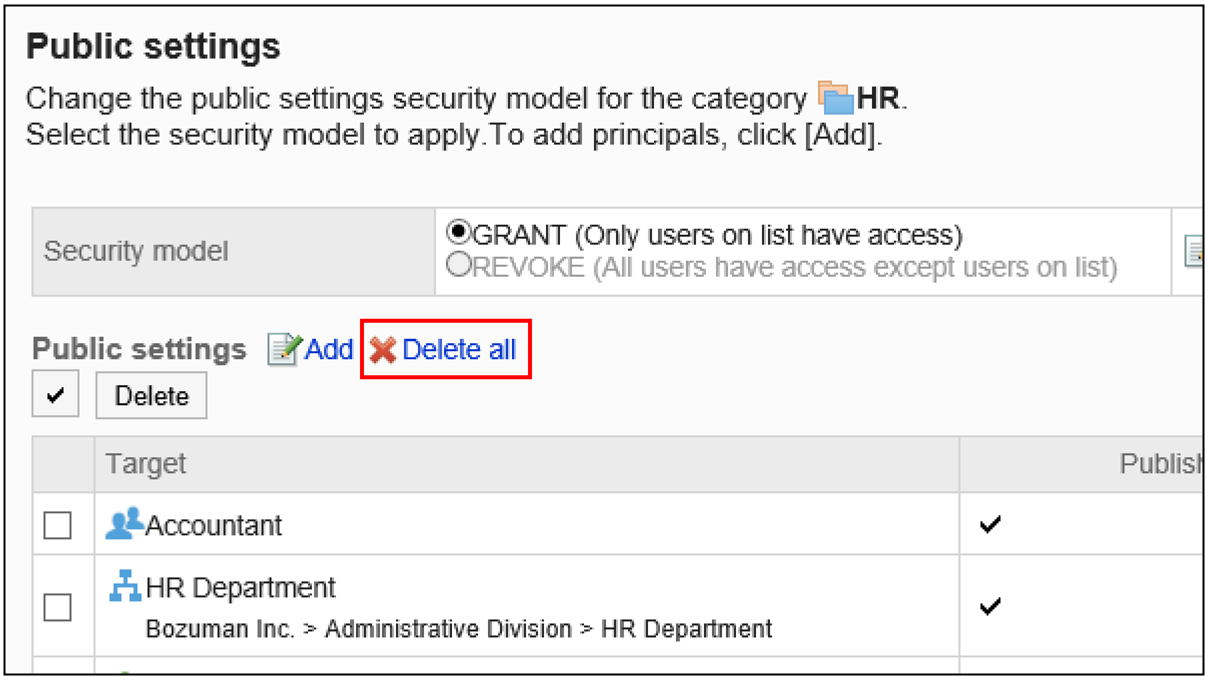
4. **Click "Workflow".**

5. **Click the item to make request data public.**

6. **On the screen to set the request data public, select a category and click "Save".**



7. **On the visibility setting list screen, click "Delete all".**



8. **Click "Yes" on the screen to delete all visibility settings.**

2.13.3.4. Setting Operational Administrative Privileges for Categories

For each category, set operational administrators for departments, users, or roles.

Operational administrators can administer request data and request forms in the category and subcategories in it.

You use "Options" field on the user screen. The following menus are listed in the "Options" field:

- Managing Request Data:

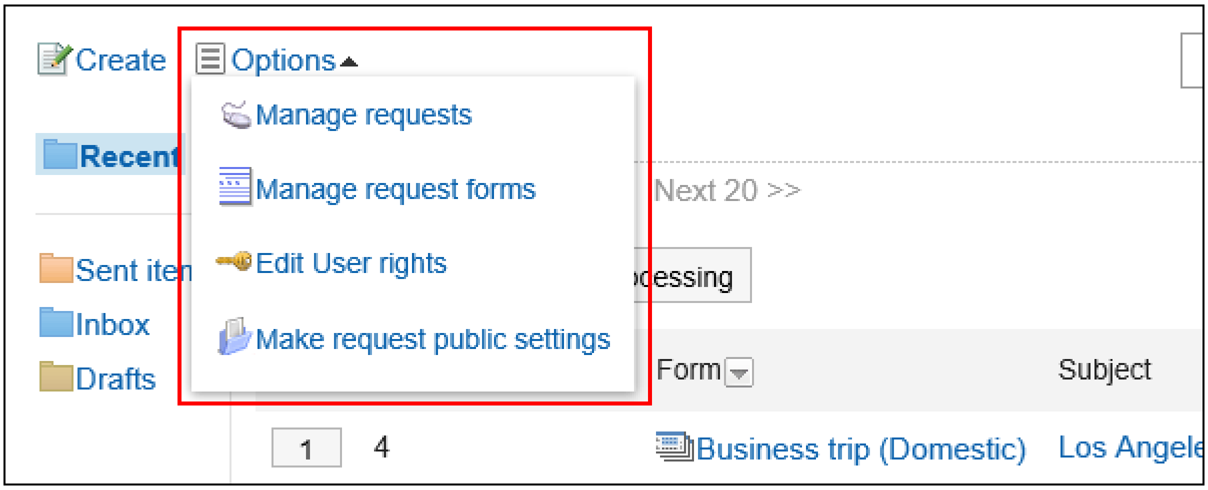
  For details, refer to Managing Request Data(1461Page).
- Managing Request Forms

  For details, refer to Setting up Request Forms(1316Page).

  You also can view request forms in categories that you do not have operational administrative permissions.
- User Rights settings:

  For details, refer to Setting Access Permissions for Categories(1249Page).
- Settings to Make Request Data Public:

  For details, refer to Settings to Make Request Data Public(1255Page).



Adding Operational Administrative Privileges

Grant operational administrative privileges for each category.

You cannot grant operational administrative privileges to "(Uncategorized)" categories.

Steps:

1. Click the administration menu icon (gear icon) in the header.

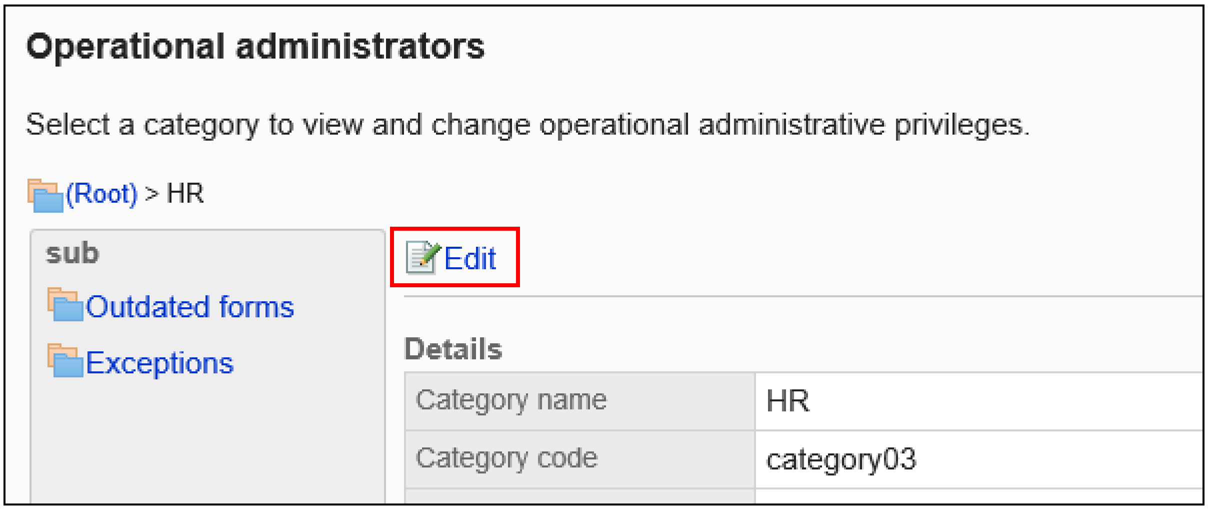
2. Click "System settings".

3. Select "Application settings" tab.

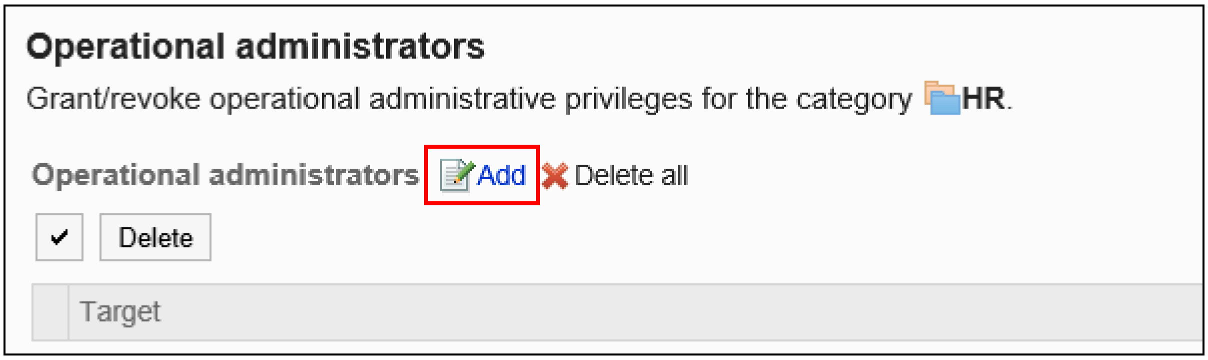
4. **Click "Workflow".**

5. **Click "Operational administrators".**

6. **On "Operational administrators" screen, select a category and click "Save".**



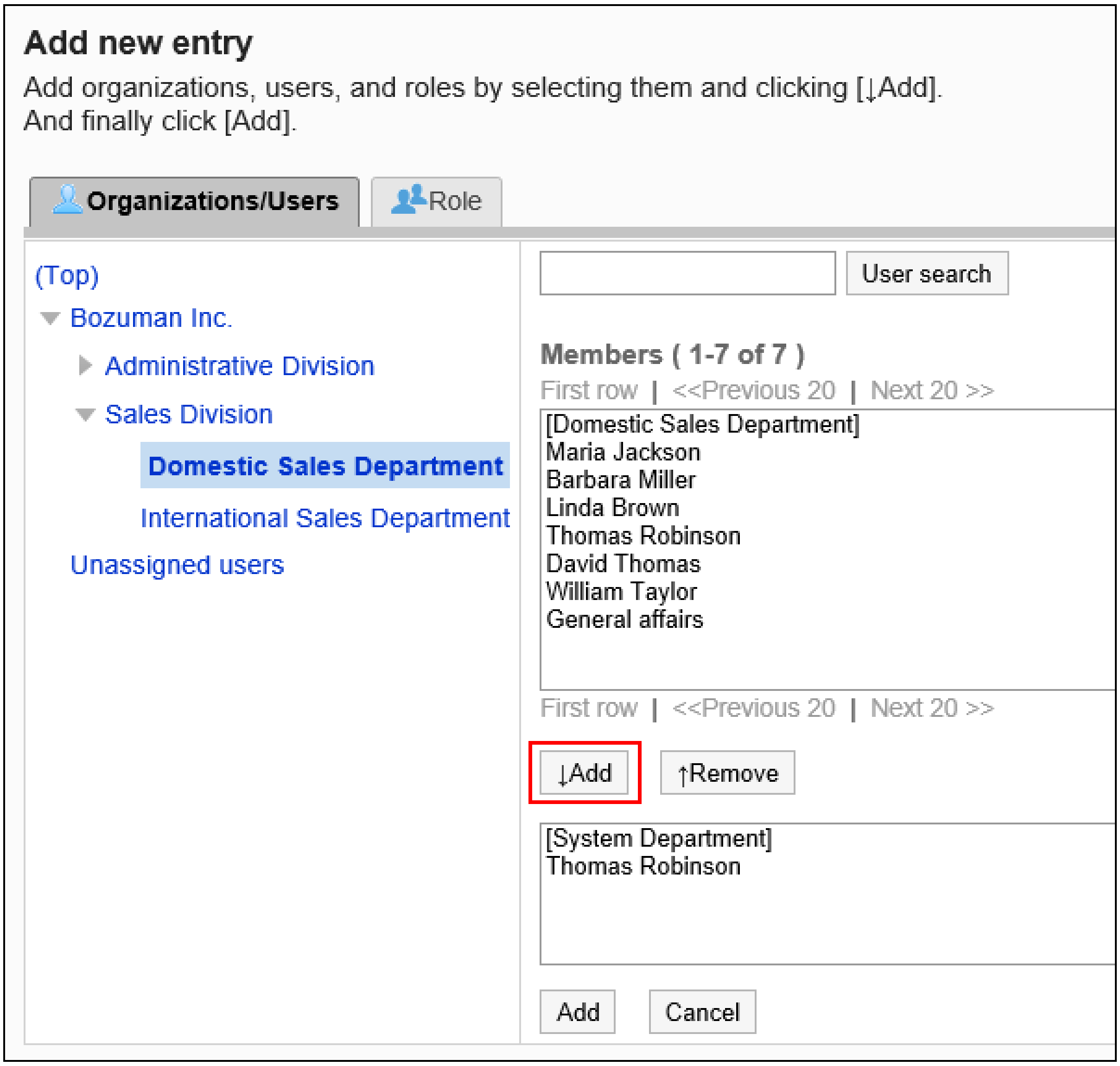
7. **On the screen for operational administrative privilege list, click "Add".**



8. **On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. **Confirm your settings and click "Add".**

Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

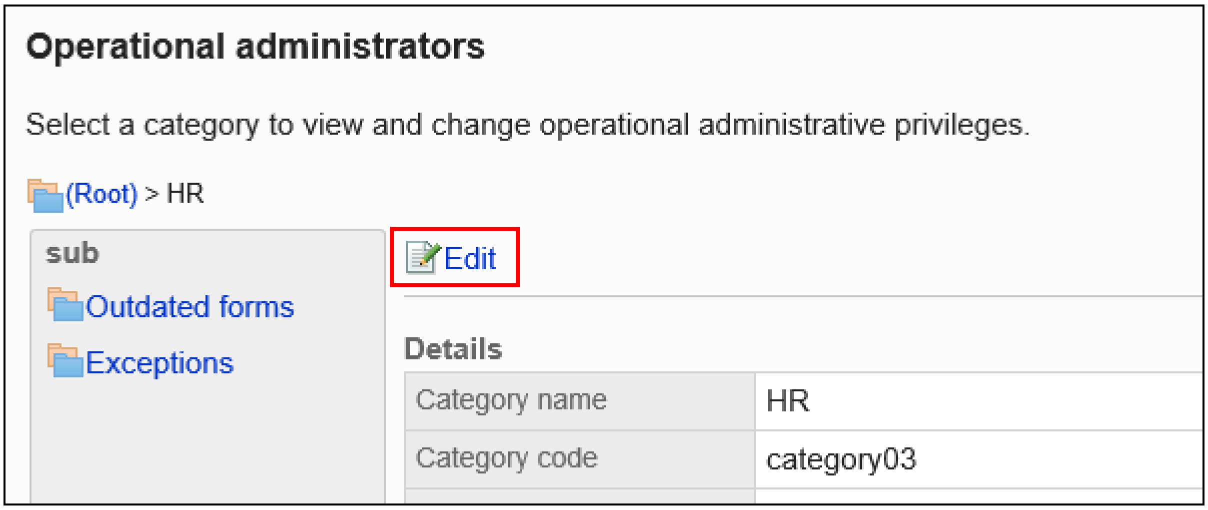
2. **Click "System settings".**

3. **Select "Application settings" tab.**

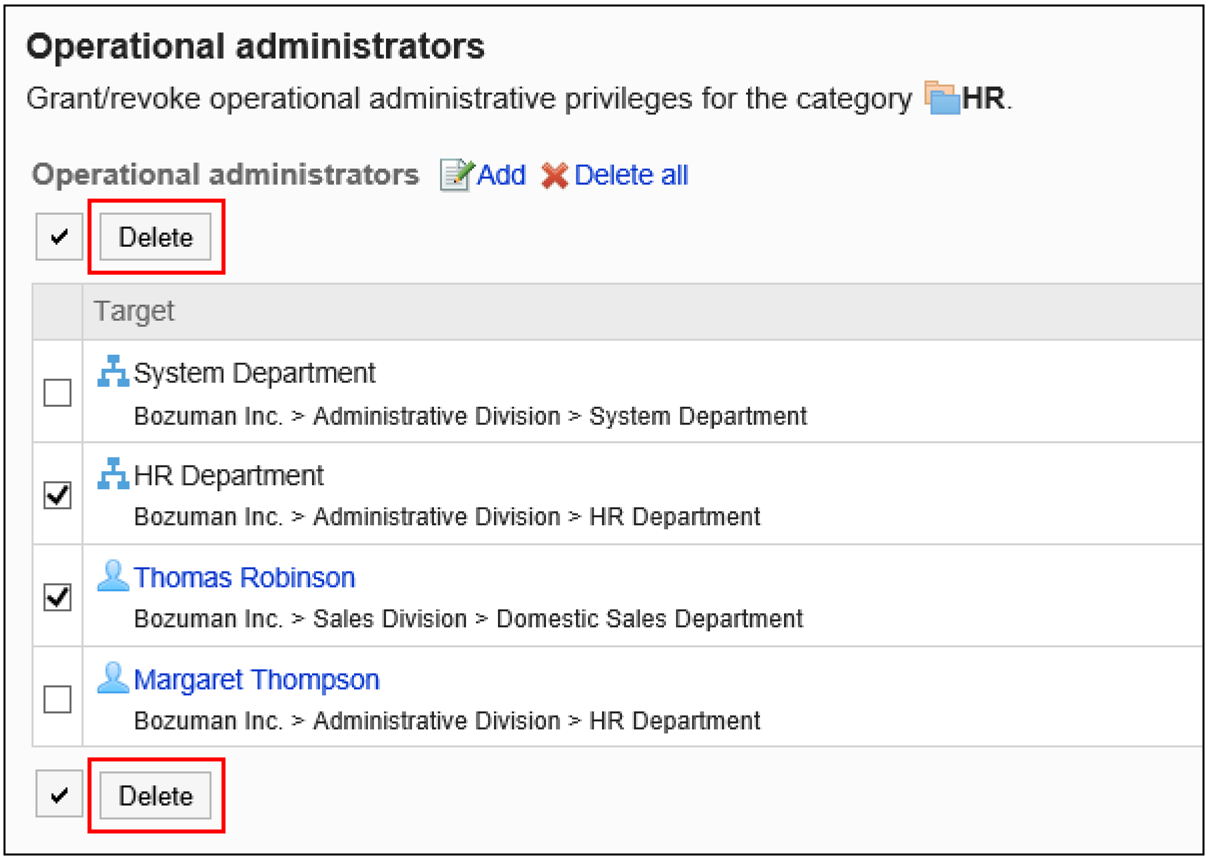
4. **Click "Workflow".**

5. **Click "Operational administrators".**

6. **On "Operational administrators" screen, select a category and click "Save".**



7. **On the screen for operational administrative privilege list, select the check boxes of the organizations, users, or roles to delete operational administrative privileges, and then click "Delete".**



8. **Click "Yes" on the screen to delete all operational administrative privileges.**

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

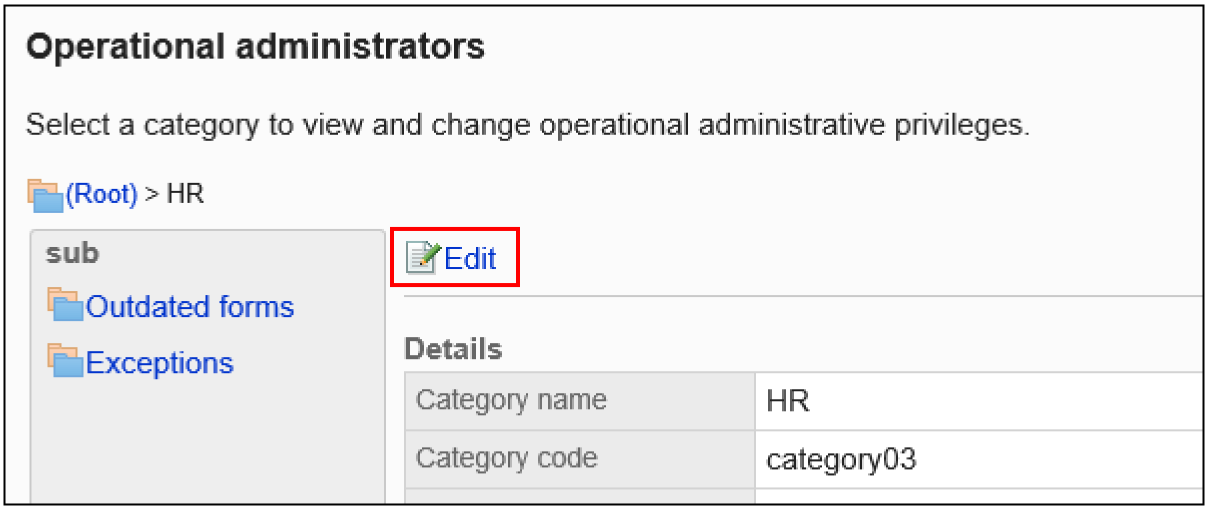
2. **Click "System settings".**

3. **Select "Application settings" tab.**

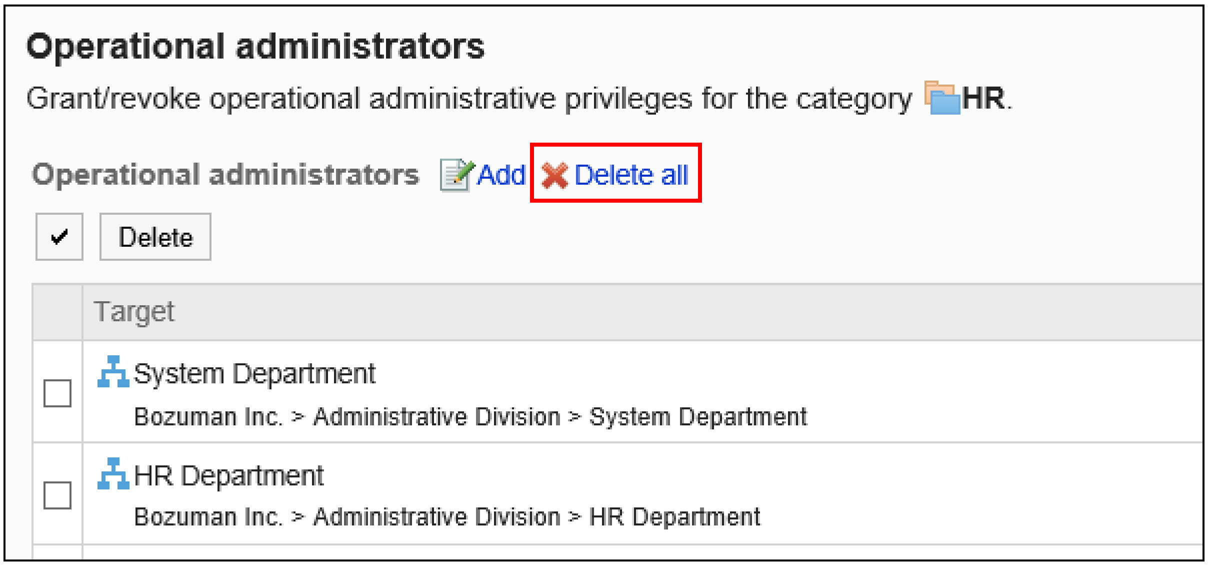
4. **Click "Workflow".**

5. **Click "Operational administrators".**

6. **On "Operational administrators" screen, select a category and click "Save".**



7. **On the screen for "List of operational administrative privilege", click Delete all.**



8. **Click "Yes" on the delete all operational administrative privileges screen.**

2.13.4. Setting up Shared Routes

A request route must be set for the request form. This section describes how to set up a shared route and route settings.

References

- Differences between shared and dedicated routes(1268Page)
- Approval route settings (shared route)(1273Page)
- Routing route settings (shared route)(1292Page)
- Settings in Shared Routes List(1312Page)
- Applying a shared route(1401Page)

2.13.4.1. Differences between Shared Routes and Dedicated routes

In workflow, you can create "shared route" and "private route".

Set either route in the request form, depending on whether the process flow is generic or special.

- **Shared route**:
  A route that you can create beforehand and share with multiple request forms.
  You can create or edit routes in the route list screen.
- **Dedicated route:**
  When you create a request form, this is a route that you can create for the request form only.
  You can create or edit from the screen for request form details.

Combination of Routes

You can create a request route in the following combinations

- **Approval Route only**
  Omit the circulations and configure them only for approval.
  If you do not need to carry out the circulations for the request, create a route in this configuration.
- **Acknowledgement route only**
  You can only configure routes for requests, such as approval and rejection, which are not required.
  Create a route in this configuration if only the circulations are intended.

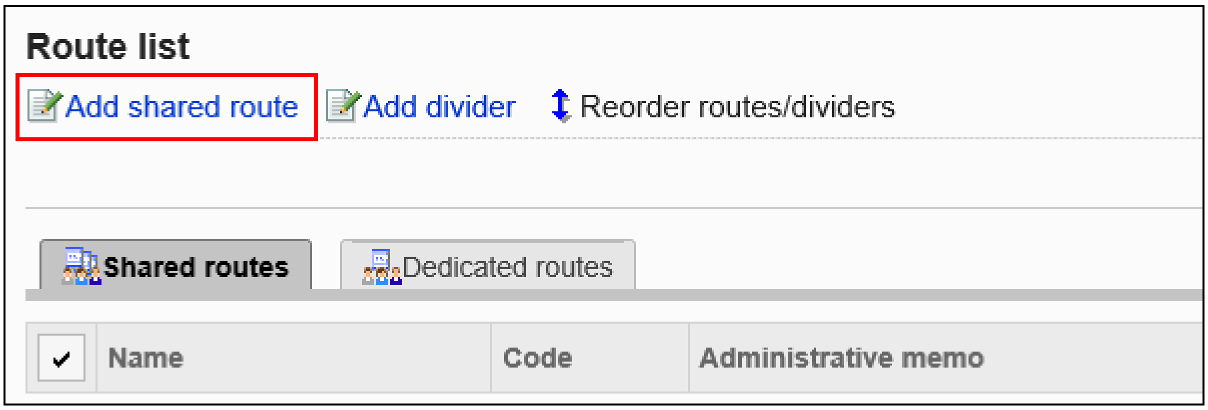
- **Approval Routes and Acknowledgement Routes**
  This is the maximum structure for the next route to be routed through a route for approval of requests.
  Create a route with this structure, for example, when you want to request an important approval.

2.13.4.2. Adding Shared Routes

Add a shared route.
Set basic information such as route name and Route code.

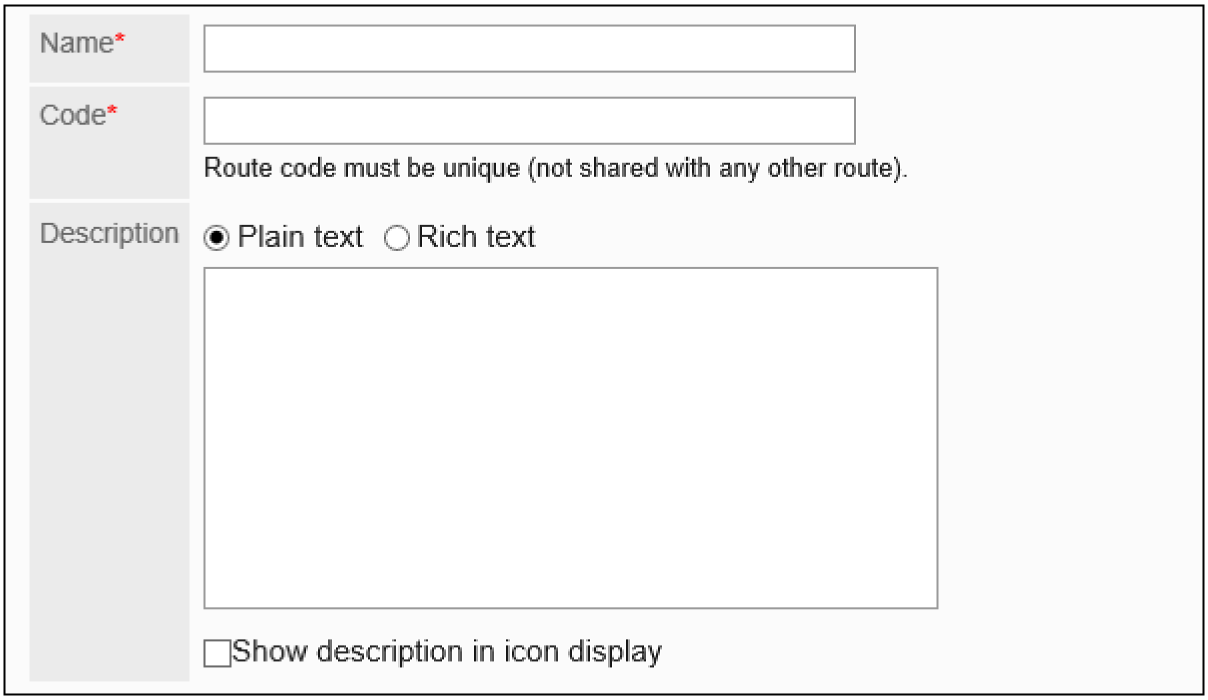
Steps:

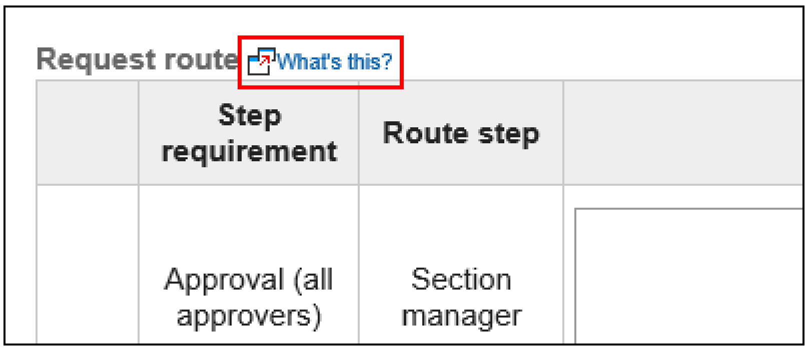
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and then click the item to add shared routes.**



7. **On the "Add shared route" screen, set the required items.**
8. **Confirm your settings and click "Add".**

Shared Route Settings



Item	Description
Route Name	Enter the route name.
Route code	Unique code for identifying routes.
Route description	Enter a description of the shared route. You can use Rich Text Formatting. To display the description on another screen, select the check box for "Show description as Icon". The information entered is displayed on the "Create request (route)" screen of the user. 

2.13.4.3. Changing Shared Routes

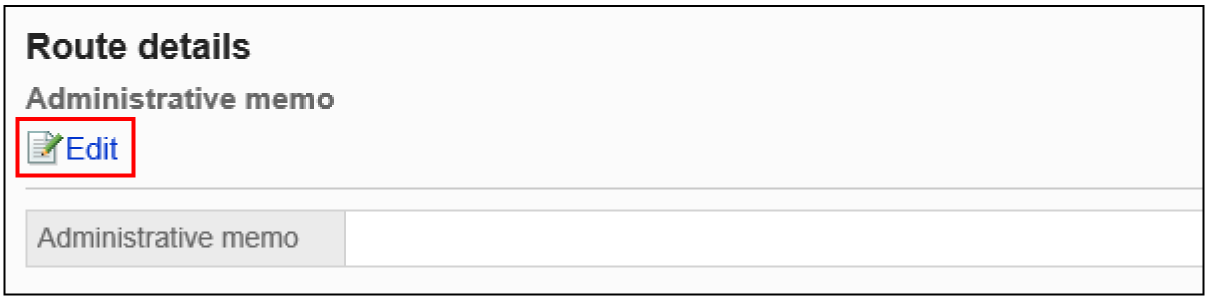
Change administrator notes and route information for shared routes.

Changing Notes for Administrators

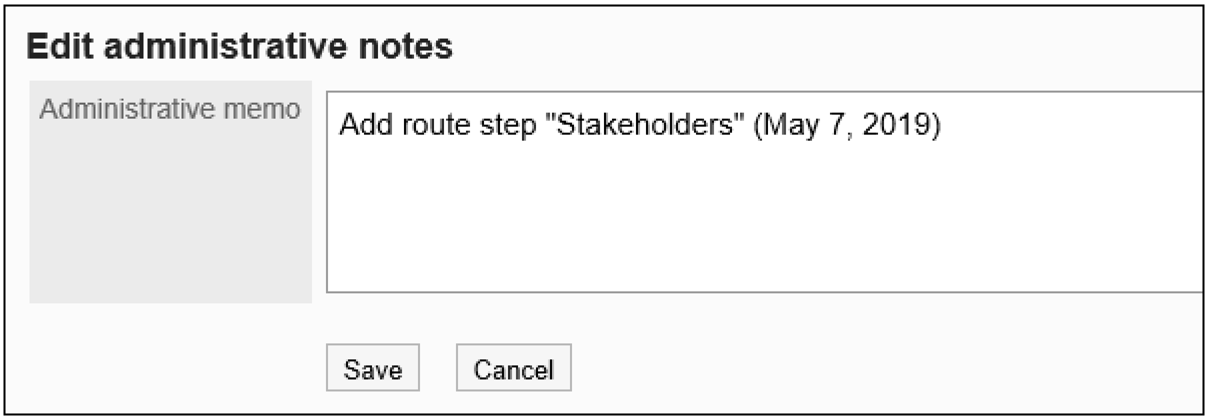
You can add work histories and notes in notes for administrators.
The notes for administrators are displayed only on system administration screens. They are not shown on user screens.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared route tab, and then click the route name of the shared route to change the administrative notes.**
7. **On the route details screen, click "Save" in notes for administrators.**



8. **On the screen to change notes for administrators, enter your work history and notes.**



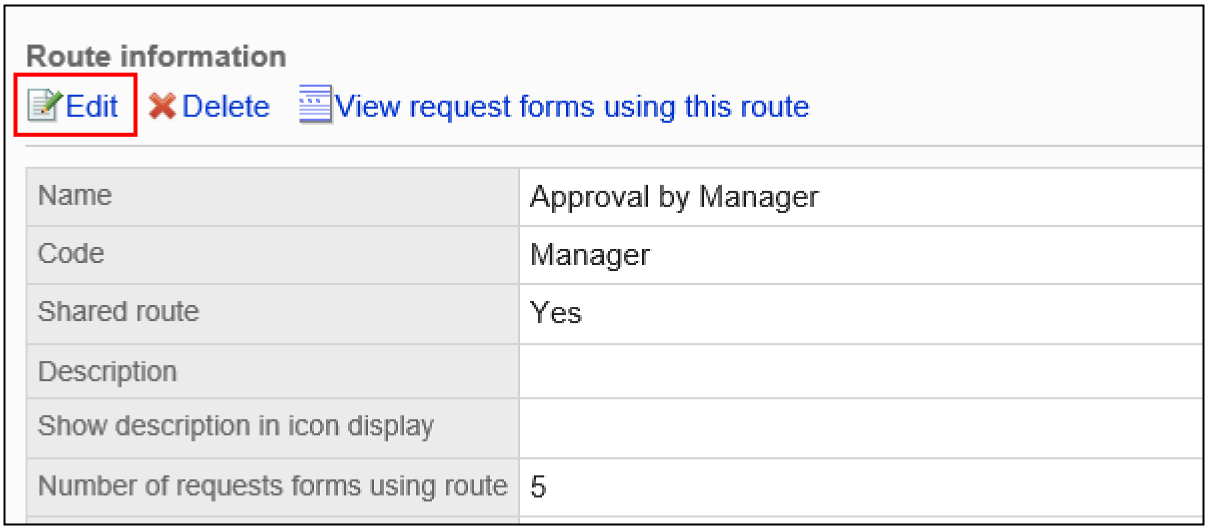
9. **Confirm your settings and click "Save".**

Changing Route Information

Change the route information in the shared route.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the "Route list" screen, select the "Shared Routes" tab, and then click the route name of the shared route for which you want to change the route information.**
7. **On the route details screen, click "Save" in route information.**



8. On the "Change shared route" screen, set the required items.

For details, refer to settings for shared routes(1270Page).

9. Confirm your settings and click "Save".

2.13.4.4. Setting up Approval Routes (Shared Routes)

Set up a route step for approving the request. Multiple route steps can be set.

You can also set the approver for each route step beforehand.

Adding Route Steps

Add a route step for the approval route.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Workflow".

5. **Click the route list.**

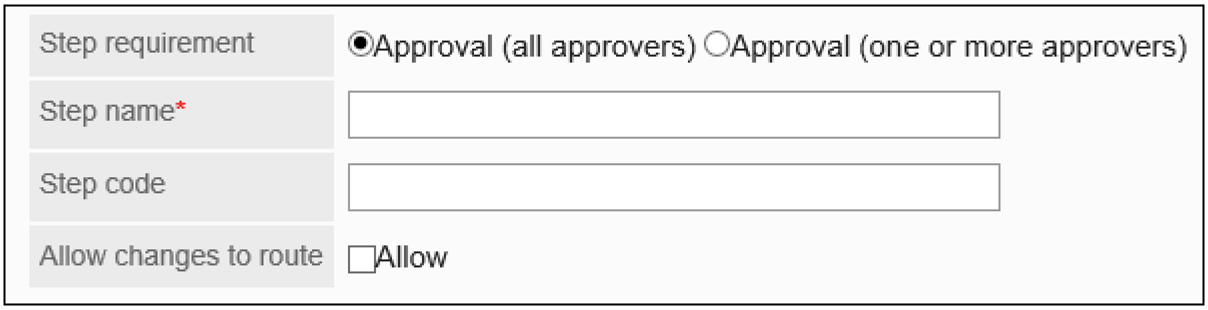
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click "Add" in "Approval route".**

8. **On the "Add route Step" screen, set the required items.**

9. **Confirm your settings and click "Add".**

Setting Items of Route Steps for Approval Routes



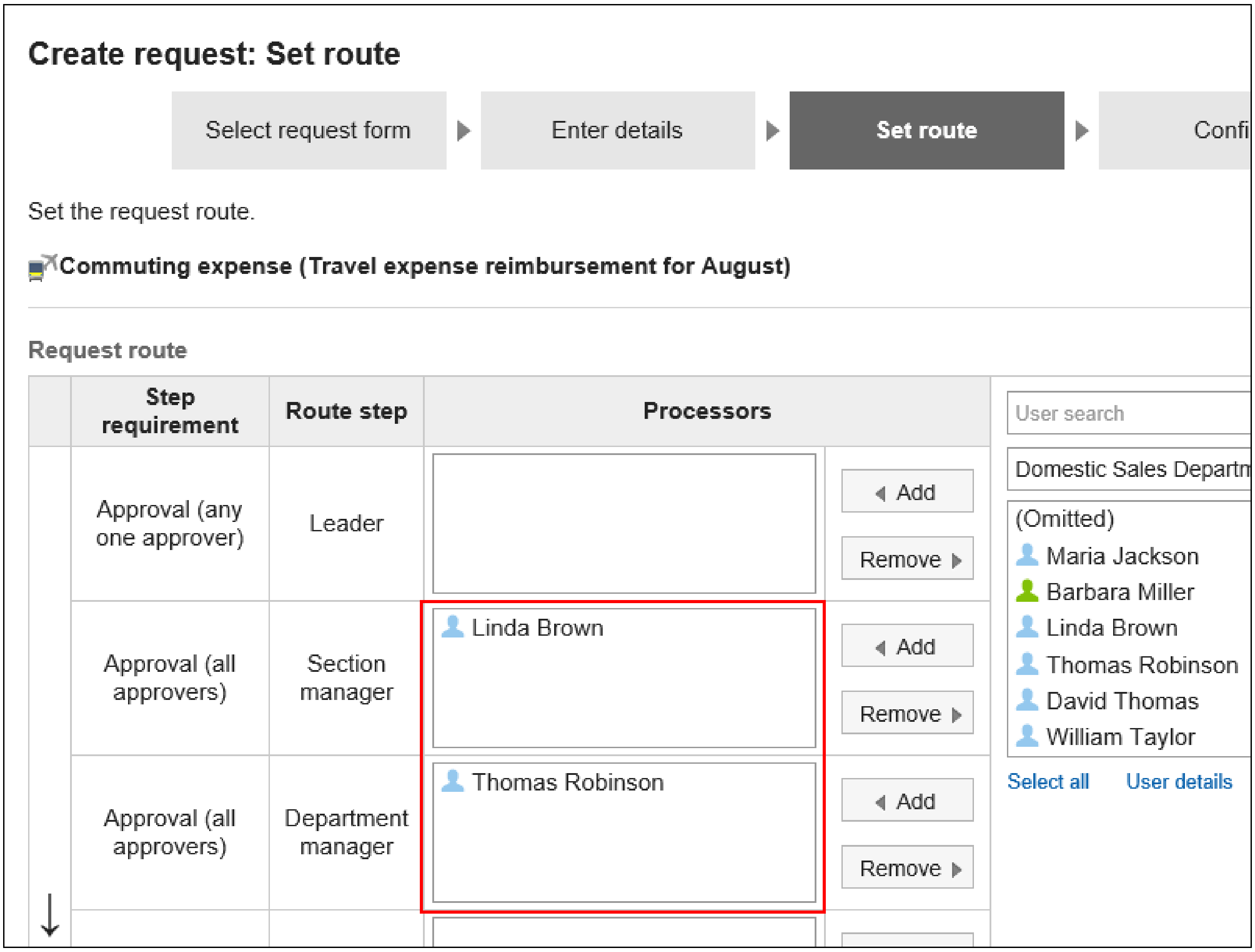
Item	Description
Route type	Select the approval style for the route step. • Approval (all approvers): Multiple approvers can be set. If all processors have been approved by the request, proceed to the next route step. If one of the processors you have set returns a request, the request will be returned. The same is true in the case of rejecting the request. • Approval (any one approver): Multiple approvers can be set.

Item	Description
	If one of the processors you have set approves the request, proceed to the next route step.
Route Step Name	Enter the route step name.
Step code	An item code is a unique code to identify items for JavaScript customization. If you do not use the JavaScript customization, you do not need to set the route step code. You can use single-byte alphanumeric characters, hyphens, and _ (underscores). When a step code is duplicated in one request form, an error occurs. Up to 100 characters can be entered in a code. If 101 or more characters are entered, the first 100 characters are registered.
Allow Route change	To allow a processor to reroute, select the "Allow" check box. If a route change is allowed, the processor can be changed by other processors in the same route step and in the subsequent route step, when processors are processed in this route step.

Setting Default Values for Route Steps

Setting the default value for the route step simplifies the job of the applicant.

Organization, user, or role.



Adding Default Values

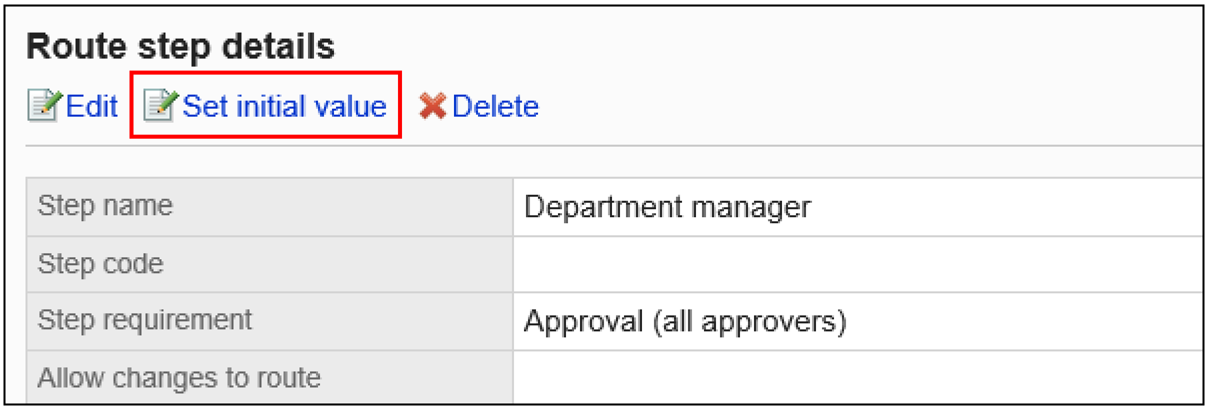
Adds the default value for the route step.

Steps:

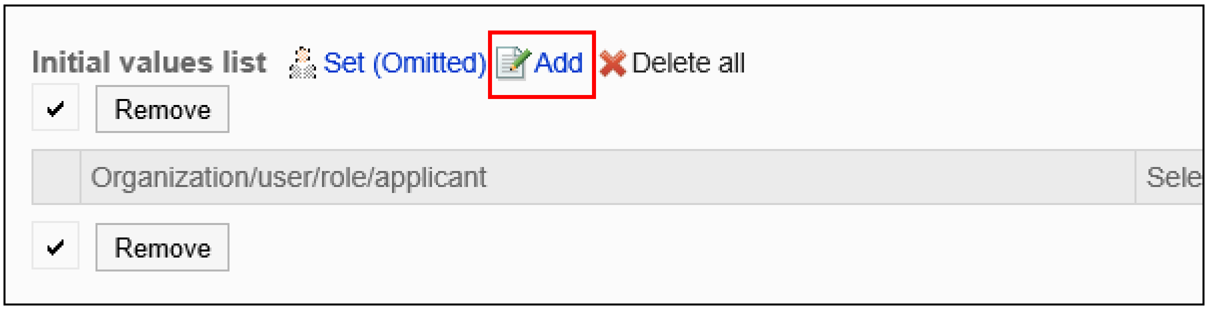
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



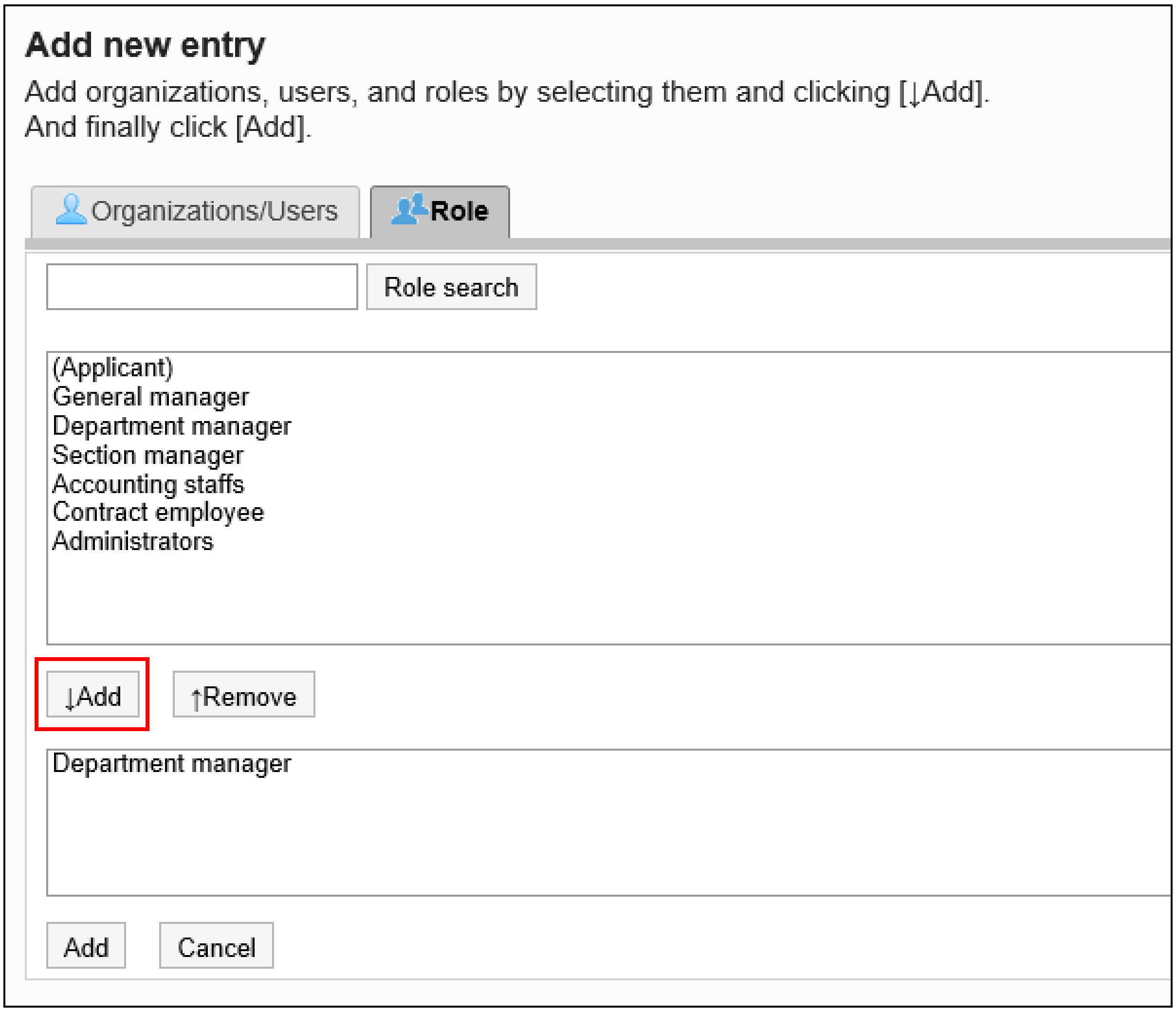
9. **On the screen to set default settings, click "Add" in the default value list.**



10. **On "Add default watchers" screen, select the organization, user, or role, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



11. **Confirm your settings and click "Add".**

Setting Default Superior

When you add roles to the initial value of a route step, users who have the roles that you have set can display only the superior of the applicant when the user requests.
Superior is displayed as a "priority organization" of the applicant, or a user who belongs to the organization.

Users Shown as Superiors

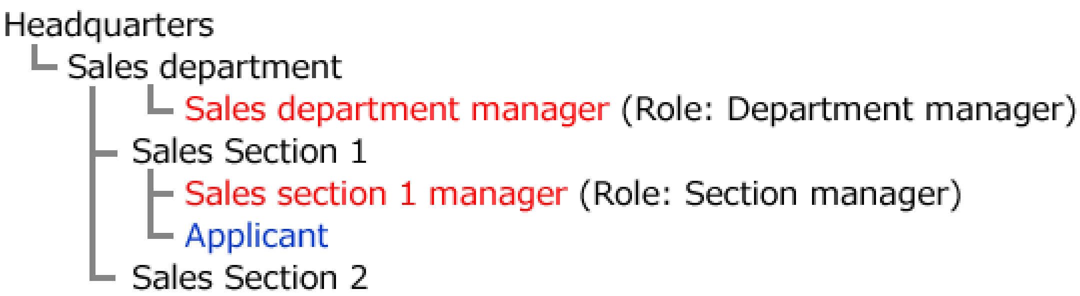
If you have configured the superiors for the default value of a route step, the users shown as the superiors in the processor field are determined by the following conditions.

1. A user who belongs to the "priority organization" of the applicant and who has the specified role
2. A user who is a member of the organization that is higher in the "priority organization" of the applicant and who has the specified role

If there are any users who match condition 1, those users are displayed as the superiors in the processor field.
If there are no users who match the condition 1, users meeting condition 2 are displayed as the superiors in the processor field.

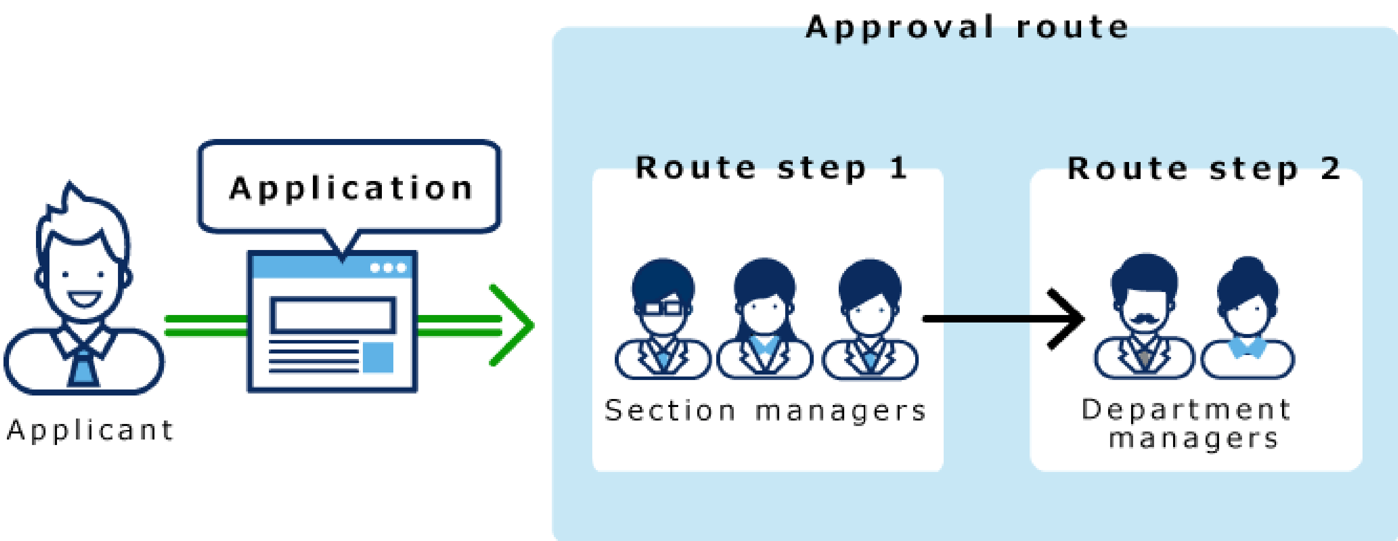
Image of Usage

This section describes how to create a request data for a user who is a member of the sales department.
The priority organizations of the applicants are the sales department.
The above-said applicant is the director of Sales department and one division manager. The Sales department manager has the role "manager" and the "Manager" section.



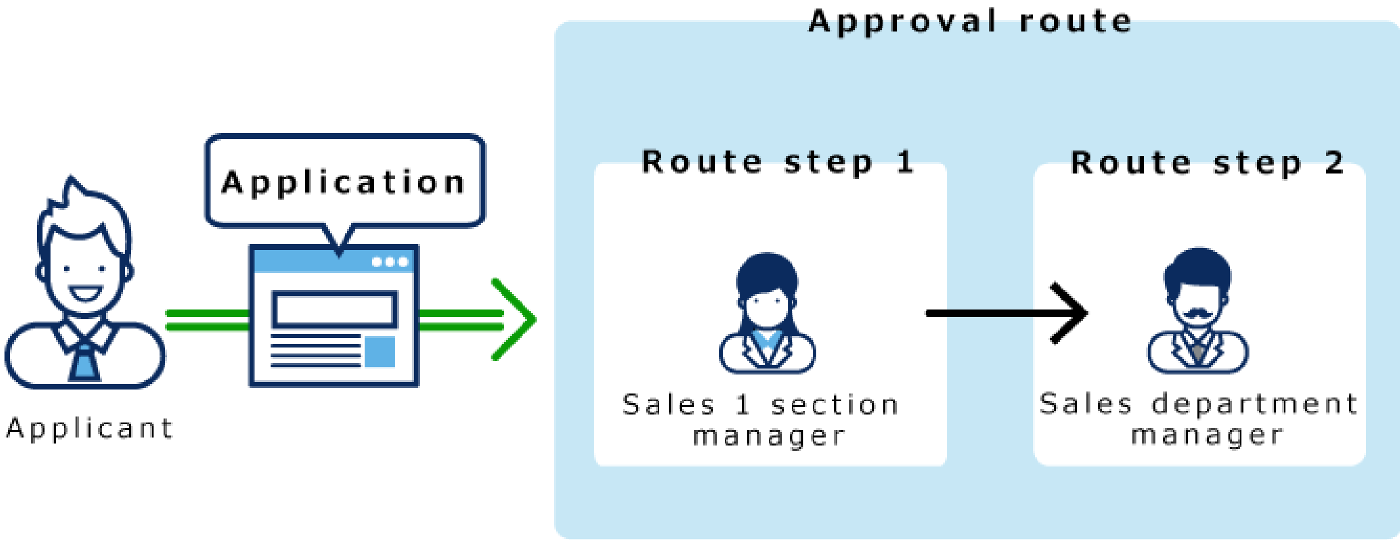
If you have set the role of "manager" as the initial value of step 1 and the "manager" for the initial value of route step 2, when you create the request data, all users belonging to each role will be set as processors.
The applicant must select his or her top length from among the processors.

Before superior:



If you set superior in Route Step 1 and Step 2, only your superior is automatically set for the processor of each route step.

After setting superior:



Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

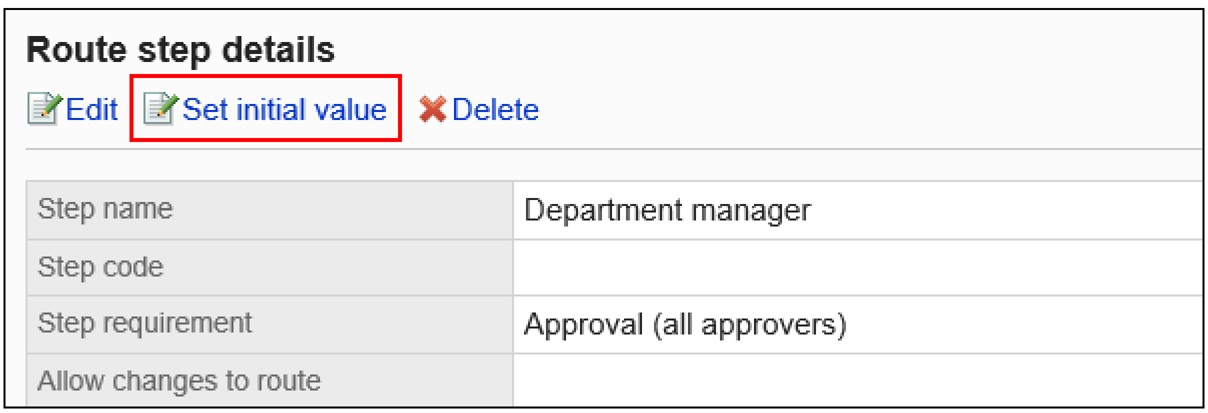
4. **Click "Workflow".**

5. **Click the route list.**

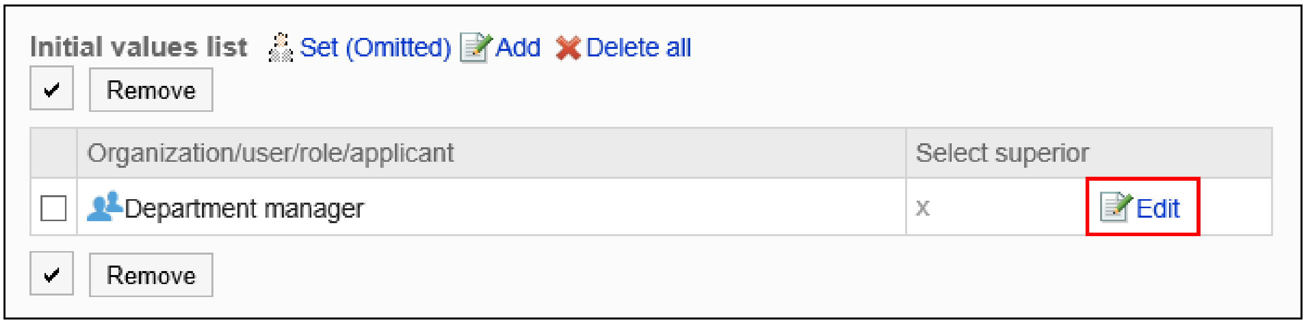
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Approval route" field.**

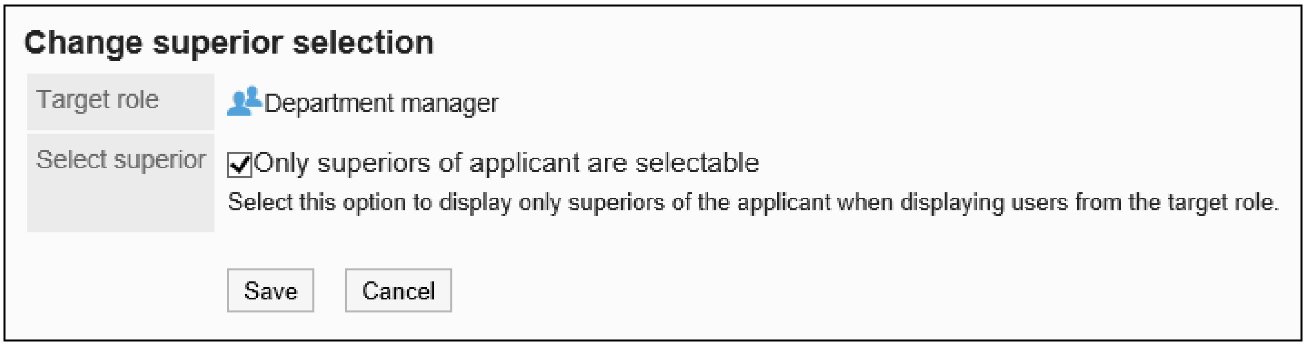
8. **On the "Route Step Details" screen, click "Set Default".**



9. On the screen to set default settings, click "Change" in the default value list for the role to set a superior.

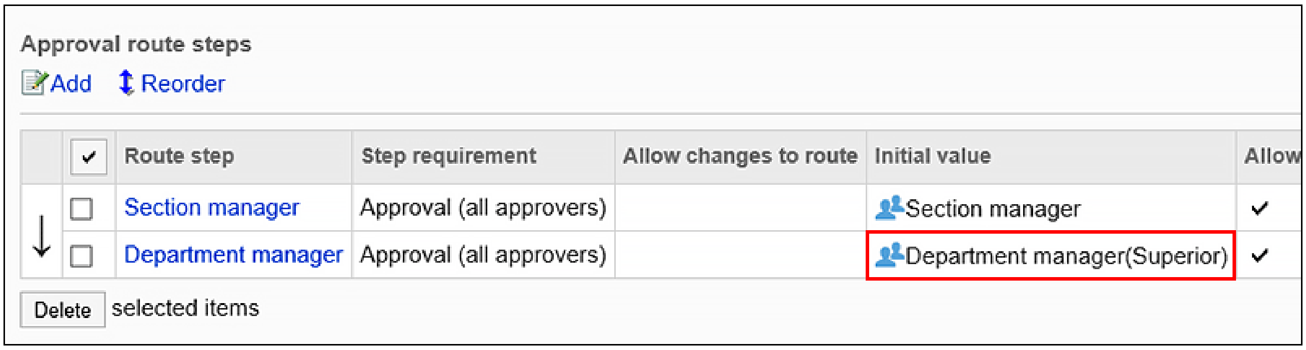


10. On the "Change superior selection" screen, select the "Select the" check box.



11. Confirm your settings and click "Save".

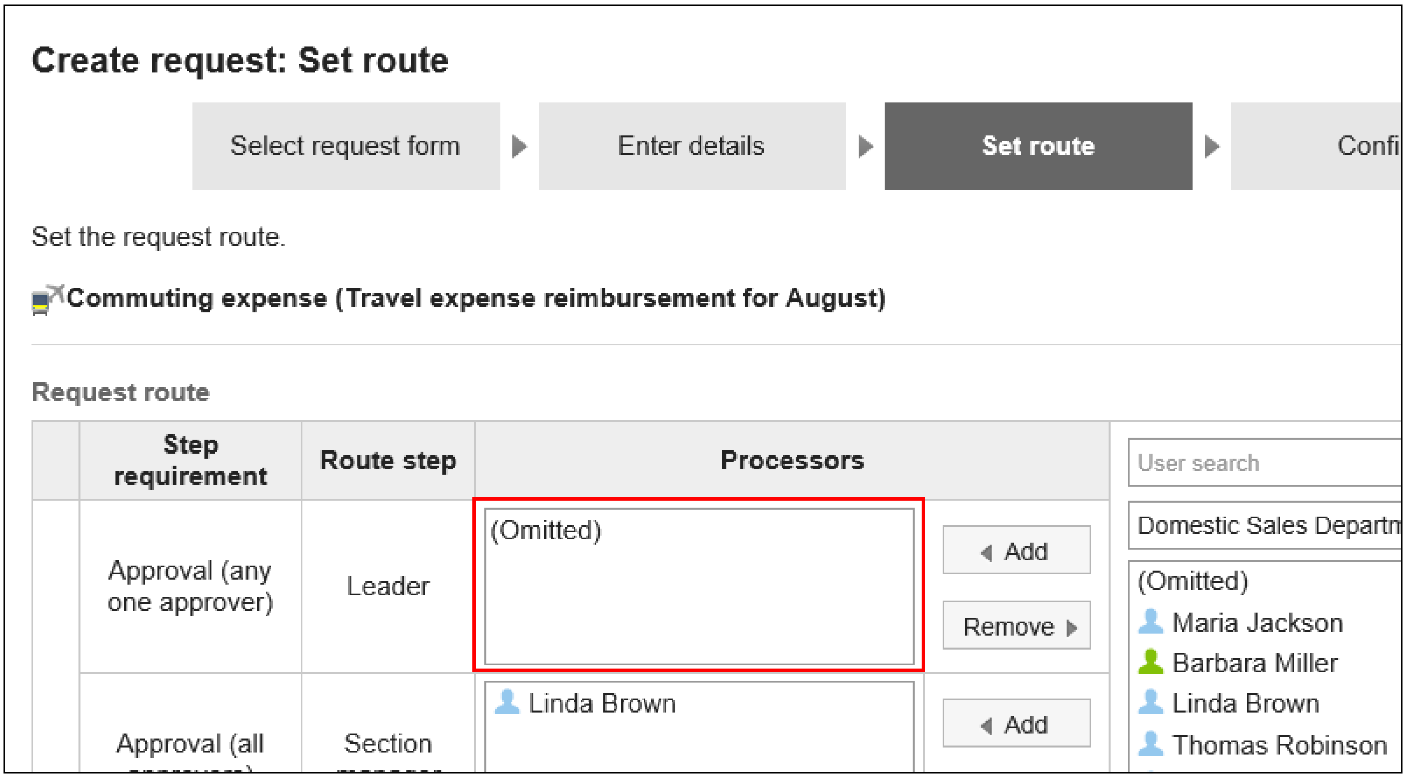
When superior is set, "(Superior)" is displayed after the role name on the "Route details" screen.



Setting Default Value to "(omitted)"

The default value can be set to "(omitted)" For a route step that is expected to have no processors.

A route step with a set of "(omitted)" skips the processing of the request data.



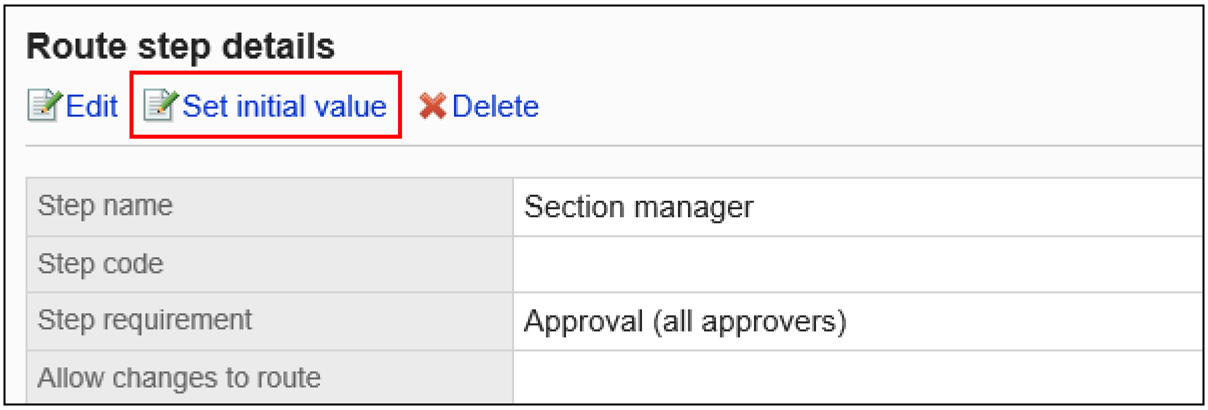
Note

- The final approval route step cannot be omitted. Even if you set the default value to "(omitted)", the "Create request (route)" page does not apply to the user.

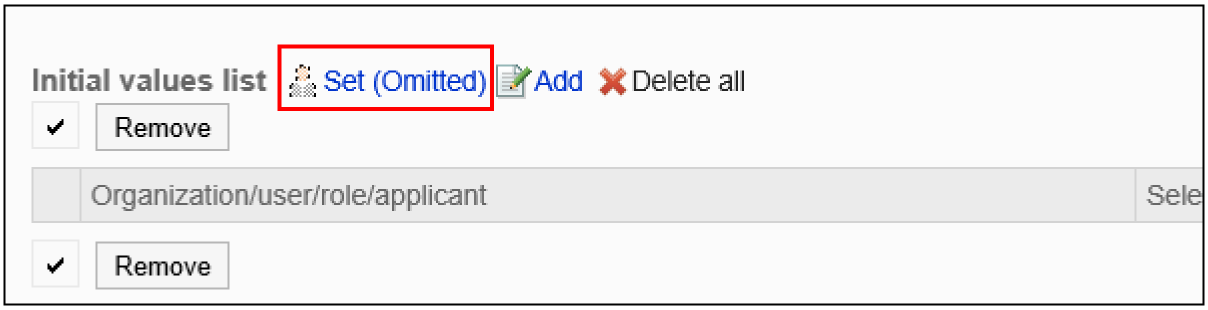
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**
7. **On the route details screen, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "(Omitted)" to set in the default value list.**



10. **Click "Yes" on the "(omitted)" screen.**

    If you have already set the default value for this route step, delete all default values and delete "(omitted)".

Allowing Applicants to Change Default Values

When you create a request data, you can set whether to allow the applicant to change the default value of the route step.

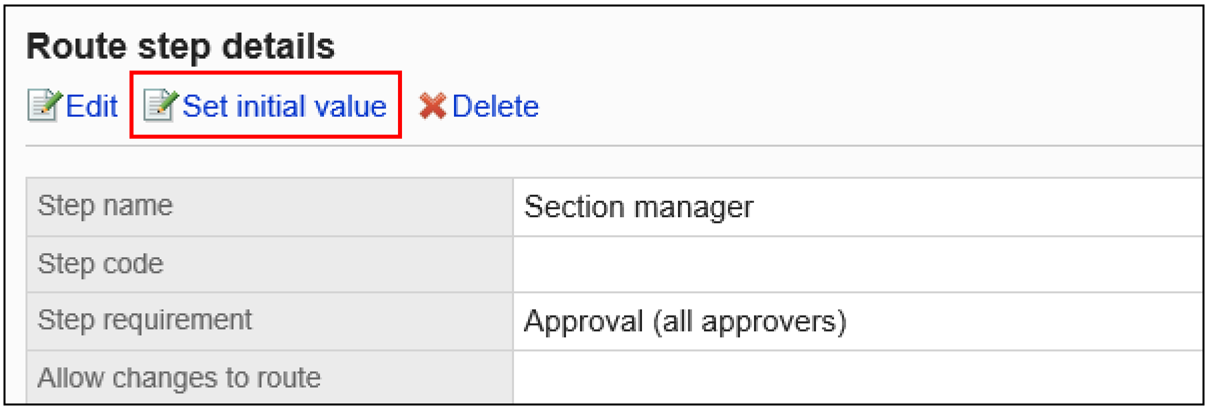
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**

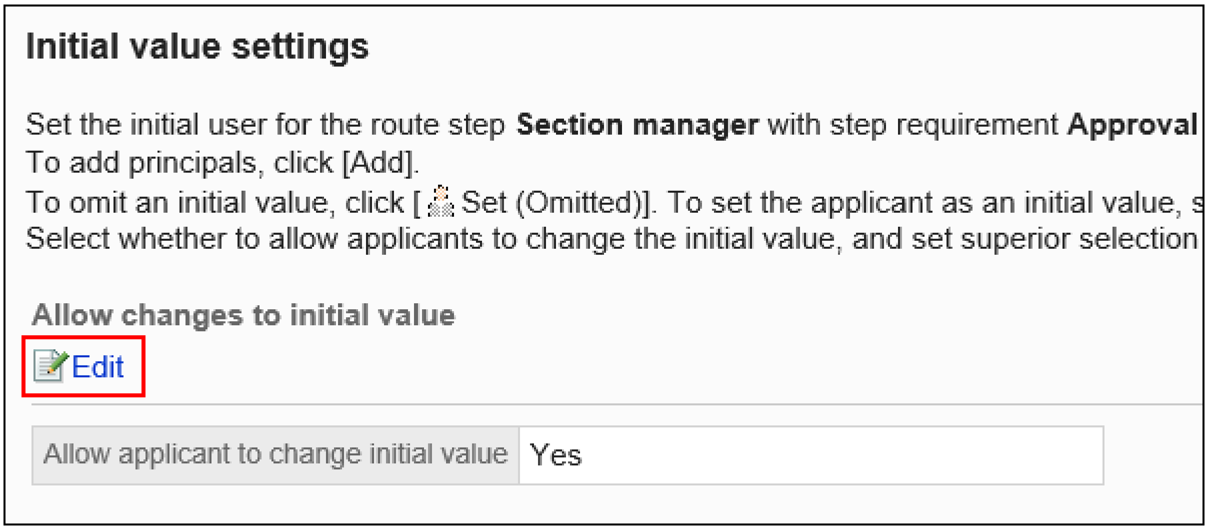
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Save" in the field to allow defaults to change.**



10. **On the "Allow Default change" screen, select the "Allow applicant to change default values" check box.**

Otherwise, clear the check box.

11. **Confirm your settings and click "Save".**

Selecting and Deleting Default Values

Select the default value that is set for the route step and delete it.

Caution

- The deleted default value cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

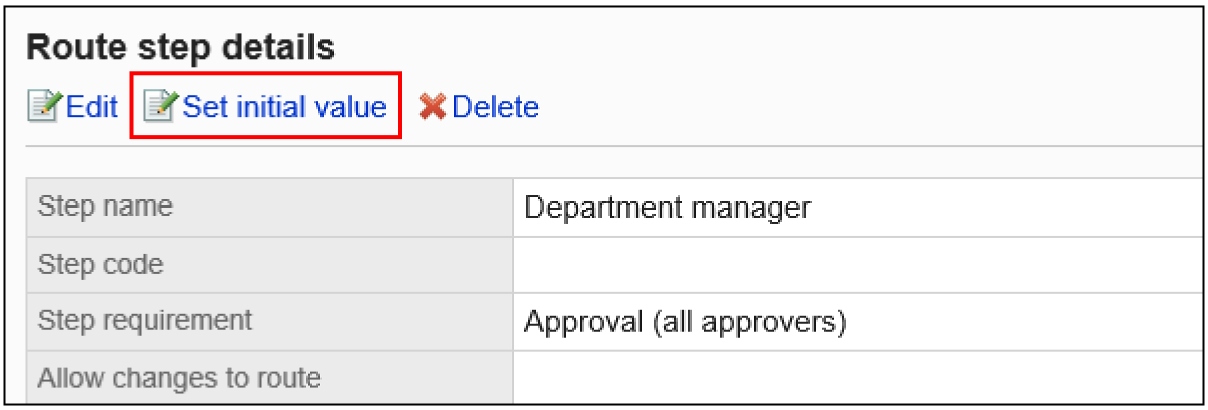
4. **Click "Workflow".**

5. **Click the route list.**

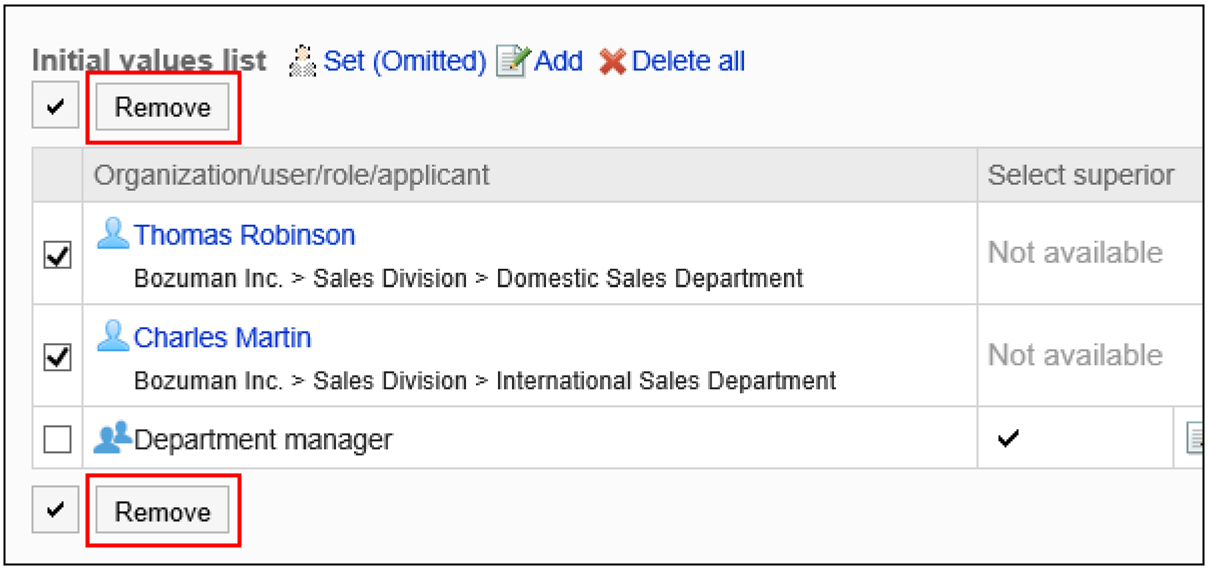
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **In the default value list on the screen to set default settings, select the check box for departments, users, or roles to delete from the default values, and click "Delete".**



10. **Click "Yes" on "Delete default watchers" screen.**

Deleting All Default Values

Delete all default values for the route step.

Caution

- The deleted default value cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

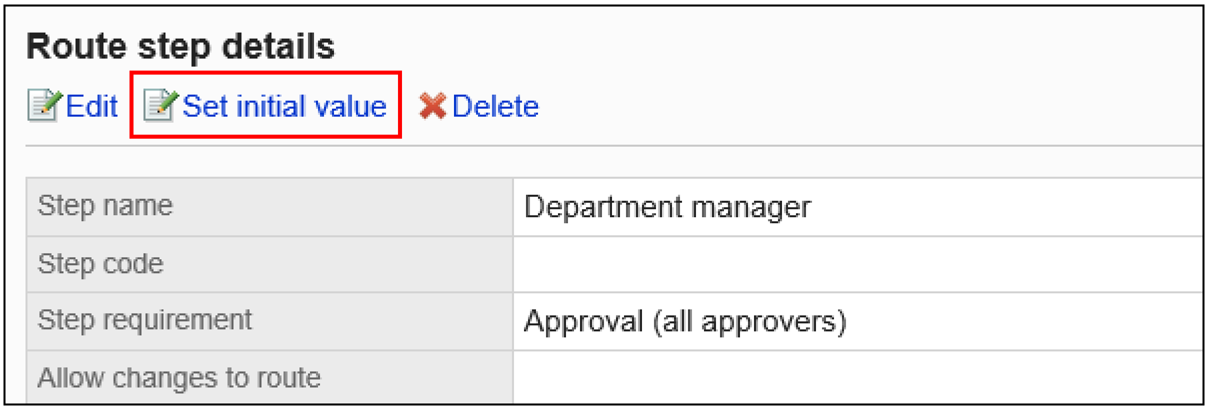
4. **Click "Workflow".**

5. **Click the route list.**

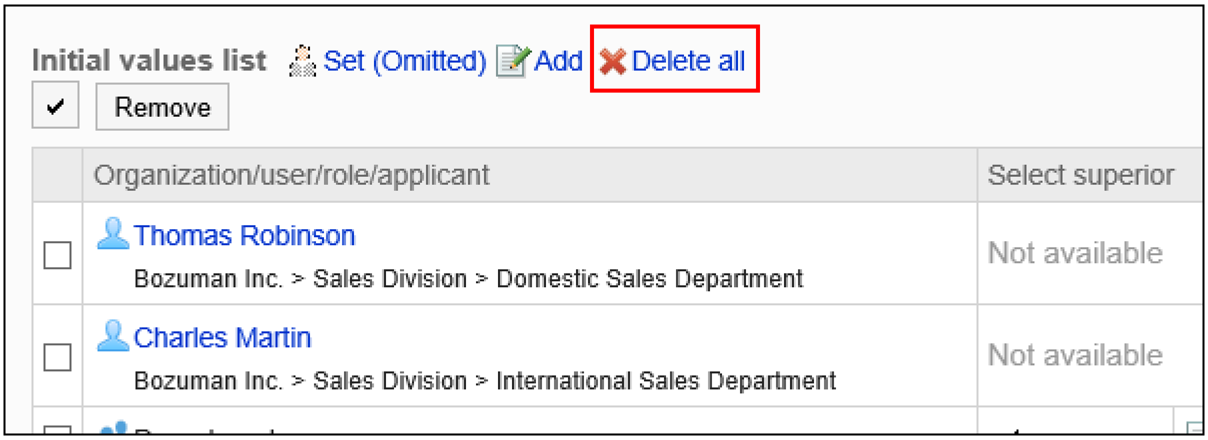
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Delete all" in the default value list.**



10. **Click "Yes" on "Delete all default watchers" screen.**

Changing Route Steps

Change the settings for the route step in the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

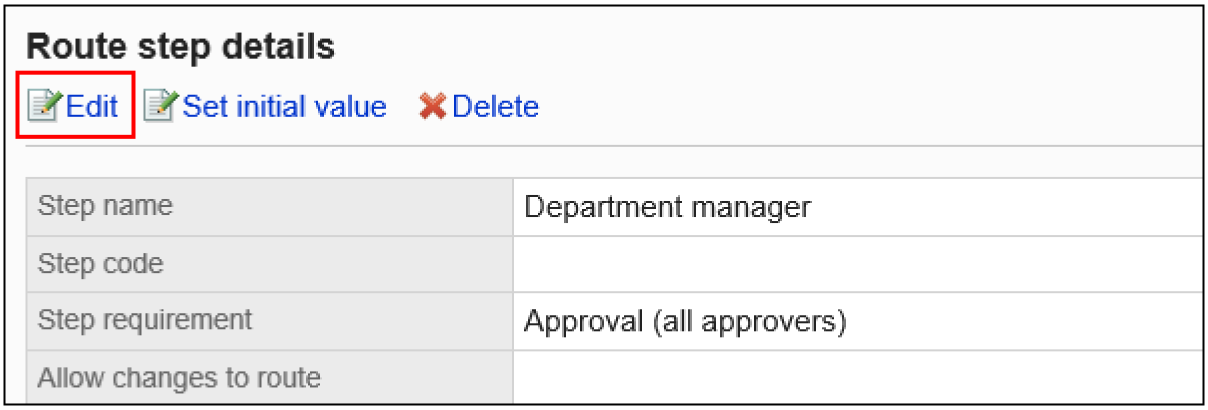
4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step to change in "Approval route".**

8. **On the route step details screen, click "Save".**



9. **On the "Change route step" screen, set the required items.**

For details, refer to settings for route steps in the approval route.

10. **Confirm your settings and click "Save".**

Reorder Route Steps

Reorder Route steps in the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

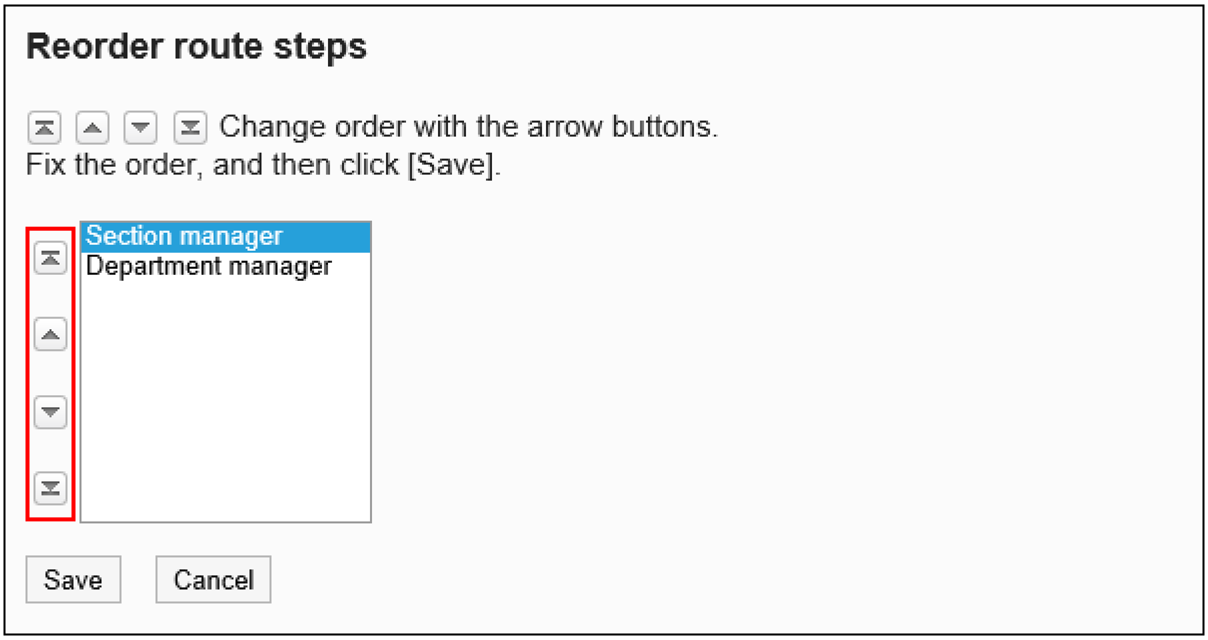
4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click "Reorder" in "Approval route".**

8. **On the Reorder Route steps screen, reorder route steps.**



9. **Confirm your settings and click "Save".**

Deleting Route Steps

Delete the route step for the approval route.

Caution

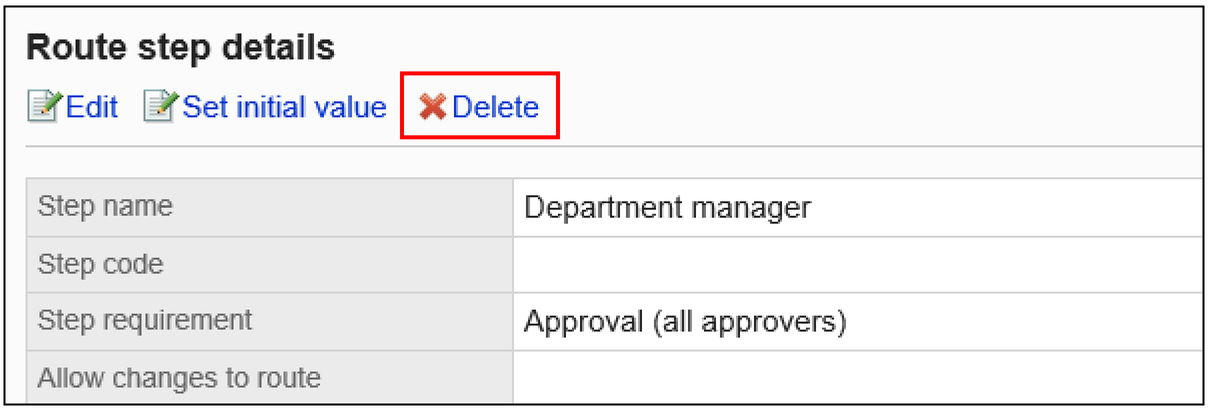
- The deleted route step cannot be restored.

Deleting Route Steps One by One

Delete the route step for the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**
7. **On the route details screen, click the route step name of the route step to delete in "Approval route".**
8. **On the "Route Step Details" screen, click "Delete".**



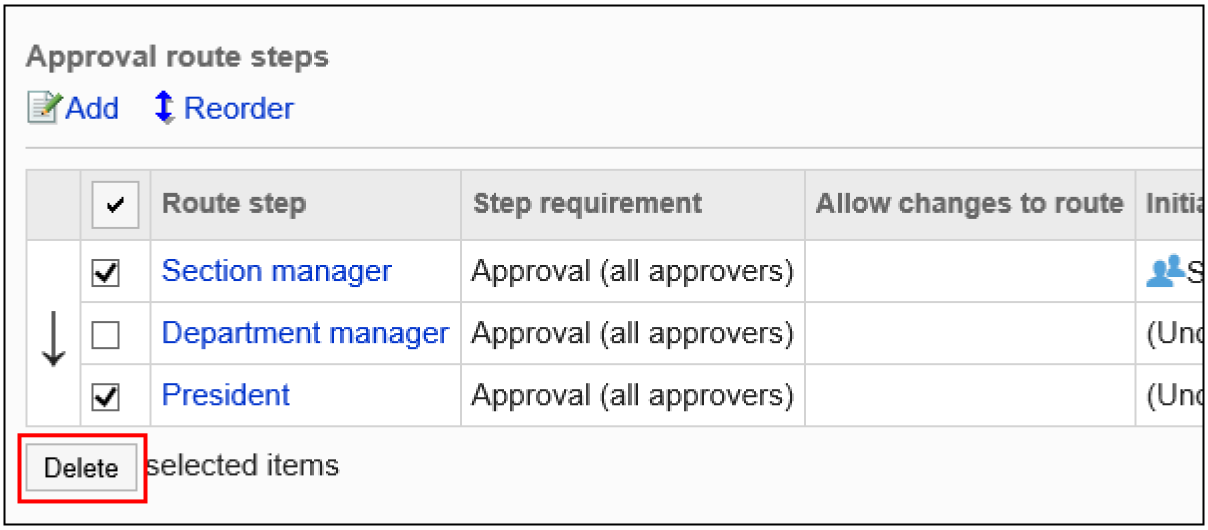
9. **Click "Yes" on the "delete route steps" screen.**

Deleting Multiple Route Steps in Bulk

Select the route step for the approval route you want to delete, and delete it in bulk.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**
7. **On the route details screen, under "Approval route", select the check box for the route step to delete, and then click "Delete".**



8. **Click "Yes" on the "delete route steps" screen.**

2.13.4.5. Setting up Acknowledgement Routes (Shared Routes)

Set up a route step for routing a request. Multiple route steps can be set.

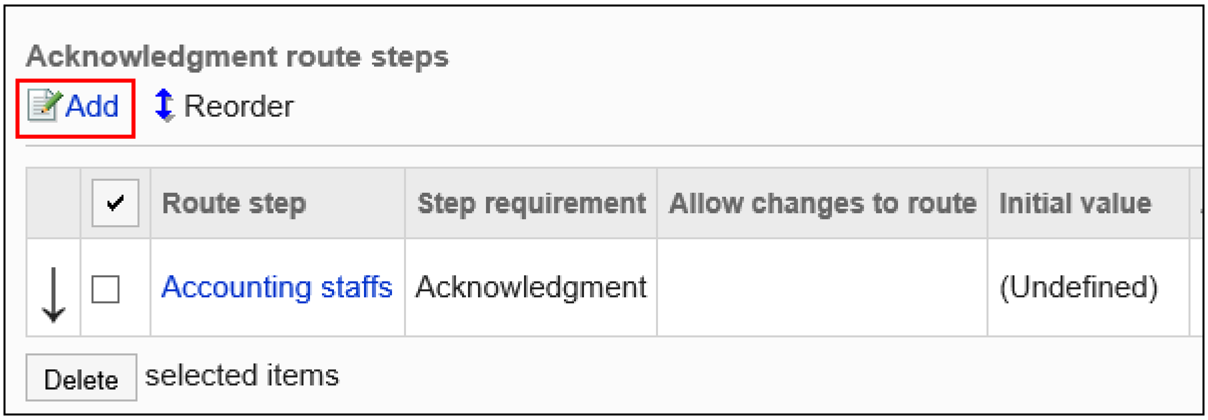
You can also set up the circulars for each route step.

Adding Route Steps

Add a route step for the routing route.

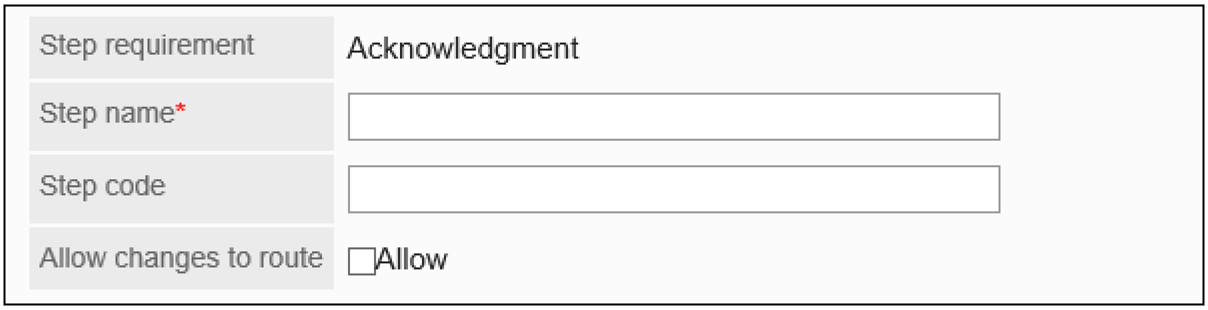
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**
7. **On the route details screen, click "Add" in "Acknowledgement route" field.**



8. **On the "Add route Step" screen, set the required items.**
9. **Confirm your settings and click "Add".**

Setting Items of Route Steps for Acknowledgement Routes

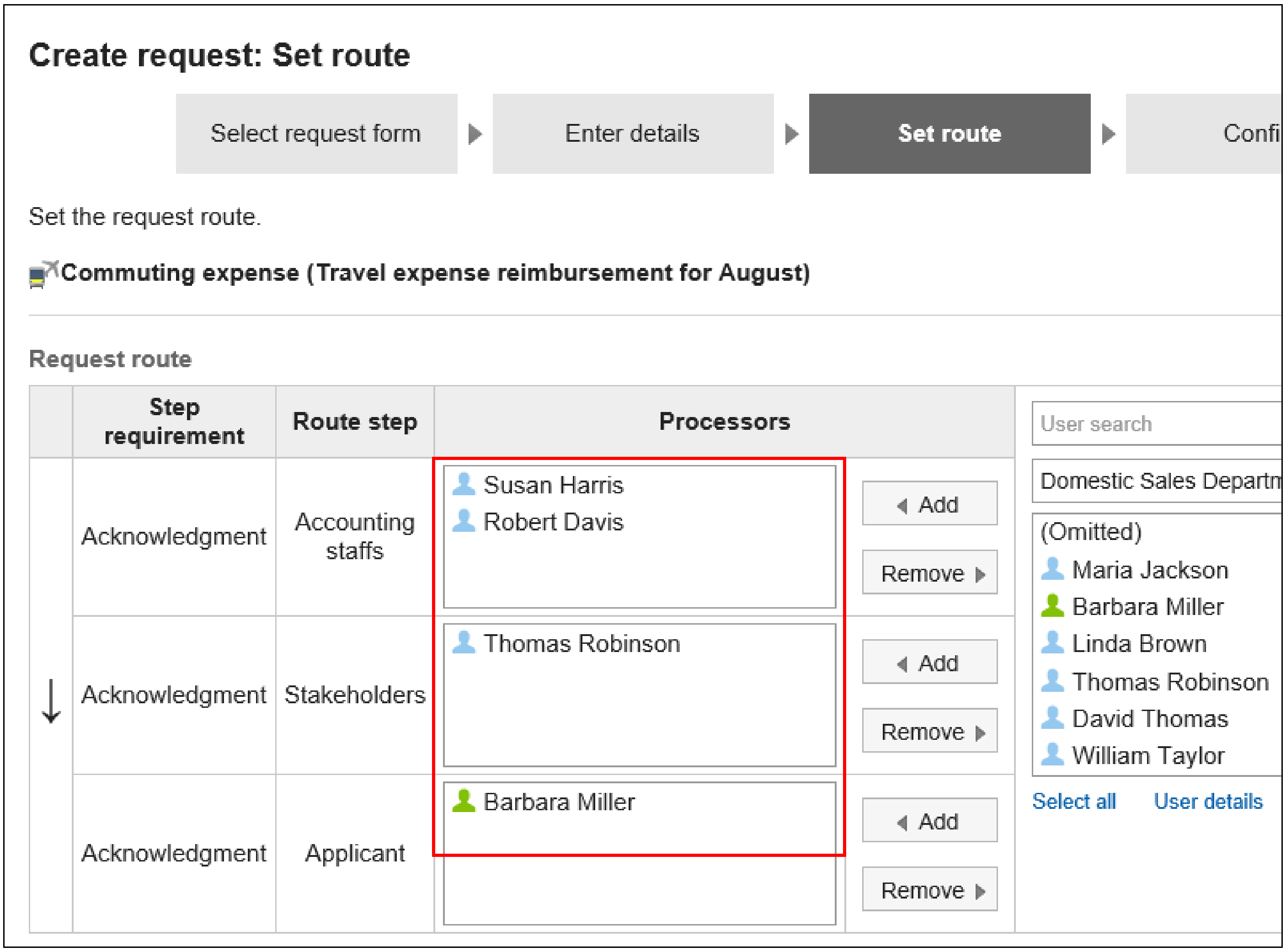


Item	Description
Route Step Name	Enter the route step name.
Step code	An item code is a unique code to identify items for JavaScript customization. If you do not use the JavaScript customization, you do not need to set the route step code. You can use single-byte alphanumeric characters, hyphens, and _ (underscores). When a step code is duplicated in one request form, an error occurs. Up to 100 characters can be entered in a code. If 101 or more characters are entered, the first 100 characters are registered.
Allow Route change	To allow a processor to reroute, select the "Allow" check box. If a route change is allowed, the processor can be changed by other processors in the same route step and in the subsequent route step, when processors are processed in this route step.

Setting Default Values for Route Steps

Setting the default value for the route step simplifies the job of the applicant.

Organization, user, or role.



Adding Default Values

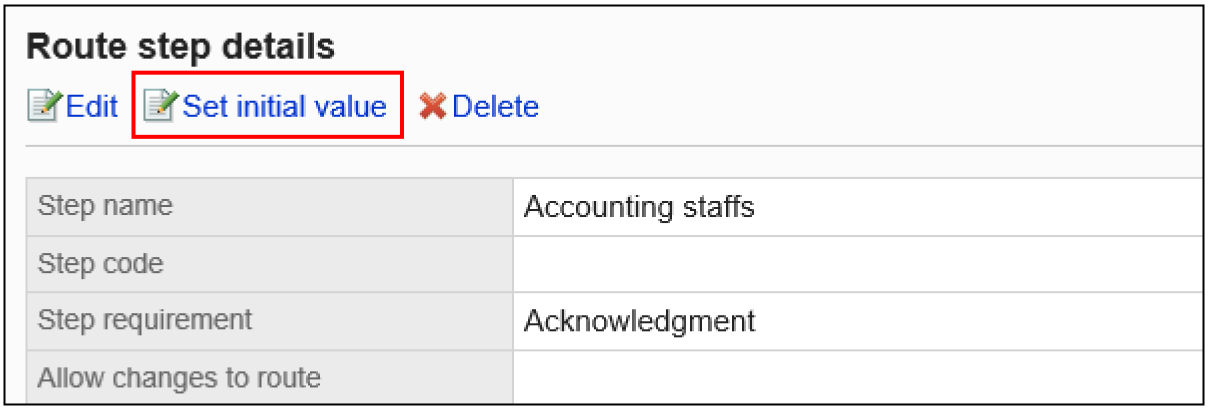
Adds the default value for the route step.

Steps:

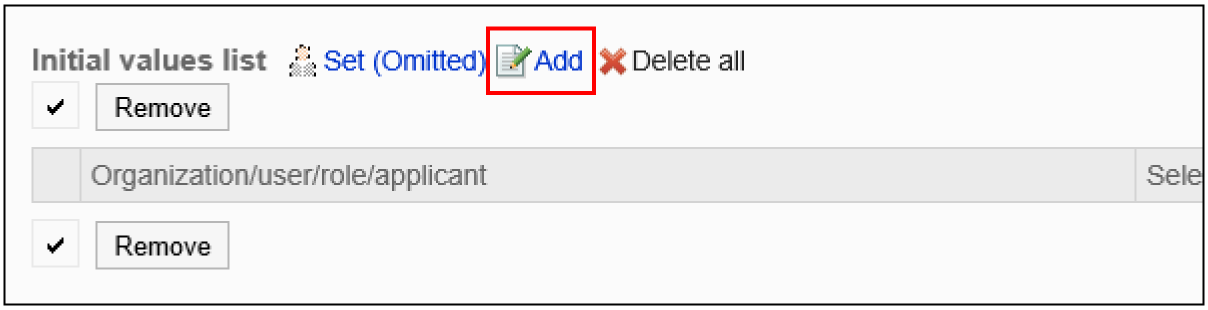
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Acknowledgement route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Add" in the default value list.**

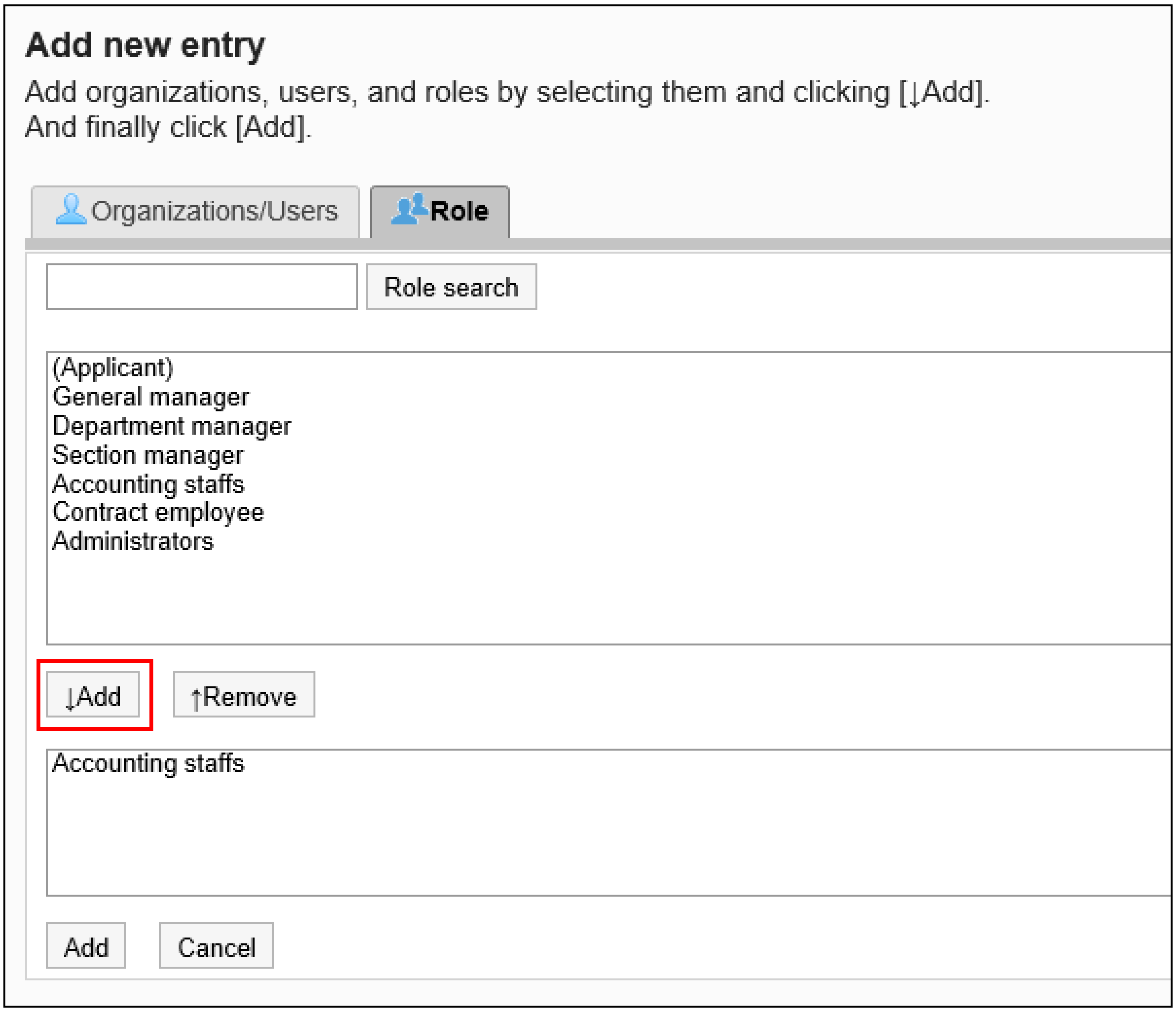


10. **On "Add default watchers" screen, select the organization, user, or role, and then click "Add".**

If you want to set the applicant as default, select "(Applicant)" from the role.

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



11. Confirm your settings and click "Add".

Setting Default Superior

When you add roles to the initial value of a route step, users who have the roles that you have set can display only the superior of the applicant when the user requests.
Superior is displayed as a "priority organization" of the applicant, or a user who belongs to the organization.

Users Shown as Superiors

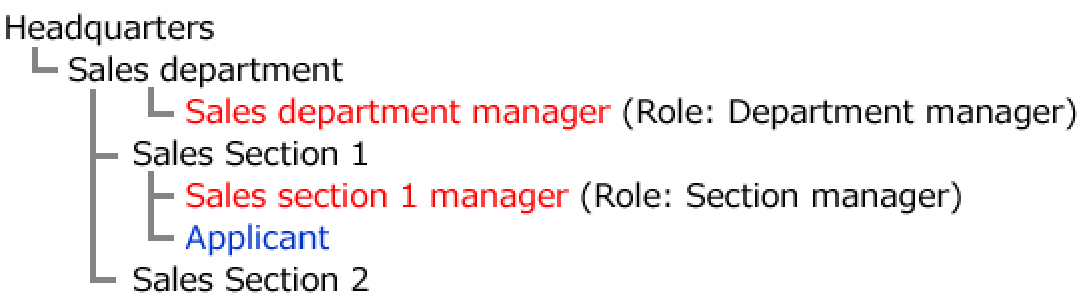
If you have configured the superiors for the default value of a route step, the users shown as the superiors in the processor field are determined by the following conditions.

1. A user who belongs to the "priority organization" of the applicant and who has the specified role
2. A user who is a member of the organization that is higher in the "priority organization" of the applicant and who has the specified role

If there are any users who match condition 1, those users are displayed as the superiors in the processor field.
If there are no users who match the condition 1, users meeting condition 2 are displayed as the superiors in the processor field.

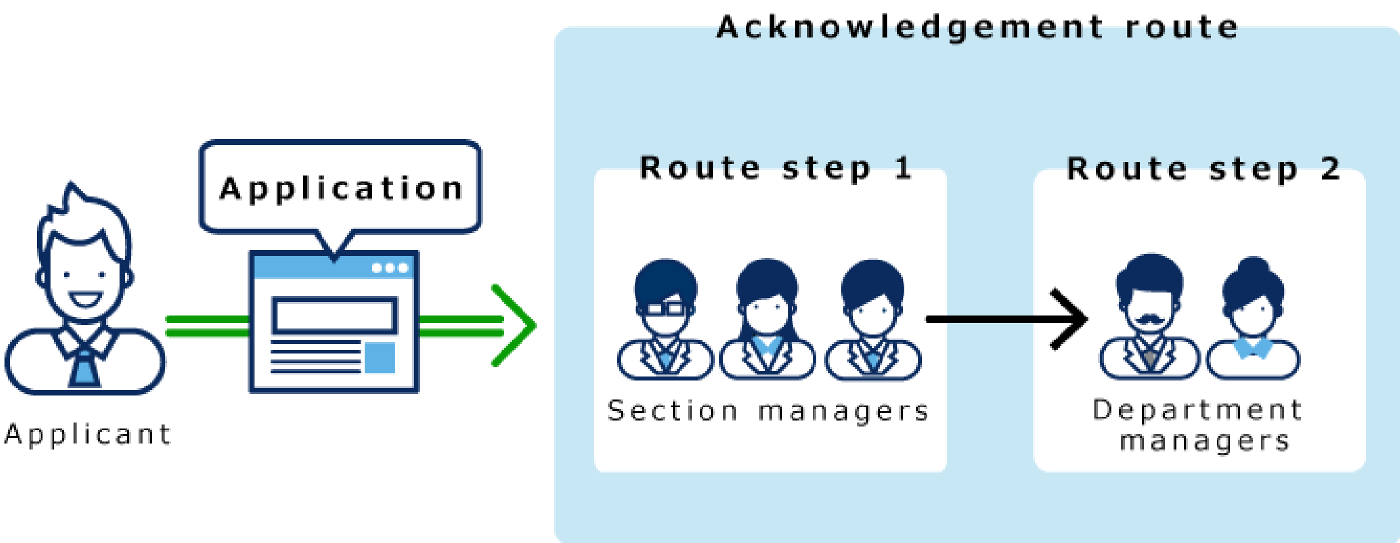
Image of Usage

This section describes how to create a request data for a user who is a member of the sales department.
The priority organizations of the applicants are the sales department.
The above-said applicant is the director of Sales department and one division manager. The Sales department manager has the role "manager" and the "Manager" section.



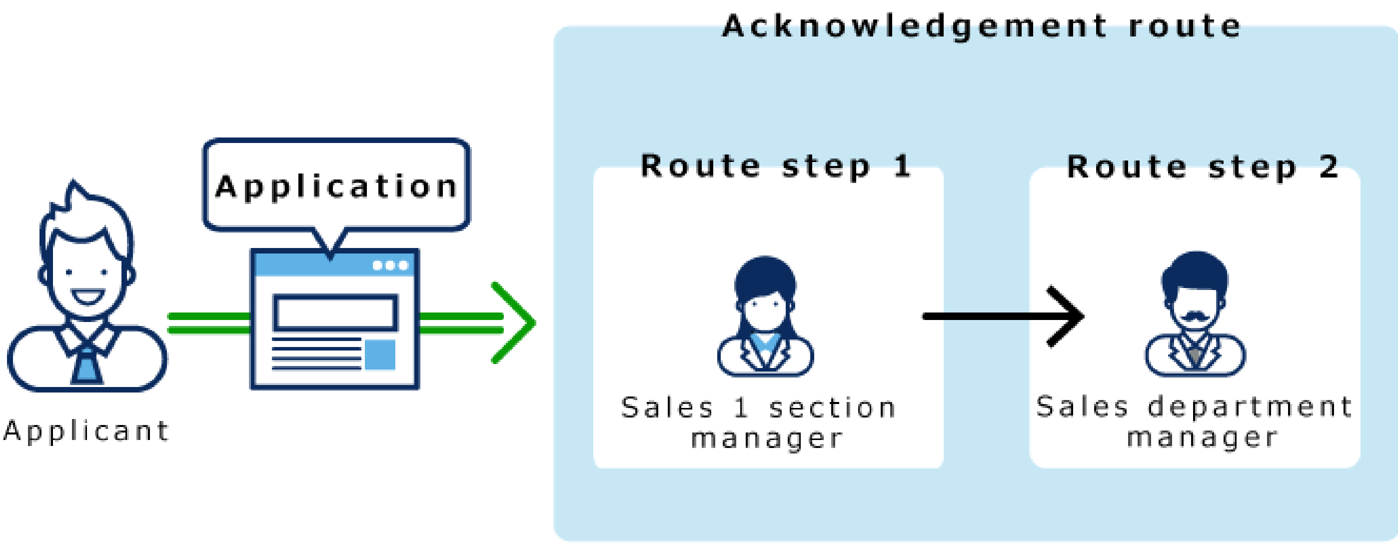
When you set the role of "manager" in the initial value of the route step 1 and the "manager" for the initial value of the route step 2, when you create the request data, all users belonging to each role will be set as processors.
The applicant must select his or her top length from among the processors.

Before superior:



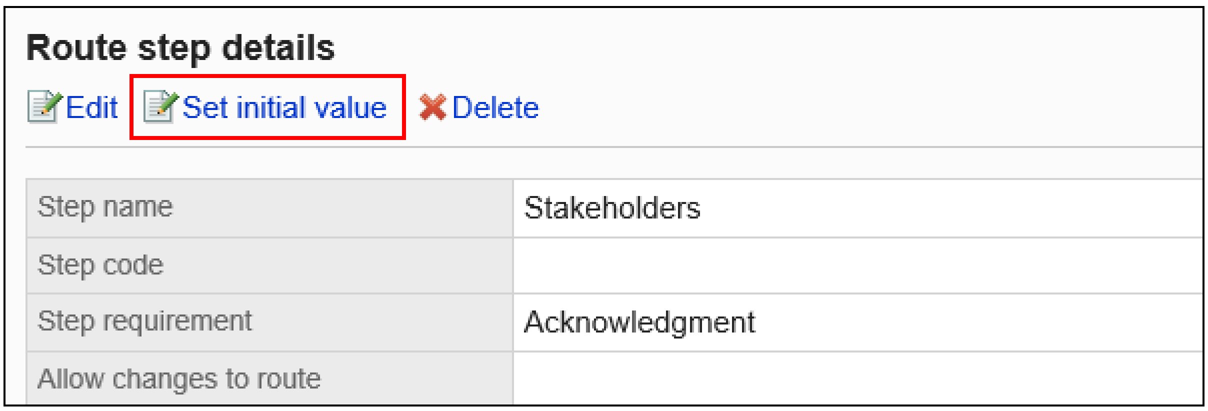
If you set superior in Route Step 1 and Step 2, only your superior is automatically set for the processor of each route step.

After setting superior:

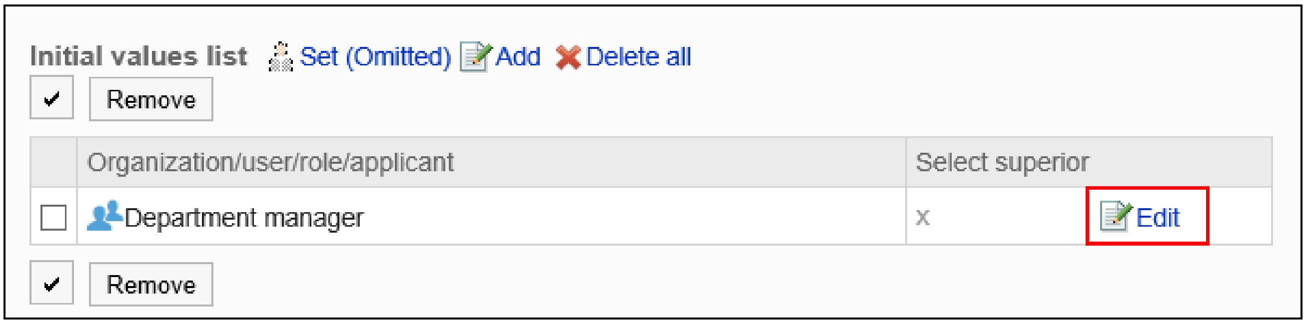


Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**
7. **On the route details screen, click the route step name of the route step in "Acknowledgement route" field.**
8. **On the "Route Step Details" screen, click "Set Default".**



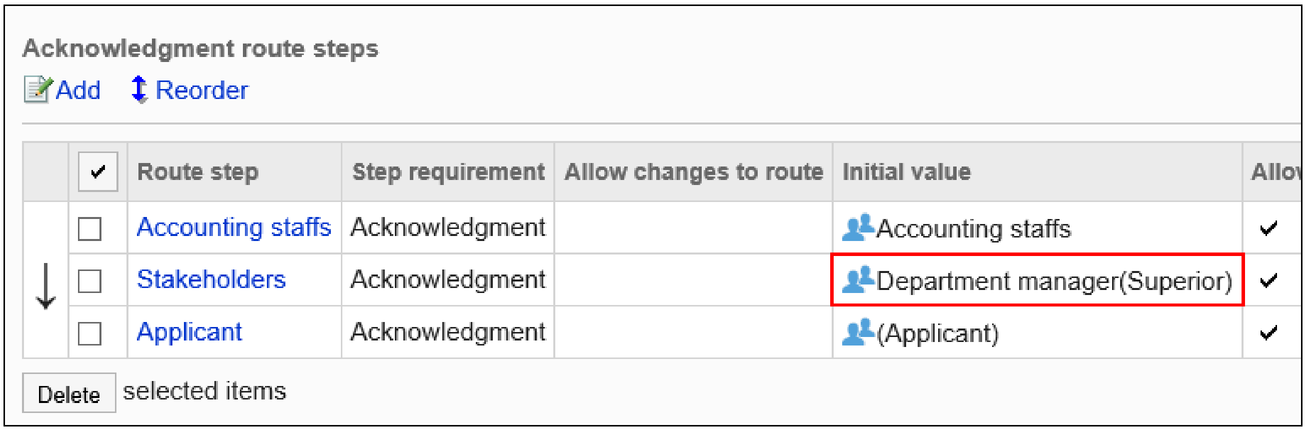
9. **On the screen to set default settings, click "Change" in the default value list for the role to set a superior.**



10. **On the "Change superior selection" screen, select the "Select the" check box.**

11. **Confirm your settings and click "Save".**

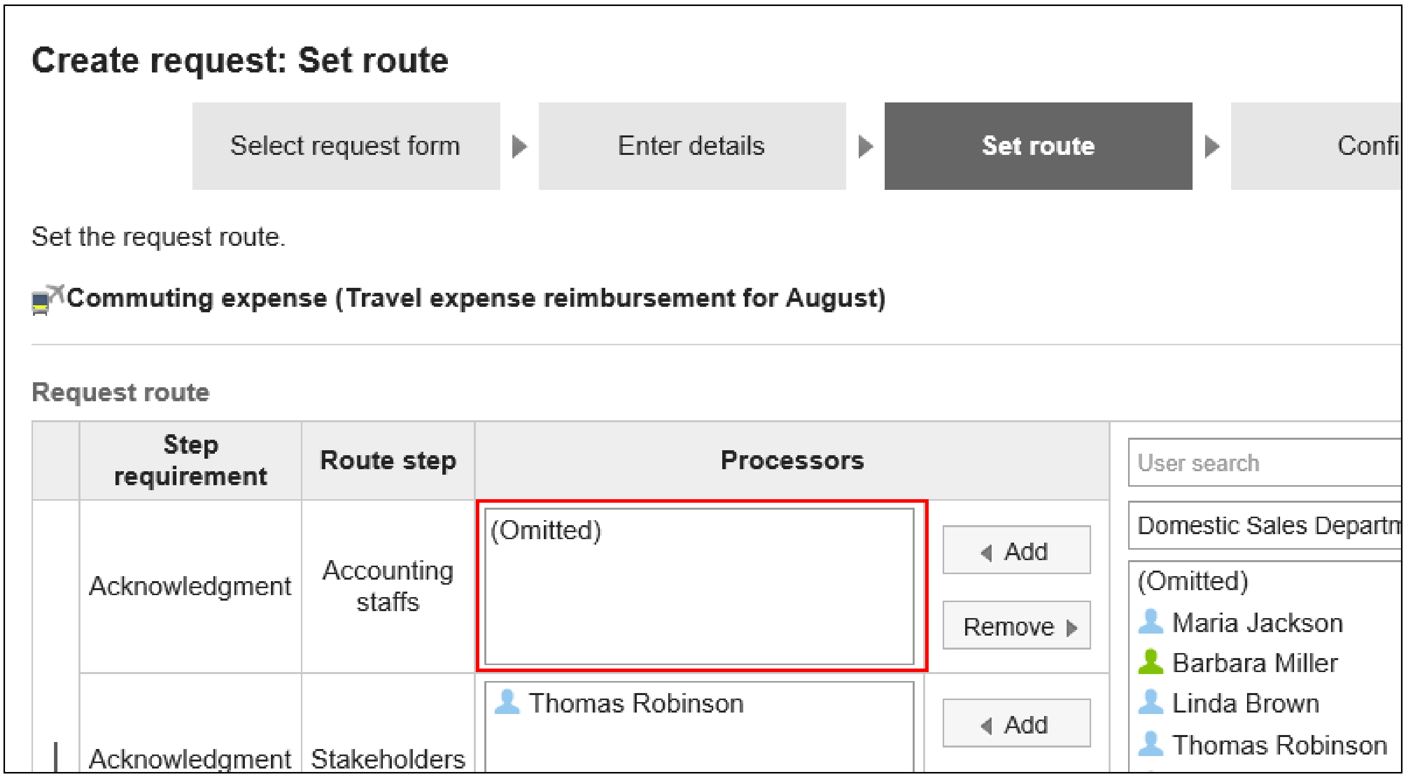
When superior is set, "(Superior)" is displayed after the role name on the "Route details" screen.



Setting Default Value to "(omitted)"

The default value can be set to "(omitted)" For a route step that is expected to have no processors.

A route step with a set of "(omitted)" skips the processing of the request data.



Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

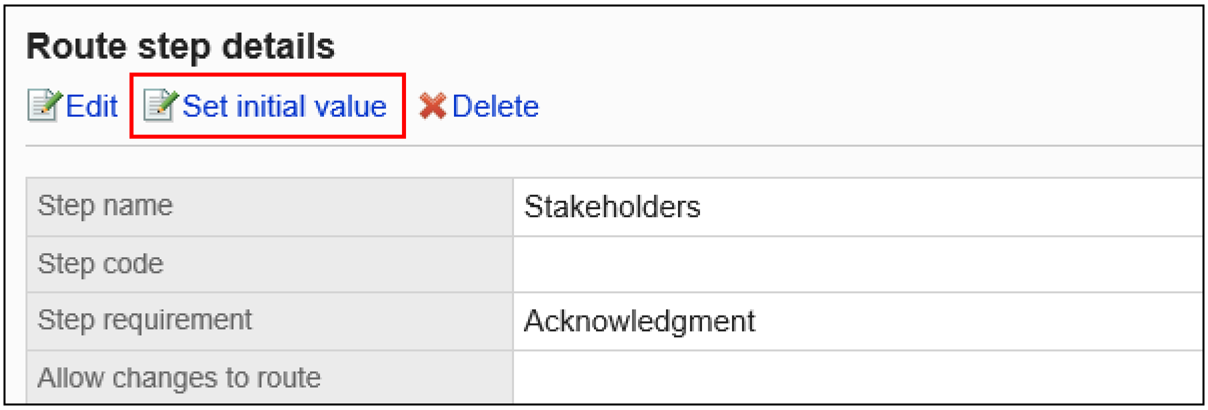
4. **Click "Workflow".**

5. **Click the route list.**

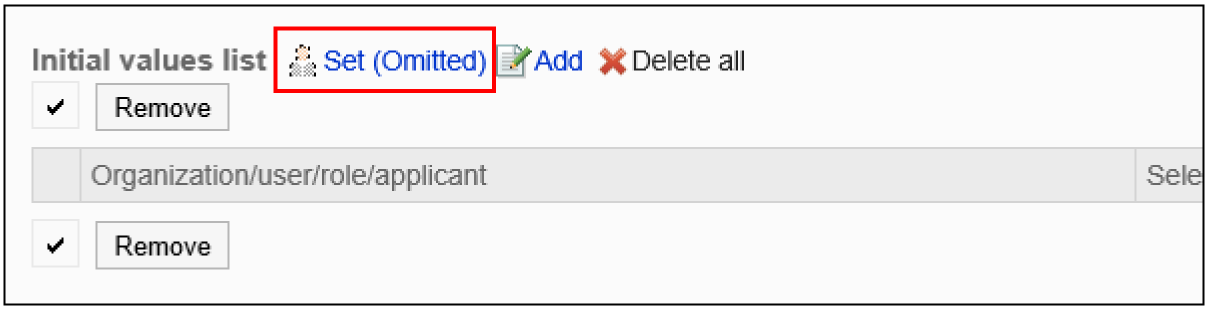
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Acknowledgement route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. On the screen to set default settings, click "(Omitted)" to set in the default value list.



10. Click "Yes" on the "(omitted)" screen.

If you have already set the default value for this route step, delete all default values and delete "(omitted)".

Allowing Applicants to Change Default Values

When you create a request data, you can set whether to allow the applicant to change the default value of the route step.

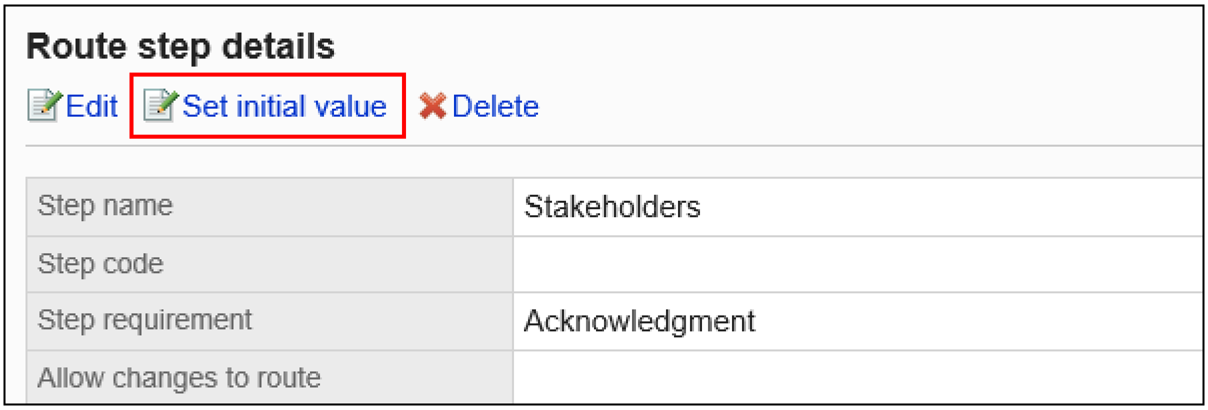
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**

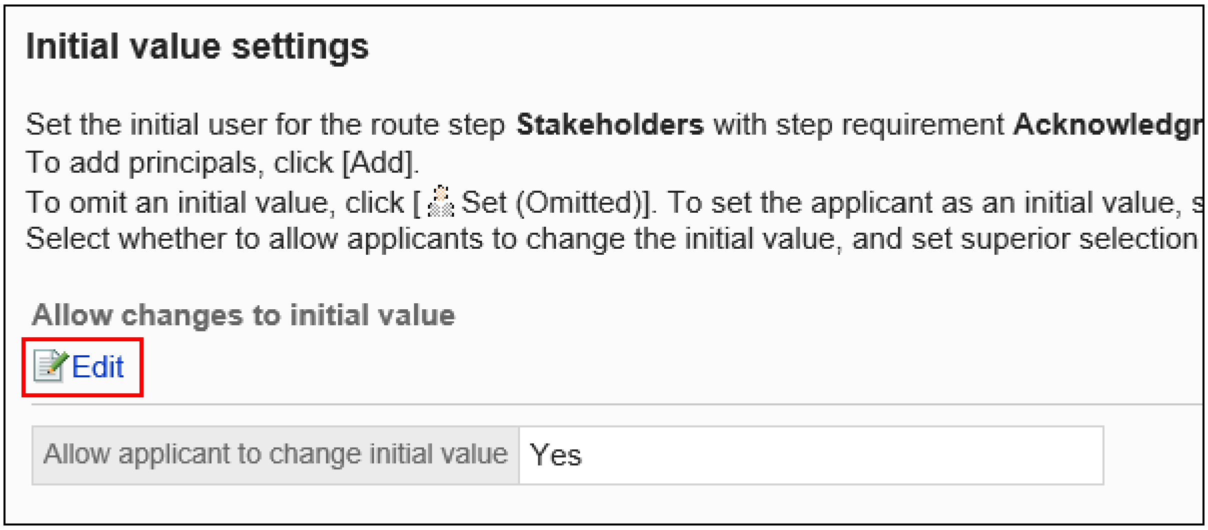
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Acknowledgement route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Save" in the field to allow defaults to change.**



10. **On the "Allow Default change" screen, select the "Allow applicant to change default values" check box.**

Otherwise, clear the check box.

11. Confirm your settings and click "Save".

Selecting and Deleting Default Values

Select the default value that is set for the route step and delete it.

Caution

- The deleted default value cannot be restored.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

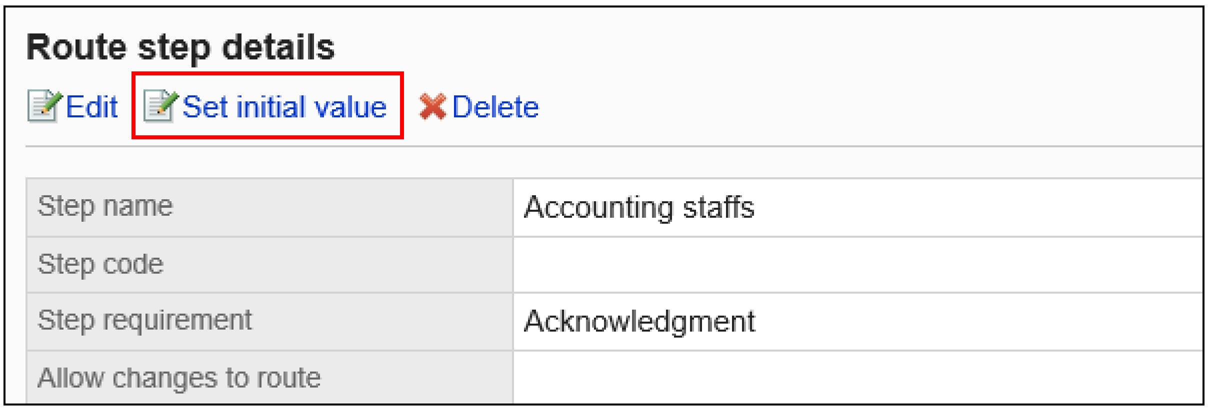
4. Click "Workflow".

5. Click the route list.

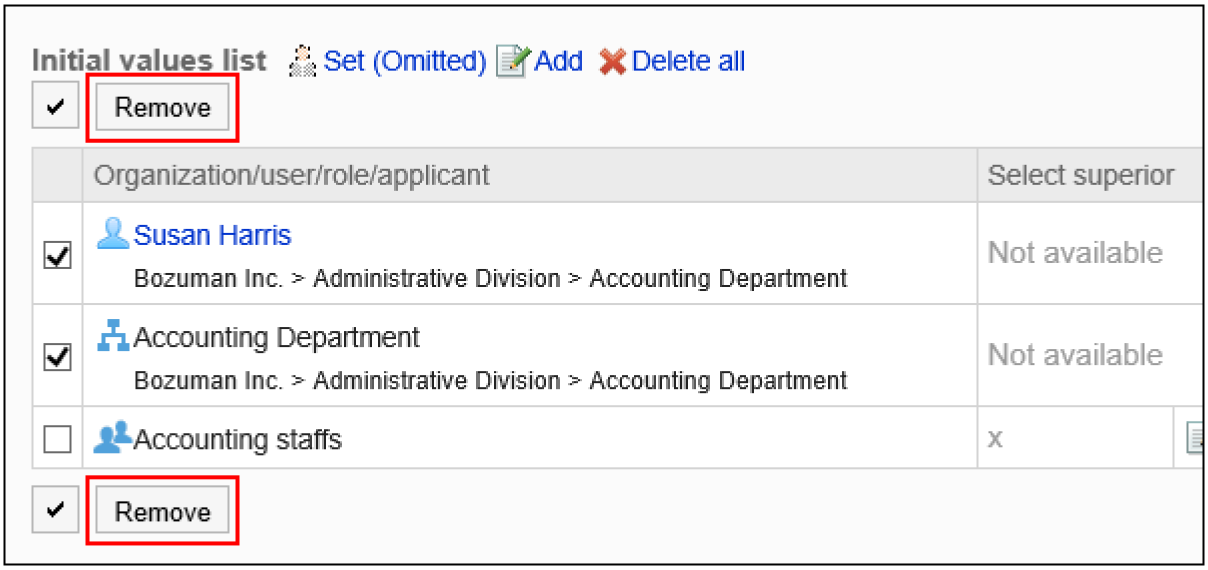
6. On the route list screen, select the shared routes tab, and click the route name of the shared route.

7. On the route details screen, click the route step name of the route step in "Acknowledgement route" field.

8. On the "Route Step Details" screen, click "Set Default".



9. **In the default value list on the screen to set default settings, select the check box for departments, users, or roles to delete from the default values, and click "Delete".**



10. **Click "Yes" on "Delete default watchers" screen.**

Deleting All Default Values

Delete all default values for the route step.

Caution

- The deleted default value cannot be restored.

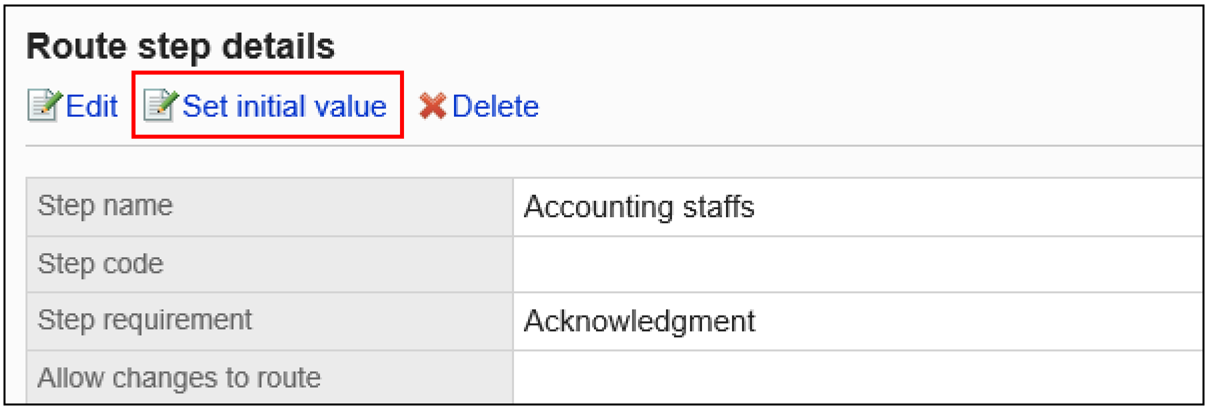
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**

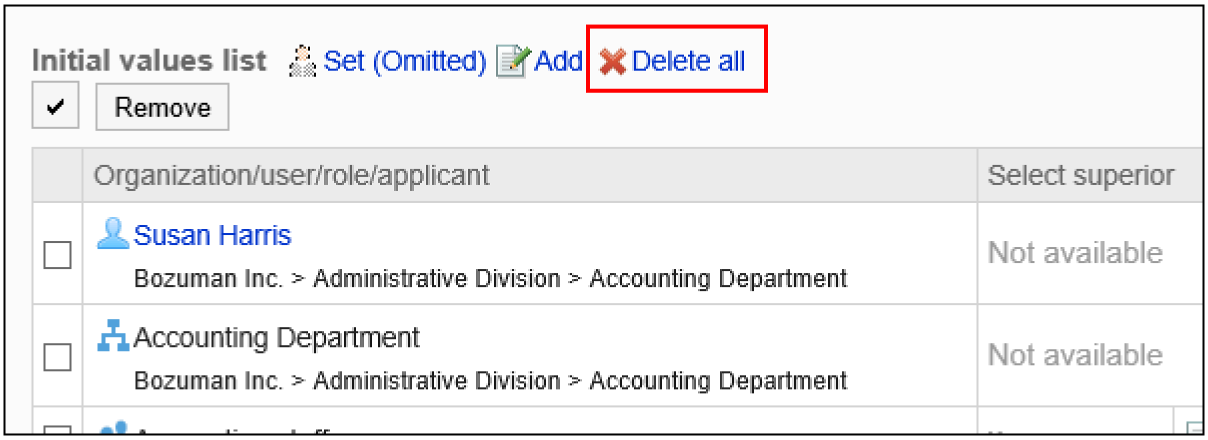
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click the route step name of the route step in "Acknowledgement route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Delete all" in the default value list.**



10. **Click "Yes" on "Delete all default watchers" screen.**

Changing Route Steps

Change the route step settings for the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

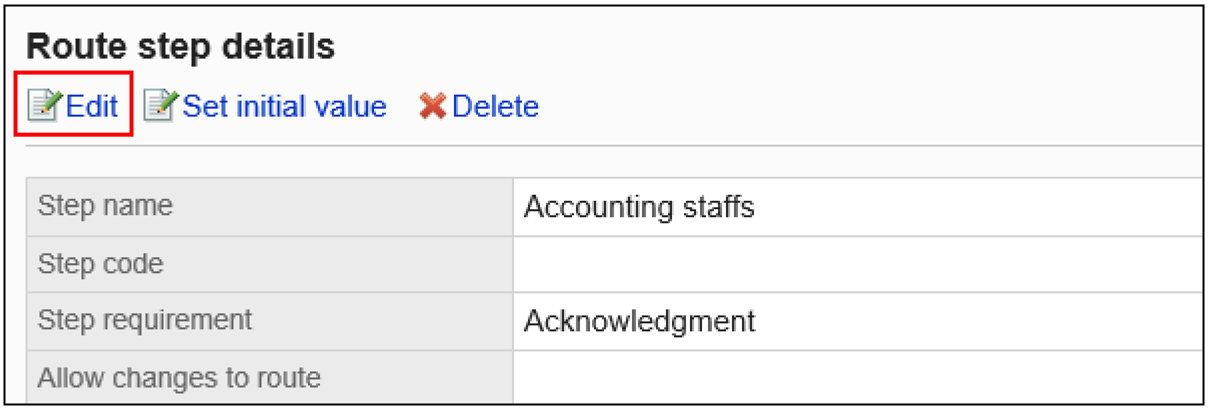
4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the "Route Details" screen, click the route step name of the route step you want to change in the "Route" field.**

8. **On the route step details screen, click "Save".**



9. **On the "Change route step" screen, set the required items.**

   For details, refer to route step settings in the routing route.

10. **Confirm your settings and click "Save".**

Reorder Route Steps

Reorder route steps in the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

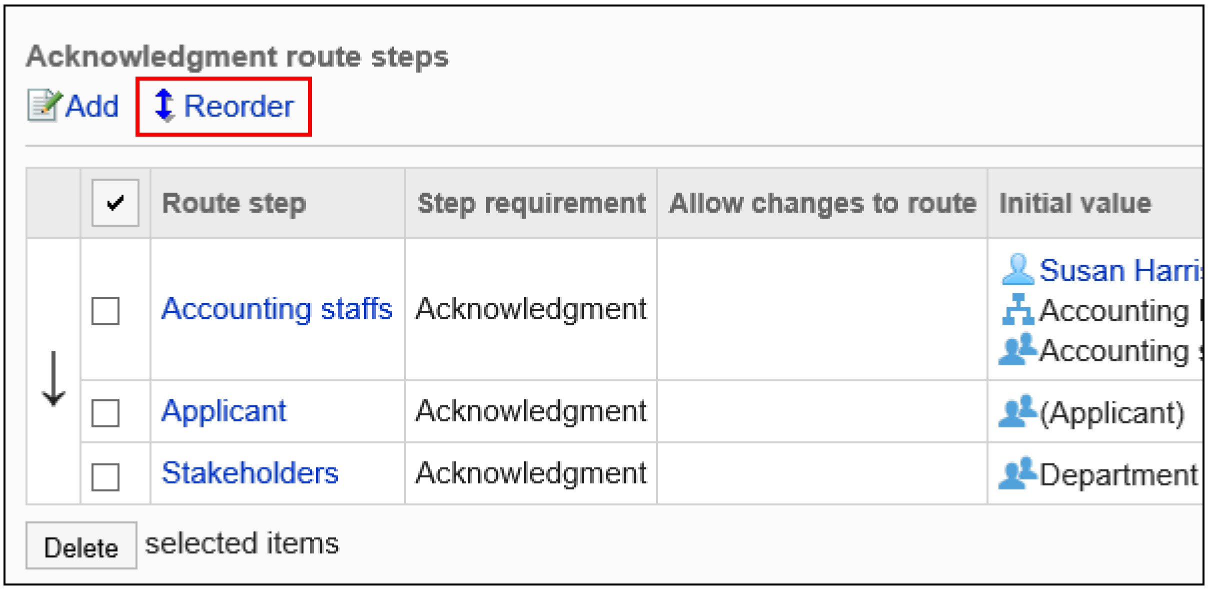
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

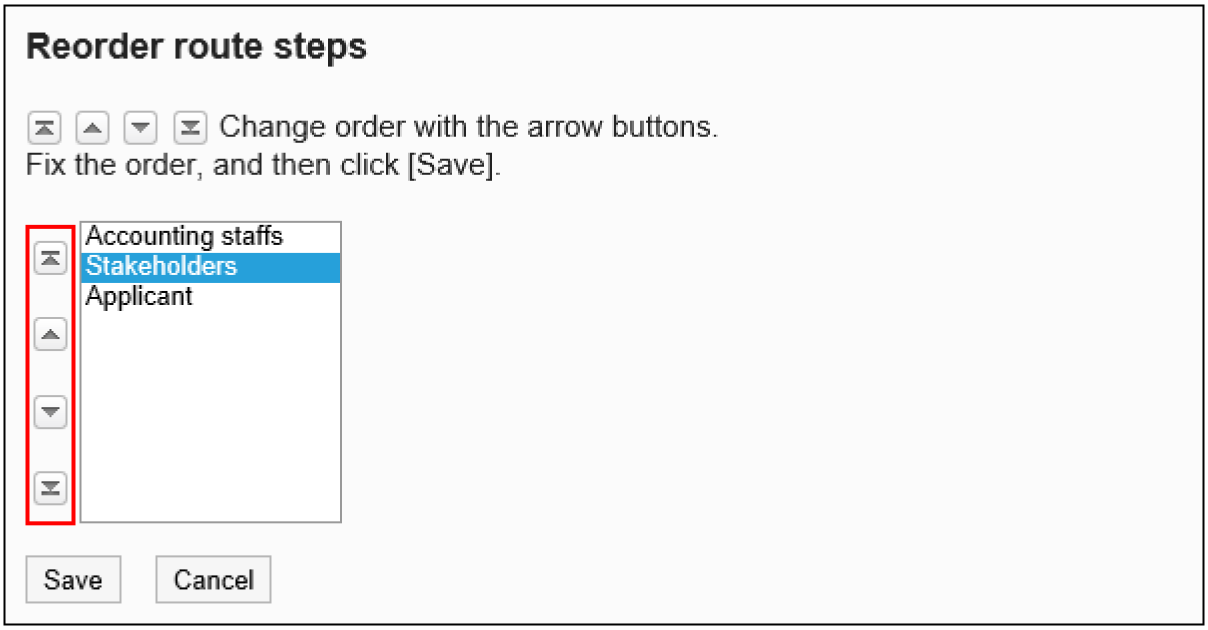
5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, click "Reorder" in "Acknowledgement route" field.**



8. **On the Reorder Route steps screen, reorder route steps.**



9. **Confirm your settings and click "Save".**

Deleting Route Steps

Delete the route step for the routing route.

Caution

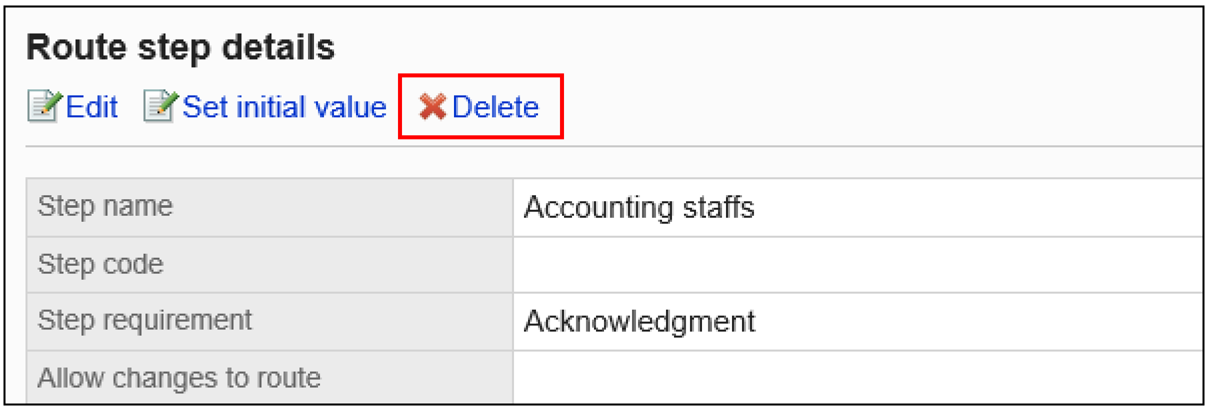
- The deleted route step cannot be restored.

Deleting Route Steps One by One

Delete the route step for the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**
7. **On the route details screen, click the route step name of the route step to delete in "Acknowledgement route" field.**
8. **On the "Route Step Details" screen, click "Delete".**



9. **Click "Yes" on the "delete route steps" screen.**

Deleting Multiple Route Steps in Bulk

Select the route step for the routing route you want to delete, and delete it in bulk.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and click the route name of the shared route.**

7. **On the route details screen, under "Acknowledgement route", select the check box for the route step to delete, and then click "Delete".**

8. **Click "Yes" on the "delete route steps" screen.**

2.13.4.6. Deleting Shared Routes and Dividers

Delete shared routes or separator lines in the route list.

Caution

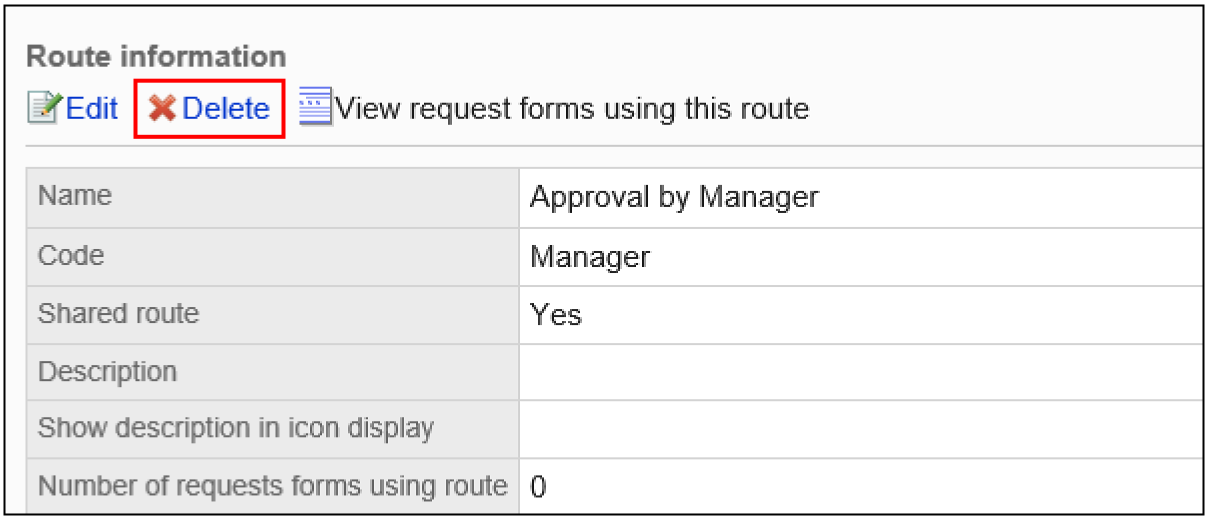
- Deleted shared routes cannot be restored.
- If you delete a shared route, the route setting of the request form using the shared route is also deleted. You cannot use a request form that has no route. Confirm that the operation is not operational and that the shared route must be deleted.
  We recommend that you reference a request form that uses a shared route(1314Page) before you can delete it.

Deleting Shared Routes One by One

Delete a shared route.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and then click the route name of the shared route to delete.**
7. **On the route details screen, click "Delete" in route information.**



8. **Click "Yes" on the "delete shared route" screen.**

Delete Multiple Shared Routes and Dividers

Select the shared route and the separator line you want to delete, and delete it all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

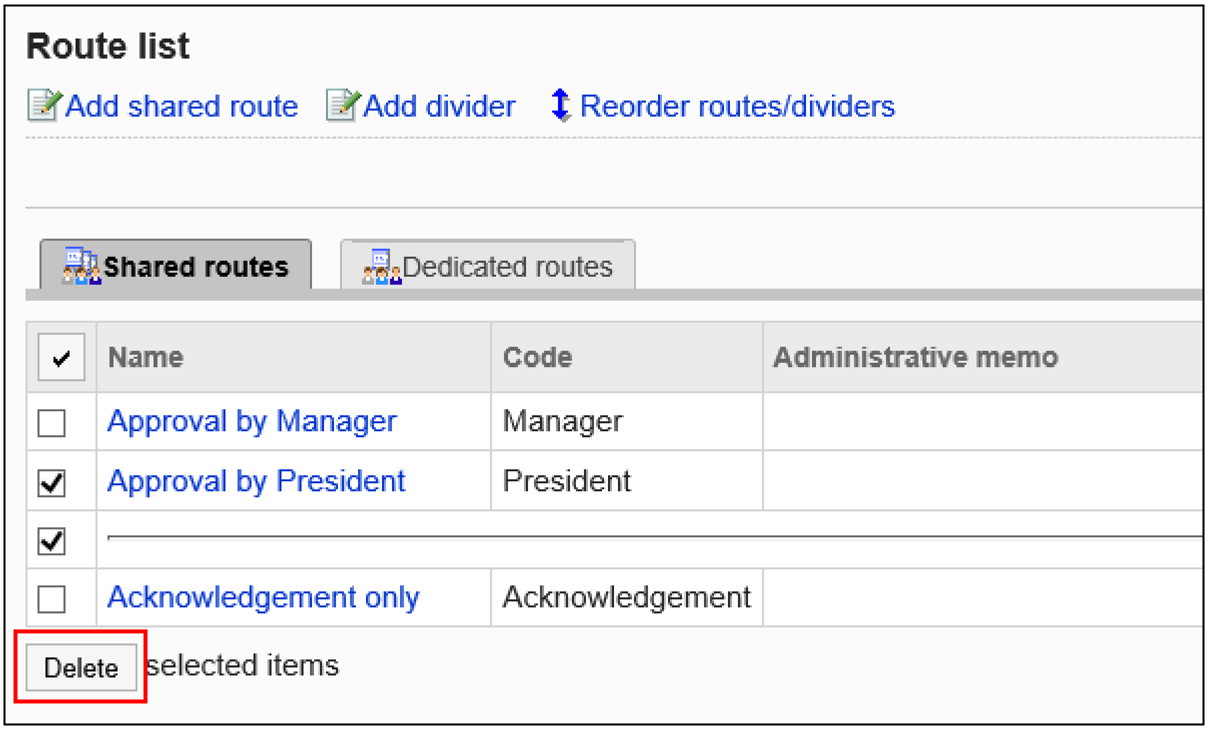
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the shared routes tab.**

7. **Select the check boxes of the shared routes and separators you want to delete, and then click "Delete".**



8. **Click "Yes" on the "delete shared routes" screen.**

2.13.4.7. Settings in Shared Routes List

In the list of shared routes, you can add a separator line to organize the view of the list, or reorder the route.

Adding Dividers to Shared Route List

Adds a separator line to the list of shared routes.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

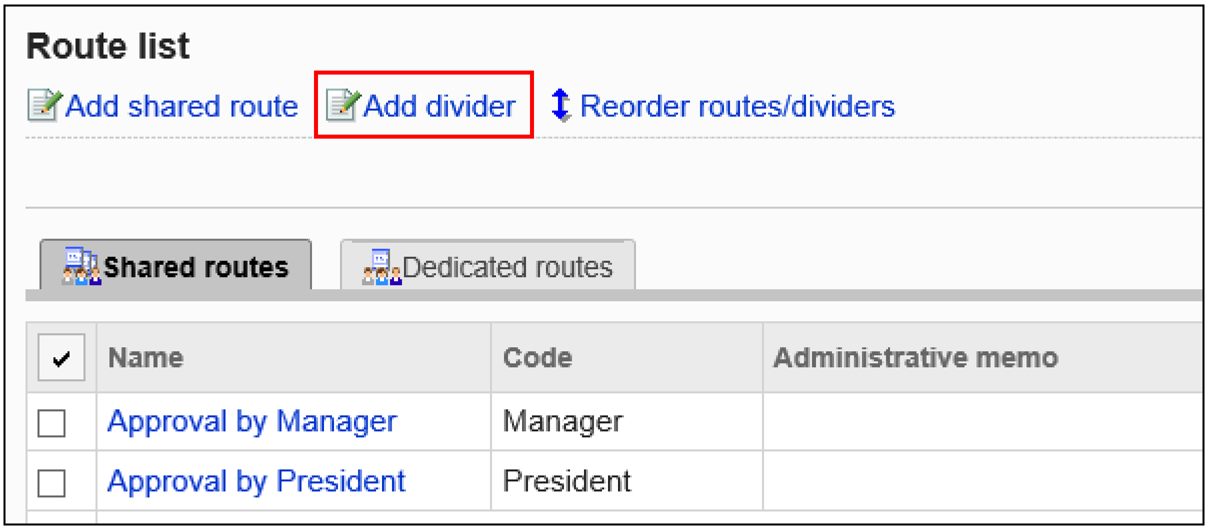
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the the shared routes tab, and then click the item to add separator lines.**



7. **Click "Yes" on the add separator lines screen.**

The added separator lines are displayed at the bottom of the list.

Change the position of separators as needed.

Reordering Shared Routes List

Change the route and the order of the separator lines in the shared route list.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

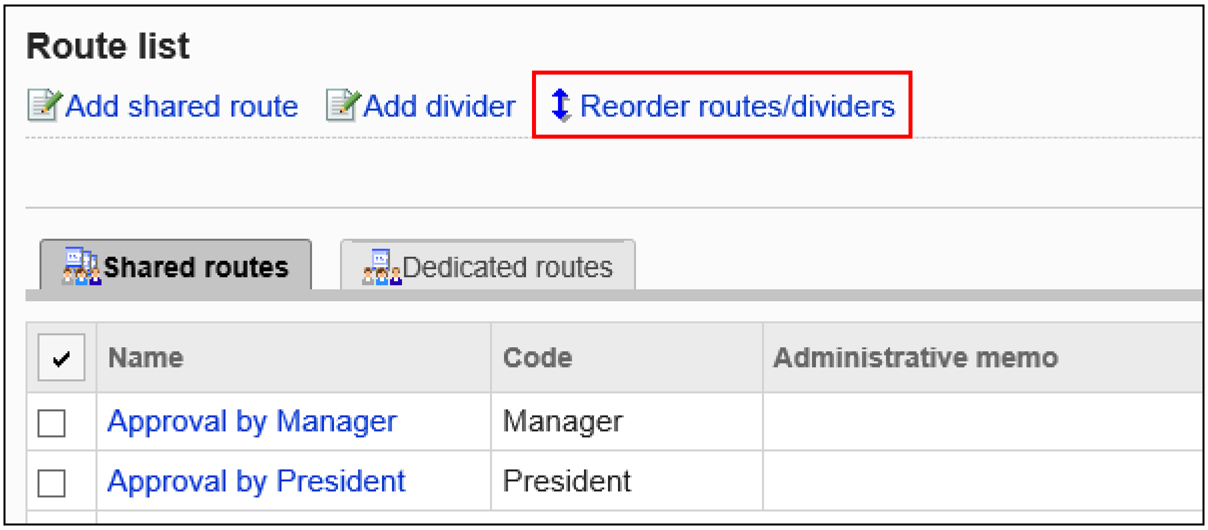
2. **Click "System settings".**

3. **Select "Application settings" tab.**

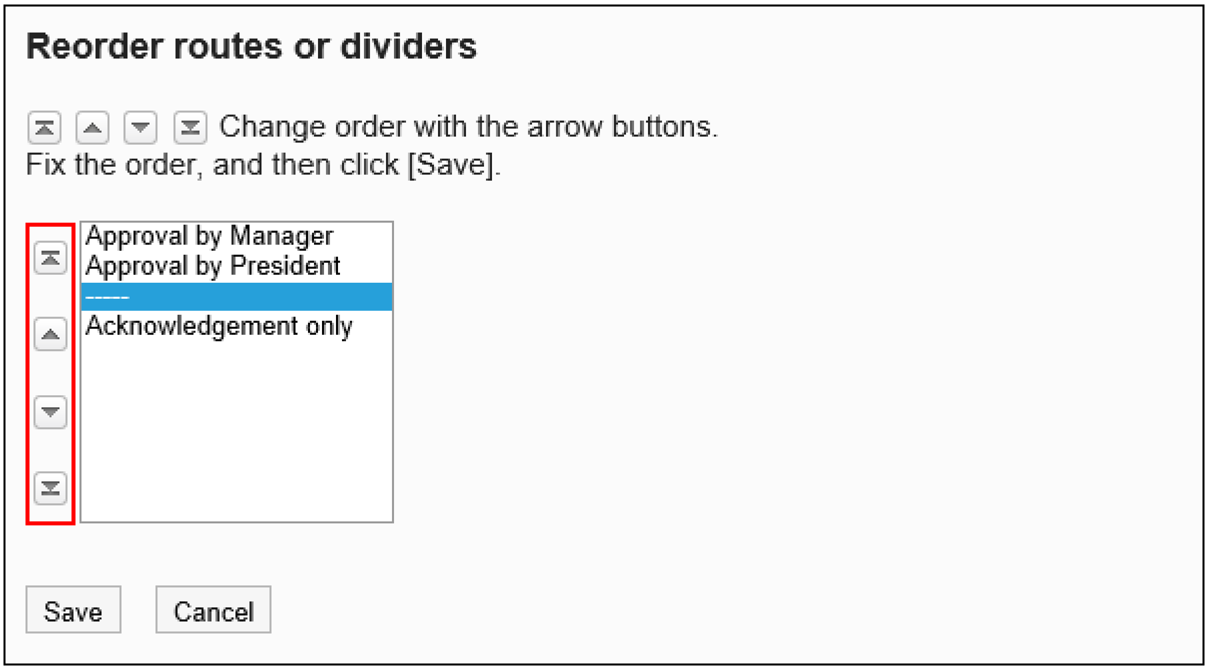
4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and then click the item to reorder routes and separator lines.**



7. **On the "Reorder Route/Separator Lines" screen, change the order of routes and separators.**



Referencing a Request Form Using a Shared Route

For each shared route, a list of the request forms using the route is displayed.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

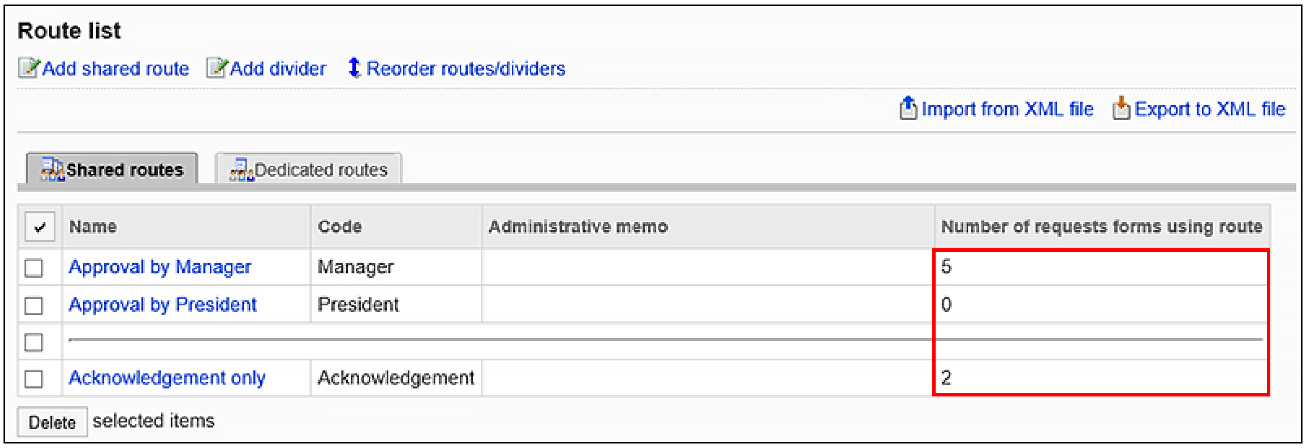
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

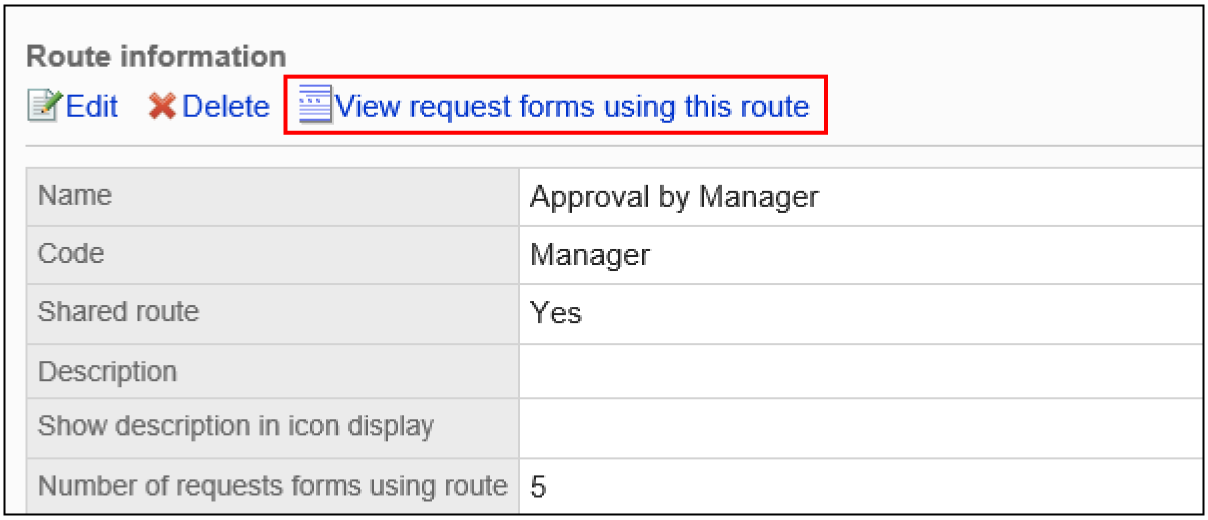
5. **Click the route list.**

6. **On the route list screen, select the shared routes tab, and click the route name of the shared route to check the usage.**

The number of request forms that are using the route is displayed in the "Number of form you are using".



7. **On the route details screen, click the item to view request form used in route information.**



8. **On the "Request Form" screen, check the request form list that uses the route.**

When you click a request form name, the the screen for request form details appears.

2.13.5. Setting up Request Forms

Request forms are entry forms prepared to fill in request details.
Each request form has its own input fields and a request route.

References

- Adding Request Forms(1326Page)
- Adding Items(1358Page)
- Setting up Route Information(1400Page)
- Setting up Route Branching(1446Page)

2.13.5.1. Flow for Creating Request Forms

Before you start creating request forms, you can write down the information below to work with them smoothly.

- What is the request form for the approval process?
- What are the required items for the request form?
- Who must be approved or who can be a user?
- What kind of process flow is best

If you have already prepared the above details, start from STEP5.

Steps:

Step 1 The patterns of requests will be identified and organized.

Step 2 Determine the patterns you want to create and identify the required items in the request form.

Step 3 Image the order of items.

Step 4 Image the process flow of who will be assigned to the approver and the sender.

Step 5 Add a request form and set basic information.

Step 6 Set up the fields in the request form.

Step 7 Confirm the request form.

Step 8 Take notes of the request form and its work history.

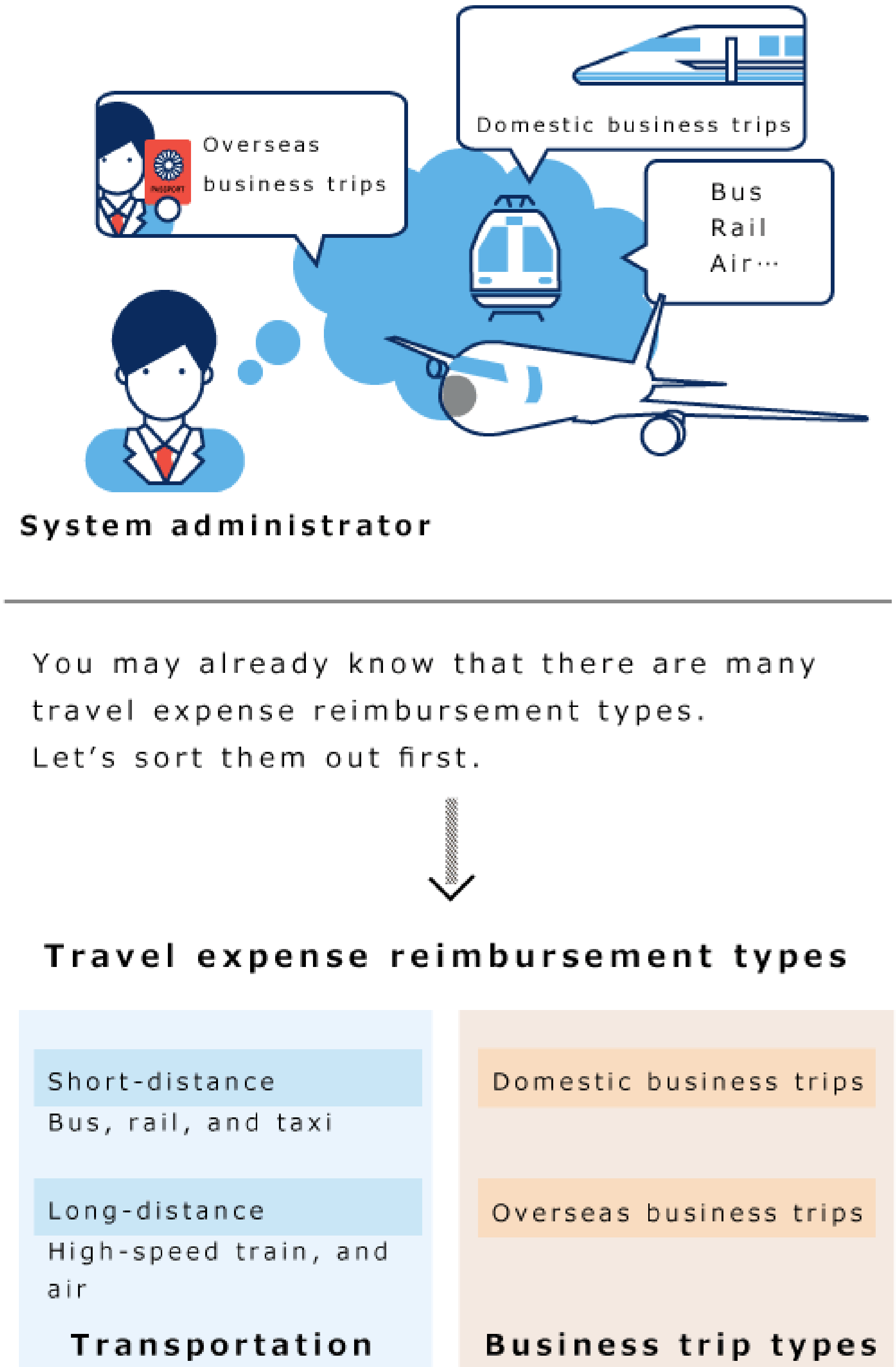
Step 9 Set up a request route.

Step 10 Confirm the request route view.

Step 11 Take notes of the application route and its work history.

Step 12 Make the request form available to users.

Step 1	**The patterns of requests will be identified and organized.**



Step 2 **Determine the patterns you want to create and identify the required items in the request form.**

System administrator

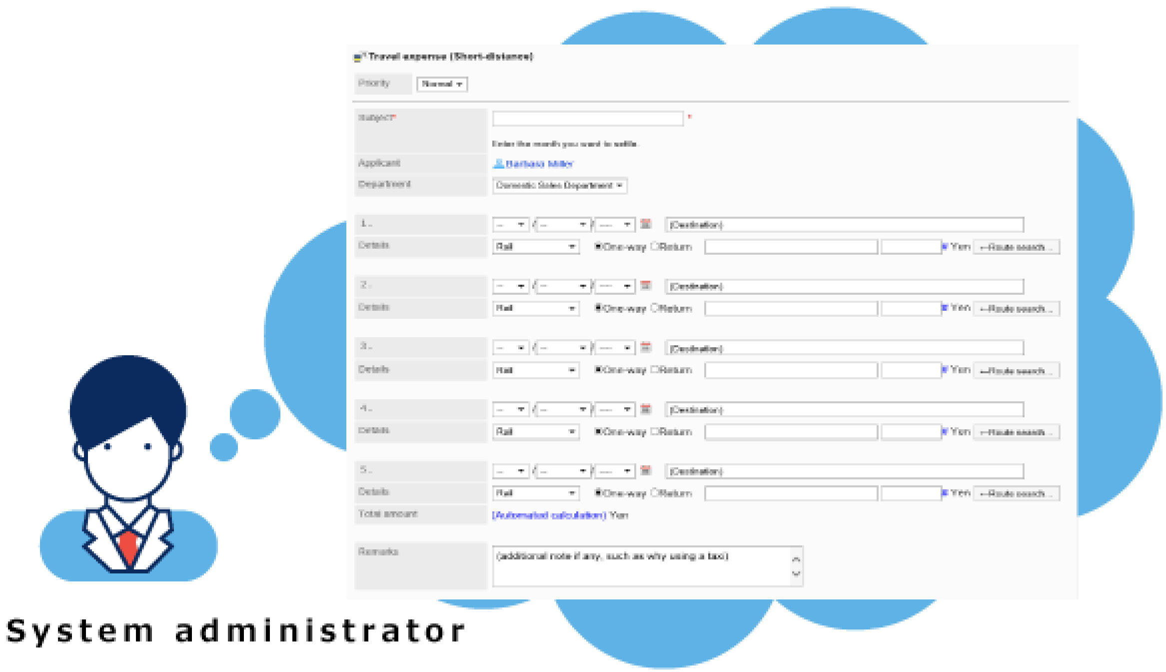
Let's think about a request form for "Short-distance business trips" by "Bus, rail, and taxi".

↓

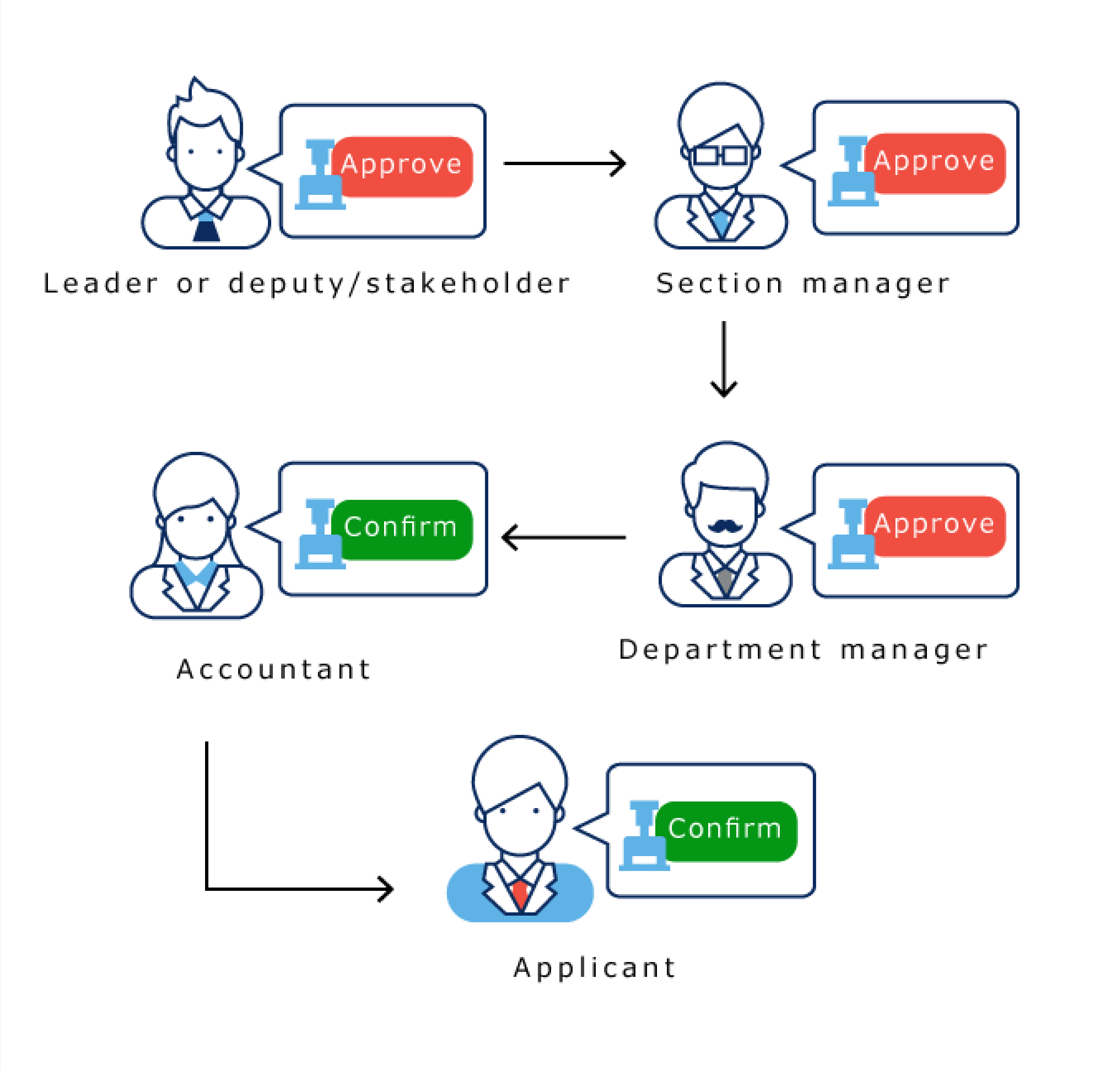
Necessary items for a request form

- Subject (will be used as a title, such as "Travel expense in September")
- Applicant name
- Department
- Travel date
- Purpose of business trip
- Transportation and one-way/return
- Routes and fares
- Maximum # of routes in one request form
- Total amount
- Remarks

Step 3 **Image the order of items.**



Step 4 **Image the process flow of who will be assigned to the approver and the sender.**



Step 5 **Add a request form and set basic information.**

Set the request Form name and request form code.

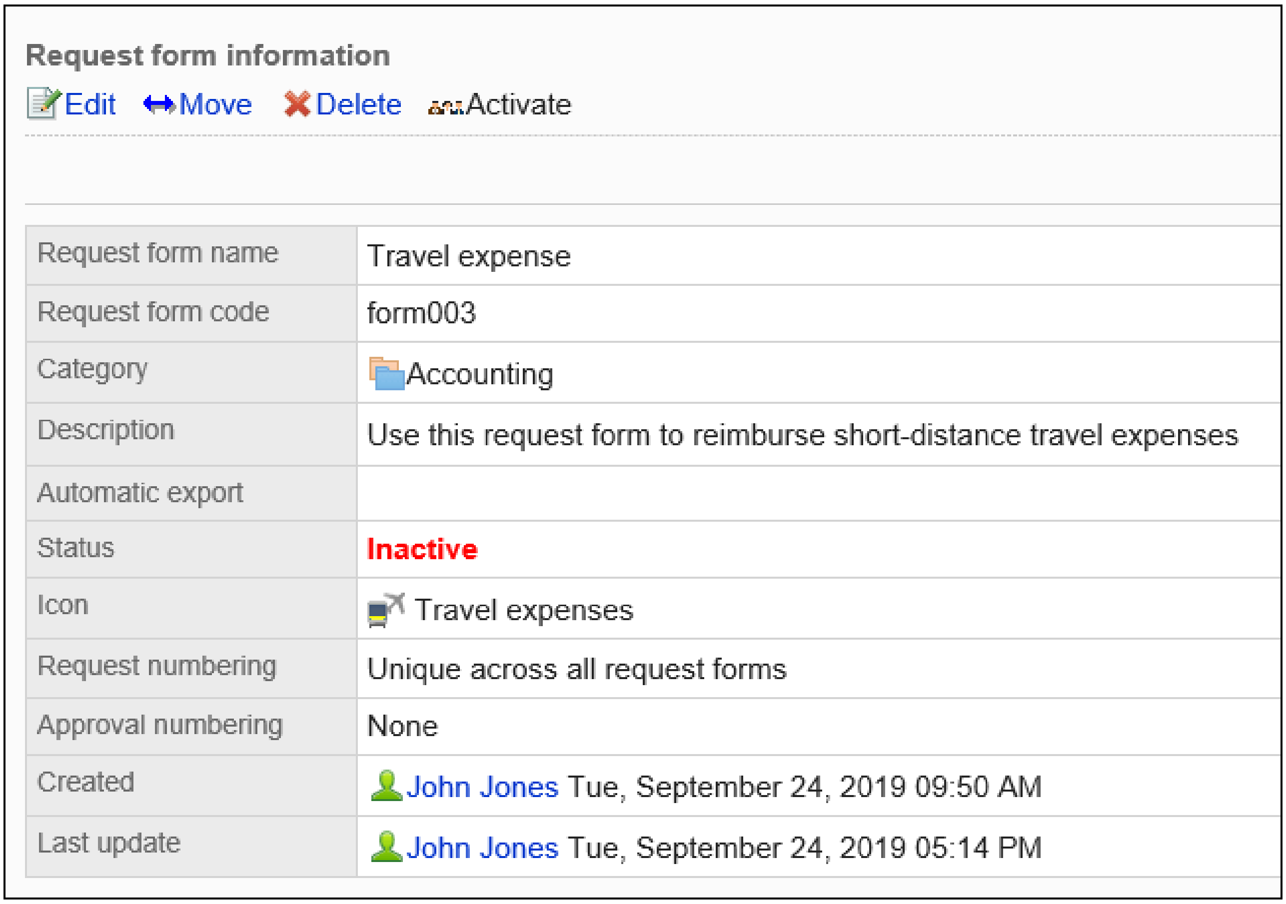
For details, refer to Adding Request Forms(1326Page).

You can also change the icon of a request form, or assign a number to the request data.

For details, refer to the following page:

Changing Request Form Icons(1334Page)

Request & Approval Numbering(1335Page)



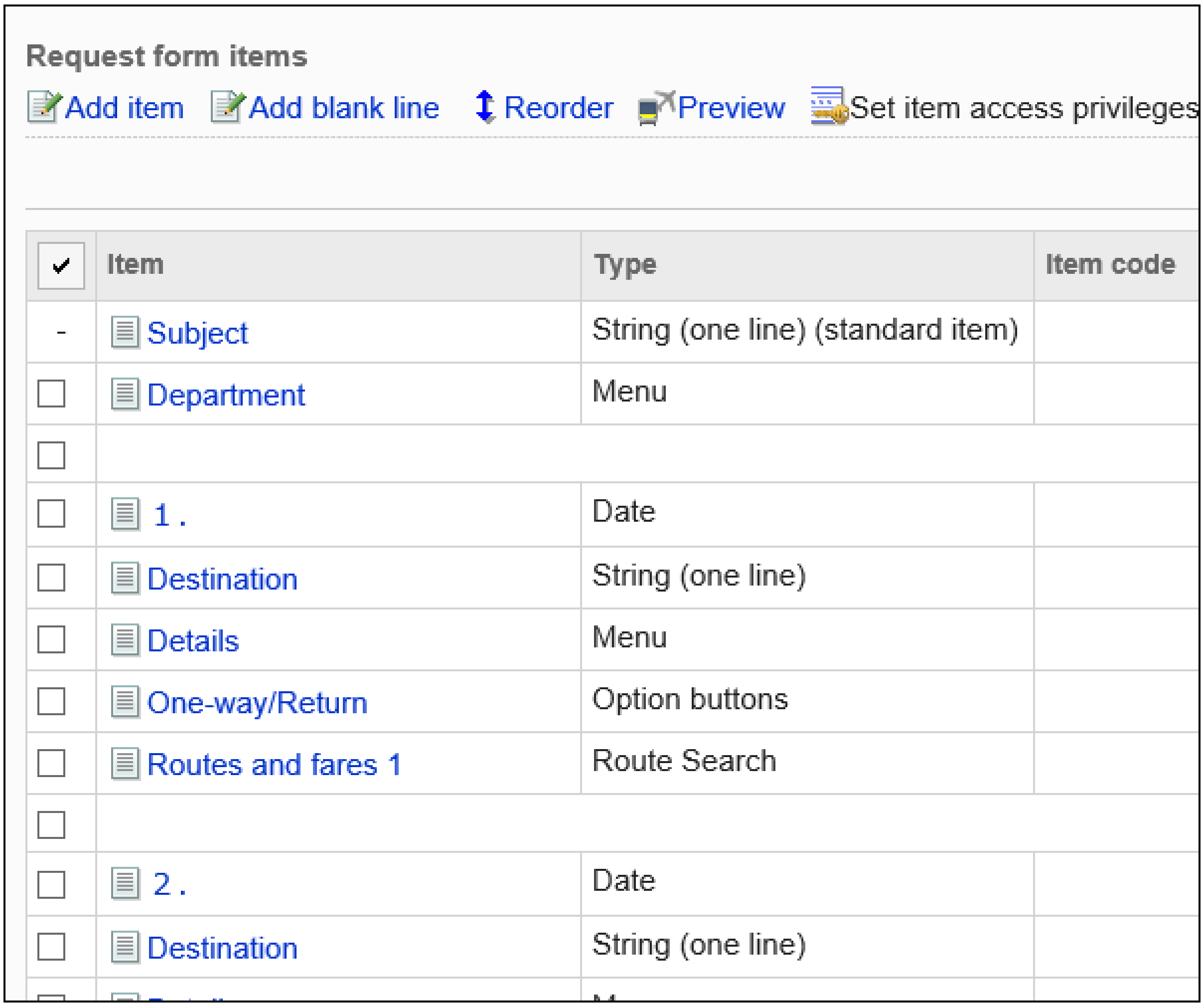
Request form information

Edit Move Delete Activate

Request form name	Travel expense
Request form code	form003
Category	Accounting
Description	Use this request form to reimburse short-distance travel expenses
Automatic export	
Status	**Inactive**
Icon	Travel expenses
Request numbering	Unique across all request forms
Approval numbering	None
Created	John Jones Tue, September 24, 2019 09:50 AM
Last update	John Jones Tue, September 24, 2019 05:14 PM

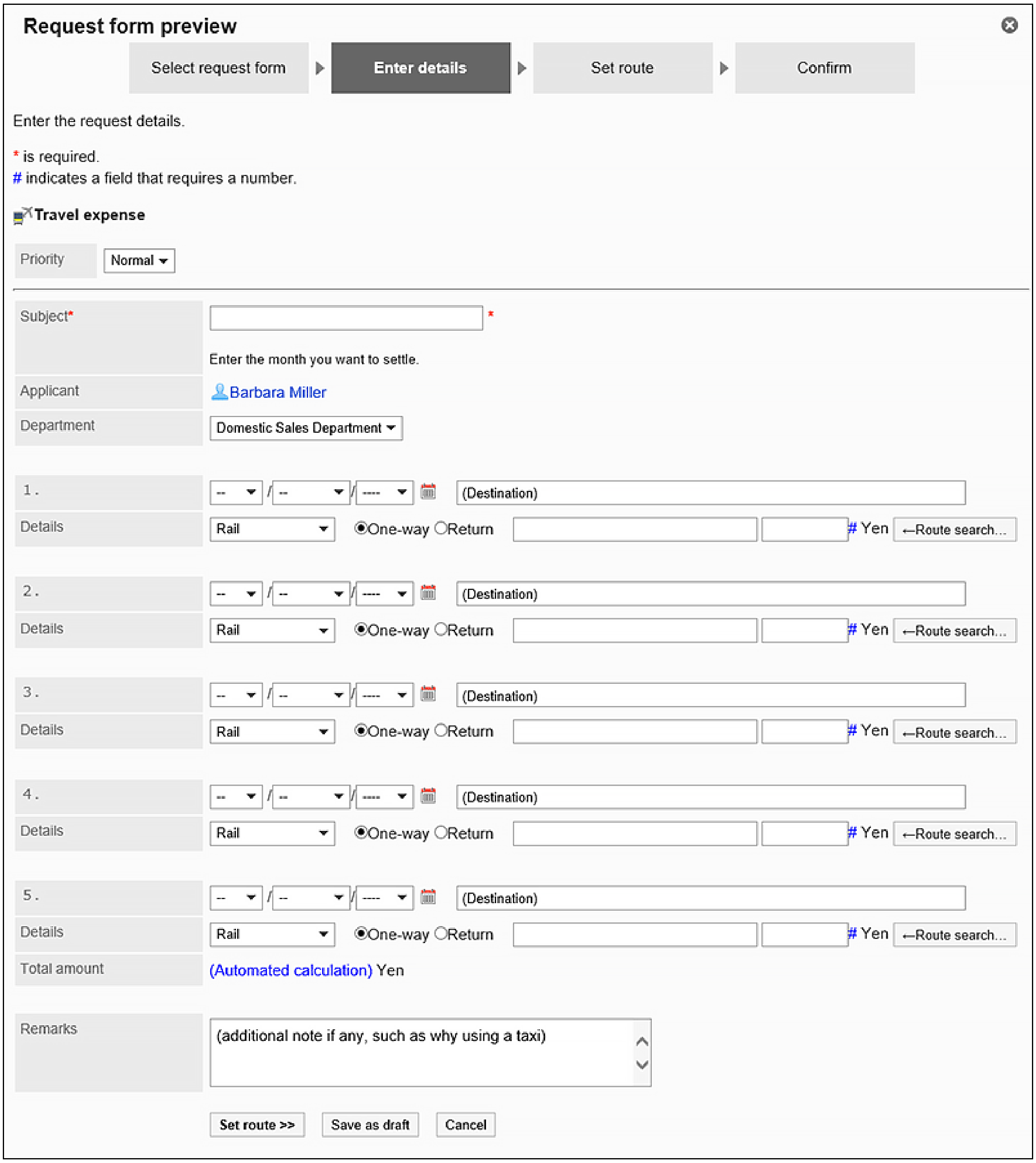
Step 6 **Set up the fields in the request form.**

For details, refer to Setting up Items in Request Forms(1357Page).



Step 7 **Confirm the request form.**

For details, refer to Previewing Request Forms(1395Page).



Step 8 **Take notes of the request form and its work history.**

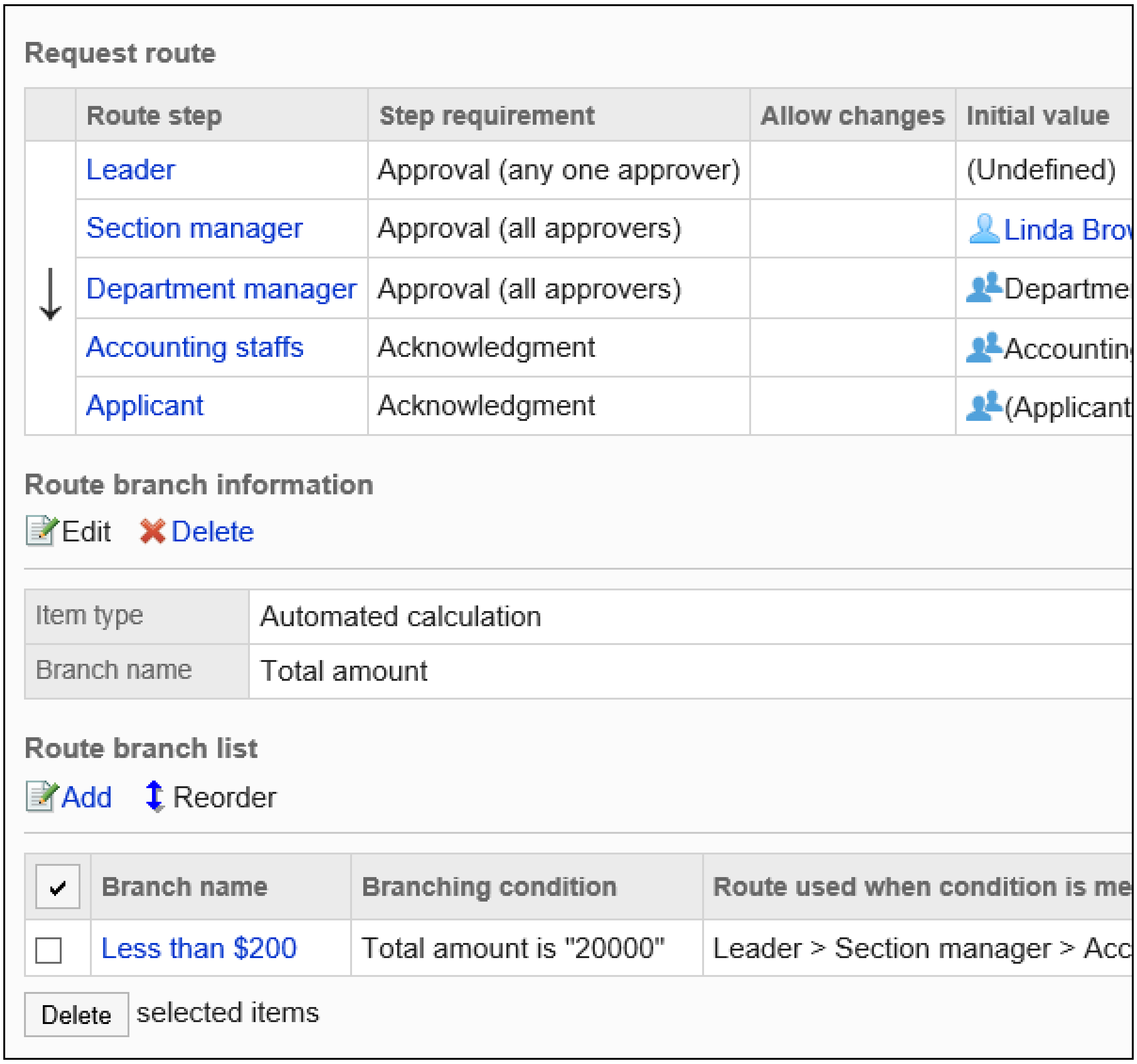
For details, refer to Changing Notes for Administrators(1331Page).

Step 9 **Set up a request route.**

For details, refer to Setting up Route Information(1400Page).

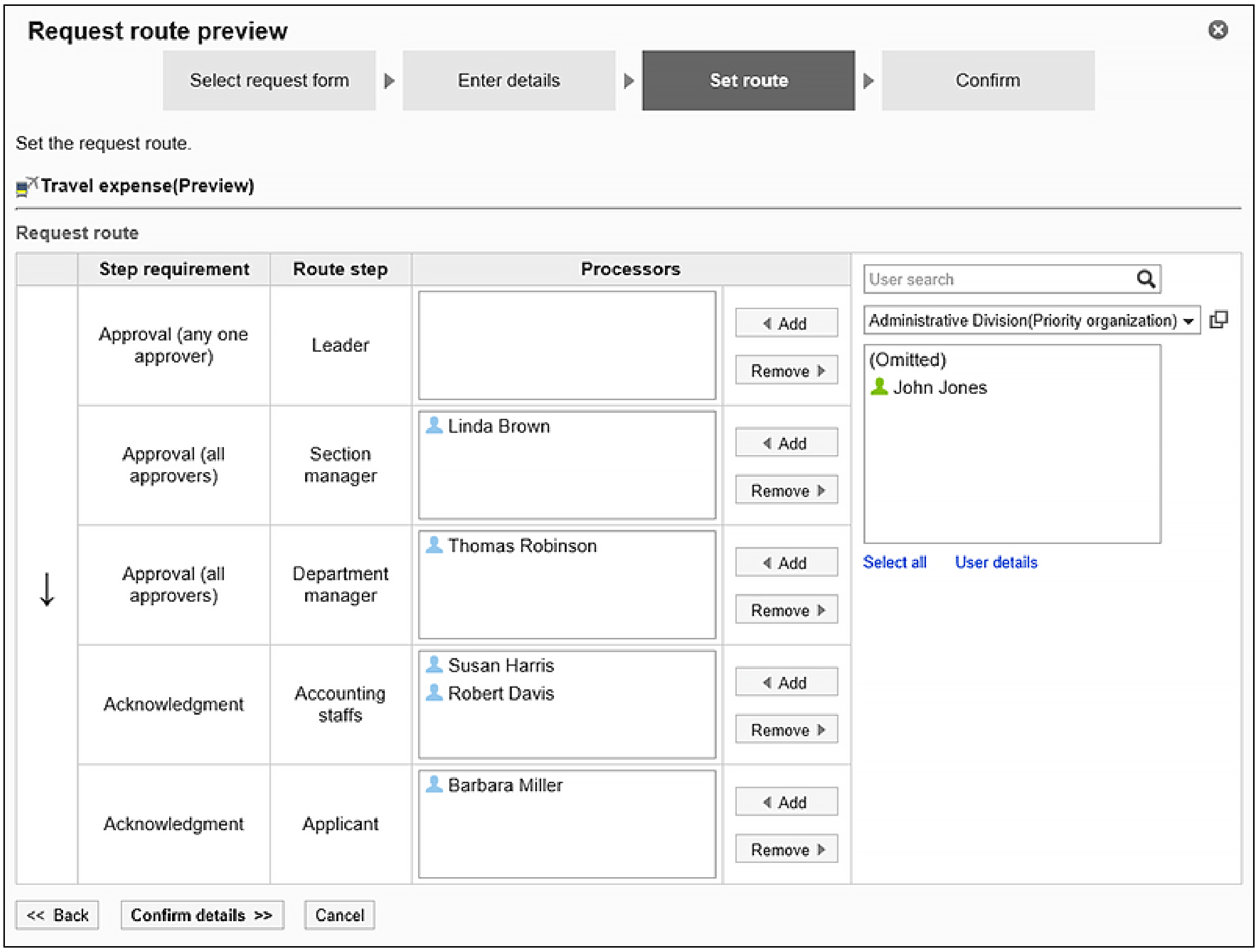
If necessary, some route steps in the configured route can be omitted to branch the route.

For details, refer to Setting up route branching(1446Page).



Step 10 **Confirm the request route view.**

For details, refer to the route preview(1444Page).



Step 11 **Take notes of the application route and its work history.**

For details, refer to the following page, depending on the type of route that you have set

Shared route: Changing Notes for Administrators(1271Page)

Dedicated route: Changing Notes for Administrators(1404Page)

Step 12 **Make the request form available to users.**

For details, refer to Enabling Request Forms(1355Page).

The request form is available to users.

2.13.5.2. Adding Request Forms

Add request forms to categories.

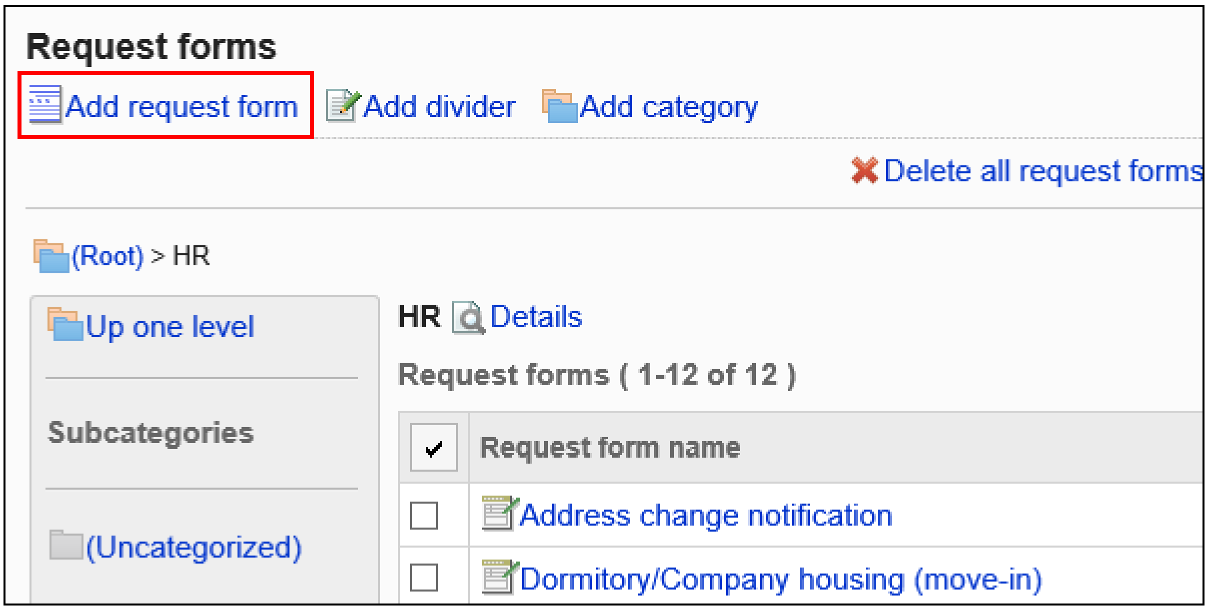
Set basic information in a request form such as a request form name and a request form code.

You cannot add request forms to "(Root)".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click to add a request form.**

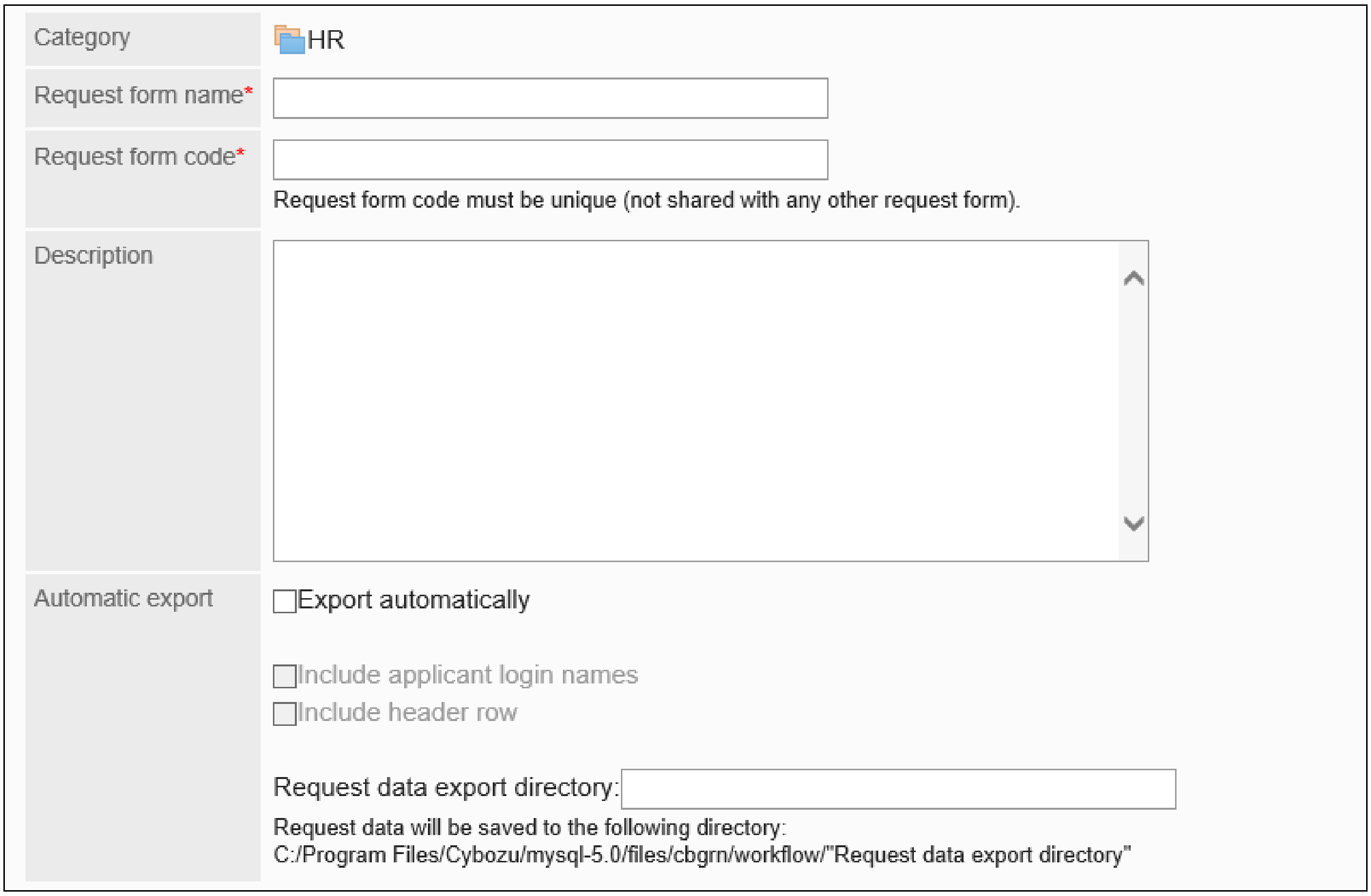
   If you do not have categories to add your reports, add categories. For details, refer to Setting Categories(1239Page).



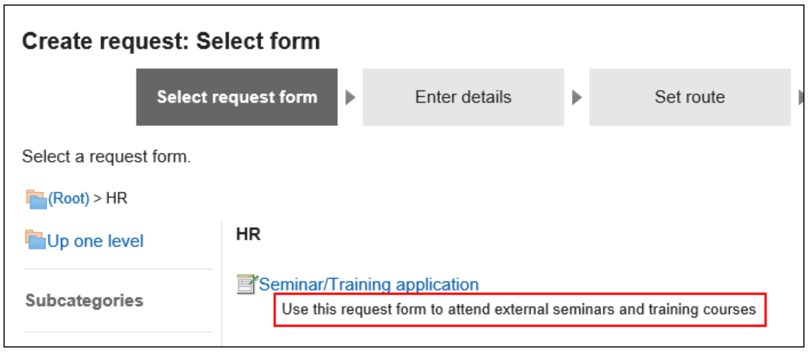
7. **On the screen to add request forms, set the required items.**

8. **Confirm your settings and click "Add".**

Setting Items for Request Forms



Item	Description
Request Form Name	Enter a request form name.
Request Form Code	Enter a request form code. This is a unique code for identifying request forms.
Description	Enter a request form description. Contents entered in this field are displayed on the screen to create requests (select request

Item	Description
	forms) of users. 
Export request data automatically	Select whether to export request data submitted using this request form to a CSV file automatically. To export request data, select the check box to export automatically, and set the following items: • Export the name of the applicant: Select whether to export the applicant's login name to the CSV file. • Include header row: Set whether to export the item names to the first row of the CSV file. • Directory name for exporting request data: Specify the name of the directory to save the exported request data. You can use single-byte alphanumeric characters, hyphens, and _ (underscores). For example, if the directory name is "auto_export", the CSV file will be stored as follows: ◦ On Windows: C:\Program Files\cybozu\mysql-5.0\files\cbgrn\workflow\auto_export\ ◦ On Linux: /usr/local/cybozu/auto_export/ For details, see Exporting Request Data to a CSV File Automatically(1485Page).

2.13.5.3. Copying Request Forms

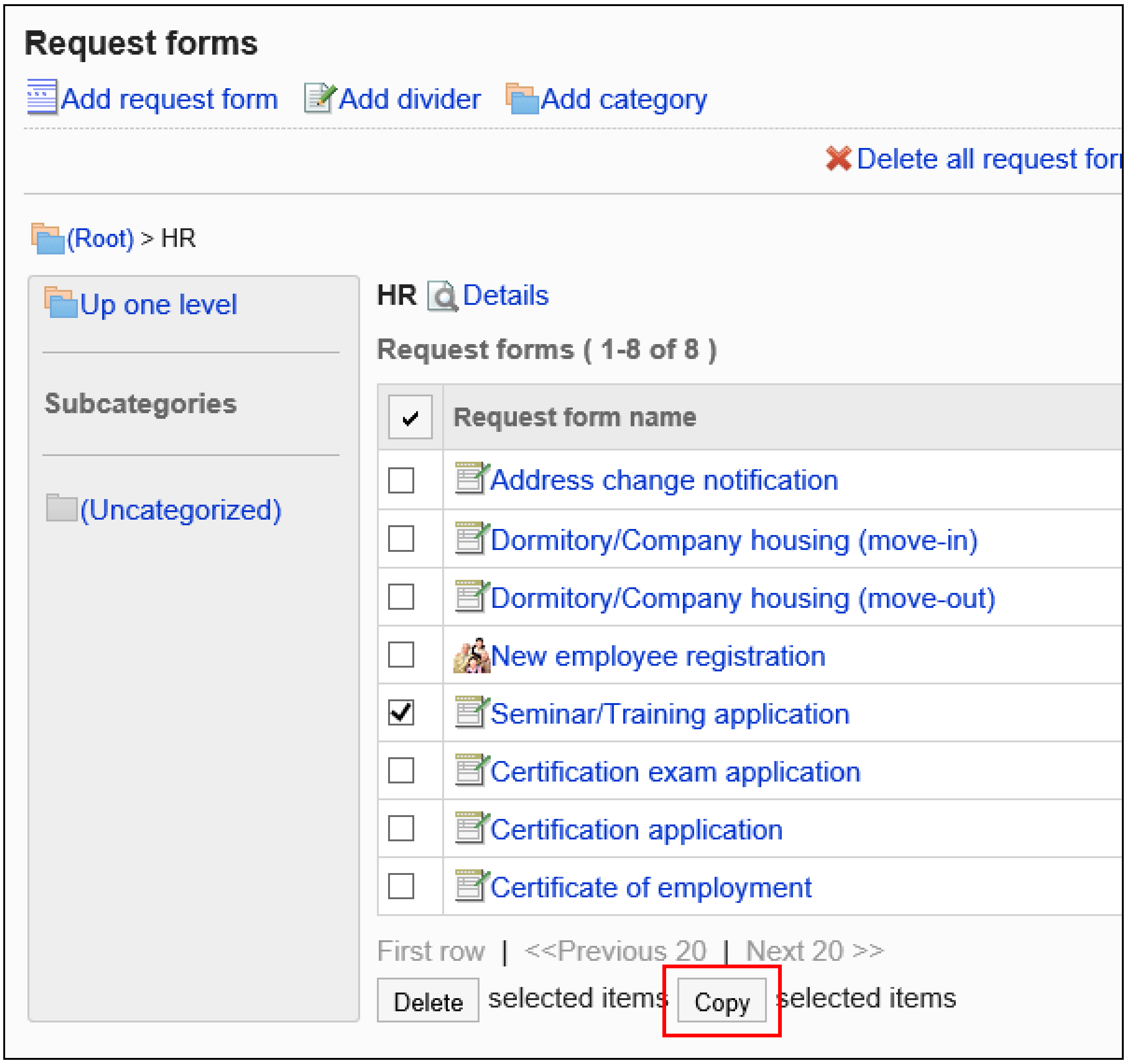
Copy an existing request form to create a new request form in the same category.

The contents of the request form copied are as follows:

- **Request Form name and request form code:**
  They will be "copy of (original)".
- **Other request form information/administrator memo/items:**
  The same as the source.
- **Request & Approval Number:**
  The same as the source.
  The last request number is not initialized. The last approval number is initialized to "0".
- **Route/Route Branching:**
  If you set a shared route in the source, the route and branch settings will be the same as the source.
  If you set a dedicated route in the source, the route and branch settings will be deleted.
- **Enabled/disabled:**
  If the source is "enabled" and you set a shared route, it also will be "enabled".
  If the source is "enabled" and you set a dedicated route, it will be "disabled" because the route will be deleted.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category.**
7. **Select a check box for the request form to copy, and then click "Copy".**
   The newly created request form is displayed at the bottom of the request form list.



8. **Change the contents of the request form as needed.**

For details, refer to the following page:

Changing Request Forms(1331Page)

Request & Approval Numbering(1335Page)

Setting up Items in Request Forms(1357Page)

Setting up Route Information(1400Page)

Setting up Route Branching(1446Page)

Enabling Request Forms(1355Page)

2.13.5.4. Modifying Request Forms

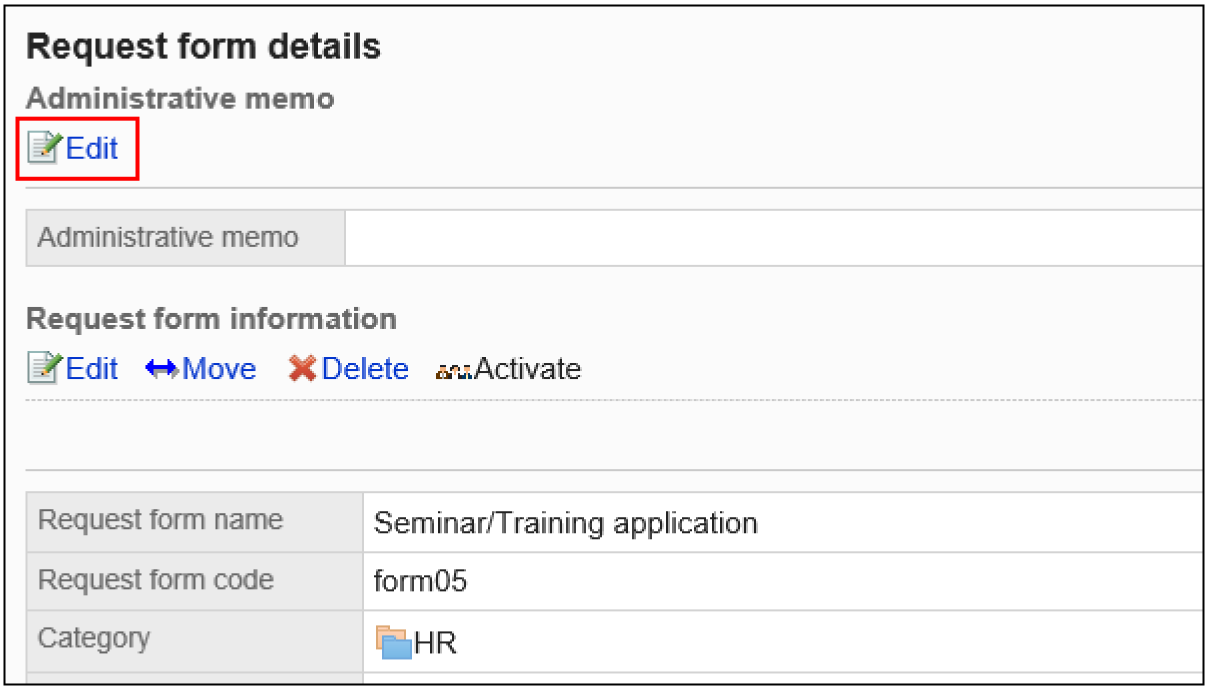
Change notes for administrators and basic information in request forms.

Changing Notes for Administrators

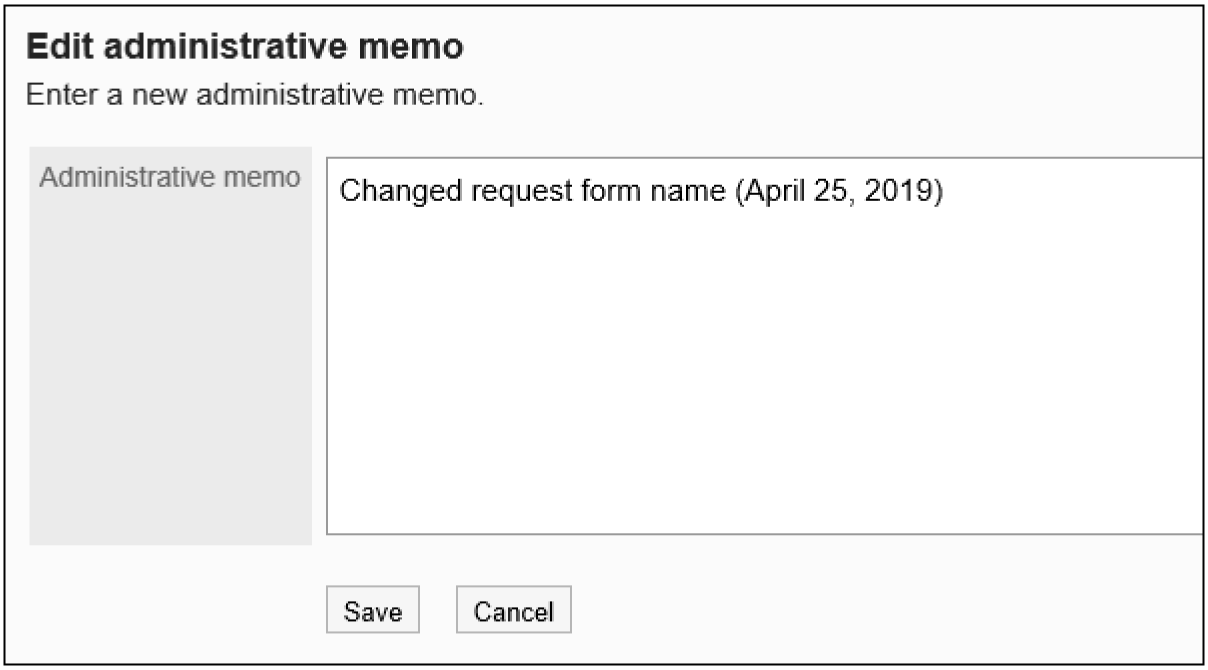
You can add work histories and notes in notes for administrators.
The notes for administrators are displayed only on system administration screens. They are not shown on user screens.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to change the notes for administrators.**
7. **On the screen for request form details, click "Edit" in the section for administrator notes.**



8. **On the screen to change notes for administrators, enter your work history and notes.**



9. **Confirm your settings and click "Save".**

Changing Request Form Information

Change basic information in request forms.

Changes to the request form information are applied to the following request data: They are not applied to request data in progress and withdrawn request data.

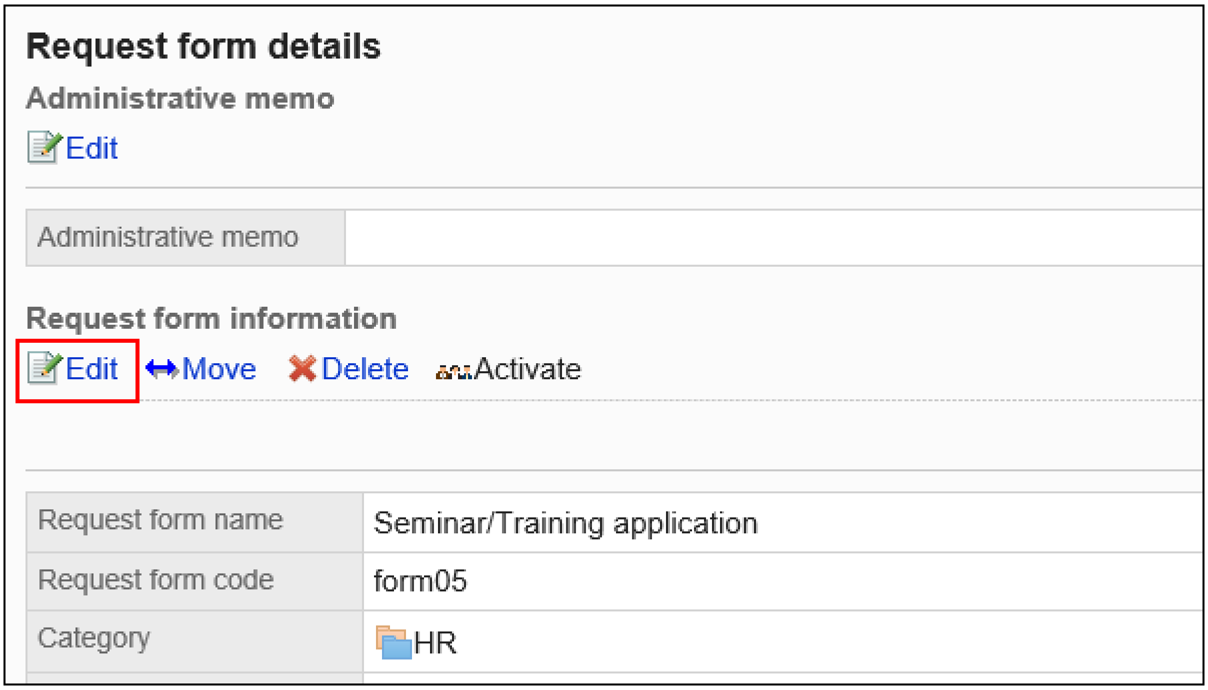
- Newly created request data

- Request data created by reusing existing request data
- Request data created from drafts

We recommend that you disable the request forms(1356Page) to prevent users from using them while working with them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to change basic information.**
7. **On the screen for request form details, click "Save" in the request form information.**



8. **On the screen to change request forms, set the required items.**

   For details, refer to Setting Items for Request Forms(1327Page).

9. **Confirm your settings and click "Save".**

Changing Request Form Icons

Set the icon appears on the user screens and the "Request form" list screen.

You can also use images specifying their URL.

By default, a standard icon is set.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Workflow".

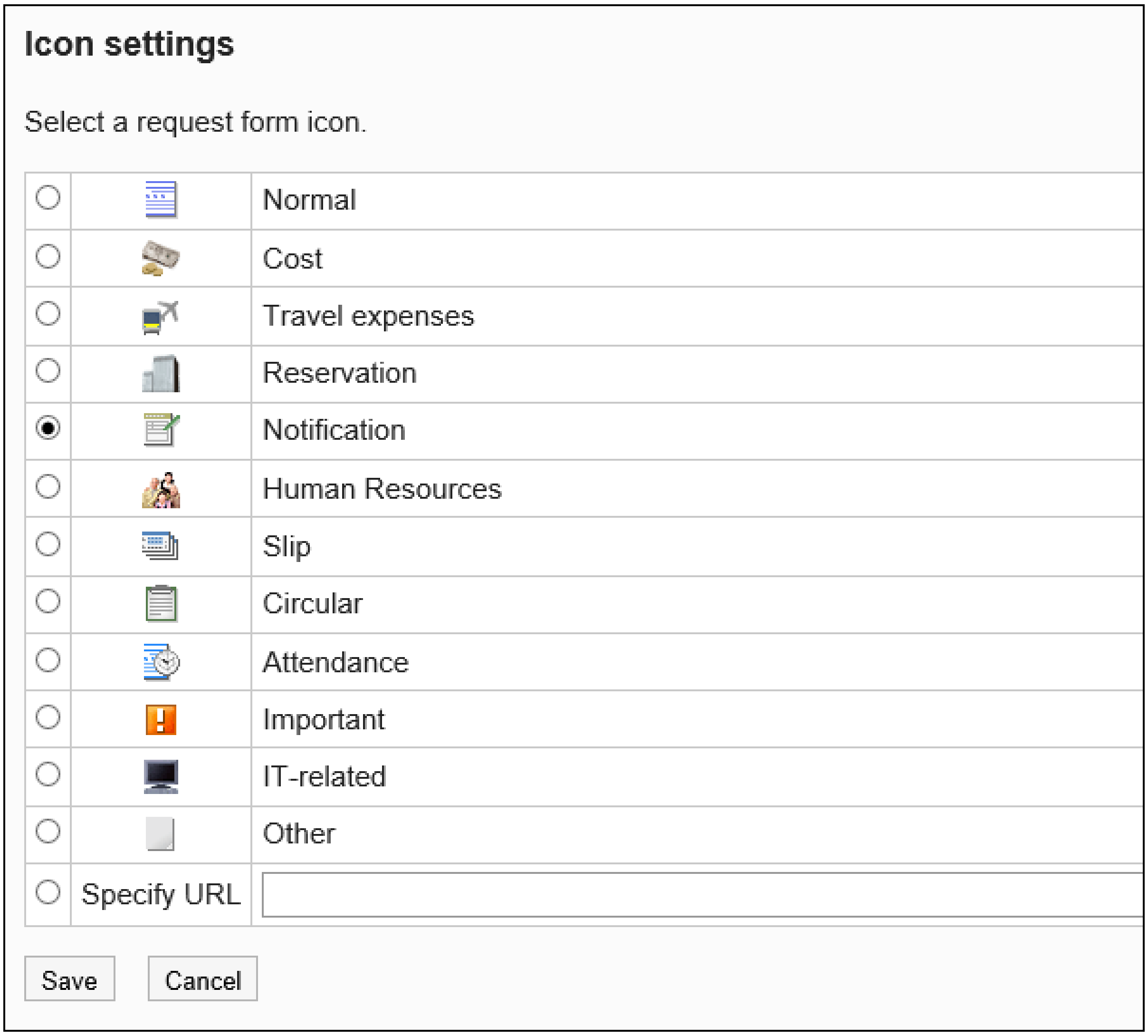
5. Click "Request Form" list.

6. On the "Request Form" screen, select a category, and then click the request form name of the request form to change icons.

7. On the screen for request form details, click to set an icon in the request form information.

8. On "Icon" screen, select an icon to use.

To set an image on the Web, select "URL" and enter the URL of the image.



9. Confirm your settings and click "Save".

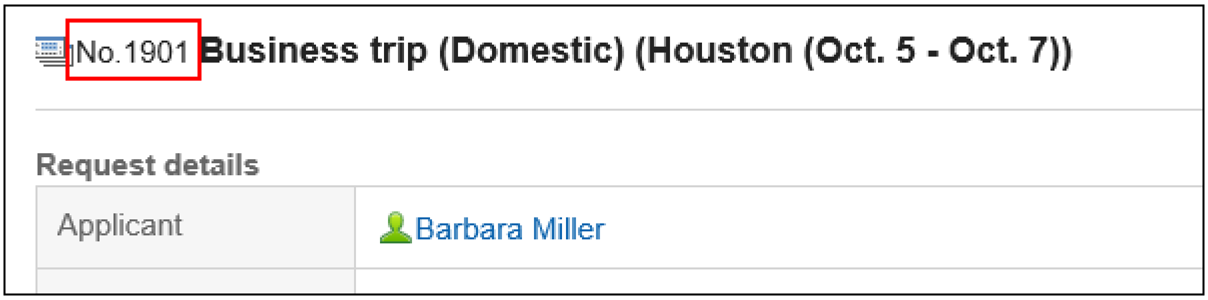
2.13.5.5. Request & Approval Numbering

Set sequential number to be applied to request data.

You can select from two types: the request number and the approval number. You can also grant both numbers.

- **Request Number:**
  The number to be granted to the request data submitted by the user. Sequential numbers are given in the order in which they are submitted.

- **Approval number:**
  The number to be granted to the request data approved by the last approver. Sequential numbers are given in the order in which they are last approved.



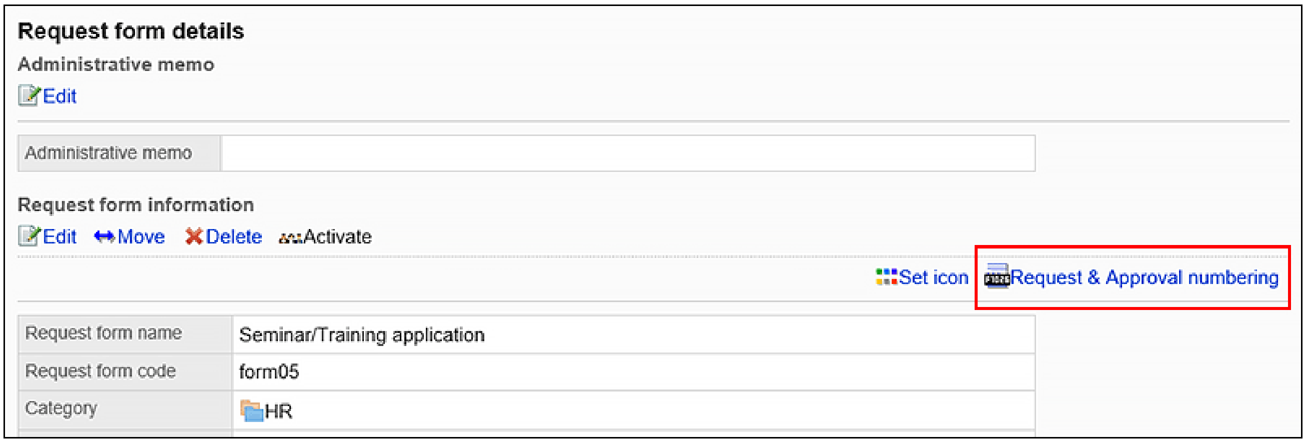
For each request form, you can set the number format and format, giving the request data a unique number. Numbers can also be used to search request data and to compile data by fiscal year.

Note

- If you delete a request data that has been assigned a sequence, the request number and the approval number assigned to the request data will be no. The number does not go up.
- The maximum value of the request number and the approval number is 2,147,483,647. When the maximum value is exceeded, the last request number and the last approval number are set to "0" and are numbered sequentially from 1.

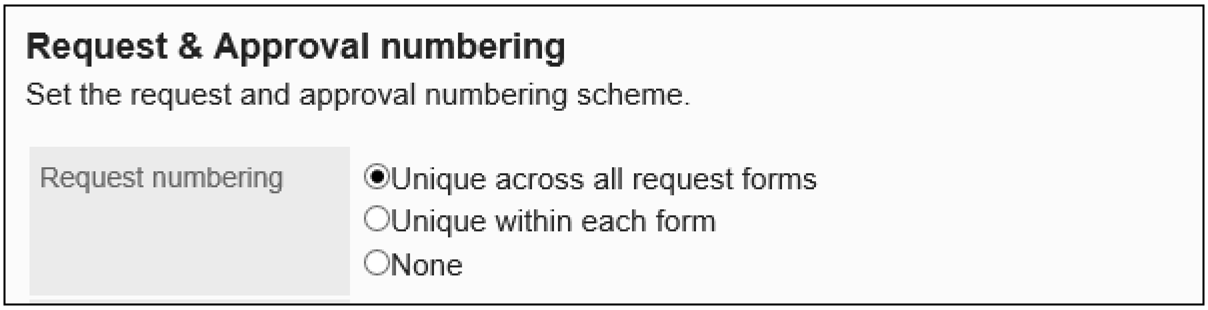
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click the Request form name of the request form to set the request number and the approval number.**
7. **On the screen for request form details, click "Request & Approval numbering" in the request form information.**



8. **In "Request numbering" field on "Request & Approval numbering" screen, select one of the following:**

- Use a common request number in all request forms:
  Regardless of the request form, a sequential number is given in the order in which the user submits the request data.
- Use the request number for each form of a request:
  Each request form is numbered sequentially in the order in which the user submits the request data.
- None

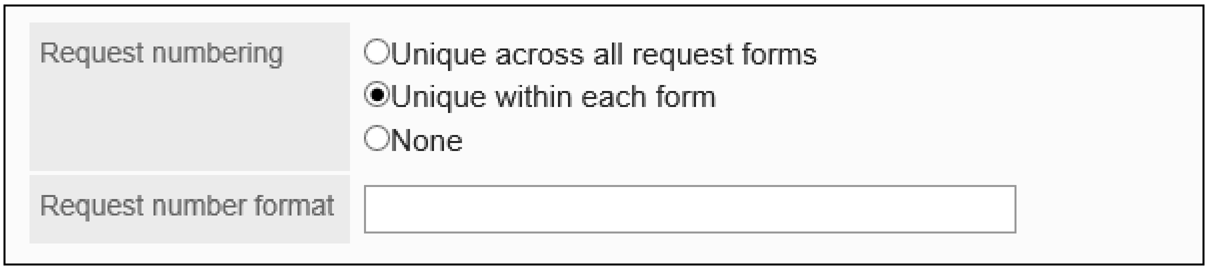


9. **Enter the "Request Number format" field.**

Set when "request number is used for each request form" is selected.

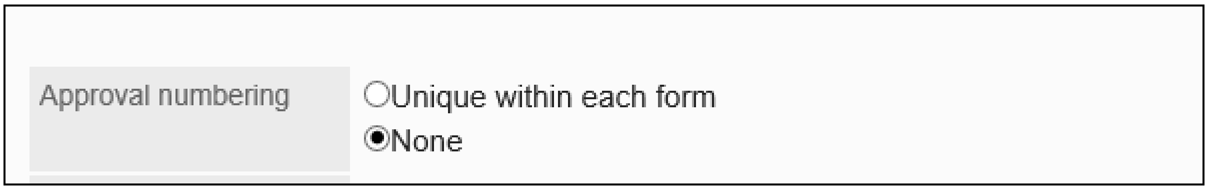
If blank, "% SN%" is applied. For details, refer to format of the request and approval numbers(1338Page).

If you select "Use a common request number in all forms", the format is not applied.



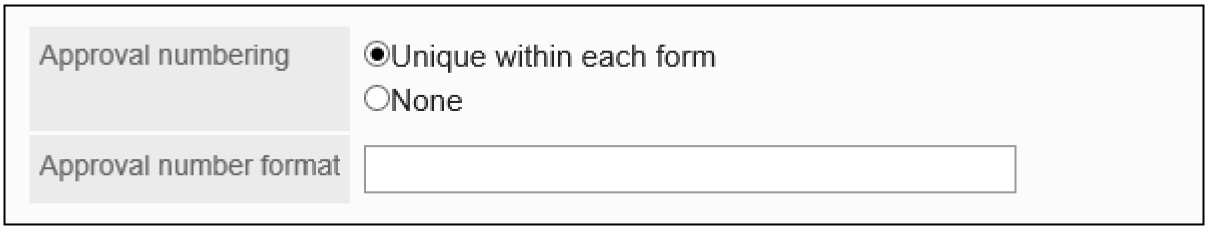
10. **In the "Approval number format" field, select one of the following**

- Unique within each form:
  Each request form has a sequential number in the order in which the final approver approves the request data.
- None



11. **Enter the "Approval number format" field.**

If you have selected "Use the approval number for each request form", set it.
If blank, "% AN%" is applied. For details, refer to format of the request and approval numbers(1338Page).



12. **Confirm your settings and click "Save".**

Request/Approval Number Format

Use keywords to format the request number and the approval number. Use only single-byte alphanumeric characters for the keywords.
If you want to set up symbols or text, enter them before and after the keywords.

Keyword	Description	Example
%SN%	Includes a sequential number of the request number.	If you set "A-% SN%": A-1, A-2, A-3...
%AN%	Includes a sequential number of the approval number.	If you set the value of "B-% AN%": B-1, B-2, B-3...
%YYYY%	Includes the year with four digits.	If you set "% YYYY%-% SN%": 2019-1, 2019-2, 2019-3...

Keyword	Description	Example
%YY%	Set the year in the following two digits	If% YY%-% SN% is set: 19-1, 19-2, 19-3...
%MM%	Includes the month.	If% YY%-% MM%-% SN% is set: 19-10-1, 19-10-2, 19-10-3...
%DD%	Includes the date.	If% YY%% MM%% DD%-% SN% is set: 191015-1, 191015-2, 191015-3...

Note

- If you have set "annual change of request/approval number" In general settings, the year is set to "% YYYY%" and "% YY%".
  For details, refer to how to set up yearly changeover of request/approval numbers(1227Page).
- The date keywords (% YYYY%,% YY%,% MM%, and% DD%) will be applied to the time zone that you have set in the "Default locale" field in the general settings for localization(561Page).
- If you want to change the format in the middle of the operation, the changed format is applied to the number of the request data granted after the change.

When You Want to Specify a Number of Digits of Request/Approval Number

If you want to specify the number of digits for the request or approval number, arrange "0" for the digits of the format you would like to use. Up to 10 characters can be specified.
An example of how to specify the number of digits for a request No.

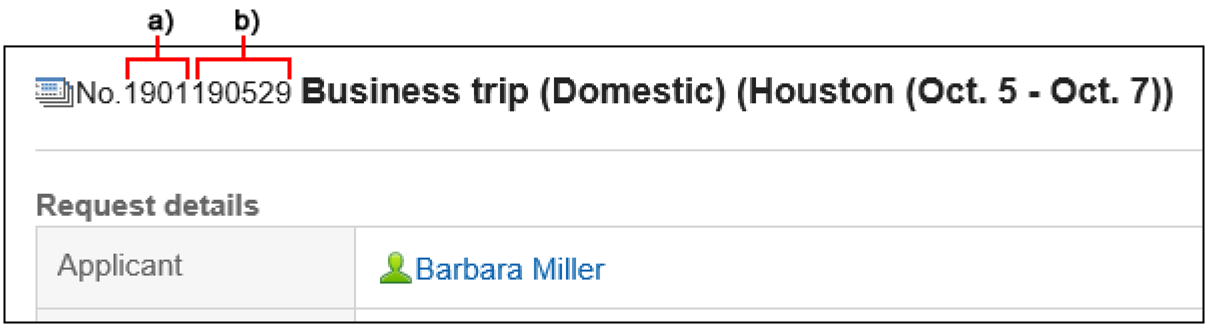
Number of Digits	Format	Screen view
Do not specify	%SN%	1
1 Digit	%0SN%	1
Two digits	%00SN%	01
Three digits	%000SN%	001

Note

- If the number of digits exceeds that of the specified length, the digits are displayed.
  For example, if you specify four digits in the format, but the number is six digits, the number of digits remains the same.
- If an invalid number of digits, such as% F00SN% and% 00SN00%, are specified as a number of digits larger than 10 digits, an error does not appear and the specified text is displayed on the screen.

When You Want to Set Both the Request Number and the Approval Number

When a user submits the request data, only the request number is granted. When the request data is last approved, the approval number is followed by the request number.

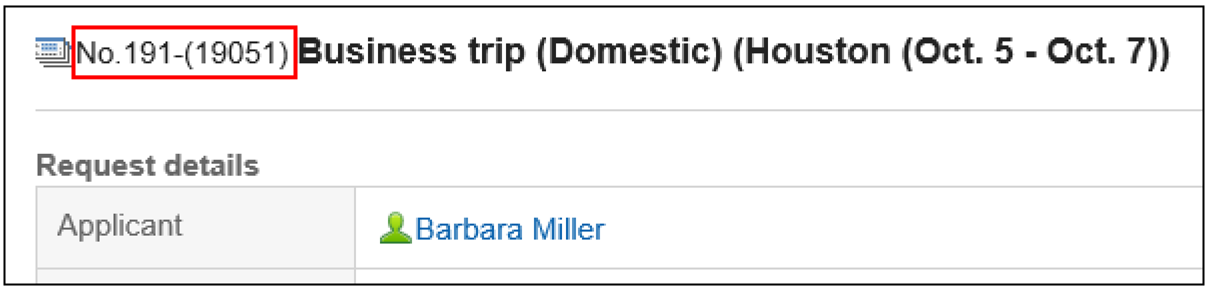


A): Request number

B): Approval number

You can differentiate the request number from the approval number by setting a symbol or text in the approval number format.

- **How to delimit numbers**

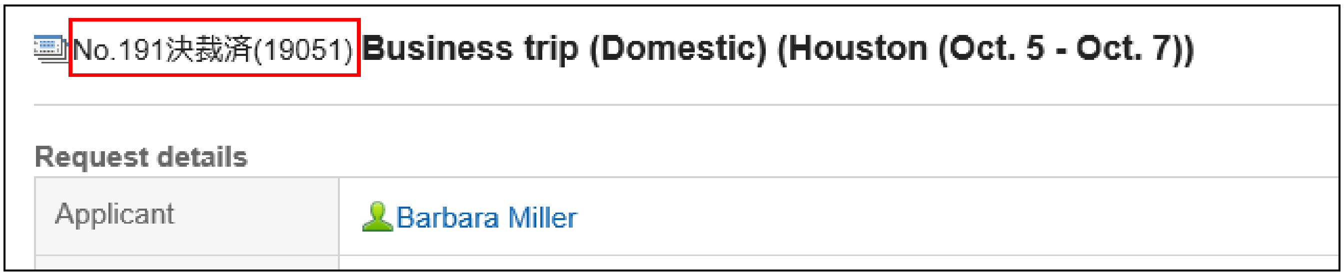


The format settings in this case are as follows

Request number format:% YY%% SN%

Approval number format:-(% YY%% MM%% AN%)

- **How to delimit numbers by string**



The format settings in this case are as follows

Request number format:% YY%% SN%

Approval number format: approved (% YY%% MM%% AN%)

Initializing Request Numbers

If you have set the request number to "Use request numbers per request Form", you can initialize the request number. When you initialize, you can specify the initial value of the request number.

Caution

- The initial request number cannot be restored.

Note

- If you have set the request number to "Use a common request number in all forms", you cannot initialize the request number.
- If you want to initialize the request number in each year, the annual changeover of the request/approval number(1227Page) is useful in general settings. The last request number is automatically set to "0" and starts the sequence from 1.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**

5. **Click "Request Form" list.**

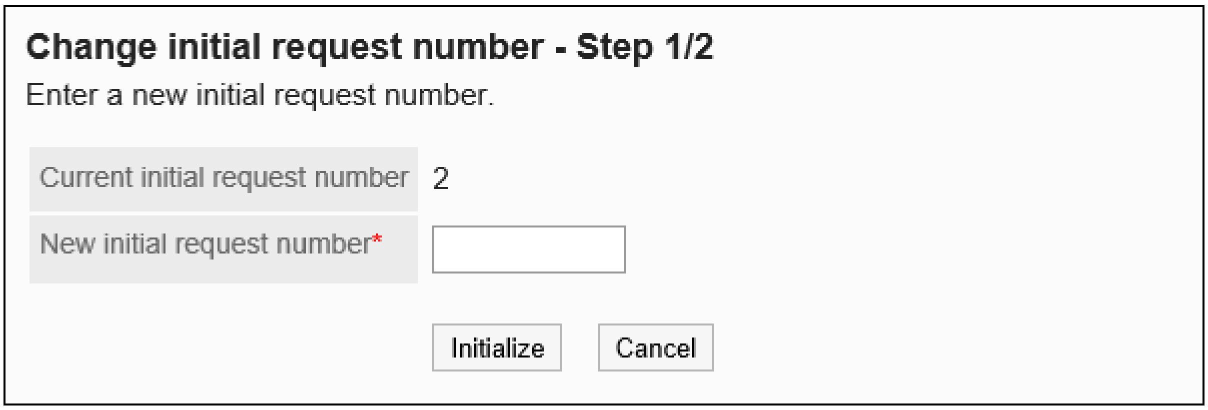
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to initialize the request number.**

7. **On the screen for request form details, click "Initialize" in "Last request number" field in the request form information.**

8. **On the "Request number initialization - Step 1/2" screen, enter the default value for the new request number and click Initialize.**

The initial request number that is added after the initialization is added to the default value of 1.

For example, if a new request number is set to "100", the request number of the initial request data submitted is "101".



9. **On the "Request number initialization - Step 2/2" screen, click Yes.**

Initializing Approval Numbers

Initialize the approval number.
When initializing, you can specify the initial value of the approval number.

Caution

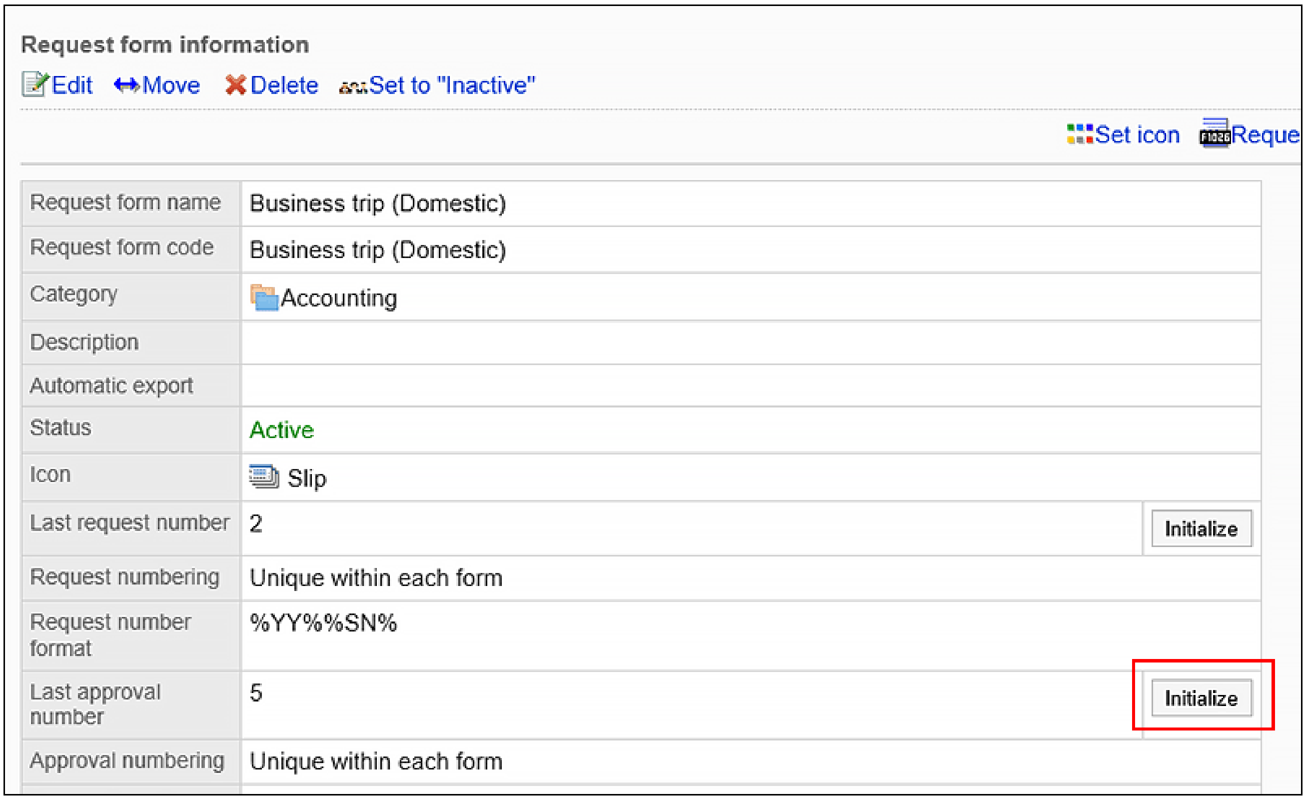
- The initial approval number cannot be restored.

Note

- If you want to initialize the approval number for each year, the annual changeover of the request/approval number(1227Page) is useful in the general settings. At the specified date and time, "0" is automatically set to the last approval number and starts the sequence from 1.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to initialize the approval number.**
7. **On the screen for request form details, click "Initialize" in "Last approval number" field in the request form information.**



Request form information

Edit Move Delete Set to "Inactive"

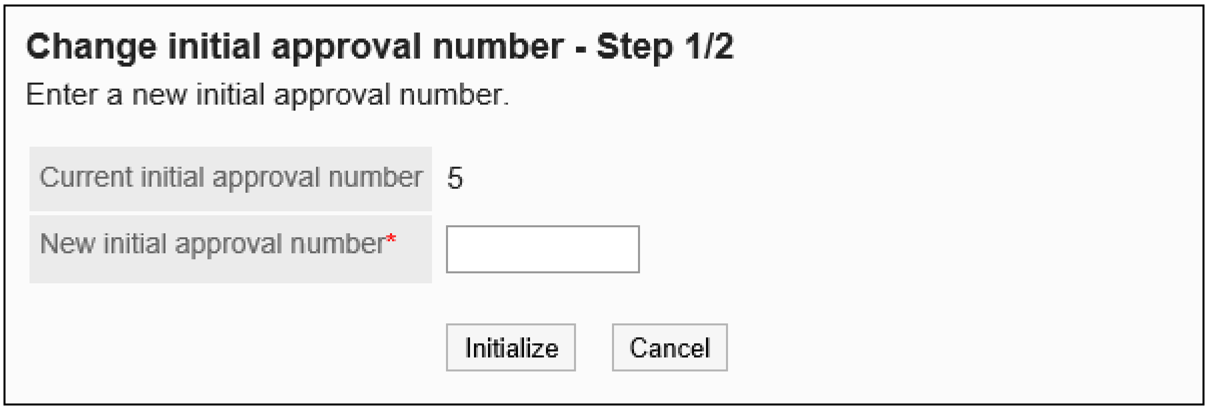
Set icon Reque

Request form name	Business trip (Domestic)	
Request form code	Business trip (Domestic)	
Category	Accounting	
Description		
Automatic export		
Status	Active	
Icon	Slip	
Last request number	2	Initialize
Request numbering	Unique within each form	
Request number format	%YY%%SN%	
Last approval number	5	Initialize
Approval numbering	Unique within each form	

8. **On the "Approval number initialization - Step 1/2" screen, enter the default value for the new approval number and click Initialize.**

The initial approval number that is added after the initialization is added to the default value of 1.

For example, if you have a new approval number of "100", the initial approval number of the first approved request data will be "101".



Change initial approval number - Step 1/2

Enter a new initial approval number.

Current initial approval number	5
New initial approval number*	

Initialize Cancel

9. **On the "Approval number initialization - Step 2/2" screen, click Yes.**

2.13.5.6. Moving Request Forms

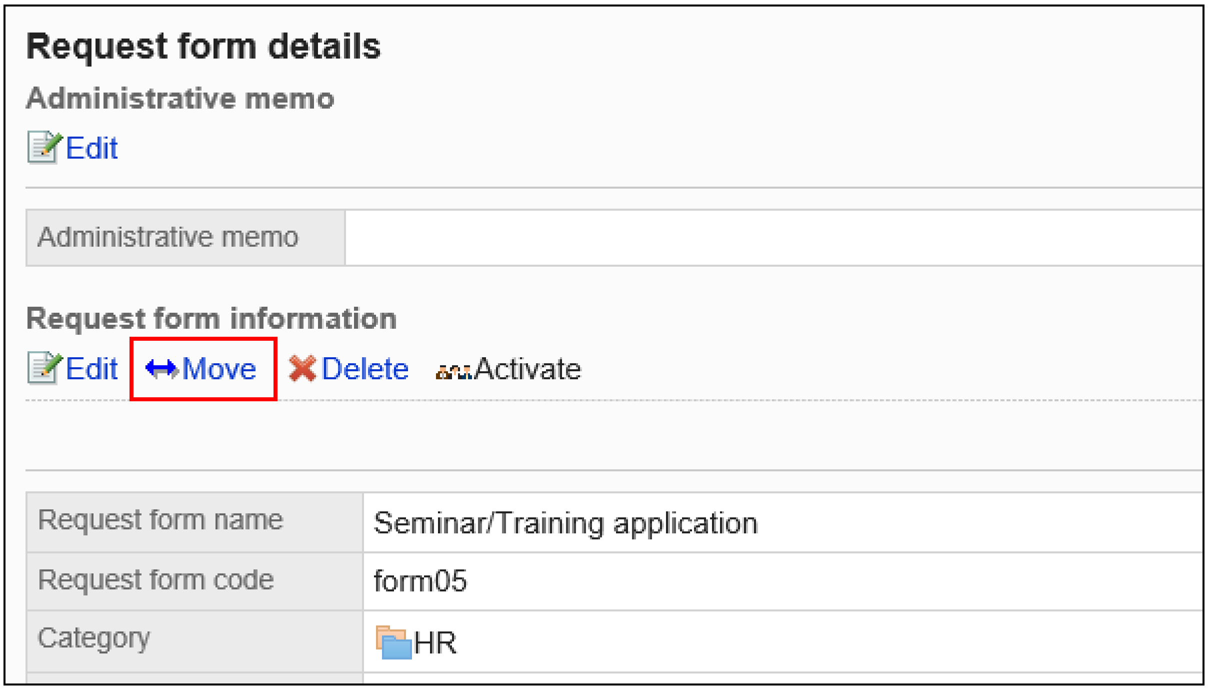
Move request forms to other categories.

Note

- If the destination category has user rights set for it, the request forms may not be available to users depending on their user rights. Check the user rights of the destination category before moving request forms.
  For details, refer to Setting Access Permissions for Categories(1249Page).

Steps:

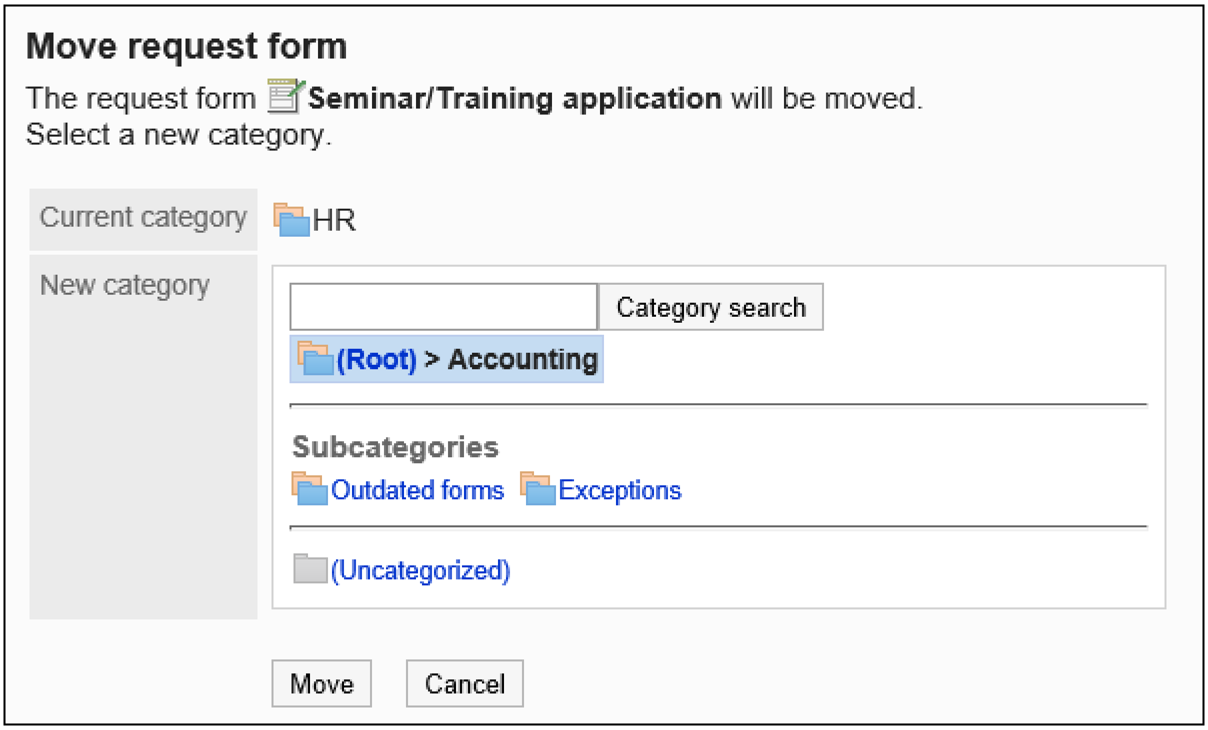
1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to move.**
7. **On the screen for request form details, click "Move" in the request form information.**



8. On the screen to move request forms, select the target category.

You can search for categories to move categories into by entering keywords and clicking "Category search".

Clicking on a category name moves you to the subcategory of the category you clicked.



9. **Confirm your settings and click "Move".**

2.13.5.7. Deleting Request Forms and Dividers

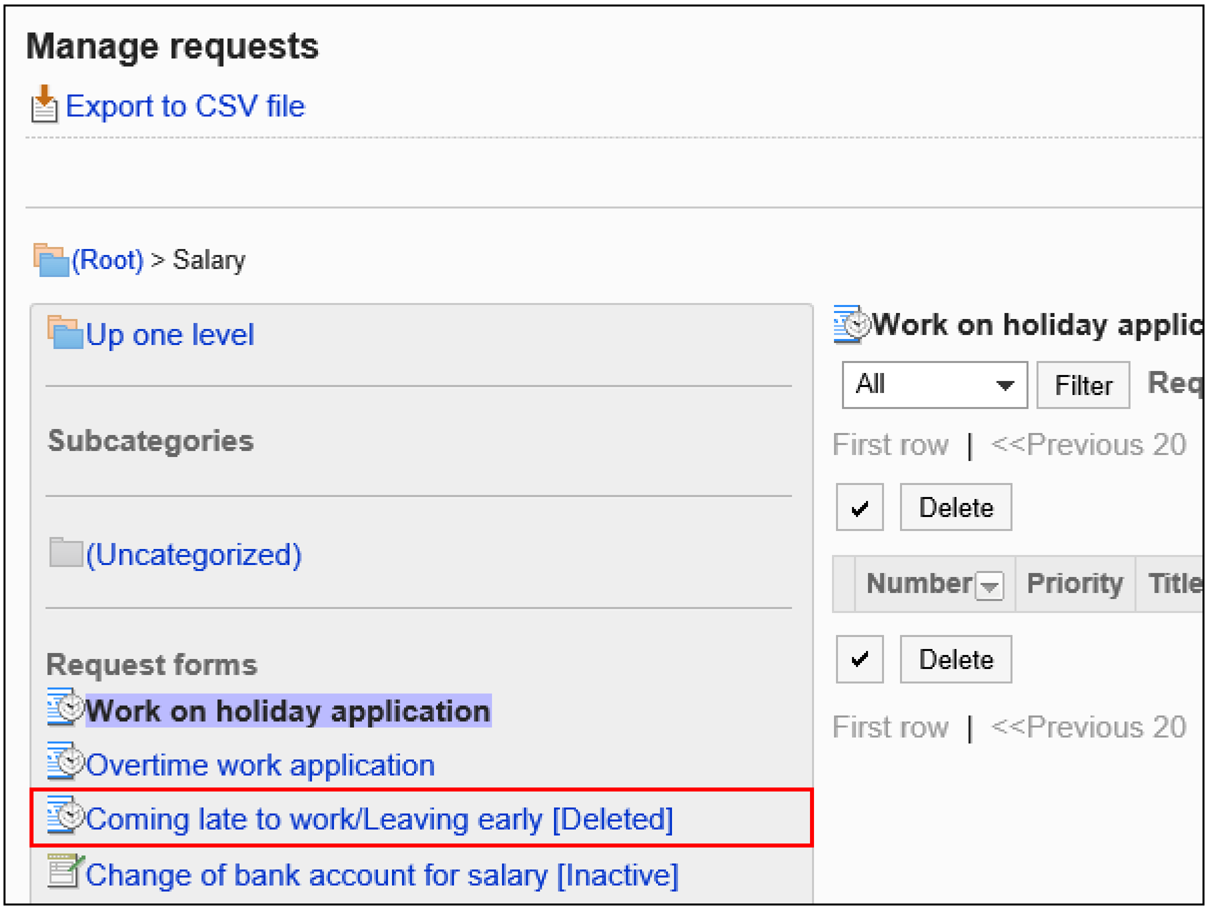
Delete request forms and separator lines.

Deleting request forms does not delete request data and draft requests already created. However, the following functions are disabled:

- Reusing request data
- Changing request data in drafts
- Submitting request data from drafts

Requests using the deleted request form remain in the same category before the deletion.

On the screen to manage request data, "delete" is added after the deleted request form name.



Caution

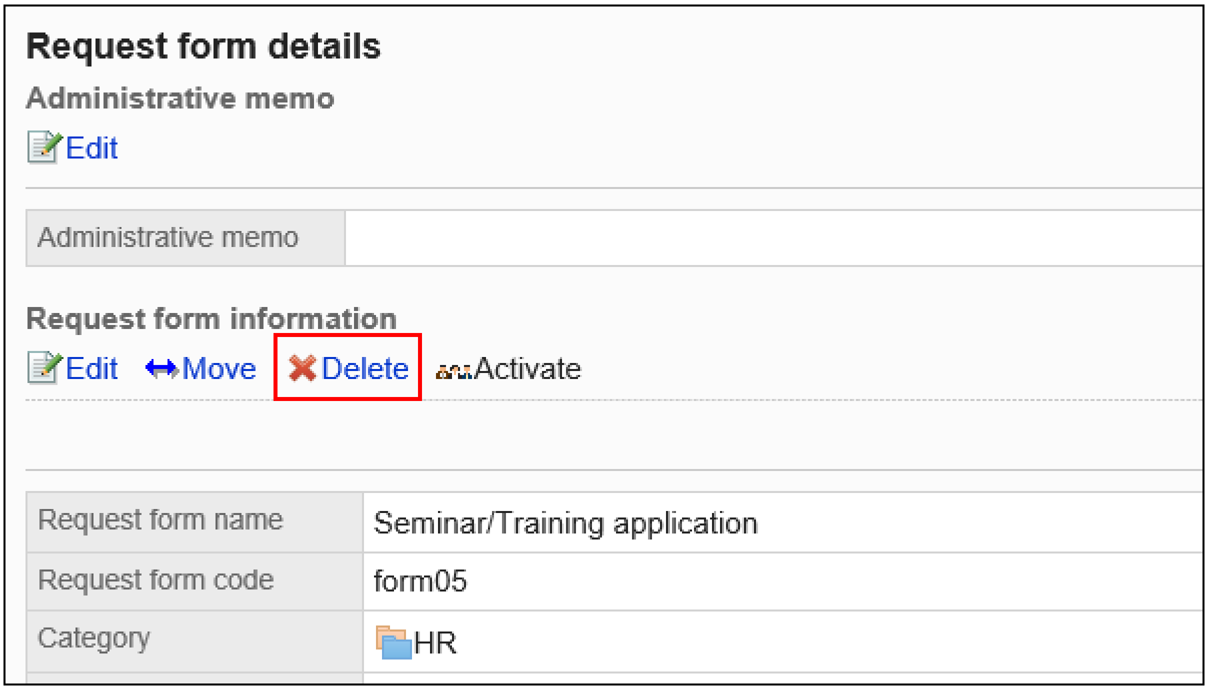
- Deleted request forms cannot be restored.

Deleting Request Forms One by One

Delete request forms one at a time.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to delete.**
7. **On the screen for request form details, click "Delete" in the request form information.**



8. Click "Yes" on the screen to delete request forms.

Deleting Multiple Request Forms and Dividers in Bulk

For each category, select request forms and separator lines to delete, and delete them all together.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

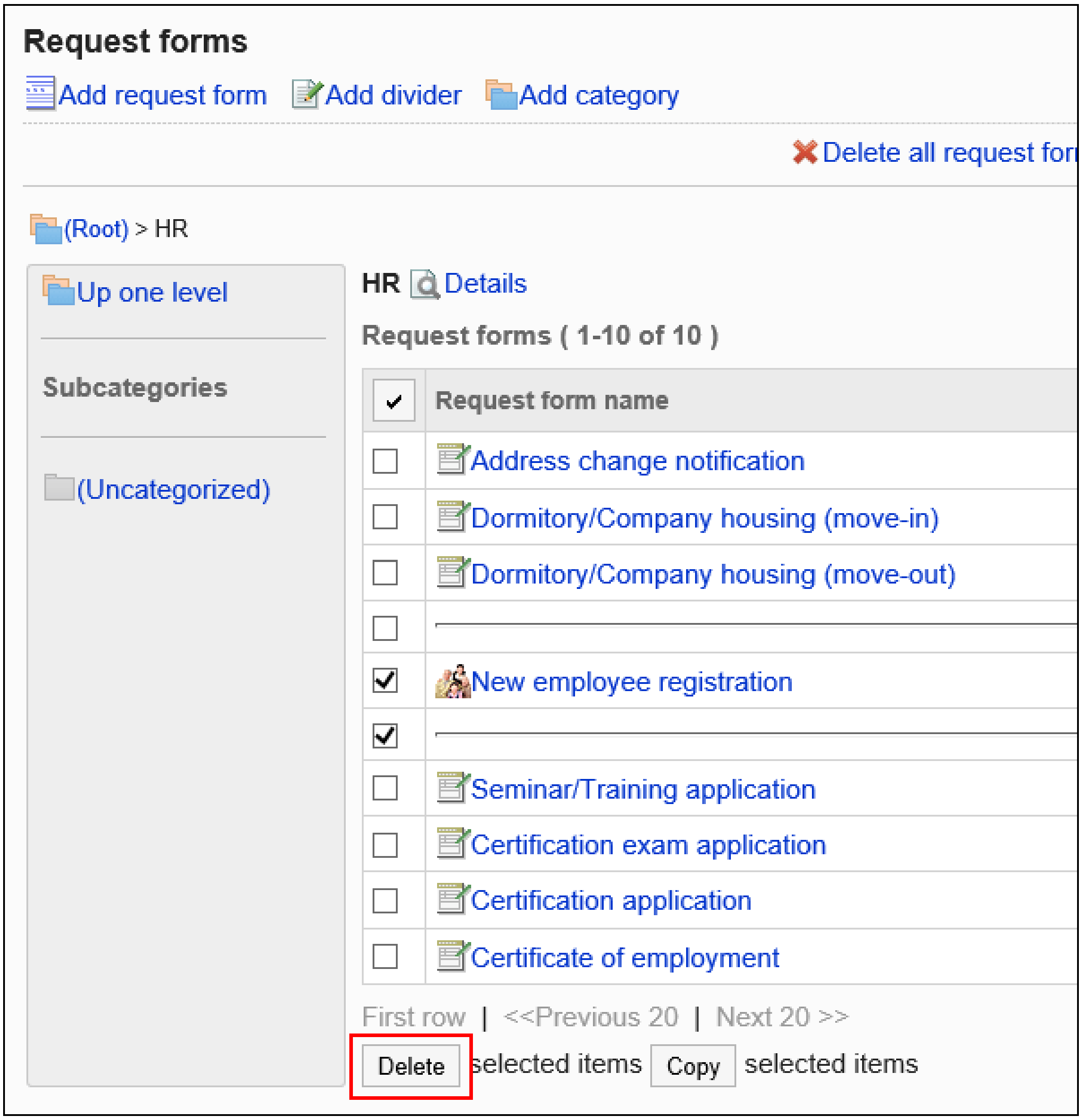
3. Select "Application settings" tab.

4. Click "Workflow".

5. Click "Request Form" list.

6. On the "Request Form" screen, select a category.

7. Select check boxes for the request forms or separator lines to delete, and then click "Delete".



8. **Click "Yes" on the screen to delete request forms and separator lines in bulk.**

Deleting All Request Forms and Dividers in a Category

Delete all request forms and separator lines in a category.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

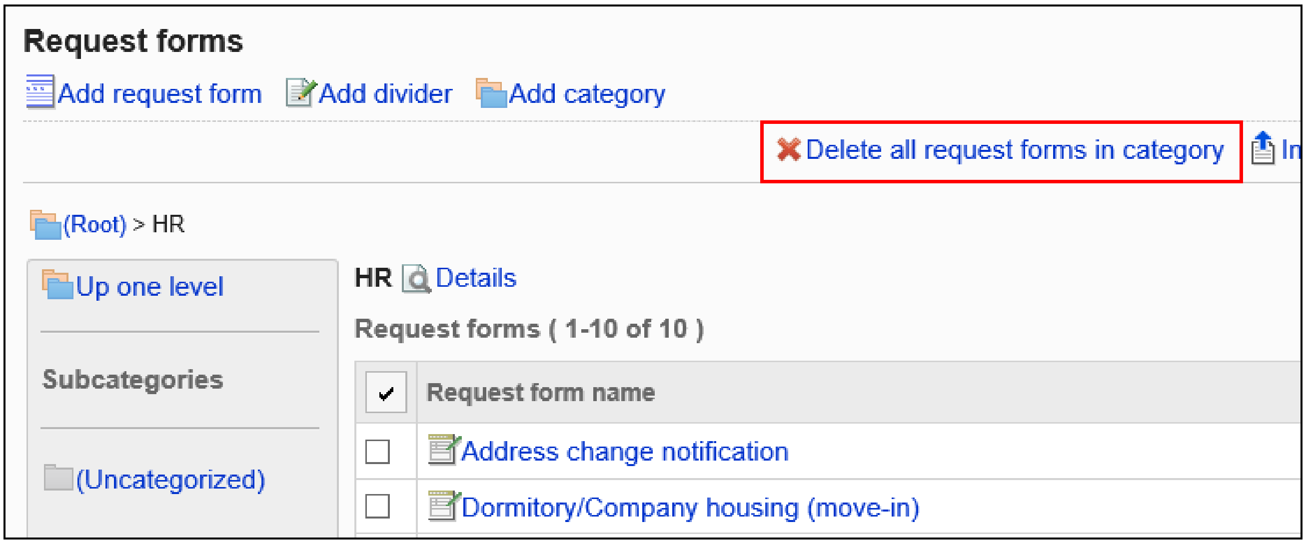
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

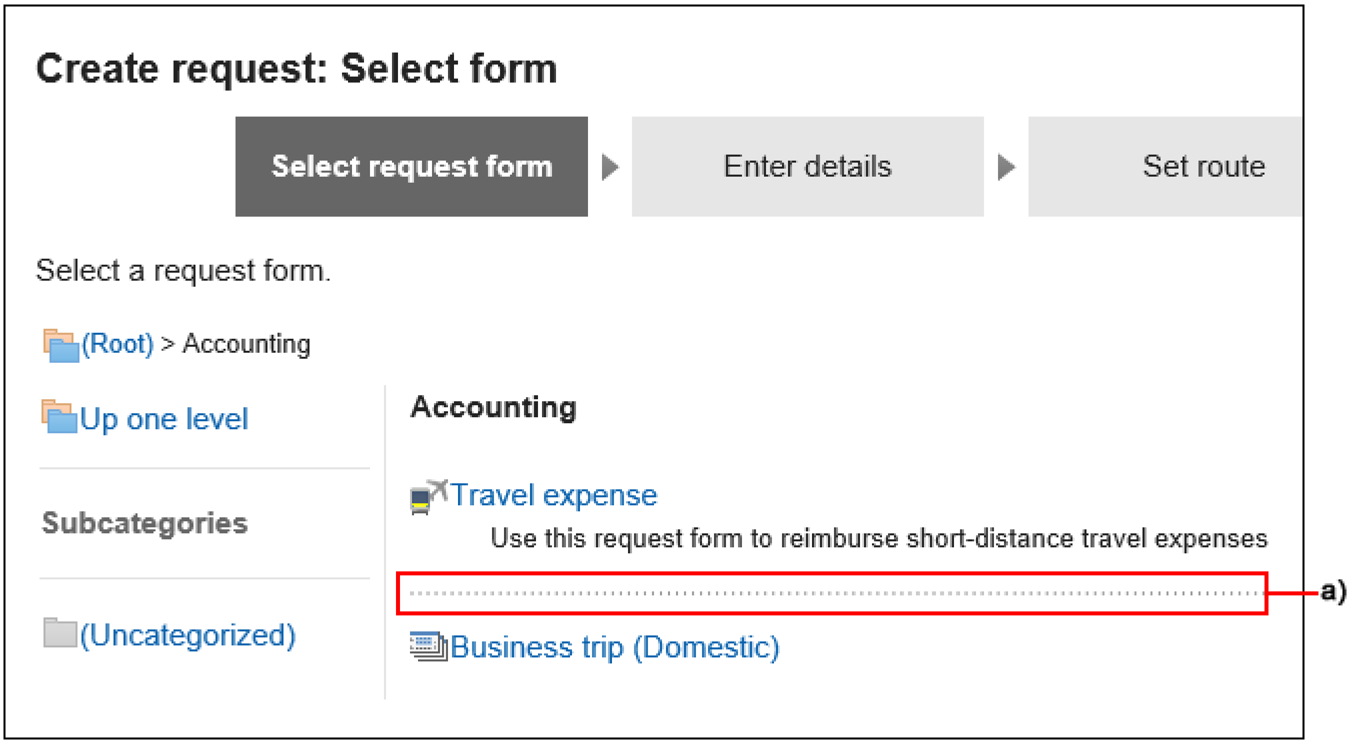
6. **On the "Request Form" list screen, select a category, and then click to delete all request forms in the category.**



7. **Click "Yes" on the screen to delete all request forms in a category.**

2.13.5.8. Setting up Request Form Lists

On the "Request Form" screen, you can add a separator line for each category to organize the view of the list and reorder the requests.
The order in which separator lines and request forms are displayed is also applied to the screen to create request forms of users.



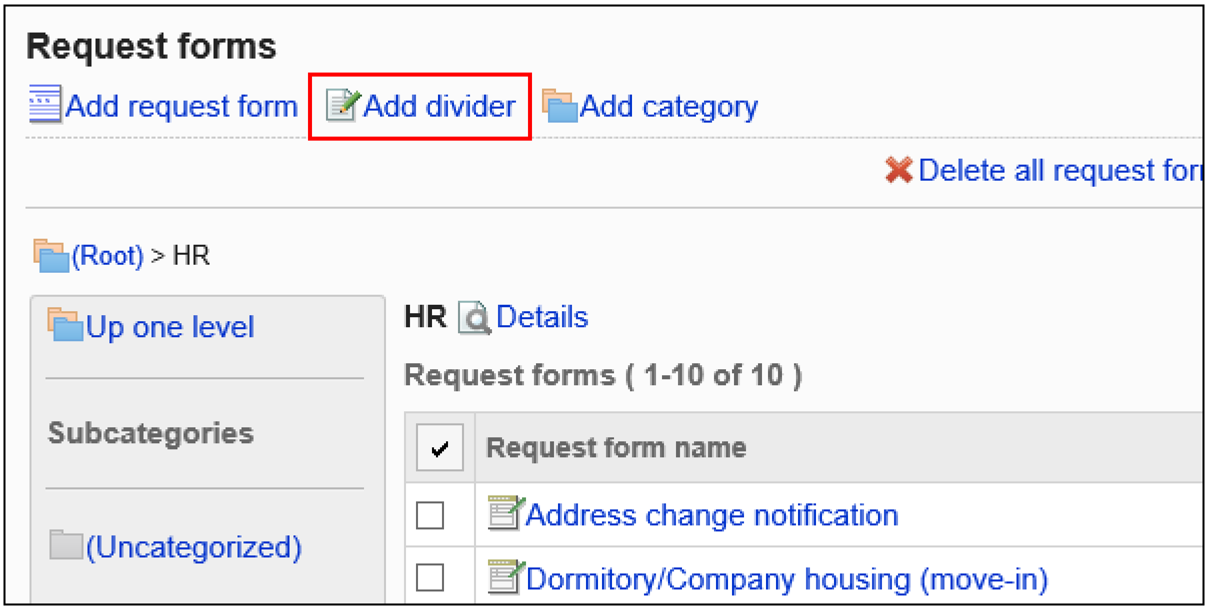
a): Dividers

Adding a Dividers to Request Form List

Add a separator line to the request form list.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click to add a separator.**



7. Click "Yes" on the add separator lines screen.

The added separator lines are displayed at the bottom of the list.

Change the position of separators as needed.

Reordering Request Forms

You can change the order of request form and separator lines in the request form.

Steps:

1. Click the administration menu icon (gear icon) in the header.

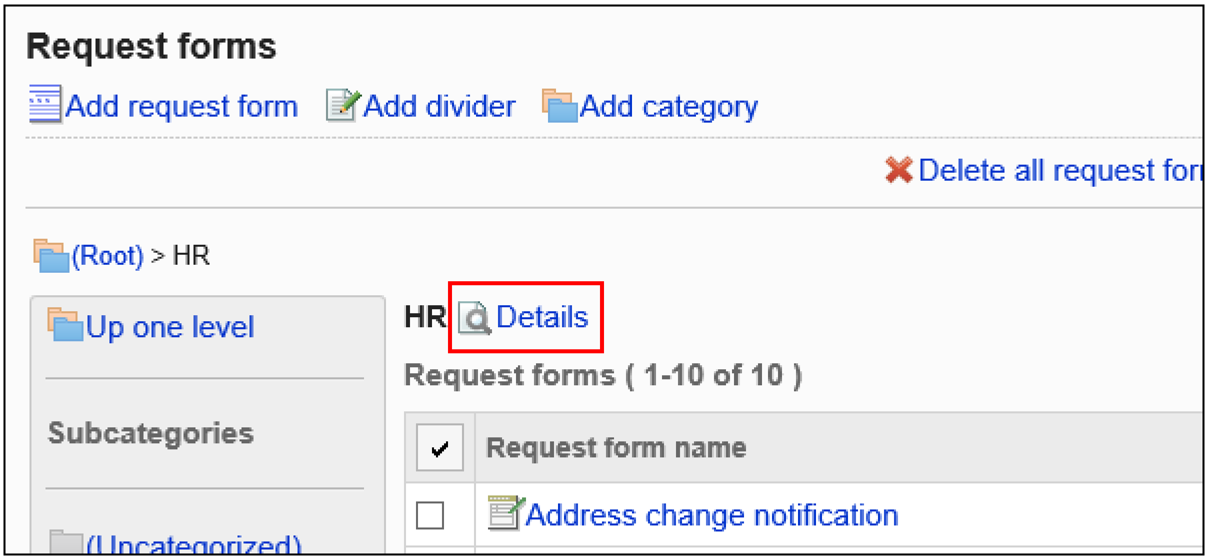
2. Click "System settings".

3. Select "Application settings" tab.

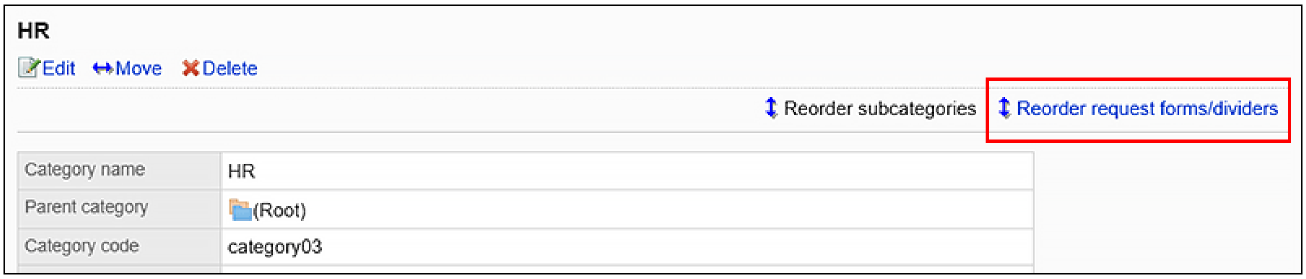
4. Click "Workflow".

5. Click "Request Form" list.

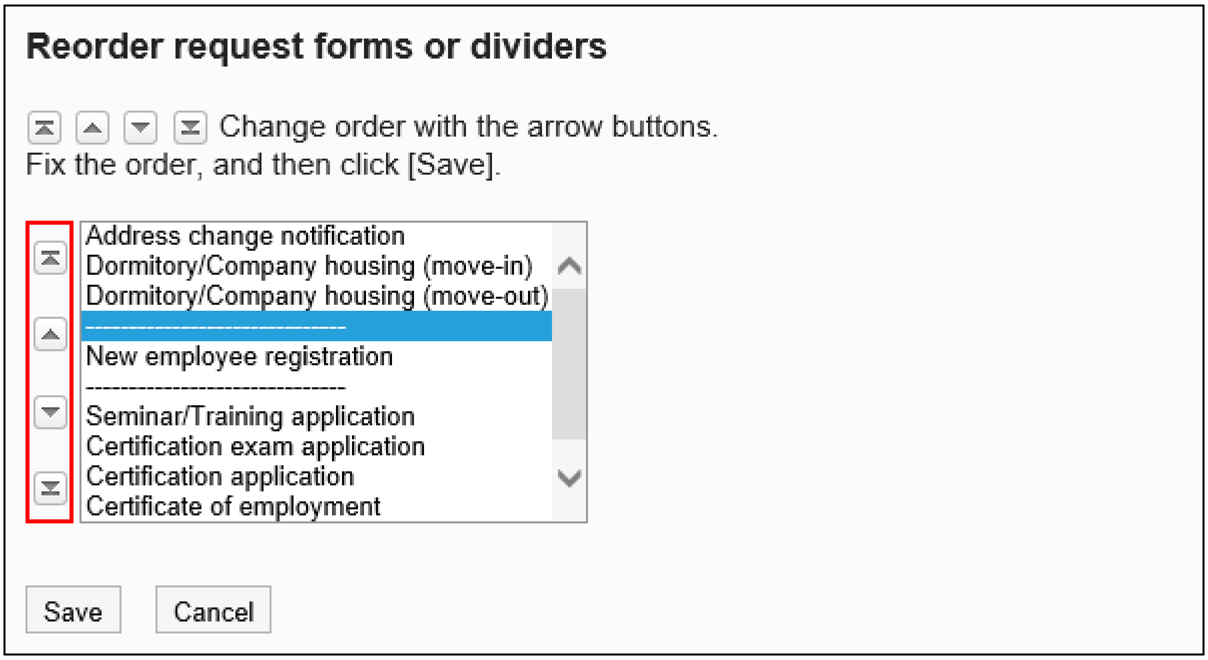
6. On the "Request Form" list screen, select a category and click "Details".



7. **On the screen for category details, click the item to reorder request forms/separator lines".**



8. **On the screen to reorder request forms and separator lines, change the order of them.**



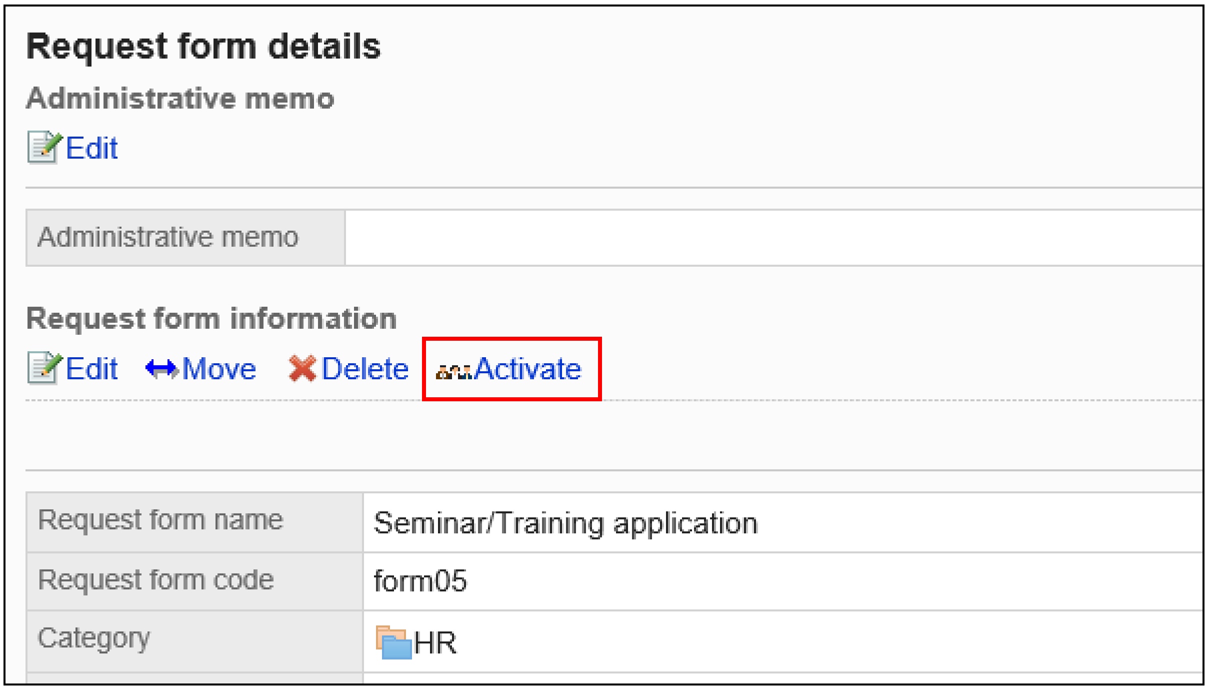
9. Confirm your settings and click "Save".

2.13.5.9. Enabling Request Forms

Make the request form available to users.
If a request route has not been set, the request form cannot be enabled.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category and click the request form name of the request form to enable.**
7. **On the screen for request form details, click "Enable" in the request form information.**



8. **Click "Yes" on the "Enable Request Form" screen.**

Disabling Request Forms

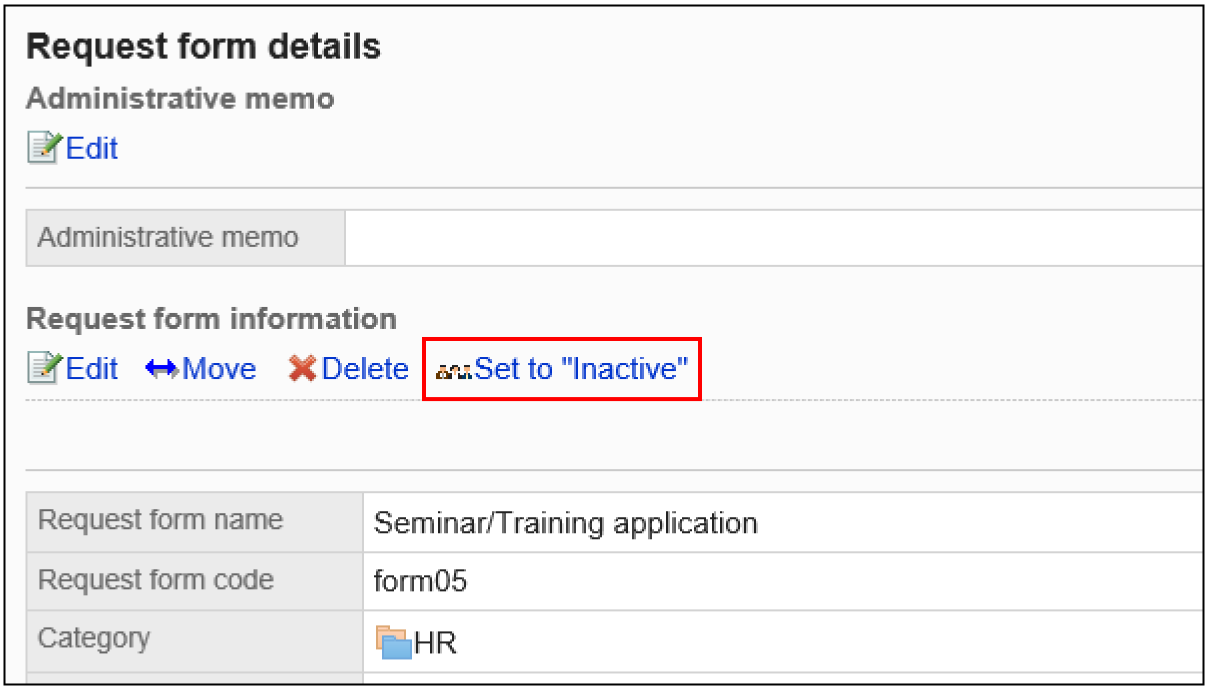
Make the request form inactive.

A request form that has been disabled does not appear on the user screen.

You can still continue to process the on-going request data and the sent-back request data even if you disabled the request form.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to disable.**
7. **On the screen for request form details, click "Disable" in the request form information.**



8. **Click "Yes" on the "Enable Request Form" screen.**

2.13.6. Setting up Items in Request Forms

The fields in the request form are entered in the Request form. By selecting an input type and adding an item, you can create a request form.

References

- Adding Request Forms(1326Page)
- Adding Items(1358Page)
- Type of item(1359Page)
- Previewing Request Forms(1395Page)

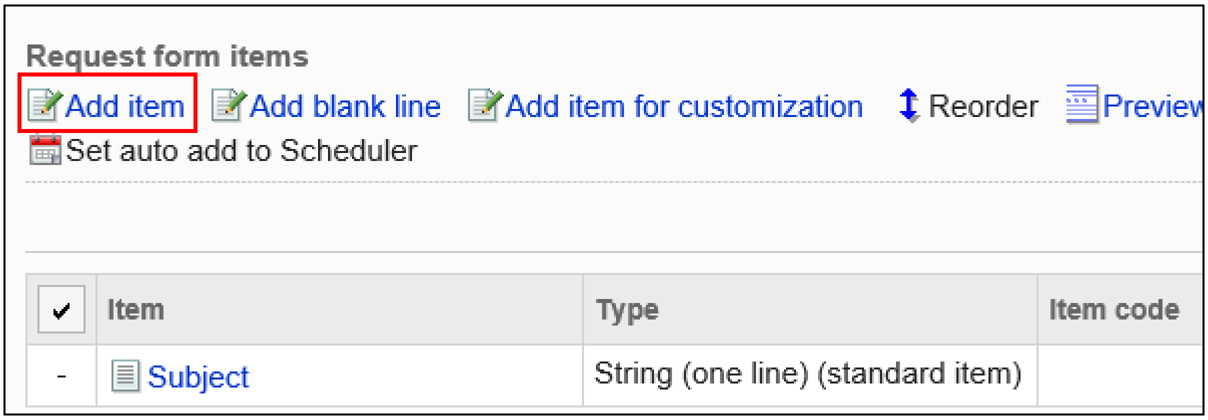
- Enabling Request Forms(1355Page)

2.13.6.1. Adding Items

Add an item to the request form.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to add items.**
7. **On the screen for request form details, click "Add Item" in the request form list.**



8. **On the screen to add items, select an item type in "Type" field.**

The following types can be selected:

- String (one line)

- String (multiple lines)
- Menu
- Radio button
- Check box
- Number
- Auto Calculation
- Date
- Attachment
- Route navigation

9. Set the required items according to the type selected in step 8.

For details, refer to Item Types(1359Page).

10. Confirm your settings and click "Add".

11. On the preview screen, check the displayed items.

For details, refer to Previewing Request Forms(1395Page).

2.13.6.2. Item Types

This section describes the types of items that can be set for a request form.

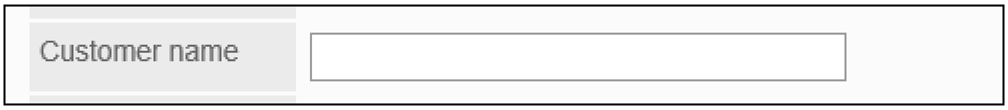
Setting items differ depending on the input type.

Note

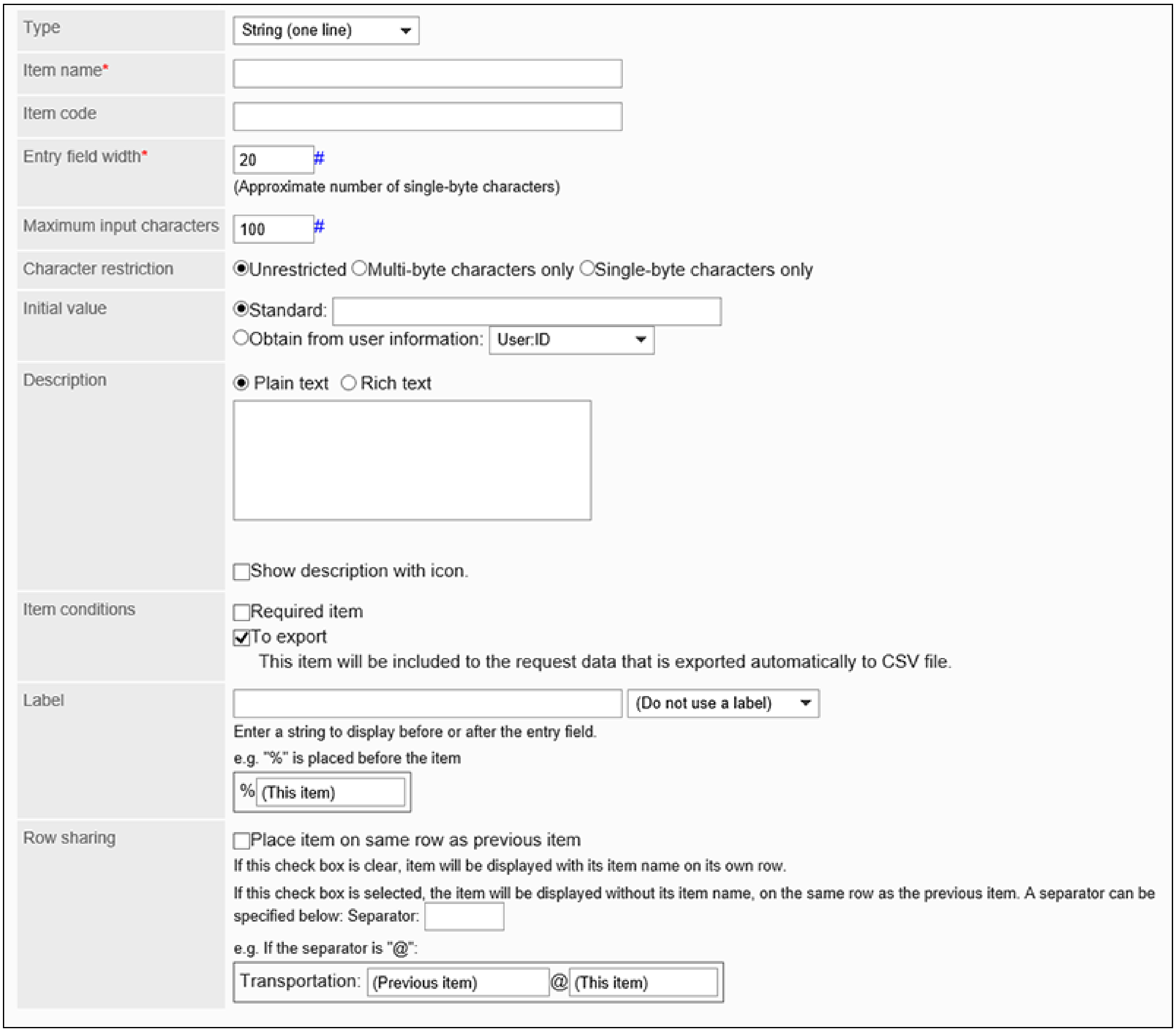
- After you have added an item, you can set the access right for the item, if necessary.
  For details, refer to Setting Access Permissions for Items(1391Page).

String (One Line)

String (one line) is an entry for text in one line. You cannot enter line breaks in it.



The setting fields are as follows:



Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Input width</td><td>Enter the number of characters in single-byte.
The number in this field indicates the approximate number of characters. The maximum number of characters can be entered in one line varies depending on the Web browser and characters you enter.</td></tr>
<tr><td>Maximum number of characters</td><td>Enter the maximum number of characters that can be entered. There is no distinction between double-byte characters and single-byte characters.</td></tr>
<tr><td>Limits</td><td>You can limit the characters to be entered in double-byte or single-byte only.</td></tr>
<tr><td>Default value:</td><td>Set the default value to one of the following

Direct input:
Enter characters.
User information:
Select from the following:

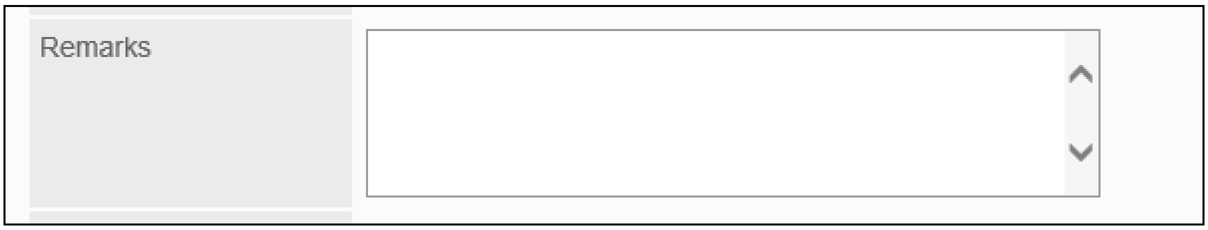
User:ID
A user ID for Garoon.
User:Name
User:Login name
User:Pronunciation
User:E-Mail
User:Contact
User:URL
User:Notes
User:Position
User:(Item name of a custom item)
Only displayed when the custom items(92Page) are configured.

</td></tr>
<tr><td>Description</td><td>Enter a description of the item. You can use Rich Text Formatting.
To display the description on a separate screen, select the "show description with icon" check box.</td></tr>
</table>

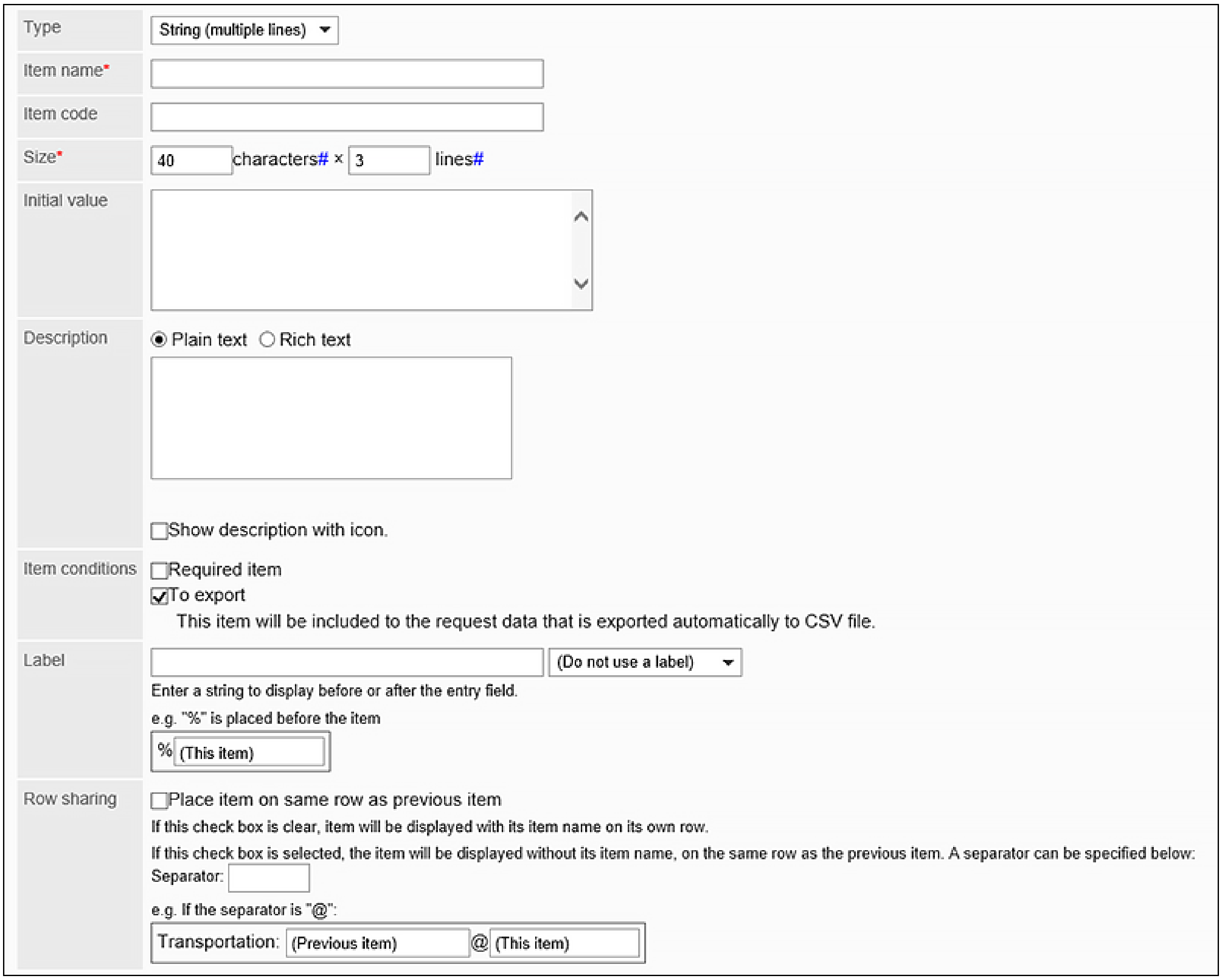
Item	Description
	 The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required fields: Set whether or not to be a required item. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

String (Multiple Lines)

String (multiple lines) is an entry for a long sentence in multiple lines. You can enter line breaks in it.



The setting fields are as follows:

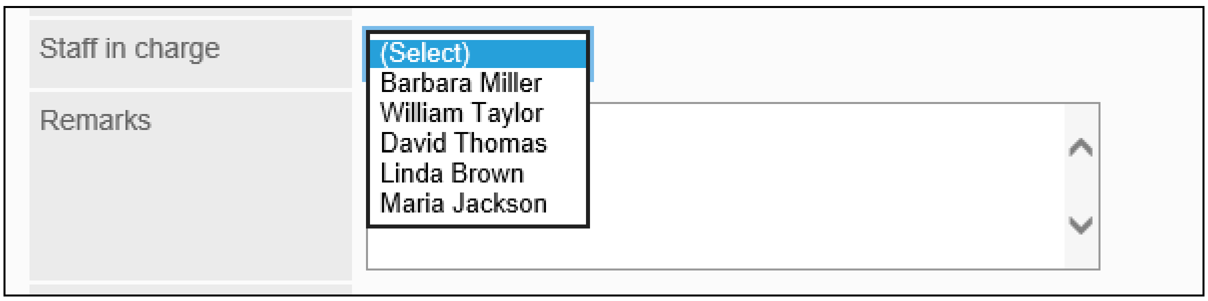


Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Size	Specify the number of digits (width) and rows (height) of the input field. The number of characters per line and the number of lines per field are approximate values. The maximum number of characters can be entered in one line and the maximum number of lines per filed vary depending on the Web browser and the character you are using.

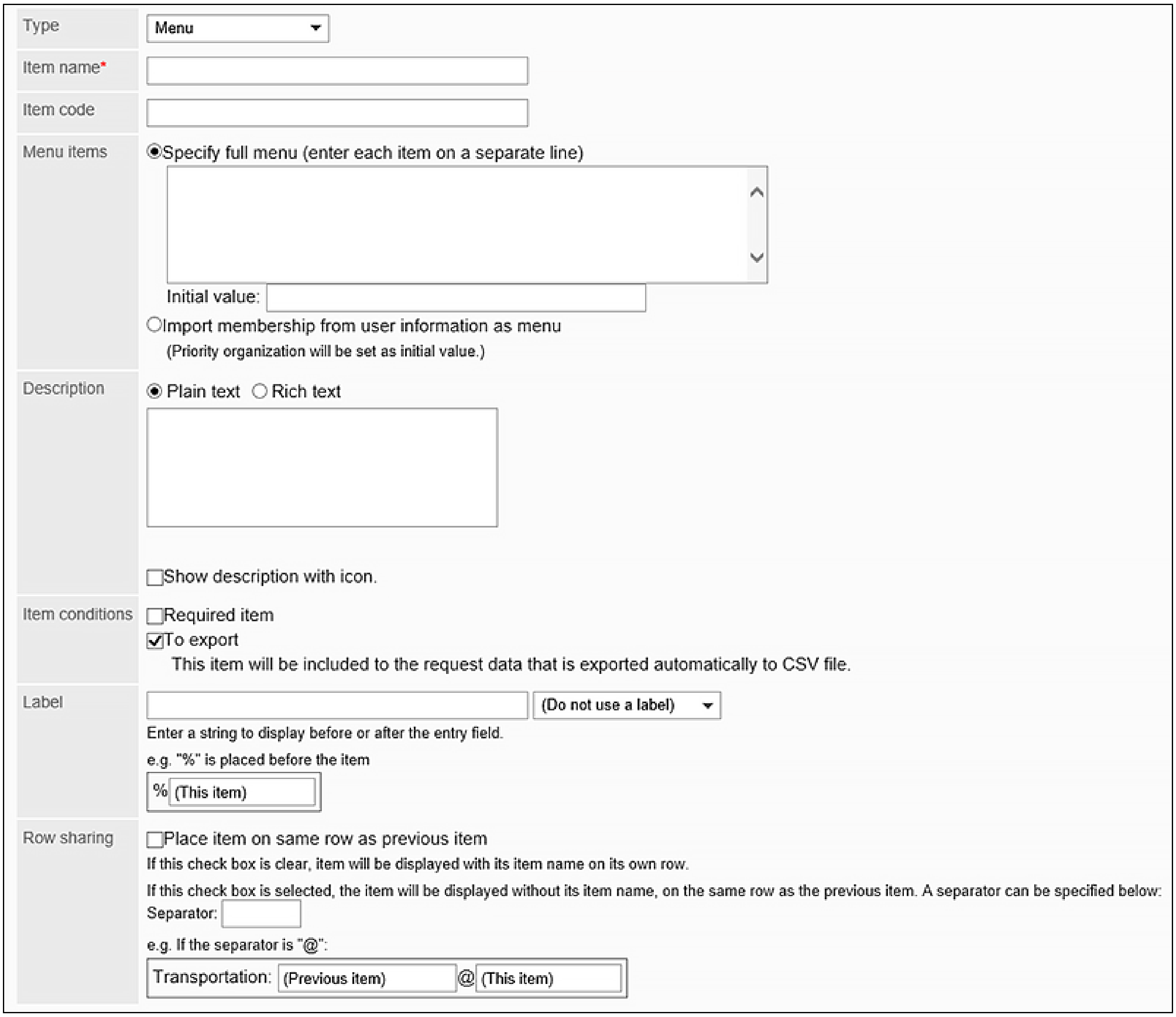
Item	Description
Default value:	You can preset a text to be displayed.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Menu

Menus are items displayed in a drop-down list.



The setting fields are as follows:



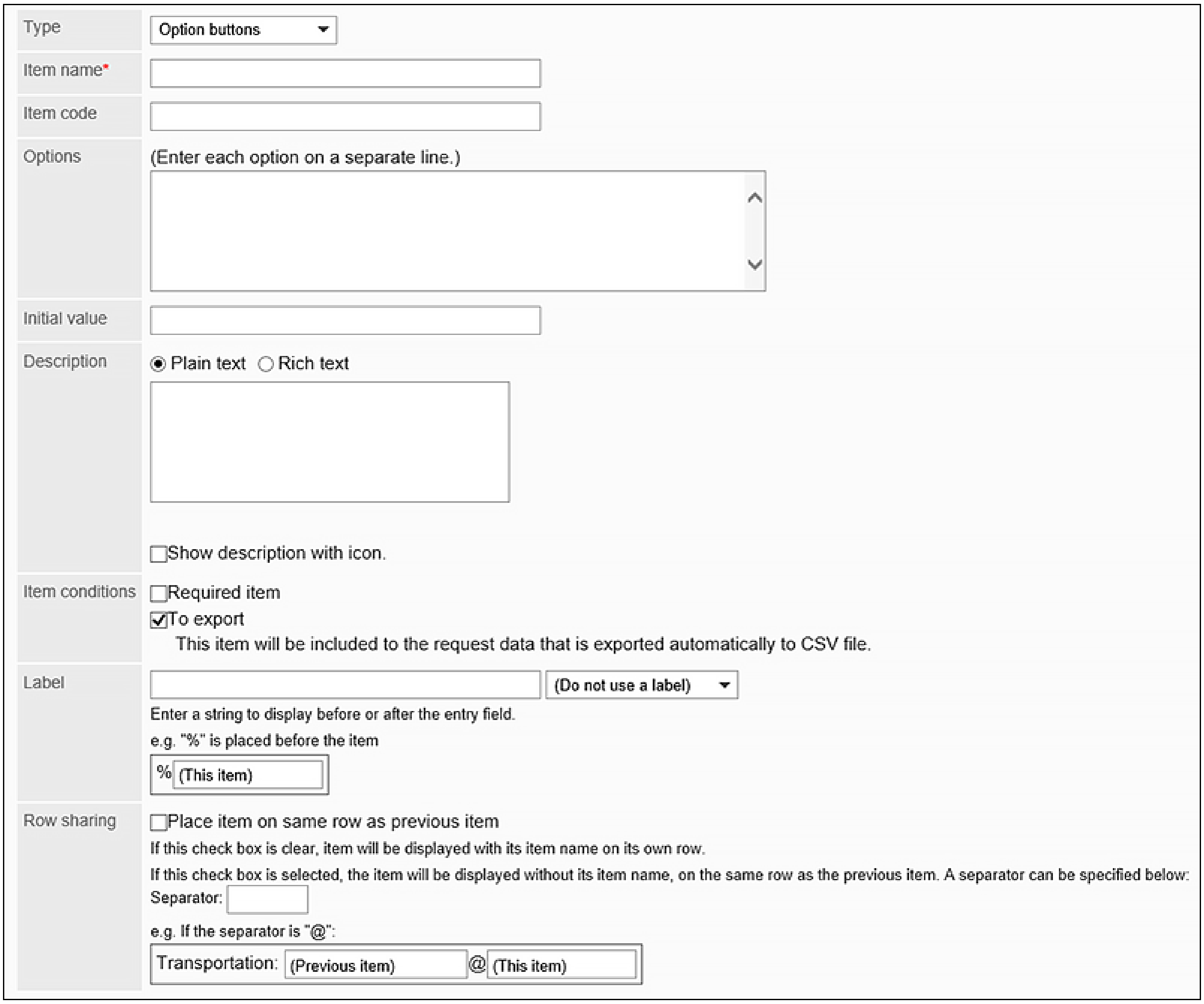
Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Menu item	For a menu item, you can set one of the following: • Direct input: Enter one item per line. You can set the default value.

Item	Description
	• Organization: When the request data is created, the organization belongs to the user information. You cannot set a default value for this field.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Radio Button

Radio buttons are items that display strings as choices in radio button format.

The setting fields are as follows:



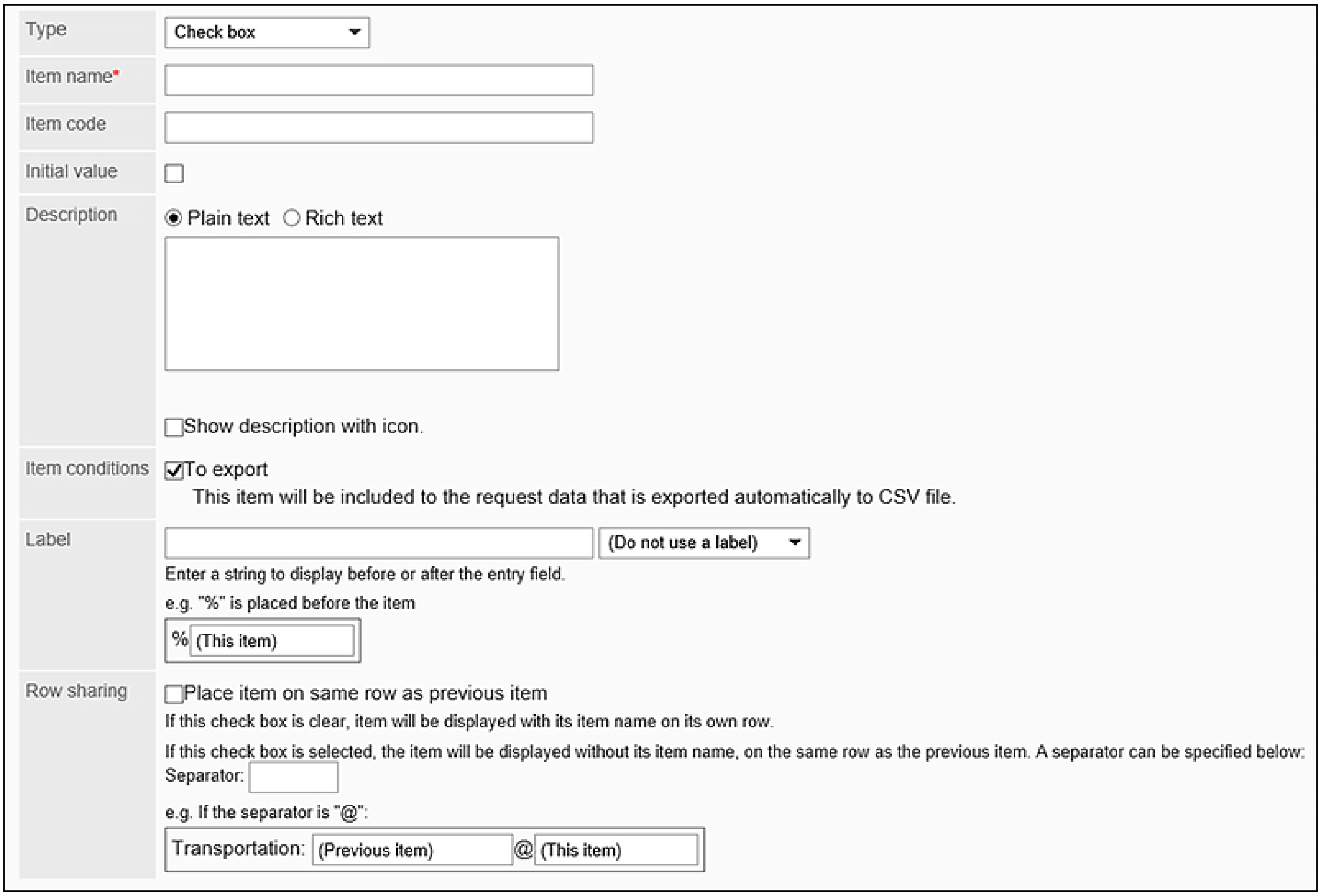
Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Radio item	Enter one item per line.
Default value:	You can set a pre-selected menu.

Item	Description
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Check Box

Check boxes are items that display item names to set as selections in check box format.

The setting fields are as follows:

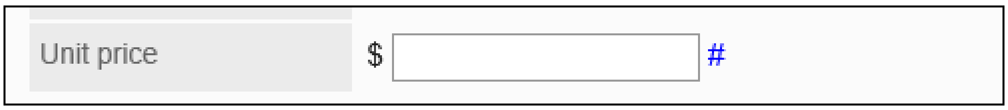


Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Default value:	When you select "Default value", the check box on the user screen appears selected.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.

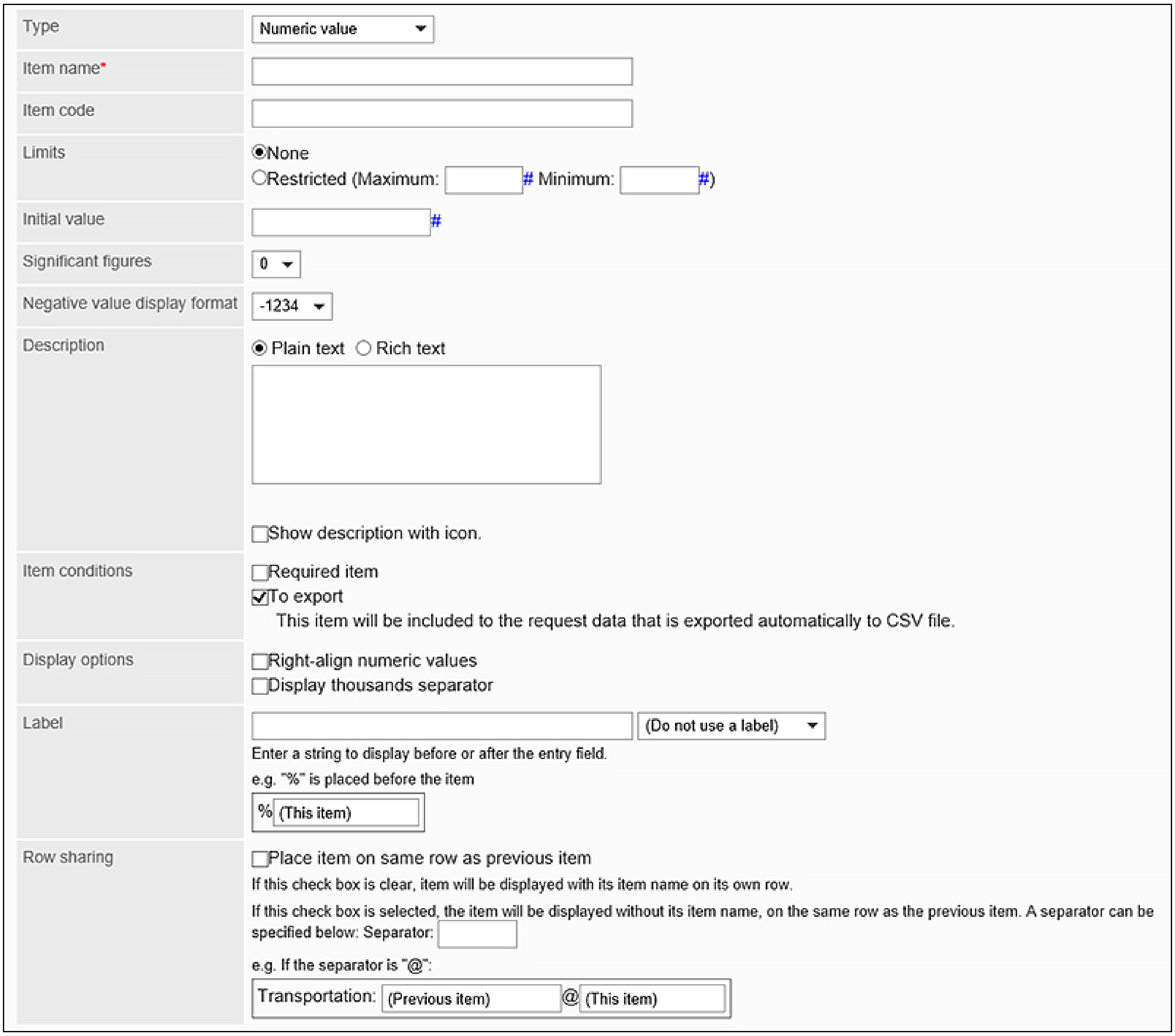
Item	Description
	 The description of the item placed to the right is not displayed on the screen.
Item conditions	If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Number

Numbers are items to enter numbers.



The setting fields are as follows:



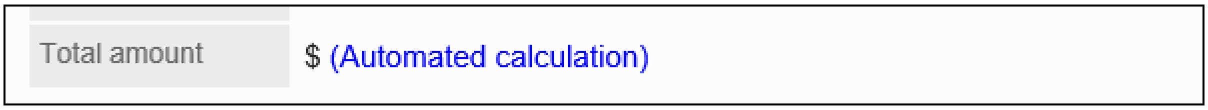
Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Limitation on input	If you set limitations to inputs, select "Limited" and set the maximum value and the minimum value.

Item	Description
Default value:	You can preset a number to be displayed.
Number of decimal places	You can specify decimal digits allowed from 0 to 10 digits.
The way to show negative numbers	Select the way to show negative numbers from the following: • -1234 • ▲1234 • △1234
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Format	You can select the following display methods: • Right-aligned • Use thousands separator
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

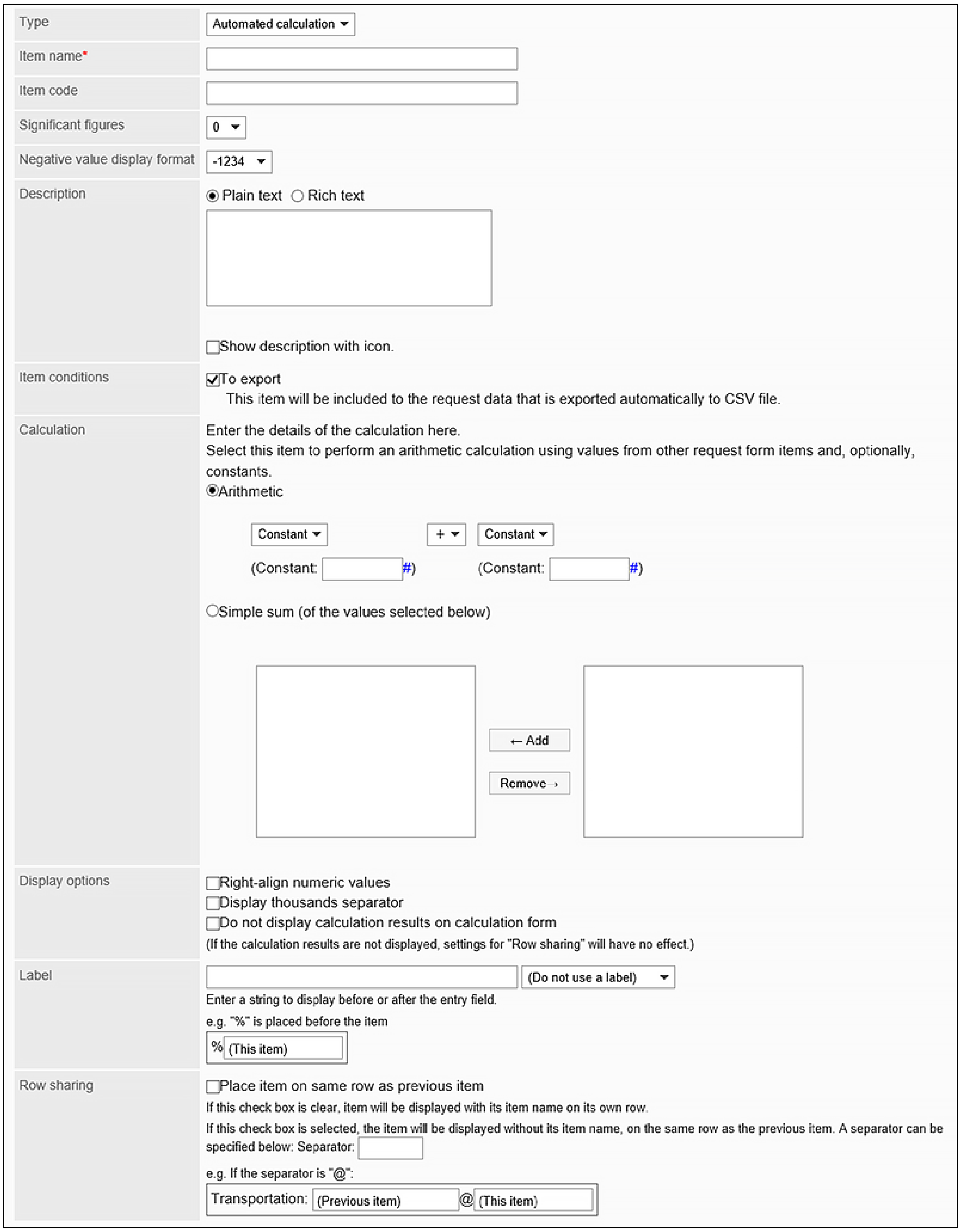
Item	Description
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Auto Calculation

An automatic calculation is an item that displays the results of calculating the value of another item. For example, you can display calculation results such as "unit Price x Quantity".



The setting fields are as follows:



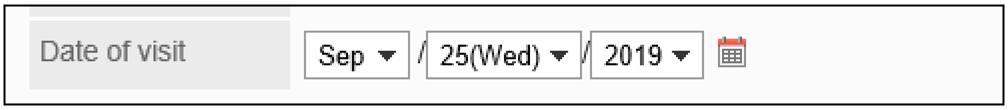
Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the

Item	Description
	first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Number of decimal places	You can specify decimal digits allowed from 0 to 10 digits.
The way to show negative numbers	Select the way to show negative numbers from the following: • -1234 • ▲1234 • △1234
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Calculation details	This item can be calculated for the "number", "Automatic Calculation", and "route navigation linkage" fields that are set before this field. • Arithmetic operations Select an item or a constant and a arithmetic symbol to set the calculation. If you have selected a constant, enter a number in the field. • Total: Calculates the sum of the selected items.
Format	You can select the following display methods: • Right-aligned • Use thousands separator

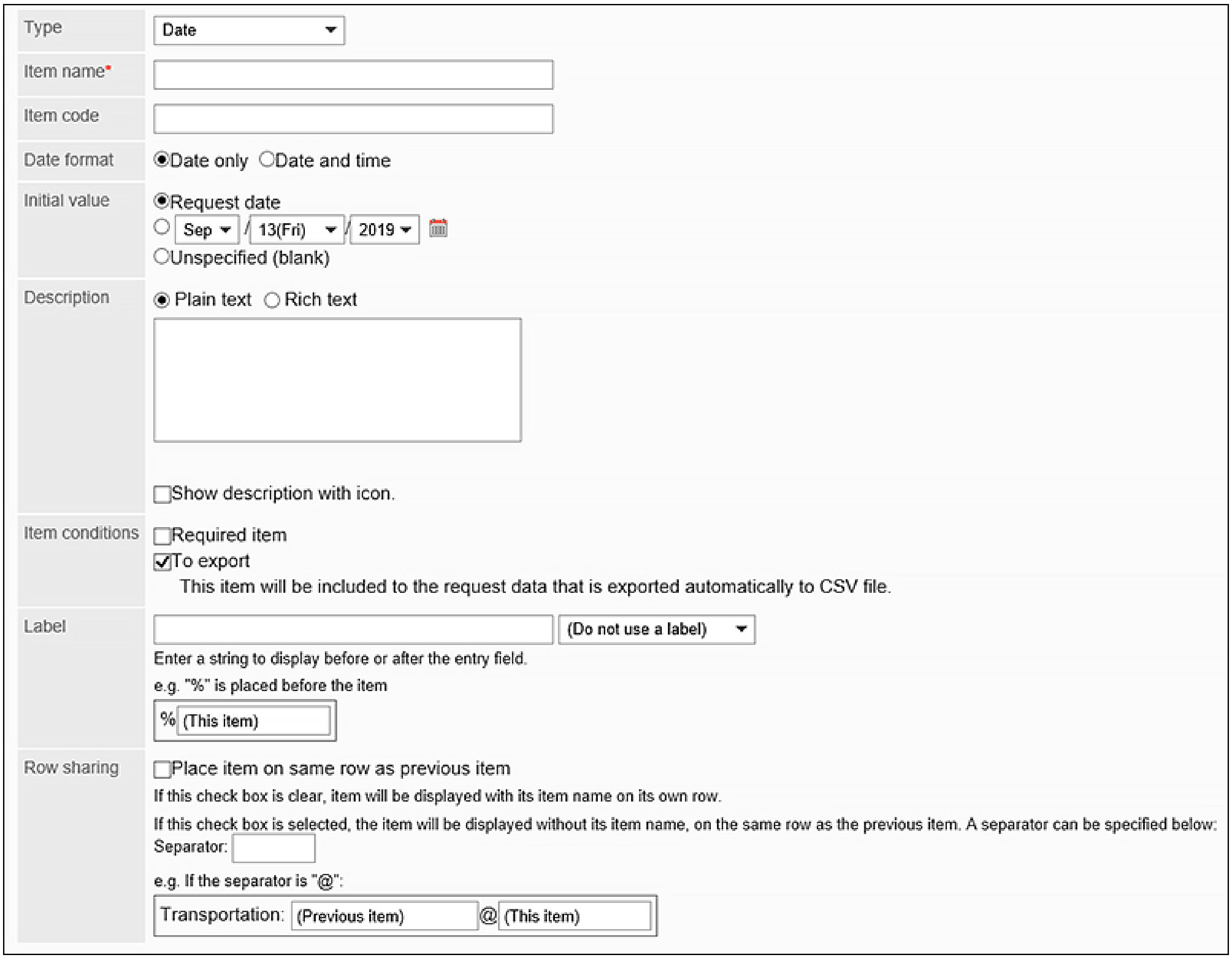
Item	Description
	• Hide calculation results on a request form If you do not want to display the calculation results, you do not need to set "position to the right".
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Date

Dates are items to specify dates in date calendars.



The setting fields are as follows:



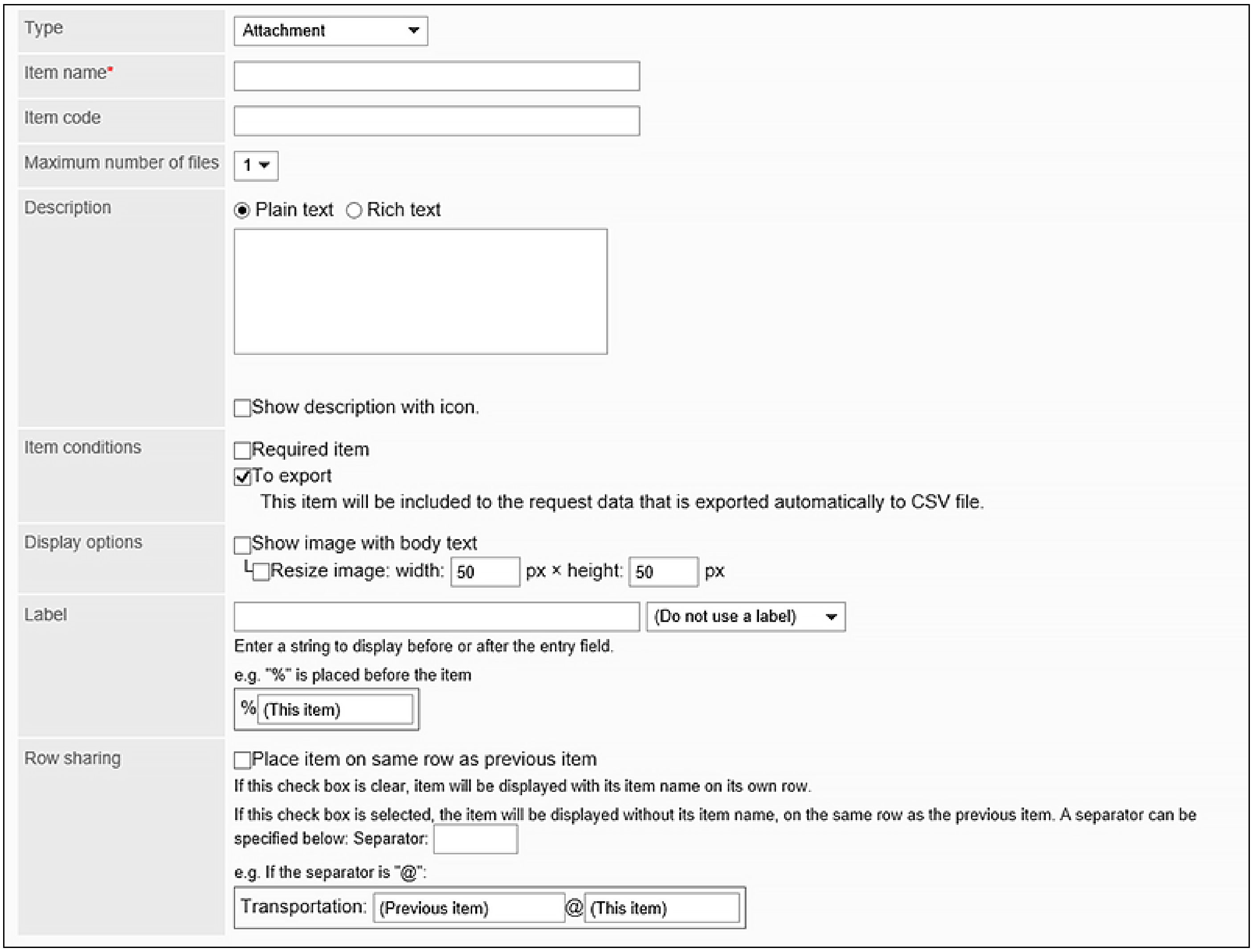
Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Date format	Select one of the following methods • Date only • Date and time
Default value:	Set one of the following as a default value:

Item	Description
	• Enter the current date (date and time) The date and time when the request data was created are set. • Date and time: You can select a date using the calendar picker if it is January 3, 1970, or later. • Do not set: Blank field is displayed.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Attachment

Attachment is an item for attaching a file to the request data.

The setting fields are as follows:

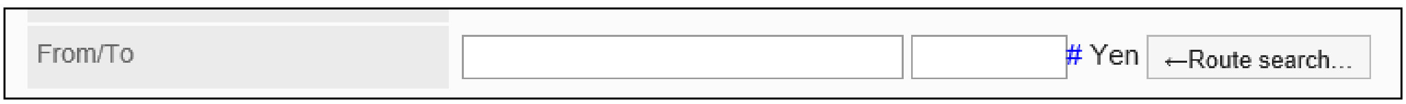


Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Maximum number of files	Set the maximum number of files that can be attached. You can set up to 5.

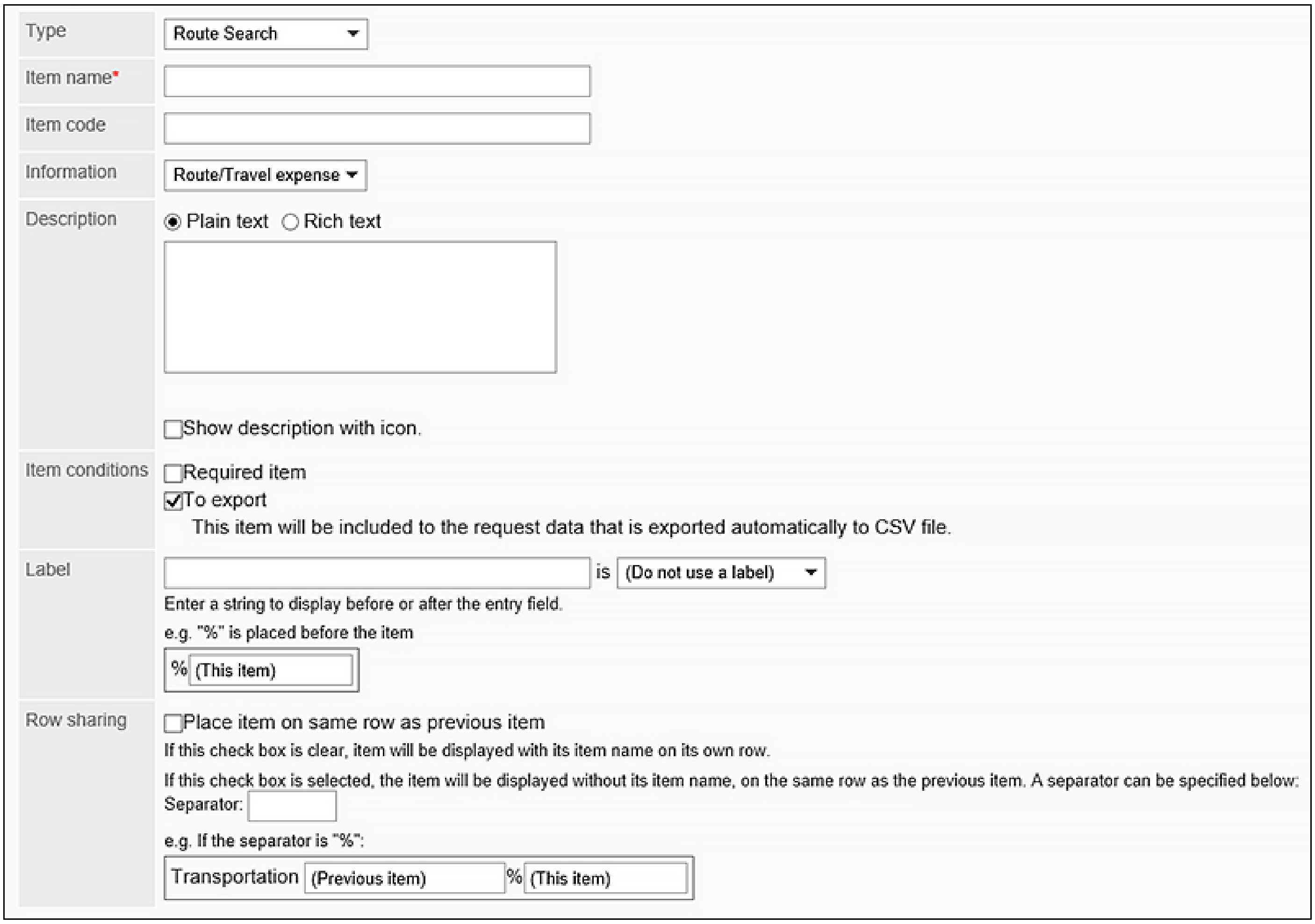
Item	Description
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Format	If you select the check box to show image with body, images are displayed with the body. The images are scaled down to the specified size (in pixels).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

Route Navigation

Route navigation connector is an item to import routes and fares from the route search results of the route navigation Connector service.
This service is available only in Japanese. The routes are displayed in Japan.
To use the route navigation connector, you must enable Cybozu Online Service.



The settings are as follows



Item	Description
Item name	Enter an item name.
Item code	Enter the item code. An item code is a unique code to identify items for JavaScript customization. If you do not use JavaScript customization, you do not need to set item codes. You can enter codes in up to 100 characters. If 101 or more characters are entered, the first 100 characters are registered. You can use single-byte alphanumeric characters, hyphens, and _ (underscores).
Import information	Select from the following fields to import from route search • Route/Fares • Route • Fare
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon"

Item	Description
	check box.  The description of the item placed to the right is not displayed on the screen.
Item conditions	• Required Fields Set whether to be mandatory. • Set as exported items: If you chose to export the request data to a CSV file automatically, you can set whether to include this item in the exported item. For details, see Exporting Request Data to a CSV File Automatically(1485Page).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 
To the right	Determines whether to place the right side of the previous item. Text entered in the "Separator" field is displayed between the previous item.

2.13.6.3. Copying Items

Copy an existing request form and add a new item.

When you create similar items to existing ones, copying them helps you to save time.

You can only copy items from the same request form.

We recommend that you disable the request forms(1356Page) to prevent users from using them while working with them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

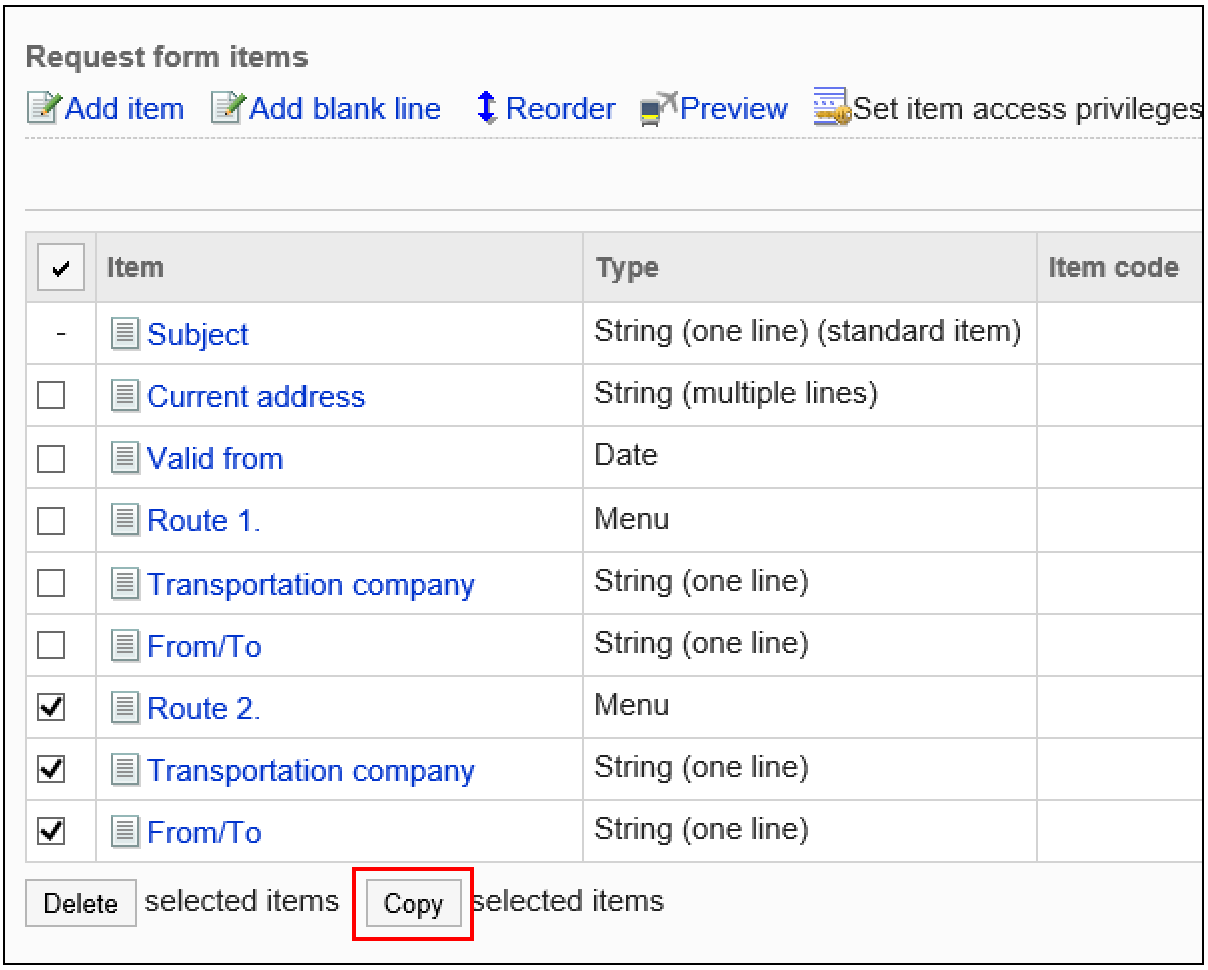
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" screen, select a category, and then click the request form name of the request form from which to copy items.**

7. **In the request form list on the screen for request form details, select the check boxes of the items to copy, and click "Copy".**
   The copied items are added to the bottom of the list of items in the request form.
   The initial value of the item name is "copy of (original item name)".


Request form items

Add item Add blank line Reorder Preview Set item access privileges

✓	Item	Type	Item code
-	Subject	String (one line) (standard item)	
☐	Current address	String (multiple lines)	
☐	Valid from	Date	
☐	Route 1.	Menu	
☐	Transportation company	String (one line)	
☐	From/To	String (one line)	
☑	Route 2.	Menu	
☑	Transportation company	String (one line)	
☑	From/To	String (one line)	

Delete selected items Copy selected items

8. **You can change the settings and display order of the item as needed.**

For details, refer to the following page:

Changing Items(1385Page)

Reordering Items and Empty Lines(1386Page)

9. On the preview screen, check the displayed items.

For details, refer to Previewing Request Forms(1395Page).

2.13.6.4. Adding Empty Lines

Add empty lines to the request form for easier viewing.

We recommend that you disable the request forms(1356Page) to prevent users from using them while working with them.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

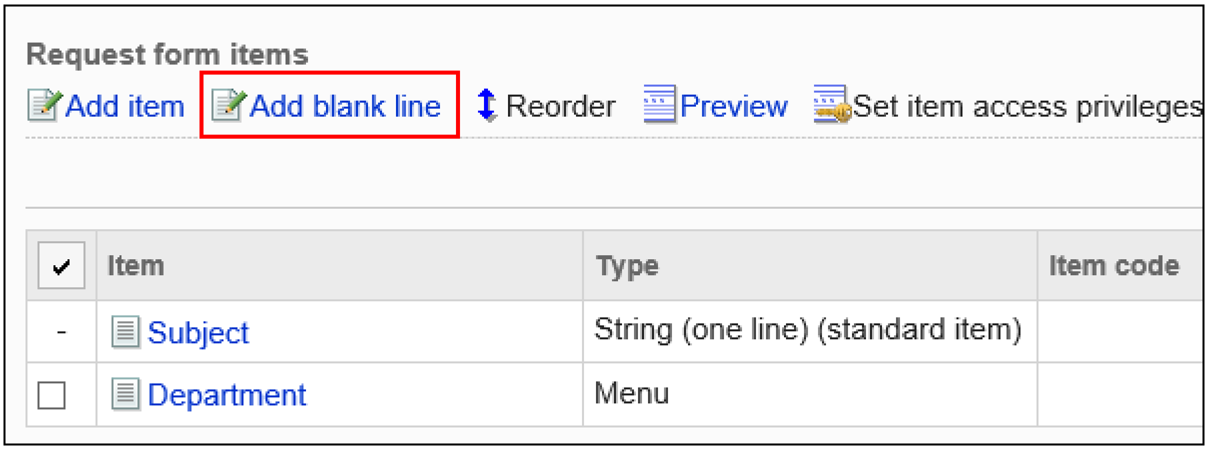
3. Select "Application settings" tab.

4. Click "Workflow".

5. Click "Request Form" list.

6. On the "Request Form" screen, select a category, and then click the request form name of the request form to add empty lines.

7. On the screen for request form details, click "Add Blank Lines" in the request form list.



8. **Click "Yes" on the add empty lines screen.**

Empty lines are added to the bottom of the list of items in the request form.

You can change the order to show the empty lines as needed.

For details, refer to Reordering Items and Empty Lines(1386Page).

9. **On the preview screen, check the displayed items.**

For details, refer to Previewing Request Forms(1395Page).

2.13.6.5. Changing Items

Change settings of items in request forms.

We recommend that you disable the request forms(1356Page) to prevent users from using them while working with them.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

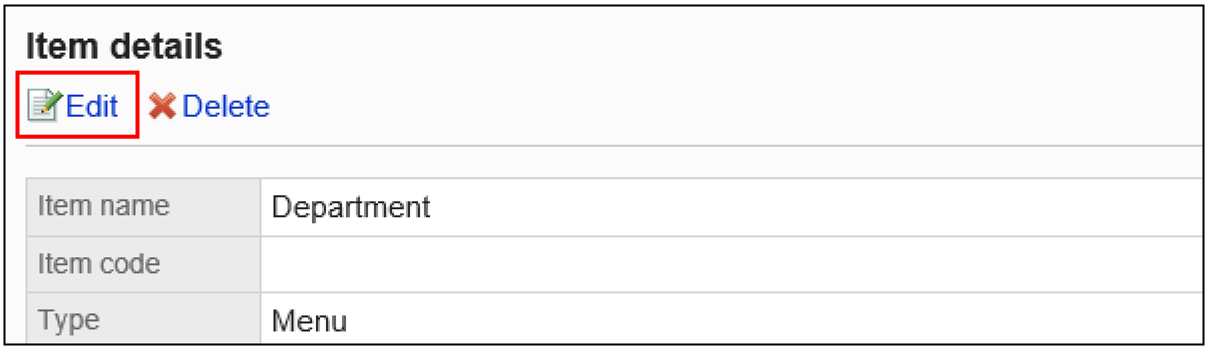
4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. On the "Request Form" screen, select a category, and then click the request form name of the request form to change items.

7. In the request form list on the screen for request form details, click the item name of the item to change.

8. On the item details screen, click "Save".



9. On the screen to change items, set the required items.

For details, refer to Item Types(1359Page).

10. Confirm your settings and click "Save".

11. On the preview screen, check the displayed items.

For details, refer to Previewing Request Forms(1395Page).

2.13.6.6. Reordering Items and Empty Lines

Change the order of items and empty lines in the request form.
We recommend that you disable the request forms(1356Page) to prevent users from using them while working with them.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

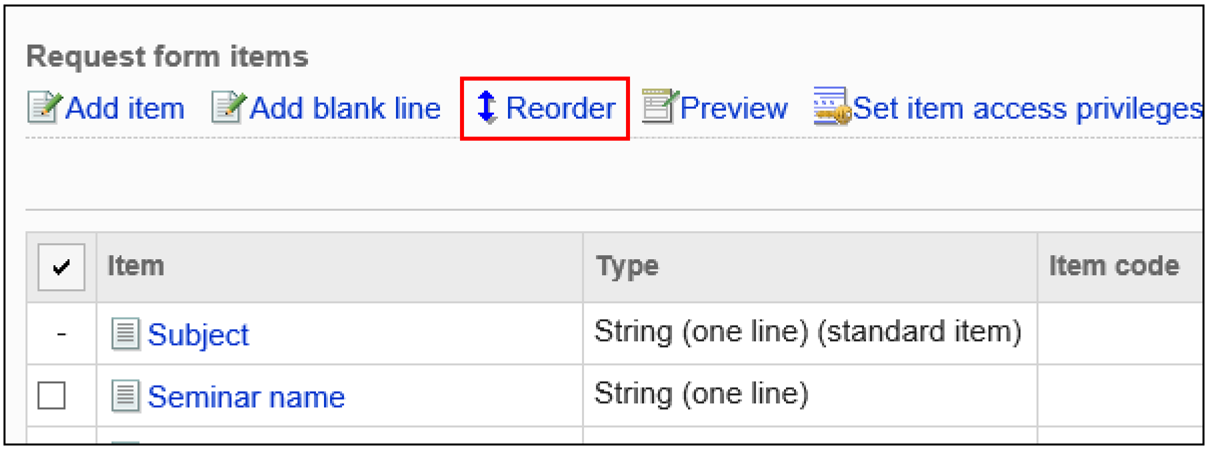
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

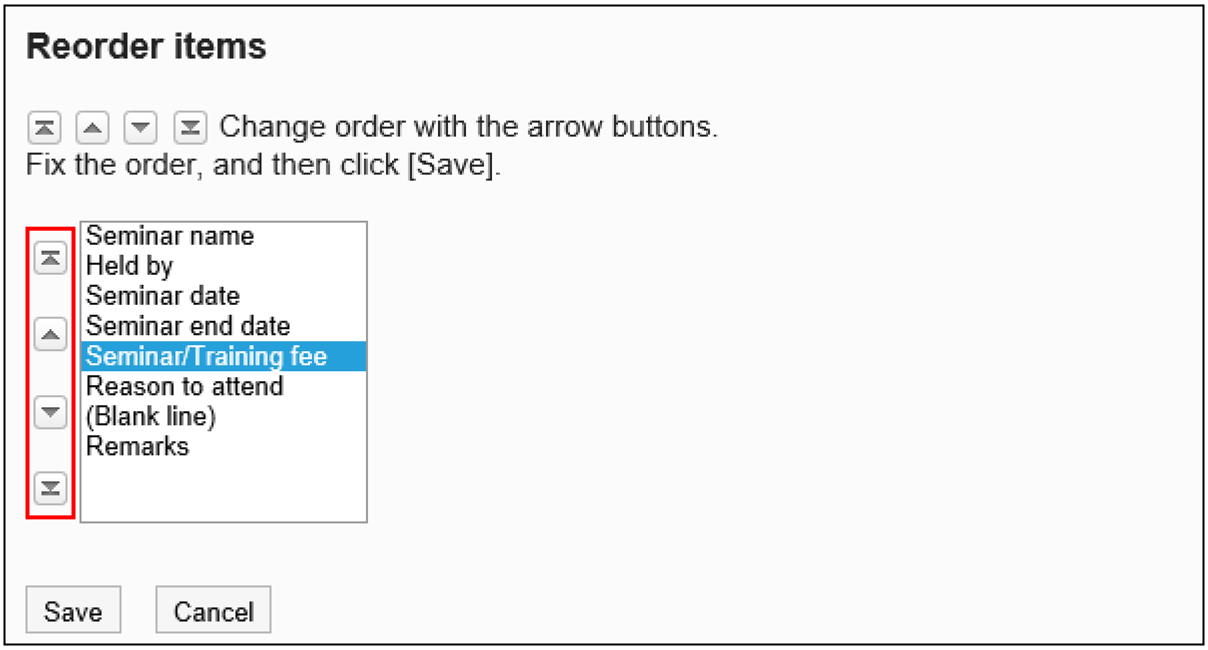
5. **Click "Request Form" list.**

6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to reorder the items and empty lines.**

7. **On the items list of the Request Form in "Request form Details" screen, click "Reorder".**



8. **On the screen to reorder items, change the order to display the items and empty lines.**



9. **Confirm your settings and click "Save".**

10. **On the preview screen, check the displayed items.**

For details, refer to Previewing Request Forms(1395Page).

2.13.6.7. Deleting Items and Empty Lines

Delete the fields and empty lines in the request form.

If you delete an item that has been set as "route branching information", the route branching settings are also deleted.

The "Applicant" field that is not displayed in "Subject" and "Item list in the request form" cannot be deleted.

We recommend that you disable the request forms(1356Page) to prevent users from using them while working with them.

Caution

- Deleted Items and empty lines cannot be restored.

Deleting Items One by One

Delete Items one at a time.

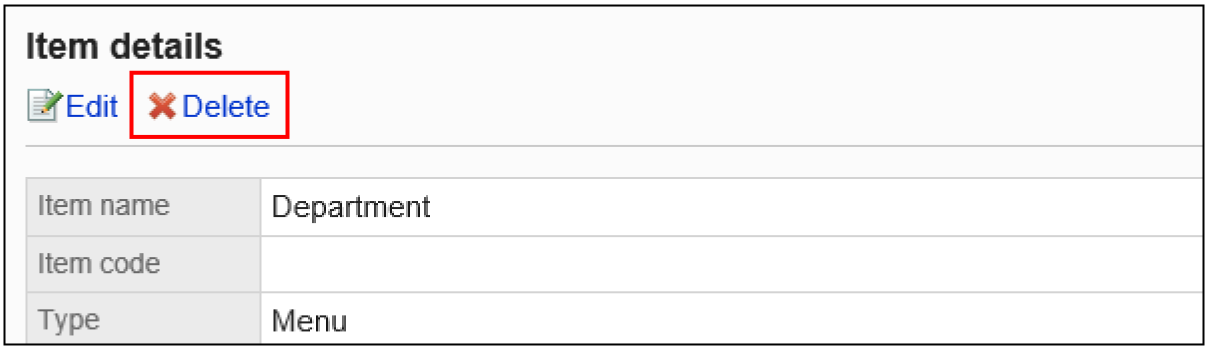
To delete empty lines, refer to Deleting Multiple Items and Empty Lines in Bulk(1389Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to delete items.**

7. **In the request form list on the screen for request form details, click the item name of the item to delete.**

8. **On the item details screen, click "Delete".**



9. **Click "Yes" on the screen to delete items.**

10. **On the preview screen, check the displayed items.**

    For details, refer to Previewing Request Forms(1395Page).

Deleting Multiple Items and Empty Lines in Bulk

Select multiple items or empty rows to delete them at once.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

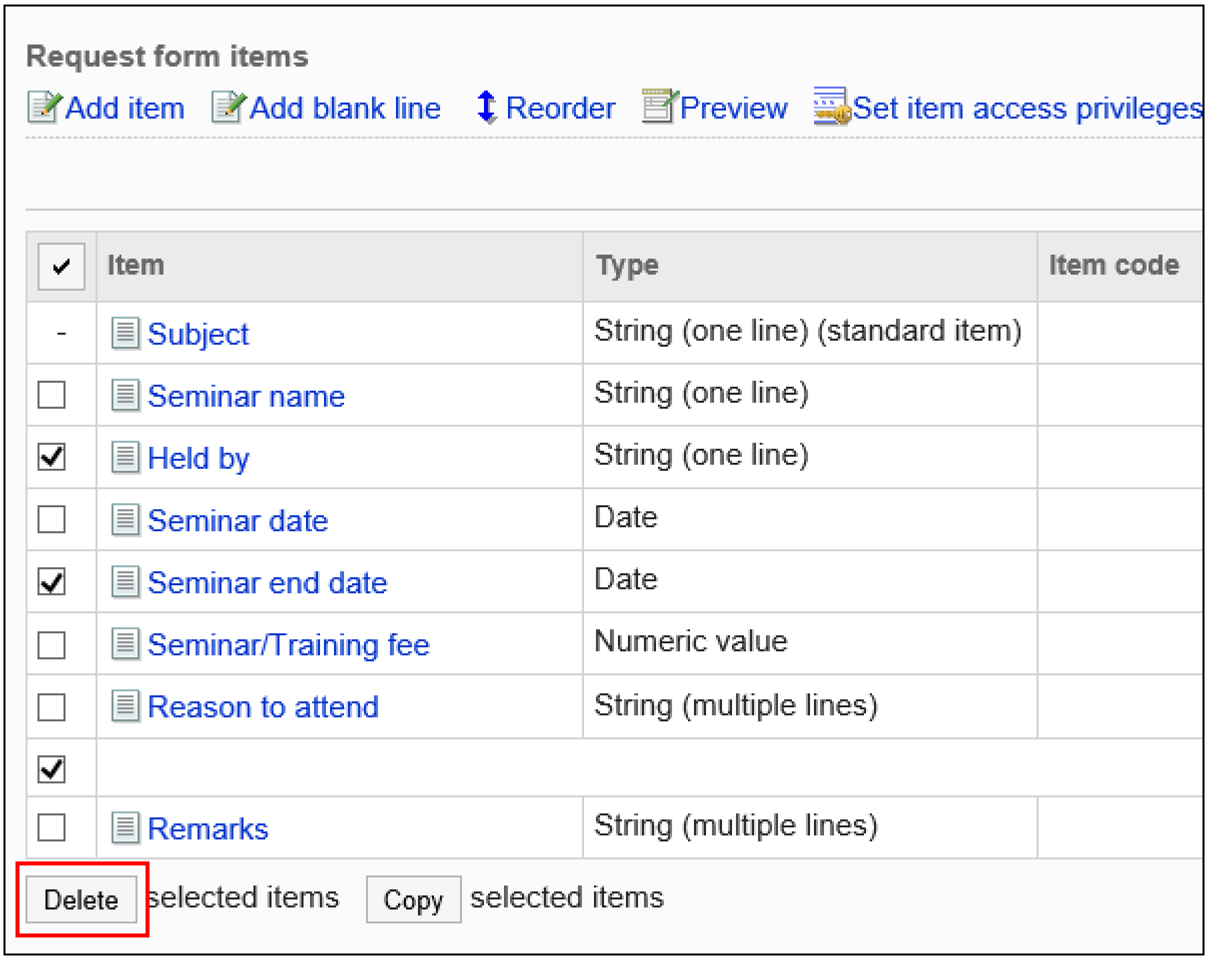
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to delete items and empty lines.**

7. **In the request form list on the screen for request form details, select the check boxes of the fields and empty lines to delete, and then click "Delete".**



8. **Click "Yes" on the Delete all items screen.**

9. **On the preview screen, check the displayed items.**

For details, refer to Previewing Request Forms(1395Page).

Deleting All Items and Empty Lines in the Request Form

Delete all items and empty lines in the request form.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

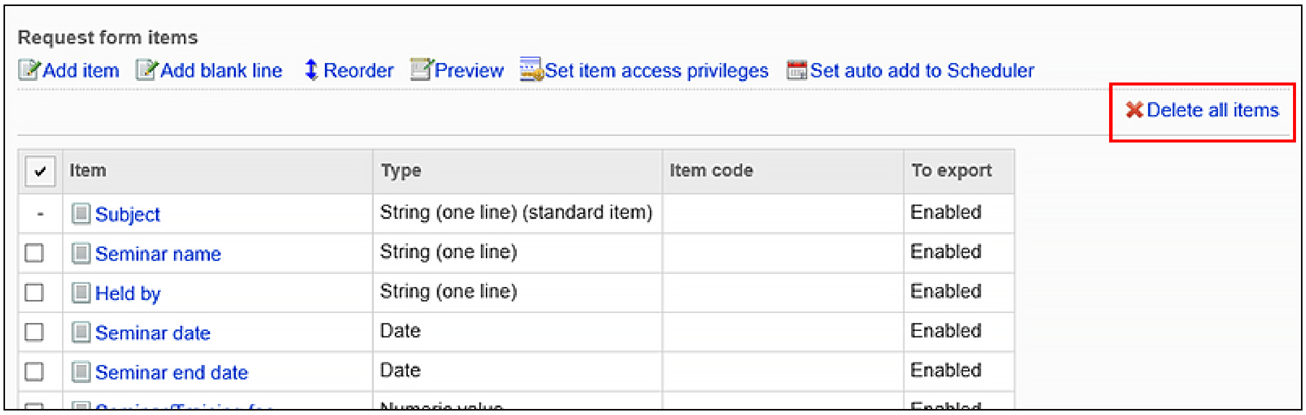
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to delete items and empty lines.**

7. **On the screen for request form details, click the item to delete all items in the request form in the request form list.**



8. **Click "Yes" on the screen to delete all items.**

2.13.6.8. Setting Access Permissions for Items

You can select whether to allow users to view or change the values entered in the fields for each step of the route in the request.
User rights for items can be set only for approval routes.

Item Types for Which User Rights Can Be Set

- String (one line)
- String (multiple lines)
- Date
- Number:
  However, if one of the following conditions is true, the user rights cannot be set
  - The "Number" field is specified as an item for the route branching.
  - The "Numeric" field is used for the "Automatic calculation" field, and the "Automatic calculation" field is specified as an item for the route branching.

- Attachment:
  If a required field is set, the user of the route step who has the edit permission must attach a file. However, if you already have one or more files attached, you do not need to add attachments.

What will happen if permissions are granted for items?

By granting editing privilege for each route step, the approvers can add content to the requests and attach files. Here are some of the usage examples.

- A superior adds additional information to the request while processing it.
- An accountant adds the payment date to the expense reimbursement form.
- A human resource staff attaches an Excel file with detailed onboarding information to a document for a newcomer.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

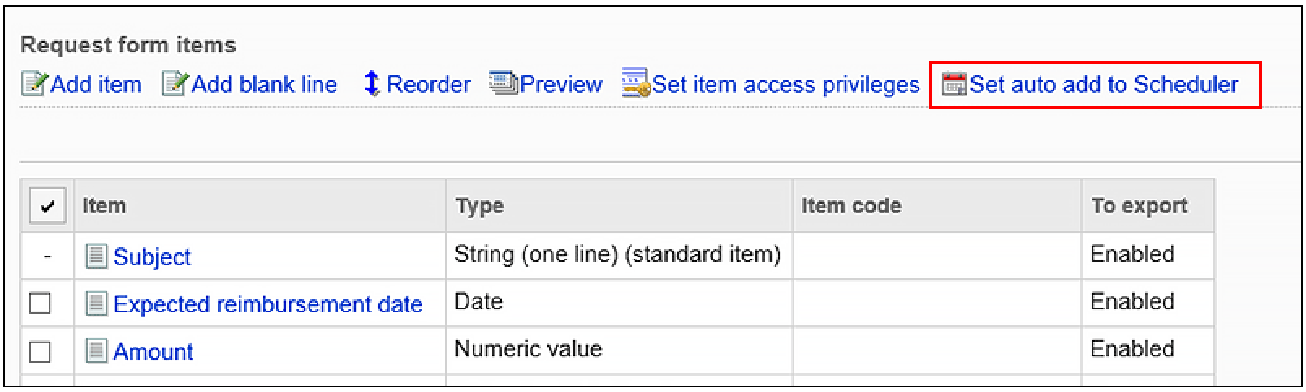
4. Click "Workflow".

5. Click "Request Form" list.

6. On the "Request Form" screen, select a category, and then click the request form name of the request form to set permissions for items.

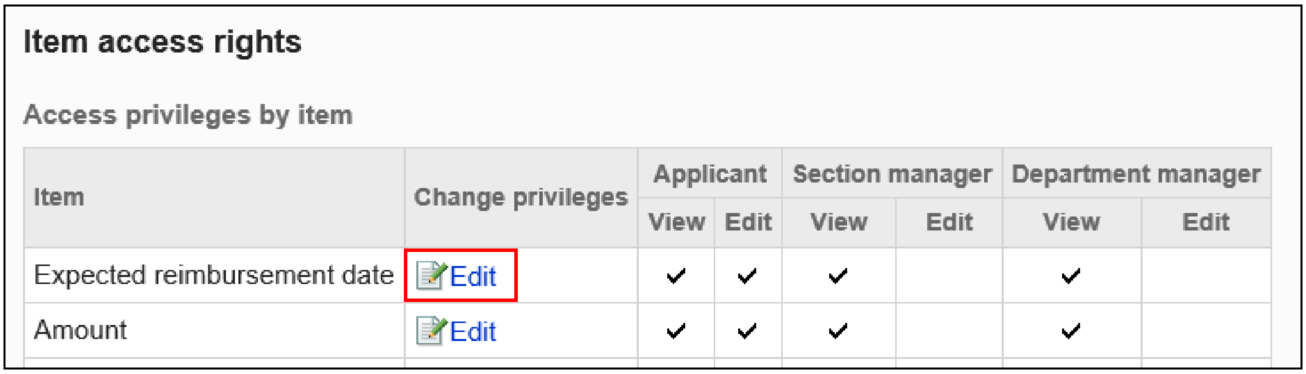
7. In the request form list on the screen for request form details, click the item to set permissions for fields.

If the approval route has not been set, the "Set permissions for an item" Action link is disabled.

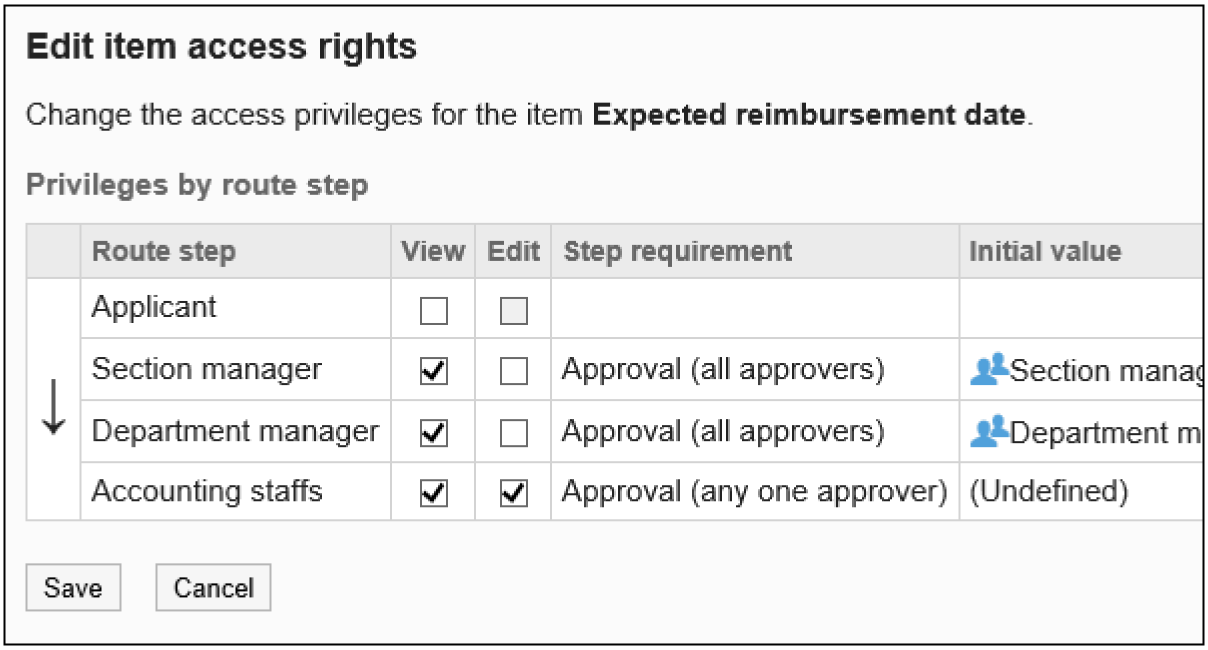


✓	Item	Type	Item code	To export
-	Subject	String (one line) (standard item)		Enabled
☐	Expected reimbursement date	Date		Enabled
☐	Amount	Numeric value		Enabled

8. **On the screen to set user rights, click "Edit" for the item to set user rights.**



9. **On the "Edit User rights for fields" screen, select the check boxes of the permissions you want to grant for each route step, and click "Edit".**



10. **On the preview screen, check the displayed items.**

For details, refer to Previewing Request Forms(1395Page).

Differences of User Rights Applied to Each Screen

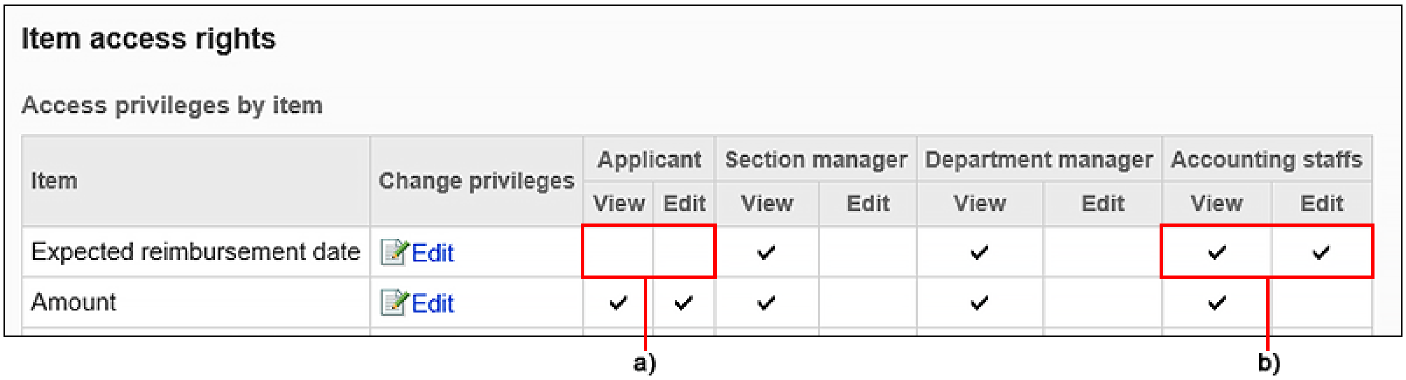
If the same user has been set for multiple route steps with different access rights, the user rights applied to the users will be changed by the display screen.

List screens	User Rights
Sent items list	Applicant User Rights
Results list	Applicant User Rights

List screens	User Rights
Inbox list	Access right for the nearest route step, up to the current route
Unprocessed list	Access right for the current route step
Proxy approval list	Access right for the current route step
Approval appointment list	The user right of the route step closest to the last approval in the approval route step.
Public list	The user rights of the item do not apply.

This section describes the following permissions if you have set them up

- The applicant does not have permission to view or edit.
- The route step of the approval route has permission to view and edit.


Item access rights

Access privileges by item

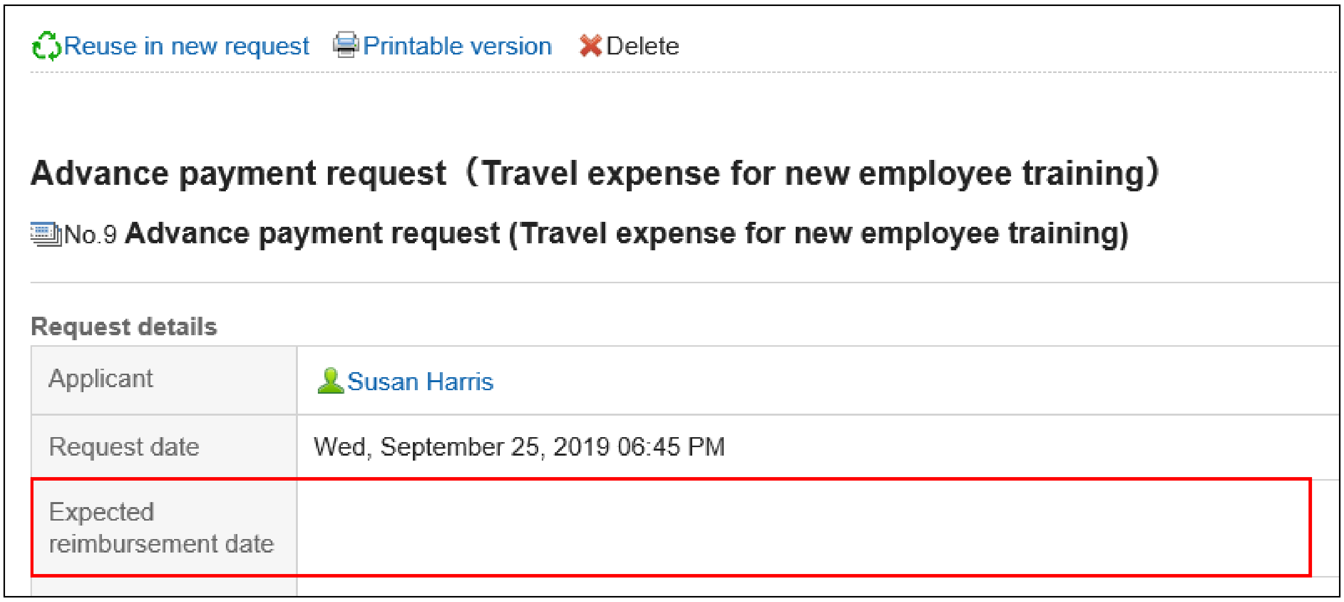
Item	Change privileges	Applicant		Section manager		Department manager		Accounting staffs	
		View	Edit	View	Edit	View	Edit	View	Edit
Expected reimbursement date	Edit			✓		✓		✓	✓
Amount	Edit	✓	✓	✓		✓		✓	

A): "Applicant" does not have permission to view and edit.

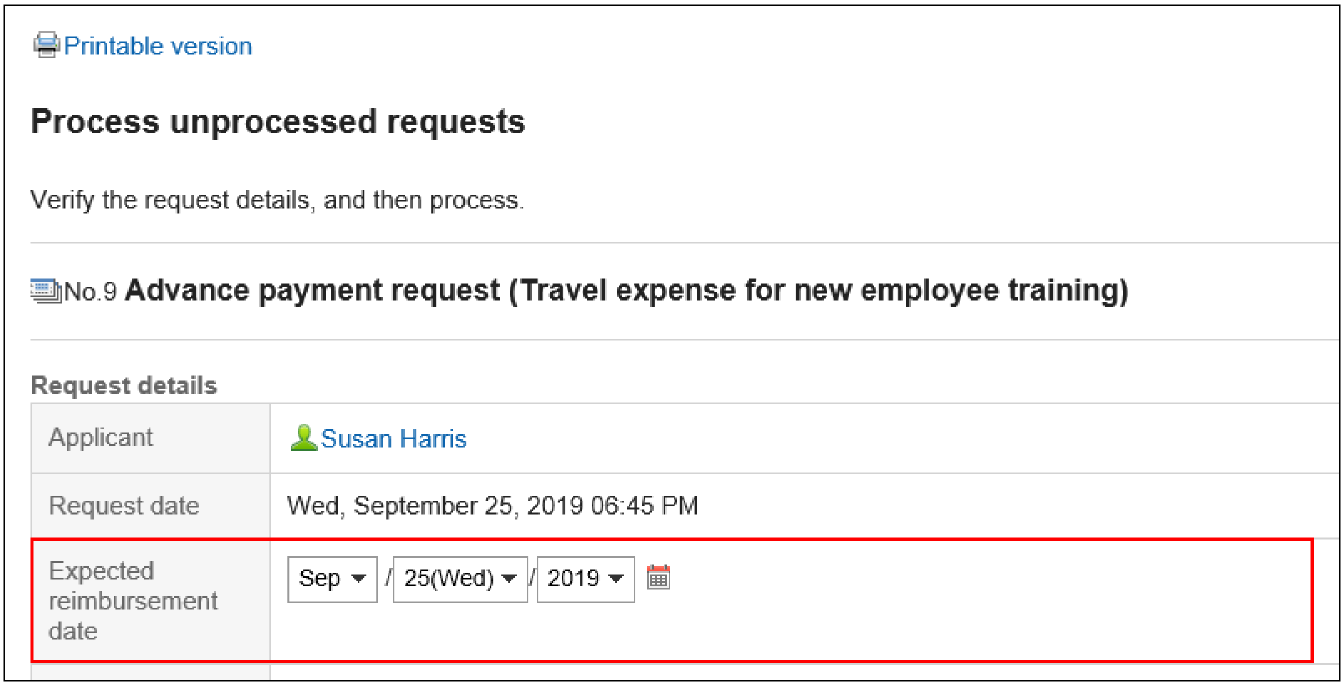
B): "Accountant" has permission to access and edit.

If the processor of the applicant and the route step is the same user, the "sent" and "latest" screens are displayed as follows

- **"Send List" screen**



- **The "latest" page**



2.13.6.9. Previewing Request Forms

Confirm the Request Form name and item display on the preview screen.

You can check the visibility of each user.

Note

- You cannot view the preview screen of users who are not allowed to view the categories in the Request form.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

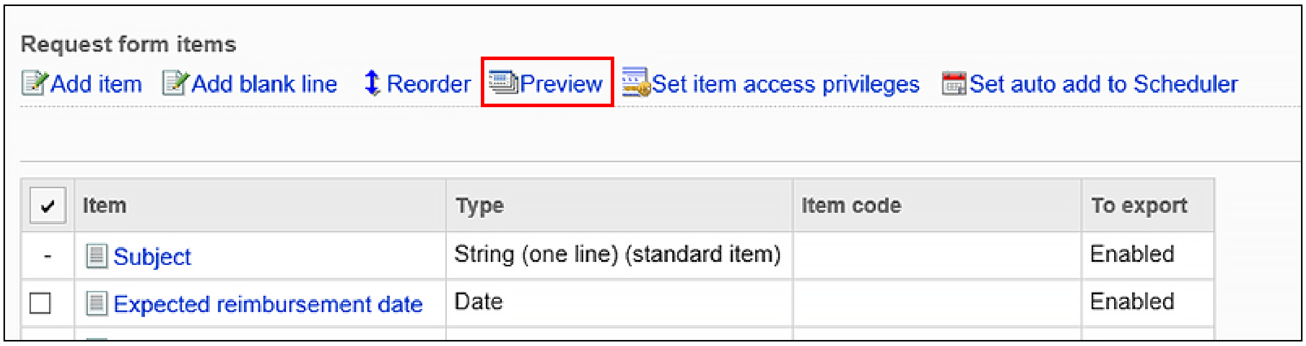
3. Select "Application settings" tab.

4. Click "Workflow".

5. Click "Request Form" list.

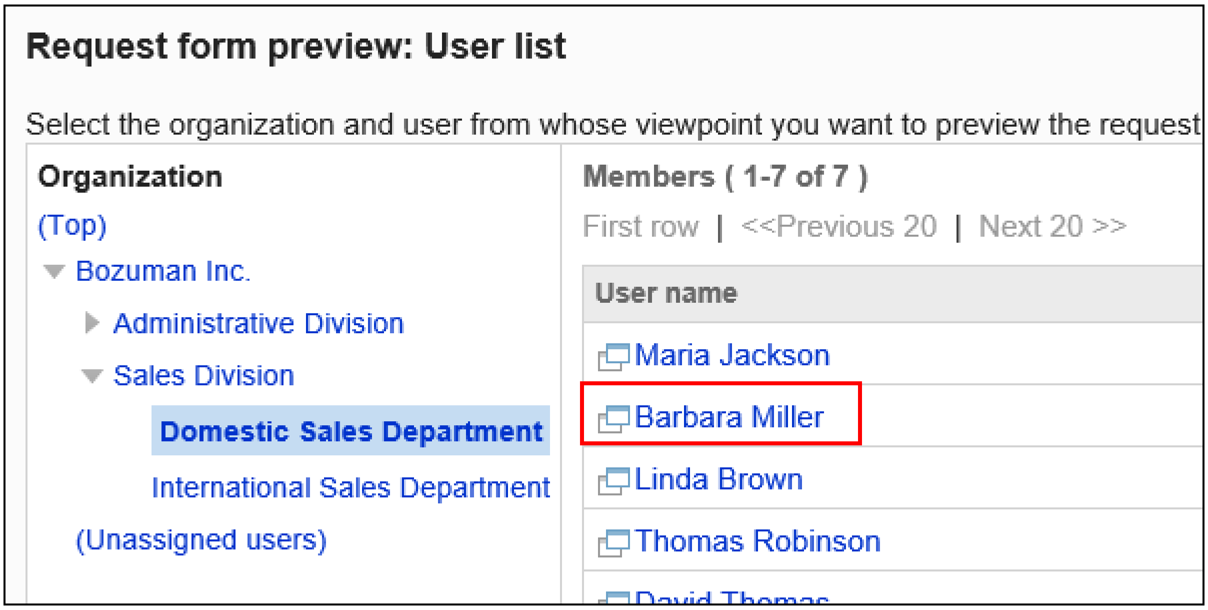
6. On the "Request Form" screen, select a category, and then click the request form name of the request form to see the appearance of the form.

7. In the request form list on the screen for request form details, click the item to preview the request form.



8. On the "Preview request Form" screen, select the user who you want to confirm the display.

The preview screen opens in a new tab or window.



9. On the "Request Form Preview" screen, confirm the request form name and the item.

Buttons such as "Set route" and "Cancel" cannot be used on the preview screen.

2.13.6.10. Auto Add to Scheduler

The contents of the approved request data can be added to the scheduler automatically.
For example, if a vacation or a travel request is approved, the appointment is automatically added to the schedule and other members can confirm the appointment.

To set up auto-enrollment to scheduler, you must set the "Date" field in the Request form.
You can add a regular or a period of public appointment of the date entered in the "Dates" field of the request data.

Items of Scheduler That Work with Workflow

Workflow		Scheduler
Subject field	->	Subject
Appointment type	->	Appointment type
Start and end date and time	->	Date and time

Workflow		Scheduler
URL on the "Request Details" screen	->	Memo
Applicant	->	Attendees, registrants, and updated
Last approved date and time	->	Date/Time create and updated[1]

[1]: Registered in the time zone of the applicant at the time of the request.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

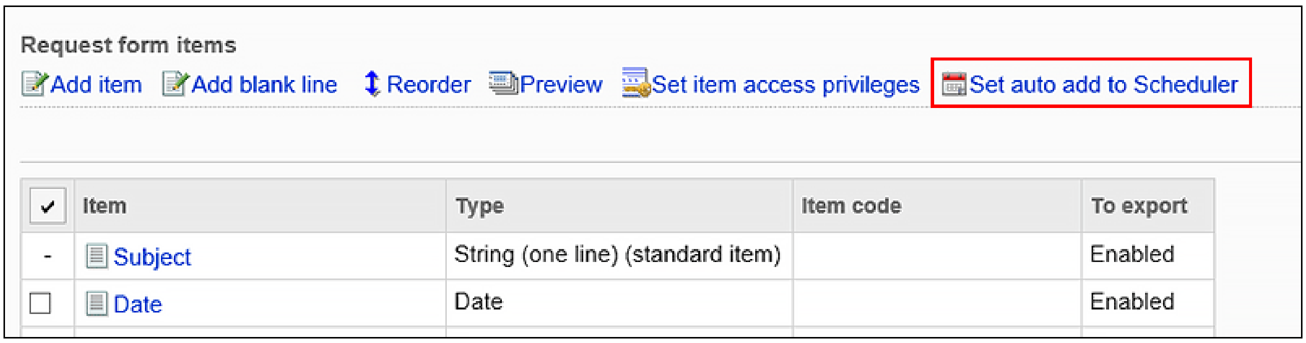
4. **Click "Workflow".**

5. **Click "Request Form" list.**

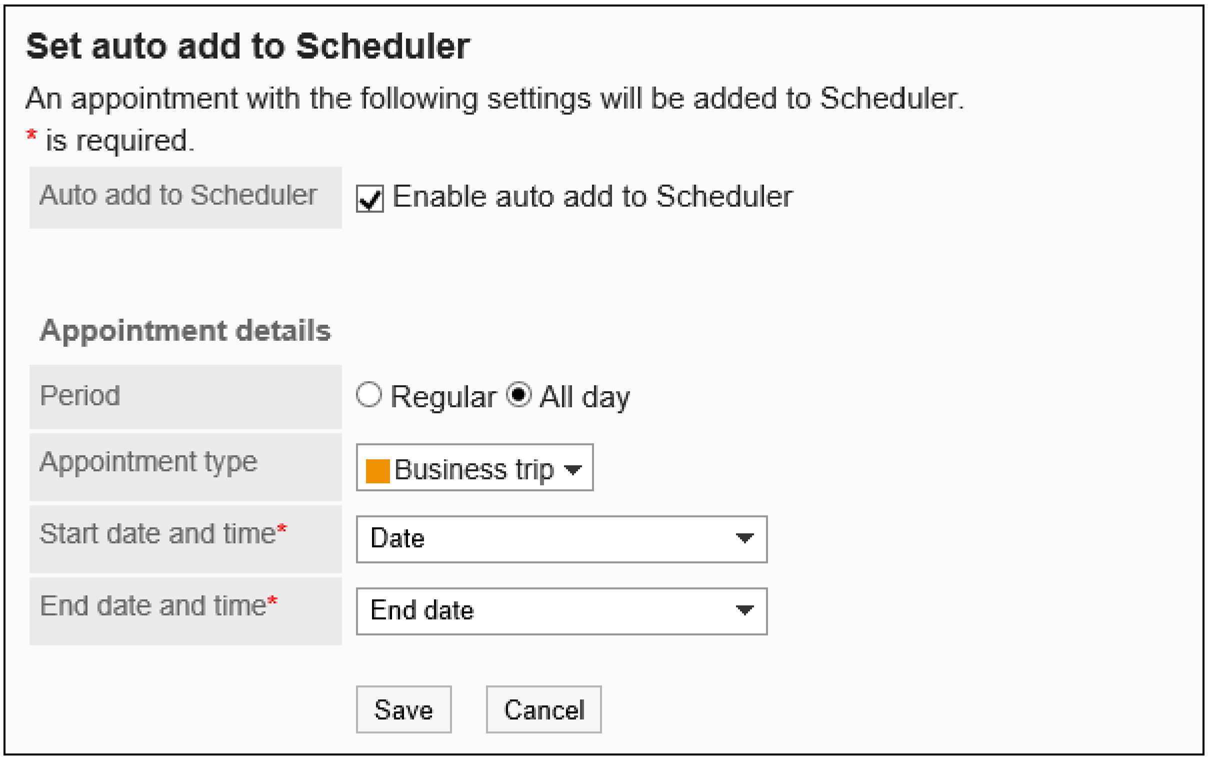
6. **On the "Request form List" screen, select a category, and then click the Request form name on the request form for which you want to set auto-add to scheduler.**

7. **On the "Request form details" page, select "Set auto add to Scheduler.**

   If the "Date" field is not set, the "Set auto Add to Scheduler" Action link is disabled.
   If the scheduler is inactive, the action links are not displayed.



8. **On the "Set auto add to Scheduler" page, select the "Enable auto add to Scheduler" check box,**



9. Set the "contents of the appointment to be added" field.

The setting fields are as follows:

- Type of Appointment

  Select either an appointment or an appointment.
- Appointment Menu

  Select the appointment type that you want to display in the title of the appointment.

  For details, refer to Setting up Appointment Types(853Page).
- Start date and time

  Select the "Date" field in the request form, which is set as the start date of the regular appointment, or the start date of the period appointment.
- End Date and time:

  Select the "Date" field in the request form that you want to set as the end date and end date of the regular appointment.

10. Confirm your settings and click "Save".

When the Automatic Registration to Scheduler Succeeds

The following message appears on the "Request Details" screen of the applicant Clicking "Confirm Appointment" Displays the "Appointment details" screen.

An appointment has been added to the scheduler automatically. Confirm the appointment.

When the Automatic Registration to Scheduler Fails

The following message appears on the "Request Details" screen of the applicant

```
Auto Add to Scheduler failed. 」
```

The following are the primary reasons for the automatic registration of scheduler to fail:

- The start date and end date and time settings are incorrect.
- The date and time specified in the "Day" field of the request data are invalid.
- The applicant has been deleted or is set to be deleted by the user.
- The applicant is not allowed to use the scheduler.
- The scheduler is set to the inactive application.
- In the request form, only an acknowledgment route is configured as a request route.
- The route branching configured in the request form made the approval route to be skipped, which then created the request data with a "acknowledgment only" request route.

2.13.7. Setting up Route Information

A request route must be set for the request form.

There are two ways to set up a shared route and create a new private route.

References

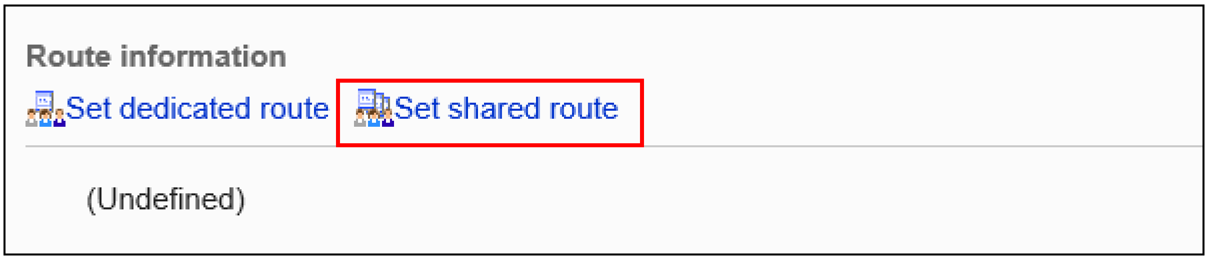
- Differences between shared and dedicated routes(1268Page)
- Applying a shared route(1401Page)
- Setting up Dedicated Routes(1402Page)
- Approval route settings (dedicated routes)(1406Page)
- Acknowledgement route settings (dedicated routes)(1424Page)
- Route Preview(1444Page)

2.13.7.1. Applying Shared Routes

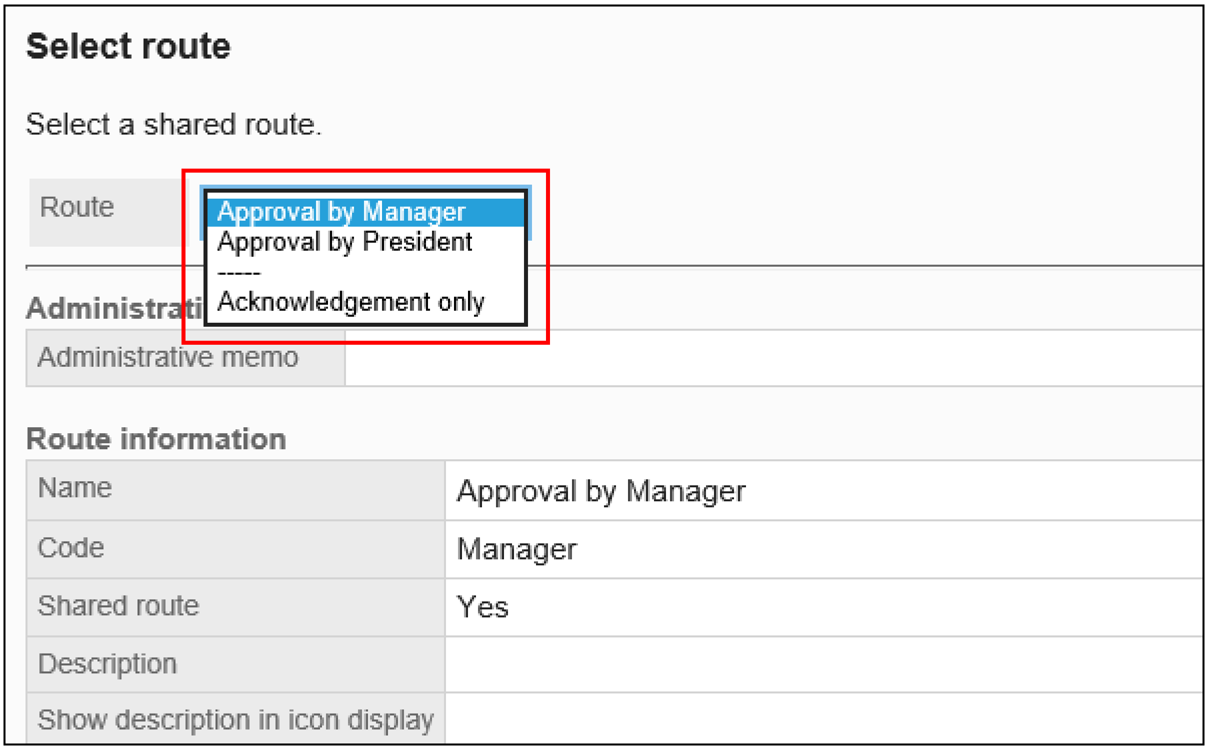
There are two ways to set up a request route: To select a shared route that has been created, and to create a private route.
This section describes how to set a route by selecting a shared route that has been created.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the item to set a shared route in route information.**



8. **On the "Select route" screen, select a shared route to apply from the drop-down list.**



9. **Confirm your settings and click "Apply".**

10. **On the preview screen, confirm the request route.**

    For details, refer to route preview(1444Page).

2.13.7.2. Setting up Dedicated Routes

Set a dedicated route for the request form.

Set basic information such as route name and Route code.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

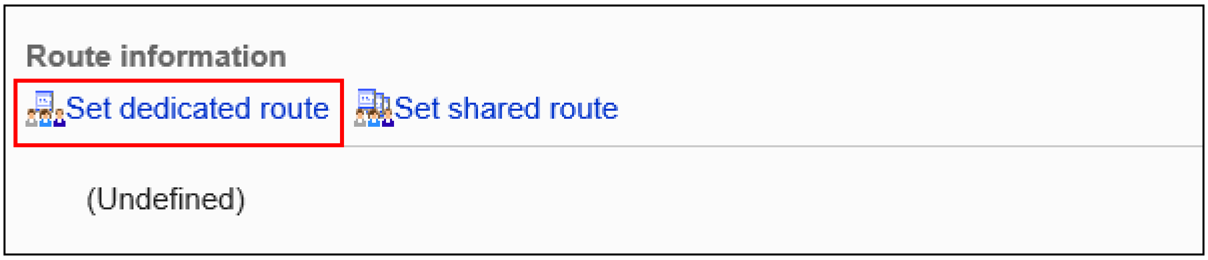
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

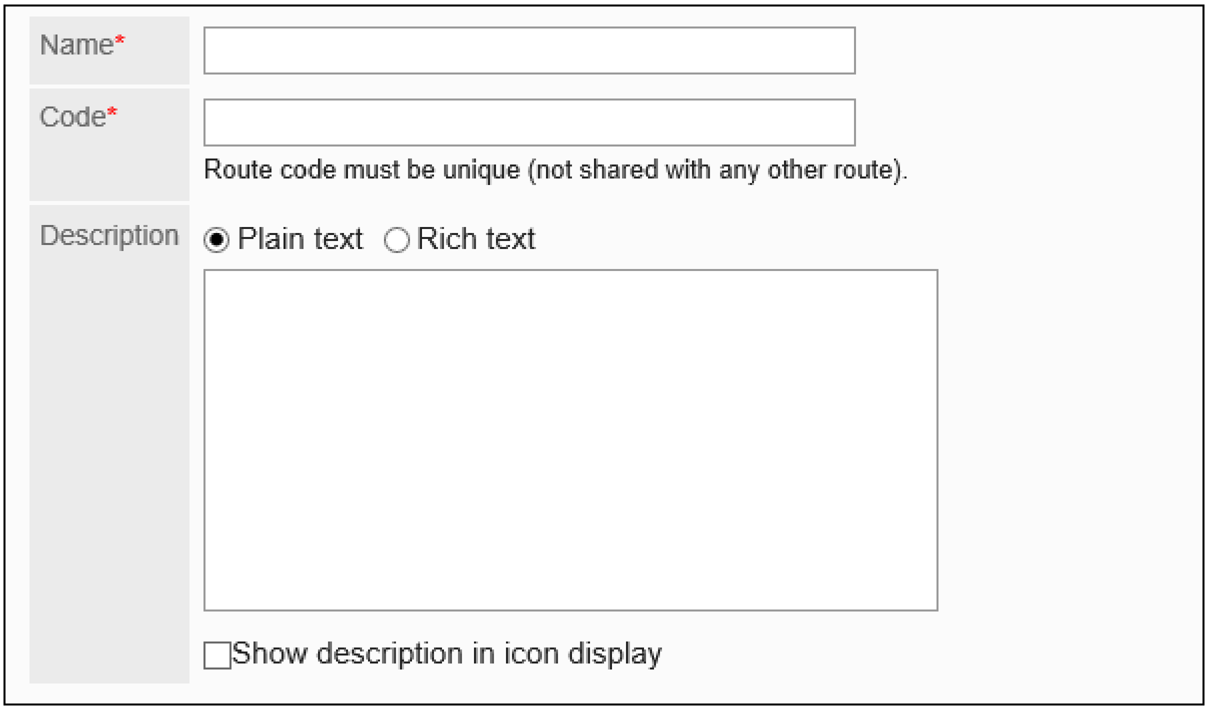
7. **On the screen for request form details, click the item to set a dedicated route in route information.**



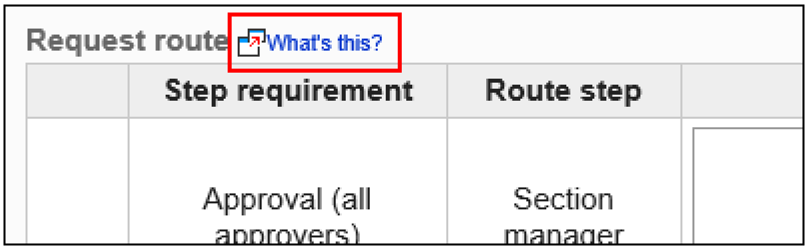
8. **On the "Private Route Settings" screen, set the required items.**

9. **Confirm your settings and click "Save".**

Dedicated Route Settings



Item	Description
Route Name	Enter the route name.
Route code	Unique code for identifying routes.
Route description	Enter a description of the private route. You can use Rich Text Formatting. To display the description on another screen, select the check box for "Show description as

Item	Description
	Icon". The information entered is displayed on the "Create request (route)" screen of the user. 

2.13.7.3. Changing Dedicated Routes

Change notes for administrators and route information in dedicated routes.

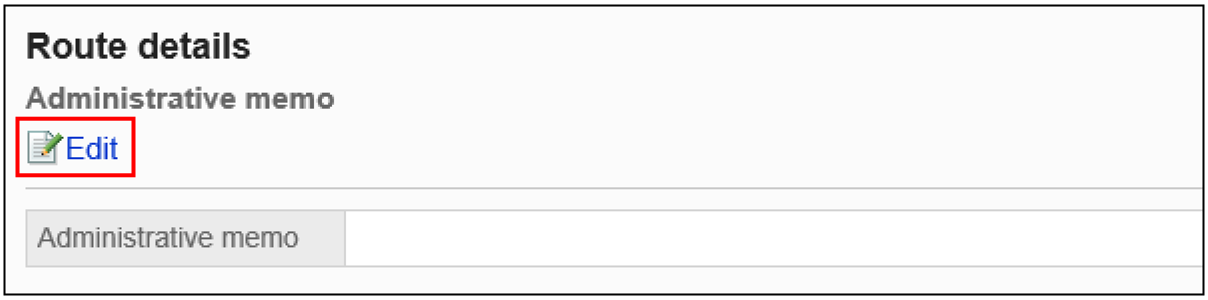
Changing Notes for Administrators

You can add work histories and notes in notes for administrators.

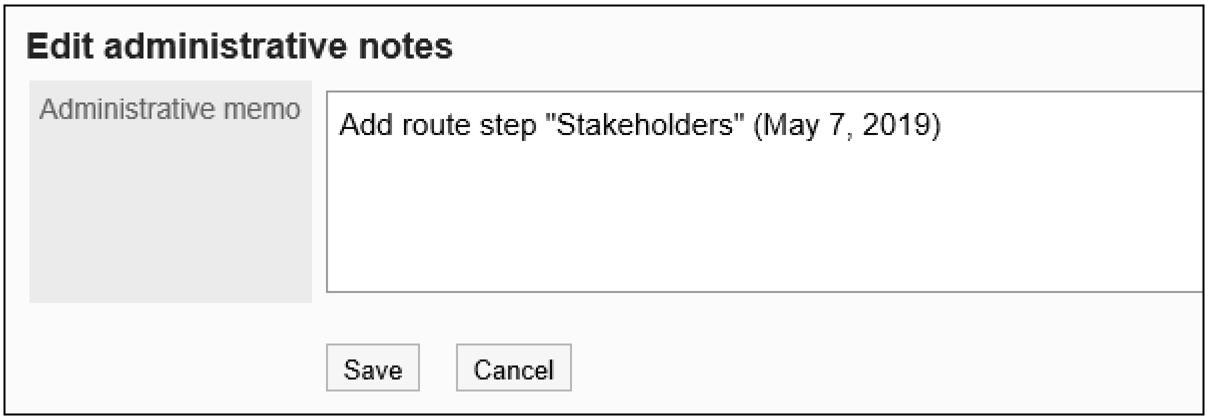
The notes for administrators are displayed only on system administration screens. They are not shown on user screens.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the dedicated routes tab, and then click the route name of the dedicated route to change the administrative notes.**
7. **On the route details screen, click "Save" in notes for administrators.**



8. **On the screen to change notes for administrators, enter your work history and notes.**



9. **Confirm your settings and click "Save".**

Changing Route Information

Change the route information in the private route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

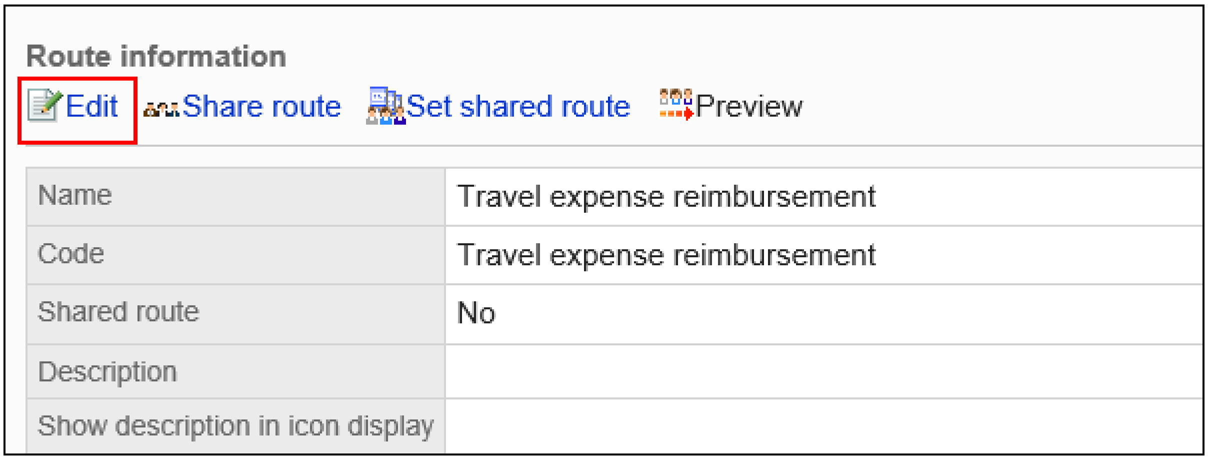
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the dedicated routes tab, and then click the route name of the dedicated route to change the route information.**

7. **On the route details screen, click "Save" in route information.**



8. On the "Change route" screen, set the required items.

For details, refer to dedicated route settings(1403Page).

9. Confirm your settings and click "Save".

Note

- You can also change the route information for a private route from the screen for request form details of a request form using the route.

2.13.7.4. Setting up Approval Routes (Dedicated Routes)

Set up a route step for approving the request. Multiple route steps can be set.
You can also set the approver for each route step beforehand.

Adding Route Steps

Add a route step for the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

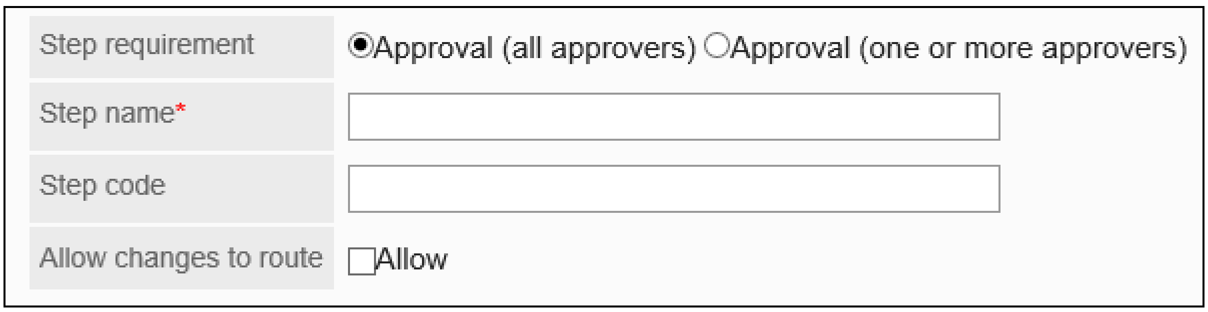
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click "Add" in "Approval route".**

8. **On the "Add route Step" screen, set the required items.**

9. **Confirm your settings and click "Add".**

Setting Items of Route Steps for Approval Routes



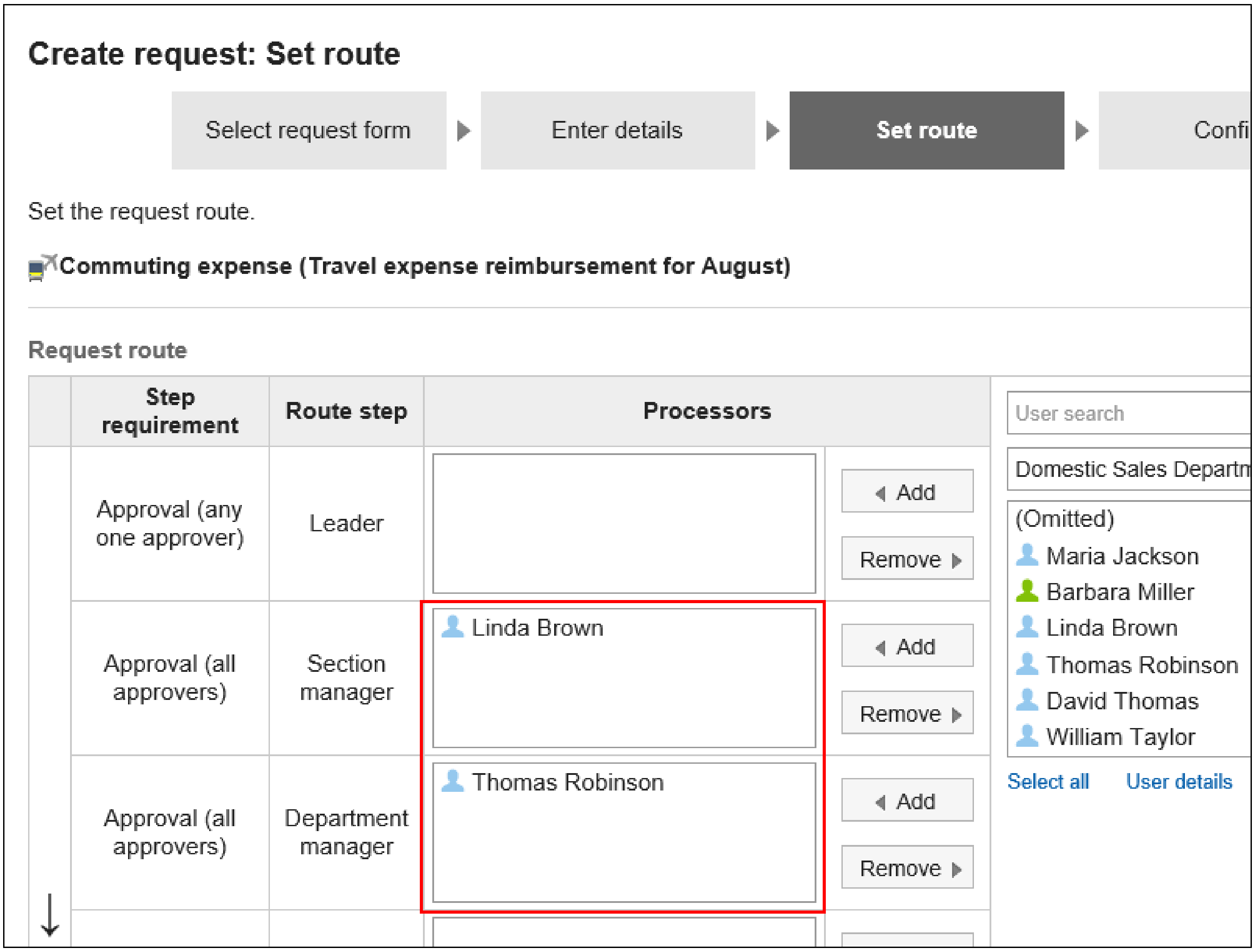
Item	Description
Route type	Select the approval style for the route step. • Approval (all approvers): Multiple approvers can be set. If all processors have been approved by the request, proceed to the next route step.

Item	Description
	If one of the processors you have set returns a request, the request will be returned. The same is true in the case of rejecting the request. • Approval (any one approver): Multiple approvers can be set. If one of the processors you have set approves the request, proceed to the next route step.
Route Step Name	Enter the route step name.
Step code	An item code is a unique code to identify items for JavaScript customization. If you do not use the JavaScript customization, you do not need to set the route step code. You can use single-byte alphanumeric characters, hyphens, and _ (underscores). When a step code is duplicated in one request form, an error occurs. Up to 100 characters can be entered in a code. If 101 or more characters are entered, the first 100 characters are registered.
Allow Route change	To allow a processor to reroute, select the "Allow" check box. If a route change is allowed, the processor can be changed by other processors in the same route step and in the subsequent route step, when processors are processed in this route step.

Setting Default Values for Route Steps

Setting the default value for the route step simplifies the job of the applicant.

Organization, user, or role.



Adding Default Values

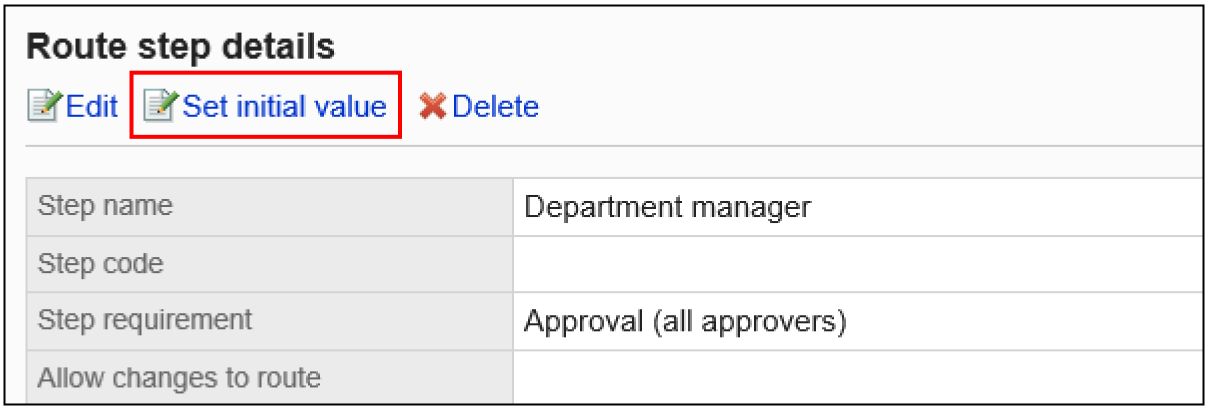
Adds the default value for the route step.

Steps:

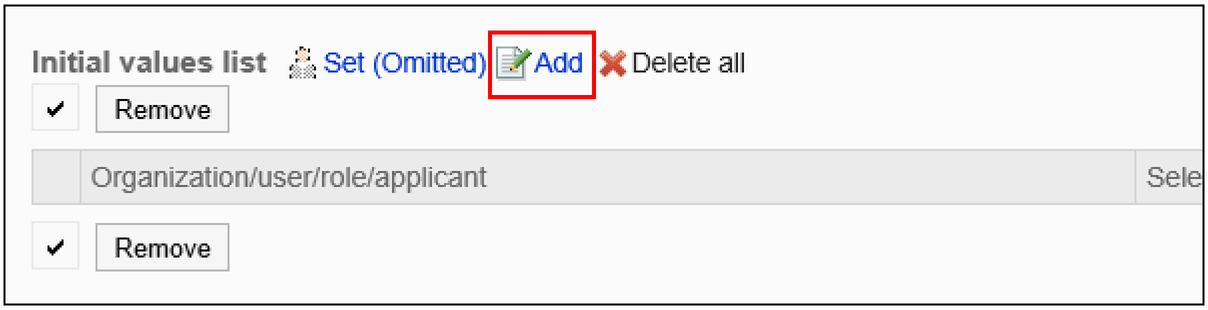
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



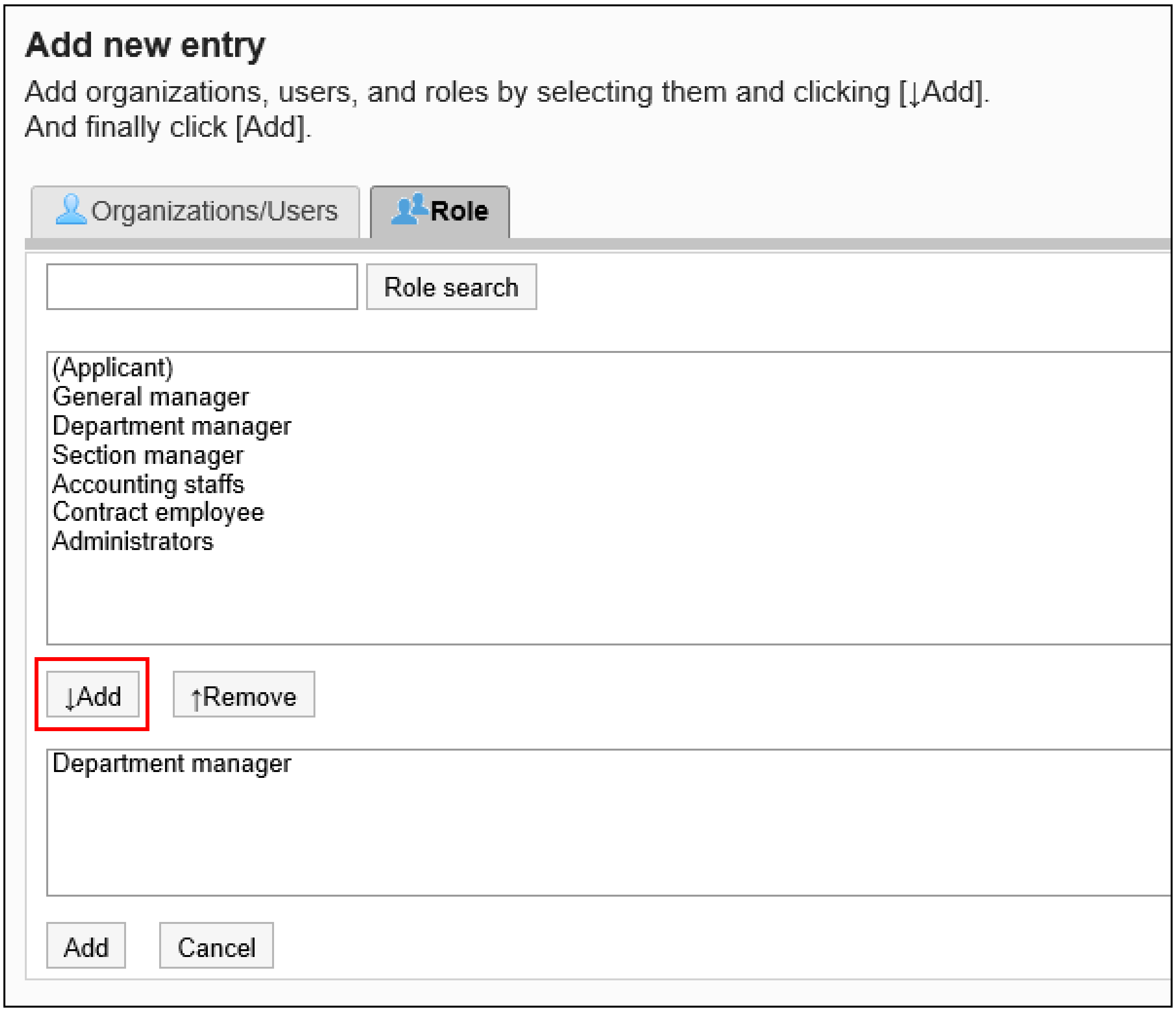
9. **On the screen to set default settings, click "Add" in the default value list.**



10. **On "Add default watchers" screen, select the organization, user, or role, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



11. Confirm your settings and click "Add".

Setting Default Superior

When you add roles to the initial value of a route step, users who have the roles that you have set can display only the superior of the applicant when the user requests.
Superior is displayed as a "priority organization" of the applicant, or a user who belongs to the organization.

Users Shown as Superiors

If you have configured the superiors for the default value of a route step, the users shown as the superiors in the processor field are determined by the following conditions.

1. A user who belongs to the "priority organization" of the applicant and who has the specified role
2. A user who is a member of the organization that is higher in the "priority organization" of the applicant and who has the specified role

If there are any users who match condition 1, those users are displayed as the superiors in the processor field.
If there are no users who match the condition 1, users meeting condition 2 are displayed as the superiors in the processor field.

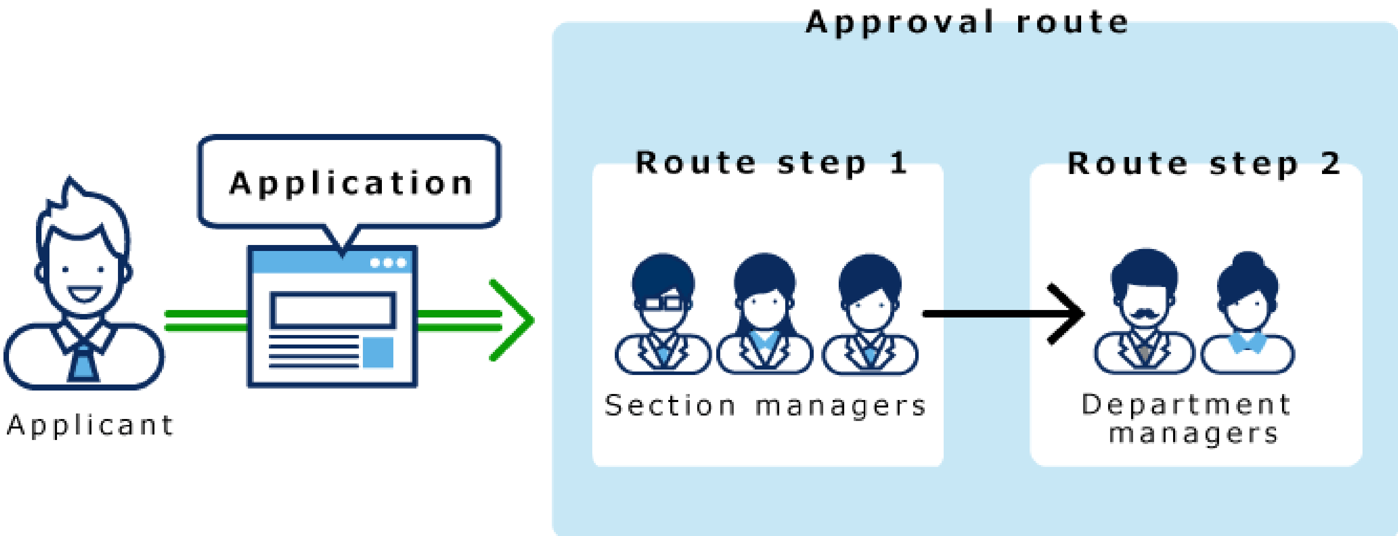
Image of Usage

This section describes how to create a request data for a user who is a member of the sales department.
The priority organizations of the applicants are the sales department.
The above-said applicant is the director of Sales department and one division manager. The Sales department manager has the role "manager" and the "Manager" section.

Headquarters
- Sales department
  - Sales department manager (Role: Department manager)
  - Sales Section 1
    - Sales section 1 manager (Role: Section manager)
    - Applicant
  - Sales Section 2

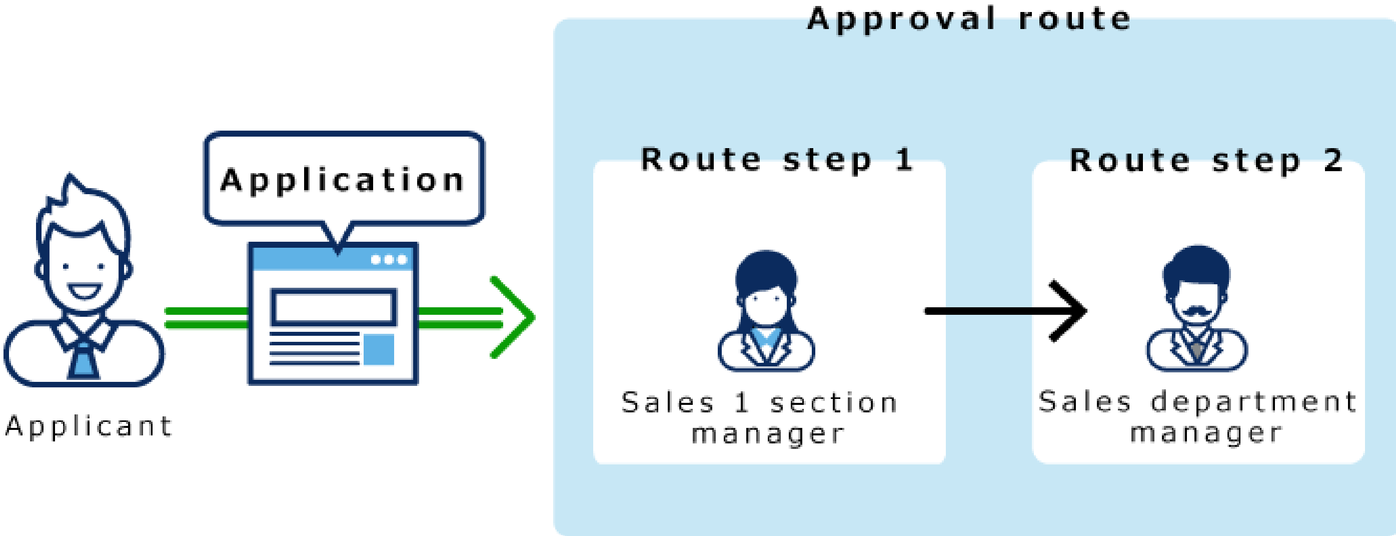
If you have set the role of "manager" as the initial value of step 1 and the "manager" for the initial value of route step 2, when you create the request data, all users belonging to each role will be set as processors.
The applicant must select his or her top length from among the processors.

Before superior:



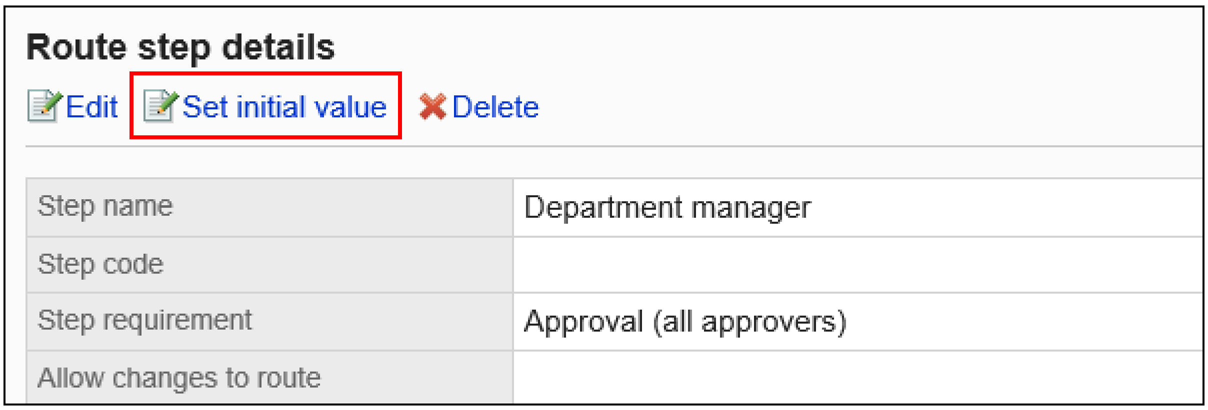
If you set superior in Route Step 1 and Step 2, only your superior is automatically set for the processor of each route step.

After setting superior:



Steps:

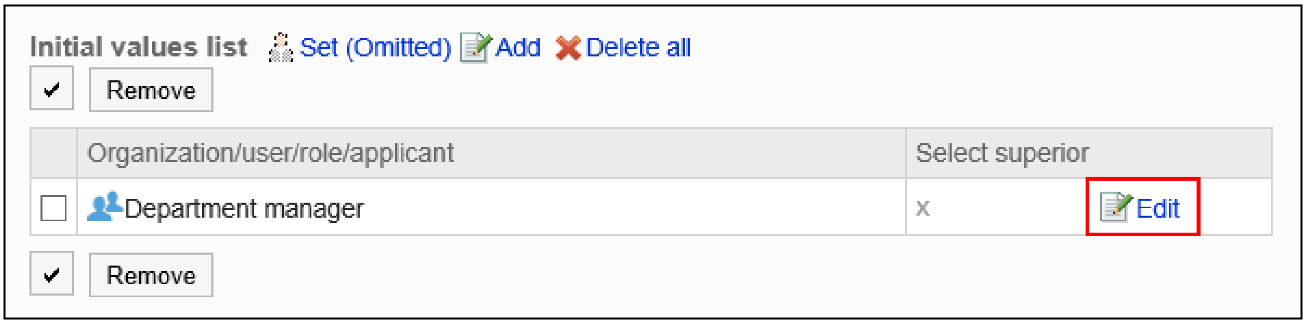
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step in "Approval route" field.**
8. **On the "Route Step Details" screen, click "Set Default".**


Route step details

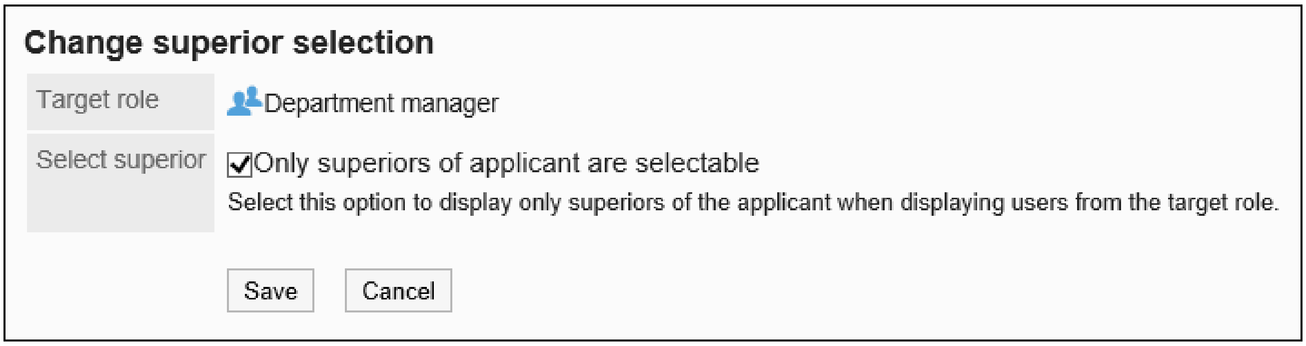
Edit Set initial value Delete

Step name	Department manager
Step code	
Step requirement	Approval (all approvers)
Allow changes to route	

9. **On the screen to set default settings, click "Change" in the default value list for the role to set a superior.**

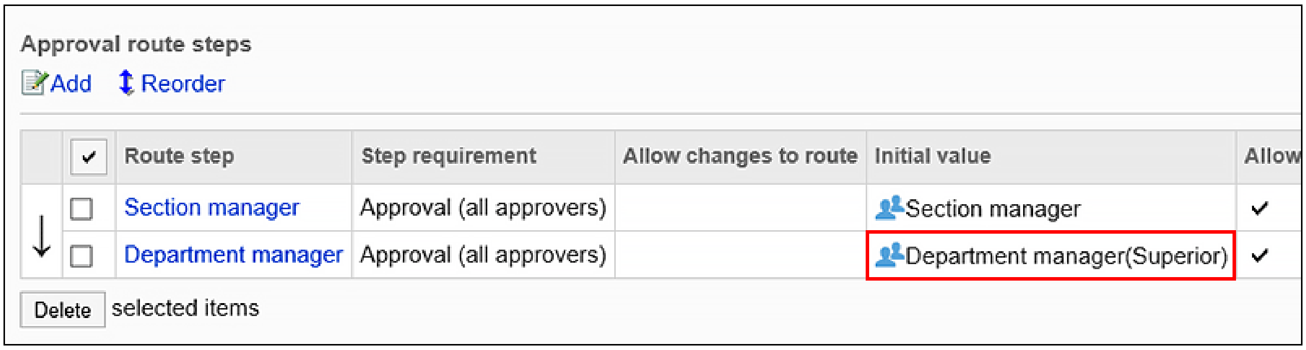


10. **On the "Change superior selection" screen, select the "Select the" check box.**



11. **Confirm your settings and click "Save".**

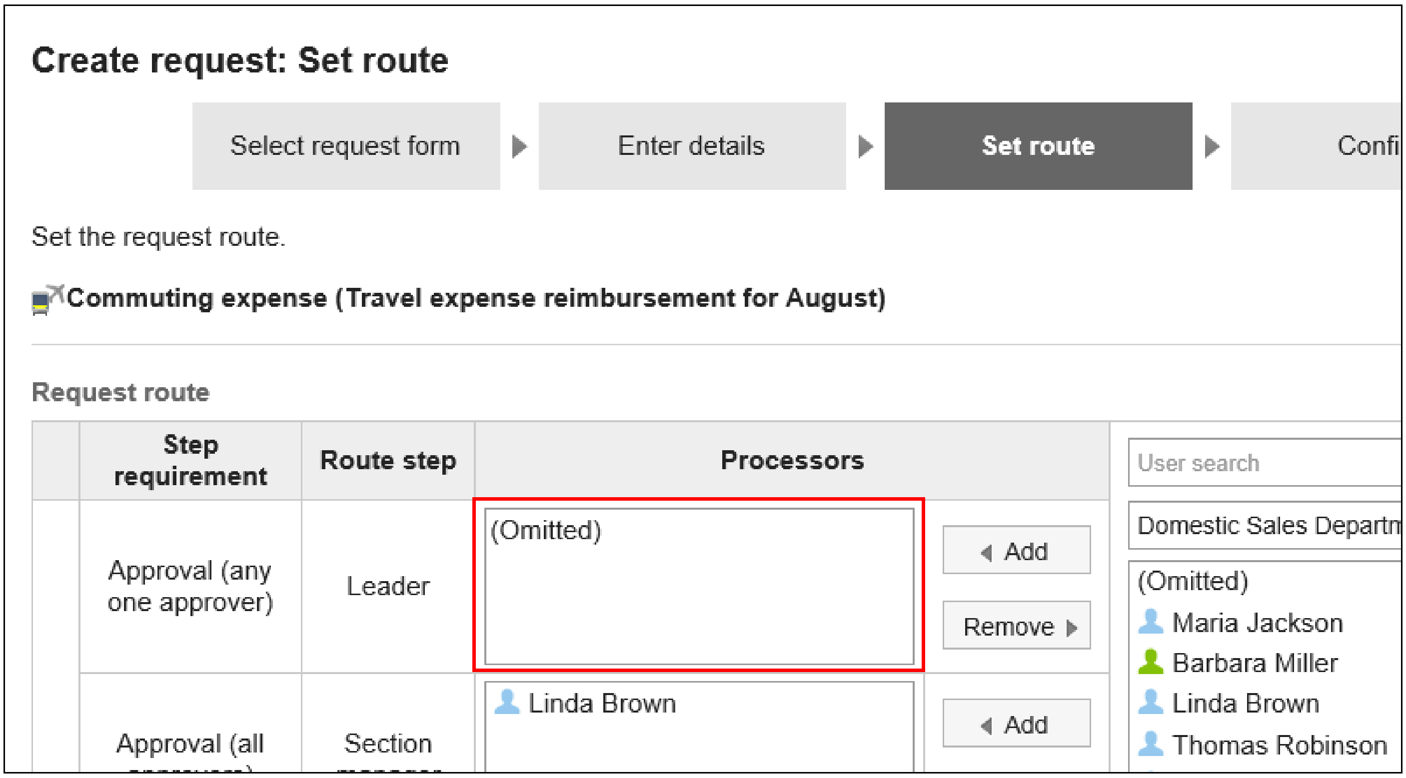
When you set a superior, "(superior)" is added after the role name on the screen for request form details.



Setting Default Value to "(omitted)"

The default value can be set to "(omitted)" For a route step that is expected to have no processors.

A route step with a set of "(omitted)" skips the processing of the request data.

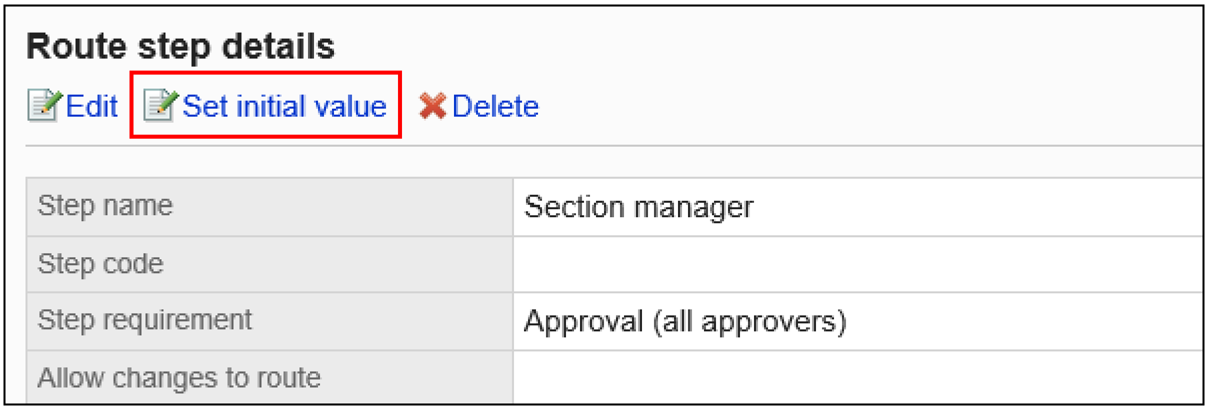


Note

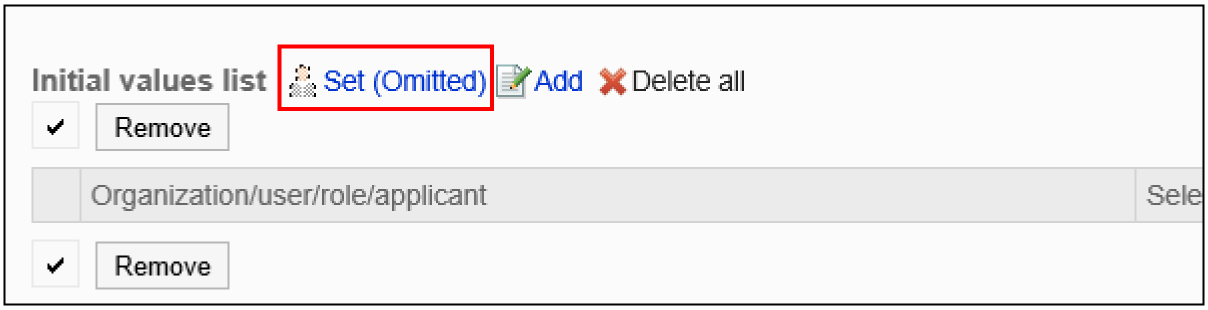
- The final approval route step cannot be omitted. Even if you set the default value to "(omitted)", the "Create request (route)" page does not apply to the user.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step in "Approval route" field.**
8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "(Omitted)" to set in the default value list.**



10. **Click "Yes" on the "(omitted)" screen.**

    If you have already set the default value for this route step, delete all default values and delete "(omitted)".

Allowing Applicants to Change Default Values

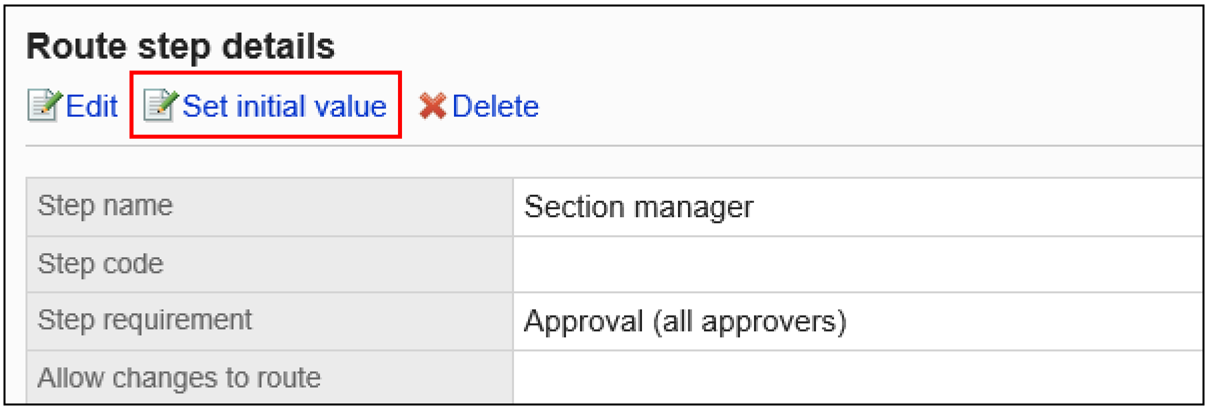
When you create a request data, you can set whether to allow the applicant to change the default value of the route step.

Steps:

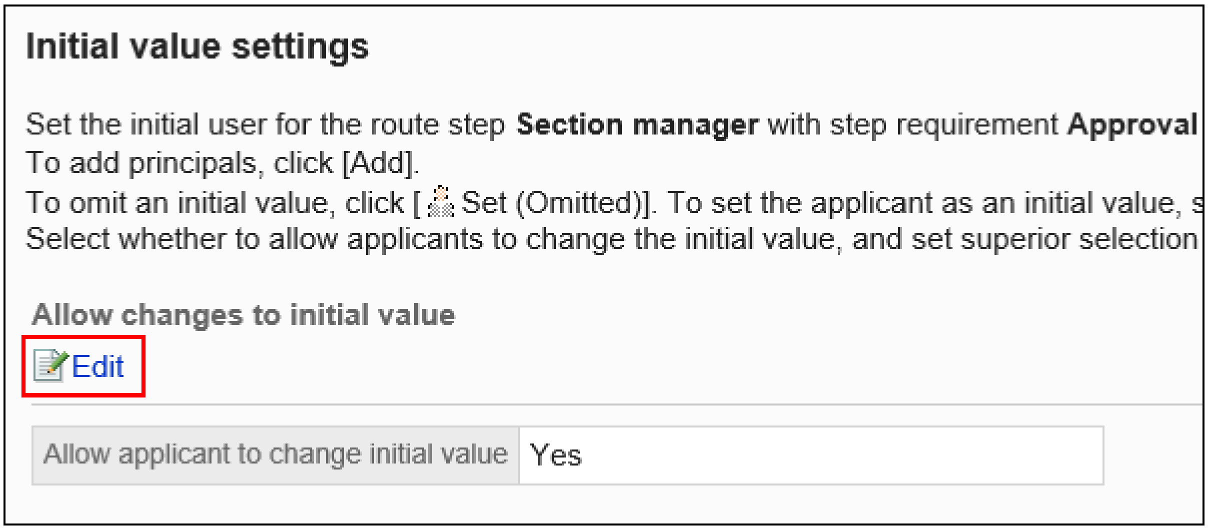
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**

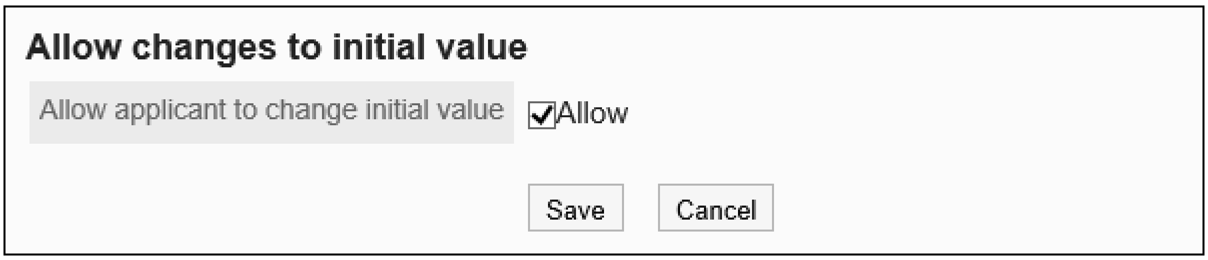


9. **On the screen to set default settings, click "Save" in the field to allow defaults to change.**



10. **On the "Allow Default change" screen, select the "Allow applicant to change default values" check box.**

Otherwise, clear the check box.



11. **Confirm your settings and click "Save".**

Selecting and Deleting Default Values

Select the default value that is set for the route step and delete it.

Caution

- The deleted default value cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

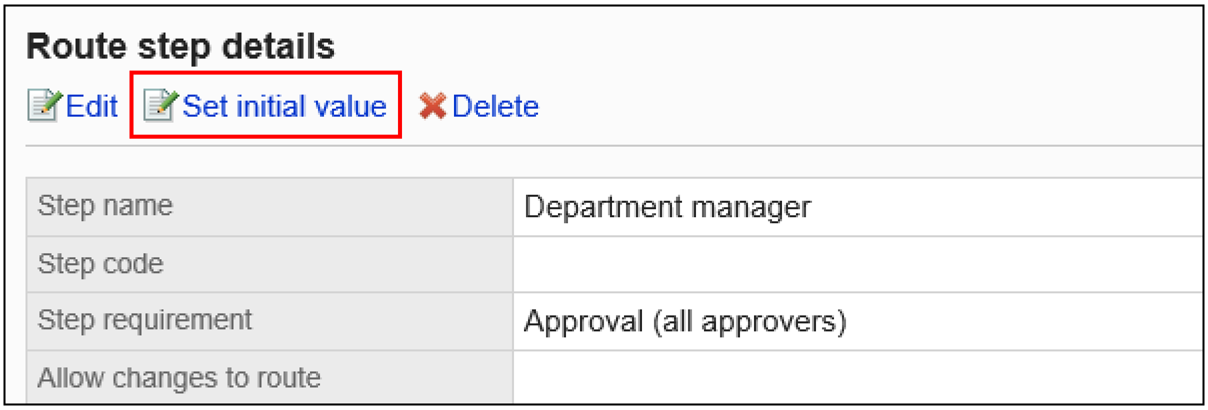
4. **Click "Workflow".**

5. **Click "Request Form" list.**

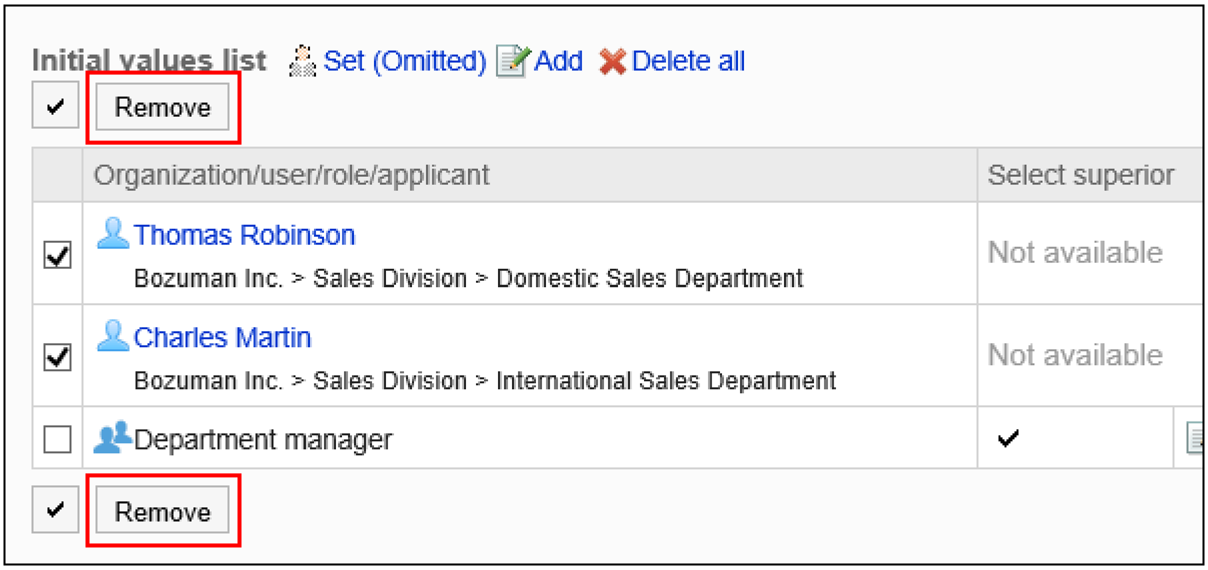
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **In the default value list on the screen to set default settings, select the check box for departments, users, or roles to delete from the default values, and click "Delete".**



10. **Click "Yes" on "Delete default watchers" screen.**

Deleting All Default Values

Delete all default values for the route step.

Caution

- The deleted default value cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

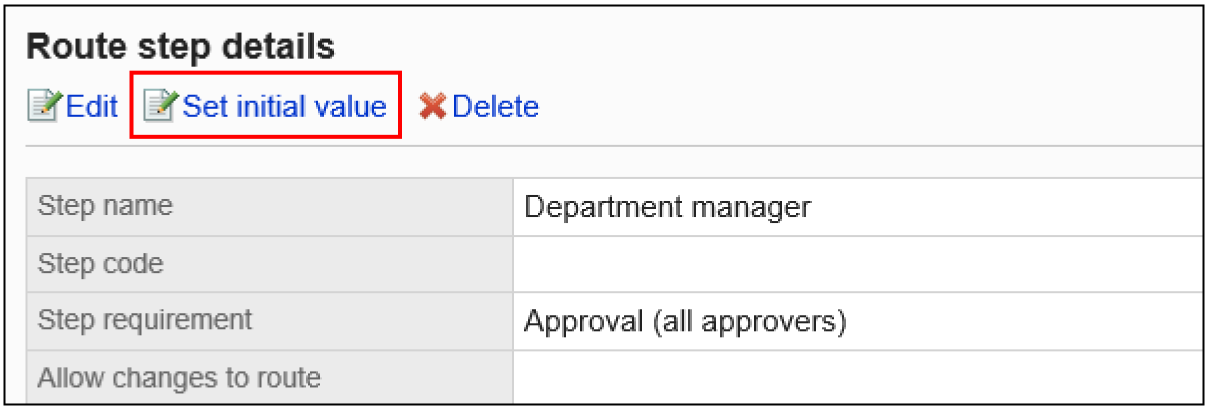
4. **Click "Workflow".**

5. **Click "Request Form" list.**

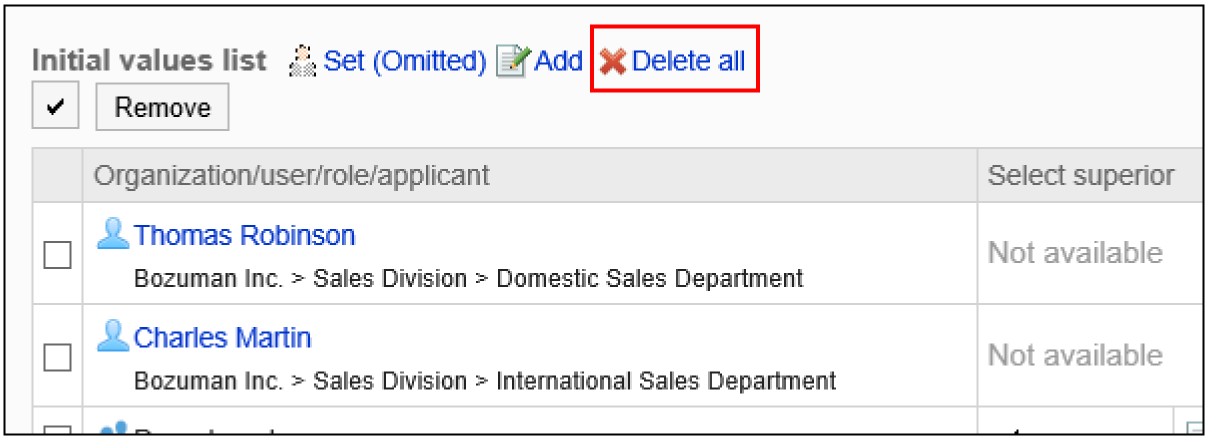
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Approval route" field.**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Delete all" in the default value list.**



10. **Click "Yes" on "Delete all default watchers" screen.**

Changing Route Steps

Change the settings for the route step in the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

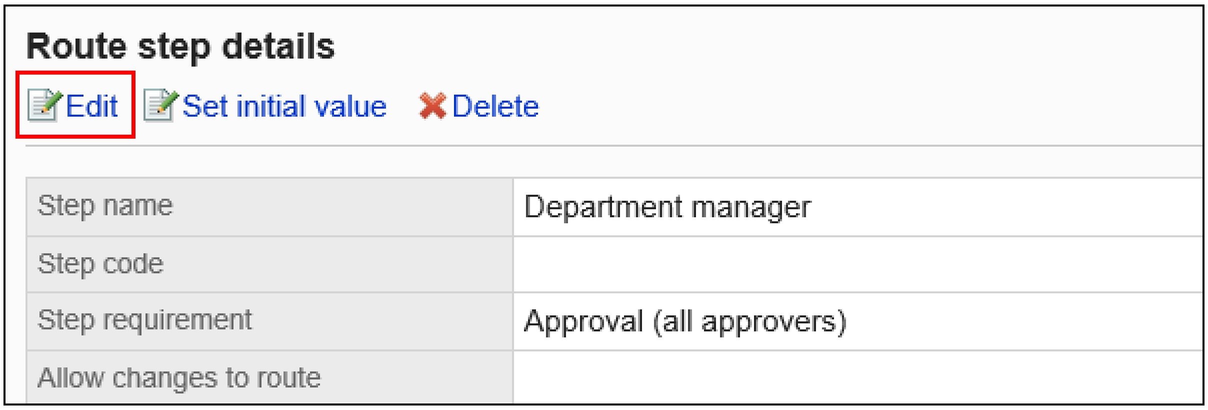
4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step to change in "Approval route" field.**

8. **On the route step details screen, click "Save".**



9. **On the "Change route step" screen, set the required items.**

   For details, refer to settings for route steps in the approval route.

10. **Confirm your settings and click "Save".**

Reorder Route Steps

Reorder Route steps in the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

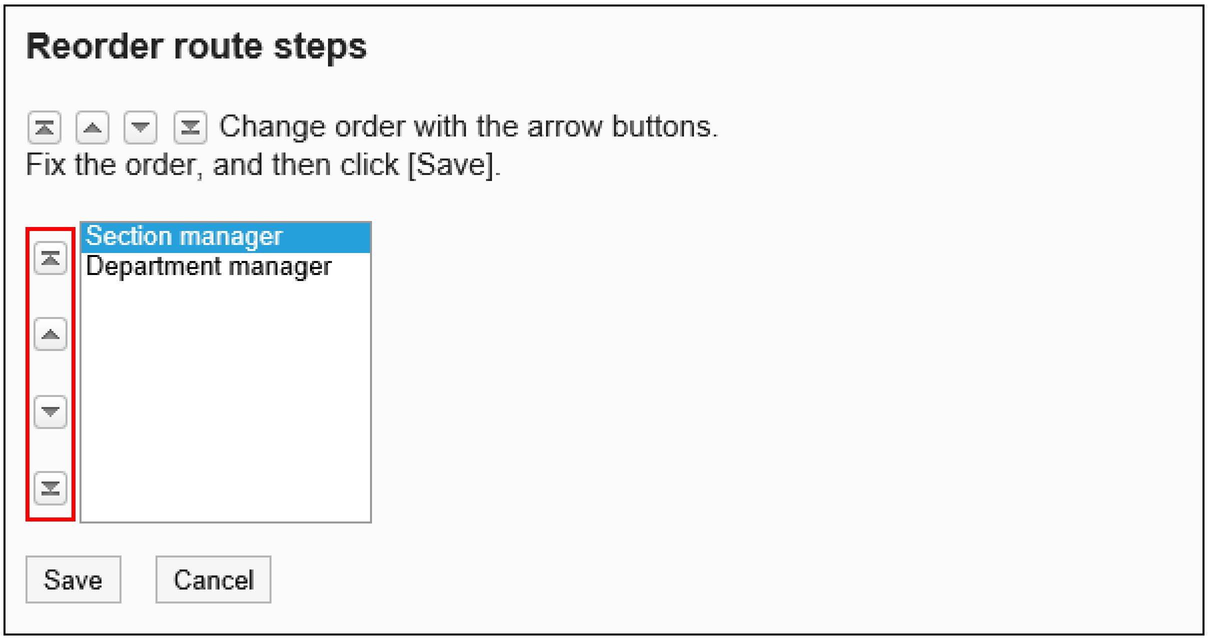
4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click "Reorder" in "Approval route".**

8. **On the Reorder Route steps screen, reorder route steps.**



9. **Confirm your settings and click "Save".**

Deleting Route Steps

Delete the route step for the approval route.

Caution

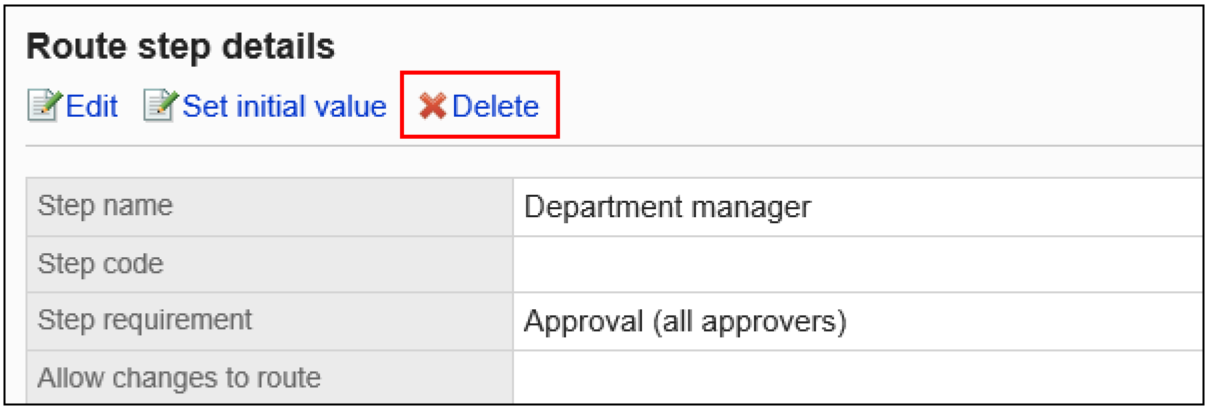
- The deleted route step cannot be restored.

Deleting Route Steps One by One

Delete the route step for the approval route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step to delete in "Approval route".**
8. **On the "Route Step Details" screen, click "Delete".**



9. **Click "Yes" on the "delete route steps" screen.**

Deleting Multiple Route Steps in Bulk

Select the route step for the approval route you want to delete, and delete it in bulk.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

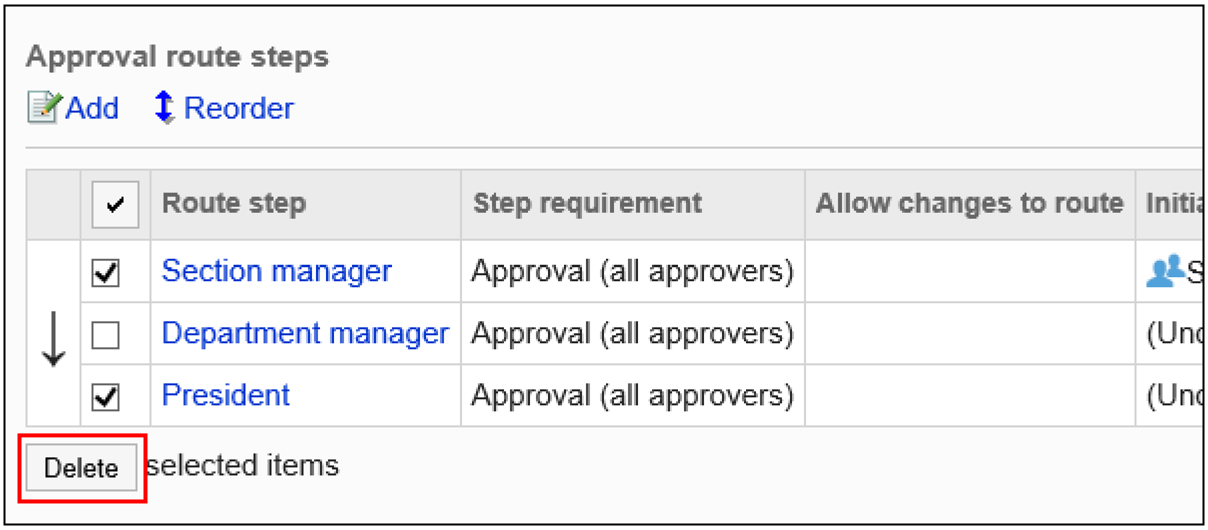
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, under "Approval route", select the check box for the route step to delete, and then click "Delete".**



8. **Click "Yes" on the "delete route steps" screen.**

2.13.7.5. Setting up Acknowledgement Routes (Dedicated Routes)

Set up a route step for routing a request. Multiple route steps can be set.

You can also set up the circulars for each route step.

Adding Route Steps

Add a route step for the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

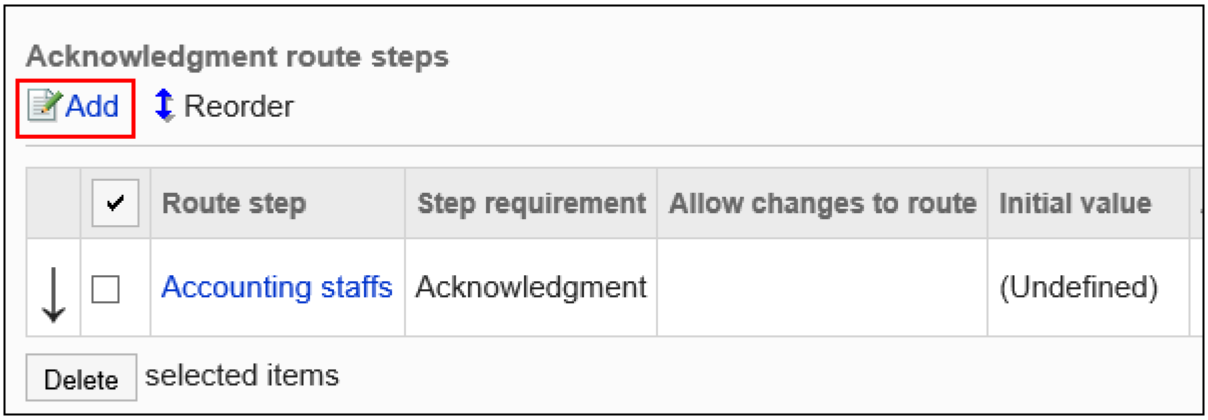
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

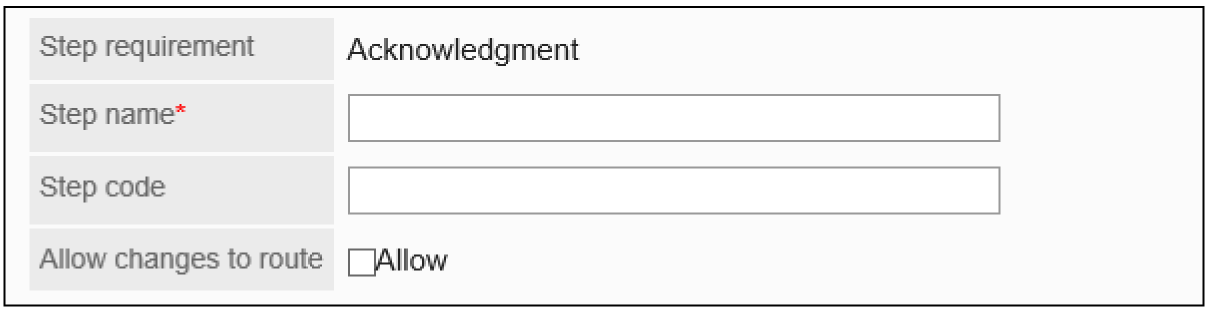
7. **On the "Request form Details" screen, click "Add" in the "route" field.**



8. **On the "Add route Step" screen, set the required items.**

9. **Confirm your settings and click "Save".**

Setting Items of Route Steps for Acknowledgement Routes

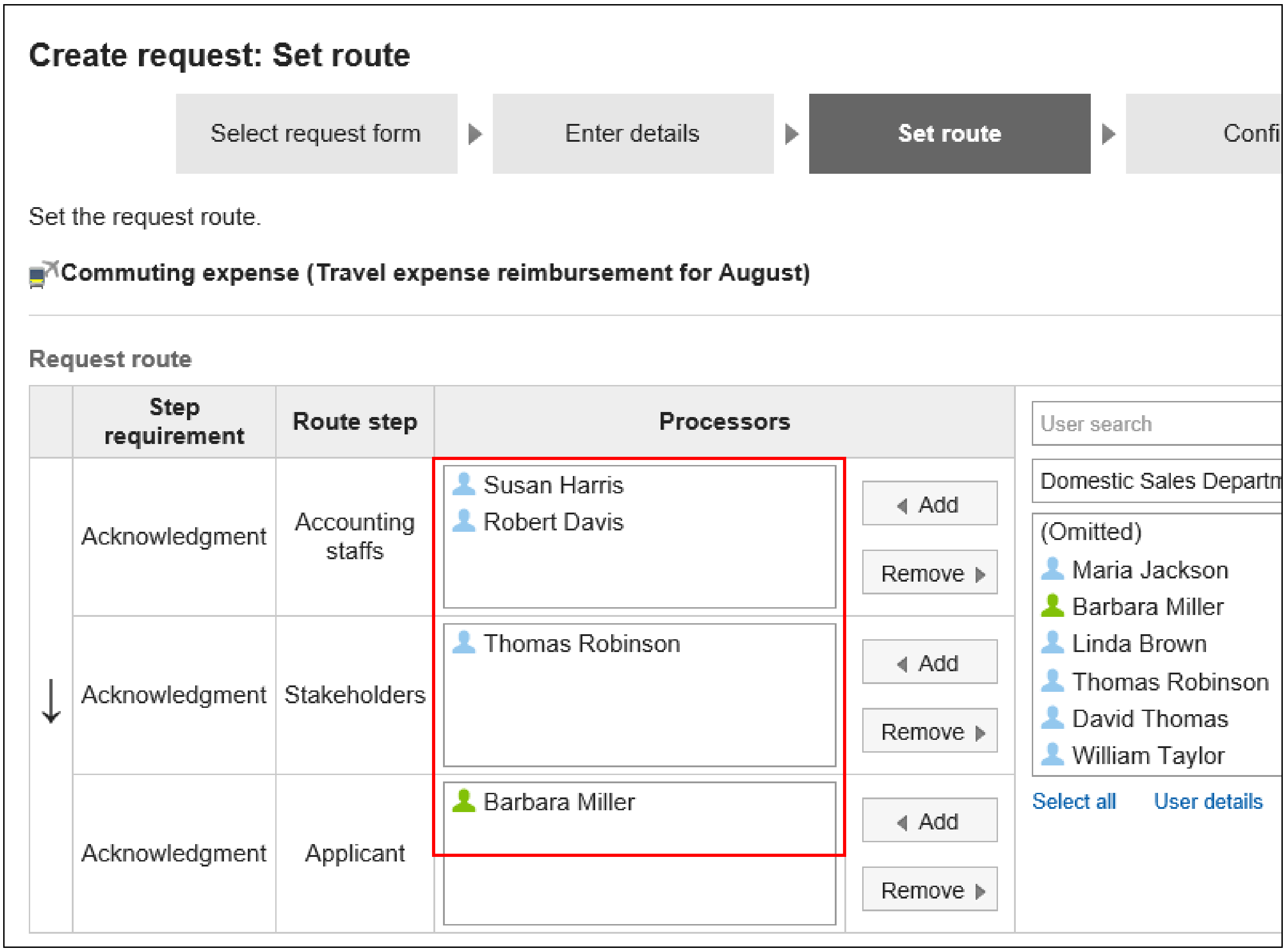


Item	Description
Route Step Name	Enter the route step name.
Step code	An item code is a unique code to identify items for JavaScript customization. If you do not use the JavaScript customization, you do not need to set the route step code. You can use single-byte alphanumeric characters, hyphens, and _ (underscores). When a step code is duplicated in one request form, an error occurs. Up to 100 characters can be entered in a code. If 101 or more characters are entered, the first 100 characters are registered.
Allow Route change	To allow a processor to reroute, select the "Allow" check box. If a route change is allowed, the processor can be changed by other processors in the same route step and in the subsequent route step, when processors are processed in this route step.

Setting Default Values for Route Steps

Setting the default value for the route step simplifies the job of the applicant.

Organization, user, or role.



Adding Default Values

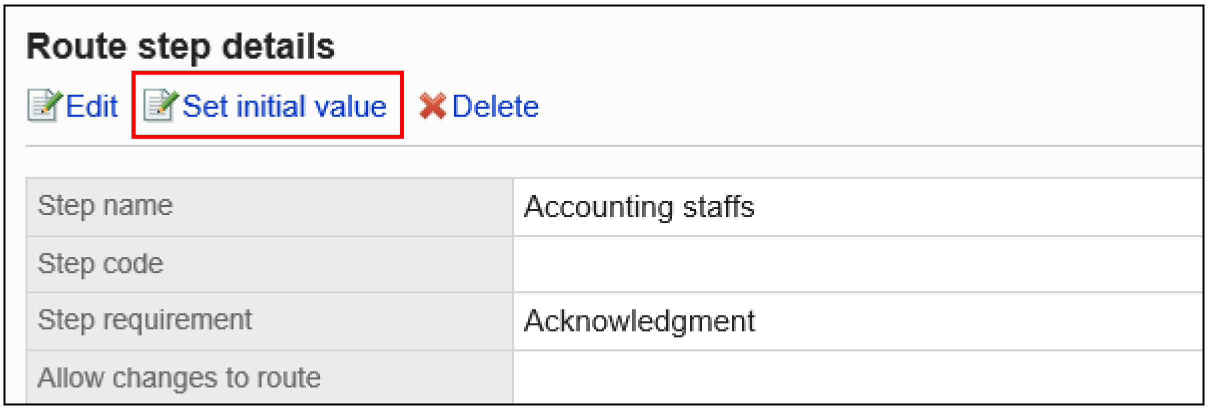
Adds the default value for the route step.

Steps:

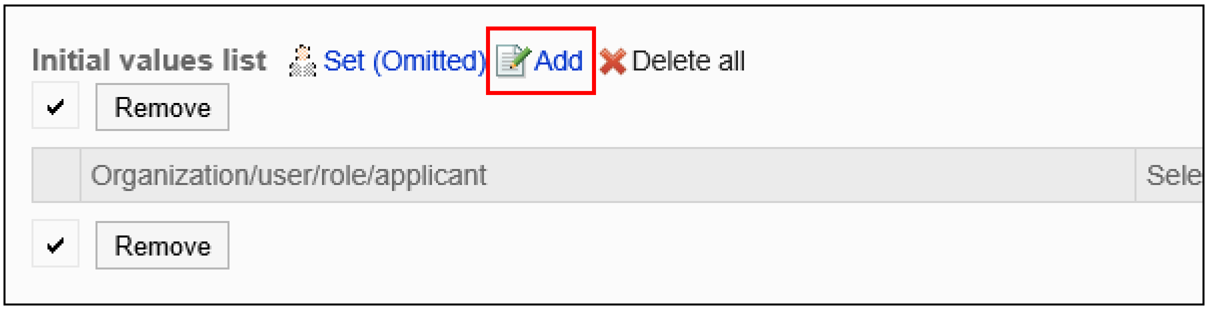
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Acknowledgement route".**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Add" in the default value list.**

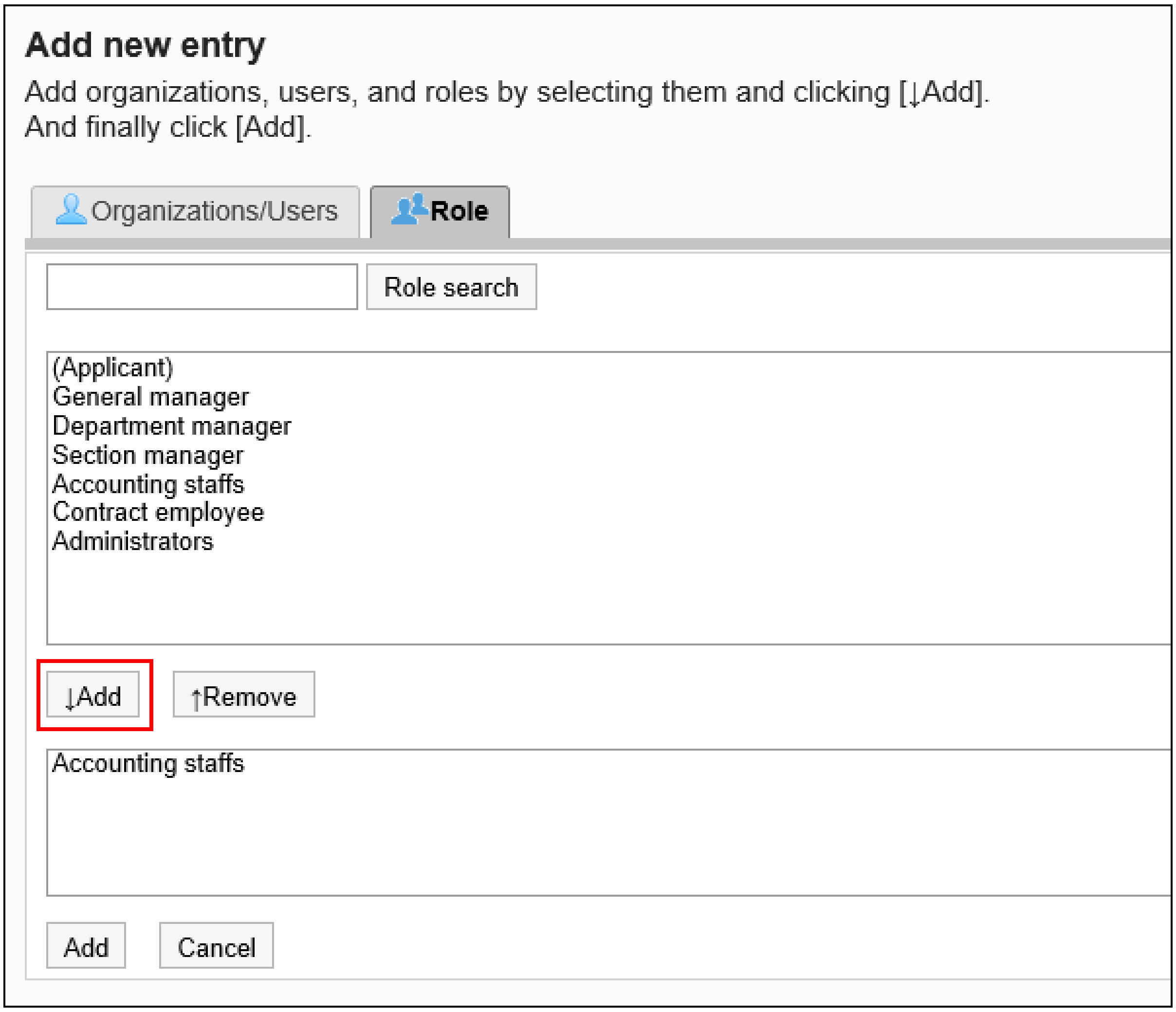


10. **On "Add default watchers" screen, select the organization, user, or role, and then click "Add".**

If you want to set the applicant as default, select "(Applicant)" from the role.

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



11. **Confirm your settings and click "Add".**

Setting Default Superior

When you add roles to the initial value of a route step, users who have the roles that you have set can display only the superior of the applicant when the user requests.
Superior is displayed as a "priority organization" of the applicant, or a user who belongs to the organization.

Users Shown as Superiors

If you have configured the superiors for the default value of a route step, the users shown as the superiors in the processor field are determined by the following conditions.

1. A user who belongs to the "priority organization" of the applicant and who has the specified role
2. A user who is a member of the organization that is higher in the "priority organization" of the applicant and who has the specified role

If there are any users who match condition 1, those users are displayed as the superiors in the processor field.
If there are no users who match the condition 1, users meeting condition 2 are displayed as the superiors in the processor field.

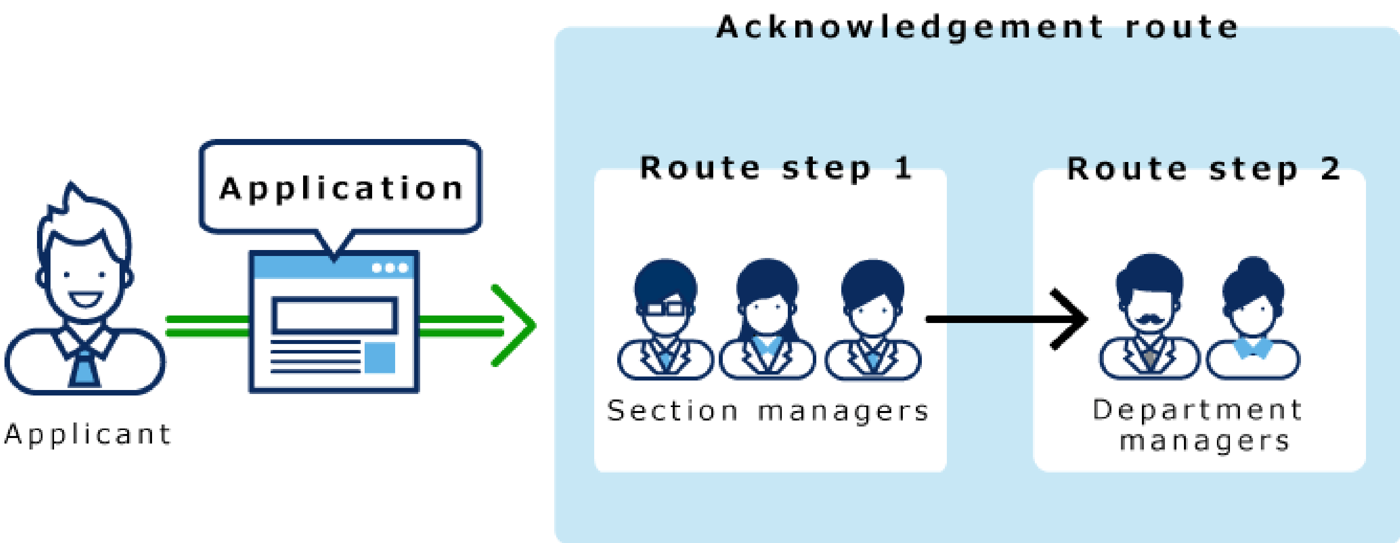
Image of Usage

This section describes how to create a request data for a user who is a member of the sales department.
The priority organizations of the applicants are the sales department.
The above-said applicant is the director of Sales department and one division manager. The Sales department manager has the role "manager" and the "Manager" section.

- Headquarters
  - Sales department
    - Sales department manager (Role: Department manager)
    - Sales Section 1
      - Sales section 1 manager (Role: Section manager)
      - Applicant
    - Sales Section 2

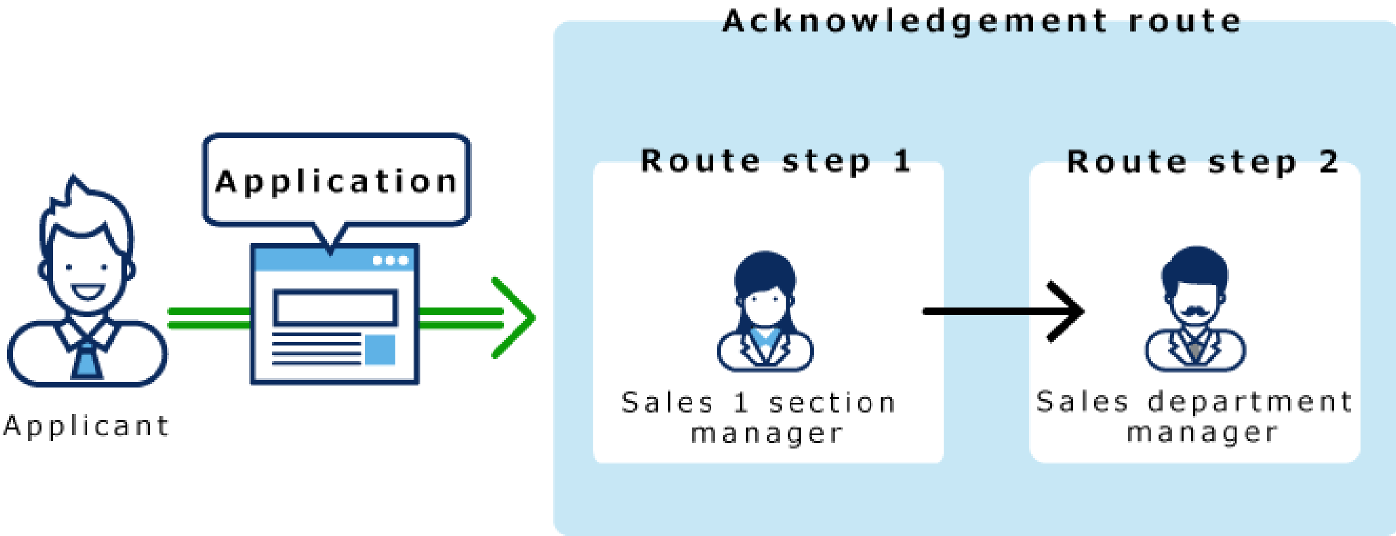
When you set the role of "manager" in the initial value of the route step 1 and the "manager" for the initial value of the route step 2, when you create the request data, all users belonging to each role will be set as processors.
The applicant must select his or her top length from among the processors.

Before superior:



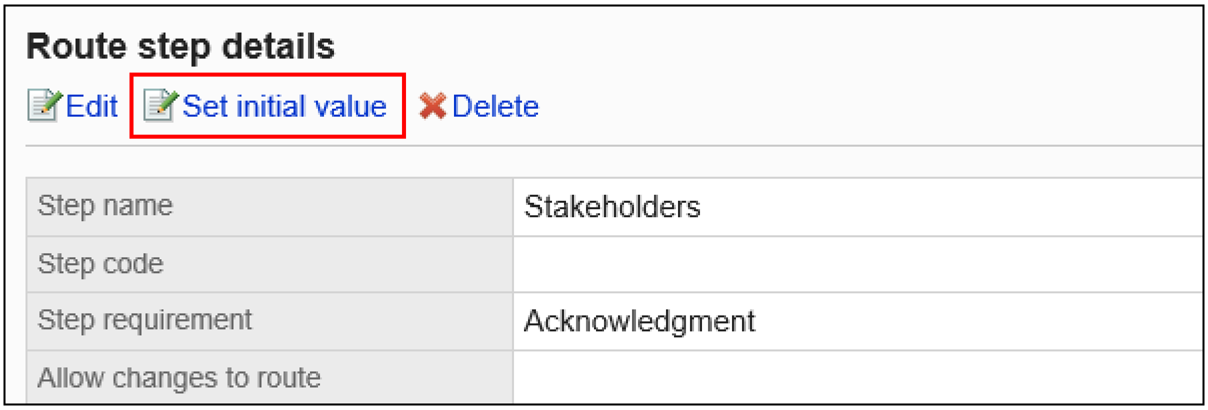
If you set superior in Route Step 1 and Step 2, only your superior is automatically set for the processor of each route step.

After setting superior:

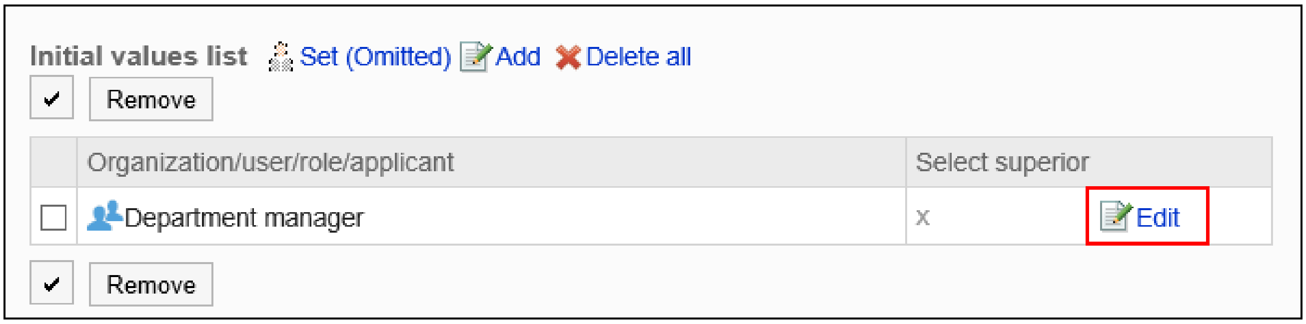


Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step in "Acknowledgement route".**
8. **On the "Route Step Details" screen, click "Set Default".**



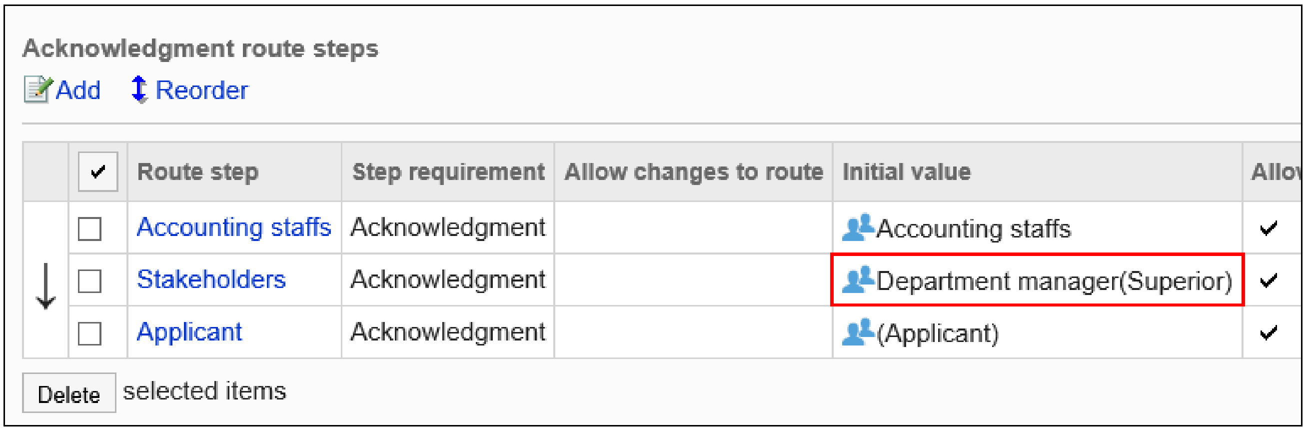
9. **On the screen to set default settings, click "Change" in the default value list for the role to set a superior.**



10. **On the "Change superior selection" screen, select the "Select the" check box.**

11. **Confirm your settings and click "Save".**

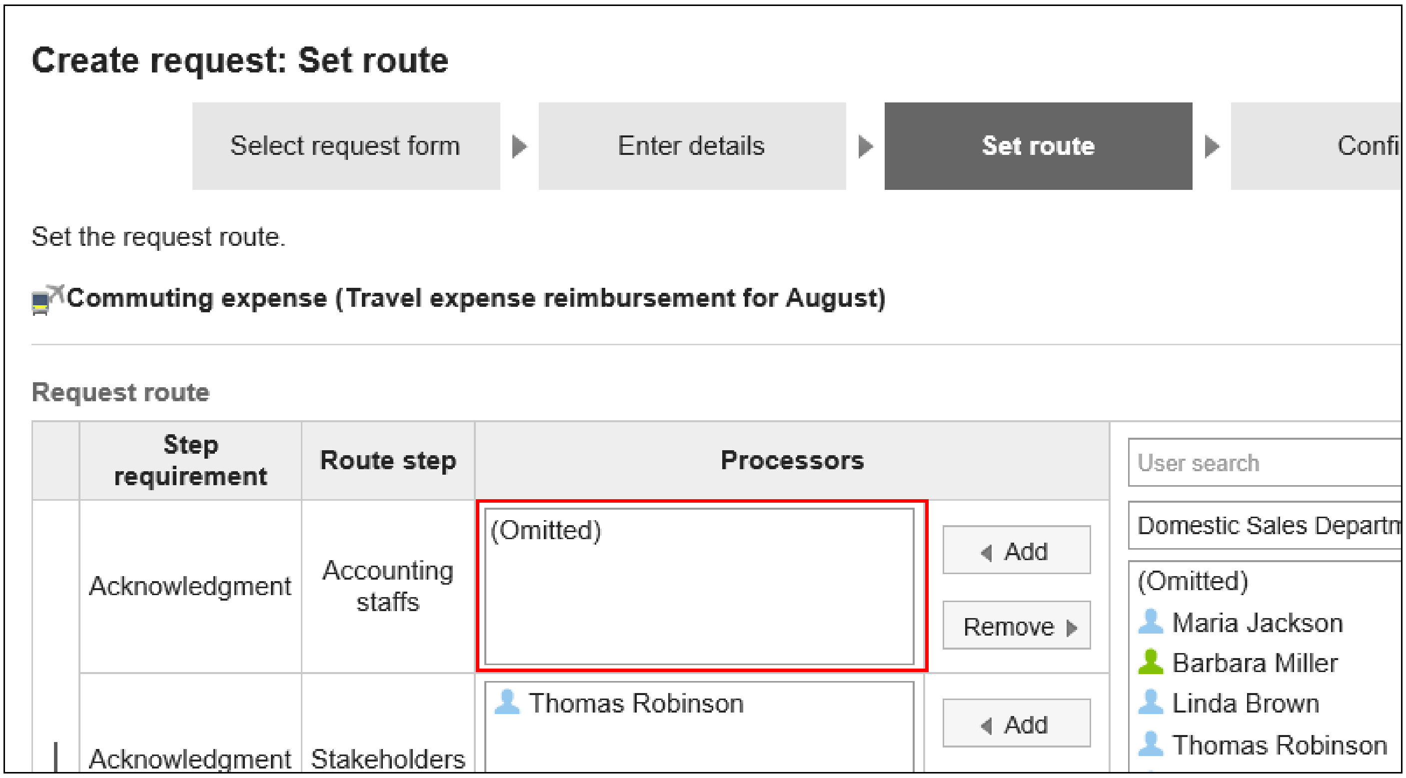
When you set a superior, "(superior)" is added after the role name on the screen for request form details.



Setting Default Value to "(omitted)"

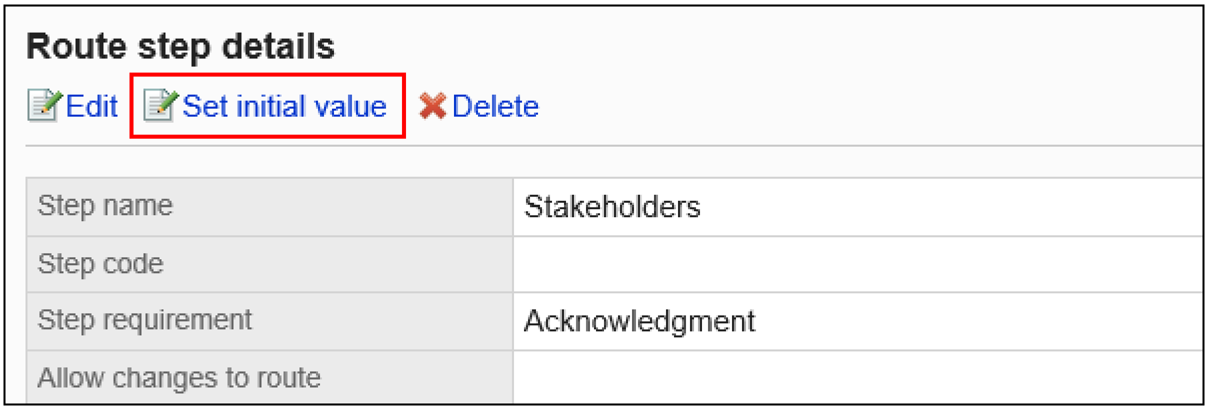
The default value can be set to "(omitted)" For a route step that is expected to have no processors.

A route step with a set of "(omitted)" skips the processing of the request data.

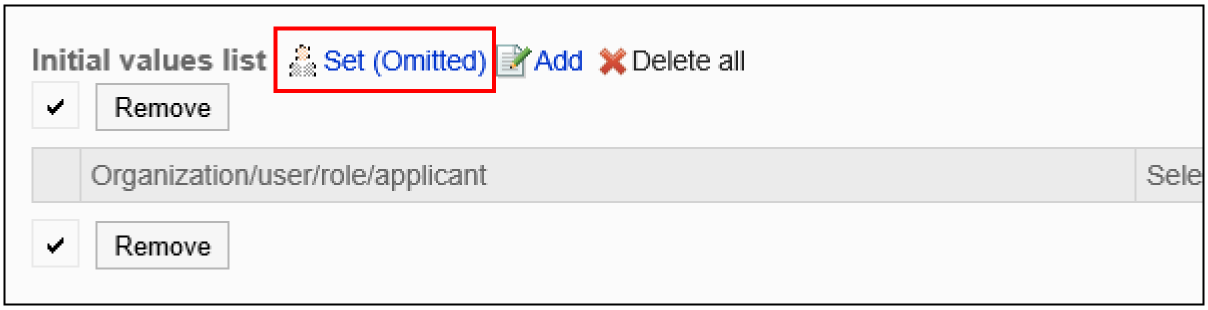


Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step in "Acknowledgement route".**
8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "(Omitted)" to set in the default value list.**



10. **Click "Yes" on the "(omitted)" screen.**

If you have already set the default value for this route step, delete all default values and delete "(omitted)".

Allowing Applicants to Change Default Values

When you create a request data, you can set whether to allow the applicant to change the default value of the route step.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

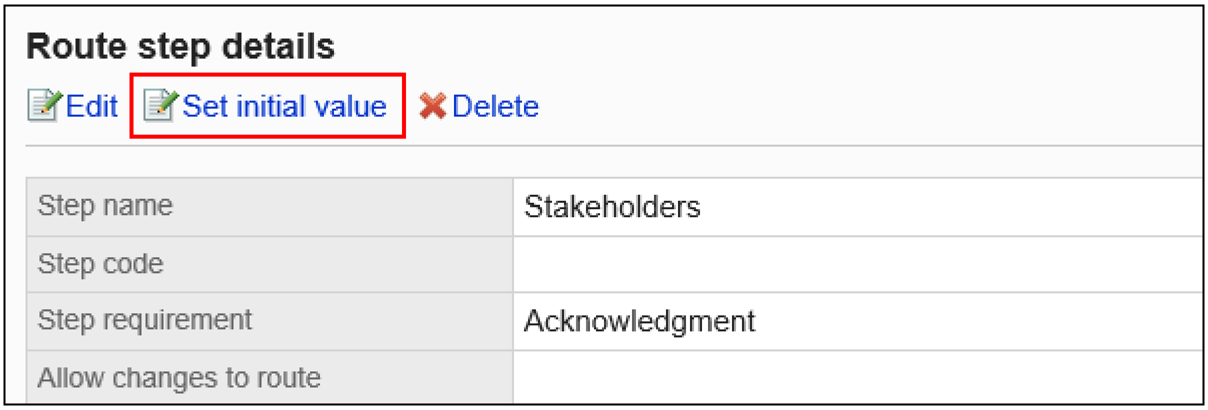
4. **Click "Workflow".**

5. **Click "Request Form" list.**

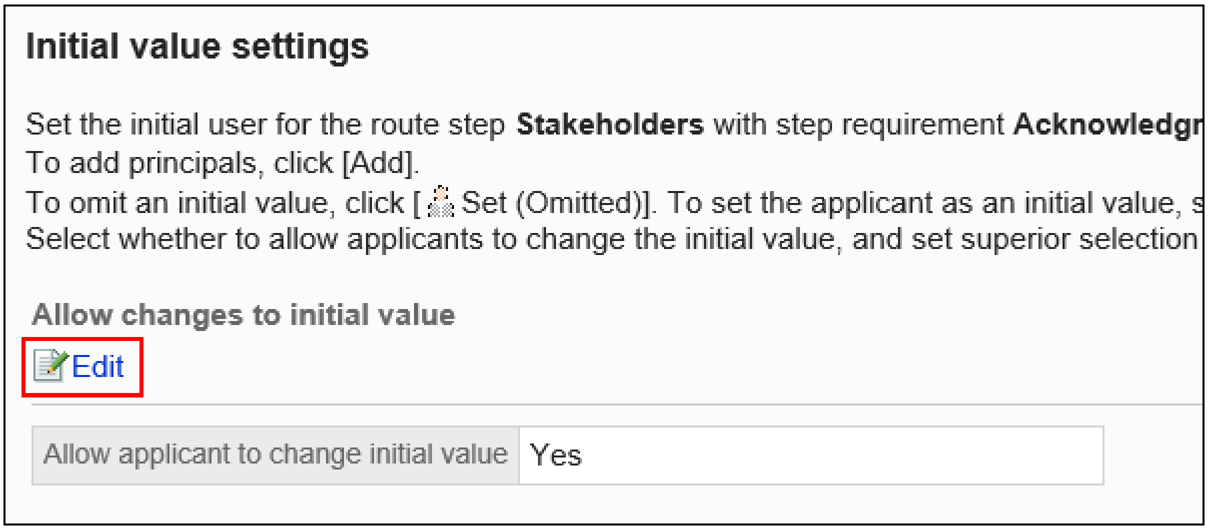
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Acknowledgement route".**

8. **On the "Route Step Details" screen, click "Set Default".**

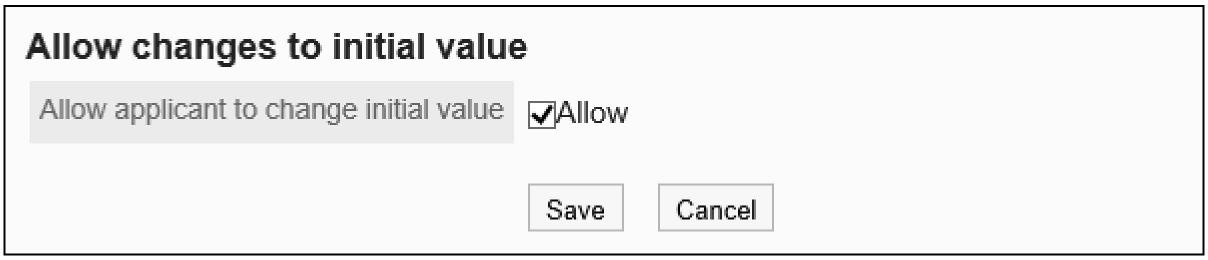


9. **On the screen to set default settings, click "Save" in the field to allow defaults to change.**



10. **On the "Allow Default change" screen, select the "Allow applicant to change default values" check box.**

Otherwise, clear the check box.



11. **Confirm your settings and click "Save".**

Selecting and Deleting Default Values

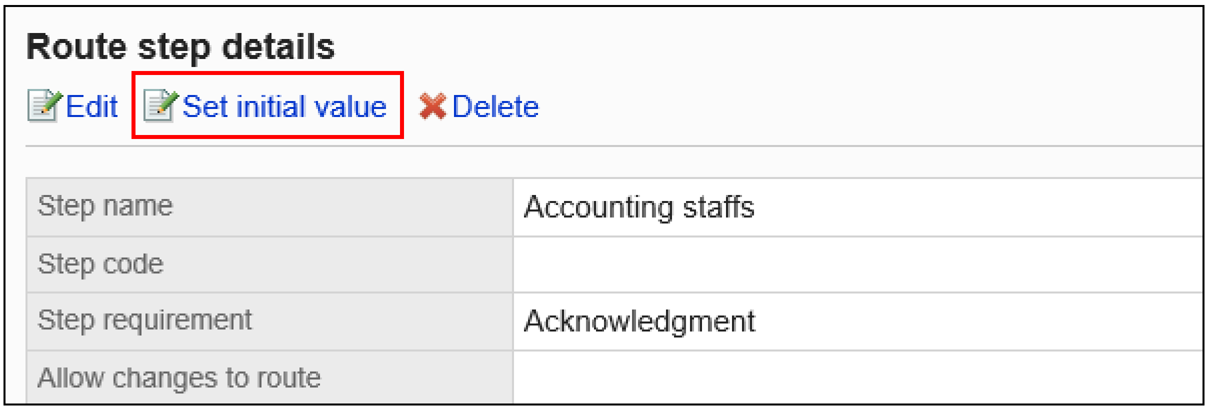
Select the default value that is set for the route step and delete it.

Caution

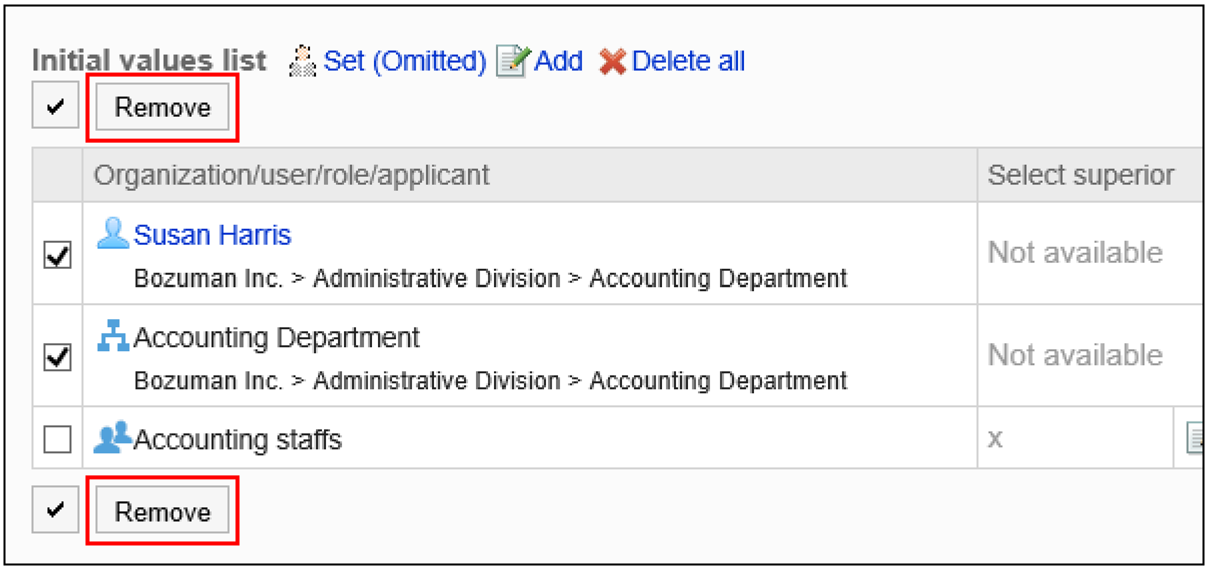
- The deleted default value cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step in "Acknowledgement route".**
8. **On the "Route Step Details" screen, click "Set Default".**



9. **In the default value list on the screen to set default settings, select the check box for departments, users, or roles to delete from the default values, and click "Delete".**



10. **Click "Yes" on "Delete default watchers" screen.**

Deleting All Default Values

Delete all default values for the route step.

Caution

- The deleted default value cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

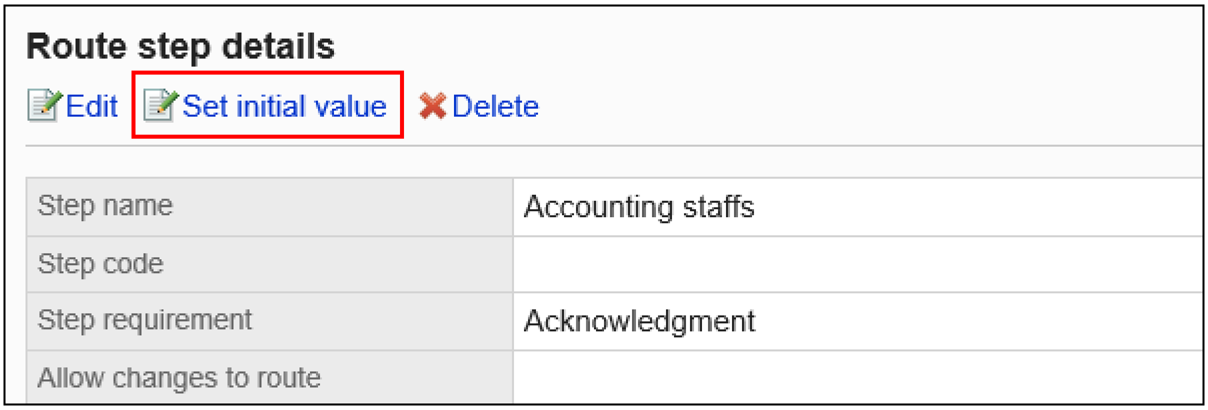
4. **Click "Workflow".**

5. **Click "Request Form" list.**

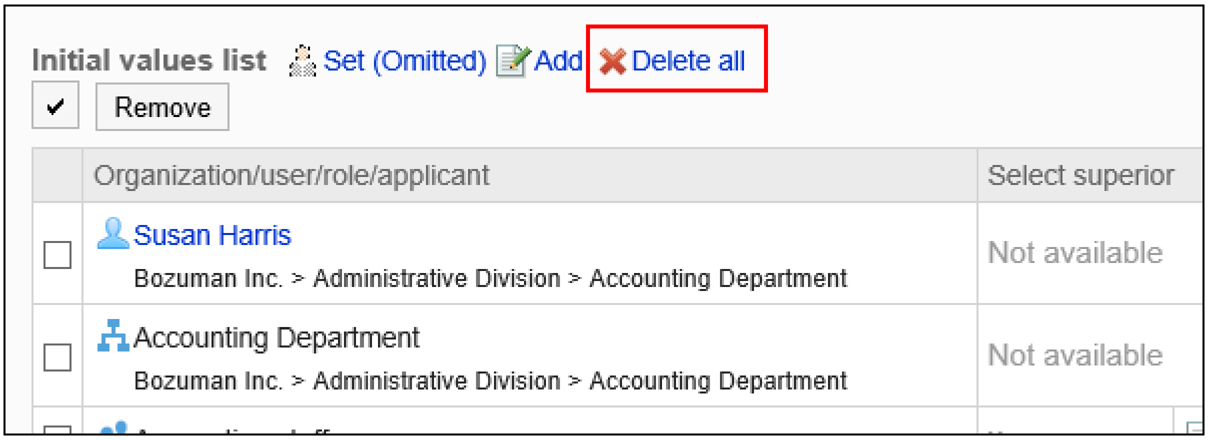
6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step in "Acknowledgement route".**

8. **On the "Route Step Details" screen, click "Set Default".**



9. **On the screen to set default settings, click "Delete all" in the default value list.**



10. **Click "Yes" on "Delete all default watchers" screen.**

Changing Route Steps

Change the route step settings for the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

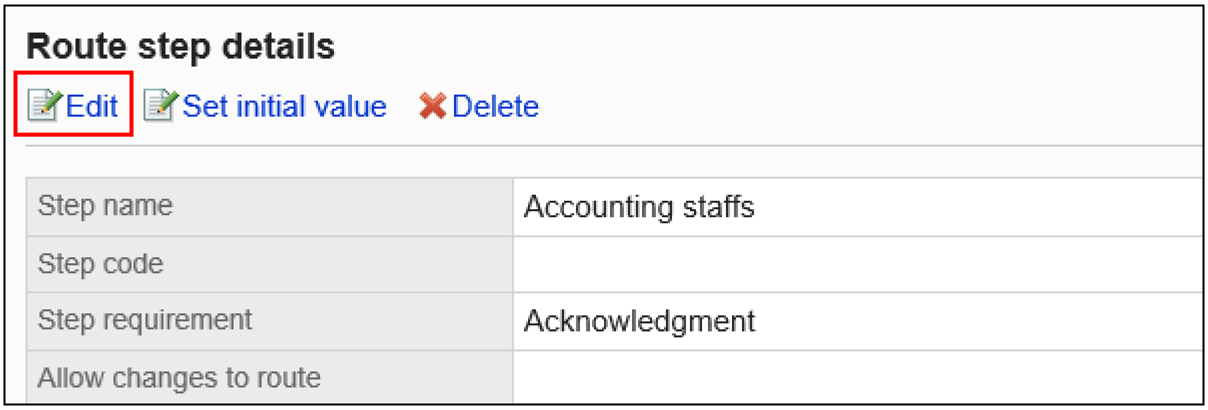
4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click the route step name of the route step to change in "Acknowledgement route".**

8. **On the route step details screen, click "Save".**



9. **On the "Change route step" screen, set the required items.**

   For details, refer to route step settings in the routing route.

10. **Confirm your settings and click "Save".**

Reorder Route Steps

Reorder route steps in the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

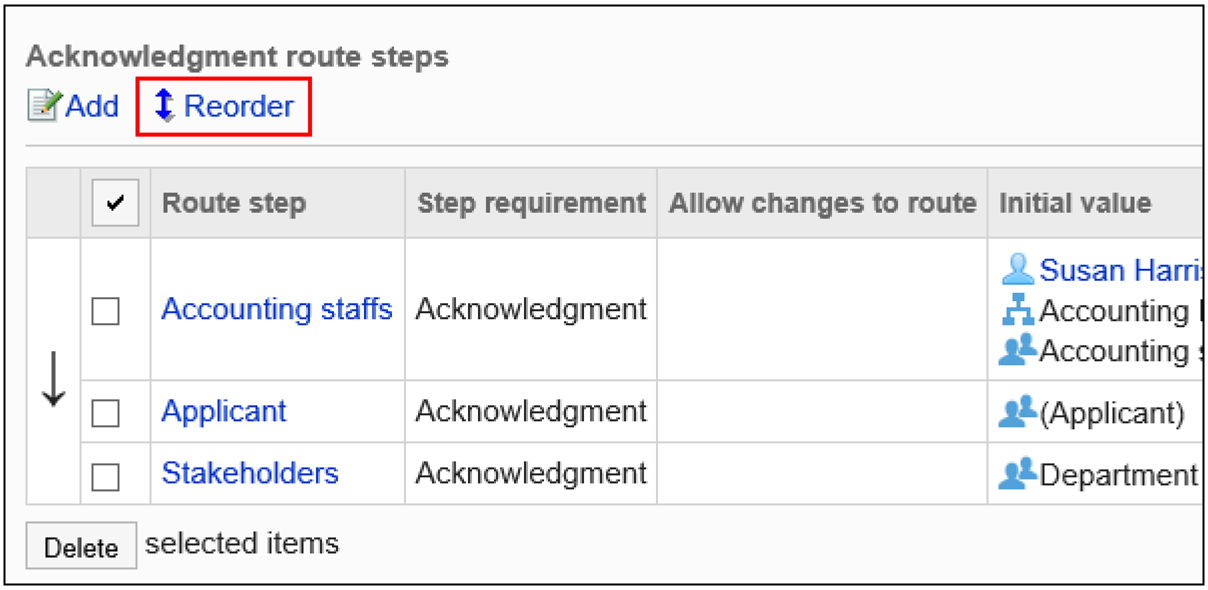
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

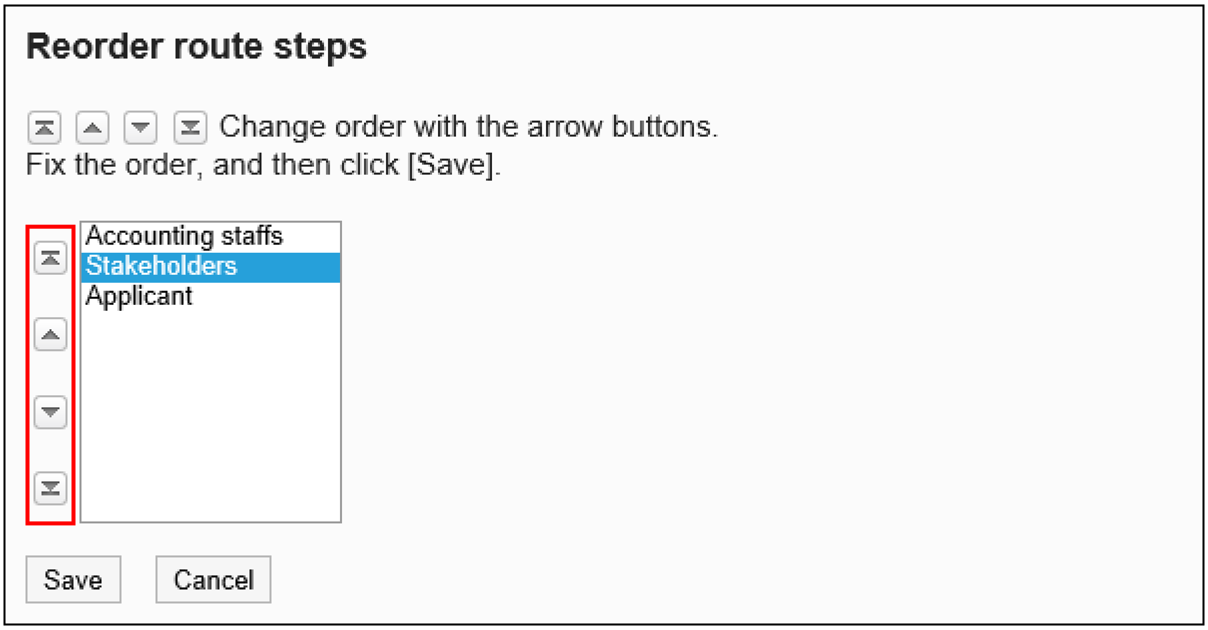
5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click "Reorder" in "Acknowledgement route".**



8. **On the Reorder Route steps screen, reorder route steps.**



9. **Confirm your settings and click "Save".**

Deleting Route Steps

Delete the route step for the routing route.

Caution

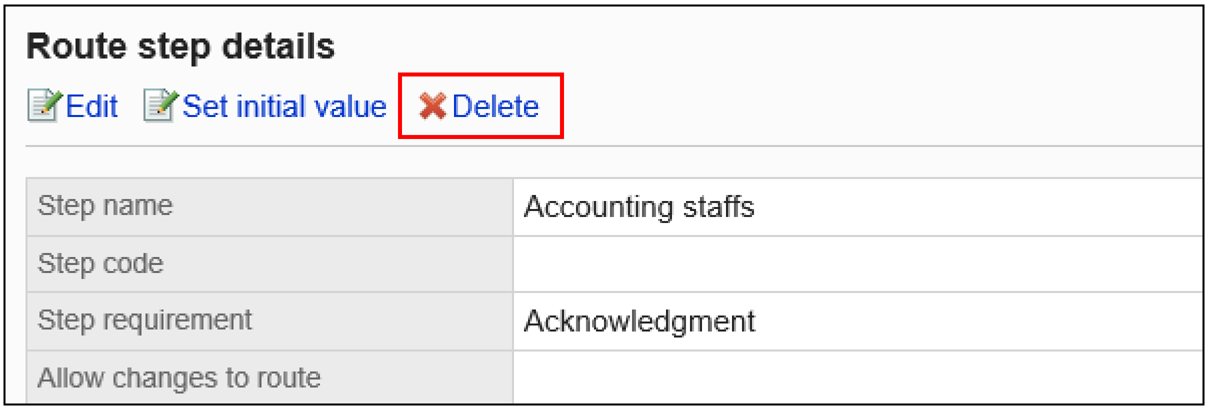
- The deleted route step cannot be restored.

Deleting Route Steps One by One

Delete the route step for the routing route.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the route step name of the route step to delete in "Acknowledgement route".**
8. **On the "Route Step Details" screen, click "Delete".**



9. **Click "Yes" on the "delete route steps" screen.**

Deleting Multiple Route Steps in Bulk

Select the route step for the routing route you want to delete, and delete it in bulk.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, under "Acknowledgement route", select the check box for the route step to delete, and then click "Delete".**

8. **Click "Yes" on the "delete route steps" screen.**

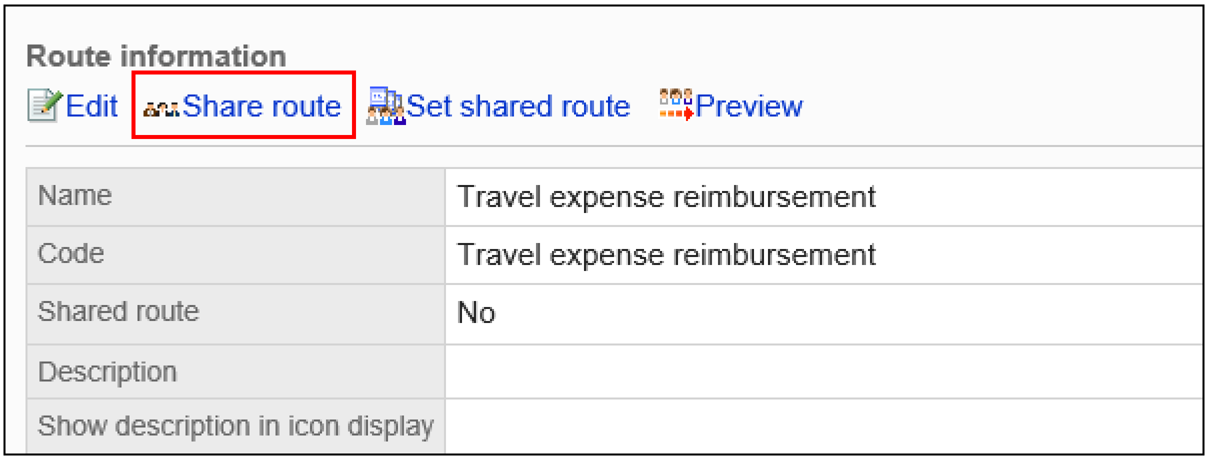
2.13.7.6. Sharing Dedicated Routes

Share a private route and change to a shared route.

Cannot change from a shared route to a private route. If you change to a shared route, the route cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to share the route.**
7. **On the screen for request form details, click to share this route in "Route Information".**



8. **Click "Yes" on the "route sharing" screen.**

Note

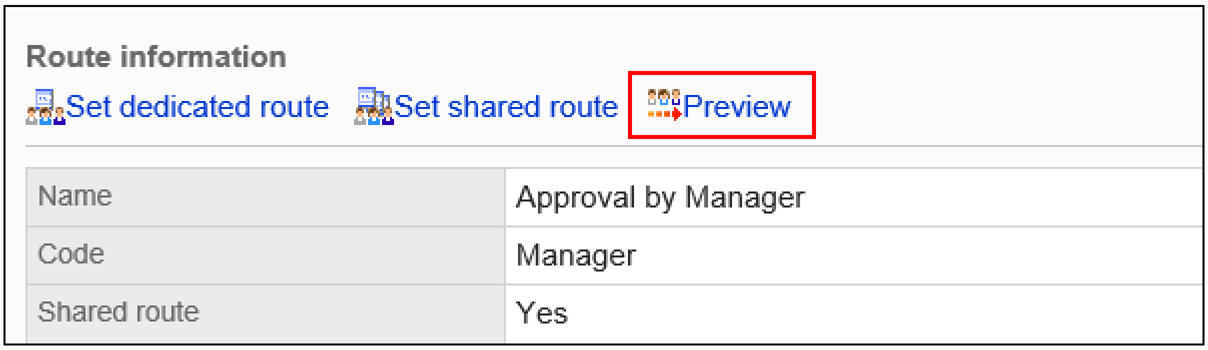
- You can also change the dedicated route to a shared route from the route details screen of the route list.

2.13.7.7. Route Preview

Confirm the request route view on the preview screen. However, route branching conditions are not reflected in the preview screen.
If you have set the default value for the route step, you can check the display of the processors for each route step for each user.

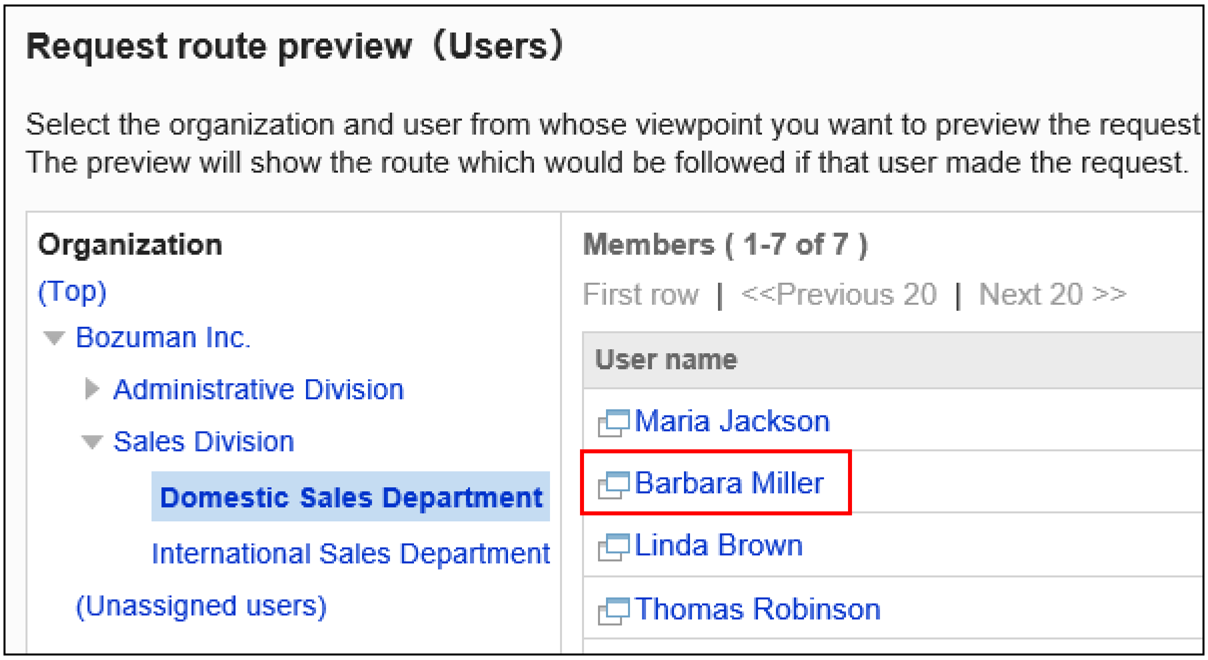
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" screen, select a category, and then click the request form name of the request form to see the appearance of the form.**
7. **On the screen for request form details, click to preview routes in "Route Information".**



8. On the "Request Route preview (user list)" screen, select the user who you want to confirm the display.

The preview screen opens in a new tab or window.



9. On the "Request Route preview" screen, confirm the display of the route.

If you have set the default value for the route step, users of the default value will be displayed in each route step.

On the preview screen, buttons such as "Add" and "Cancel" cannot be used.

2.13.7.8. Referencing a Request Form Using a Dedicated Route

Refer to the request form using the private route.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

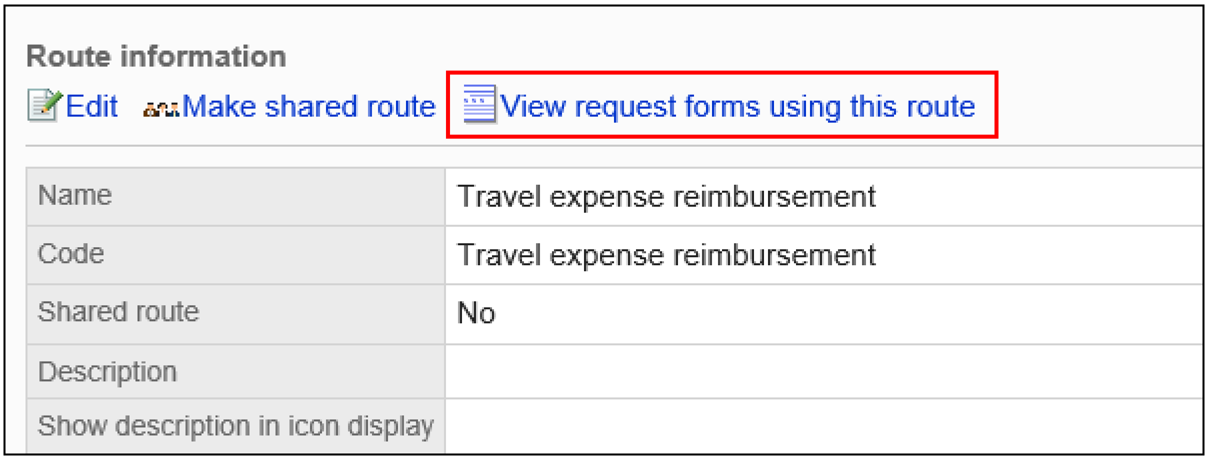
3. Select "Application settings" tab.

4. **Click "Workflow".**

5. **Click the route list.**

6. **On the route list screen, select the dedicated routes tab, and click the route name of the dedicated route.**

7. **On the route details screen, click the item to view request form used in route information.**



8. **On the "Request Form" screen, check the request form that uses the route.**

2.13.8. Setting up Route Branching

This section describes the route branching settings.

What Is a Route Branching?

This function allows a route to be routed by omitting some route steps of a configured route, depending on the value entered in a particular field in the request form.

Flow of Route Branching

Before you start setting route branchings, you can write down the information below to work with them smoothly.

- On what conditions to branch a route
- Who is the approver or the user who is required to branch
- What kind of process flow is best for branching?

- Are items used for route branching conditions set in the request form?

If you have already prepared the above details, start with Step 4.

Steps:

Step 1 Determines the request form to set the route branching.

Step 2 Determines which items (branching items) are required for route branching.

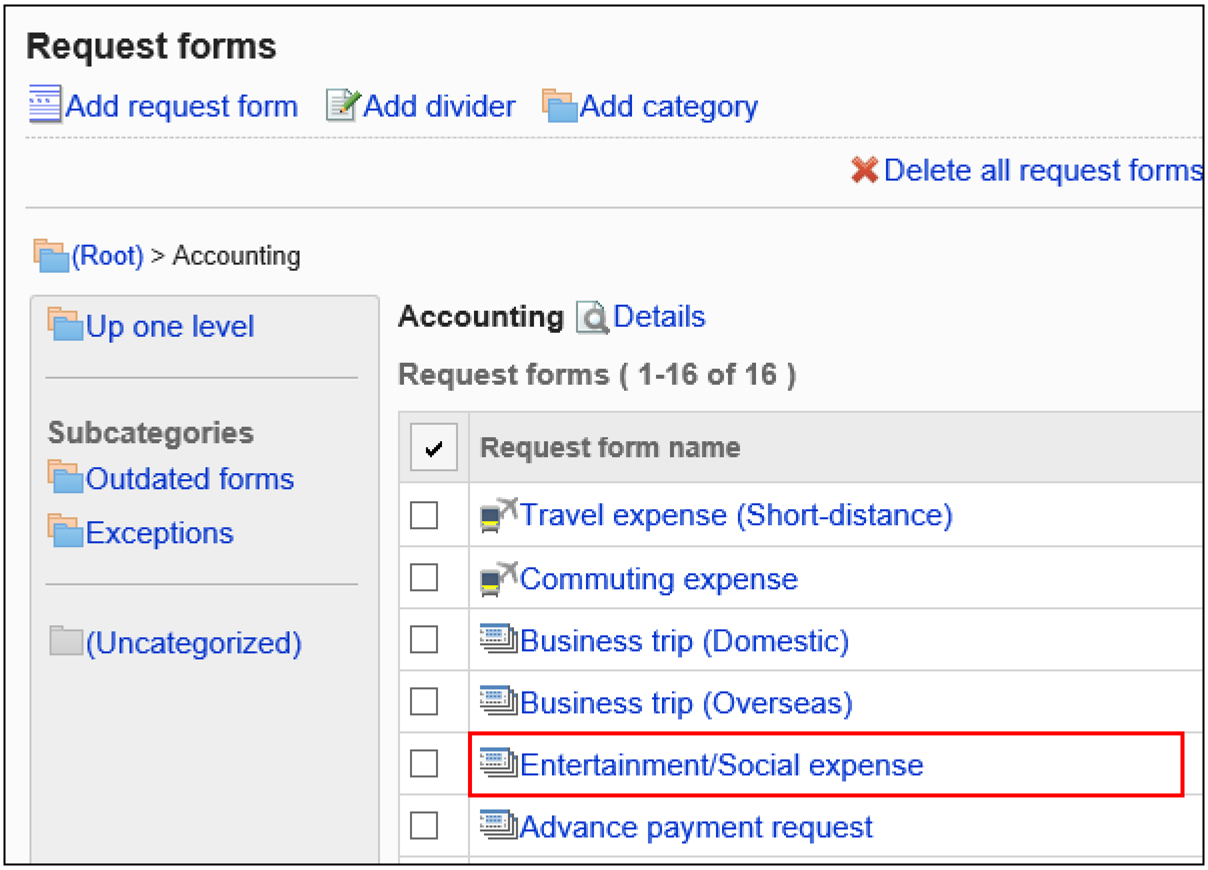
Step 3 You can organize the route in whatever conditions you want to branch.

Step 4 Set branching items for the request route.

Step 5 Set the branching conditions for the route and the route step to use for the branching route.

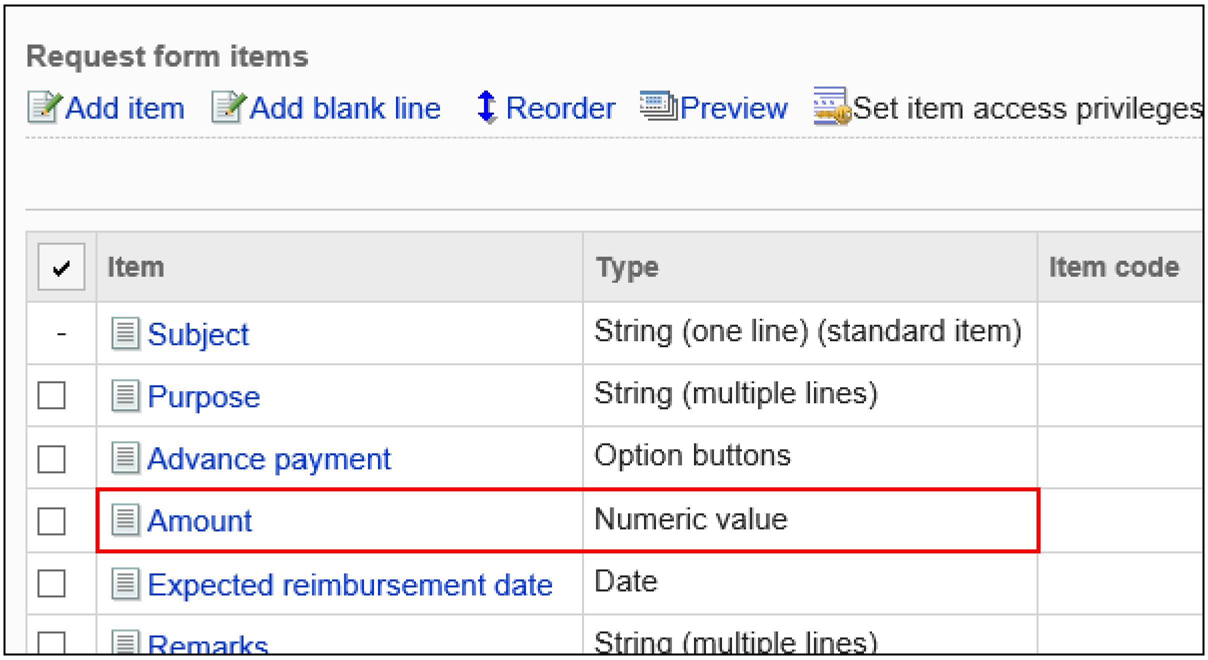
Step 6 Make the request form available to users.

Step 1 **Determines the request form to set the route branching.**



Step 2 **Determines which items (branching items) are required for route branching.**

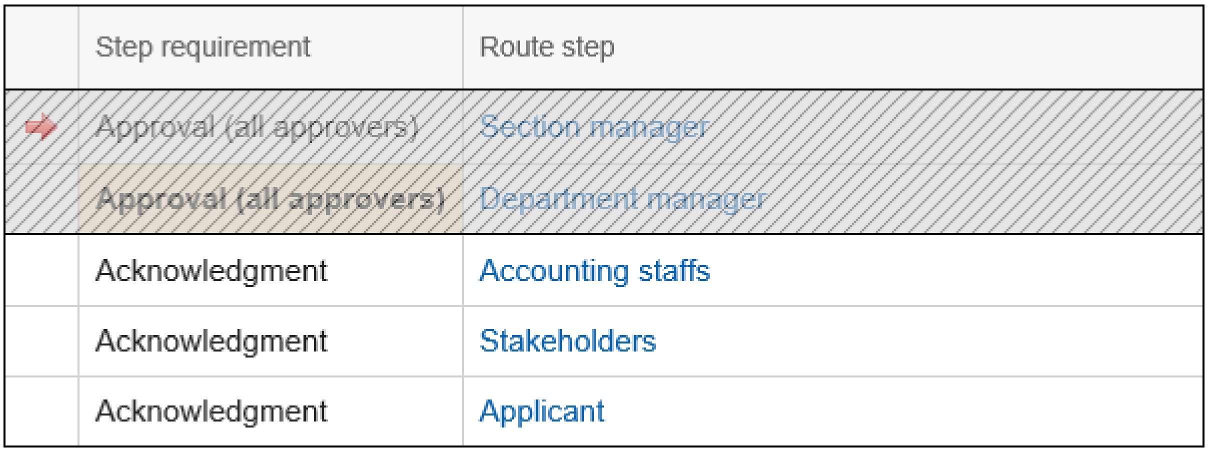
Check whether the item type can be set for branching items(1451Page).



Step 3 **You can organize the route in whatever conditions you want to branch.**

Example:

- If the amount is less than 20,000 yen, the approval of the manager and the manager is omitted.



	Step requirement	Route step
	Approval (all approvers)	Section manager
	Approval (all approvers)	Department manager
	Acknowledgment	Accounting staffs
	Acknowledgment	Stakeholders
	Acknowledgment	Applicant

- If the amount is less than 50,000 yen, omit the approval of the manager.

	Step requirement	Route step
➡	Approval (all approvers)	Section manager
	~~Approval (all approvers)~~	~~Department manager~~
	Acknowledgment	Accounting staffs
	Acknowledgment	Stakeholders
	Acknowledgment	Applicant

- If the amount is more than 50,000 yen, omit the circulation of the parties concerned.

	Step requirement	Route step
➡	Approval (all approvers)	Section manager
	Approval (all approvers)	Department manager
	Acknowledgment	Accounting staffs
	~~Acknowledgment~~	~~Stakeholders~~
	Acknowledgment	Applicant

Step 4 **Set branching items for the request route.**

For details, refer to Setting up route branching information(1450Page).

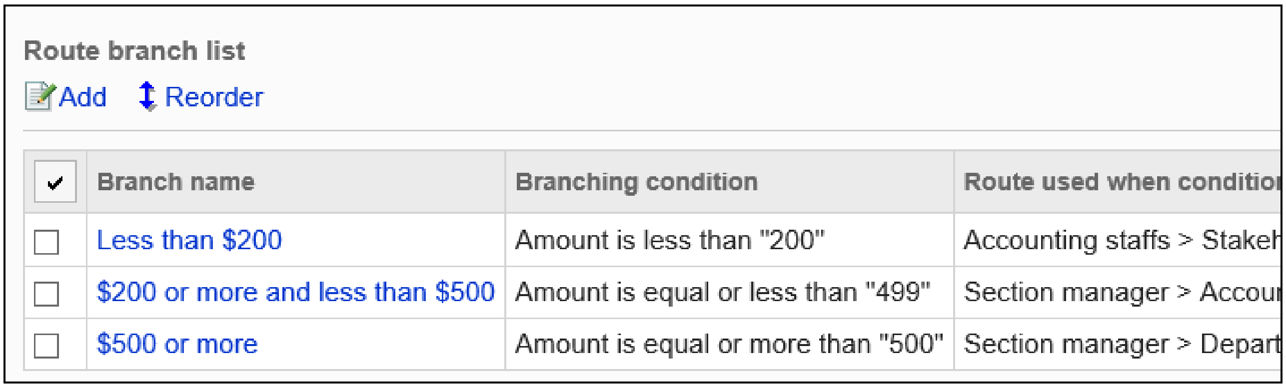
Route branch information

Edit Delete

Item type	Numeric value
Branch name	Amount

Step 5 **Set the branching conditions for the route and the route step to use for the branching route.**

For details, refer to Setting route branching conditions(1453Page).



Route branch list

Add Reorder

✔	Branch name	Branching condition	Route used when conditio
☐	Less than $200	Amount is less than "200"	Accounting staffs > Stakeh
☐	$200 or more and less than $500	Amount is equal or less than "499"	Section manager > Accou
☐	$500 or more	Amount is equal or more than "500"	Section manager > Depart

Step 6 **Make the request form available to users.**

For details, refer to Enabling Request Forms(1355Page).

Route branching conditions are not reflected in the preview screen. You can use the actual request form to create the request data and confirm that the route is displayed according to the contents of the request data.

If it is not, the request form is available to the user.

References

- Setting up Route branching information(1450Page)
- Setting route branching conditions(1453Page)

2.13.8.1. Setting up Route Branching Information

From the fields in the Request form, set an item (branching item) with conditions for the route branching.

The request form must have an item that can be set for branching fields.

Item Types That Can Be Set for Branching Items

- Menu
- Radio button
- Check box
- Number:
  If the edit privilege for the "numeric value" item has been granted to approvers, this "numeric value" item cannot be specified as the route branching item.
- Automatic calculation
  If the "automated calculation" item uses a "numeric value" item whose edit privilege has been granted to approvers, this "automated calculation" item cannot be specified as the route branching item.

To check the user rights of the number field, refer to Setting Access Permissions for Items(1391Page).

Caution

- We recommend that you disable the request form(1356Page) so that users are not available until the operation is completed.

Note

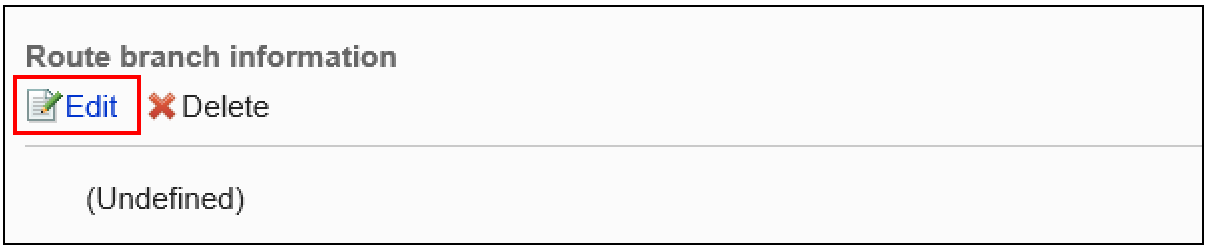
- Only one item can be set for a branching item. A combination of branching fields cannot be set.
- The route branching information cannot be shared with other request forms. If you have applied a shared route, you must also set up a route branching for each request form.
- You cannot change the route branching information that you have set. If you want to change branching fields, delete them, and then set the route branching information.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**

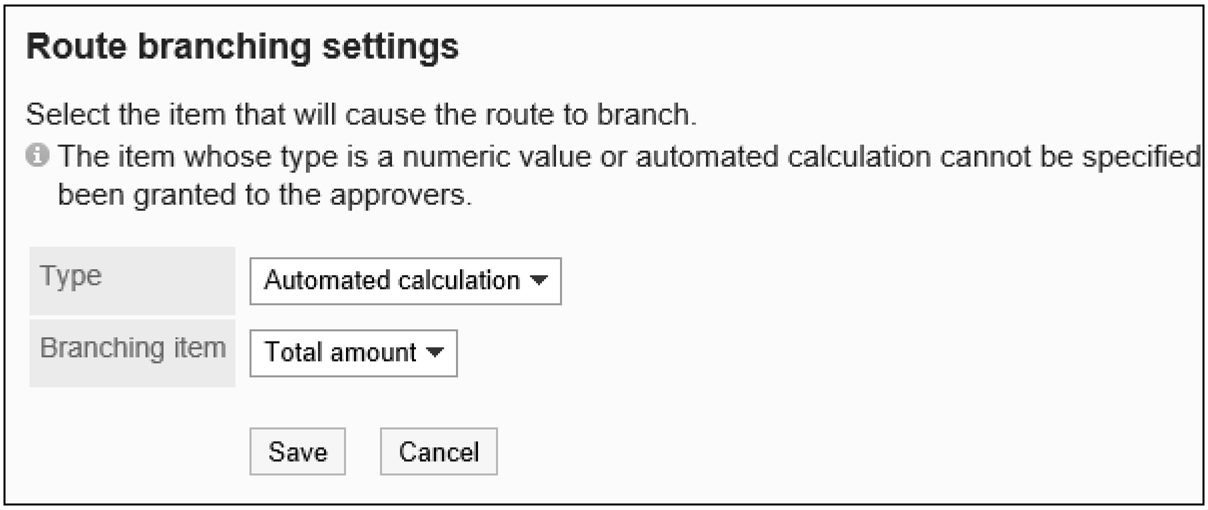
6. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to set route branching information.**

7. **On the screen for request form details, click "Set" in the route branching information.**



8. **On the "Route Branching information Settings" screen, set the conditions for route branching.**

- Item type:
  Select an item type for the route branching condition.
- Branching items:
  Displays the item names of the items using the selected item type. Select an item for the route branching condition.



9. **Confirm your settings and click "Apply".**

Deleting Route Branching Information

Delete route branching information.

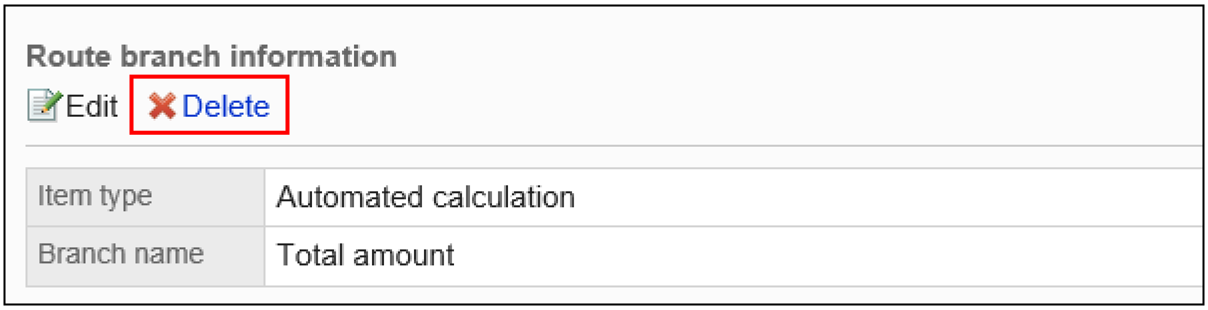
Deleting route branching information also deletes all the branching conditions that you set.

Caution

- After deleting route branching information, they cannot be restored.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to delete the route branching information.**
7. **On the screen for request form details, click "Delete" in the route branching information.**



8. **Click "Yes" on the screen to delete application route branching information.**

2.13.8.2. Setting up Route Branching Conditions

Specify branching conditions and route steps.

Adding Route Branching Conditions

You can set the conditions for branching routes and the contents of the branches.

The route branching conditions are applied in descending order from the "Route branching conditions list".

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

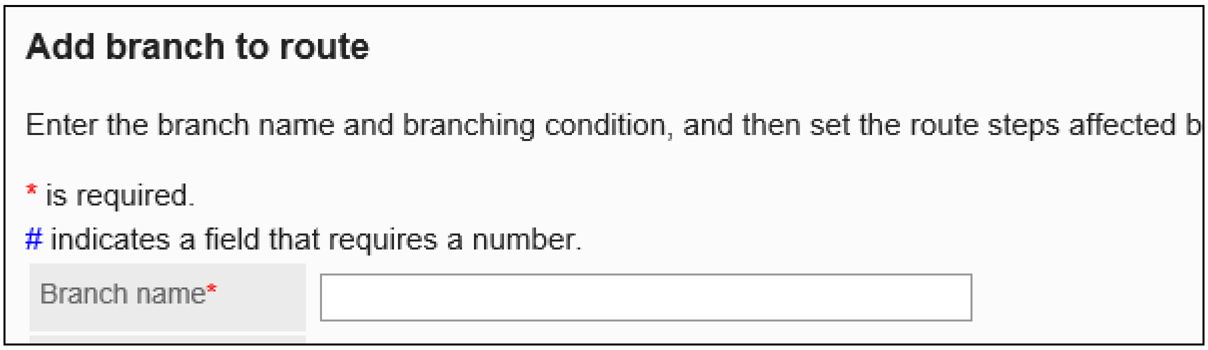
5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click "Add" in the route branching conditions list.**

8. **On the "Add branching conditions for Request route Step" screen, enter the "Route branching name" field.**

The route branching name must be set.

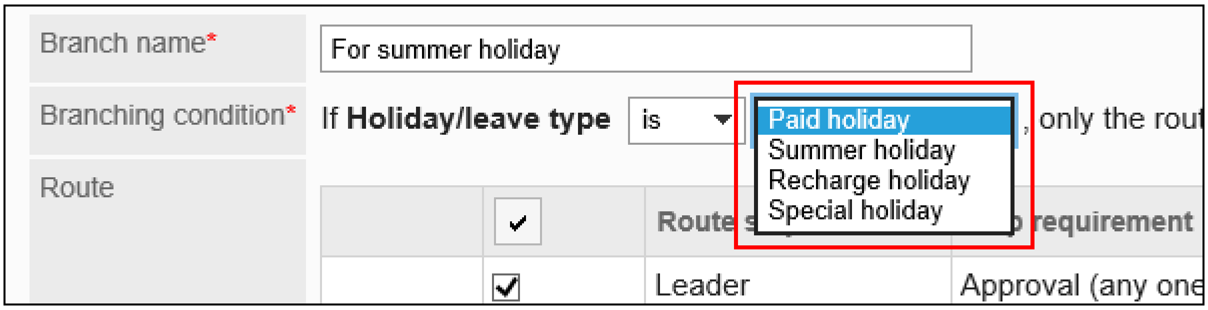


9. Set the branching conditions field.

Branching conditions vary depending on the item type.

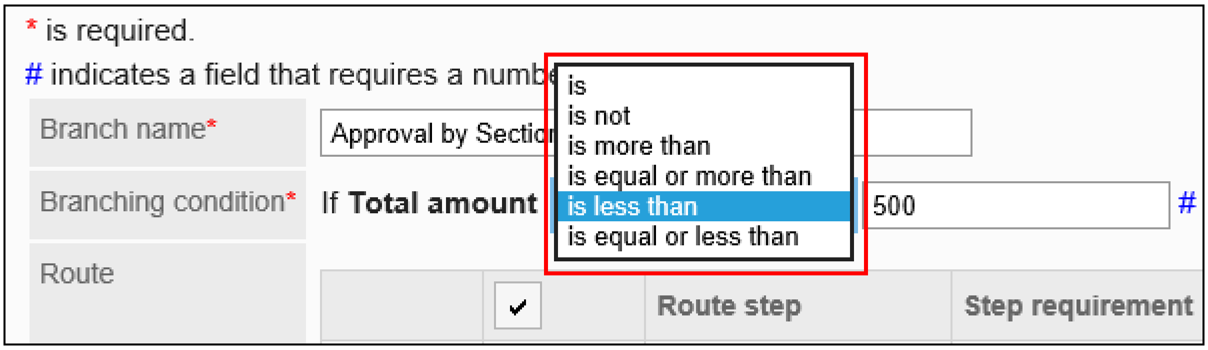
- Menu:

  Set the branching conditions in comparison with the choices that you have selected in the menu and the choices that you have set here.



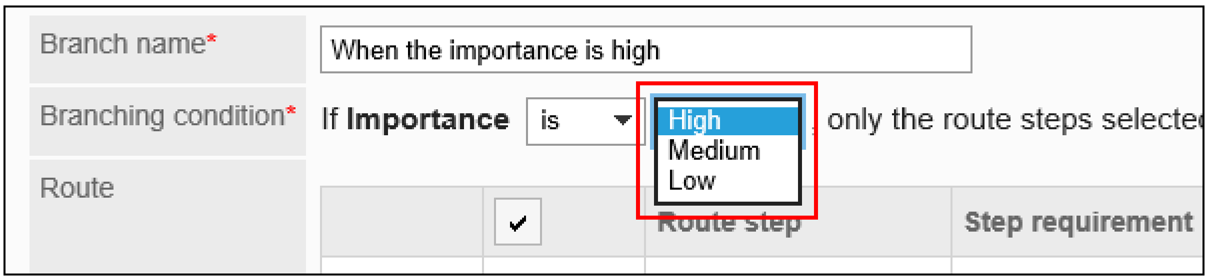
- Numeric or automatic calculation:

  You can set branching conditions in a comparison between the value entered by the applicant, or the value calculated in the request form, and the value entered here.



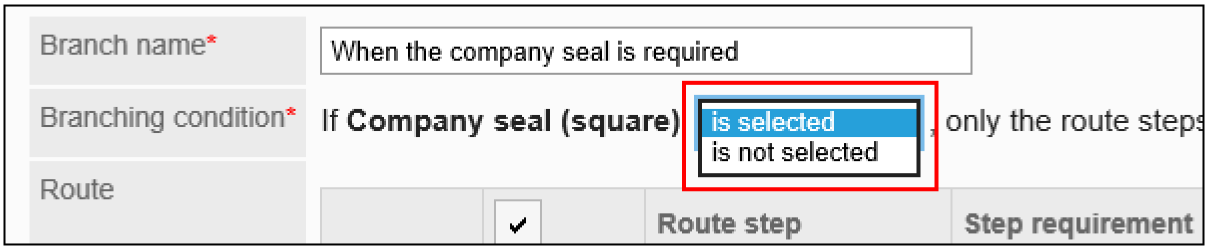
- Radio button:

  You can set branching conditions in a comparison between the choices selected by the radio buttons and the choices you set here.

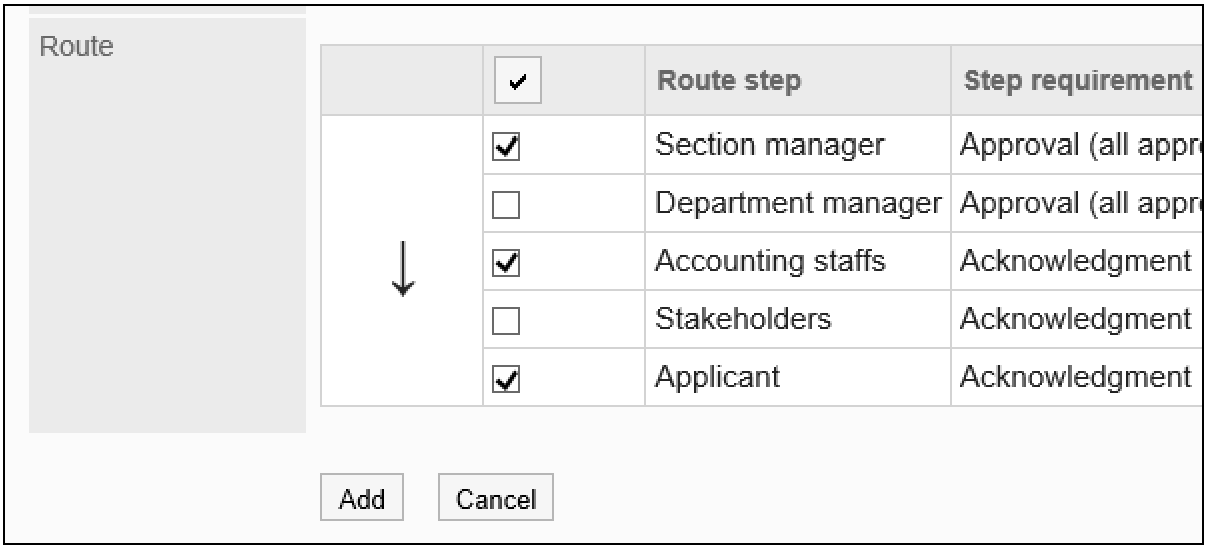


- Check boxes

  Set branching conditions whether or not the applicant has selected a check box.

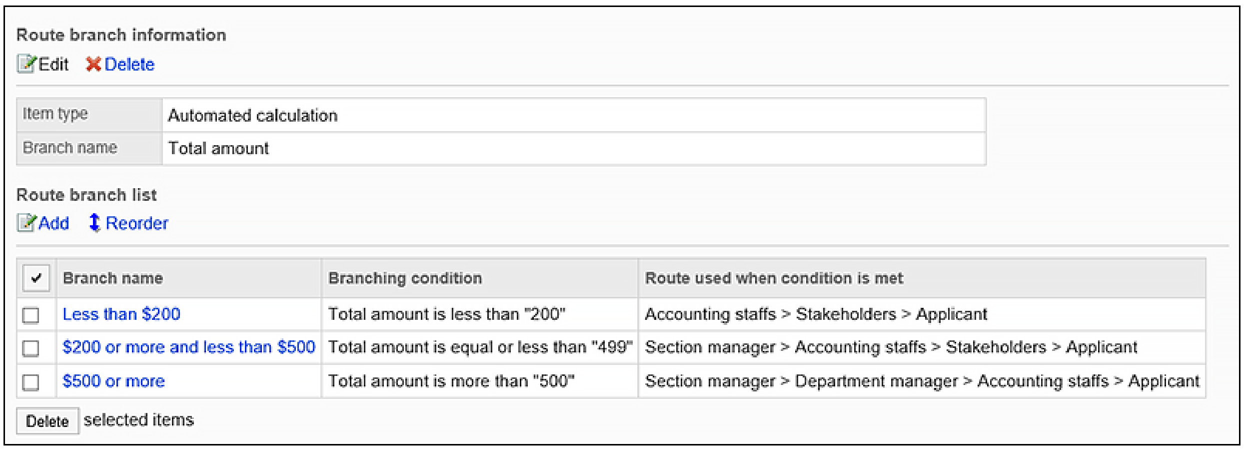


10. **In the "Route" field, clear the check box for the route step that you want to omit if the conditions set for branching conditions are met.**



11. **Confirm your settings and click "Add".**

- Example of branching a route according to the amount of money



Route branch information

Edit Delete

Item type	Automated calculation
Branch name	Total amount

Route branch list

Add Reorder

	Branch name	Branching condition	Route used when condition is met
	Less than $200	Total amount is less than "200"	Accounting staffs > Stakeholders > Applicant
	$200 or more and less than $500	Total amount is equal or less than "499"	Section manager > Accounting staffs > Stakeholders > Applicant
	$500 or more	Total amount is more than "500"	Section manager > Department manager > Accounting staffs > Applicant

Delete selected items

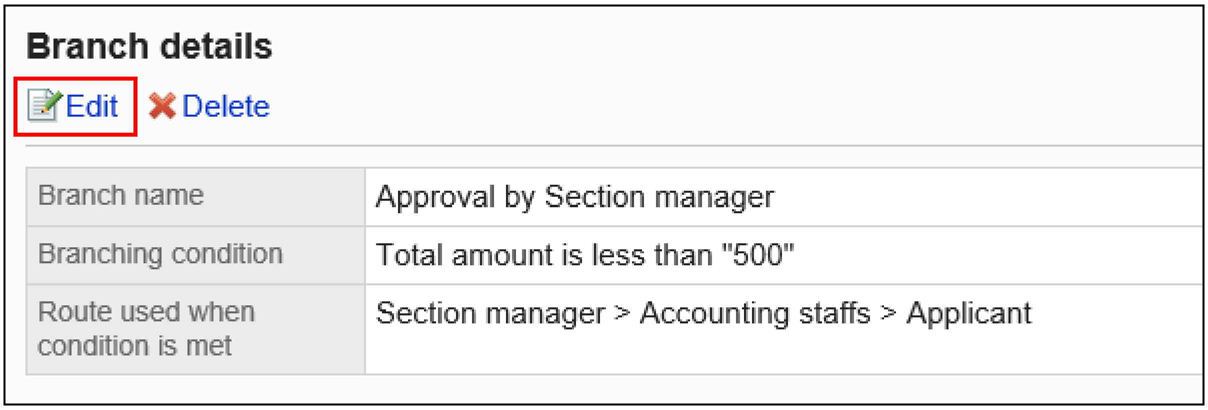
- Example of branching a route according to the organization of affiliation

Changing Route Branching Conditions

Change the settings for route branching conditions.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the branch name of the route to change in the route branching conditions list.**
8. **On the "Request Route step Details" screen, click "Edit".**



9. **On the "Change branching conditions for request route step" screen, set the required items.**

10. **Confirm your settings and click "Save".**

Reorder Route Branching Conditions

Reorder route branching conditions.

Route branching conditions are applied in descending order from the "Route branching conditions list".

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

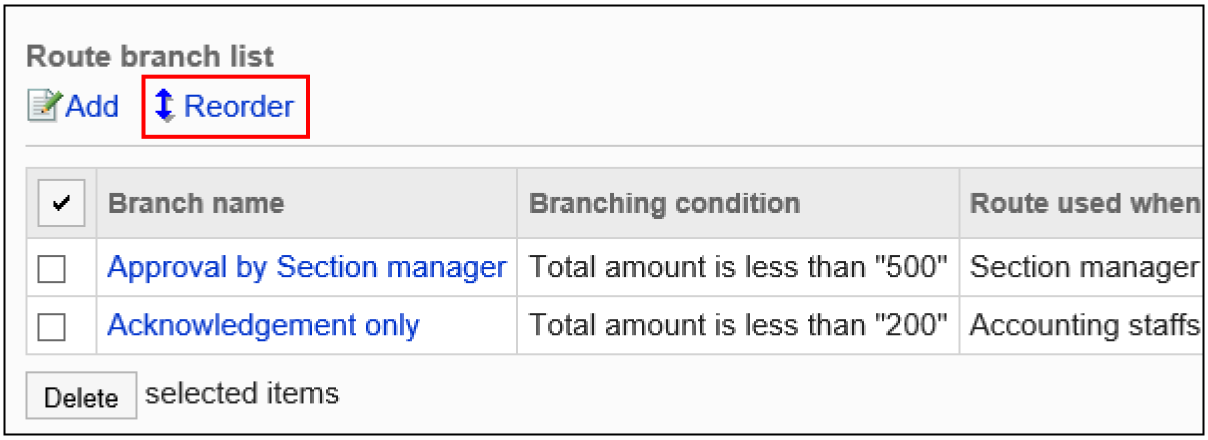
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

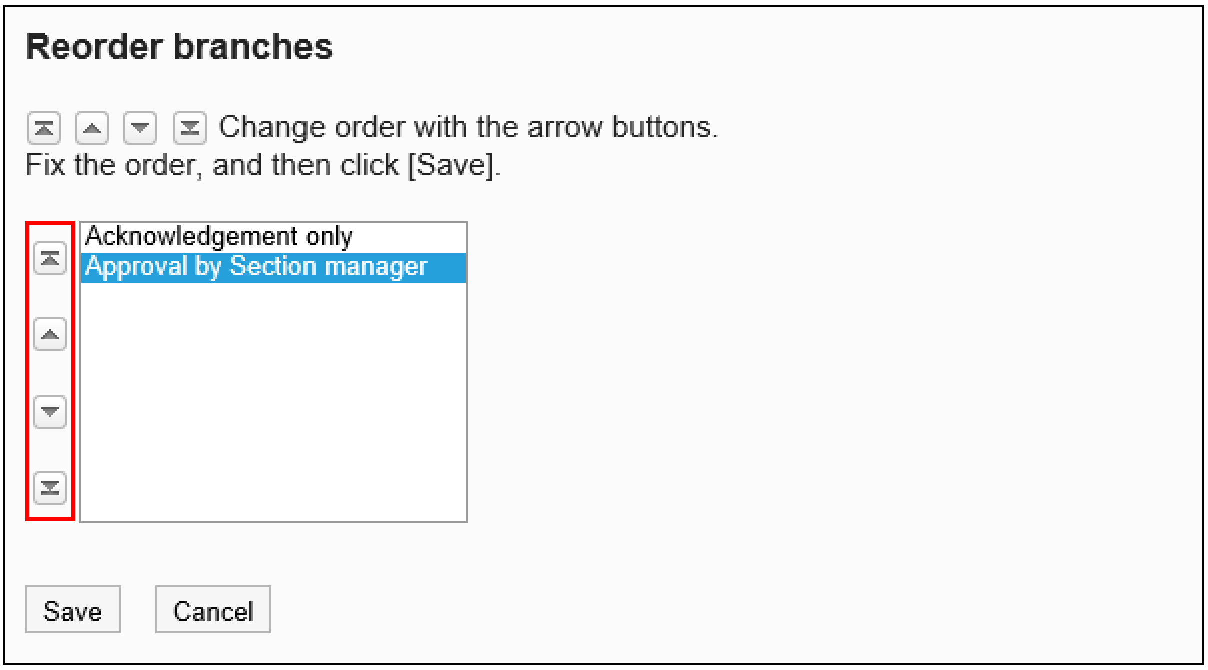
5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, click "Reorder" in the route branching conditions list.**



8. **On the "reorder branching conditions in the request route step" screen, reorder route branching conditions.**



9. **Confirm your settings and click "Save".**

Deleting Route Branching Conditions

Delete route branching conditions.

Caution

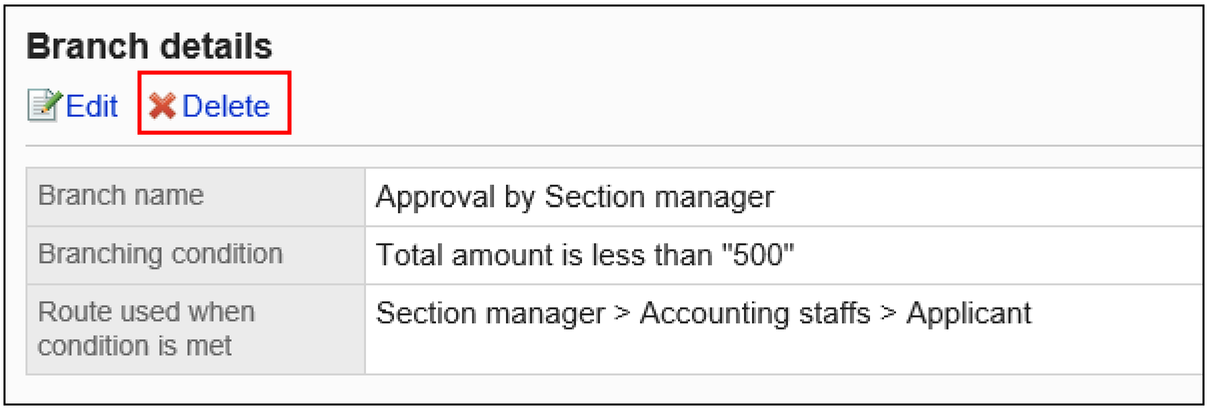
- The deleted route branching conditions cannot be restored.

Deleting Route Branching Conditions One by One

Delete the route branching conditions one at a time.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the "Request Form" list screen, select a category and click the request form name.**
7. **On the screen for request form details, click the branch name of the route branching condition to delete.**
8. **On the "Request Route step Details" screen, click "Delete".**



9. **Click "Yes" on the "delete branching conditions for request route steps" screen.**

Deleting Multiple Route Branching Conditions in Bulk

Select the route branching conditions you want to delete, and delete them all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

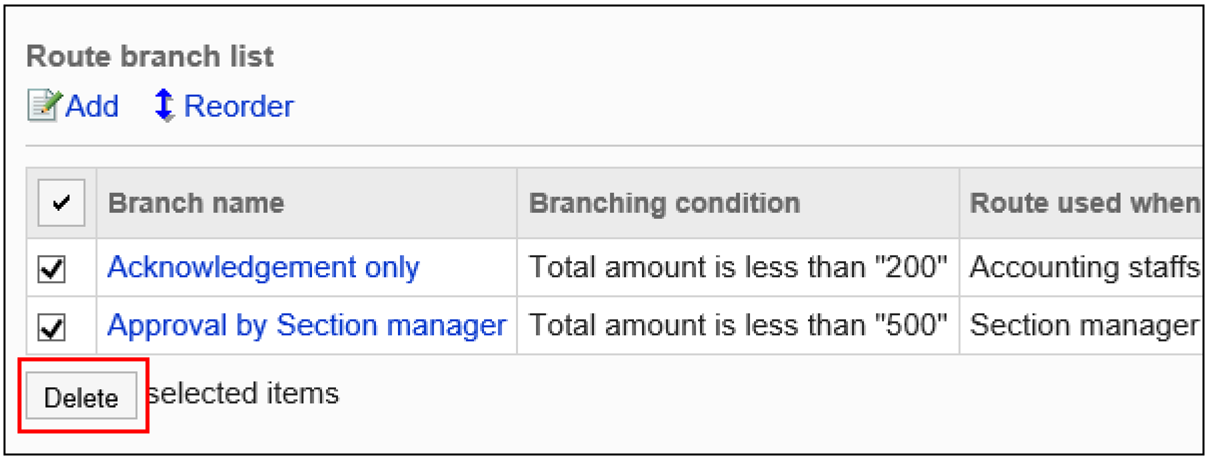
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click "Request Form" list.**

6. **On the "Request Form" list screen, select a category and click the request form name.**

7. **On the screen for request form details, select the check box for the route branching conditions to delete in the list, and then click "Delete".**



8. **Click "Yes" on the "delete all branching conditions in the request route step" screen.**

2.13.9. Managing Request Data

System administrators and operational administrators can view, route, and delete requests submitted by users.

References

- View Request data(1462Page)
- Print request data(1465Page)
- Changing Route steps(1467Page)

- Delete request data(1470Page)

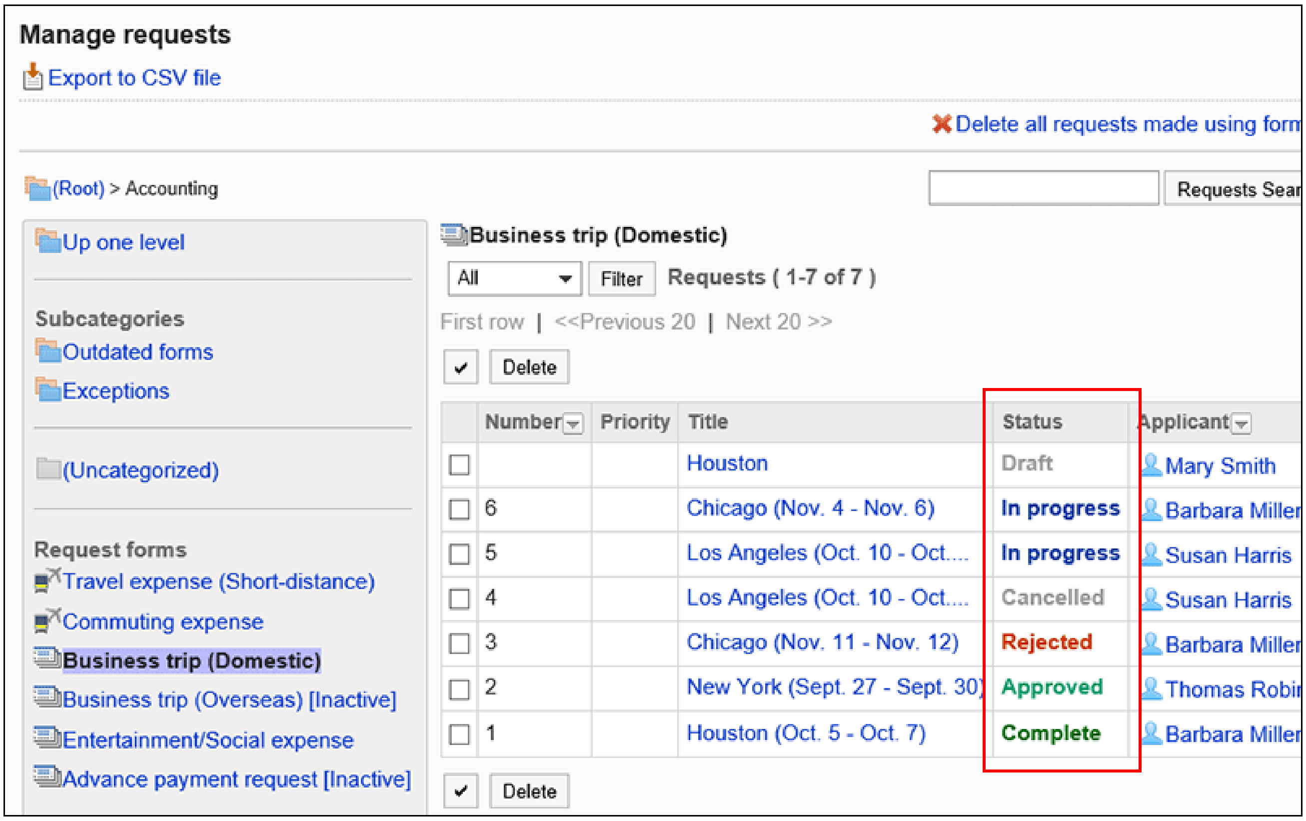
2.13.9.1. View Request Data

You can view request data created by users.

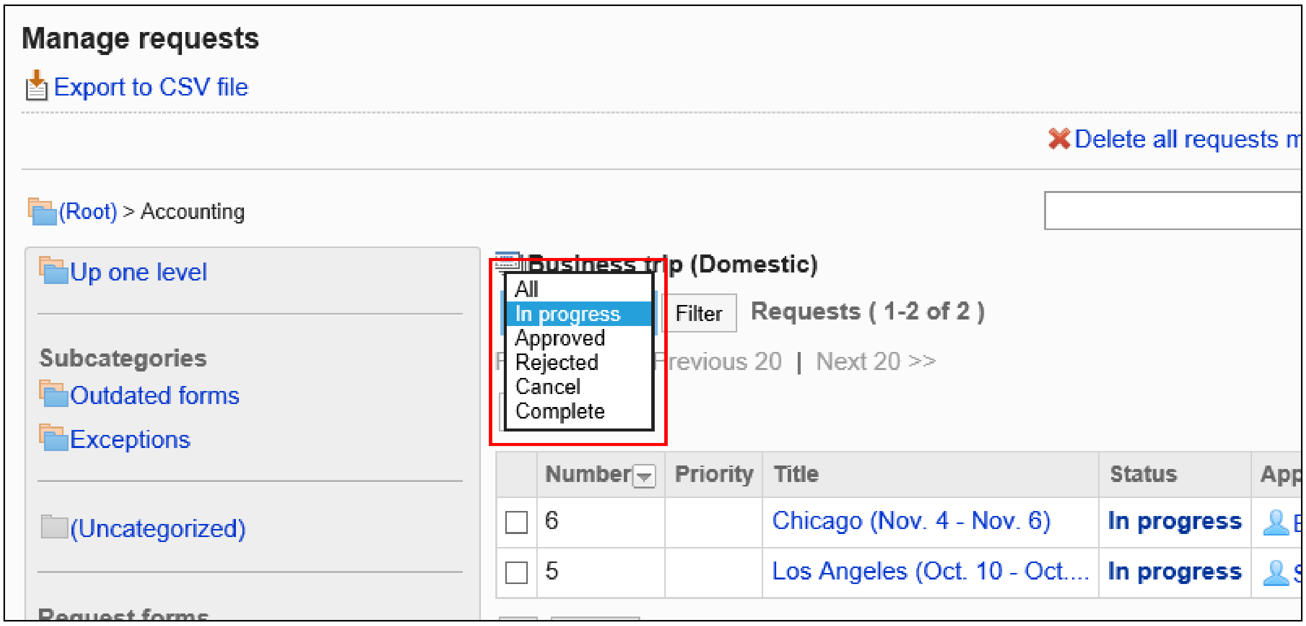
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to manage request data.**
6. **On the screen to manage request data, select a category and select request forms.**

   The request status is displayed in the list of request data using the selected request form.



If necessary, filter the target request data by using the request status.



7. Click the subject of the request data you want to view.

Status That Is Displayed in the Request Status

The "status" varies depending on the processing of the applicant or processor.

The status that is displayed in the "Status" field is as follows.

- **Draft:**

  The applicant has saved the request data as a draft.

When you submit the request data, the status changes to "in progress".

If the applicant has regained the request, the status of the request data will change from "in progress" to "draft".

When a request is deleted, the status remains "draft".

- **In progress** :

  The status until the last approver approves the request, if the request has an approval route.

  If only the acknowledgement route is set, the status remains "In progress" until the last recipient processes it.

  The status remains "In progress" if the approver send back the request.

- **In progress:**

  The status after the last approver approves the request, if the request has an approval route and an acknowledgement route.

  The status stays "Approved" until its acknowledgement route is completed.

- **Rejected:**

  The status that the approver rejected the request, if the request has an approval route.

  When a request is rejected, the processing of the request data ends and the processor of the subsequent route step will not be notified of the request data.

- **Cancel:**

  The status that the applicant has canceled the request before it is processed by the last approver, if the request has an approval route.

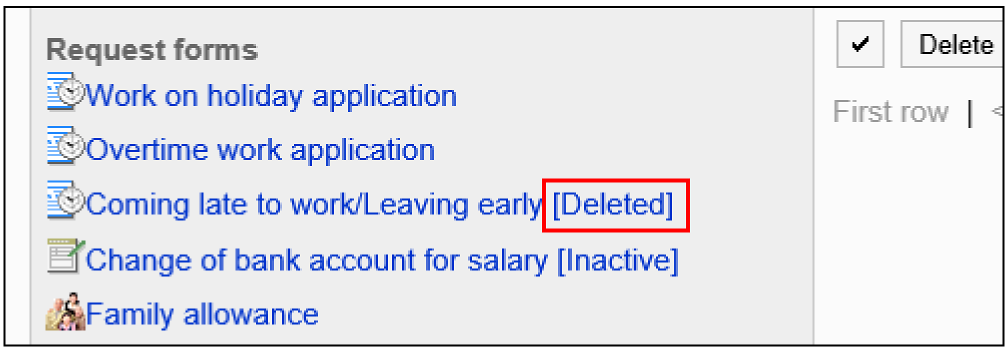
  If only the acknowledgement route is set, the status becomes "Cancel" when the request is canceled before the last acknowledger processes it.

- **Completed:**

  The status when all processes in all route steps are done and the request is completed.

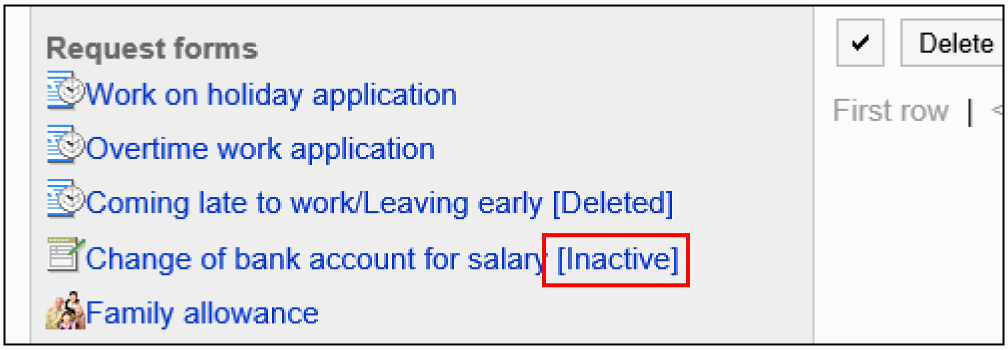
If the request form has been deleted

If a request form has been deleted and the request data exists using the request form, the request form name is displayed as "delete".



If the request form has been disabled

If the request form is invalid and has not been published to the current user, the request form name is displayed as "disabled".

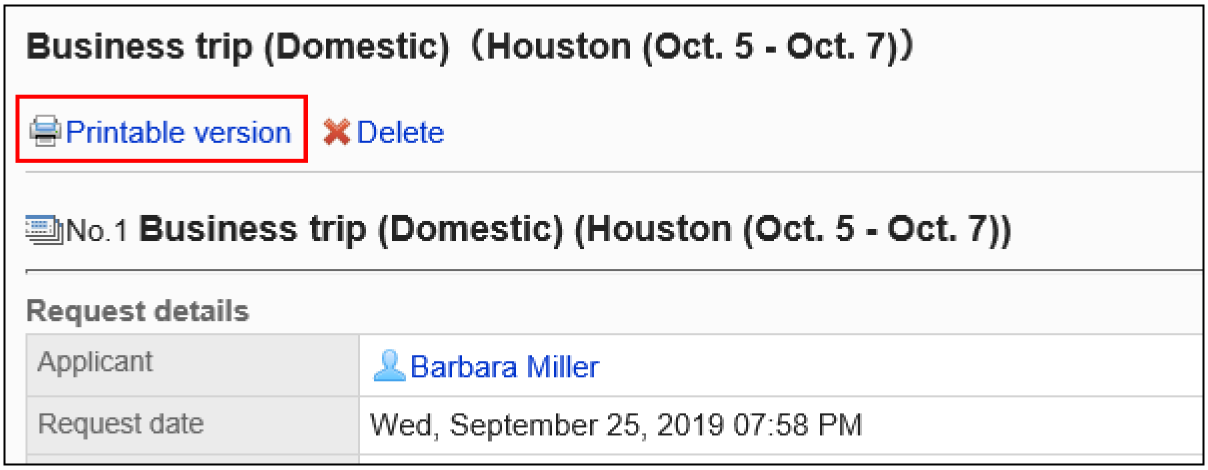


2.13.9.2. Printing Request Data

You can open the print screen and print the request data.
If a file is attached to the report, its file name will be printed. If you set to show images with body enabled in item settings, images in the view are also printed.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to manage request data.**
6. **On the screen to manage request data, select a category and select request forms.**
7. **Click the subject of the request data you want to print.**
8. **On the "Request data Details" screen, click "Print Screen".**



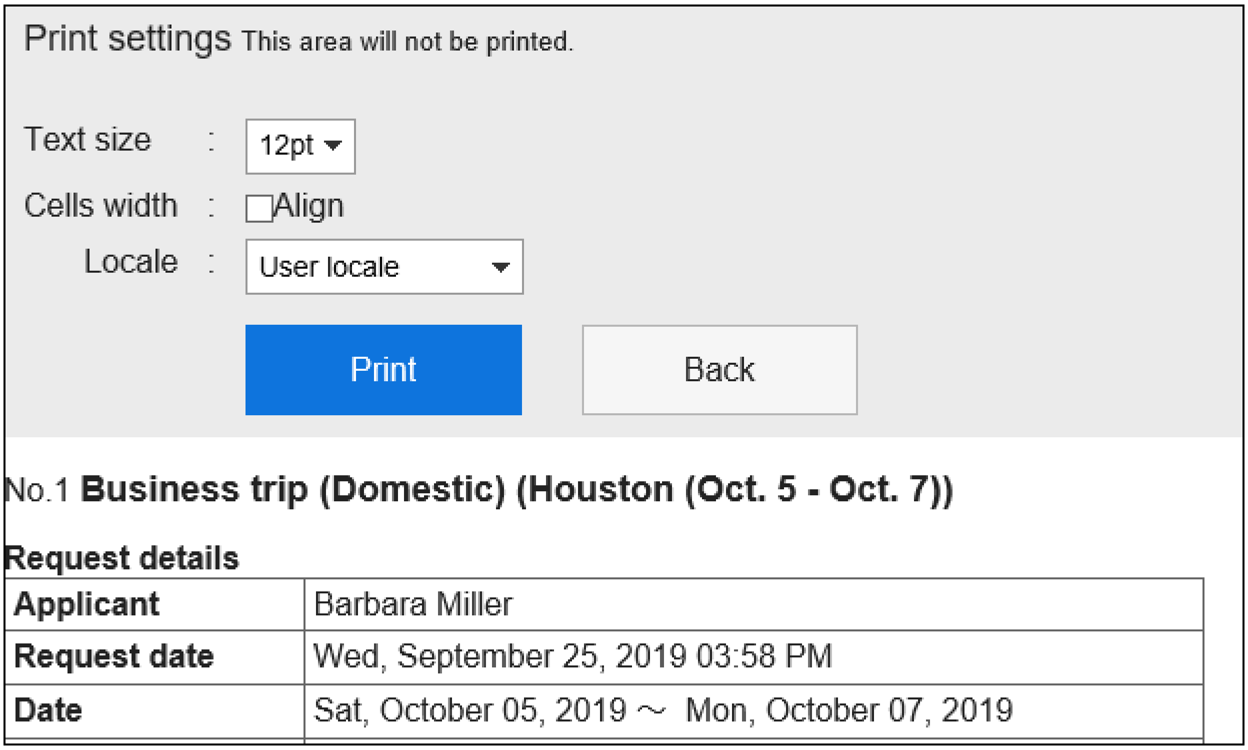
9. **On the print settings screen, set the required items and click "Print".**

- Character Size:

  Select the character size for printing from 8 pt to 20 pt.
- Width of each item:

  Select the check box to align the width of the items.
- Locale:

  Apply a language and a time zone for the selected locale.



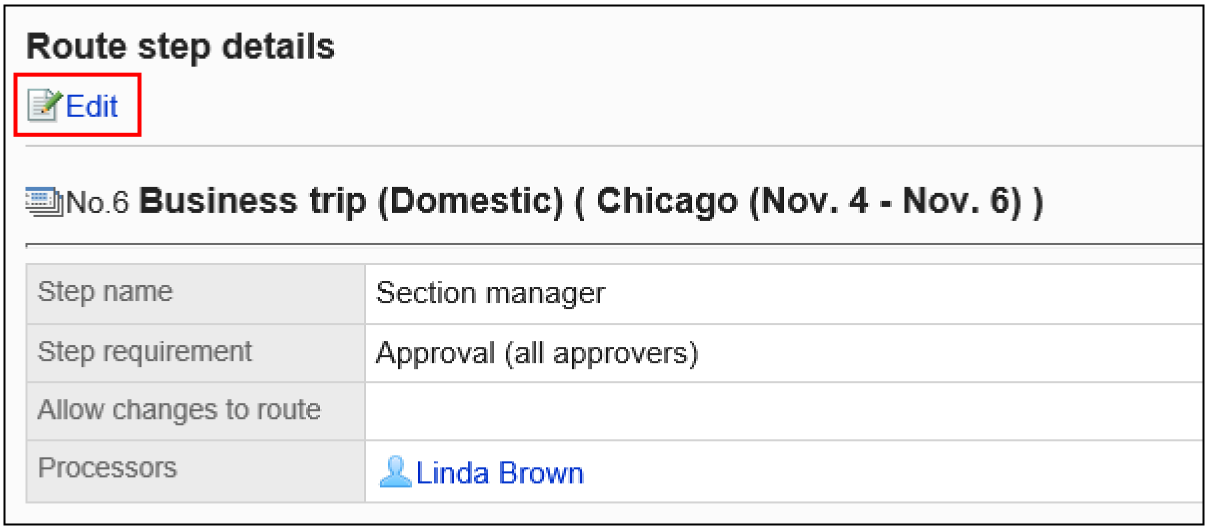
10. **Print using the print feature of the Web browser.**

2.13.9.3. Changing Route Steps

Change the processor for the route step of the request data in progress.
If you do not allow system administrators or operational administrators to change the workflow in general settings(1227Page), you cannot change the processor.

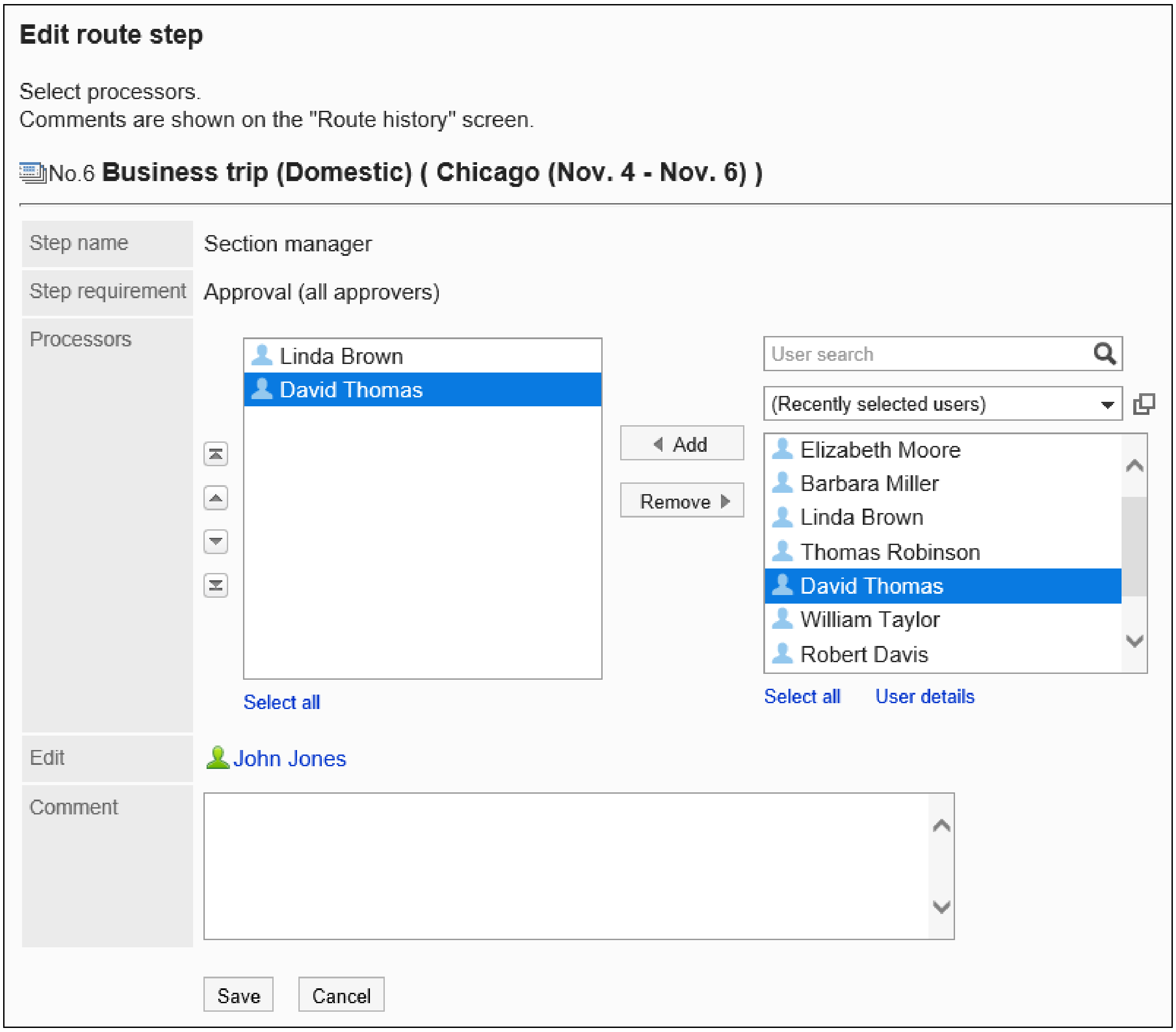
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to manage request data.**
6. **On the screen to manage request data, select a category and select request forms.**
7. **Click the subject of the request data for which you want to change the processor for the route step.**
8. **On the "Request data Details" screen, click the route step name of the route step for which you want to change the processor.**
9. **On the route step details screen, click "Save".**



10. On the "Change route step" screen, you can change the processor.

If necessary, enter the reason for changing the processor in the "Comment" field.



11. **Confirm your settings and click "Save".**

Checking the Route Change History

Users who have changed the processor for the route step can view the changes in the list.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

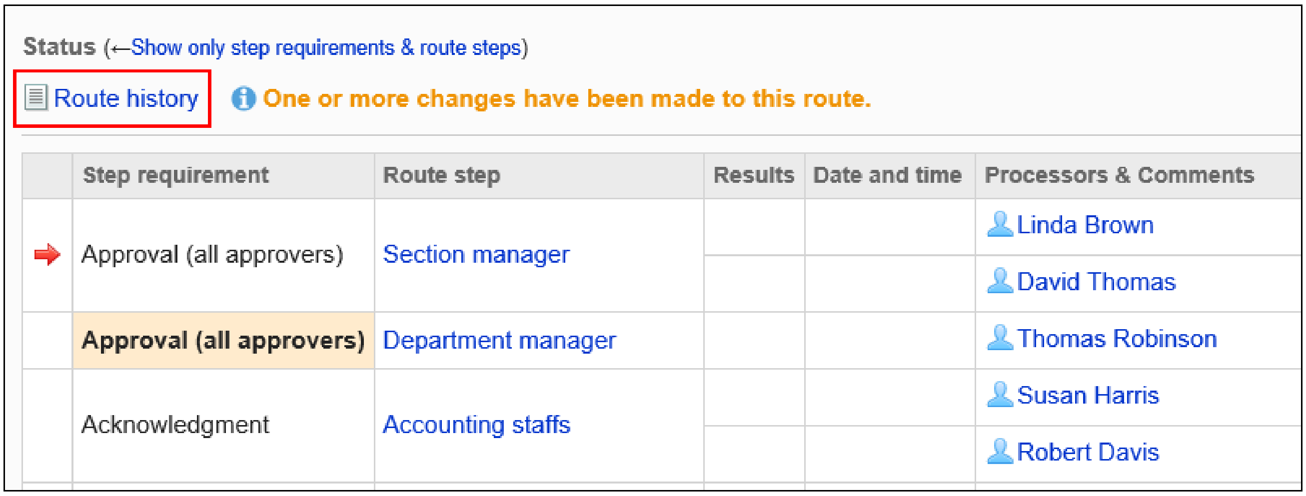
4. **Click "Workflow".**

5. **Click the item to manage request data.**

6. **On the screen to manage request data, select a category and select request forms.**

7. **Click the subject of the request data you want to check the route history.**

8. **On the "Request data Details" screen, click "Route History" in "progress".**



Status (←Show only step requirements & route steps)

Route history   One or more changes have been made to this route.

	Step requirement	Route step	Results	Date and time	Processors & Comments
	Approval (all approvers)	Section manager			Linda Brown
					David Thomas
	Approval (all approvers)	Department manager			Thomas Robinson
	Acknowledgment	Accounting staffs			Susan Harris
					Robert Davis

9. **On the "Route history" screen, check the history of the route changes.**

Route history

No.6 Business trip (Domestic) (Chicago (Nov. 4 - Nov. 6))

Edit	Route step	Step requirement	Add	Delete	Comment	Date and time
John Jones	Section manager	Approval (all approvers)	David Thomas			Thu, September 26, 2019 09:47 AM

2.13.9.4. Deleting request Data

Delete the request data.

If you delete the request data, the request data will also be deleted from the user screen.

Caution

- The deleted request data cannot be restored.

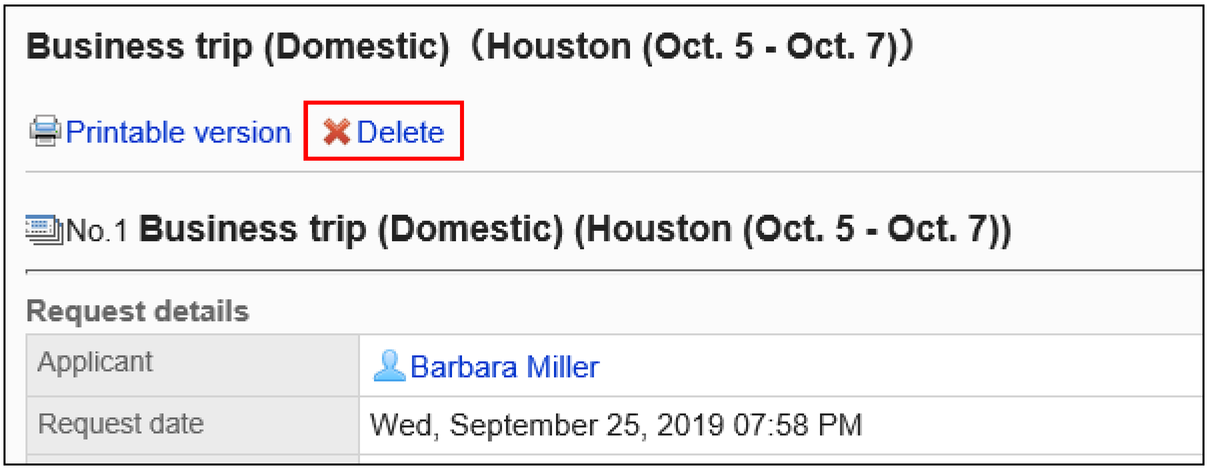
Deleting Request Data One by One

Delete the request data one at a time.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to manage request data.**
6. **On the screen to manage request data, select a category and select request forms.**
7. **Click the subject of the request data you want to delete.**

8. **On the "Request data Details" screen, click "Delete".**



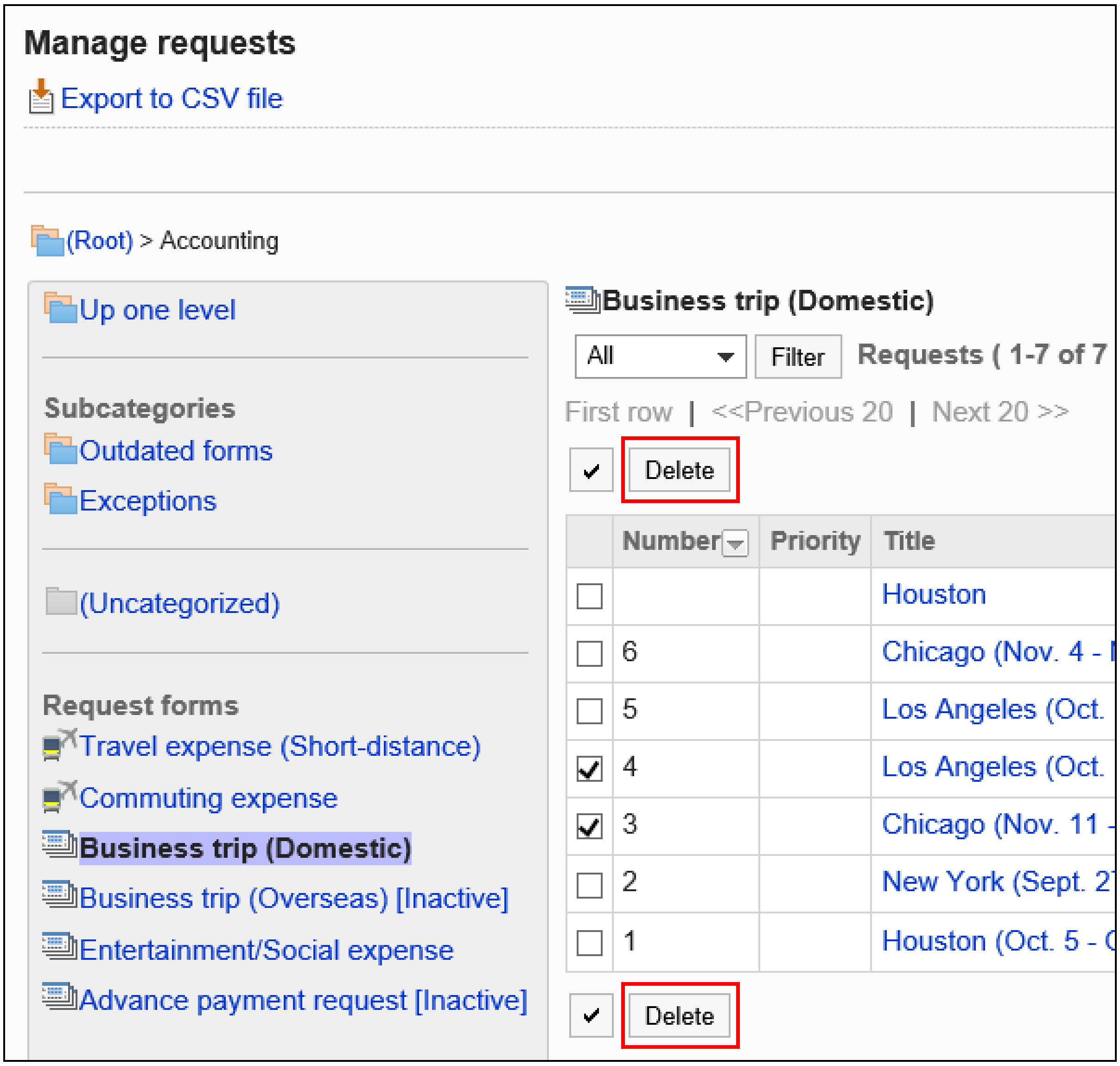
9. **Click "Yes" on the "Delete request data" screen.**

Deleting Multiple Request Data in Bulk

Select the request data you want to delete, and delete it all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the item to manage request data.**
6. **On the screen to manage request data, select a category and select request forms.**
7. **Select the check boxes of the request data to delete, and then click "Delete".**



8. **On the "Delete all requests" screen, click "Delete".**

Delete All Data from the Request Form

Delete all request data using the same request form.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

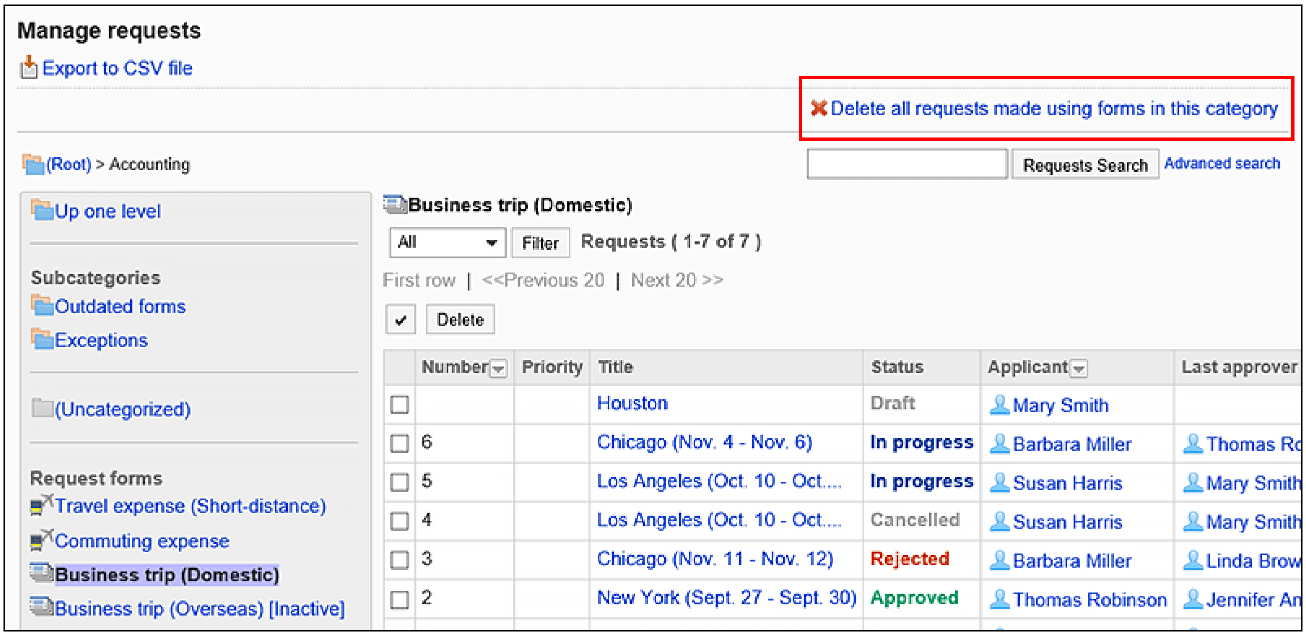
3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **Click the item to manage request data.**

6. **On the screen to manage request data, select a category and select request forms.**

7. **Click Delete all data in the request form.**



8. **On the "Delete all request Data" screen, click "Delete".**

2.13.10. Managing Data Using Files

This section describes the types of files available for managing data for request forms or requests, as well as the procedures to export and import data.

References

- Notes on Creating a CSV File(1802Page)

• CSV File Format for Workflows(1890Page)

2.13.10.1. Managing Workflows Using CSV Files

Manage workflow data using CSV files.

The following data can be managed using CSV files:

- Category
- Category names
- Access Permissions
- Operational administrative privileges:
  Configurable in Garoon version 5.9.0 or later.
- Proxy Applicant
- Proxy Approver

Importing Data from a CSV File

Import workflow data from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in Workflows(1890Page).

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Workflow".**

6. **Click "Import from CSV file".**

7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the required items for the data to import, and then click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".

10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

Export workflow data to a CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Export to CSV file".**
6. **On the "Export to CSV File" screen, select the data to export.**
7. **Set the required items for the the data to export.**

   The setting fields are as follows:

   - Character encoding:
     Select the character code that you want to use for encoding.
     The following character encoding can be selected:
     - Unicode (UTF-8)
       You can select with BOM as required.
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)
   - Include header row:
     To export an item name to the header row of a CSV file, select "Yes".
   - Language in which the data is exported
     This item is used when exporting category names.
     The category names will be exported to a CSV file in the language that you select.
     You can select multiple languages. The following languages can be selected:
     - All
     - 日本語
     - English
     - Simplified Chinese
     - Traditional Chinese
       Exported in Traditional Chinese.

8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

2.13.10.2. Managing Shared Routes Using XML Files

Manage shared routes using CSV files.

Note

- We recommend that not editing XML files and use them only for backing up or restoring data.

Importing Data from an XML File

Import shared routes from an XML file.

If the the shared route codes in existing data match the codes of data to import in same category, the imported data overwrites the existing data.

If an error occurs while attempting to import an XML file, the import is aborted. The data which has been imported will be eliminated.

Limitations

If you choose to overwrite the existing shared routes, the following limitations apply to request forms using the shared routes you overwritten:
You should set the shared routes again after importing them from an XML file.

- Branching conditions set in route branching:
  All the check boxes for route steps are selected and all the routes omitted to select are imported in the original route status.
- Item permissions:
  Access permissions for the route steps are imported to all the routes in state of view only. The user rights settings for the applicant are imported correctly.

Steps:

1. Click the administration menu icon (gear icon) in the header.

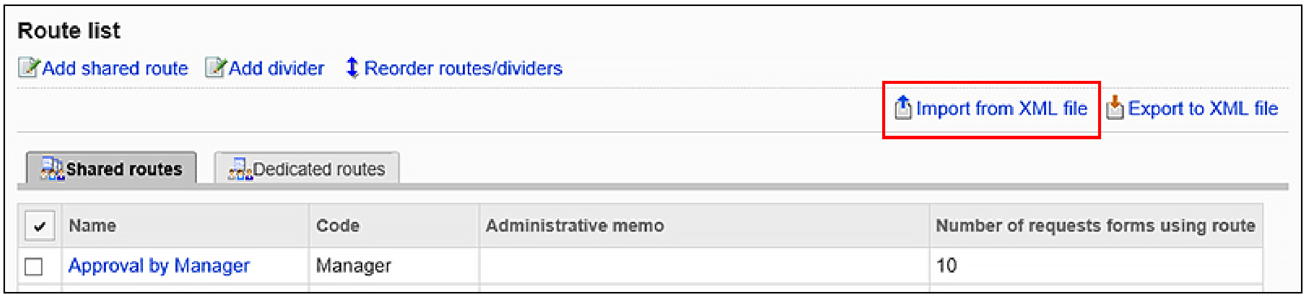
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Workflow".

5. Click the route list.

6. On the route list screen, select the shared routes tab, and then click the item to import data from an XML file.



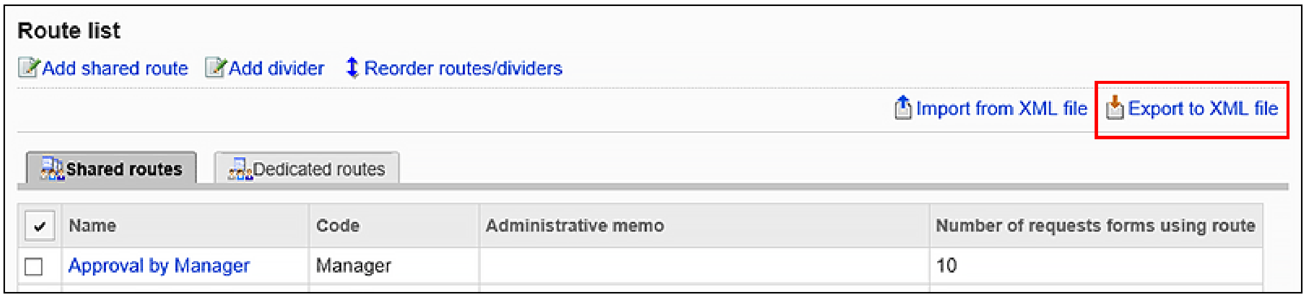
7. On the screen to import shared routes, select the file to import, and click "Import".

Exporting Data to an XML File

Export shared routes to an XML file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click the route list.**
6. **On the route list screen, select the shared routes tab, and then click the item to export data to an XML file.**



7. **On the screen to export shared routes, click "Export".**

8. Save the file with a function provided by your Web browser.

2.13.10.3. Managing Request Forms Using XML Files

Manage request forms using XML files.

Note

- We recommend that not editing XML files and use them only for backing up or restoring data.

Importing Data from an XML File

Import request forms from an XML file into categories.
If the the request form codes in existing data match the codes of data to import in same category, the imported data overwrites the existing data.
If an error occurs while attempting to import an XML file, the import is aborted. The data which has been imported will be eliminated.

Limitations

When you import request forms that use shared routes from an XML file, the following limitations applied:

- Branching conditions set in route branching:
  All the check boxes for route steps are selected and all the routes omitted to select are imported in the original route status.

Note

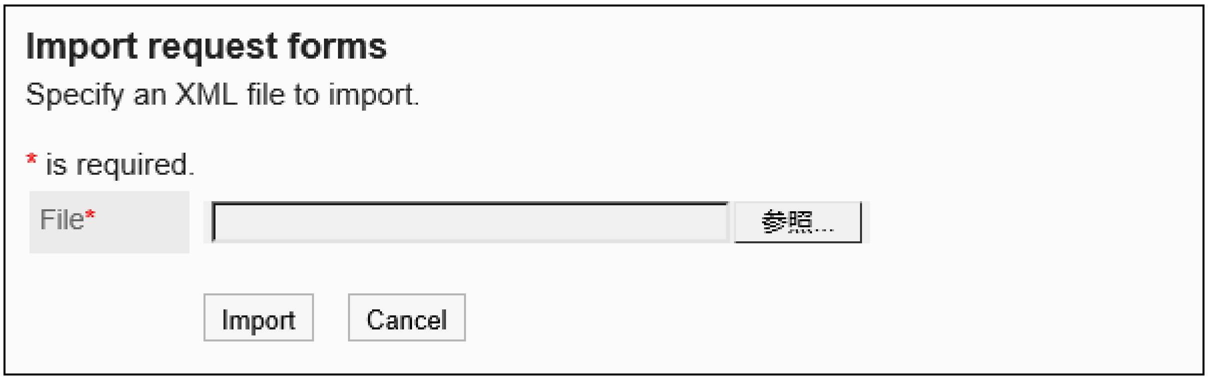
- Errors occur in the following cases:
  - The request form code of data to import matches the code in existing data in another category.
  - The shared route used in the request form data in the XML file does not exist in Garoon.
  - Both the user rights and route branching settings are set as "numeric" or "automatic calculation".

- **About Items, Items for JavaScript Customization, and Step Codes**
  - When an XML file for which a code has not been set is imported, a relevant code is set for the blank field.
  - Up to 100 characters can be imported in a code. If a code contains 101 characters or more, the first 100 characters are imported.
  - When a code is duplicated in an XML file, an error occurs.
  - If characters other than single-byte alphanumeric characters, hyphens (-), and underscores (_) are set in the code, an error occurs.

Steps:

1. **Create an XML file to import data.**
2. **Click the administration menu icon (gear icon) in the header.**
3. **Click "System settings".**
4. **Select "Application settings" tab.**
5. **Click "Workflow".**
6. **Click "Request Form" list.**
7. **On the "Request Form" list screen, select a category, and then click to import from a XML file.**

8. **On the screen to import request forms, select the file to import, and click "Import".**



Exporting Data to an XML File

Export request forms in the category to an XML file.

All request forms in the category are exported in one file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "Request Form" list.**
6. **On the screen for request form list, select a category, and then click to export to a XML file.**

7. **On the screen to export request forms, click "Export".**

8. Save the file with a function provided by your Web browser.

2.13.10.4. Exporting Request Data to a CSV File

You can export request data to a CSV file per form. The CSV file can be used as backup data.
It cannot be imported from a CSV file.

Note

- When you select "route" for an item to export, and then export item names to the first row, only the first one of processors in the first route step will be exported as "Route 1" item name. The item names for other route steps or processors will not be exported.

Steps:

1. Click the administration menu icon (gear icon) in the header.

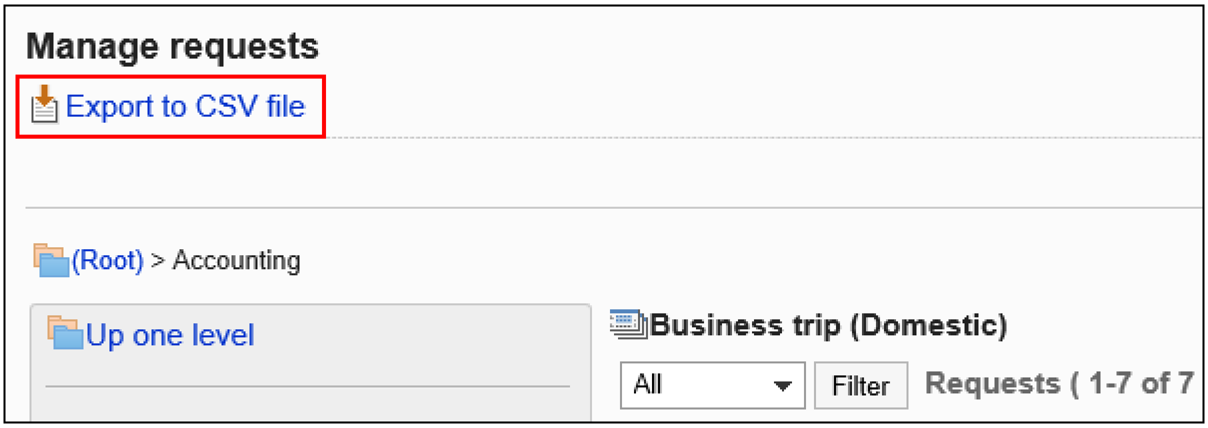
2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Workflow".

5. Click the item to manage request data.

6. On the screen to manage request data, select a category, then select a request form, and click "Export to CSV file".



7. On the screen to export request data, set the required items for the exported data.

The setting fields are as follows:

- Number:

  Enter the request number to filter by it.
- Subject:

  Enter the subject to filter by it.
- Applicant:

  Enter the applicant to filter by it.
- Status:

  Clear the check boxes for the statuses as needed to filter by them.
- Requested (time range of date applied):

  Filter by date or or period that requests applied.
- Items:

  Select items from request forms to export to a CSV file.

  Select the items to export from the available item list, and click "Add".

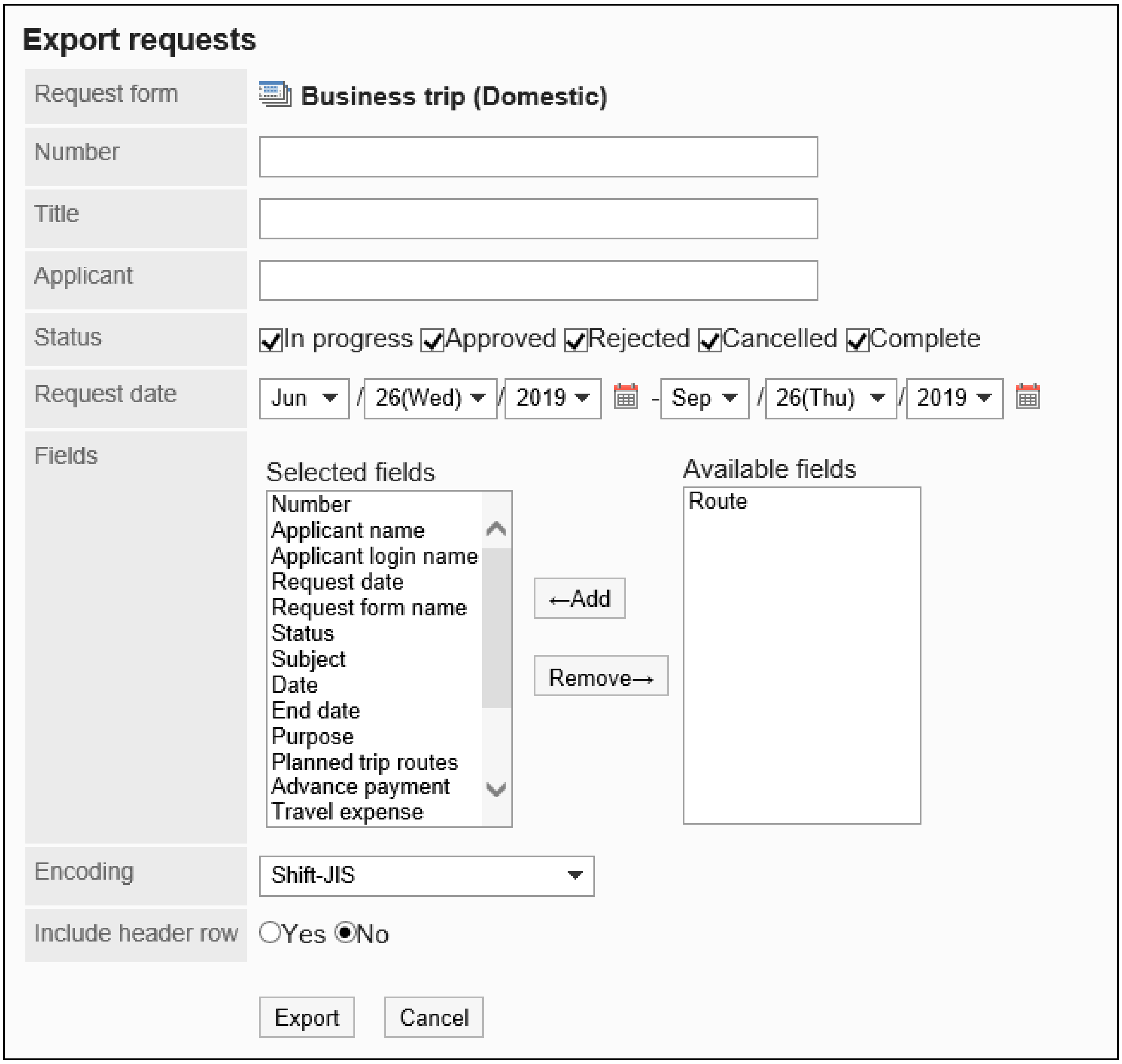
  To delete items, select the item to delete from the export item list, and then click "Delete".
- Character encoding:

  Select the character code that you want to use for encoding.

  The following character encoding can be selected:
  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".



8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

2.13.10.5. Automatically Exporting Request Data to a CSV File

If you set the automatic export of request data, the request data got final approval is automatically exported to a CSV file.

This example assumes that Garoon is installed in the following environment:

- Installation identifier: cbgrn
- Web server CGI directory
  - On Windows: C:\Program Files\cybozu
  - On Linux: /usr/local/cybozu/

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Workflow".**

5. **In "General Settings", set the character encoding for automatic export.**

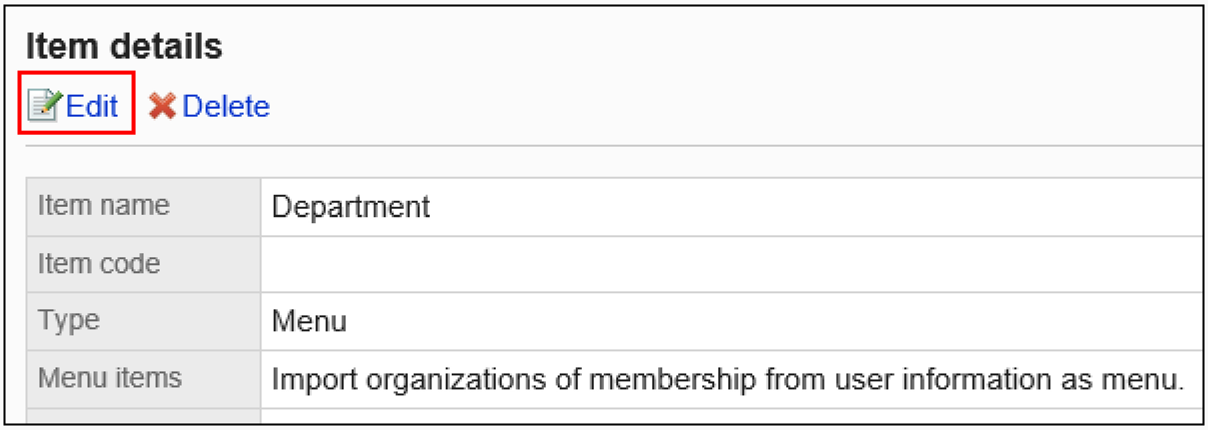
   For details, see Setting Character Encoding for Automatic Export(1235Page).

6. **Click "Request Form" list.**

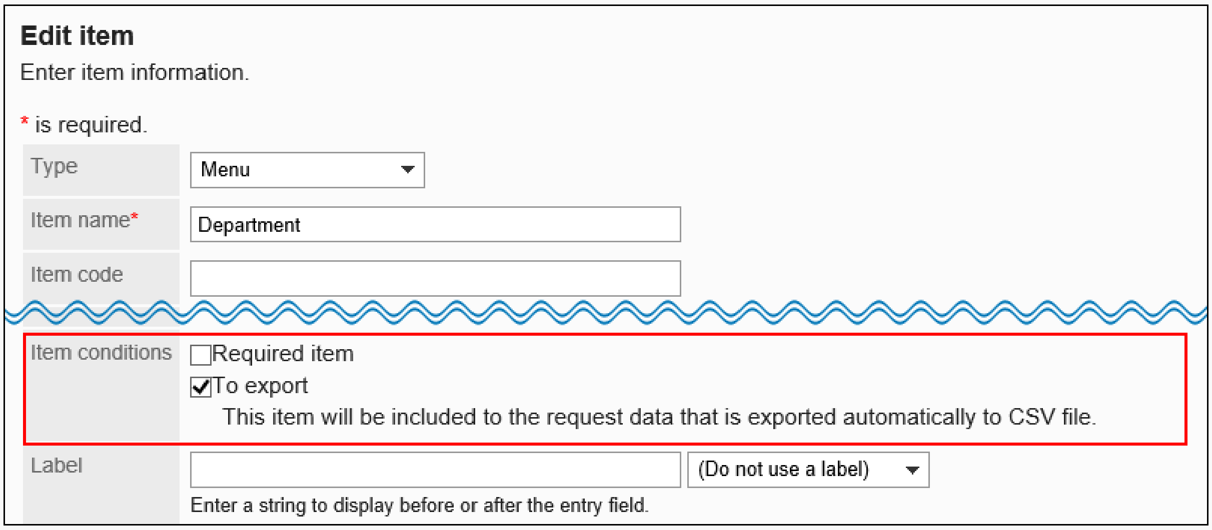
7. **On the "Request Form" list screen, select a category, and then click the request form name of the request form to set up automatic export of request data.**

8. **Sets items to export to a CSV file.**

   1. On the screen for request form details, click the item name of the item to export in the request form list.
   2. On the item details screen, click "Save".

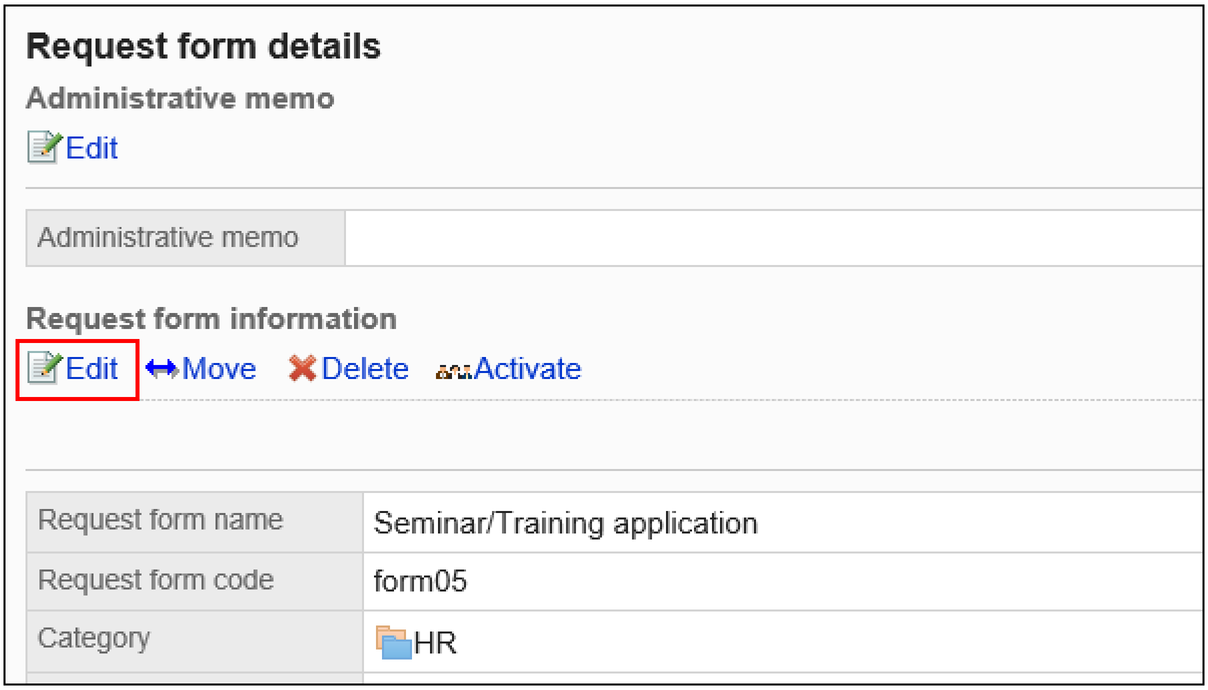


3. On the screen to change items, select the check box to set as exported items in the field for item conditions.



4. Confirm your settings and click "Save".

9. On the screen for request form details, click "Save" in the request form information.



10. In the field to change request forms on the screen to export request data automatically, select the check boxes for exporting automatically, and set the following items:

- Export the name of the applicant:
  Select whether to export the applicant's login name to the CSV file.

- Include header row:

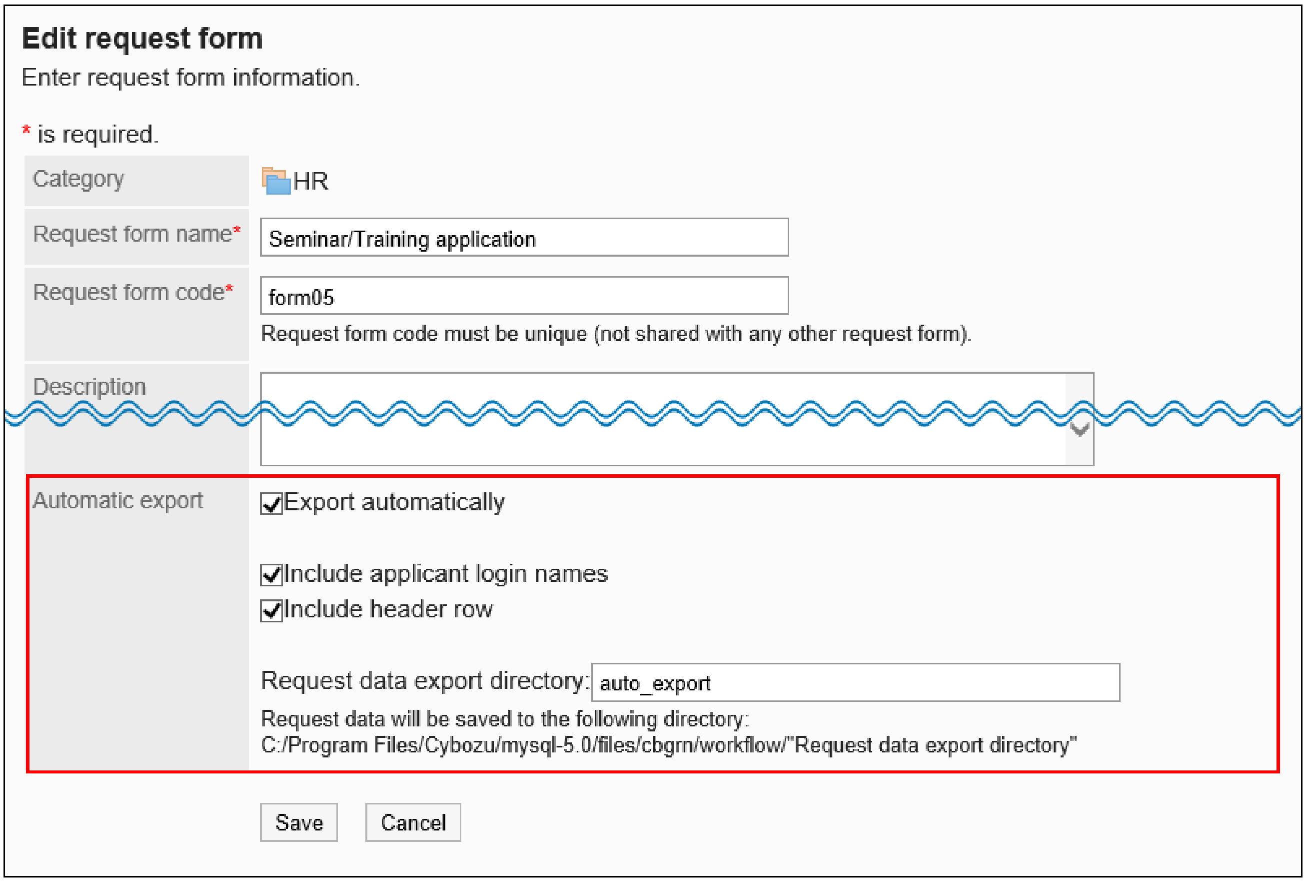
  Set whether to export the item names to the first row of the CSV file.
- Directory name for exporting request data:

  You can use single-byte alphanumeric characters, "-" (hyphen), and "_" (underscores) for directory names.

  For example, if the directory name is "auto_export", the CSV file will be stored as follows:
  - On Windows:

    C:\Program Files\cybozu\mysql-5.0\files\cbgrn\workflow\auto_export\
  - On Linux:

    /usr/local/cybozu/auto_export/



11. Confirm your settings and click "Save".

Note

- An internal ID is set automatically to the file name of the CSV file. System administrators cannot set the file names.

2.14. MultiReport

MultiReport is an application that shares reports required for work such as meeting minutes and reports.
System administrators and application administrators can manage report forms and set user rights.

References

- General Settings for MultiReport(1489Page)
- Setting categories(1492Page)
- Setting Access Permissions for Categories(1502Page)
- Setting up Report Forms(1513Page)
- Setting up Items in Report Forms(1533Page)
- Enabling Report Forms(1531Page)

2.14.1. General Settings for MultiReport

In MultiReport settings, you can set basic functions for multireports, such as functions available in report comments and default watchers.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

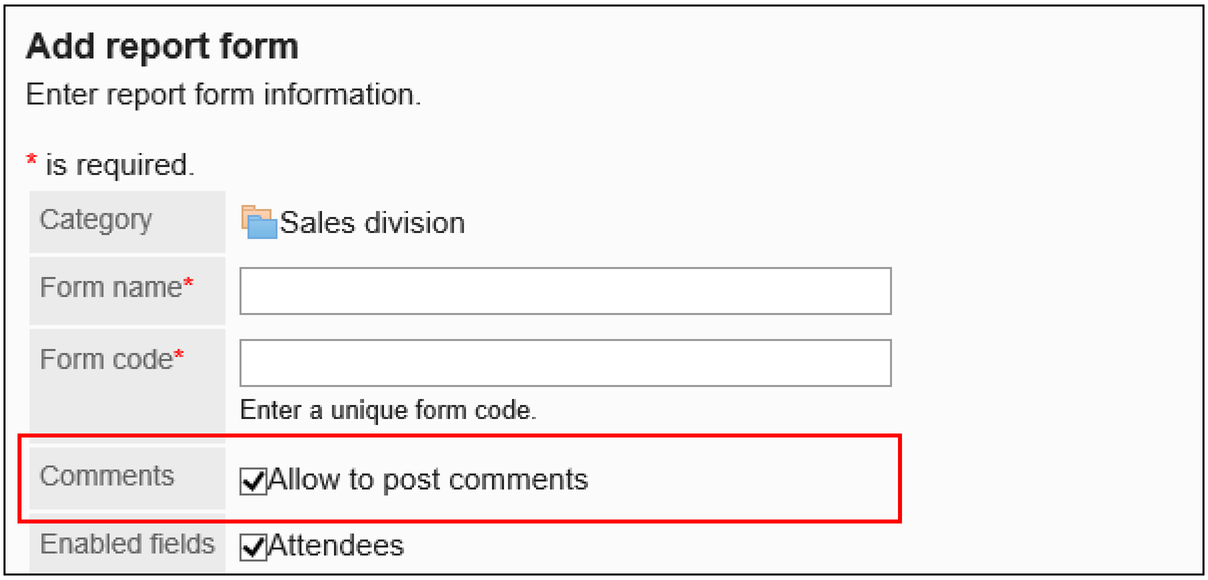
4. **Click "MultiReport".**

5. **Click "General Settings".**

6. **On "General settings" screen, set the initial status of comment permission field.**

A field to set the default value of the "Comment" field on the screen to add report forms.

You can set whether to allow users to add comments to reports when you create report forms.



7. **Set the permission to use Rich Text Formatting feature.**

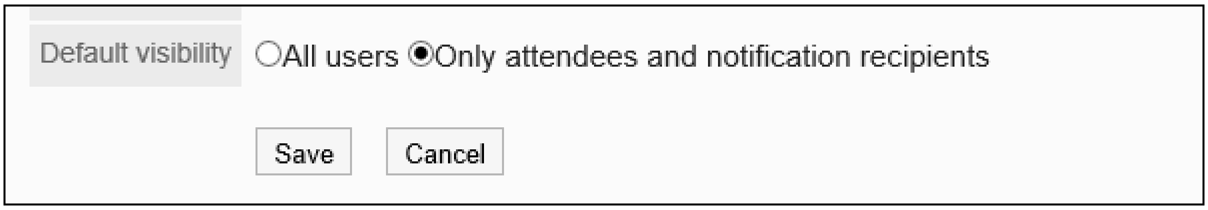
Select whether to allow using Rich Text Formatting in items and comments in report forms.

For details, refer to Working with Text Formatting.

8. **Set "Allow the use of anchor links in comments" field.**

Set whether to allow users to use the anchor feature in comments.

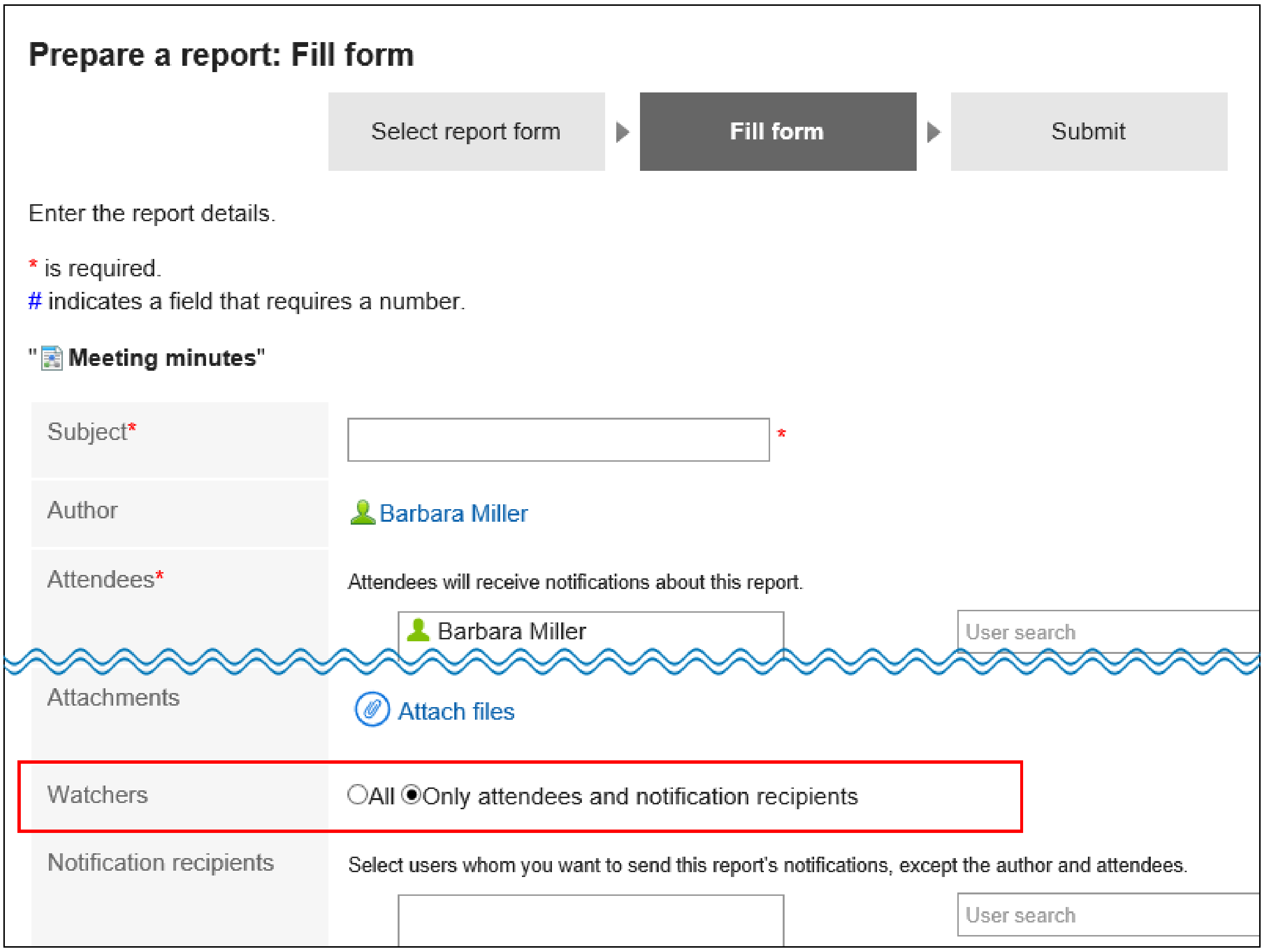
9. **Set the "Default visibility" field.**



A field to set the default value to one of the followings for "Watchers" field on the create reports page:

- All users
- Only attendees and notification recipients

You can set the watchers for reports when you create reports.



10. Confirm your settings and click "Save".

2.14.2. Managing Categories

This section describes how to set up categories to categorize report forms.

User rights and operational administrators can be set for each category.

References

- Adding Categories(1493Page)
- Setting Access Permissions for Categories(1502Page)
- Setting Operational Administrative Privileges for Categories(1508Page)

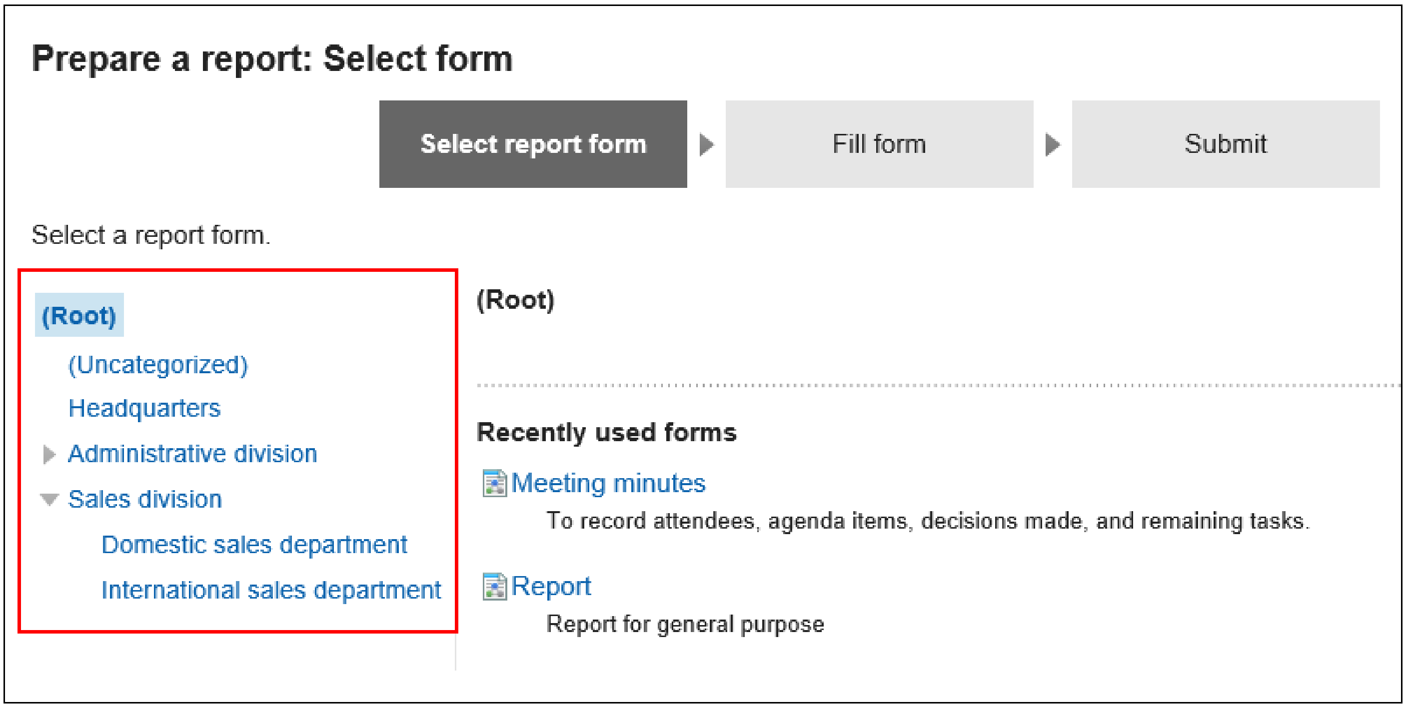
2.14.2.1. Setting Categories

Set categories to categorize report forms.

The following categories are preset in advance: They cannot be changed, moved, and deleted.

- (Root):
  "(Root)" is the top-level category that categories created by system administrators are under it.
- (Uncategorized):
  The category contains report forms not categorized in any categories system administrators created.

Categories are displayed on the screen to create reports (select report forms) of users.



Adding Categories

Add categories. Categories can be layered.

You cannot add categories under "(Uncategorized)".

Note

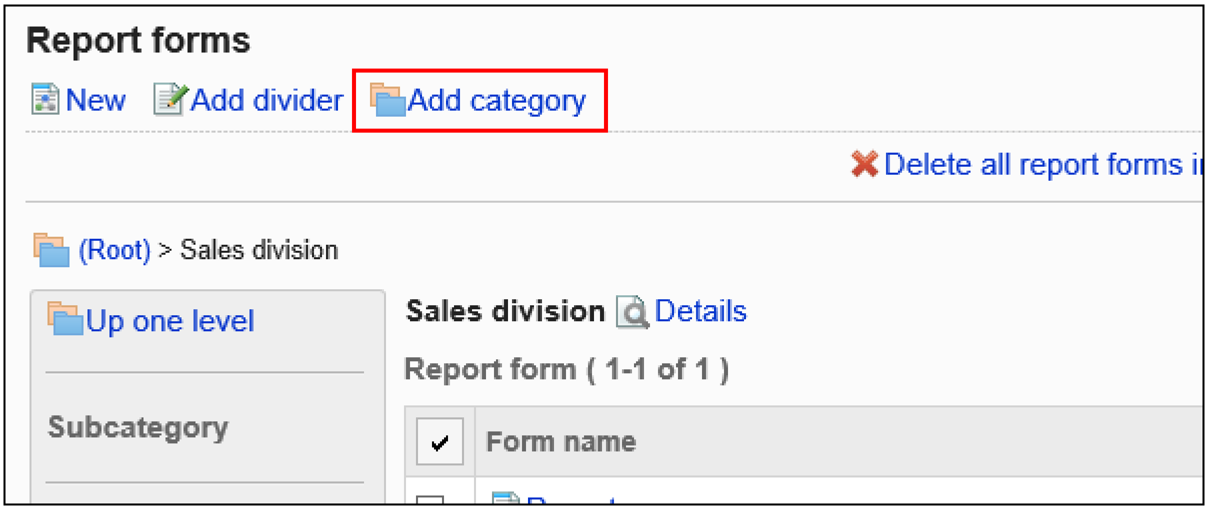
- When you add subcategories, the permissions of the parent category are not applied to them. Permissions must be set for each category.
  For details, refer to Setting Access Permissions for Categories(1502Page).

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**

6. On the screen for report form list, click to add categories.

To add subcategories, select the parent category, and then click to add categories.



7. On the "Add Categories" screen, enter the category name in "Subject" field.

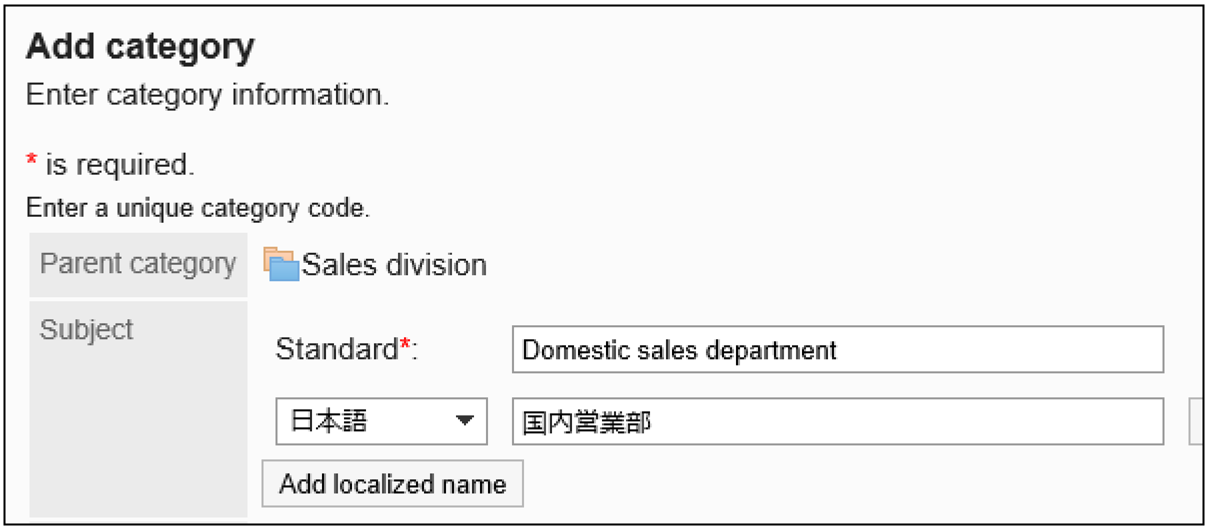
You should set category names.

Clicking "Add localized name" allows you to set category names in multiple languages.

If you do not set the category name in the user preference language, the default category name is displayed.

The following languages can be set:

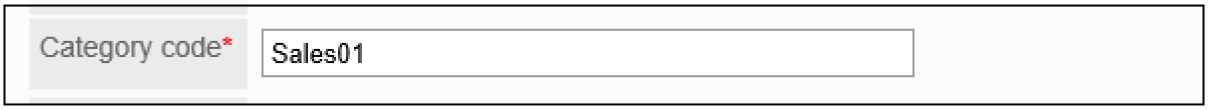
- 日本語
- English
- Simplified Chinese
- Traditional Chinese
  Displayed in Traditional Chinese.



8. Enter the category code field.

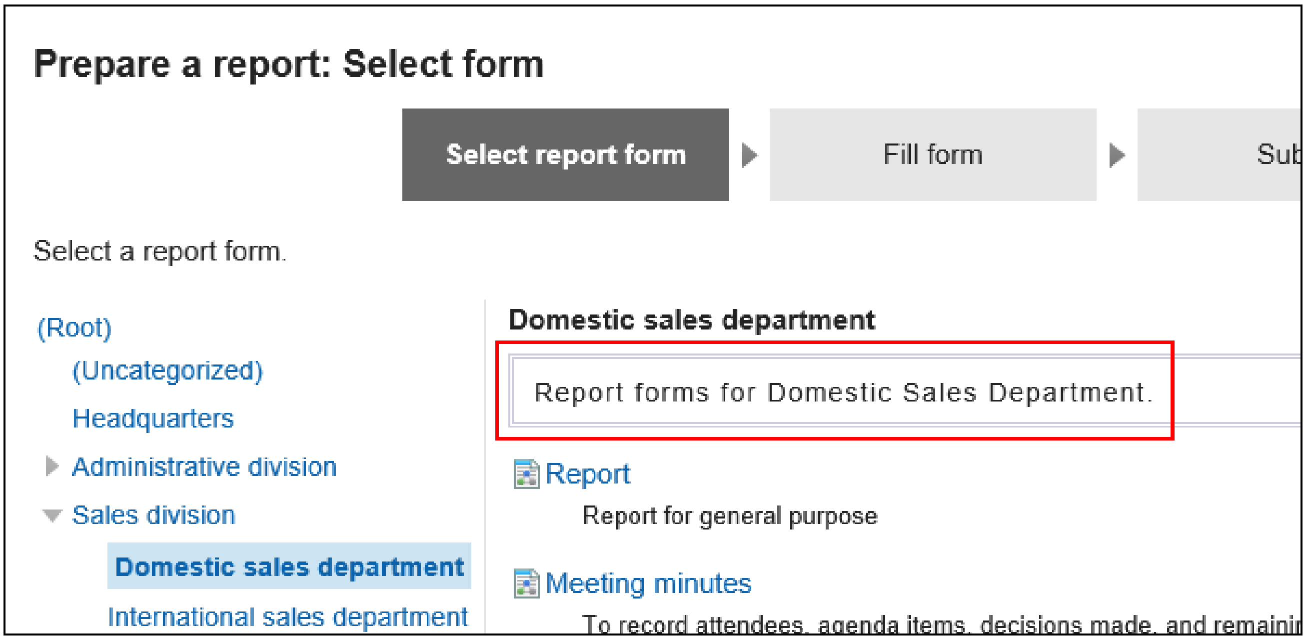
You should set the category code.

This is a unique code for identifying categories.



9. **Optionally, enter a description of the category in the Notes field.**

The details entered are displayed on the user screens.



10. **Confirm your settings and click "Add".**

Changing Categories

Change the settings of a category.

You cannot change the settings for "(Root)" and "(Uncategorized)".

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

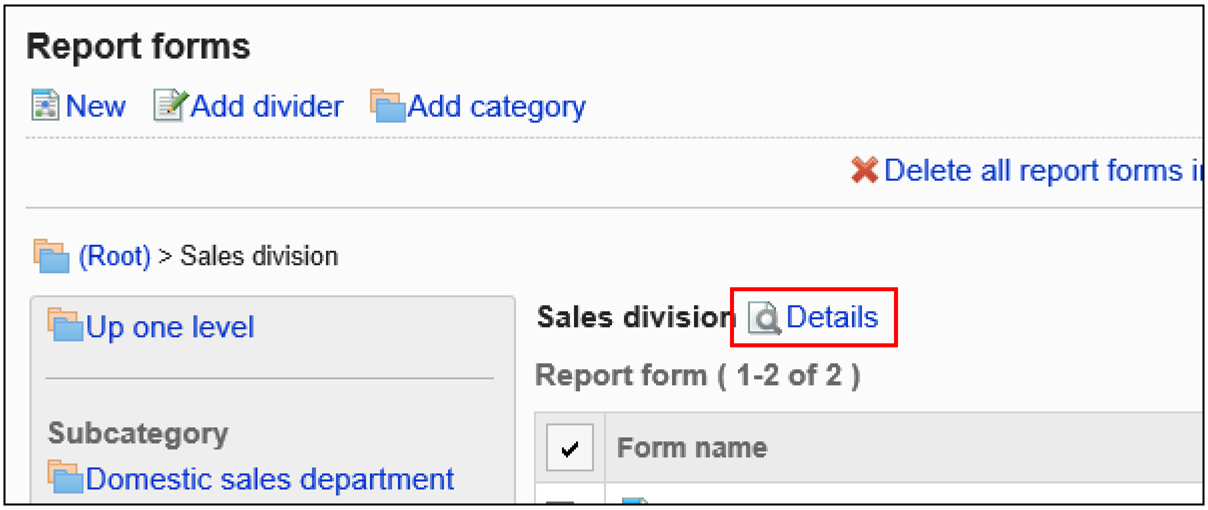
2. **Click "System settings".**

3. **Select "Application settings" tab.**

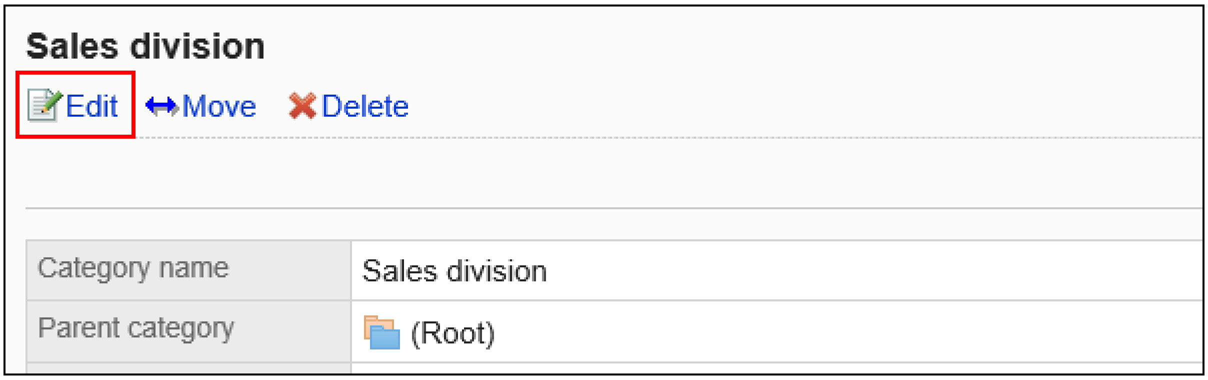
4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click "Details".**



7. **On the screen for category details, click "Save".**



8. **On the screen to change categories, set the necessary items.**

9. **Confirm your settings and click "Save".**

Moving Categories

Move categories.

When you move categories, report forms and its subcategories in the category are also moved.

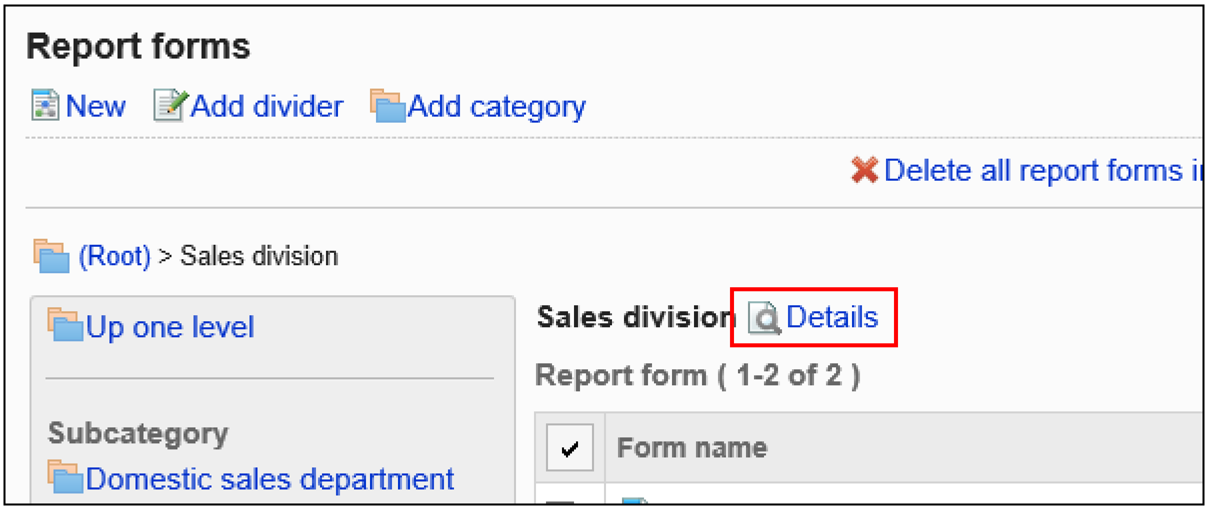
"(Root)" and "(Uncategorized)" cannot be moved.

Note

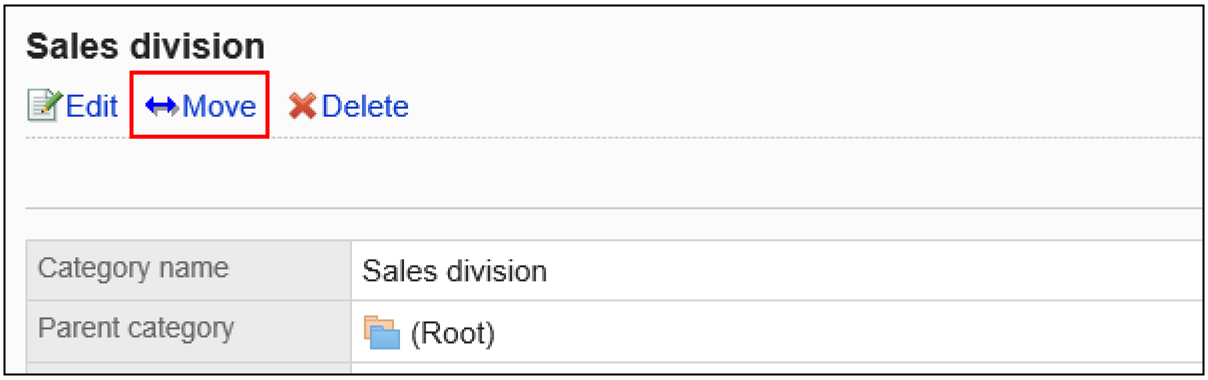
- If the destination parent category has user rights set for it, the report forms in the category may not be available to users depending on their user rights. Check the user rights of the destination parent category before moving categories.
  For details, refer to Setting Access Permissions for Categories(1502Page).

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select the category to move, and then click "Details".**



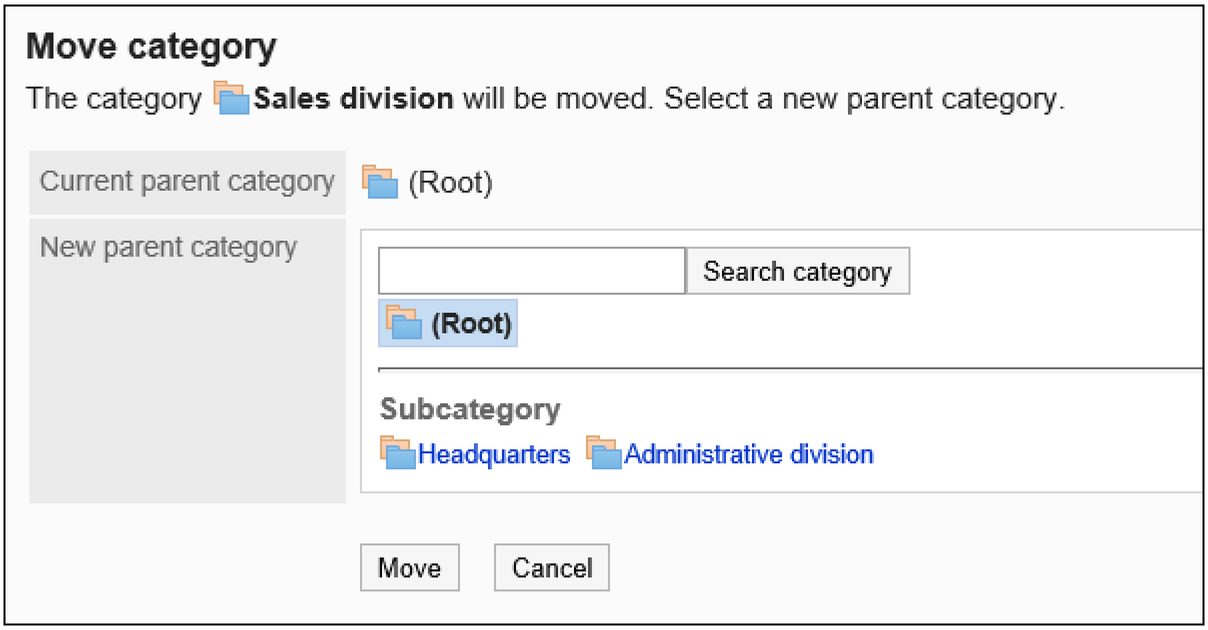
7. **On the screen for category details, click "Move".**



8. On the screen to move categories, select the parent category to move to.

You can search for categories to move categories into by entering keywords and clicking "Category search".

Clicking a category name moves to the category.



9. Confirm your settings and click "Move".

Reordering Subcategories

Reorder subcategories.

You cannot change the orders for "(Root)" and "(Uncategorized)".

Steps:

1. Click the Administration menu icon (gear icon) in the header.

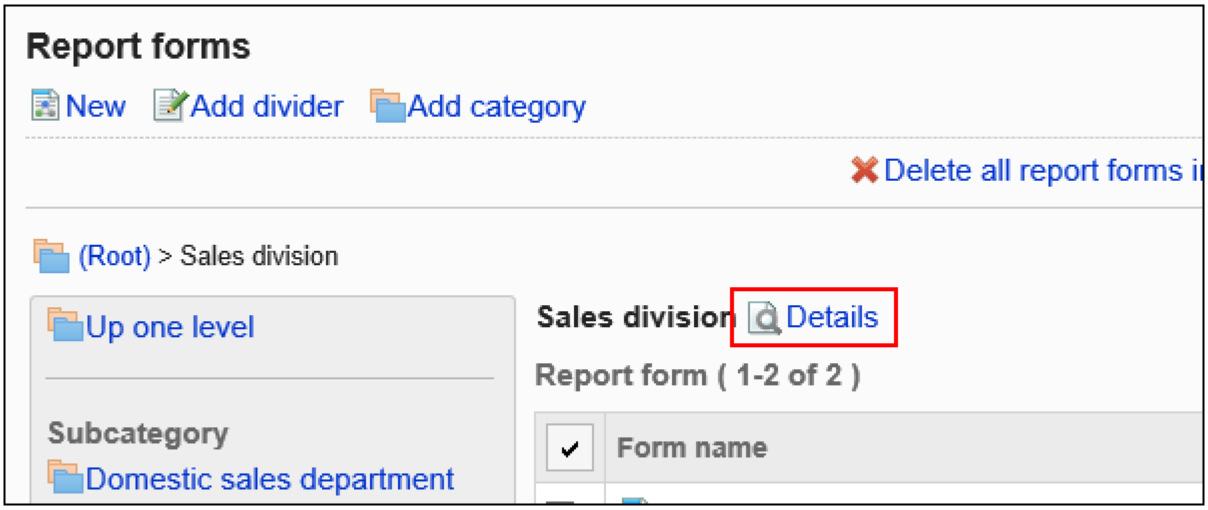
2. Click "System settings".

3. **Select "Application settings" tab.**

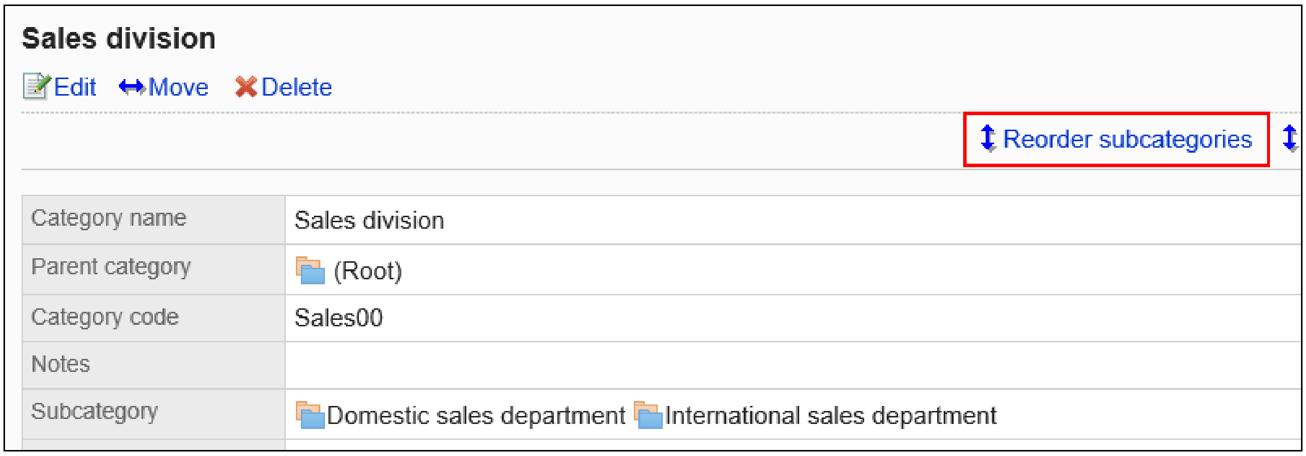
4. **Click "MultiReport".**

5. **Click the report form list.**

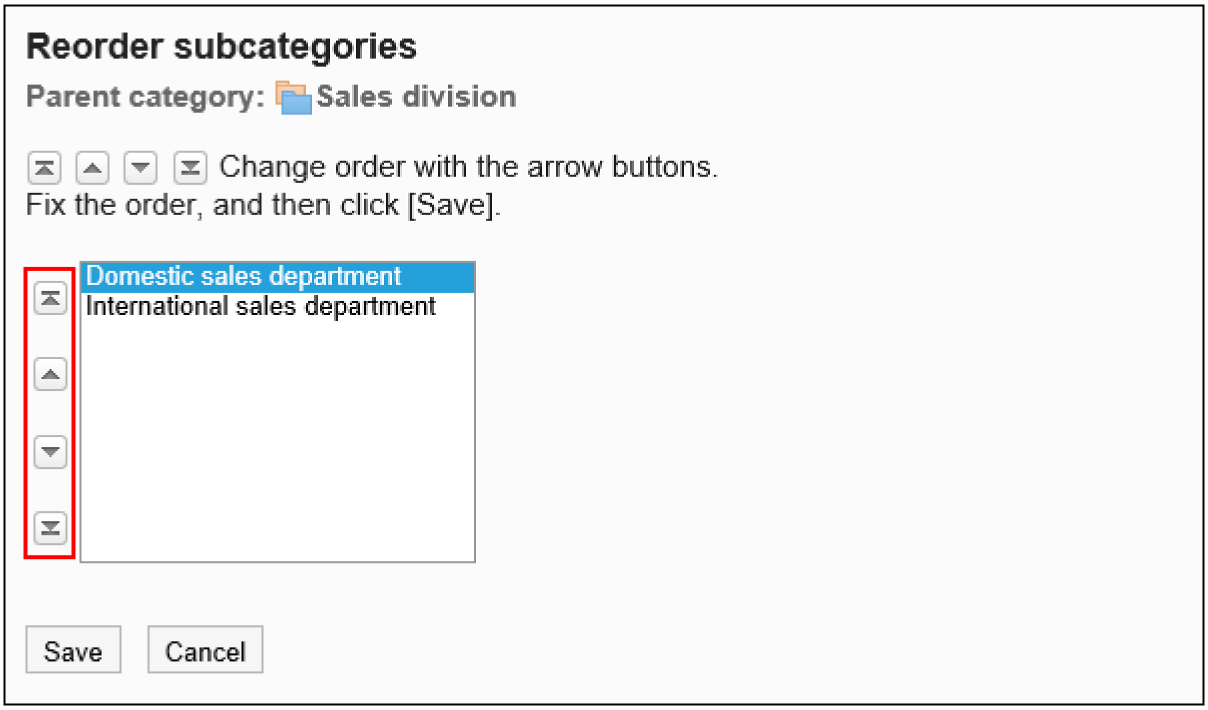
6. **On the screen for report form list, select the category to reorder subcategories, and then click "Details".**



7. **On the screen for category details, click the item to reorder subcategories.**



8. **On the screen to reorder subcategories, you can change the order of subcategories.**



9. Confirm your settings and click "Save".

Deleting Categories

Delete categories.

Deleting categories deletes subcategories in them. Report forms in the deleted categories and subcategories are moved to "(Uncategorized)".

You cannot delete "(root)" and "(Uncategorized)".

Caution

- Deleted categories cannot be restored.

Note

- If you have more than 15 levels of subcategories, you cannot delete their parent category.
- Operational administrators cannot delete categories to which they do not have operational administrative privileges.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

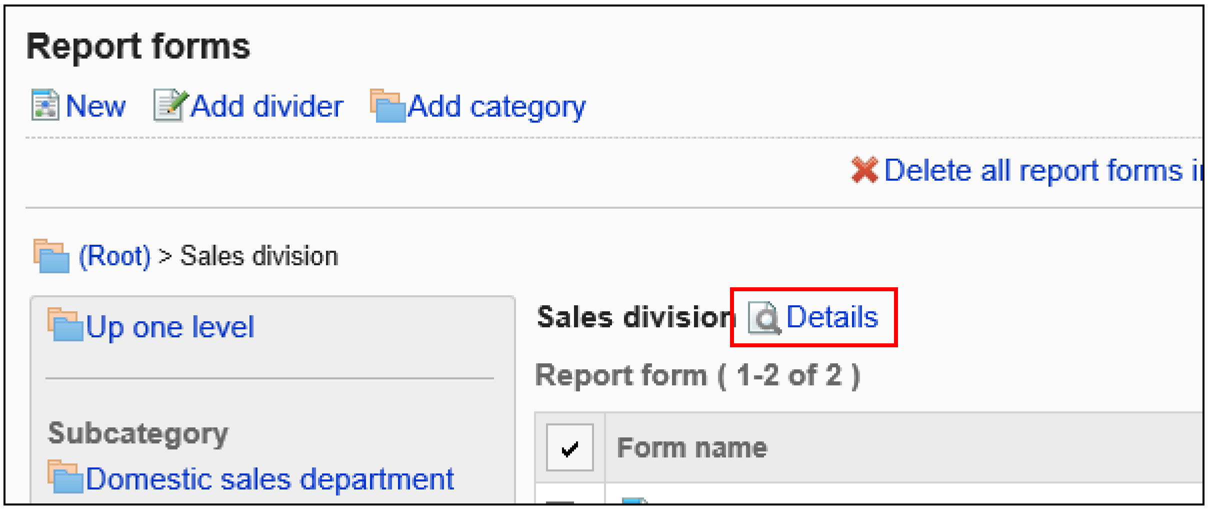
2. **Click "System settings".**

3. **Select "Application settings" tab.**

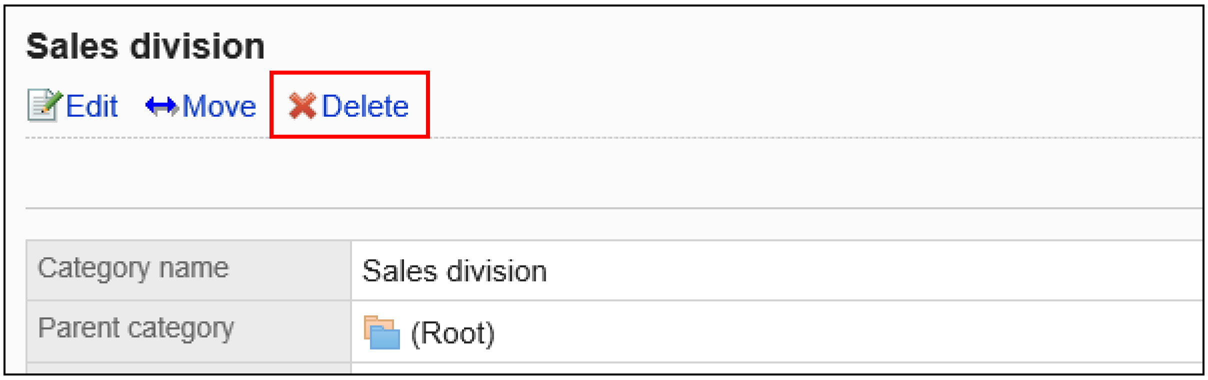
4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click "Details".**



7. **On the screen for category details, click "Delete".**



8. **Click "Yes" on the page to delete categories.**

2.14.2.2. Setting Access Permissions for Categories

For categories, set the following permissions for departments, users, or roles.

- Access permissions

You cannot set privileges to "(Uncategorized)".

The permissions for multireports vary by the security model applied to the portlet.
The default setting is set to "REVOKE (All users have access except users on list)". All users are allowed to do the following:

- Use report forms in categories
- Use filters to categories
- View reports created using report forms in categories

For information on permissions, refer to User Rights(46Page) and Prioritized Access Permissions(51Page).

Setting User Rights

Set access permissions for each category.
The example shows how to set access permissions in case when the security model is "GRANT (Only users on list have access)".

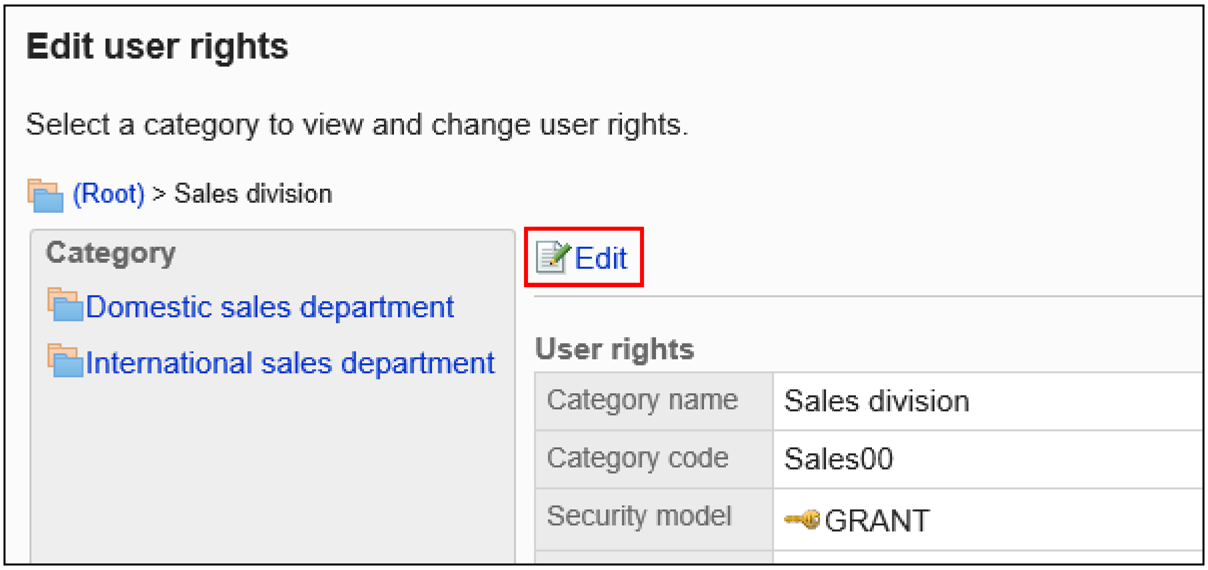
Caution

- If you change your security model, configured permissions before changing are initialized.

Steps:

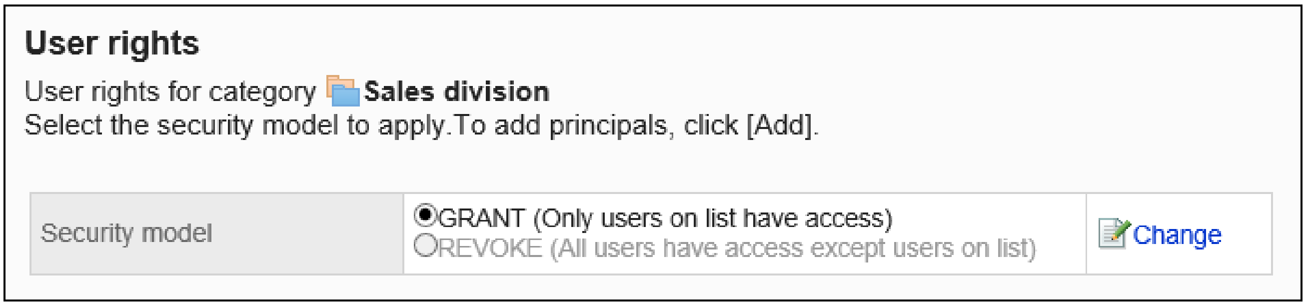
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a category and click "Edit".**

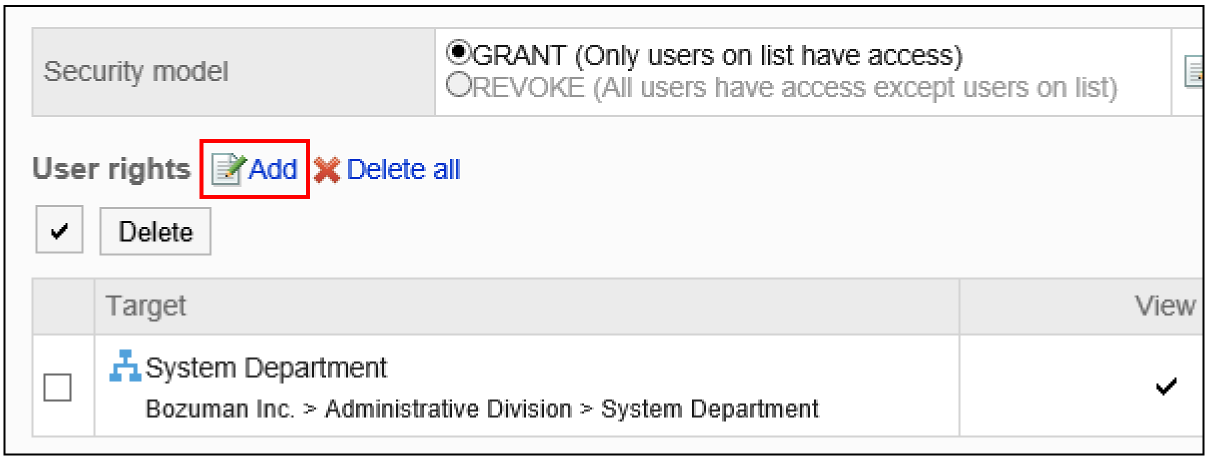


7. **On "User rights" screen, check that the security model is "GRANT (Only users on list have access)".**

If the security model is set as "REVOKE (All users have access except users on list)", click "Change" to change the setting to "GRANT (Only users on list have access)". For details, refer to Changing the Security Model(48Page).



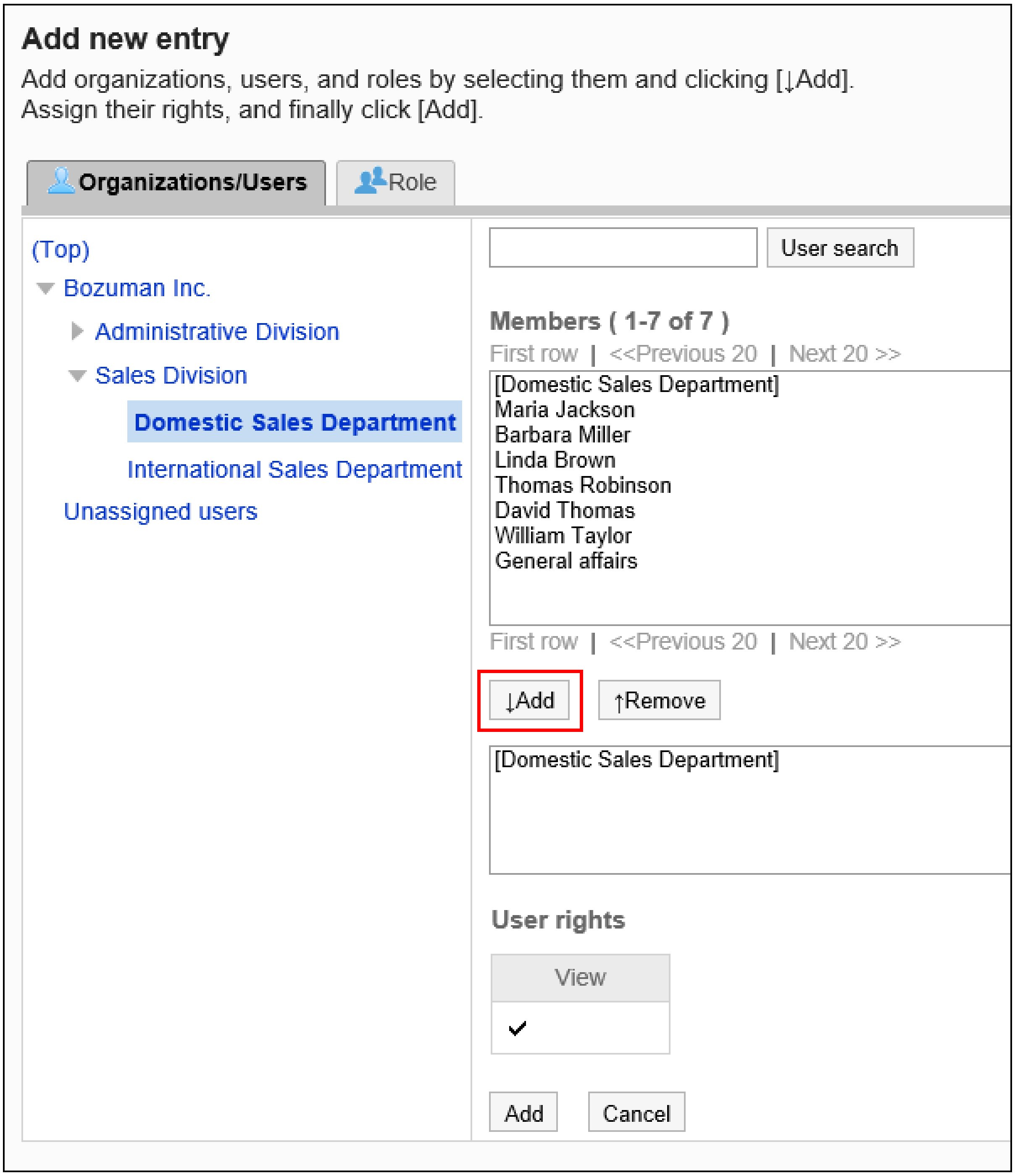
8. **Click "Add" in "User Rights".**



9. On the "Add new entry" screen, select the organization, user, or role, and then click "Add".

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



10. Confirm your settings and click "Add".

Deleting User Rights

Delete access permissions granted to users and departments.

If you delete user rights, actions that users can perform changes as follows depending on the security model:

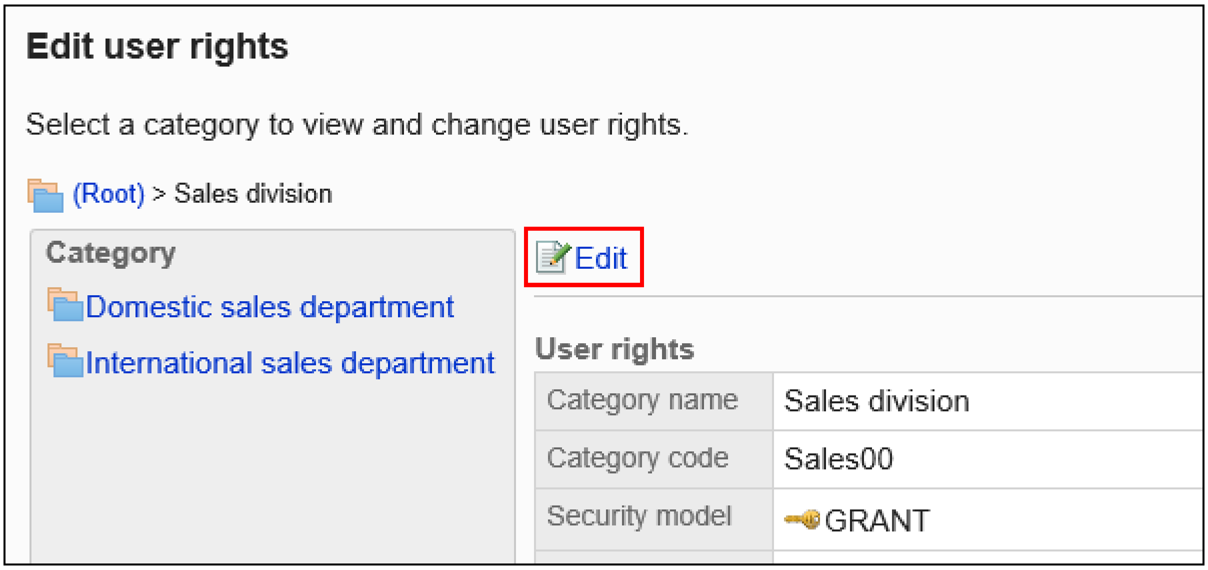
- If the security model is "GRANT (Only users on list have access)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights no longer be able to work with items they previously could.
- If the security model is "REVOKE (All users have access except users on list)":
  Users who were deleted the user rights or users who belonged to the departments or roles that lost user rights can now work with items they prohibited to use.

Selecting and Deleting User Rights

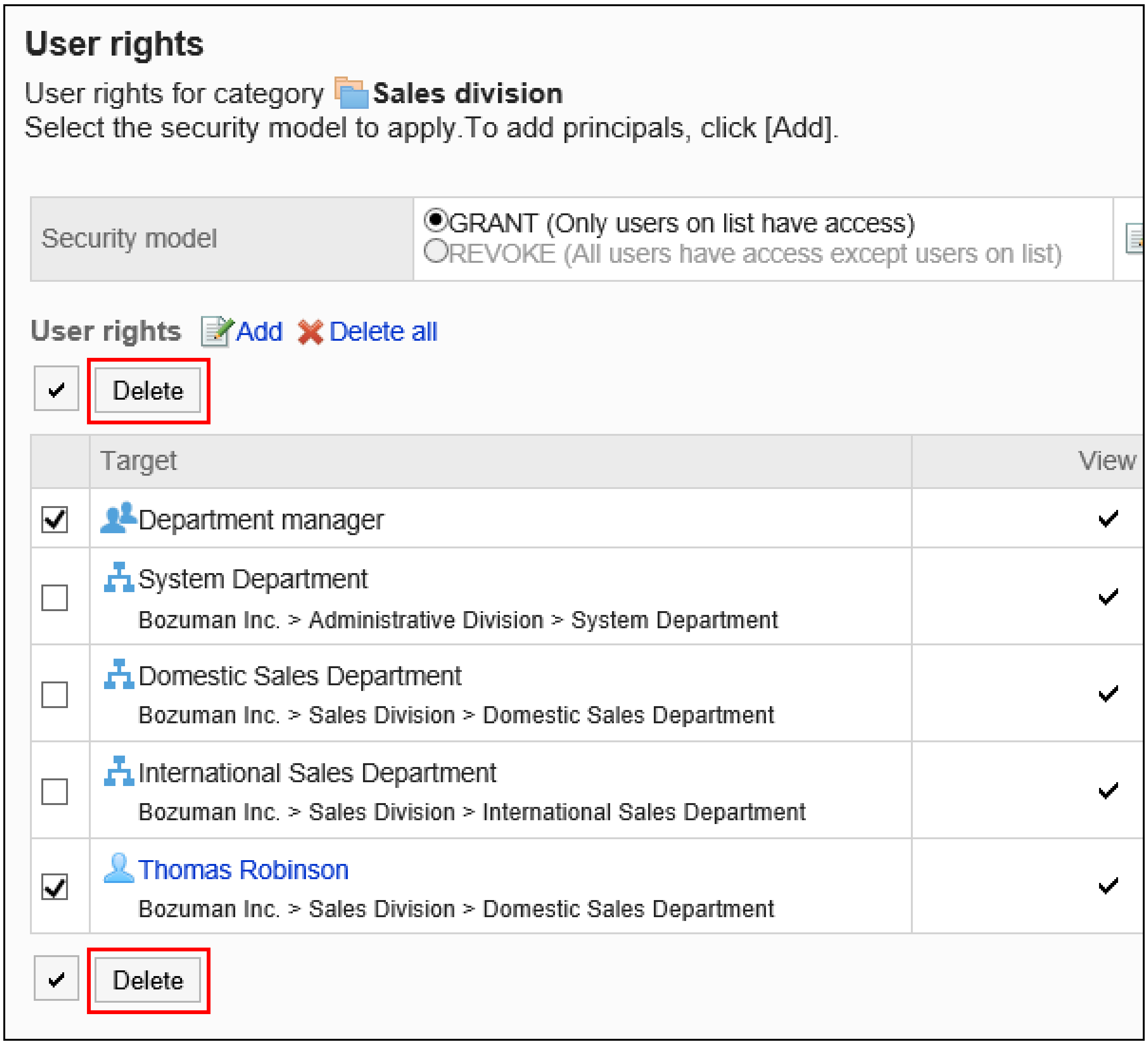
Select and delete user rights.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click "Edit user rights".**
6. **On the "Edit user rights" screen, select a category and click "Edit".**



7. **On "User rights" screen, select the check boxes of the departments, users, or roles to delete, and then click "Delete".**



8. **Click "Yes" on "Delete user rights" screen.**

Deleting All User Rights

Delete all user rights.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

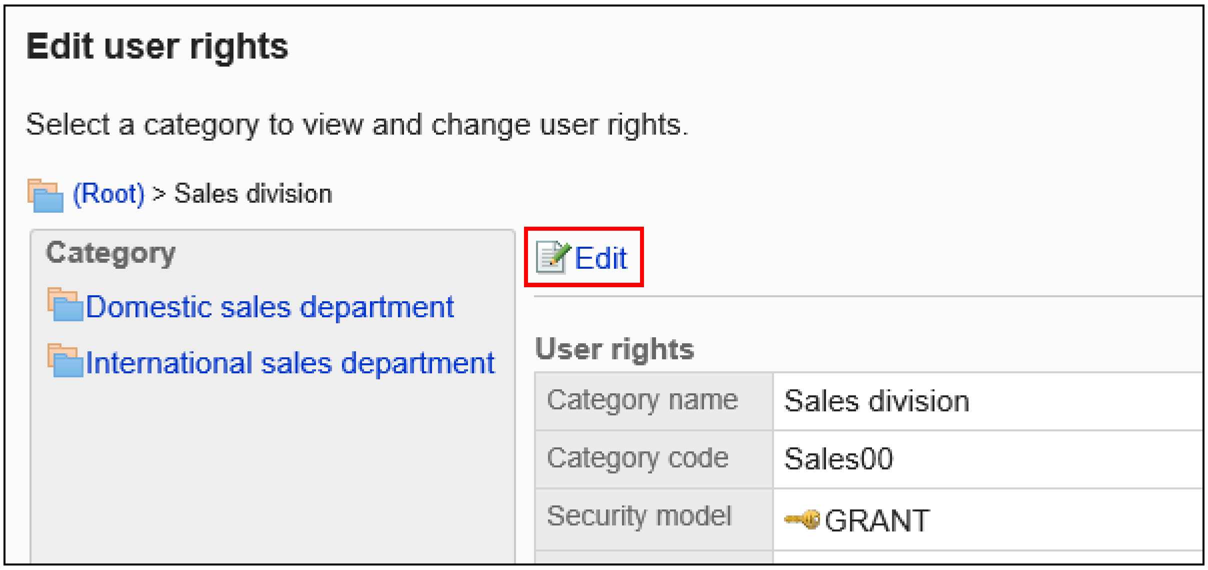
2. **Click "System settings".**

3. **Select "Application settings" tab.**

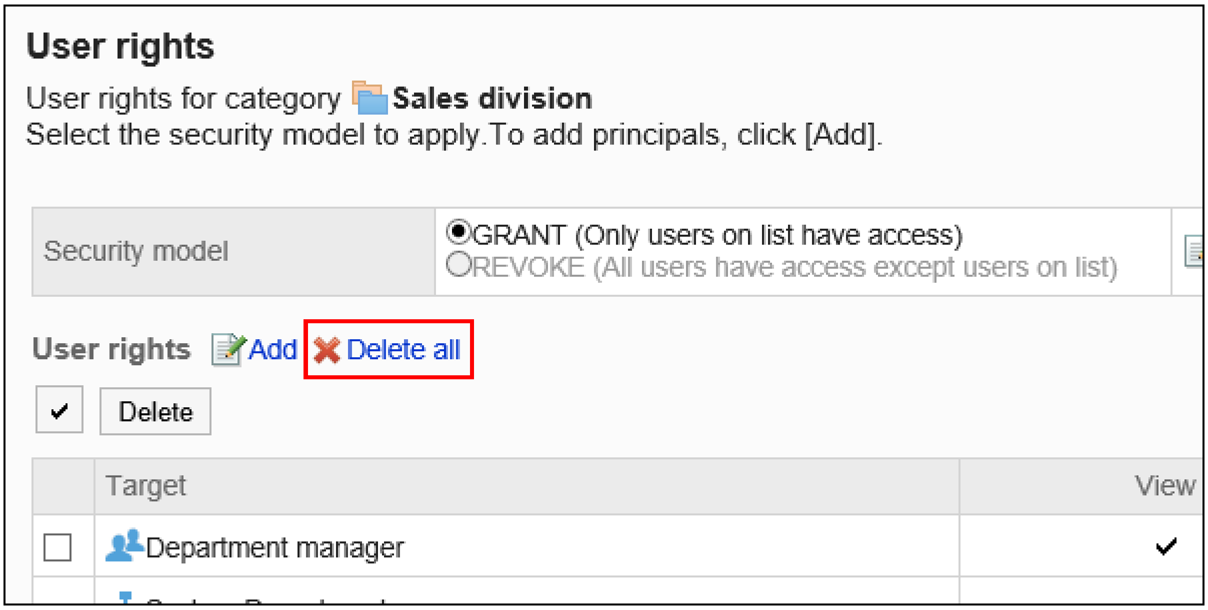
4. **Click "MultiReport".**

5. **Click "Edit user rights".**

6. **On the "Edit user rights" screen, select a category and click "Edit".**



7. **On "User rights" screen, click "Delete all".**

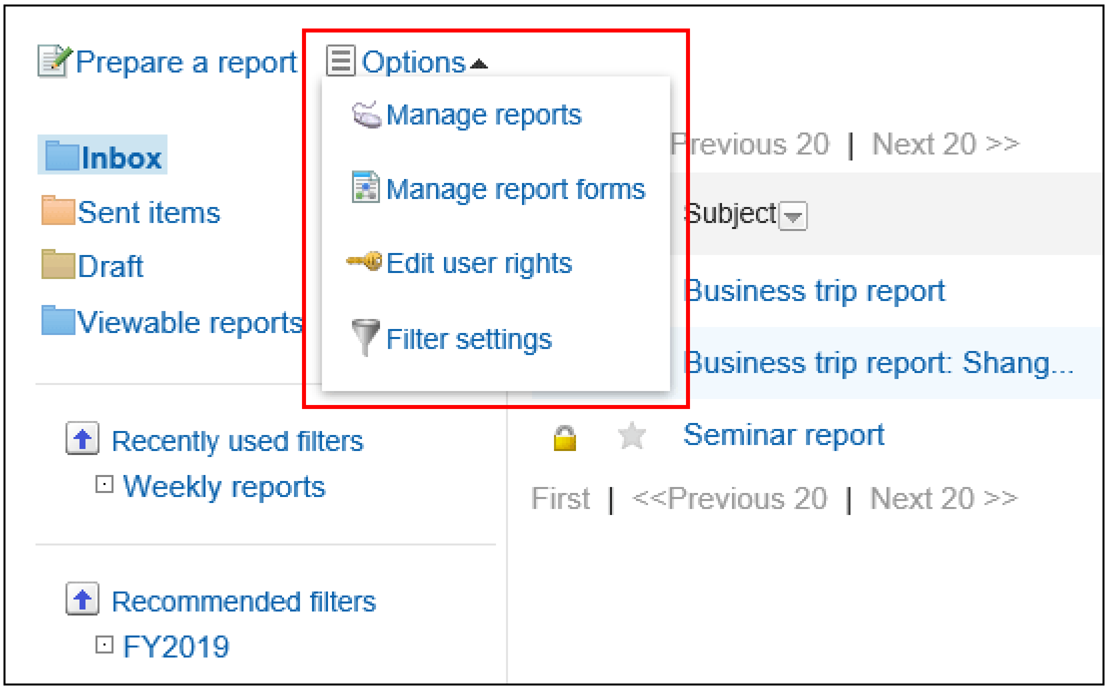


8. **Click "Yes" on "Delete all user rights" screen.**

2.14.2.3. Setting Operational Administrative Privileges for Categories

For categories, set operational administrators for departments, users, or roles.
Operational administrators can manage categories that they have permissions to use, as well as reports and report forms in their subcategories.
You use "Options" field on the user screen. The following menus are listed in the "Options" field:

- Manage reports:
  For details, refer to Managing Reports(1574Page).
- Manage report forms:
  For details, refer to Setting up Report Forms(1513Page).
  They also can view report forms in categories that they do not have operational administrative permissions.
- User Rights settings:
  For details, refer to Setting Access Permissions for Categories(1502Page).
- Filter settings:
  For details, refer to Setting up Report Filters(1560Page).



Adding Operational Administrative Privileges

Grant operational administrative privileges for each category.
You cannot grant operational administrative privileges to "(Uncategorized)" categories.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

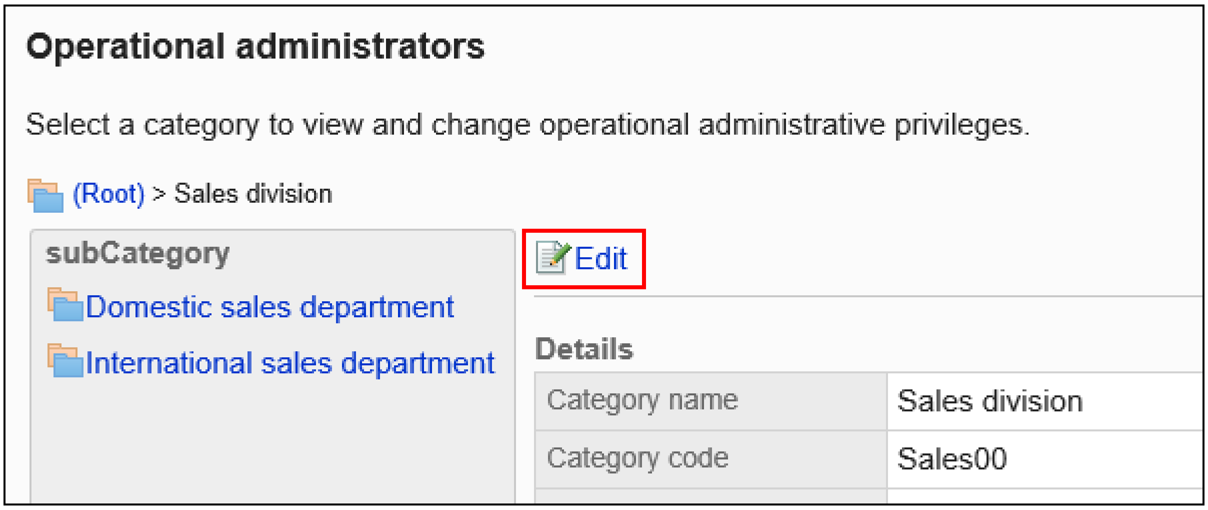
2. **Click "System settings".**

3. **Select "Application settings" tab.**

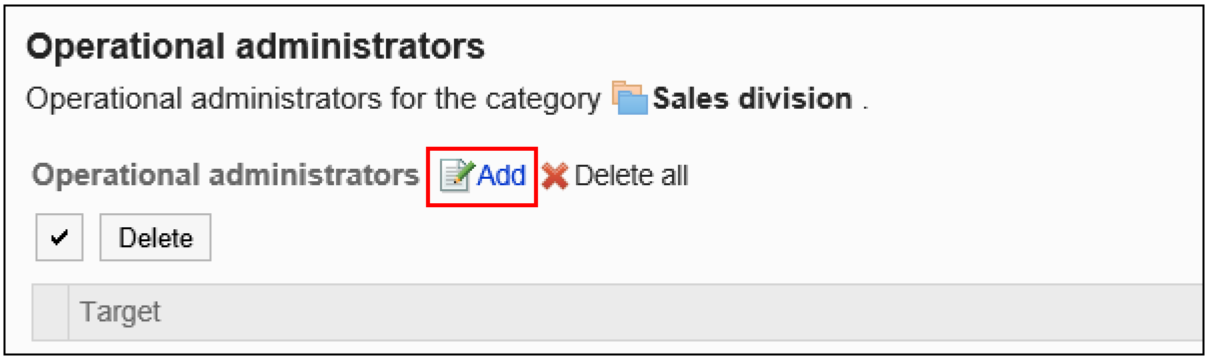
4. **Click "MultiReport".**

5. **Click "Operational administrators".**

6. **On "Operational administrators" screen, select a category and click "Save".**



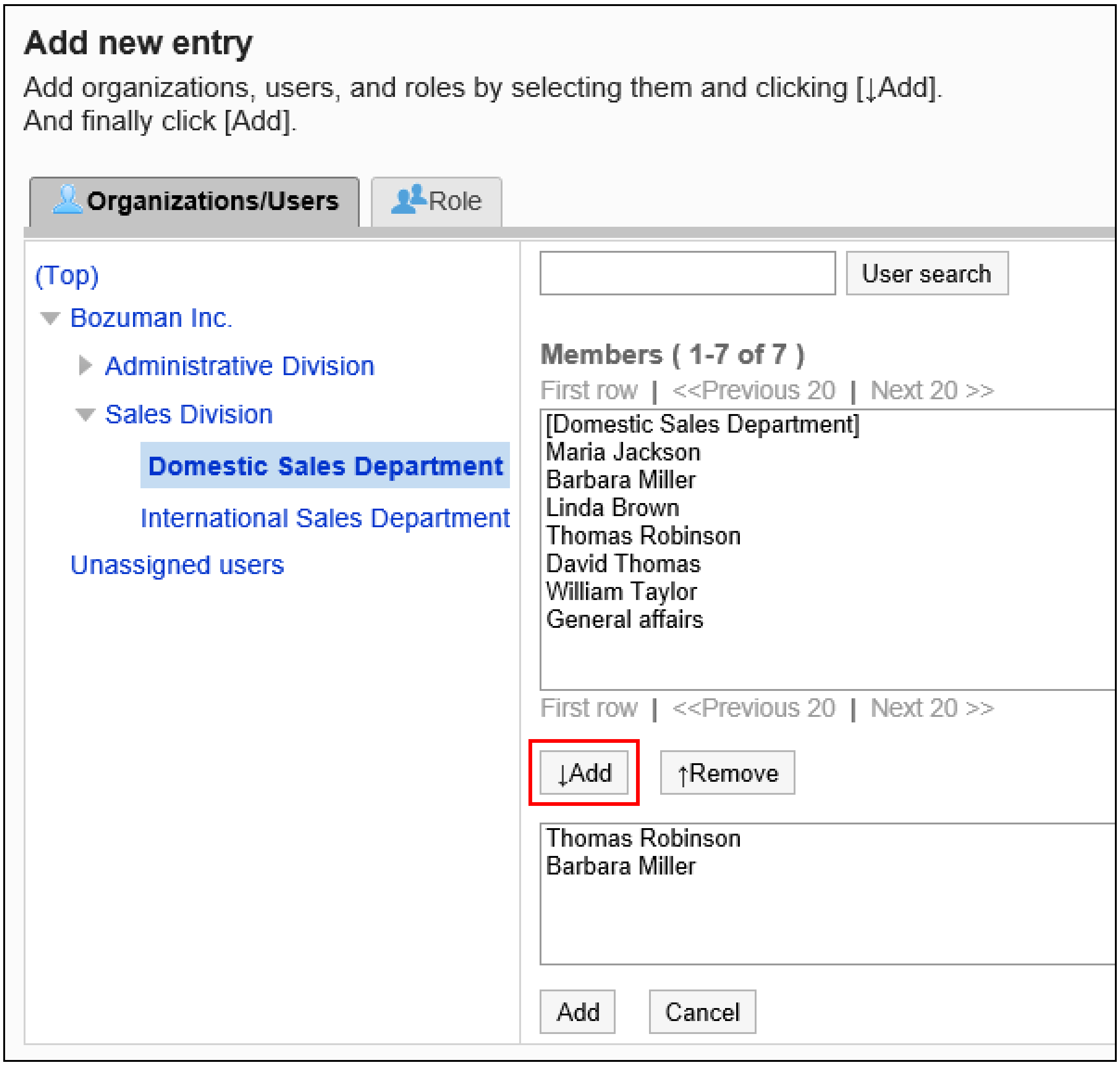
7. **On the screen for operational administrative privilege list, click "Add".**



8. **On the screen to add operational administrative privileges, select the department, user, or role to grant operational administrative privileges, and then click "Add".**

To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



9. Confirm your settings and click "Add".

Deleting Operational Administrative Privileges

Delete operational administrative privileges granted to departments and users.

Selecting and Deleting Operational Administrative Privileges

Select the operational administrative privileges to delete.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

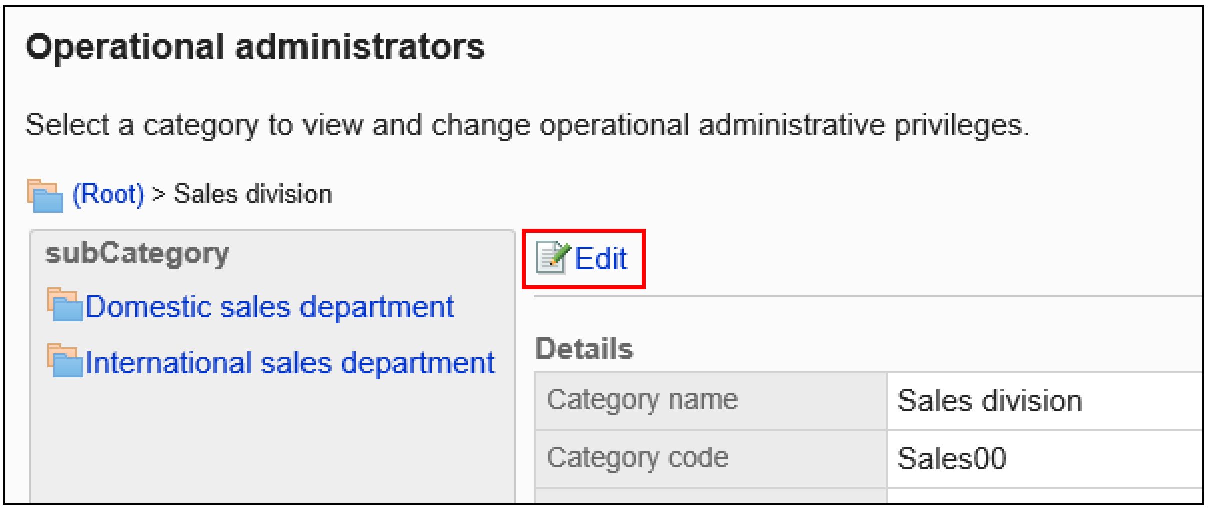
2. **Click "System settings".**

3. **Select "Application settings" tab.**

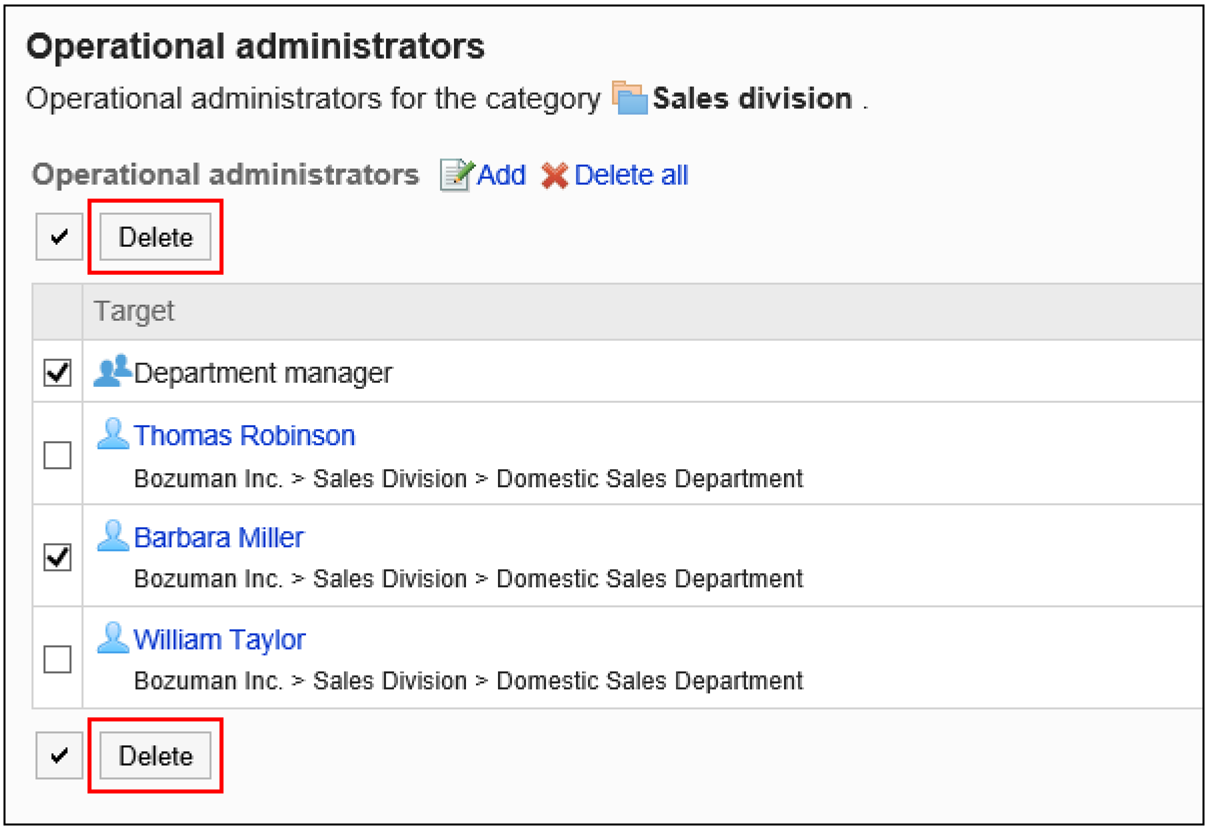
4. **Click "MultiReport".**

5. **Click "Operational administrators".**

6. **On "Operational administrators" screen, select a category and click "Save".**



7. **On the screen for operational administrative privilege list, select the check boxes of the organizations, users, or roles to delete operational administrative privileges, and then click "Delete".**



8. Click "Yes" on the screen to delete all operational administrative privileges.

Deleting All Operational Administrative Privileges

Delete all operational administrative privileges.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

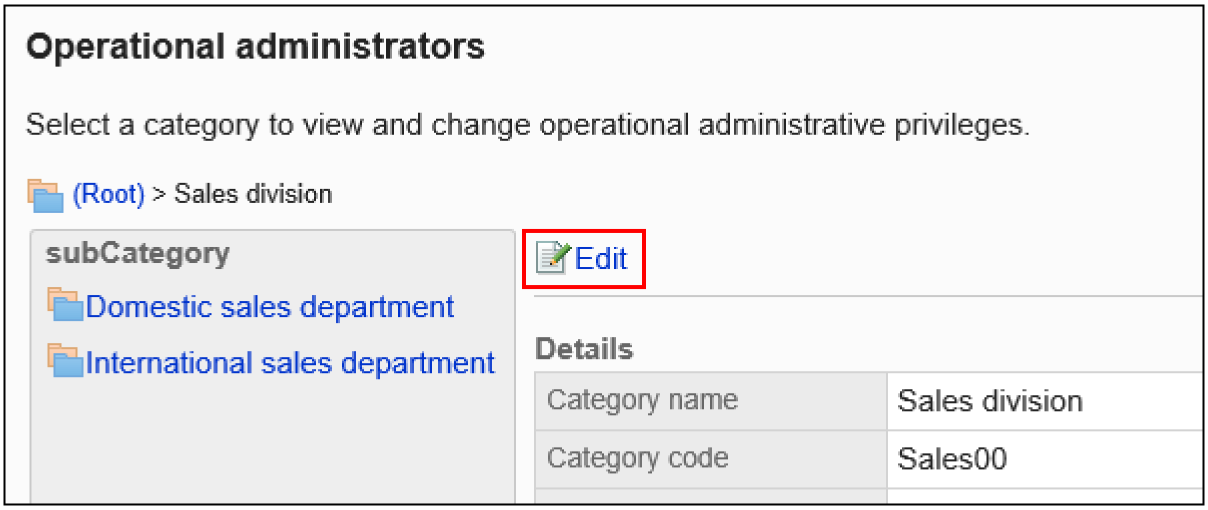
2. Click "System settings".

3. Select "Application settings" tab.

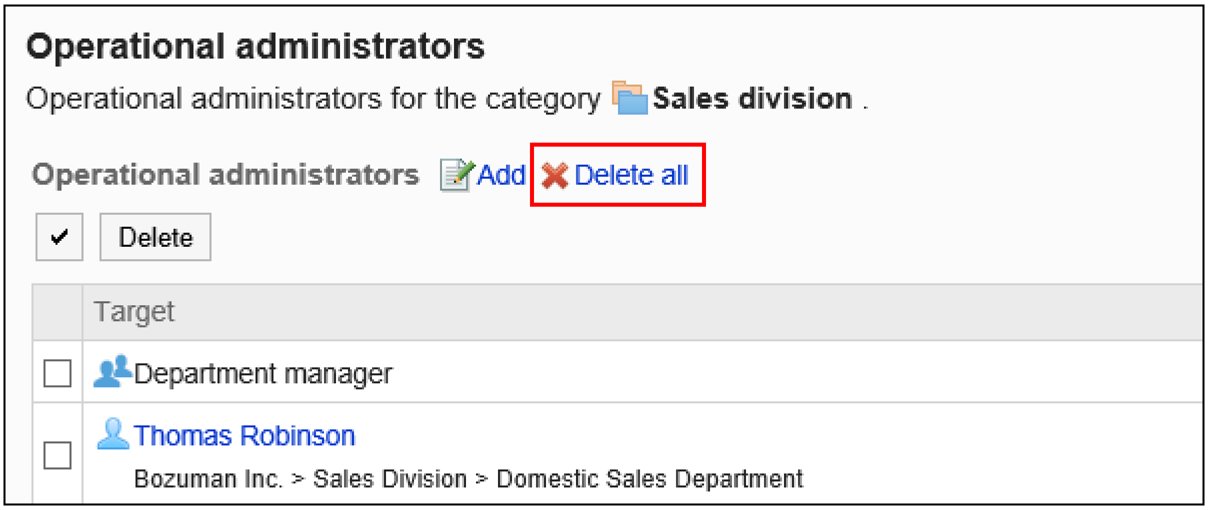
4. Click "MultiReport".

5. Click "Operational administrators".

6. On "Operational administrators" screen, select a category and click "Save".



7. On the screen for "List of operational administrative privilege", click **Delete all**.



8. Click "Yes" on the delete all operational administrative privileges screen.

2.14.3. Setting up Report Forms

Report forms are forms to use to enter fields in reports.

For each report form, set required input fields.

References

- Setting Categories(1492Page)

- Adding Report Forms(1514Page)
- Adding Items(1534Page)
- Previewing Report Forms(1559Page)
- Enabling Report Forms(1531Page)

2.14.3.1. Adding Report Forms

Add report forms to categories.

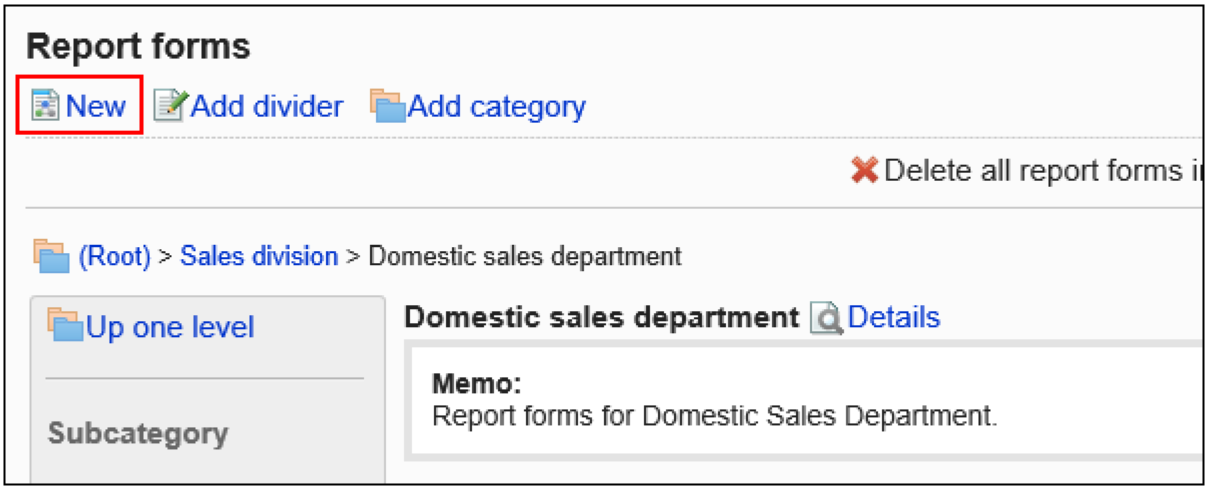
You can set report form names and whether to allow users to add comments to the reports.

You cannot add report forms to "(Root)".

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click to add report forms.**

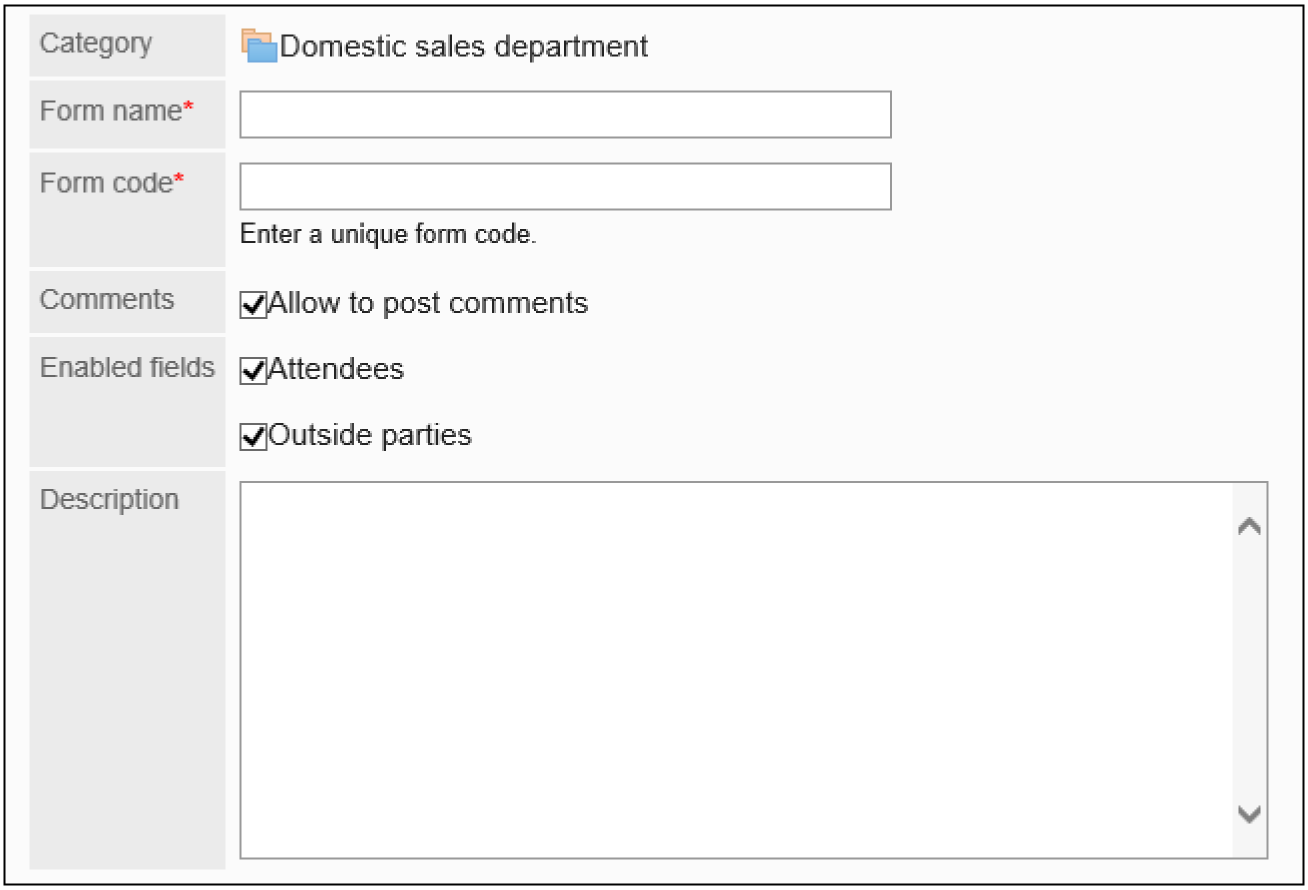
   If you do not have categories to add your reports, add categories. For details, refer to Setting Categories(1492Page).

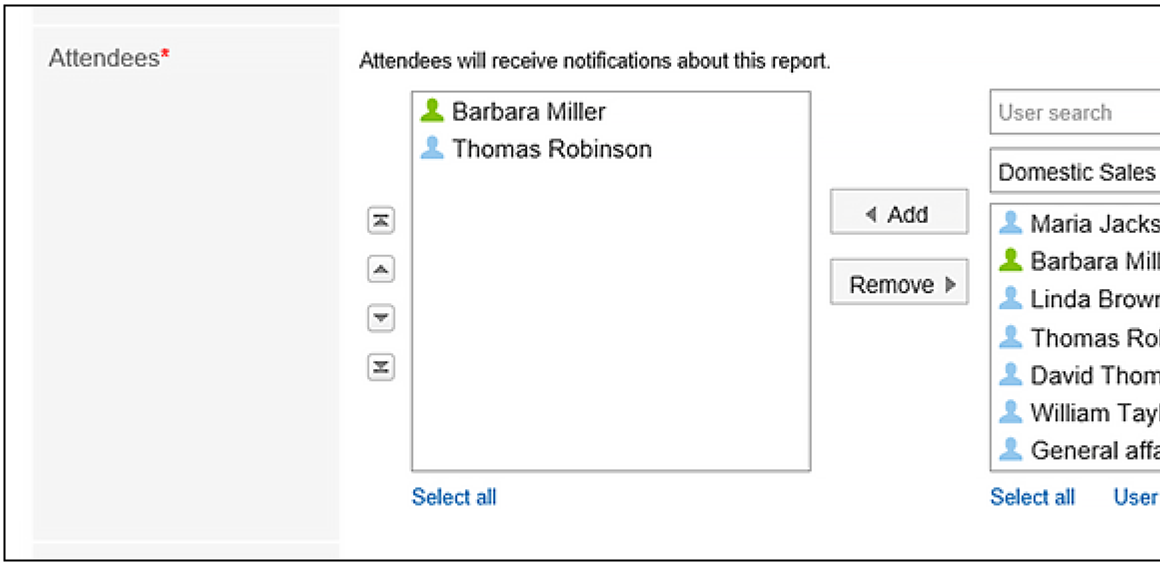
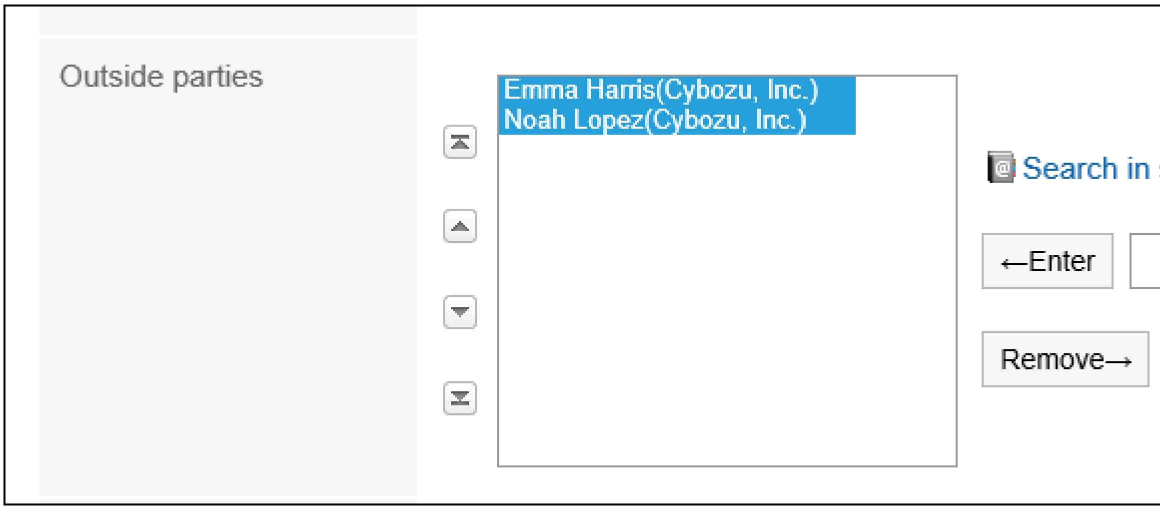


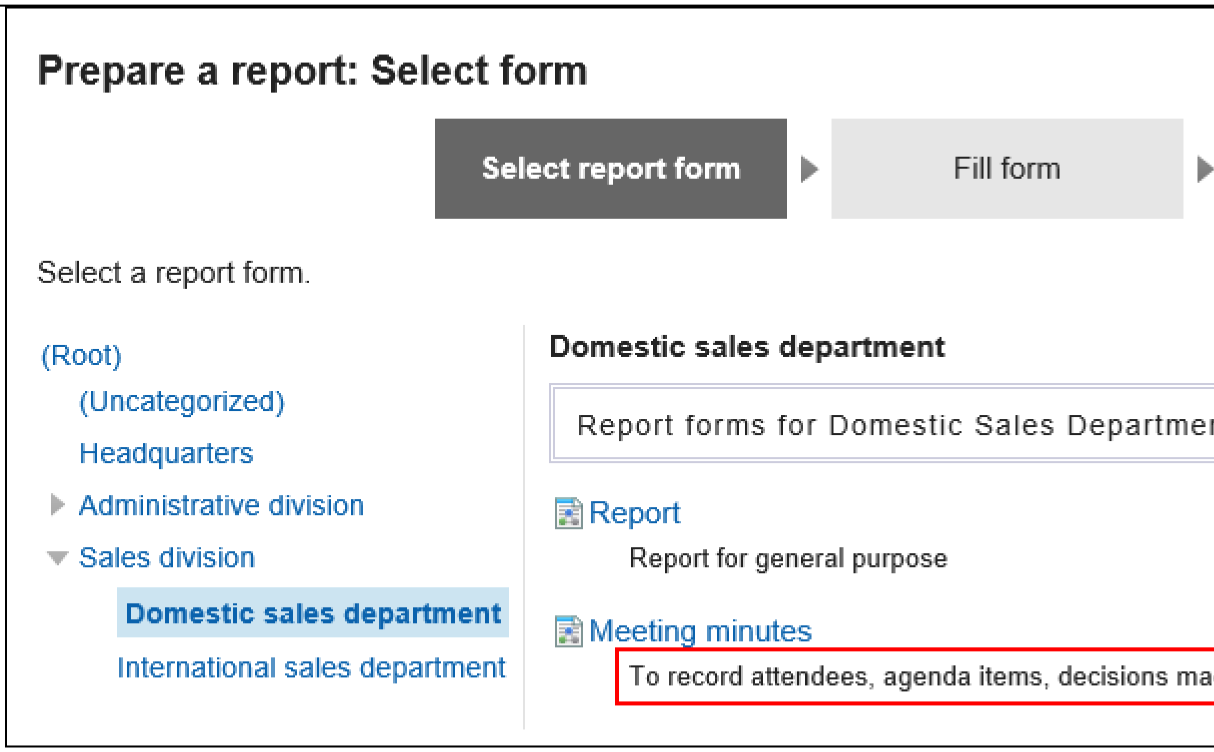
7. **On the screen to add report forms, set the required items.**

8. **Confirm your settings and click "Add".**

Items to Set in Report Forms



Item	Description
Form name	Enter a report form name.
Report Form Code	Enter a report form code. This is a unique code for identifying report forms.
Post comments	Set whether to allow users to add comments in the report.
Fields to use	Select whether to use the following fields in the report form: • Participants: This is used to set up users who participated in the conference from Garoon users.  • Outside parties: This is used to set up customers who joined the conference from the addresses in shared Address 
Description	Enter a description for the report form. The information entered are displayed on the screen to create reports (select report forms) of users.

Item	Description
	

2.14.3.2. Copying Report Forms

Copy an existing report form to create a new report form in the same category.
The report form copied also has report form information and items from the original report form.

Steps:

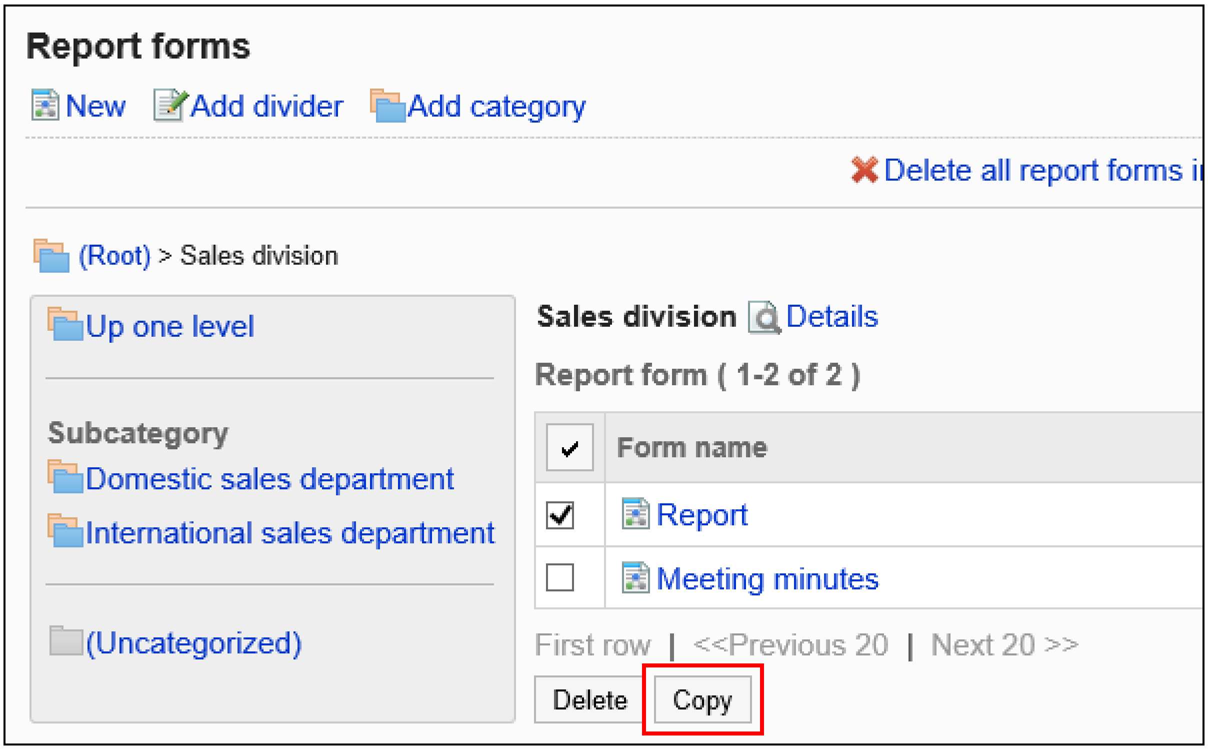
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**

6. **On the report form list screen, select a category.**

7. **Select a check box for the report form to copy, and then click "Copy".**

The newly created report form is displayed at the bottom of the report form list.

The default value of the report form name is "copy of (original report form name)".



8. **Change the report form contents and fields as needed.**

For details, refer to the following page:

[Changing Report Forms(1518Page)]

[Setting up Items in Report Forms(1533Page)]

[Enabling Report Forms(1531Page)]

2.14.3.3. Changing Report Forms

Change notes for administrators and basic information in report forms.

Changing Notes for Administrators

You can add work histories and notes in notes for administrators.

The notes for administrators are displayed only on system administration screens. They are not shown on user screens.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

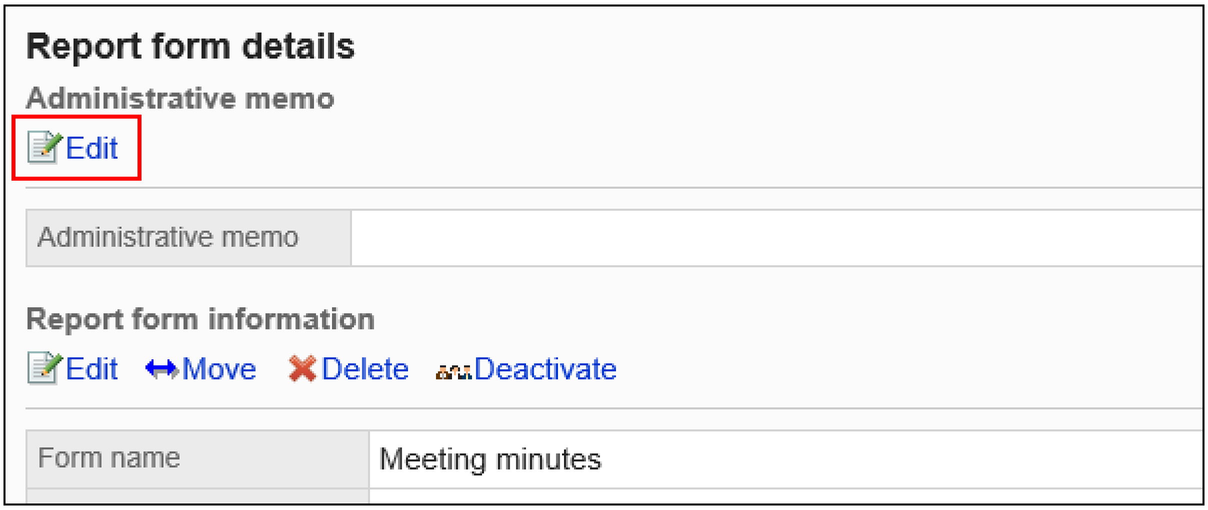
3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

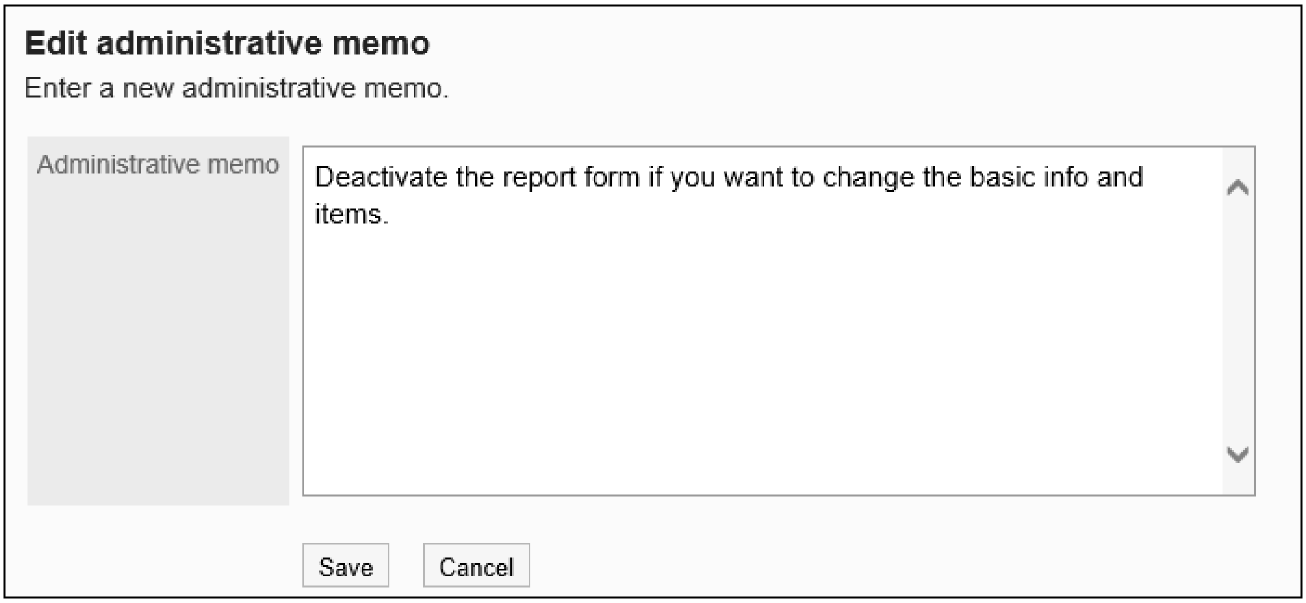
5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click the report form name of the report form to change the administrative notes.**

7. **On the report form details screen, click "Save" in the notes for administrators.**



8. **On the screen to change notes for administrators, enter your work history and notes.**



9. Confirm your settings and click "Save".

Changing Report Form Information

Change basic information in report forms.

Changes to the report form information are reflected in the following report: The changes are not applied to existing reports.

- Newly created reports
- Reports that you create by reusing existing reports
- Draft reports that you changed after the report form information has been changed

We recommend that you disable the report forms(1532Page) to prevent users from using them while working with them.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

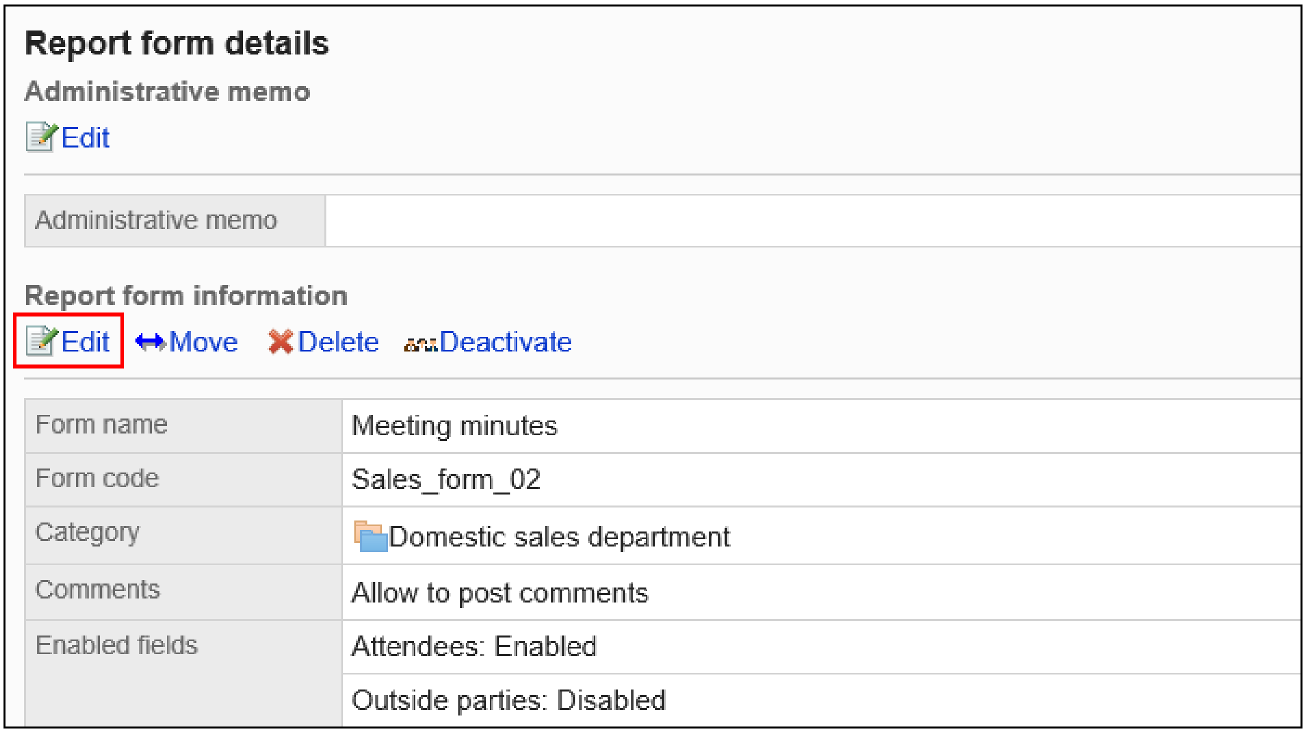
3. Select "Application settings" tab.

4. Click "MultiReport".

5. Click the report form list.

6. On the screen for report form list, select a category, and then click the report form name of the report form to change basic information.

7. On the report form details screen, click "Save" in report form Information.



8. On the screen to change report forms, set the required items.

For details, refer to Items to Set in Report Forms(1515Page).

9. Confirm your settings and click "Save".

2.14.3.4. Moving Report Forms

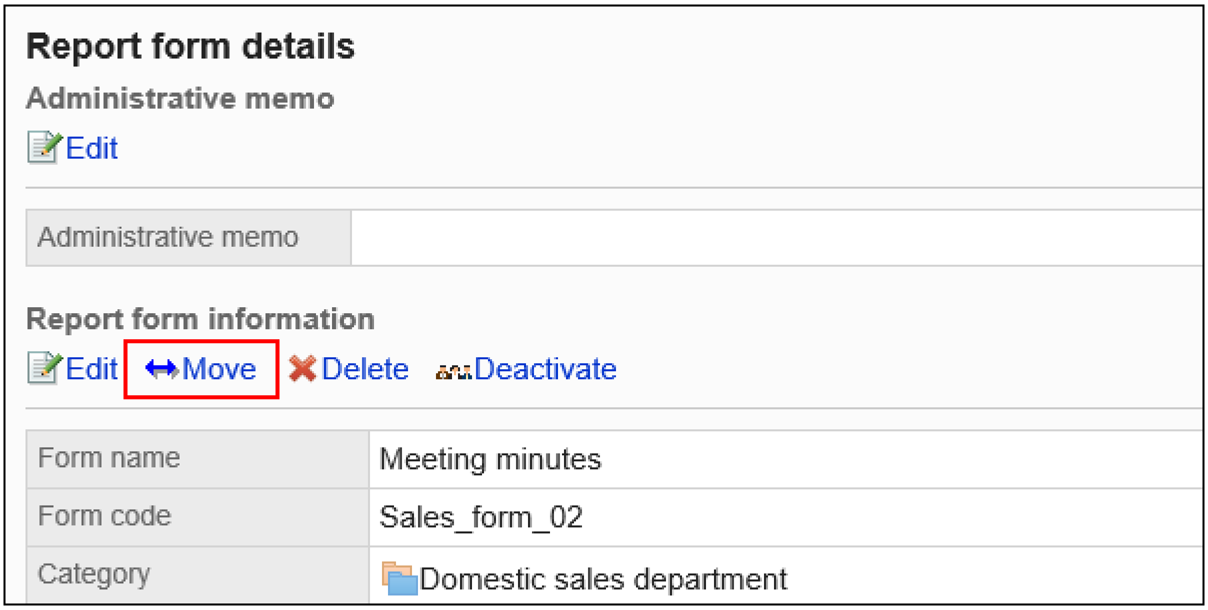
Move report forms to other categories.

Note

- If the destination category has user rights set for it, the report forms may not be available to users depending on their user rights. Check the user rights of the destination category before moving report forms.
  For details, refer to Setting Access Permissions for Categories(1502Page).

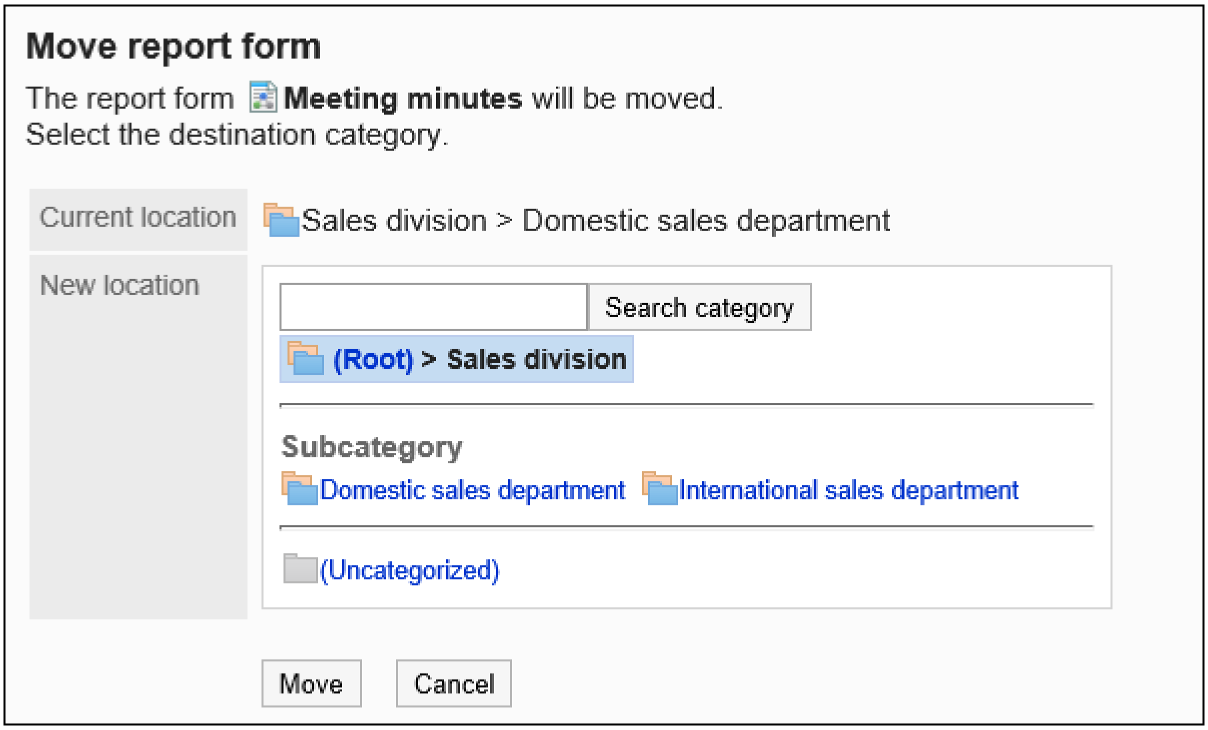
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click report form names of the report forms to move.**
7. **On the report form details screen, click "Move" in report form Information.**



8. **On the screen to move report forms, select the target category.**

   You can search for categories to move categories into by entering keywords and clicking "Category search".
   Clicking on a category name moves you to the subcategory of the category you clicked.



9. **Confirm your settings and click "Move".**

2.14.3.5. Deleting Report Forms and Dividers

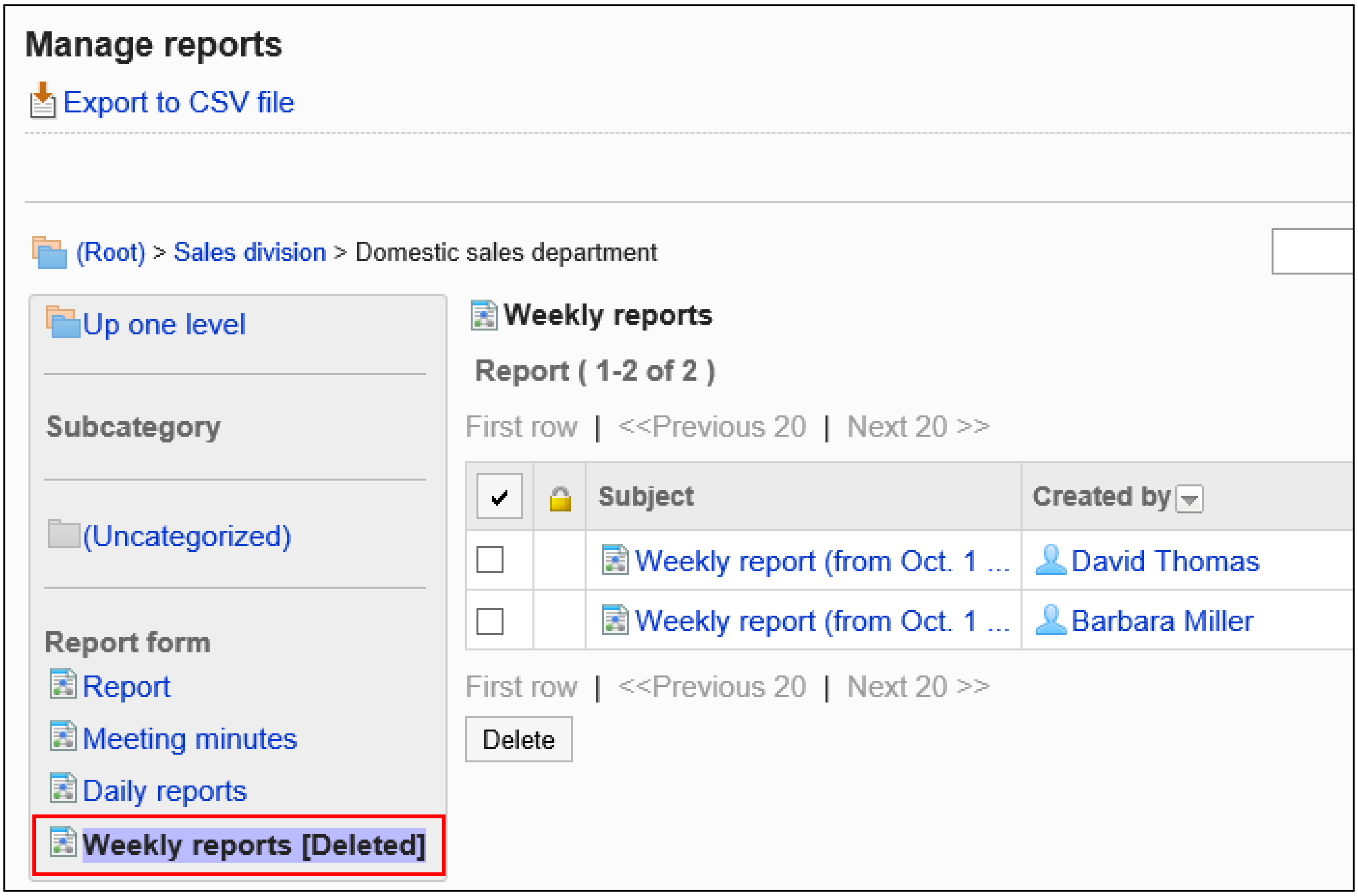
Delete report forms and separator lines.

Deleting report forms does not delete reports and draft reports already created. However, the following functions are disabled:

- Reusing the reports
- Changing the draft reports
- Reusing the draft reports

A report using the deleted report form remains in the same category before the deletion.

On "Manage reports" screen, "delete" is added after the deleted report form name.



Caution

- Deleted report forms cannot be restored.

Deleting Report Forms One by One

Delete report forms one by one.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

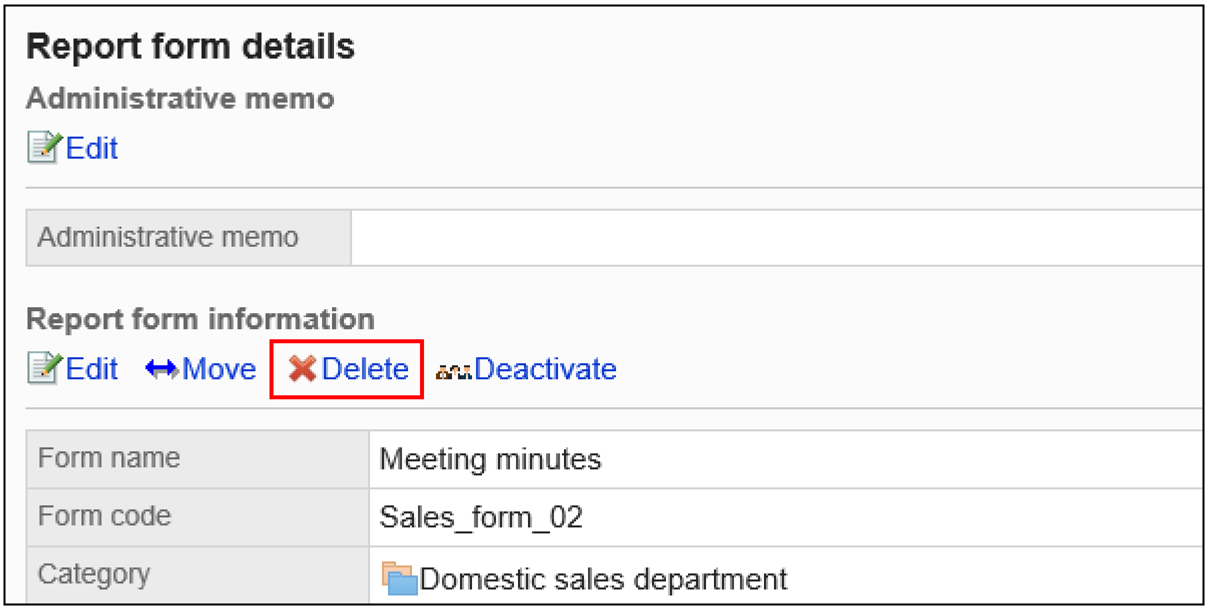
3. Select "Application settings" tab.

4. Click "MultiReport".

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click report form names of the report forms to delete.**

7. **On the report form details screen, click "Delete" in report form Information.**



8. **Click "Yes" on the screen to delete report forms.**

Deleting Multiple Report Forms and Dividers in Bulk

For each category, select report forms and separator lines to delete, and delete them all together.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

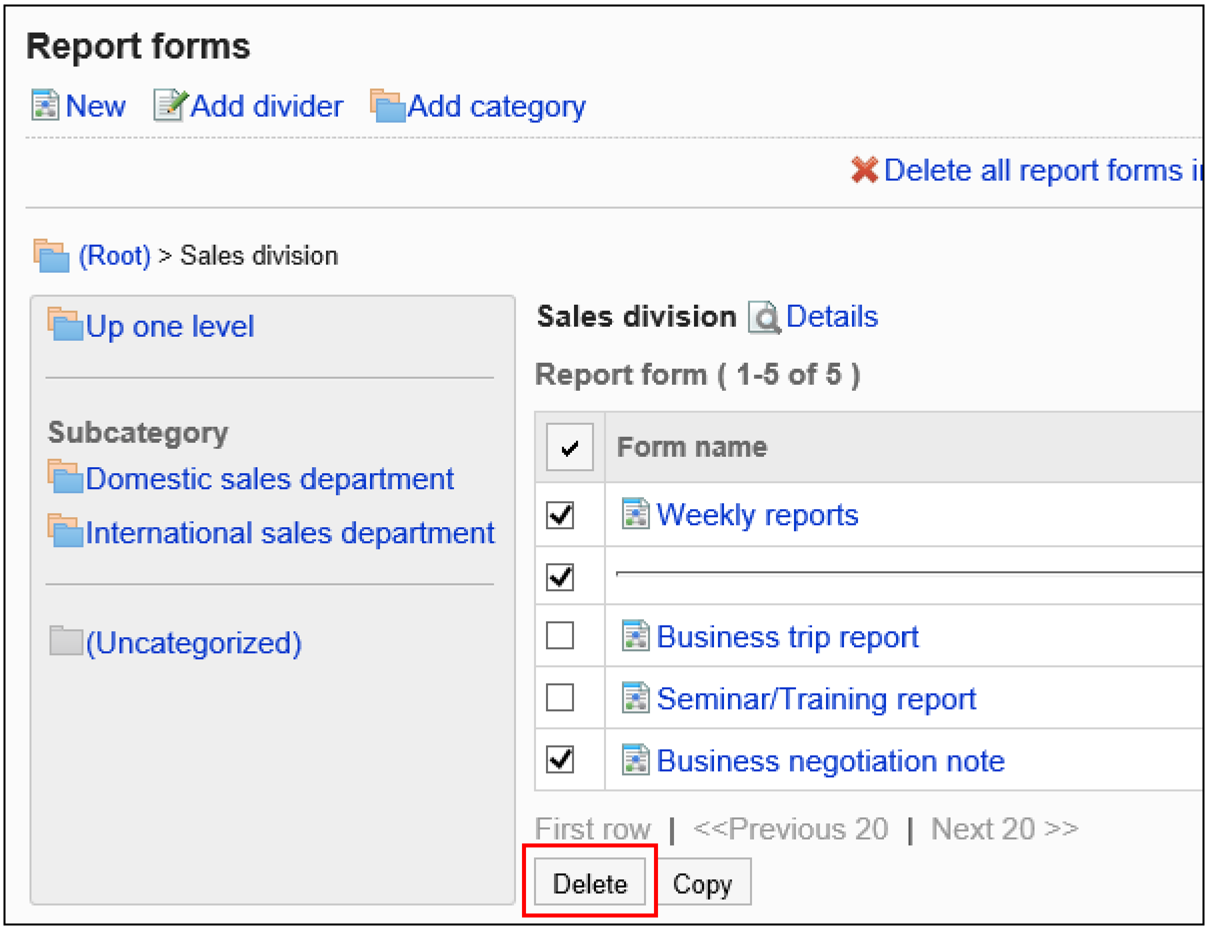
3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the report form list screen, select a category.**

7. **Select check boxes for the report forms or separator lines to delete, and then click "Delete".**



8. **Click "Yes" on the screen to delete report forms and separator lines in bulk.**

Deleting All Report Forms and Dividers in a Category

Delete all report forms and separator lines in a category.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

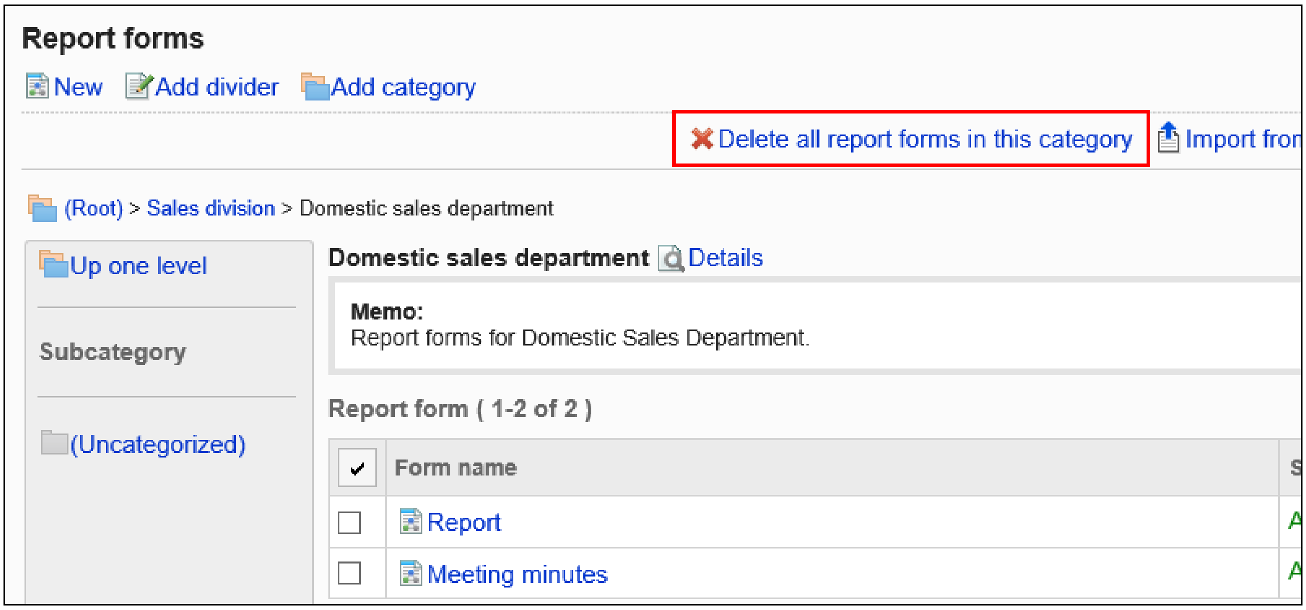
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click the report form list.**

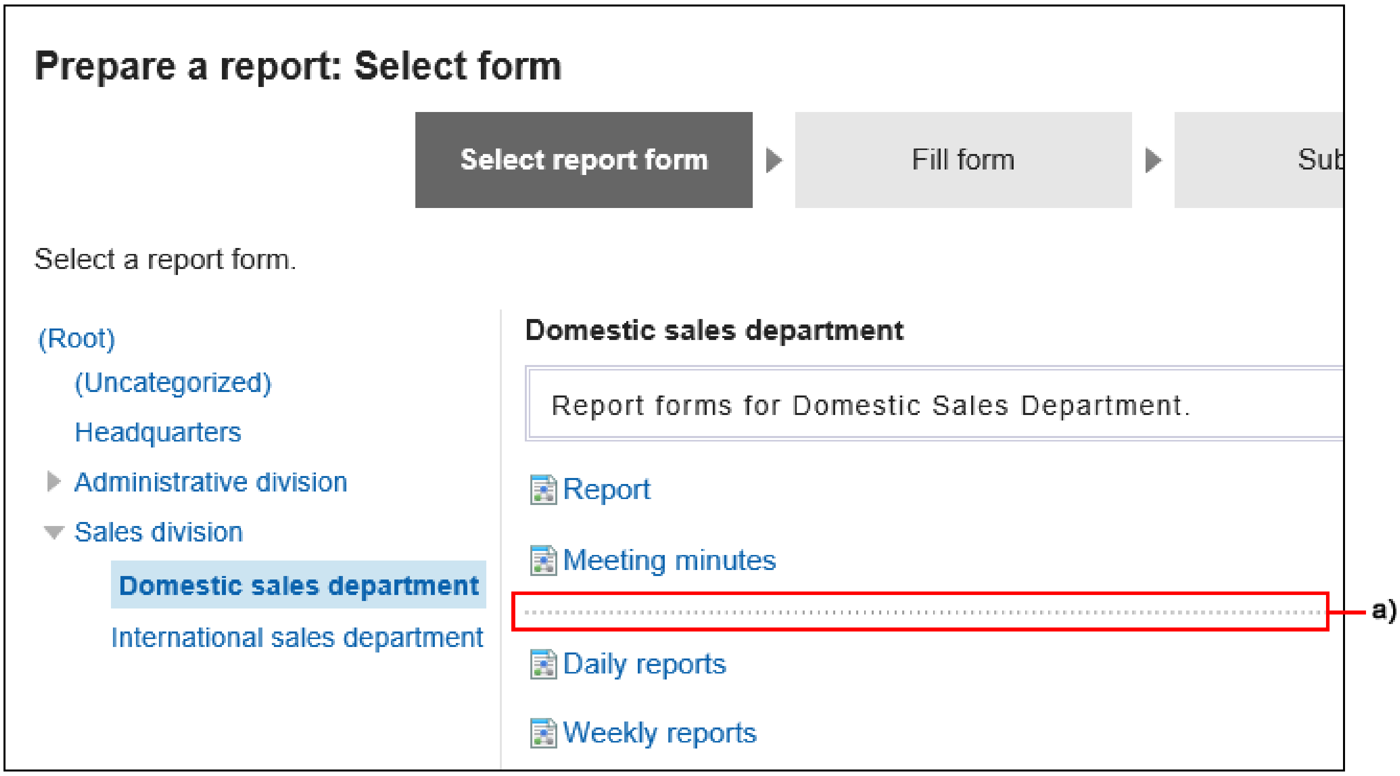
6. **On the screen for report form list, select a category, and then click the item to delete all report forms in the category.**



7. **Click "Yes" on the screen to delete all report forms in a category.**

2.14.3.6. Setting up Report Form Lists

On the screen for report form list, you can add separator lines or reorder report forms in the list for each category to organize them.
The order in which separator lines and report forms are displayed is also applied to the screen to create report forms of users.



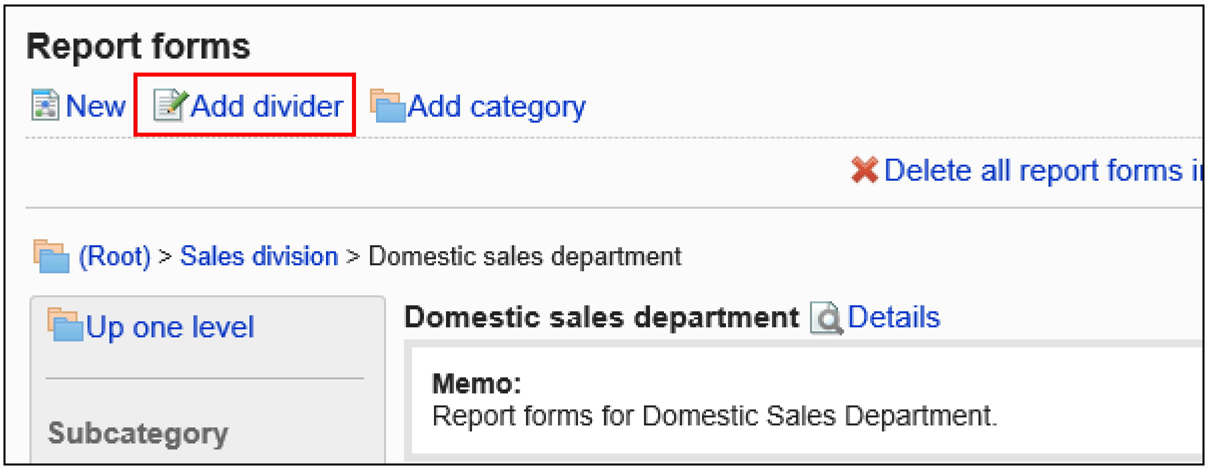
a): Dividers

Adding Dividers to the Report Form Lists

Adds separator lines to the report form list.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click to add separators.**



7. **Click "Yes" on the add separator lines screen.**

   The added separator lines are displayed at the bottom of the list.

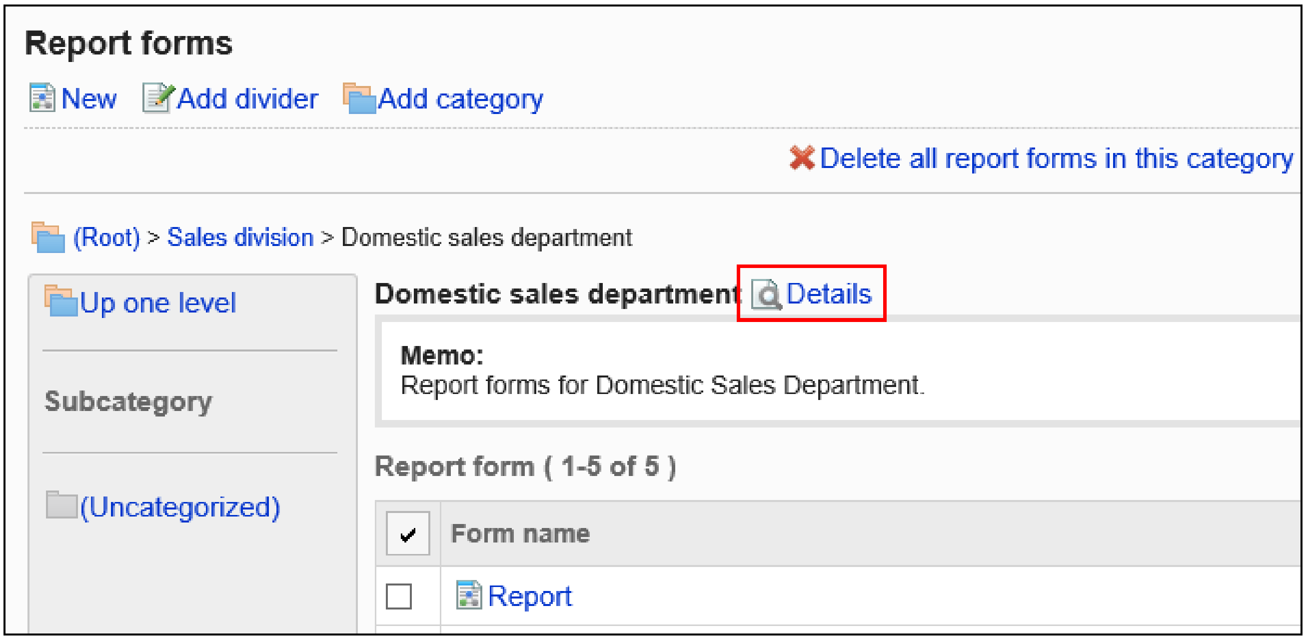
   Change the position of separators as needed.

Reordering Report Form Lists

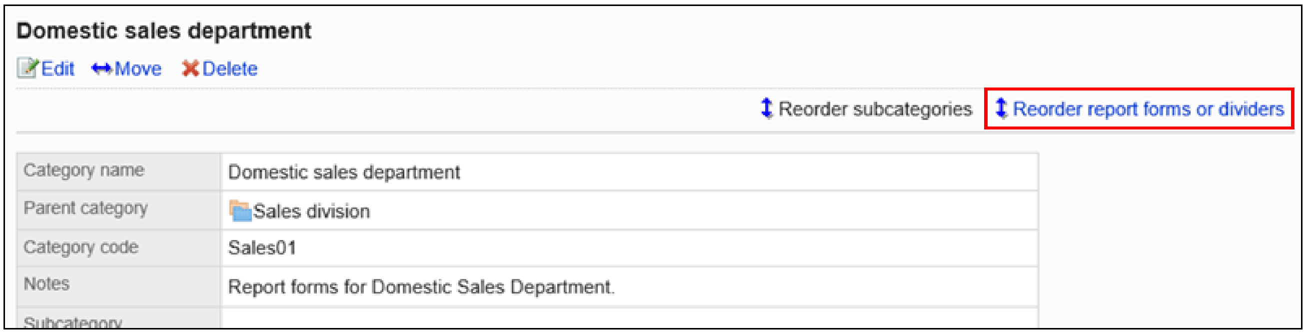
Change order of report forms and separator lines.

Steps:

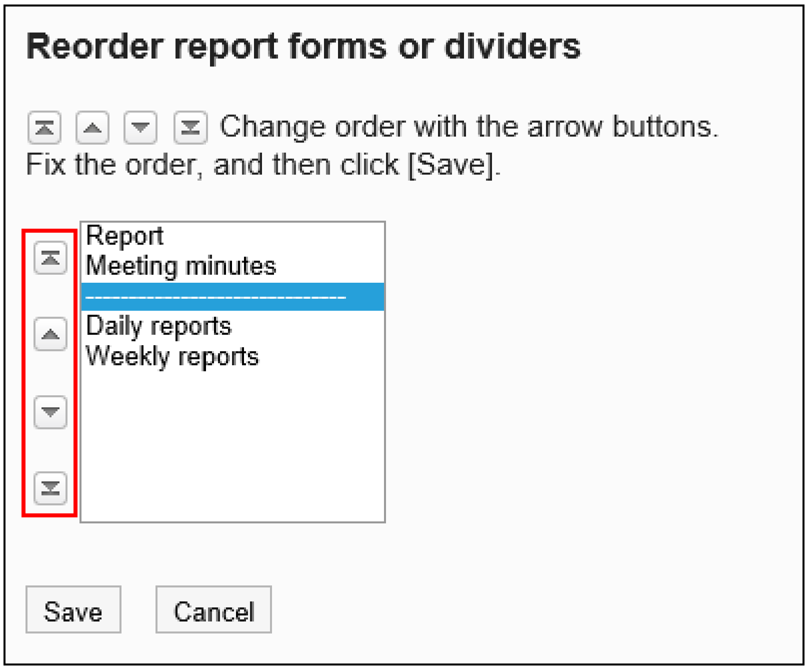
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click "Details".**



7. **On the screen for category details, click the item to reorder report forms/separator lines".**



8. **On the screen to reorder report forms and separator lines, change the order of them.**



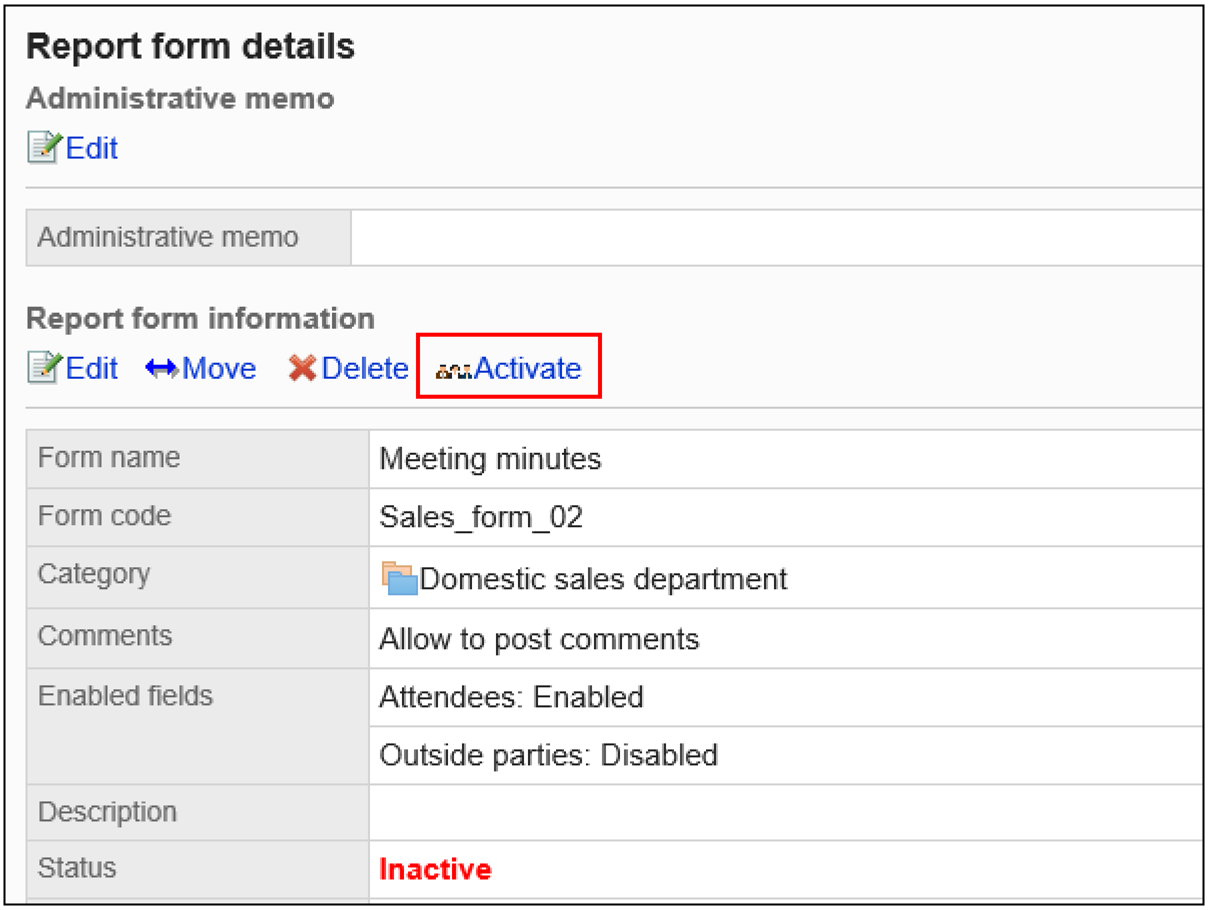
9. Confirm your settings and click "Save".

2.14.3.7. Enabling Report Forms

Allow users to use report forms.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click report form names of the report forms to activate.**
7. **On the report form details screen, click "Enable" in report form Information.**



8. **Click "Yes" on the screen to activate report forms.**

Disabling Report Forms

Prevent users from using report forms.

Report forms that you disabled does not appear on user screens.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

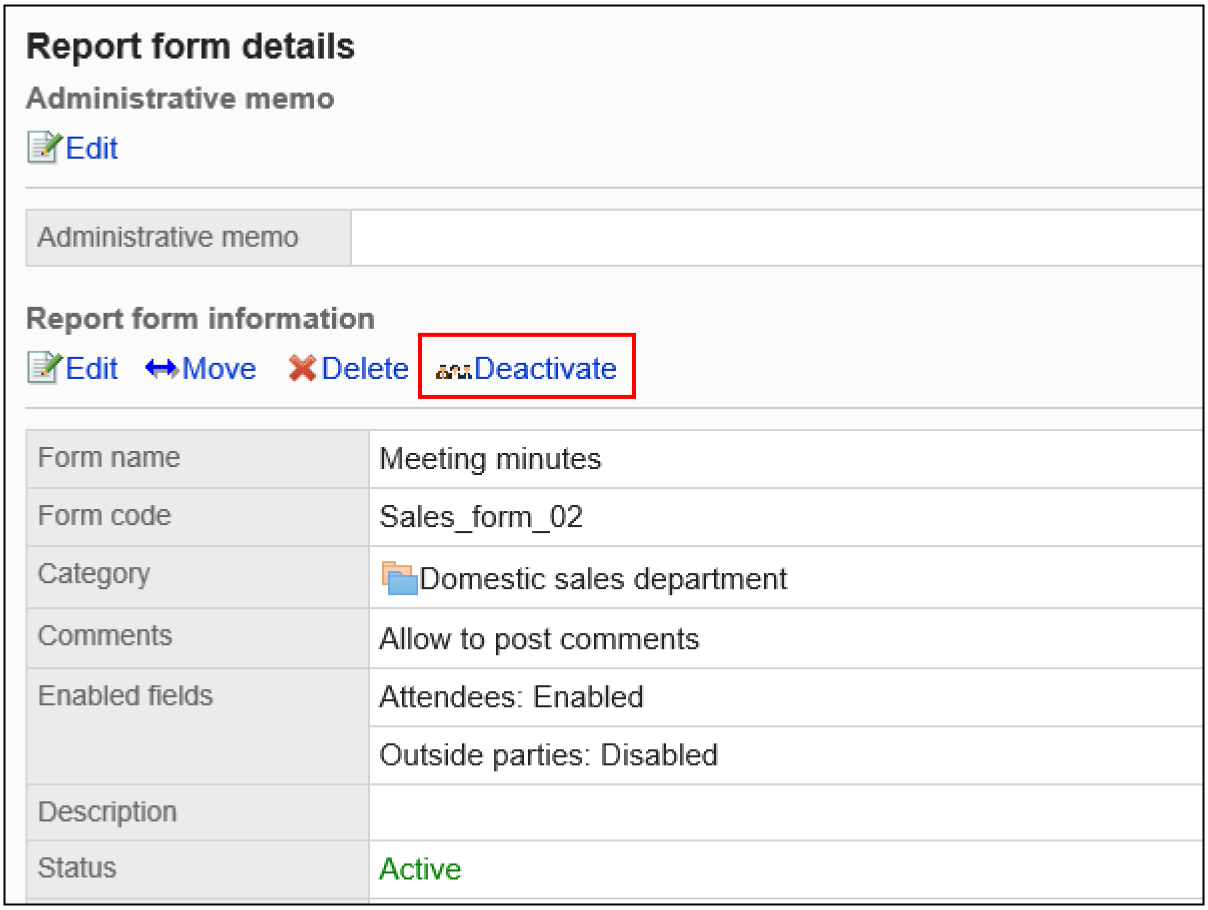
3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click report form names of the report forms to deactivate.**

7. **On the report form details screen, click "Disable" in report form Information.**



8. **Click "Yes" on the screen to activate report forms.**

2.14.4. Setting up Items in Report Forms

Items are input fields to use to enter data in report forms. By selecting input types and adding items, you can create report forms.

References

- Adding a report form(1514Page)
- Adding Items(1534Page)
- Item Types(1535Page)
- Previewing Report Forms(1559Page)

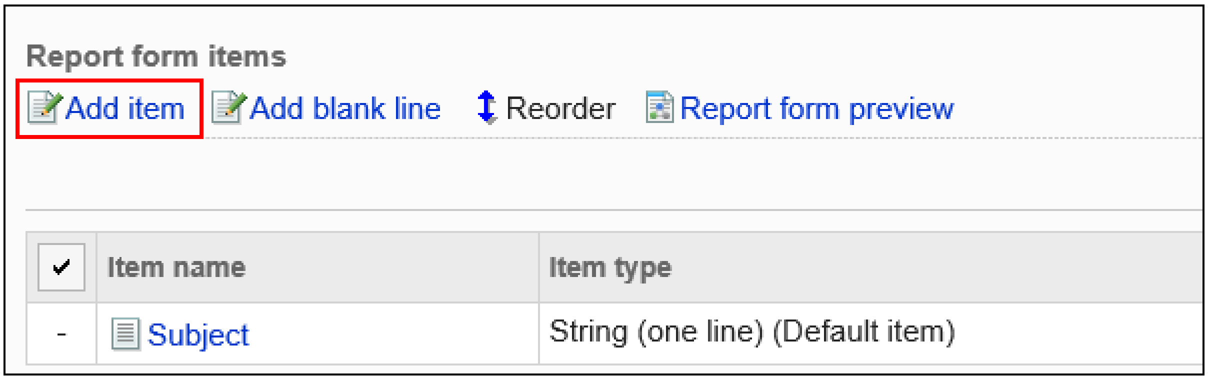
- Enabling Report Forms(1531Page)

2.14.4.1. Adding Items

Add items to report forms.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click the report form name of the report form to add items.**
7. **On the screen for report form details, click to add items in the report form list.**



8. **On the screen to add items, select an item type in "Type" field.**

The following types can be selected:

- String (one line)
- String (multiple lines)

- Menu
- Radio button
- Check box
- Number
- Date
- Time
- Attachment

9. Set the required items according to the type selected in step 8.

For details, refer to Item Types(1535Page).

10. Confirm your settings and click "Add".

11. On the preview screen, check the displayed items.

For details, refer to Previewing Report Forms(1559Page).

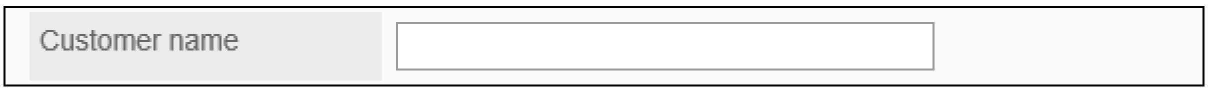
2.14.4.2. Item Types

This section describes types of items that can be set in report forms.

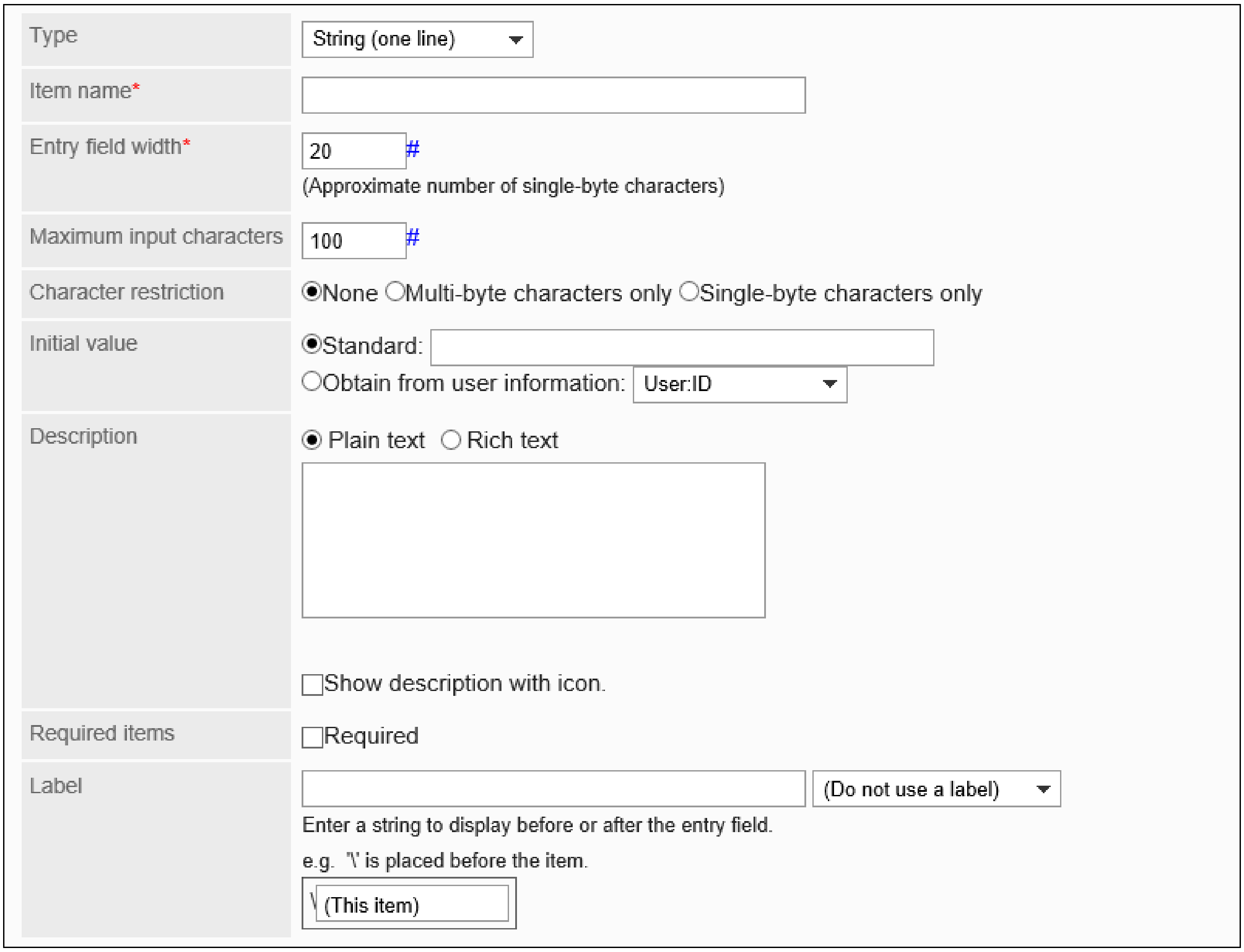
Setting items differ depending on the input type.

String (One Line)

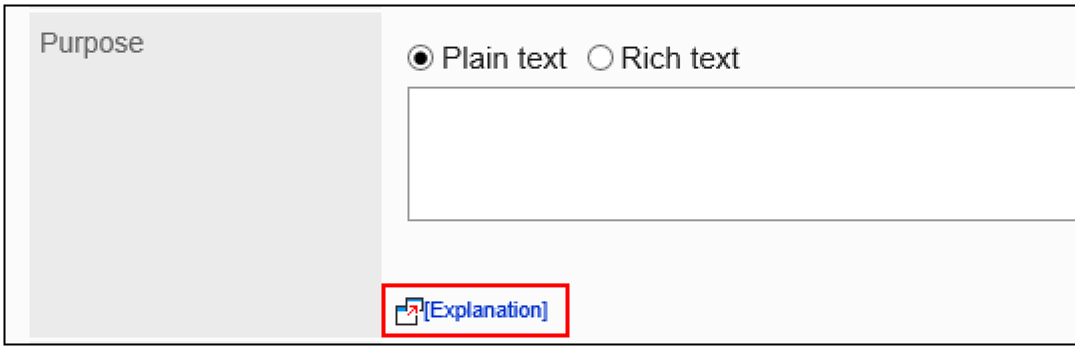
String (one line) is an entry for text in one line. You cannot enter line breaks in it.



The setting fields are as follows:



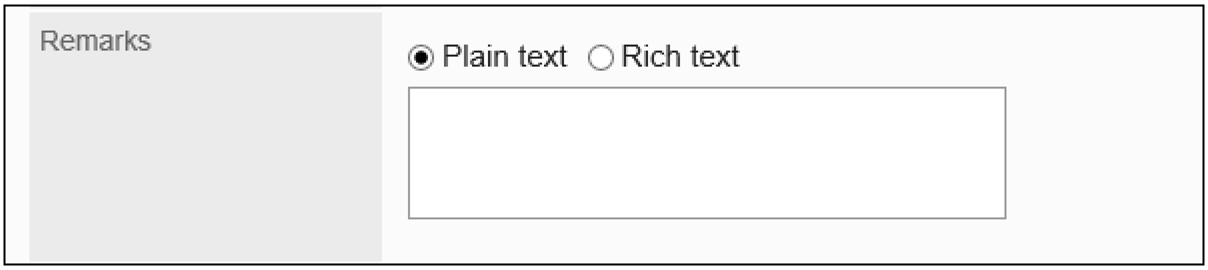
Item	Description
Item name	Enter an item name.
Input width	Enter the number of characters in single-byte. The number in this field indicates the approximate number of characters. The maximum nu can be entered in one line varies depending on the Web browser and characters you enter.
Maximum number of characters	Enter the maximum number of characters that can be entered. There is no distinction betwe characters and single-byte characters.
Limits	You can limit the characters to be entered in double-byte or single-byte only.
Default value:	Set the default value to one of the following: • Direct input: Enter characters. • User information: Select from the following:

Item	Description
	◦ User:ID A user ID for Garoon. ◦ User:Name ◦ User:Login name ◦ User:Pronunciation ◦ User:E-Mail ◦ User:Contact ◦ User:URL ◦ User:Notes ◦ User:Position ◦ User:(Item name of a custom item) Only displayed when the custom items(92Page) are configured. •
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che 
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

String (Multiple Lines)

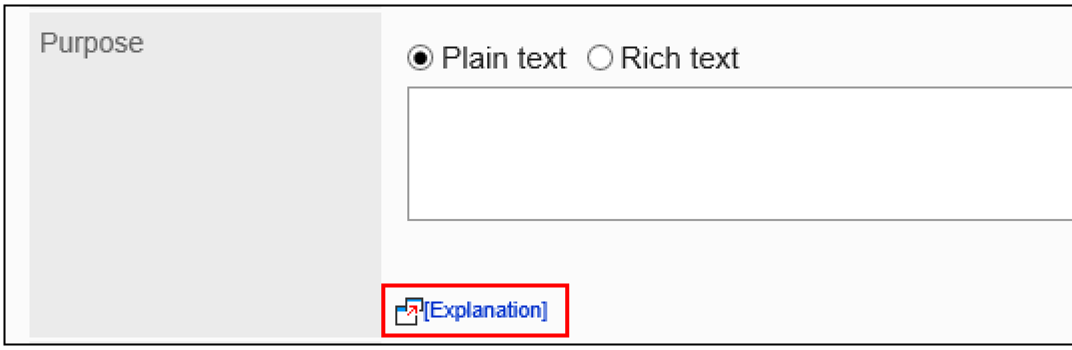
String (multiple lines) is an entry for a long sentence in multiple lines.

You can enter line breaks in it.



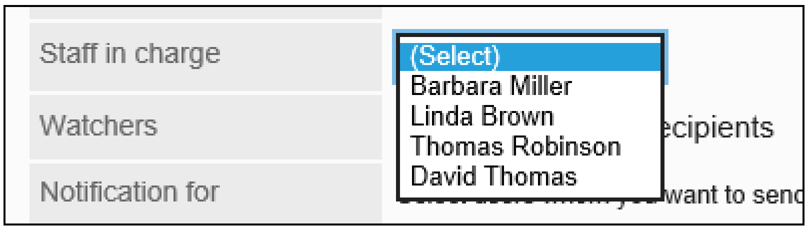
The setting fields are as follows:

Item	Description
Item name	Enter an item name.
Size	Specify the number of digits (width) and rows (height) of the input field. The number of characters per line and the number of lines per field are approximate values number of characters can be entered in one line and the maximum number of lines per filed the Web browser and the character you are using.
Default value:	You can preset a text to be displayed.

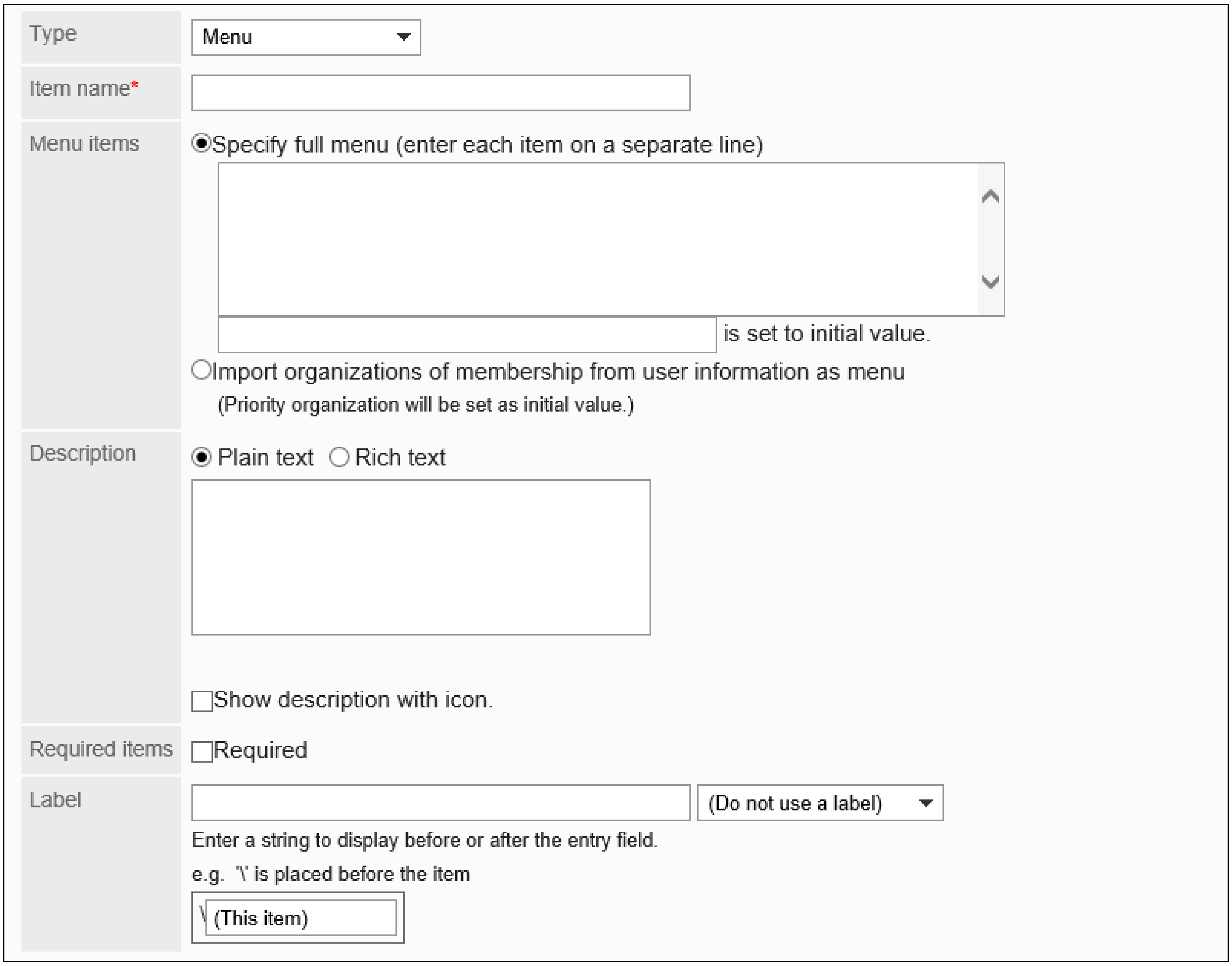
Item	Description
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che 
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

Menu

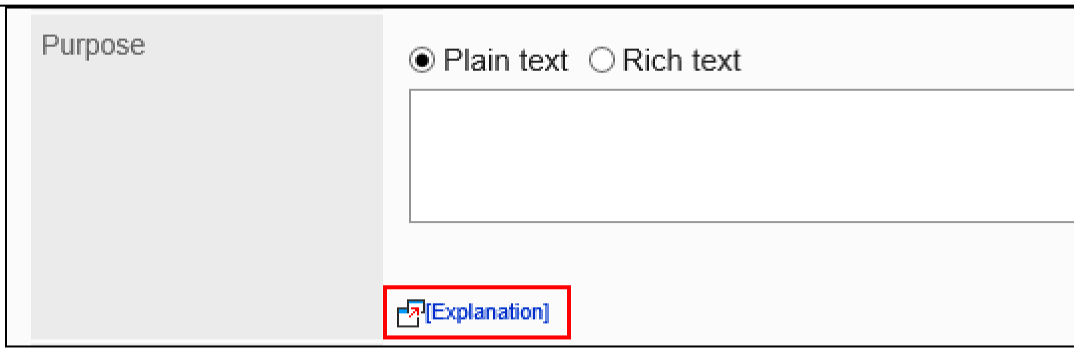
Menus are items displayed in a drop-down list.



The setting fields are as follows:



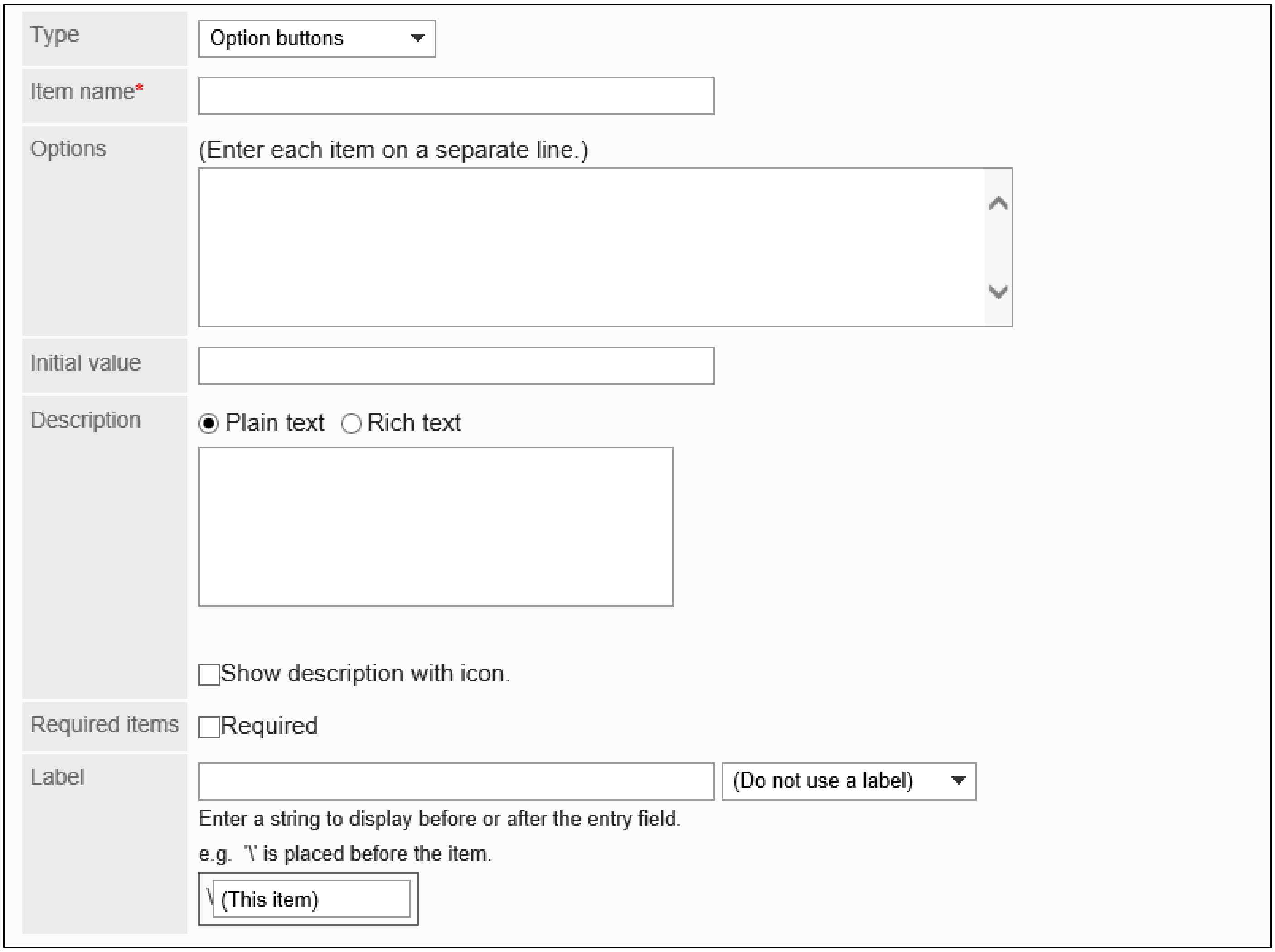
Item	Description
Item name	Enter an item name.
Menu item	For a menu item, you can set one of the following: • Direct input: Enter one item per line. You can set the default value. • Organization: When you create a report, the organization that the user belongs to is loaded. You can value for this field.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che

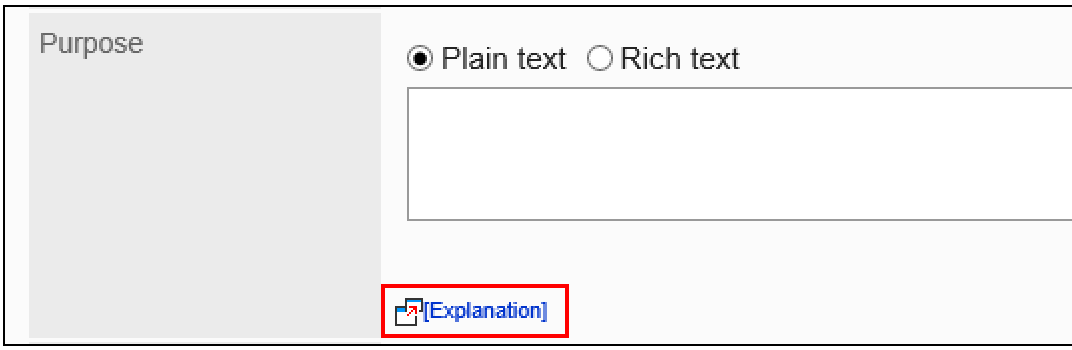
Item	Description
	
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

Radio Button

Radio buttons are items that display strings as choices in radio button format.

The setting fields are as follows:



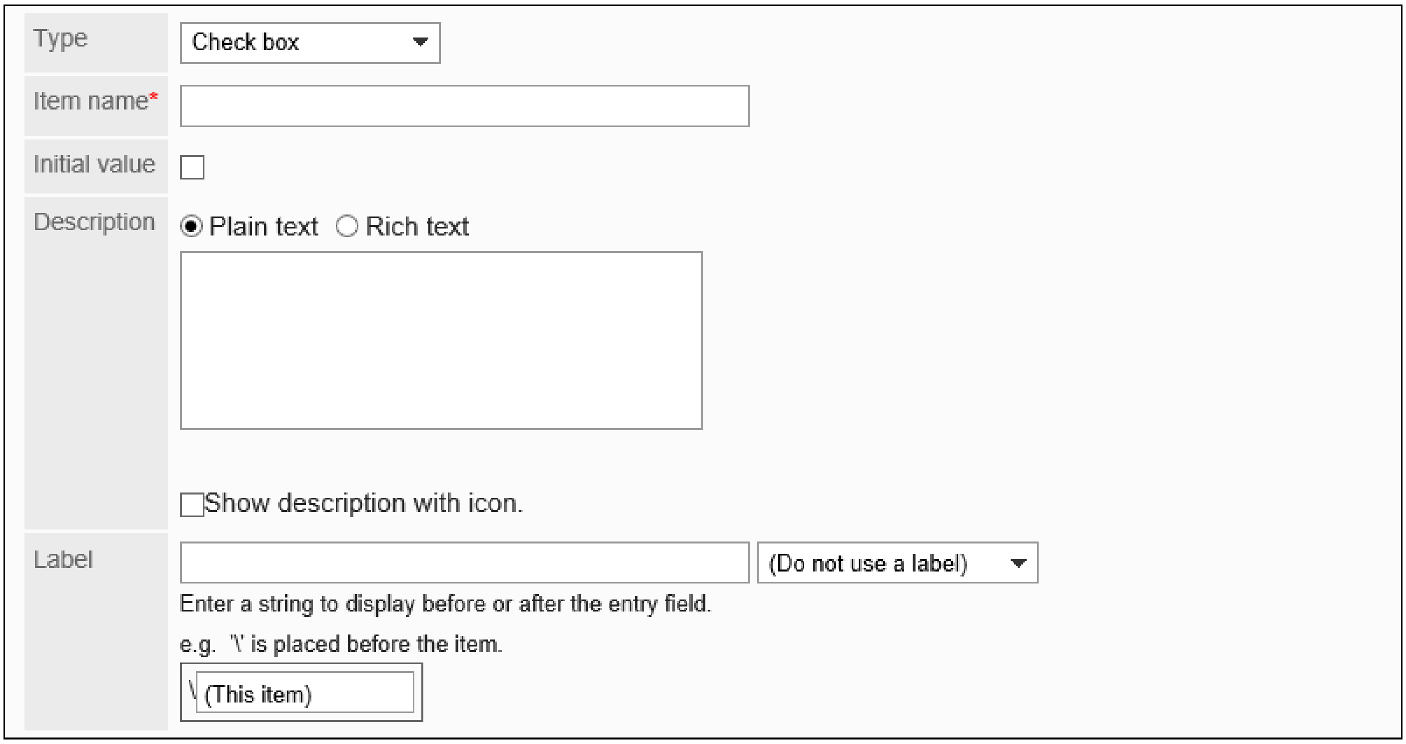
Item	Description
Item name	Enter an item name.
Radio item	Enter one item per line.
Default value:	You can set a pre-selected menu.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che 

Item	Description
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

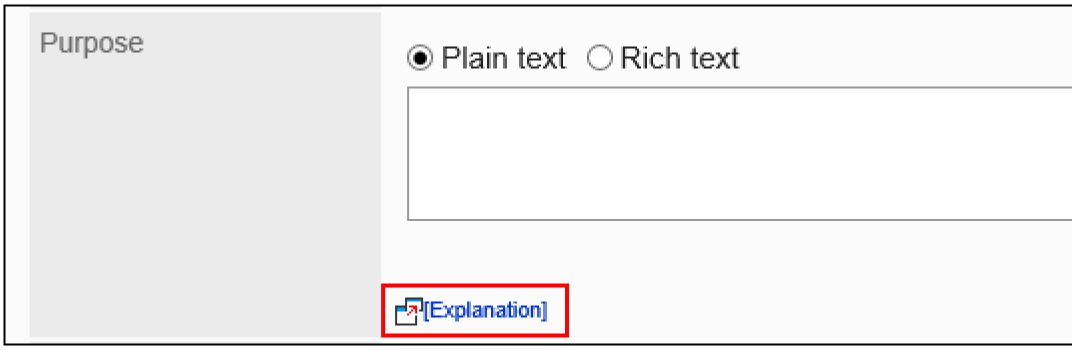
Check Box

Check boxes are items that display item names to set as selections in check box format.

The setting fields are as follows:



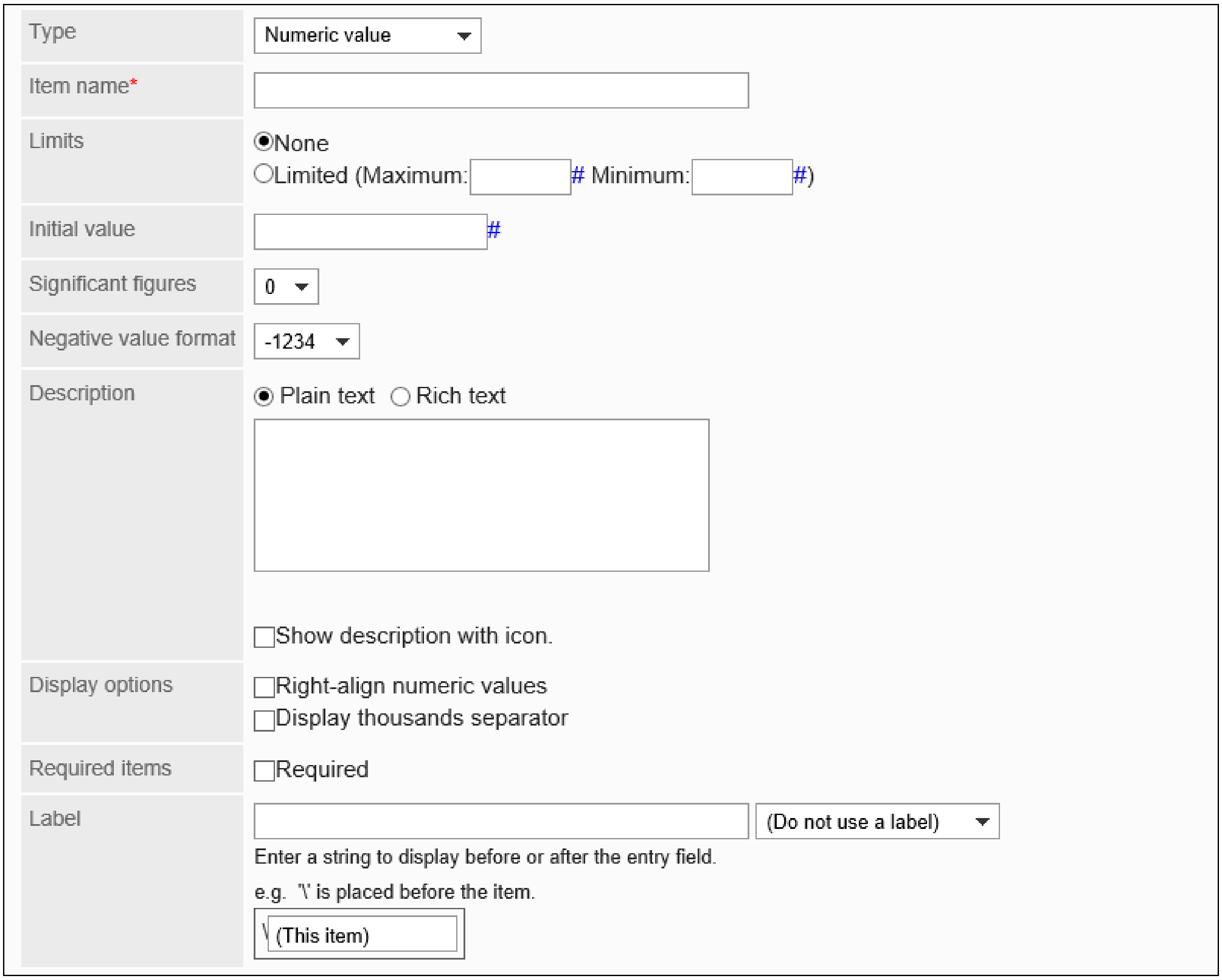
Item	Description
Item name	Enter an item name.
Default value:	When you select "Default value", the check box on the user screen appears selected.

Item	Description
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che 
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

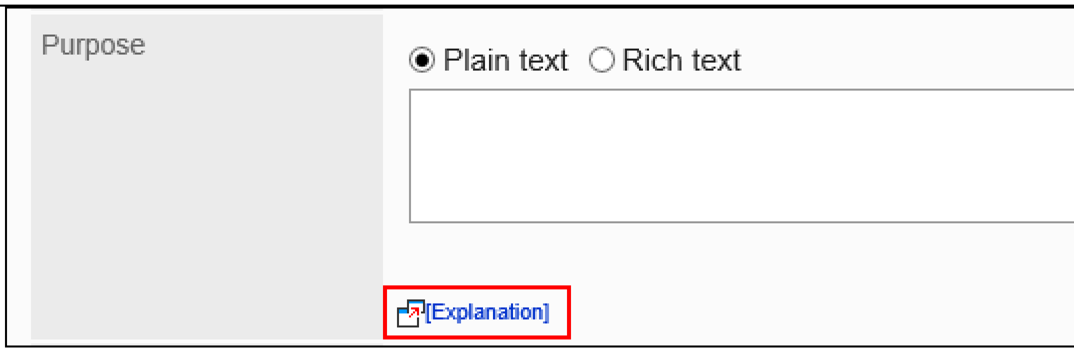
Number

Numbers are items to enter numbers.

The setting fields are as follows:



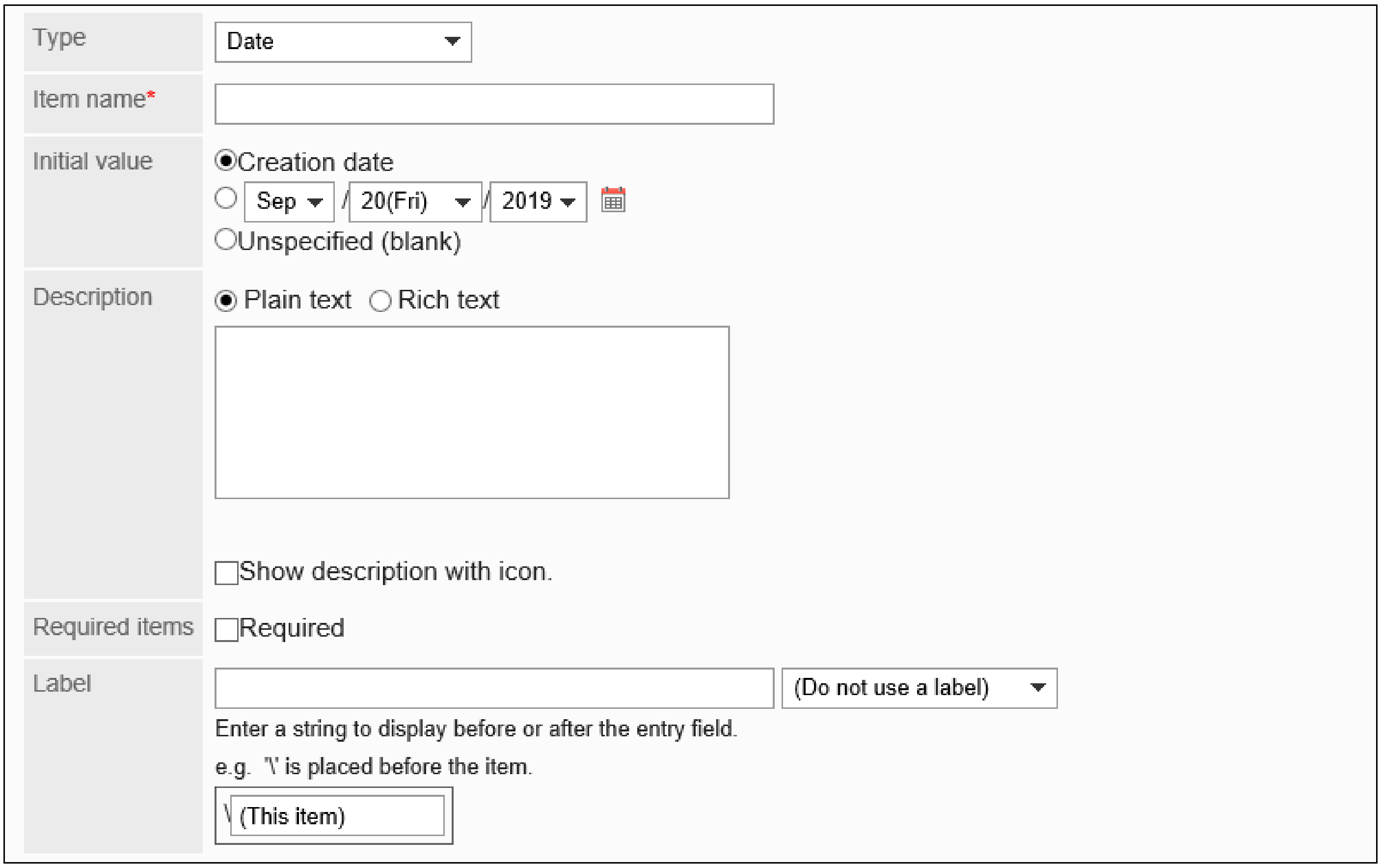
Item	Description
Item name	Enter an item name.
Limitation on input	If you set limitations to inputs, select "Limited" and set the maximum value and the minimur
Default value:	You can preset a number to be displayed.
Number of decimal places	You can specify decimal digits allowed from 0 to 10 digits.
The way to show negative numbers	Select the way to show negative numbers from the following: • -1234 • ▲1234 • △1234
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che

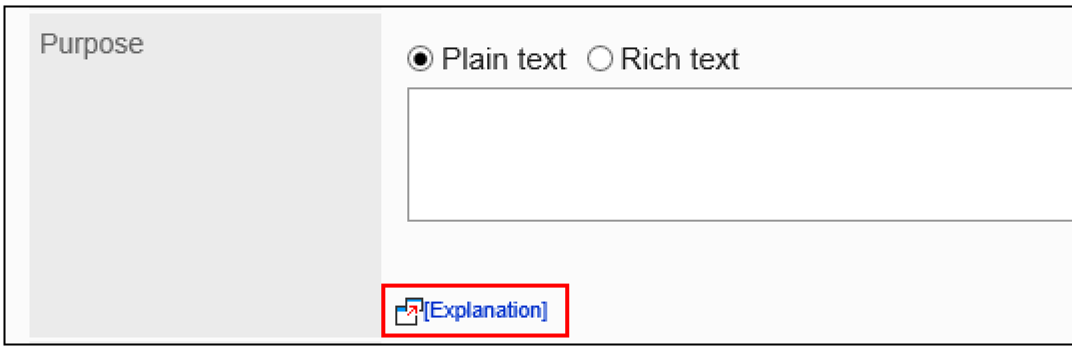
Item	Description
	
Format	You can select the following display methods: • Right-aligned • Use thousands separator
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

Date

Dates are items to specify dates in date calendars.

The setting fields are as follows:

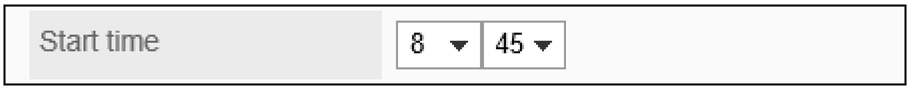


Item	Description
Item name	Enter an item name.
Default value:	Set one of the following as a default value: • Request date and time: The report creation date is used. • Specific date • Do not set: Blank field is displayed.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che 

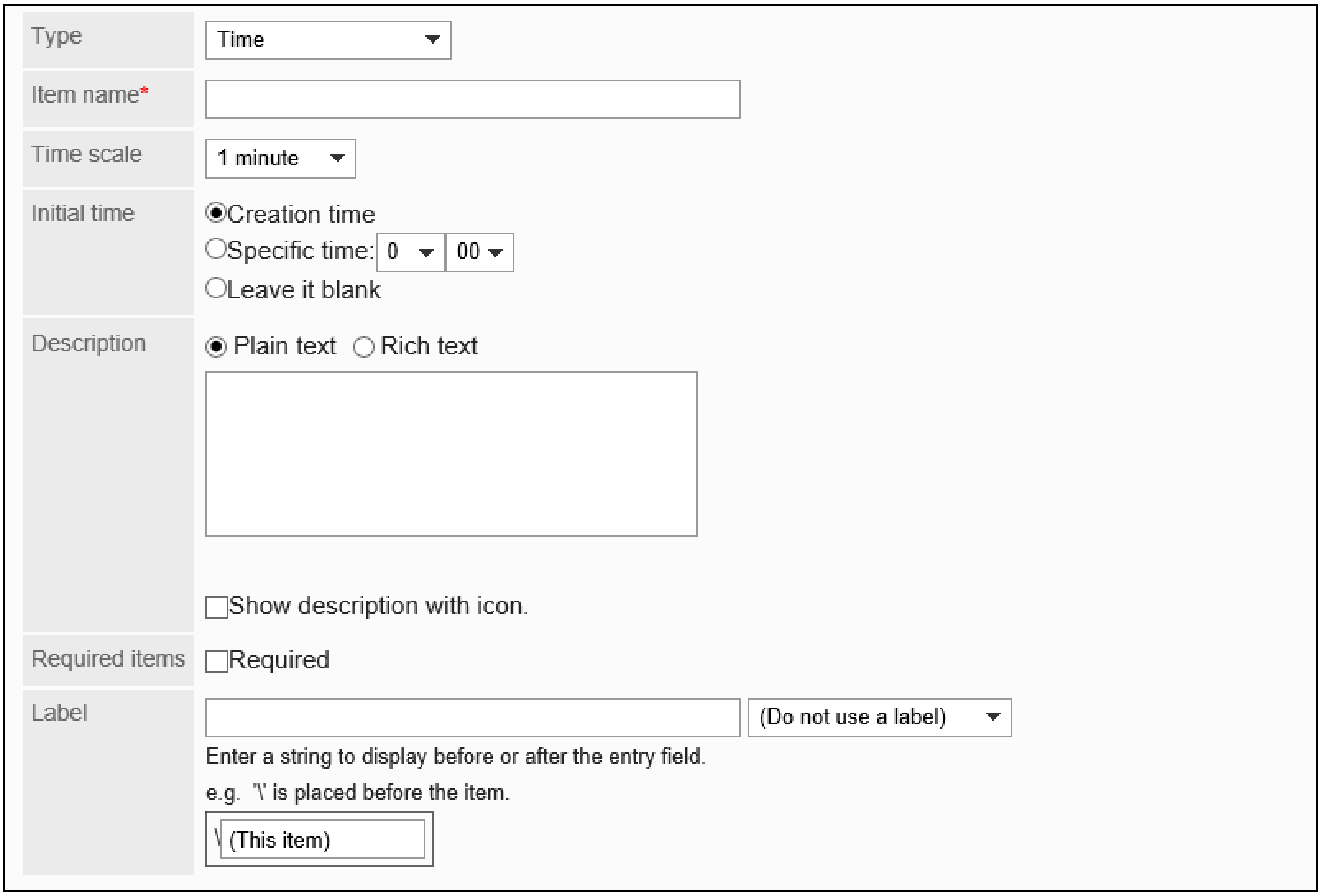
Item	Description
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

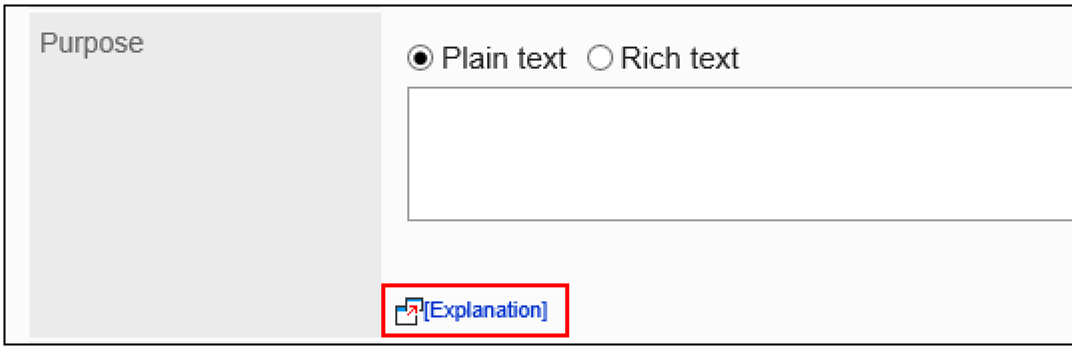
Time

Time is used to specify a time.



The setting fields are as follows:

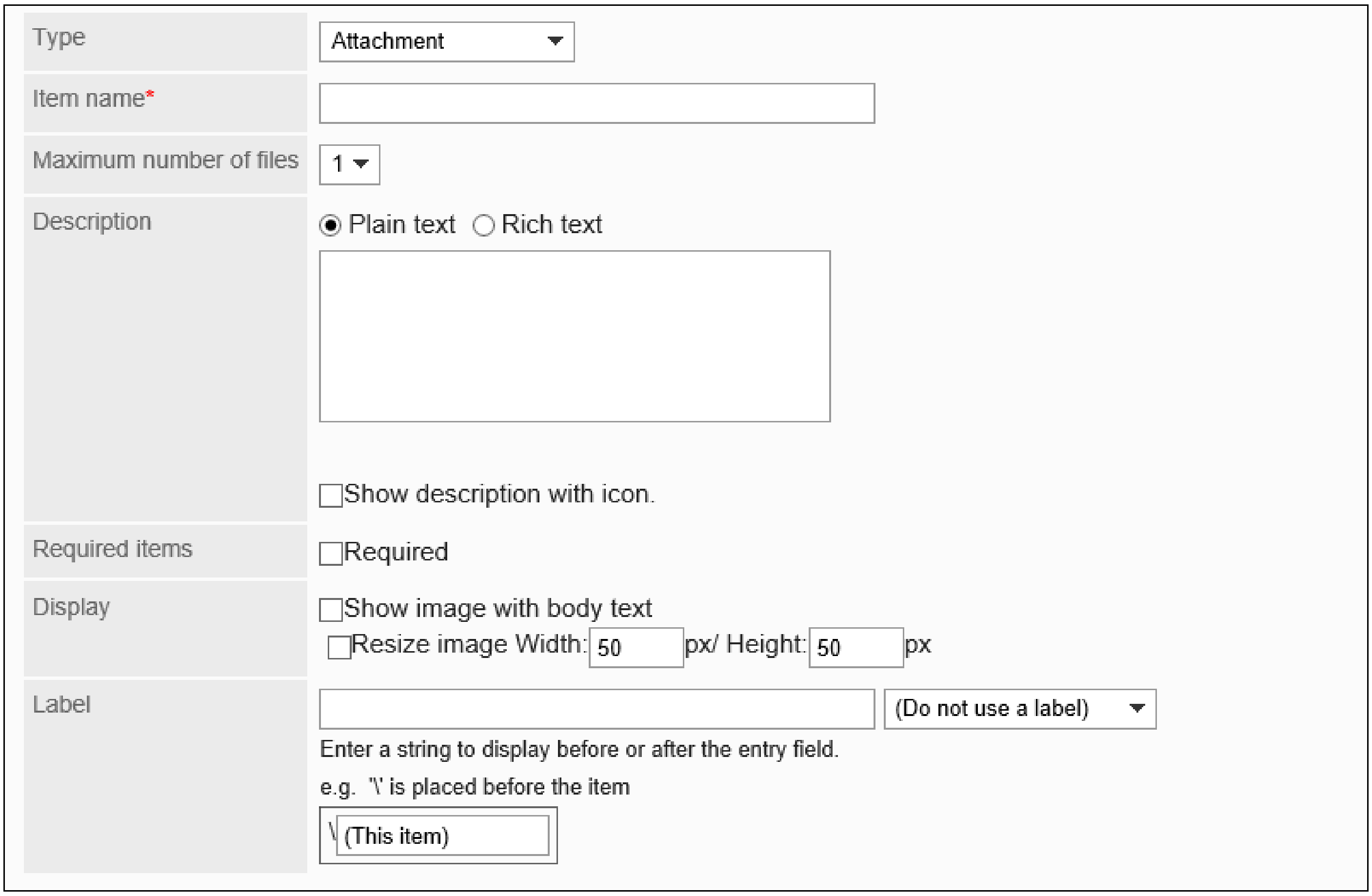


Item	Description
Item name	Enter an item name.
Unit of time	Select a unit of time from the following: • 1 minute • 5 minutes • 10 minutes • 15 minutes • 30 minutes
Default value:	Set one of the following as a default value: • Request date and time: The report creation time is set. • Specific time • Do not set (blank): Blank field is displayed.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the "show description with icon" che 
Required Field	Set whether to make the field mandatory.
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

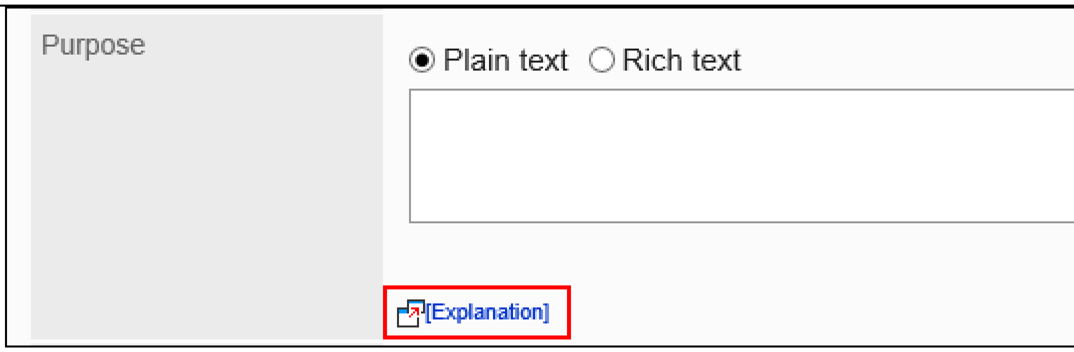
Attachment

Attachments are items to attach files to reports.

The setting fields are as follows:



Item	Description
Item name	Enter an item name.
Maximum number of files	Set the maximum number of files that can be attached. You can set up to 5.
Description	Enter a description of the item. You can use Rich Text Formatting. To display the description on a separate screen, select the show as icon check box.

Item	Description
	
Required Field	Set whether to make the field mandatory.
Format	If you select the check box to show image with body, images are displayed with the body. The images are scaled down to the specified size (in pixels).
Characters before or after the input field	Added text can be displayed before or after the input field. Enter a string to set the position to display. 

2.14.4.3. Copying Items

Copy items from an existing report form to add new items.
When you create similar items to existing ones, copying them helps you to save time.
You can copy and create items only in a same report form.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

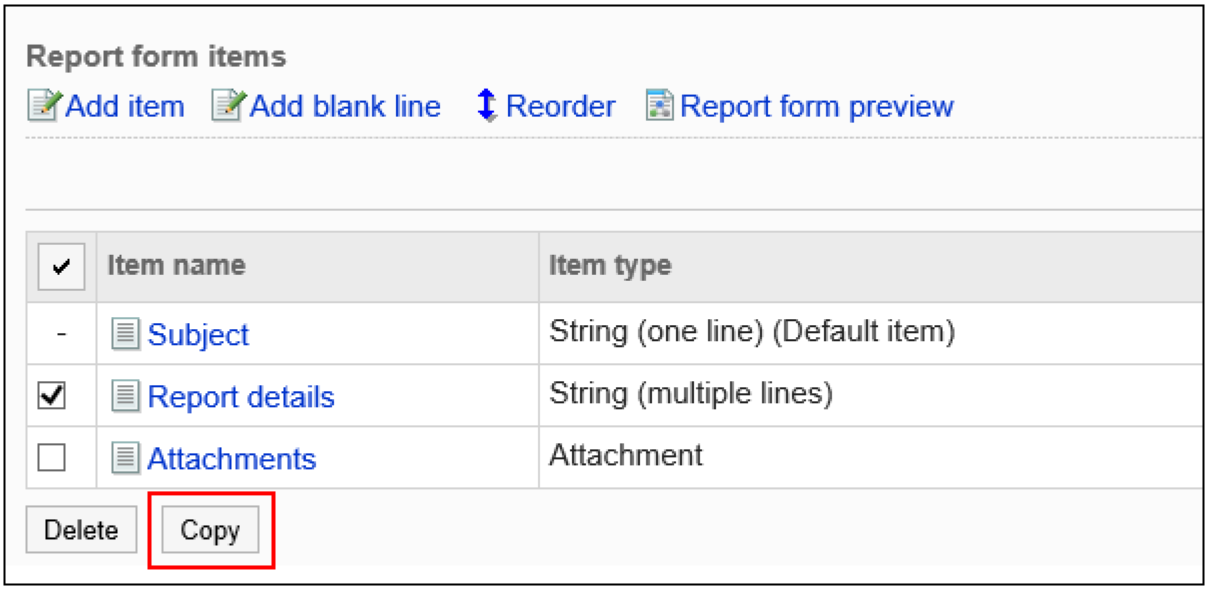
5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click the report form name of the report form from which to copy items.**

7. **In the report form list on the screen for request form details, select the check boxes of the items to copy, and click "Copy".**

The copied items are added to the bottom of the item list in the report form.

The initial value of the item name is "copy of (original item name)".



8. **You can change the settings and display order of the item as needed.**

For details, refer to the following page:

[Changing Items(1554Page)]

[Reordering Items and Empty Lines(1555Page)]

9. **On the preview screen, check the displayed items.**

For details, refer to Previewing Report Forms(1559Page).

2.14.4.4. Adding Empty Lines

Add empty lines to report forms to better view.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

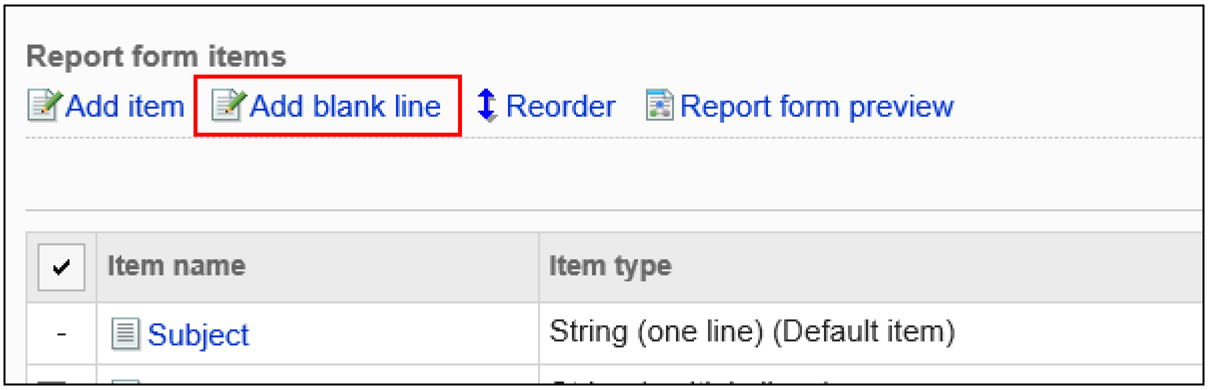
3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click the report form name of the report form to add lines.**

7. **On the screen for report form details, click to add lines in the report form list.**



8. **Click "Yes" on the add empty lines screen.**

   Empty lines are displayed at the bottom of the report form list.
   You can change the order to show the empty lines as needed.
   For details, refer to Reordering Items and Empty Lines(1555Page).

9. **On the preview screen, check the displayed items.**

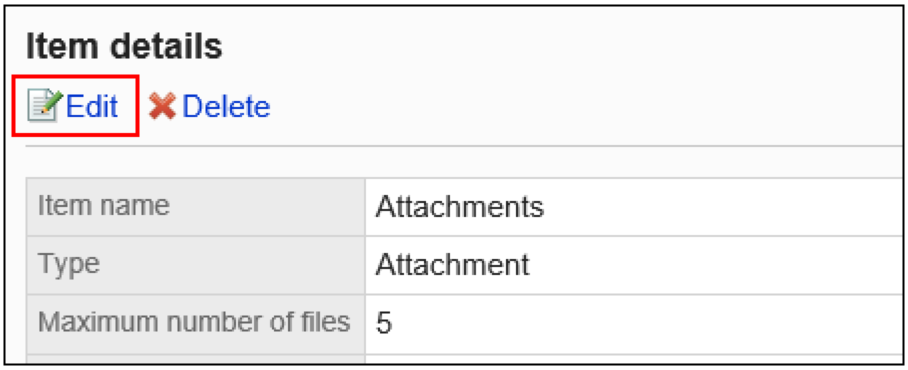
   For details, refer to Previewing Report Forms(1559Page).

2.14.4.5. Changing Items

Change settings of items in report forms.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click the report form name of the report form to change items.**
7. **In the report form list on the screen for report form details, click the item name of the item to change.**
8. **On the item details screen, click "Save".**



9. **On the screen to change items, set the required items.**

   For details, refer to Item Types(1535Page).

10. **Confirm your settings and click "Save".**
11. **On the preview screen, check the displayed items.**

    For details, refer to Previewing Report Forms(1559Page).

2.14.4.6. Reordering Items and Empty Lines

Reorder items and empty lines in report forms .

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

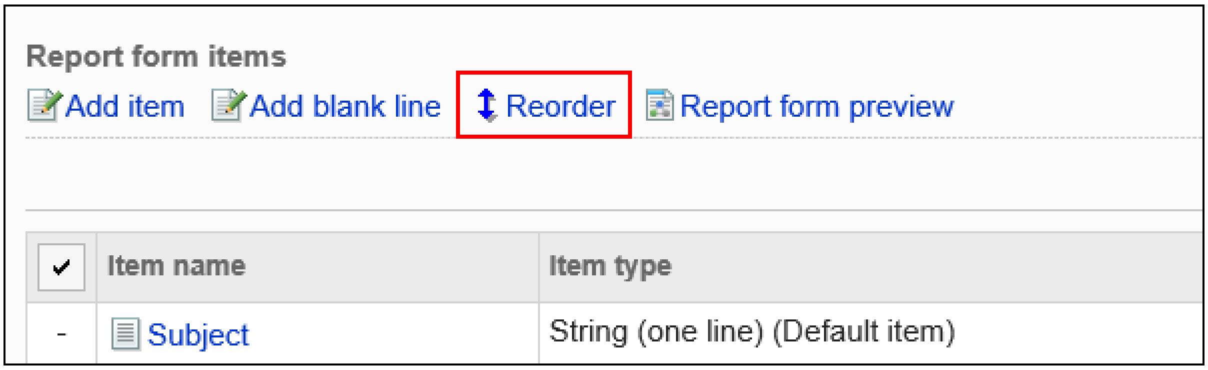
3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

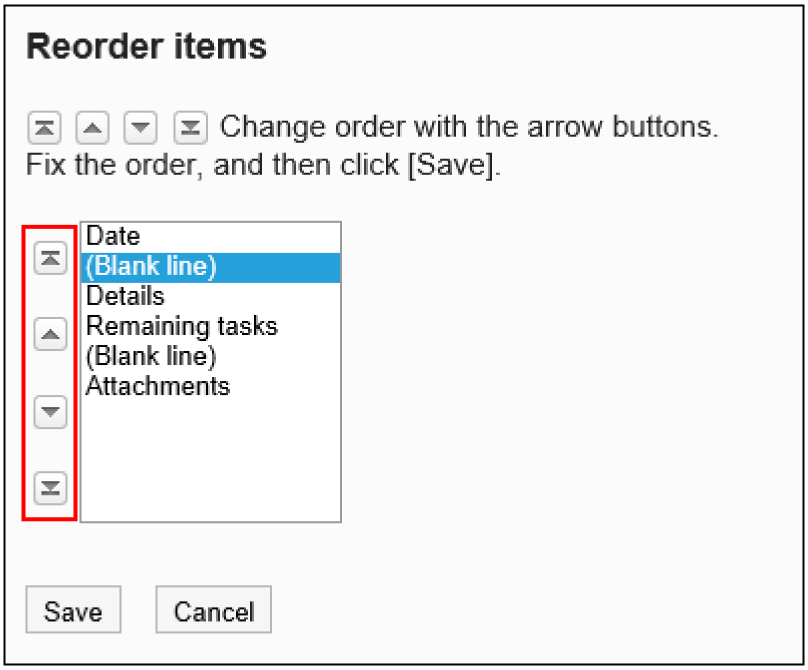
5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click the report form name of the report form to change the order of items and empty lines.**

7. **On the screen for report form details, click to reorder items and lines in the report form list.**



8. **On the screen to reorder items, change the order to display the items and empty lines.**



9. Confirm your settings and click "Save".

10. On the preview screen, check the displayed items.

For details, refer to Previewing Report Forms(1559Page).

2.14.4.7. Deleting Items and Empty Lines

Delete items and empty lines in report forms.

You cannot delete "Subject".

Caution

- Deleted items cannot be restored.
  The items and their data are also deleted from the reports that are already created.

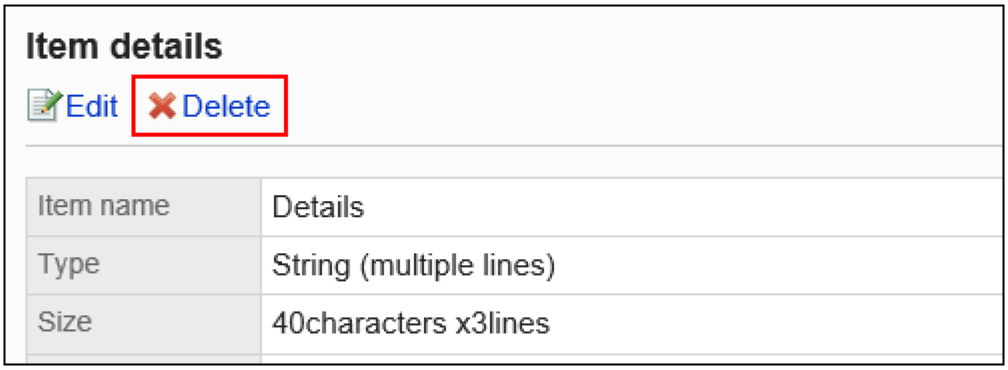
Deleting Items One by One

Delete Items one at a time.

To delete empty lines, refer to Deleting Multiple Items and Empty Lines in Bulk(1557Page).

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click the report form name of the report form to delete items.**
7. **In the report form list on the screen for report form details, click the item name of the item to delete.**
8. **On the item details screen, click "Delete".**



9. **Click "Yes" on the screen to delete items.**
10. **On the preview screen, check the displayed items.**

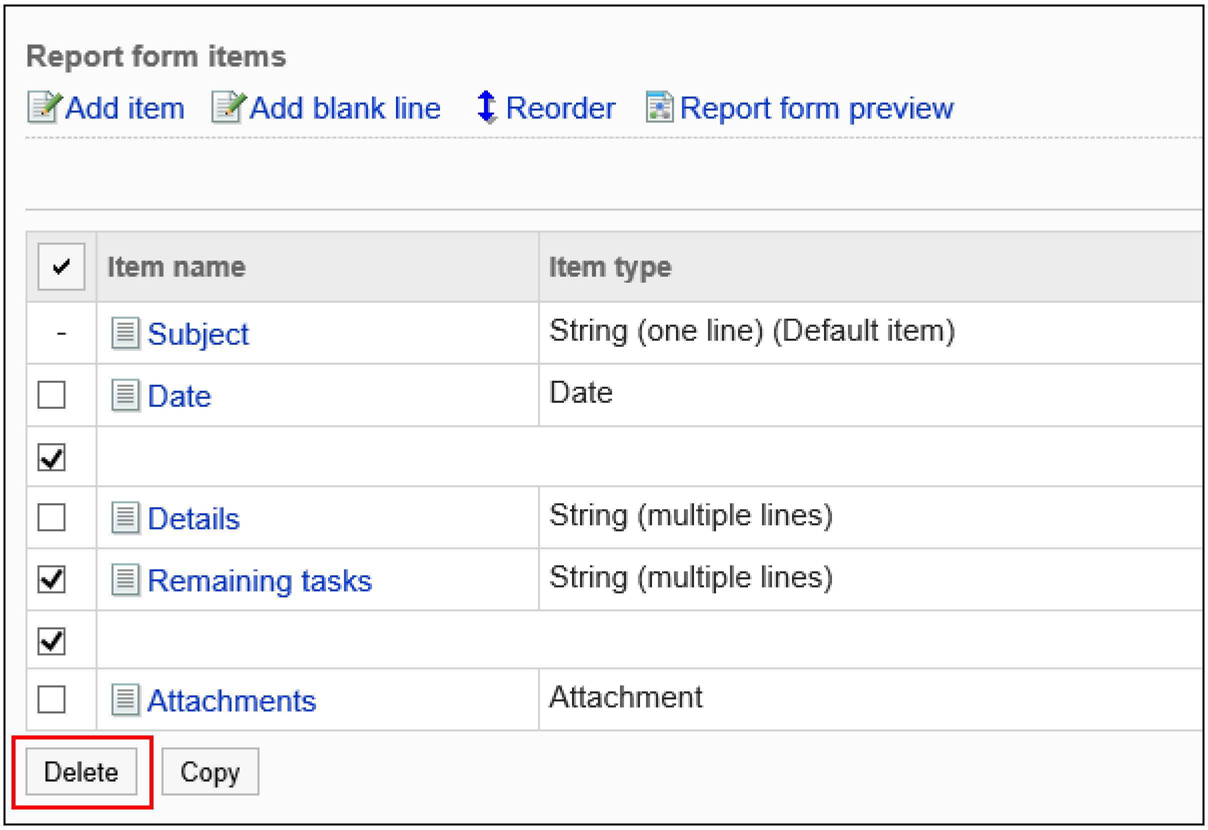
    For details, refer to Previewing Report Forms(1559Page).

Deleting Multiple Items and Empty Lines in Bulk

Select multiple items or empty rows to delete them at once.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click the report form name of the report form to delete items and empty lines.**
7. **In the report form list on the screen for report form details, select the check boxes of the fields and empty lines to delete, and then click "Delete".**



8. **Click "Yes" on the Delete all items screen.**
9. **On the preview screen, check the displayed items.**

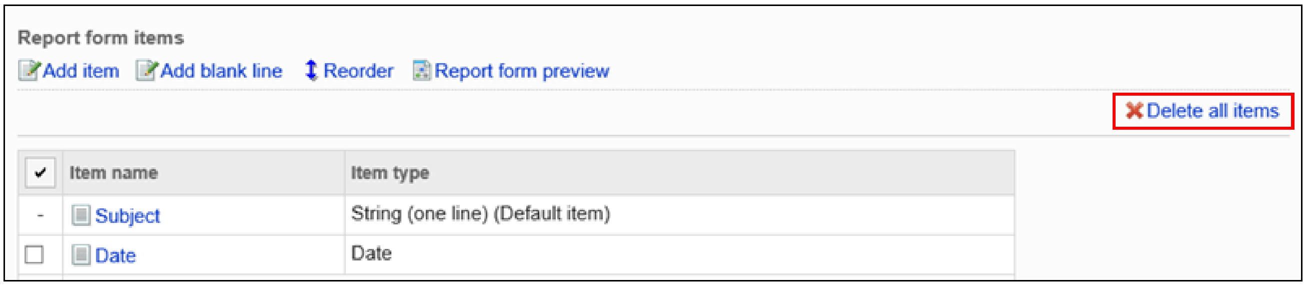
   For details, refer to Previewing Report Forms(1559Page).

Deleting All Items and Empty Lines in a Report Form

Delete all items and empty lines in a report form.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the report form list.**
6. **On the screen for report form list, select a category, and then click the report form name of the report form to delete items and empty lines.**
7. **On the screen for report form details, click the item to delete all items in the report form in the report form list.**



8. **Click "Yes" on the screen to delete all items.**

2.14.4.8. Previewing Report Forms

On the preview screen, check the appearance of a report form name and items.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**

3. **Select "Application settings" tab.**

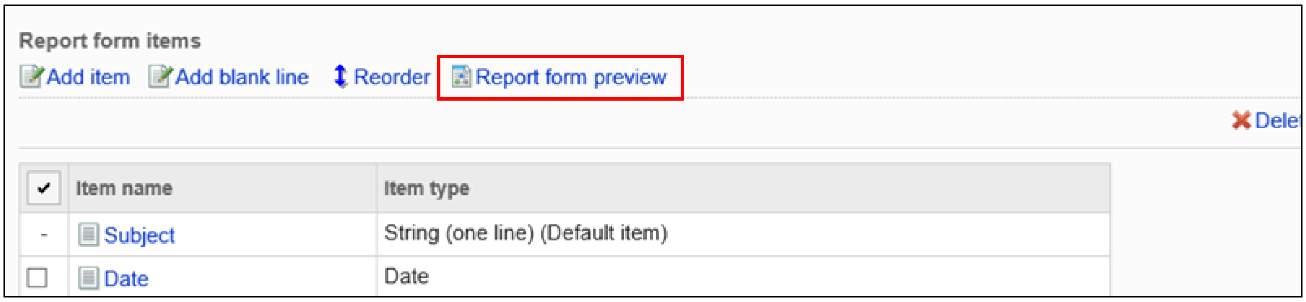
4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click the report form name of the report form to check the appearance.**

7. **On the screen for report form details, click the item to preview the report form in the report form list.**

The preview screen opens in a new tab or window.



8. **On the preview report form screen, check the appearance of the report form name or items.**

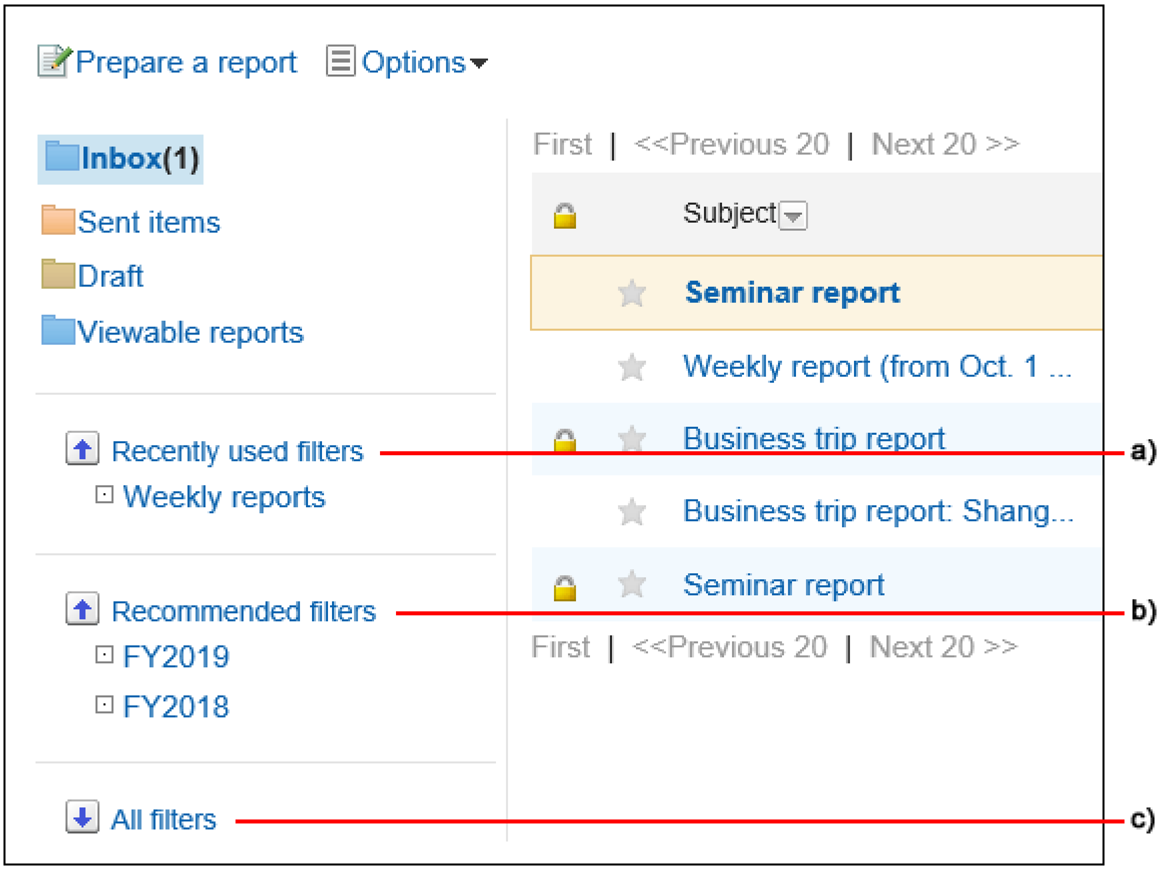
You cannot use buttons on the preview screen such as checking contents or "Cancel".

2.14.5. Setting up Report Filters

You can set menus (filters) to filter reports meeting specific conditions for each category.

For example, you can show reports by author, or show only reports created after a specific date.

The filters appear on the MultiReport screen of users.



a): Recently selected filters

The filters the user used previously. Up to 5 filters are displayed.

b): Recommended filters

The filters set the user as a recommended user by the system administrator.

c): All filters

All the filters available to users.

References

- Adding Categories(1493Page)
- Adding Report Forms(1514Page)
- Adding Filters(1562Page)
- Enabling Filters(1572Page)

2.14.5.1. Adding Filters

Add filters by category.

Filters cannot be moved to other categores.

"(Root)" cannot have filters.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

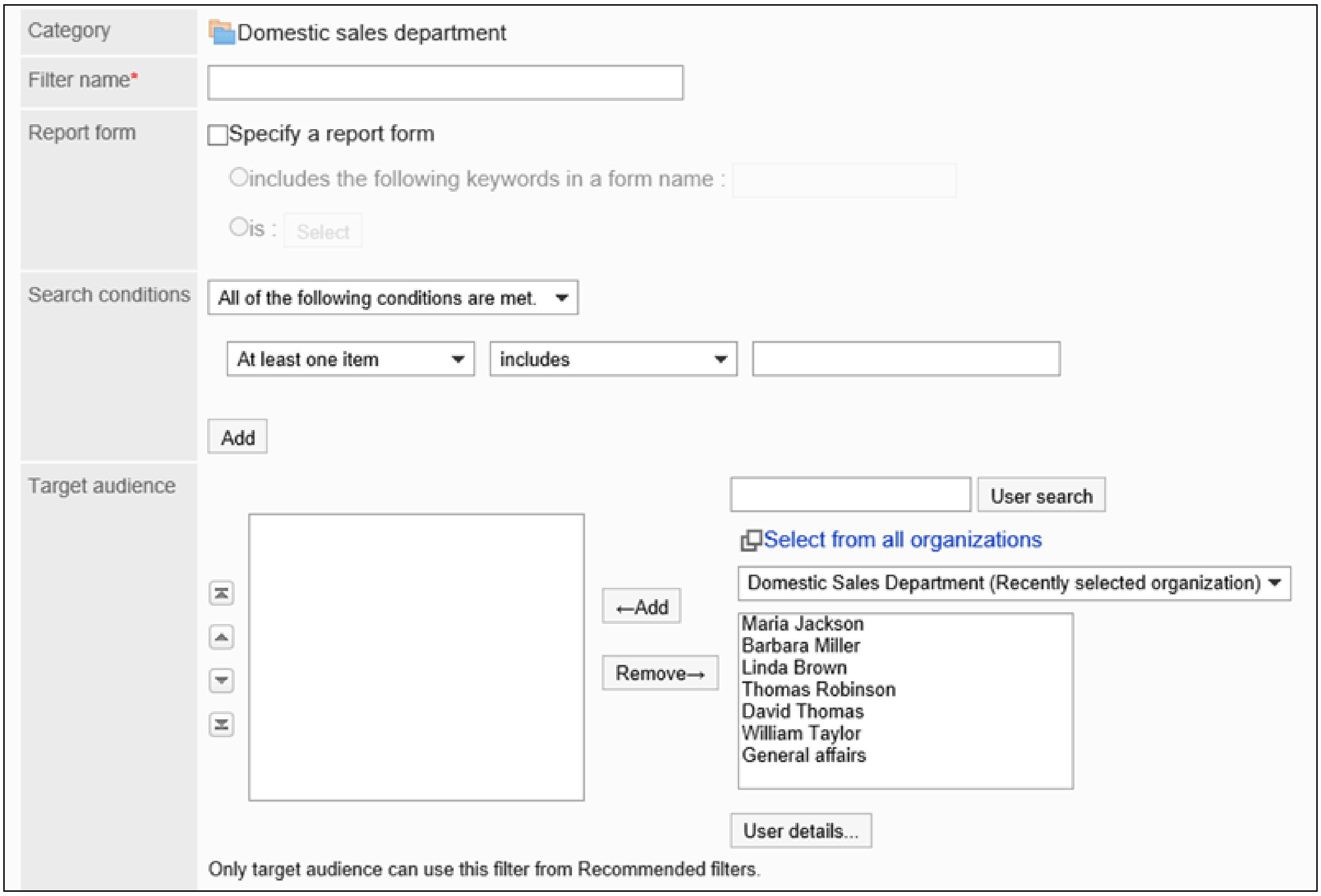
5. **Click the filter list.**

6. **On the filter list screen, select a category and click an item to add a filter.**

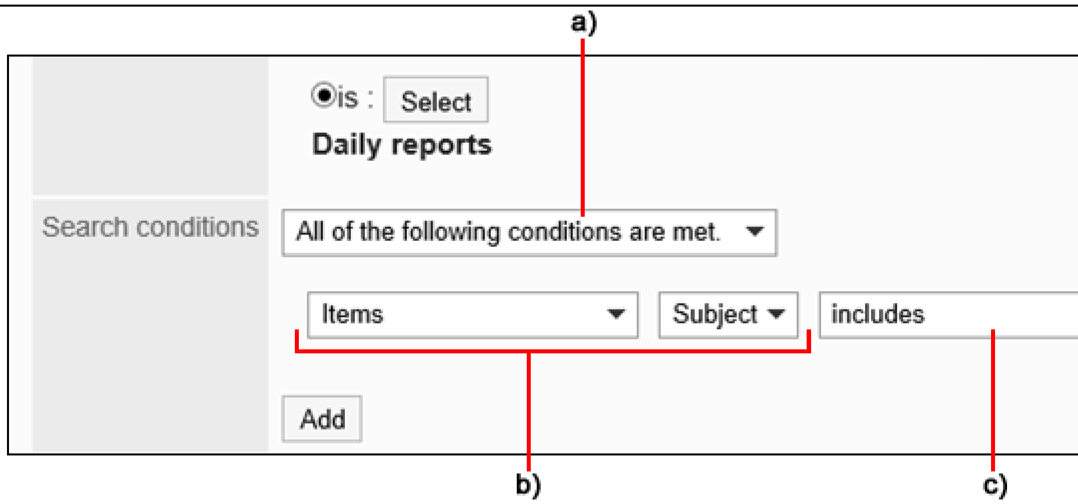
7. **On the screen to add filters, set the required items.**

8. **Confirm your settings and click "Add".**

Filter Settings



Item	Description
Filter Name	Enter the filter name.
Report Form	Set whether to specify report forms in the report filter. If you chose to specify this option, select the check box to specify report forms, and then se • The form name includes the following: Filter reports by its report form name containing the text you specify here. • Same as the following: Click "Select", then filter reports by filter forms you select on the screen to select forms
Search Conditions	Set conditions to filter reports.

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td></td><td>


a): To combine conditions
Select one of the following:

- All the following conditions are met:
Filters reports that met all the conditions specified.
- One of the following conditions is met:
Filters reports that meet one or more of the conditions specified.

b): Items
Select items to use to filter from the following:

- One of the following items:
Filters reports that contain report authors, creation dates, and report form items.
- Created by
- Created on
- Items:
If you specify a specific report form, you can select items in the report form.
- Comment

c): Conditional expression
Set a expression to use to filter. The conditional expressions that can be set differ depending on the item type.
d): Value
Enter a value to use for comparisons in conditional expressions.

You can add conditions by clicking the item to add conditions.
You can delete one condition at a time by clicking "Delete".
You can delete all conditions that have been set by clicking the item to delete all conditions.
</td></tr>
<tr><td>Recommended users</td><td>Select the user to show in the recommended filter field on the user screen.</td></tr>
</table>

2.14.5.2. Copying Filters

Copy an existing filter to create a new filter.

When you create similar filters to existing ones, copying them helps you to save time.

You can copy and create filters only in a same category.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the filter list.**
6. **On the filter list screen, select a category.**
7. **Select the check boxes of the filters to copy, and click "Copy".**

   The copied filters are added to the bottom of the filter list.

   The initial value of the filter name is "copy of (original filter name)".

8. **You can change the settings and display order of the filter as needed.**

For details, refer to the following page:

Changing Filters(1566Page)

Reordering Filters(1567Page)

Enabling Filters(1572Page)

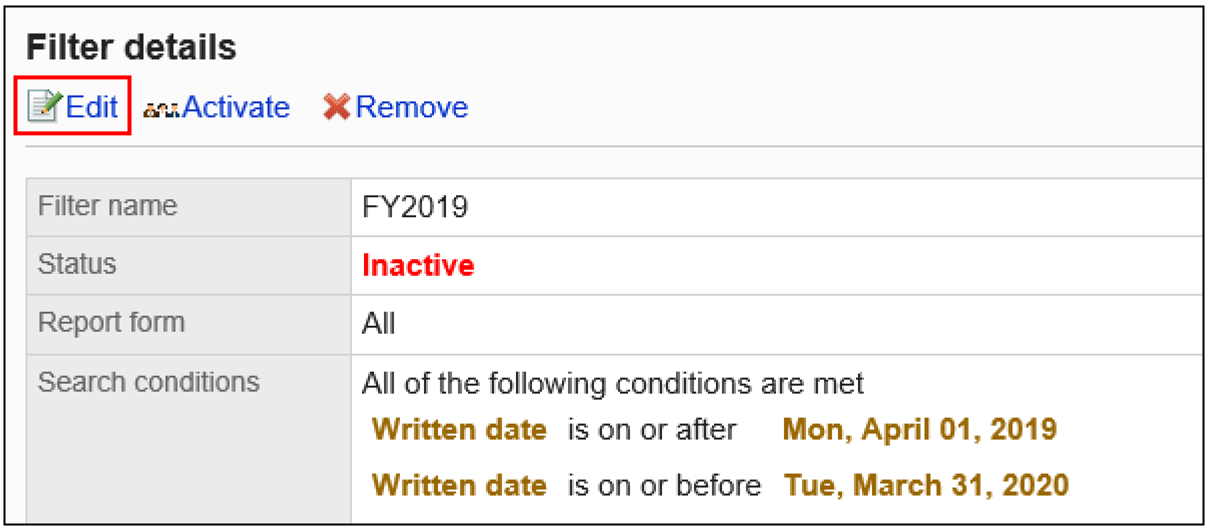
2.14.5.3. Changing Filters

Change filter settings.

To change filters, we recommend you to disable the filters(1573Page) before changing them.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the filter list.**
6. **On the filter list screen, select a category, and then click the name of the filter to edit.**
7. **On the screen for filter details, click "Save".**



8. On the screen to change filters, set the required items.

For details, refer to Filter Settings(1562Page).

9. Confirm your settings and click "Save".

2.14.5.4. Reordering Filters

Reorder filters.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

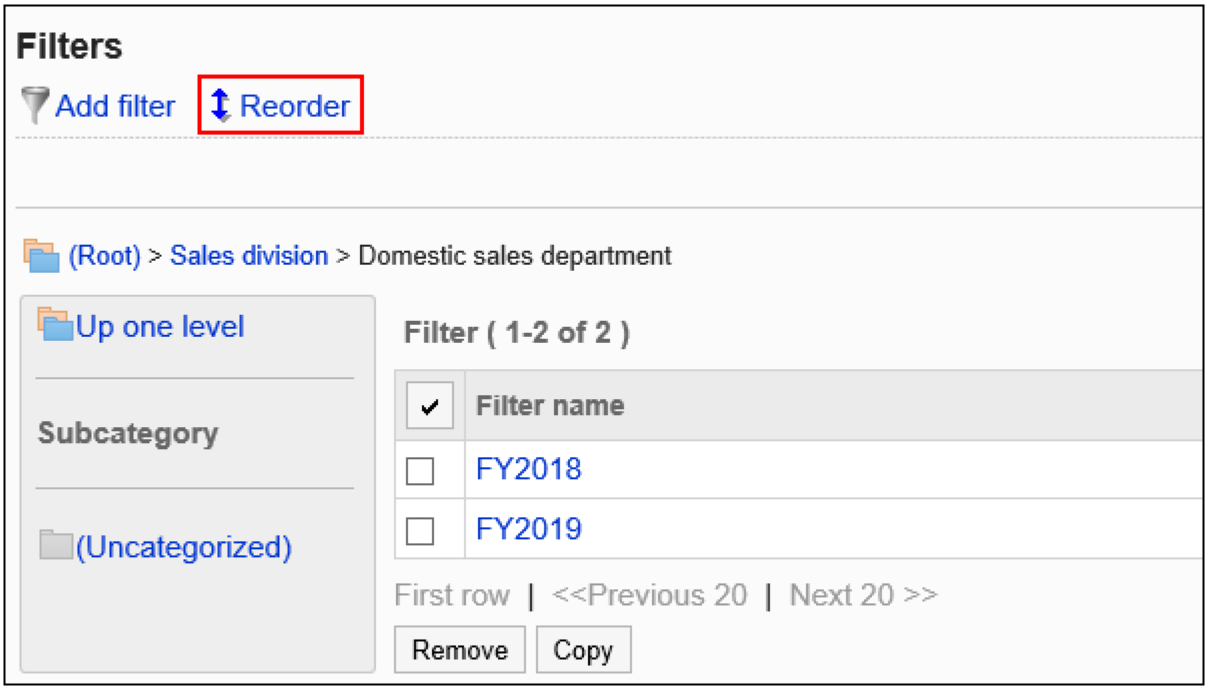
2. Click "System settings".

3. Select "Application settings" tab.

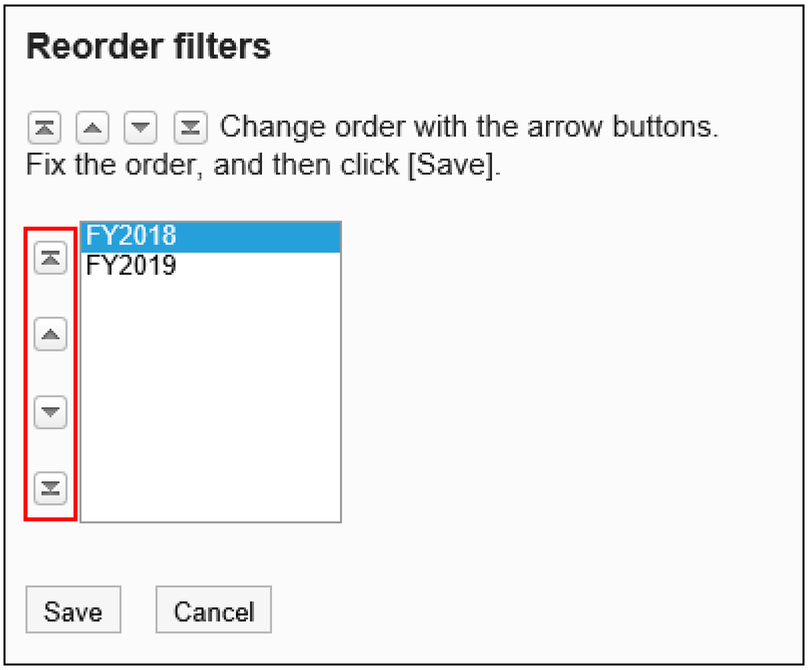
4. Click "MultiReport".

5. Click the filter list.

6. On the filter list screen, select a category and click an item to reorder filters.



7. **On the screen to reorder filters, change the order to display the filters.**



8. **Confirm your settings and click "Save".**

2.14.5.5. Deleting Filters

Remove filters.

Caution

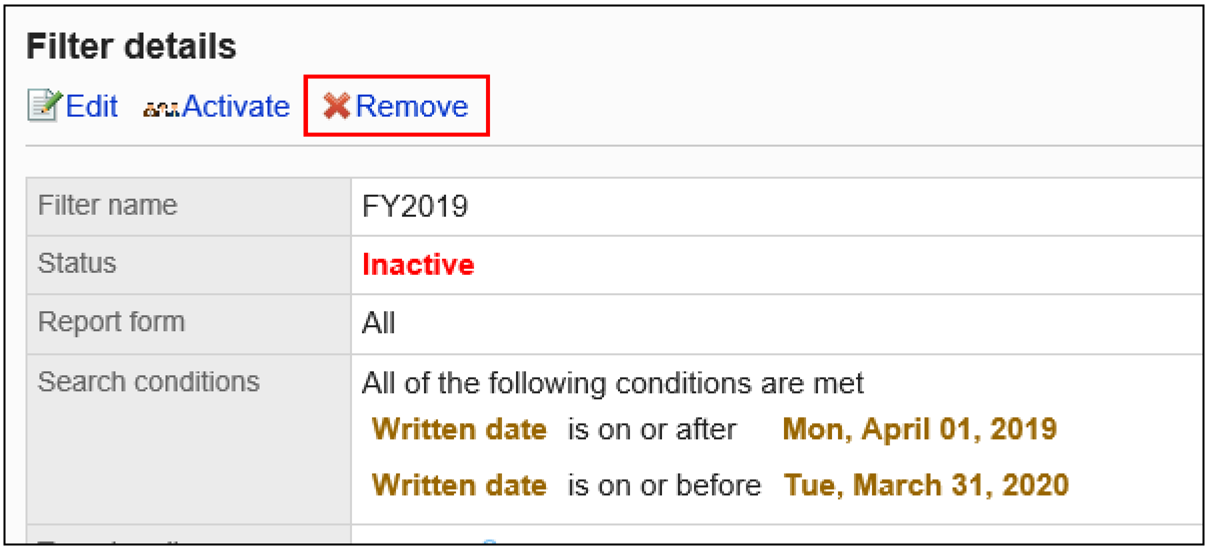
- Removed filters cannot be restored.

Deleting Filters One by One

Delete filters one at a time.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the filter list.**
6. **On the filter list screen, select a category, and then click the name of the filter to delete.**
7. **On the screen for filter details, click "Delete".**



8. Click "Yes" on the screen to delete filters.

Deleting Multiple Filters in Bulk

Select filters to delete, and delete them all together.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

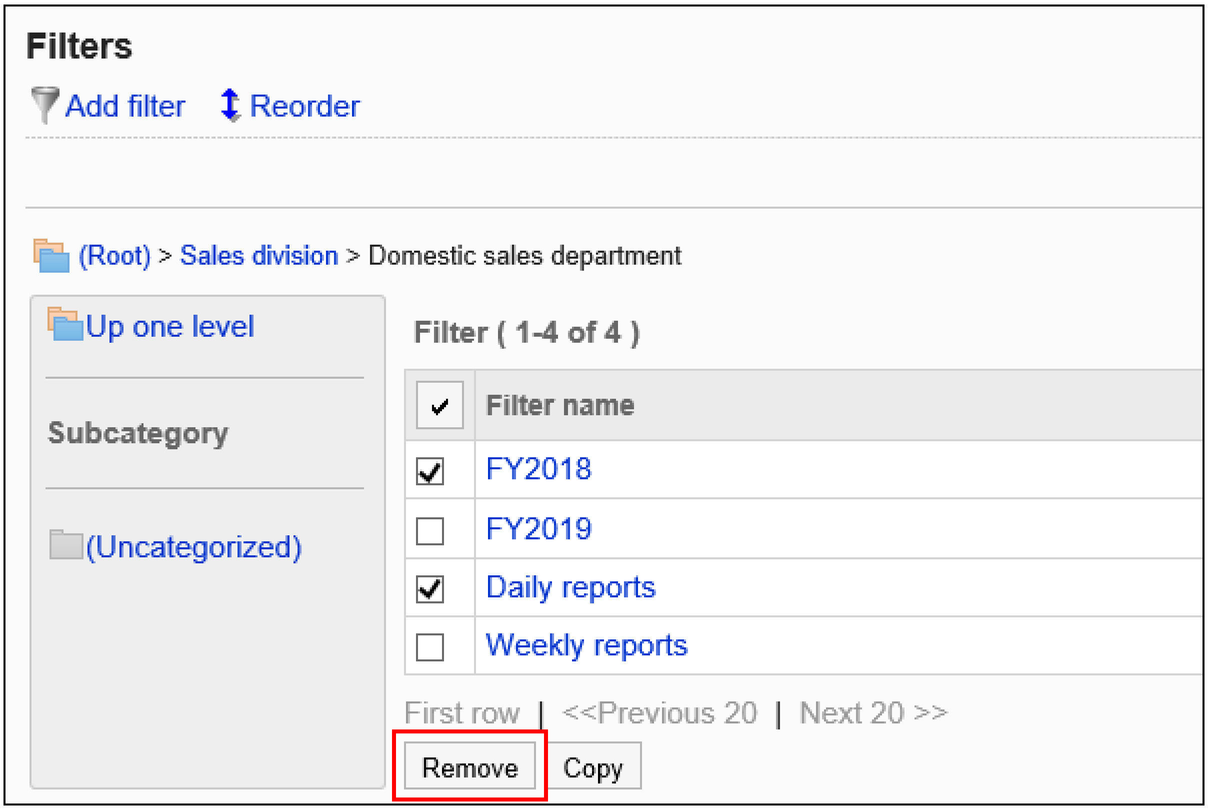
3. Select "Application settings" tab.

4. Click "MultiReport".

5. Click the filter list.

6. On the filter list screen, select a category.

7. Select the check boxes of the filters to delete, and click "Delete".



8. **Click "Yes" on the delete all filters screen.**

Deleting All Filters in a Category

Delete all filters in a category.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the filter list.**
6. **On the filter list screen, select a category, and then click the item to delete all filters in the category.**

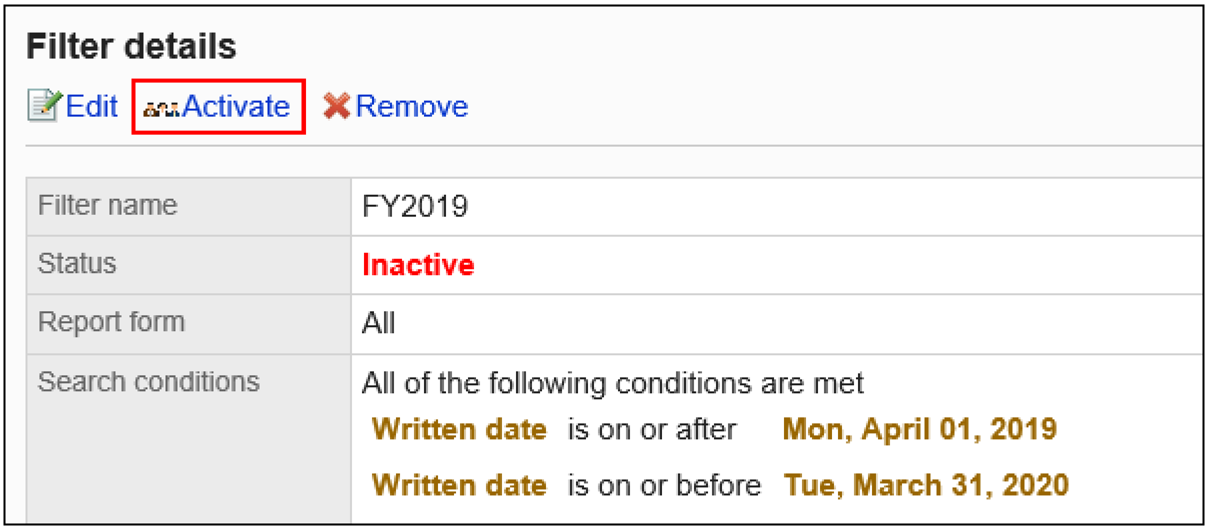
7. **Click "Yes" on the screen to delete all filters.**

2.14.5.6. Enabling Filters

Allow users to use filters.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click the filter list.**
6. **On the filter list screen, select a category, and then click the name of the filter to activate.**
7. **On the screen for filter details, click "Enable".**



8. Click "Yes" on the screen to enable filters.

Disabling Filters

Disable filters.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. Click "System settings".

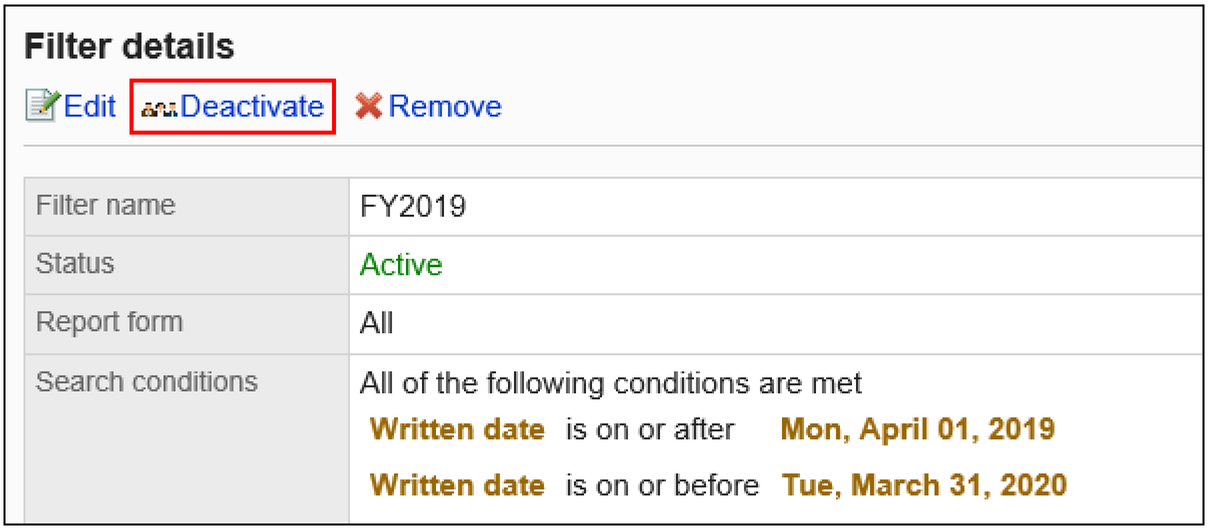
3. Select "Application settings" tab.

4. Click "MultiReport".

5. Click the filter list.

6. On the filter list screen, select a category, and then click the name of the filter to deactivate.

7. On the screen for filter details, click "Disable".



8. Click "Yes" on the screen to enable filters.

2.14.6. Managing Reports

System administrators and operational administrators can change and delete reports created by users.

References

- Change reports(1574Page)
- Changing Notification Recipients for Reports(1576Page)
- Printing Reports(1579Page)
- Delete reports(1581Page)

2.14.6.1. Changing Reports

Change contents in reports.

When you change contents of a report, the report author, attendees, and notification recipients will be notified.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category and select a report form.**

7. **Click the subject of the report to change.**

8. **On the report details screen, click "Save".**

9. **On the screen to change reports, set the required items.**

   For details, refer to Setting Items for Reports.

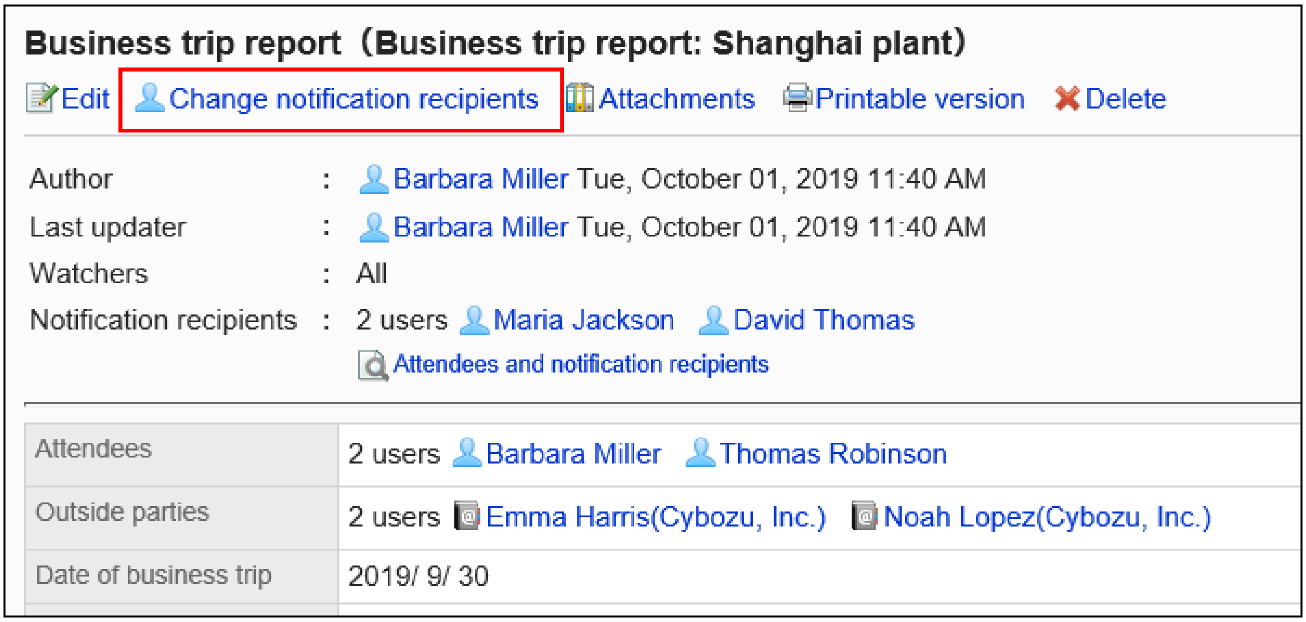
10. **Confirm your settings and click "Save".**

2.14.6.2. Changing Notification Recipients for Reports

You can change notification recipients of reports or users who can change the reports.
If you change the notification recipients of a report, users set as recipients will be notified. Authors and attendees will not be notified.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "MultiReport".**
5. **Click "Manage reports".**
6. **On "Manage reports" screen, select a category and select a report form.**
7. **Click the subject of the report to change its notification recipients.**
8. **On the report details screen, click the item to change the notification recipients.**



9. **On the screen to change notification recipients, you can change the recipients and users who can change the report.**
   - Recipients:
     Select notification recipients of the report.

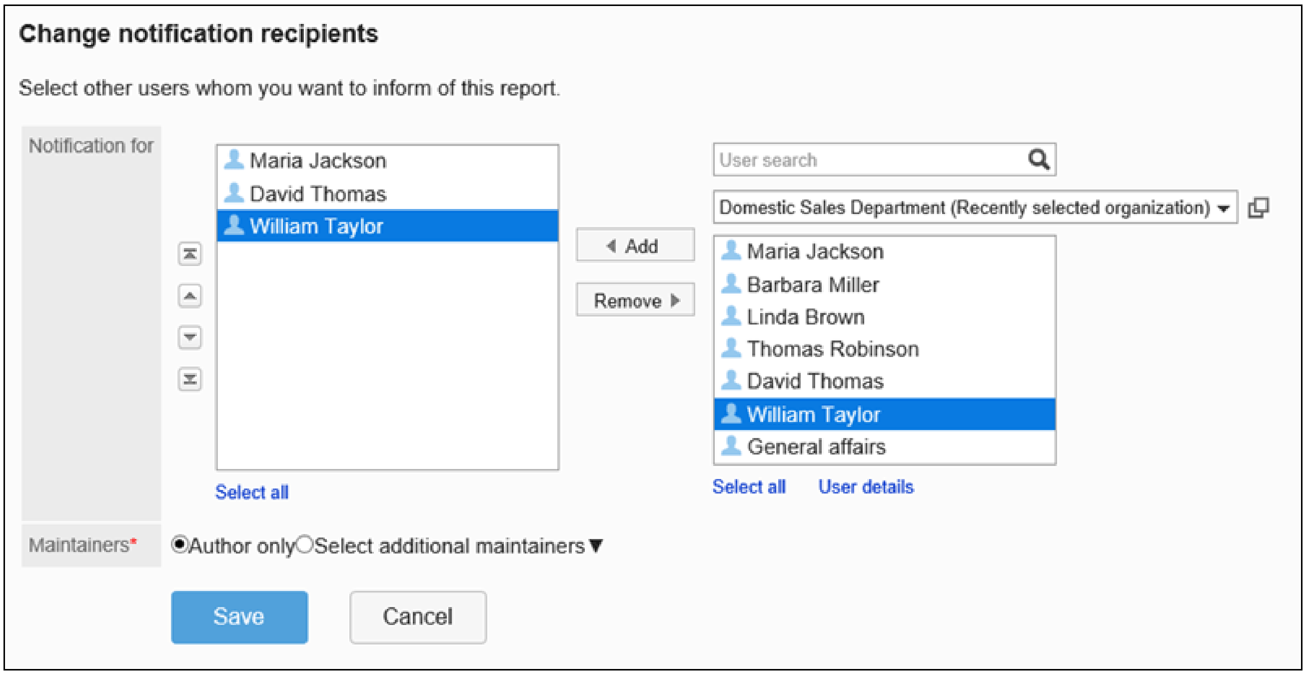
- Maintainers:

  Set users who can change or delete the report.

  You can select one of the following options:

  - Creator only
  - Set maintainers:

    Select users from attendees and notification recipients.



10. Confirm your settings and click "Save".

2.14.6.3. Working with Attachments in Reports

System administrators can view, change, and delete attachments in reports.

Actions on Attachments

Users can work with files attached to body or comment of reports.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. **Click "System settings".**

3. **Select "Application settings" tab.**

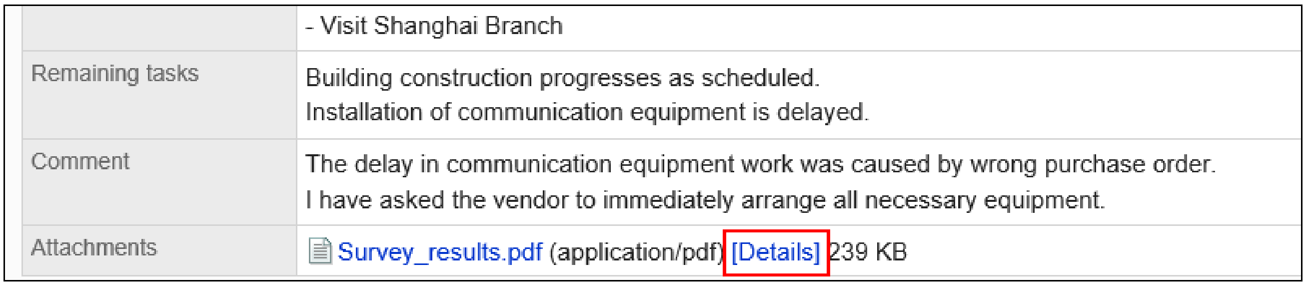
4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category and select a report form.**

7. **Click the subject of report in which you work with attachments.**

8. **On the report details screen, click on report body or "Details" next to the file name of the attachment attached to the comment.**



9. **In "Attachment details" screen, click the link you want to perform.**

For details of managing attachments, refer to the following page:

Updating Files

Changing File Information

Deleting Files

Displaying List of Attachments

Lists all files that users attached to the body or comments of a report.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

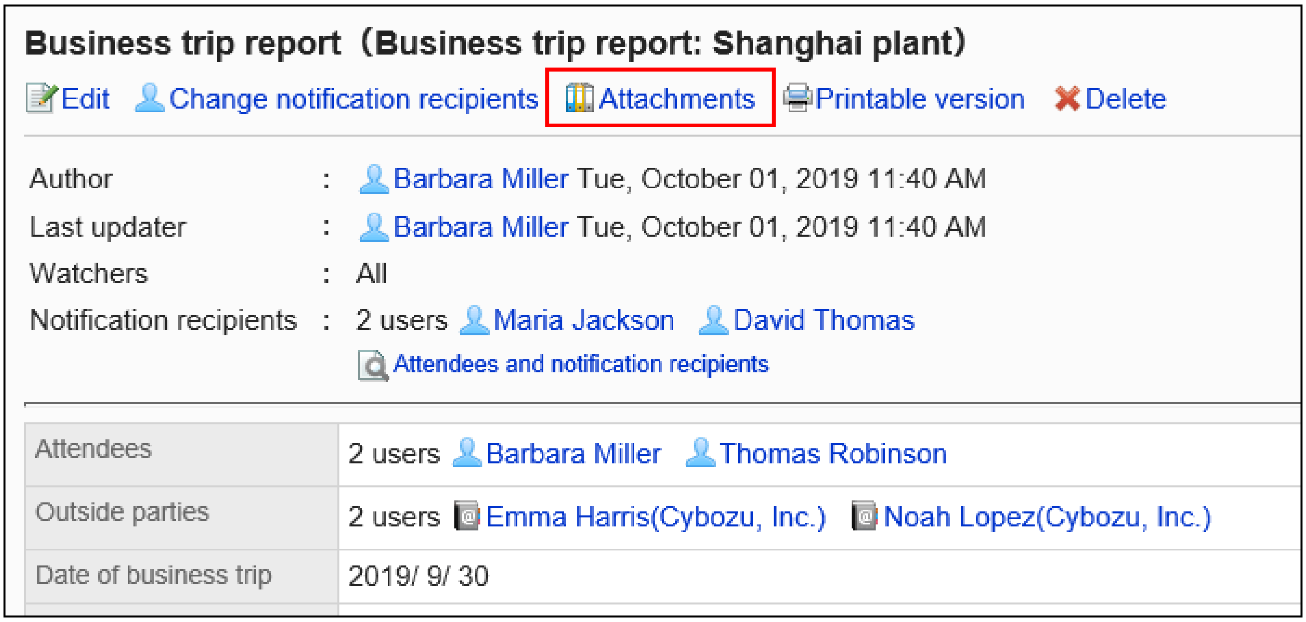
4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category and select a report form.**

7. **Click the subject of report to check attachments.**

8. **In the report details screen, click "Attachments".**



9. **Confirm all attachments in "Attachments" screen.**

2.14.6.4. Printing Reports

Show a report print view and print it.

If a file is attached to the report, its file name will be printed. If you set to show images with body enabled in item settings, images in the view are also printed.

The following items are not printed:

- Notification recipients
- Maintainers
- Comment

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

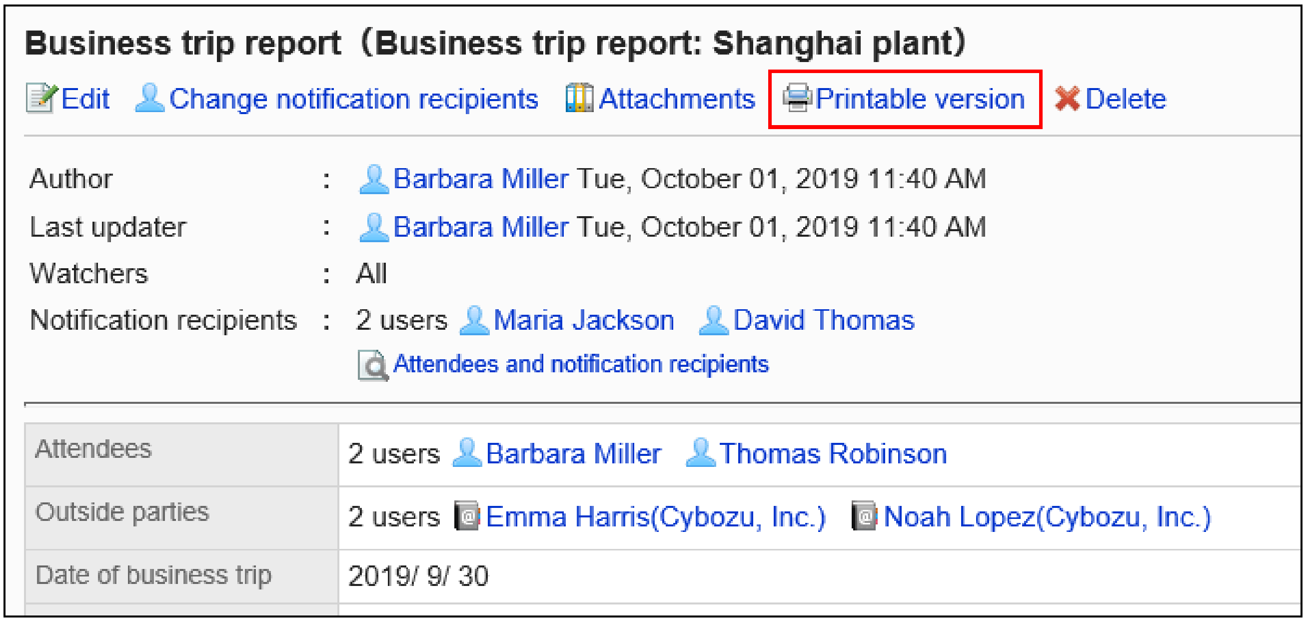
4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category and select a report form.**

7. **Click the subject of the report to print.**

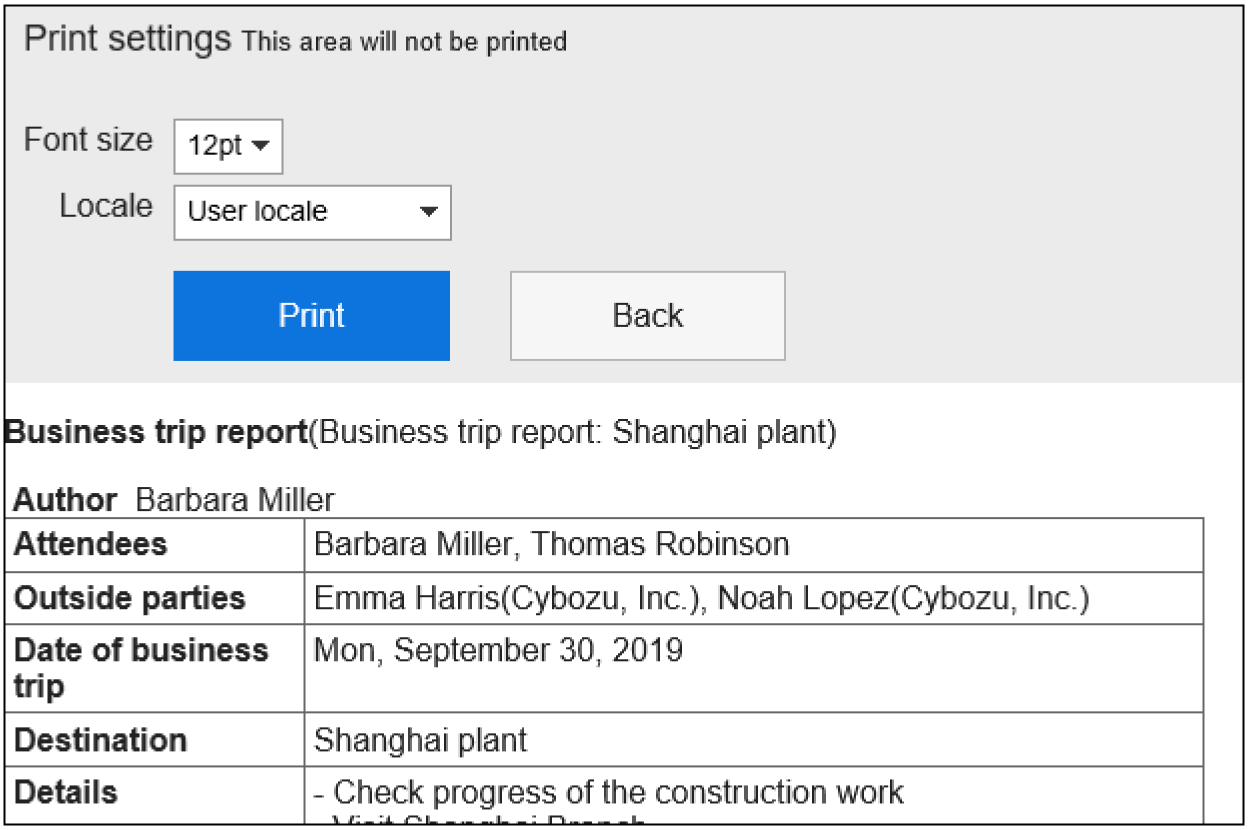
8. **On the report details screen, click "Printable Version".**



9. **On the print settings screen, set the required items and click "Print".**
   - Character Size:

     Select the character size for printing from 8 pt to 20 pt.
   - Locale:

     Apply a language and a time zone for the selected locale.



10. **Print using the print feature of the Web browser.**

2.14.6.5. Deleting Reports

Delete reports.

If you delete reports, the reports are also deleted from user screens.

Caution

- Deleted reports cannot be restored.

Deleting Reports One by One

Delete reports one at a time.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category and select a report form.**

7. **Click the subject of the report to delete.**

8. **On the report details screen, click "Delete".**

9. **Click "Yes" on the screen to delete reports.**

Deleting Multiple Reports in Bulk

Select reports to delete them at once.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. Click "System settings".

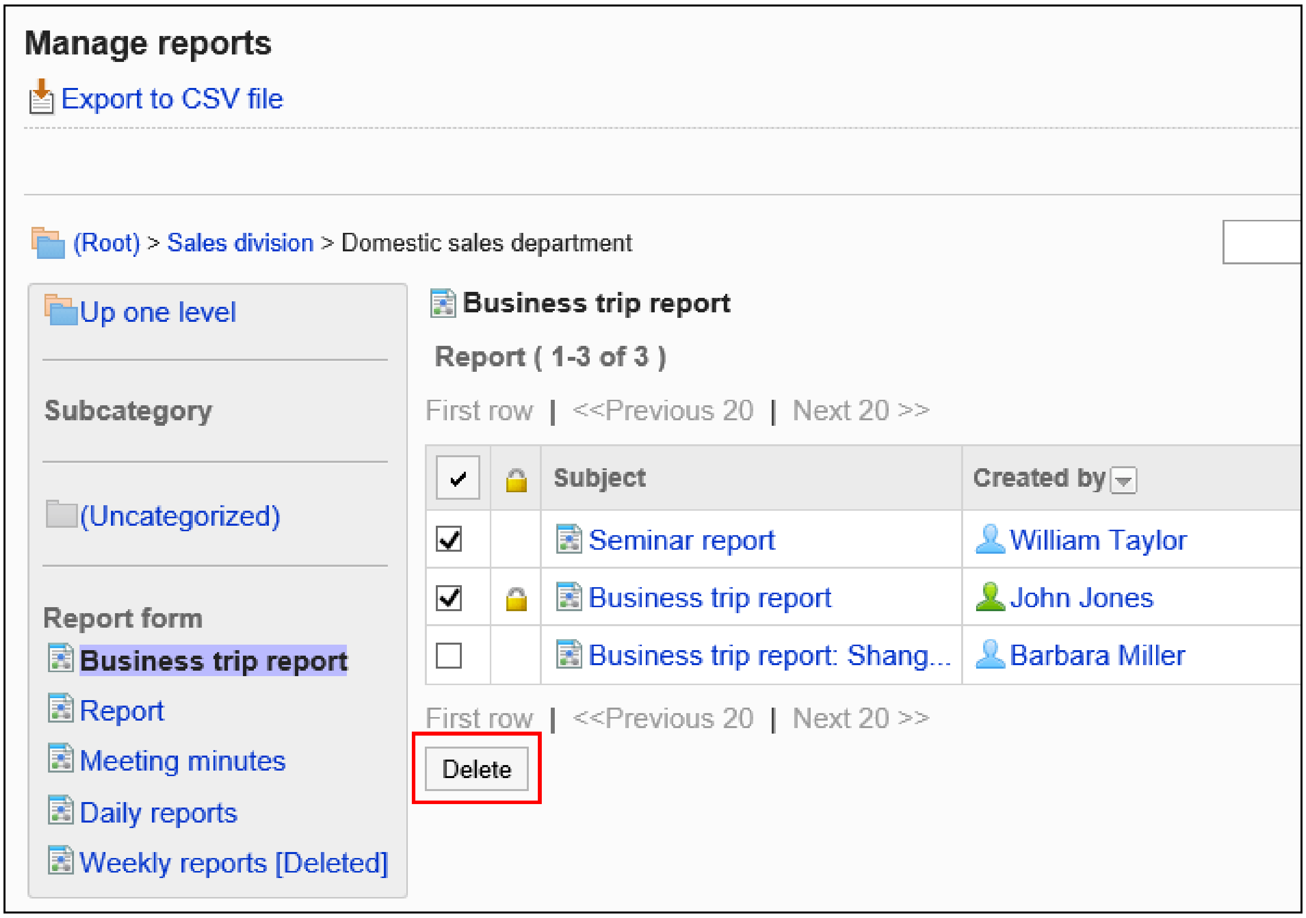
3. Select "Application settings" tab.

4. Click "MultiReport".

5. Click "Manage reports".

6. On "Manage reports" screen, select a category and select a report form.

7. Select check boxes for the reports to delete, and then click "Delete".



8. Click "Yes" on the screen to delete reports.

Deleting All Data in a Report Form

Delete all reports using the same report form.

Steps:

1. Click the Administration menu icon (gear icon) in the header.

2. **Click "System settings".**

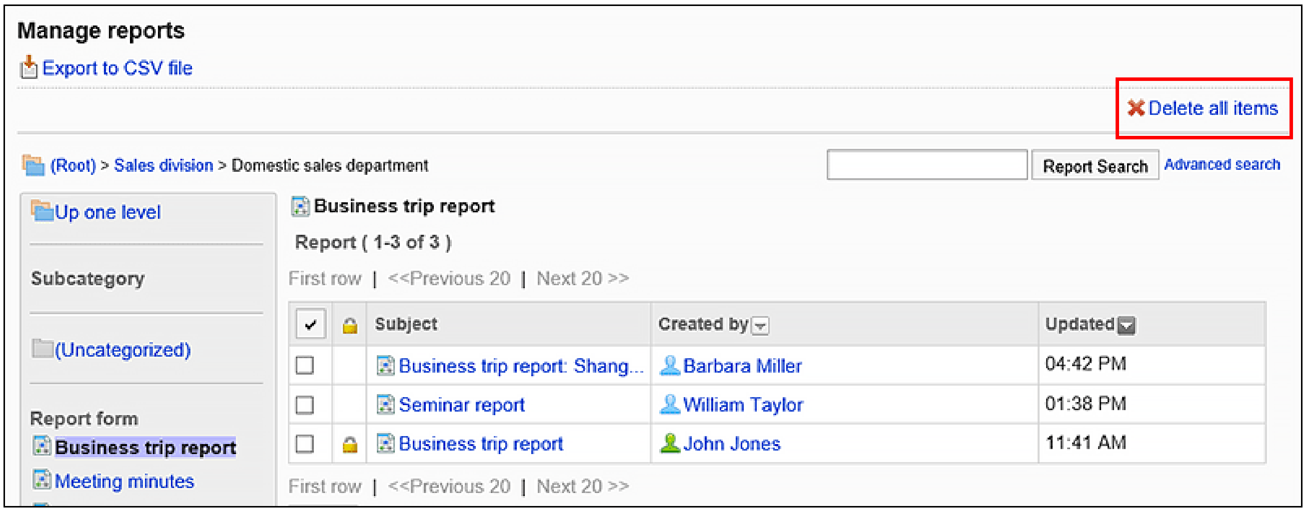
3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category and select a report form.**

7. **Click the item to delete all data from a report form.**



8. **Click "Yes" on the screen to delete all data in a report form.**

2.14.7. Managing Data Using Files

This section describes the types of files available for managing data for report forms or reports, as well as the procedures to export and import data.

References

- Notes on Creating a CSV File(1802Page)

• CSV File Format for MultiReport(1903Page)

2.14.7.1. Managing MultiReport Using CSV Files

Manage multiple report data using CSV files.
The following data can be managed using CSV files:

- Category
- Category names
- Access Permissions

Importing Data from a CSV File

Import categories and user access permission data for multiple reports from CSV files.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in MultiReport(1903Page).

2. **Click the Administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "MultiReport".**

6. **Click "Import from CSV file".**

7. **On "Import from CSV File" screen, select the data to import.**

8. **Select the CSV file that you created in step 1.**

9. **Set the required items for the data to import, and then click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".

10. **Confirm the CSV file contents and click Import.**

Exporting Data to a CSV File

Export categories and user access permission data for MultiReport to a CSV file.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click "Export to CSV file".**

6. **On the "Export to CSV File" screen, select the data to export.**

7. **Set the required items for the the data to export.**

The setting fields are as follows:

- Character encoding:
  Select the character code that you want to use for encoding.
  The following character encoding can be selected:
  - Unicode (UTF-8)
    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".
- Language in which the data is exported:
  This item is used when exporting category names.
  The category names will be exported to a CSV file in the language that you select.
  You can select multiple languages. The following languages can be selected:
  - All
  - 日本語
  - English
  - Simplified Chinese
  - Traditional Chinese
    Exported in Traditional Chinese.

8. **Confirm your settings and click "Export".**

9. **Save the file with a function provided by your Web browser.**

2.14.7.2. Managing Report Forms Using XML Files

Manage report forms using XML files.

Note

- We recommend that not editing XML files and use them only for backing up or restoring data.

Importing Data from an XML file

Import report forms from an XML file into a category.
If an error occurs while attempting to import an XML file, the import is aborted. The data which has been imported will be eliminated.

Note

- If the the report form codes in existing data match the codes of data to import in same category, the imported data overwrites the existing data.
- An error occurs while importing an XML file if the report form codes in the existing data in another category matches the codes of data to import.

Steps:

1. **Create an XML file to import data.**

2. **Click the Administration menu icon (gear icon) in the header.**

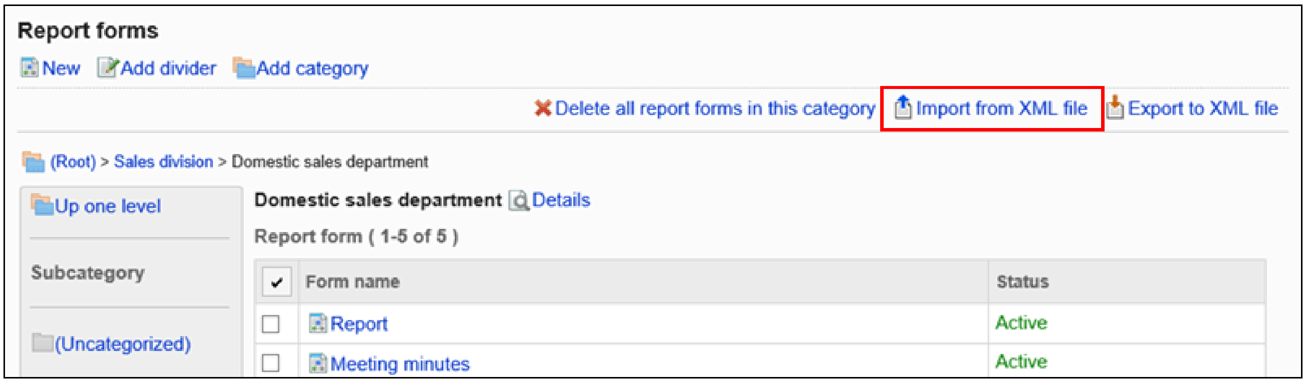
3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "MultiReport".**

6. **Click the report form list.**

7. **On the screen for report form list, select a category, and then click to import from a XML file.**



8. **On the screen to import report forms, select the file to import, and click "Import".**

Exporting Data to an XML File

Export report forms in the category to an XML file.
All report forms in the category are exported in one file.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

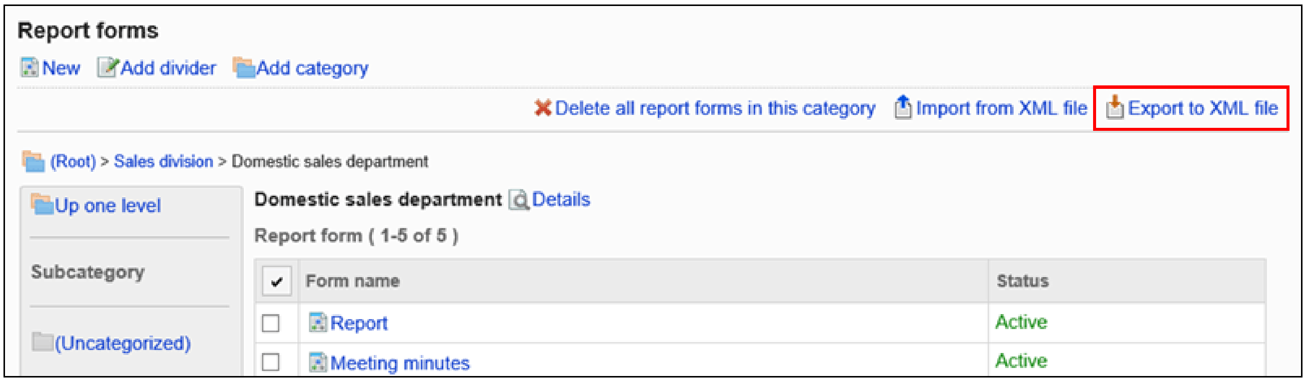
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click the report form list.**

6. **On the screen for report form list, select a category, and then click to export to a XML file.**



7. **On the screen to export report forms, click "Export".**

8. **Save the file with a function provided by your Web browser.**

2.14.7.3. Exporting Reports to a CSV File

Export report data to a CSV file for each report form. The CSV file can be used as backup data.
The report data cannot be imported from a CSV file.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

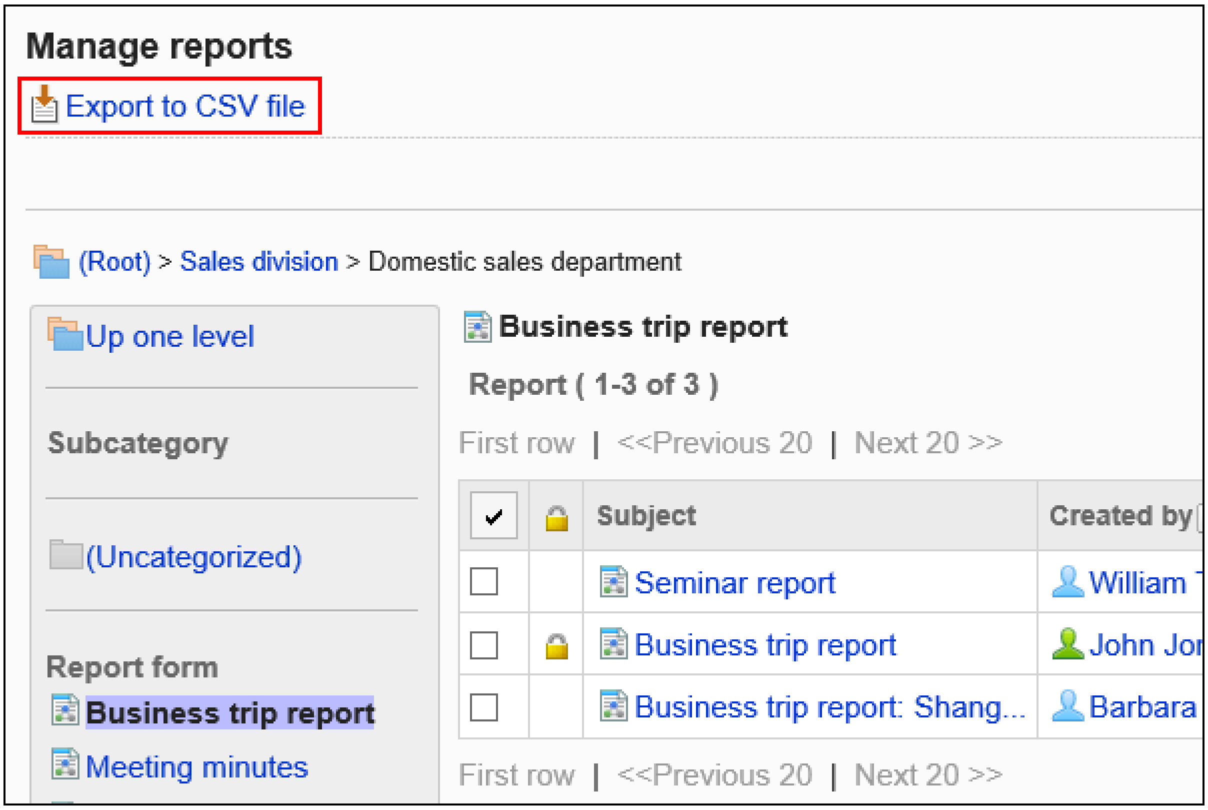
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "MultiReport".**

5. **Click "Manage reports".**

6. **On "Manage reports" screen, select a category, then select a report form, and then click "Export to CSV file".**



7. On the screen to export reports, set the required items for the exported data.

The setting fields are as follows:

- Items:

  Select items of report forms to export to a CSV file.

  Select the items to export from the available item list, and click "Add".

  To delete items, select the item to delete from the export item list, and then click "Delete".

- Character encoding:

  Select the character code that you want to use for encoding.

  The following character encoding can be selected:

  - Unicode (UTF-8)

    You can select with BOM as required.
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)

- Include header row:

  To export an item name to the header row of a CSV file, select "Yes".

8. Confirm your settings and click "Export".

9. Save the file with a function provided by your Web browser.

2.15. Cybozu Online Service

Cybozu Online Service is a service provided by Cybozu, Inc. on the Internet.

When you enable Cybozu Online Service, the following services and data can be used in Garoon.

- Service:
  - Route search
- Event data:
  - Weather forecast
  - Rokuyo

References

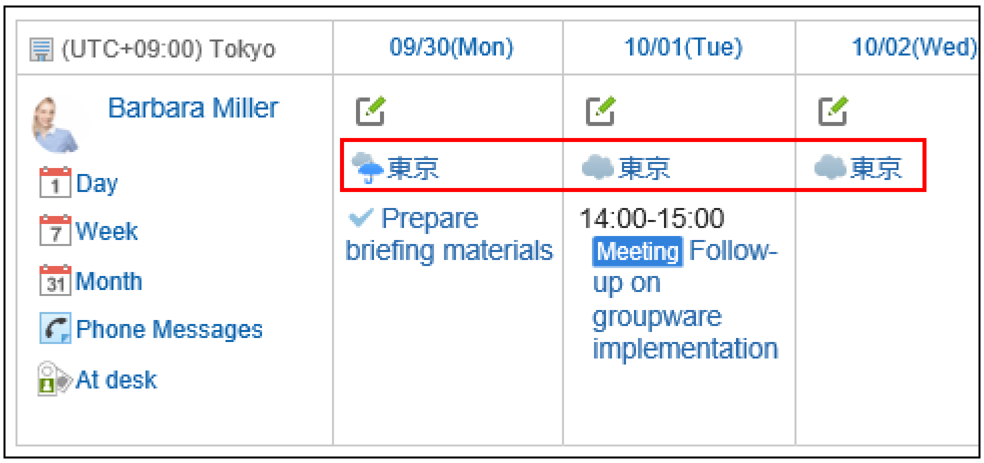
- General Settings for Cybozu Online Service(1593Page)
- Setting up Services to Use(1594Page)
- Receiving Event Data(1595Page)

2.15.1. General Settings for Cybozu Online Service

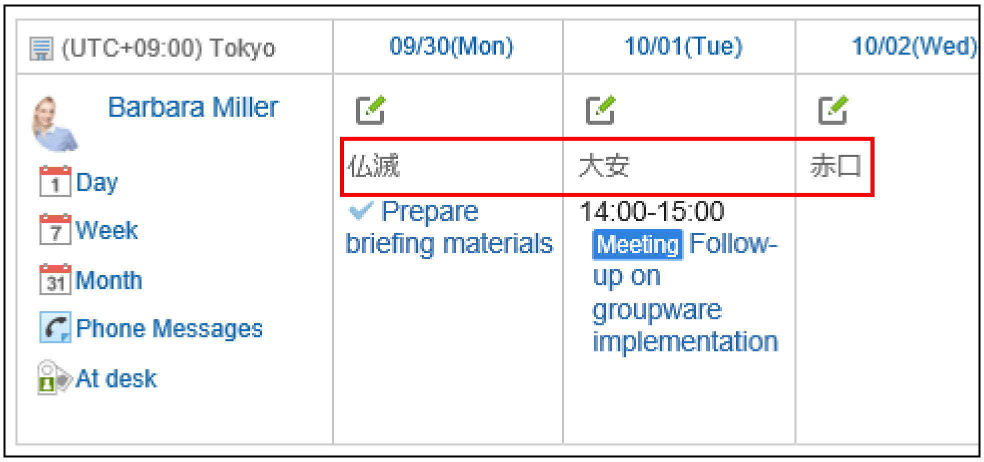
On "General settings" screen of Cybozu Online Service, you can set whether to send an individual ID to Cybozu Online Service Web sites.
The individual ID is used by Cybozu Online Service to identify customers and Garoon users.
By sending an individual ID, you can use the following services:

- Route search

- Weather forecast



- Rokuyo



Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Cybozu Online Service".**

5. **Click "General Settings".**

6. **On "General Settings" screen, select whether to send an individual ID.**

To use Cybozu Online Service, you must select "Send application ID to Cybozu Online Service".

7. **Confirm your settings and click "Save".**

2.15.2. Setting up Services to Use

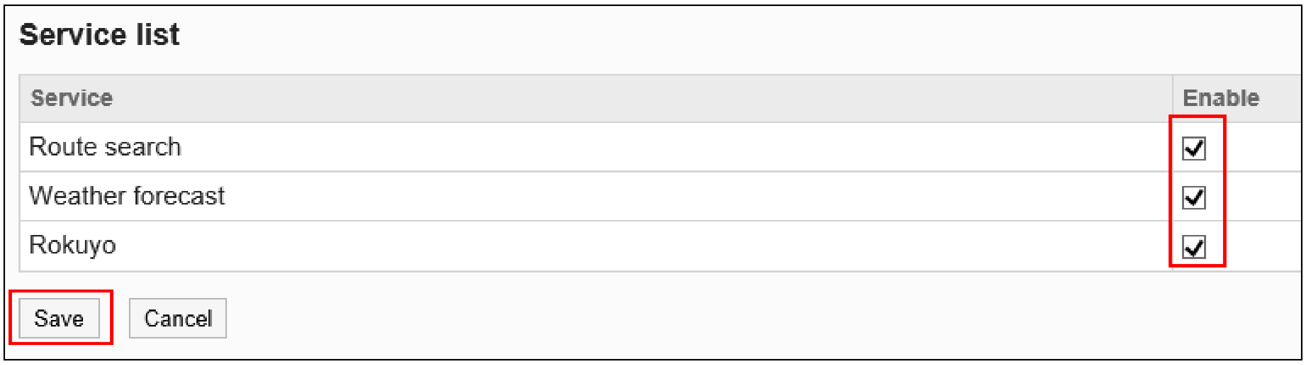
Select which of the following services to use provided by Cybozu Online Service:

- Route search
- Weather forecast
- Rokuyo

All services are available in Japanese only.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cybozu Online Service".**
5. **Click the service list.**
6. **On the service list screen, select the check boxes for the services to use, and then click "Save".**



7. **Notify users that they can set items in calendars on their "Personal settings" screens.**

   For instructions on how to display Rokuyo and weather forecast, refer to Calendar Settings.

2.15.3. Receiving Event Data

Receive event data for weather forecasts and Rokuyo immediately.
This is useful when the Cybozu Online Service takes a long time after completing its connection setting to receive the weather forecast and the Roku data automatically.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

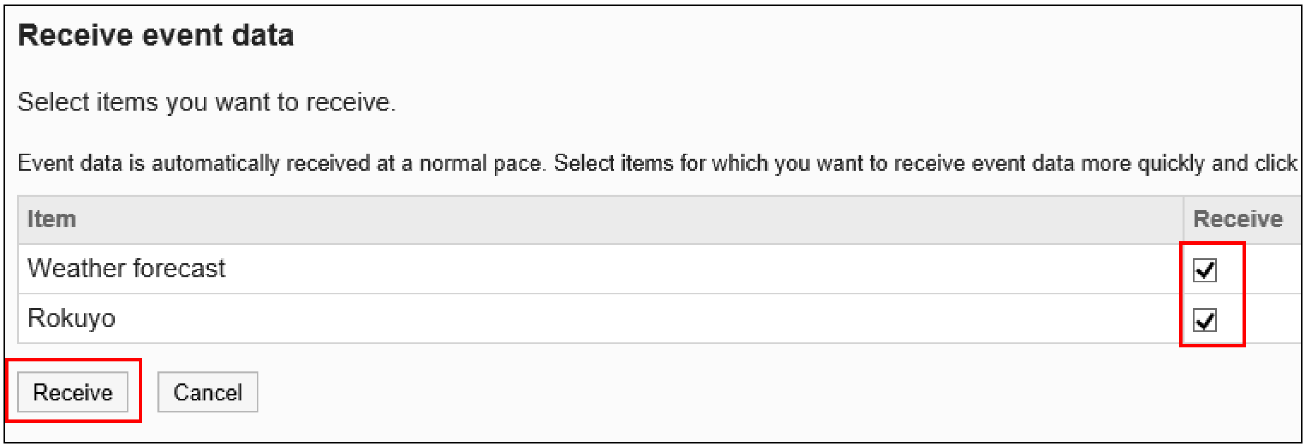
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Cybozu Online Service".**

5. **Click "Receive event data".**

6. **On the "Receive event data" screen, select the check boxes of the contents to receive, and then click "Receive".**



The following data can be received:

- Weather forecast
- Rokuyo
  The data to be received is for past five years and next two years from the current year.
  For example, when you receive data in 2017, you can receive data from 2012 to 2019.

2.16. Presence Indicators

Presence indicators is an application to display user status on schedulers and phone notes.
System administrators and application administrators can enable automatic status setting or set status menus.

References

- Enabling Automatic Status Setting(1597Page)

2.16.1. General Settings for Presence Indicators

In the general settings for Presence indicators, you can set basic functions for Presence indicators such as automatically setting the status and whether to allow users to set proxies.

Enabling Automatic Status Setting

You can enable Auto-setting for both Present and Absence.

- **When you chose to enable Present status Auto-setting**:
  The time shown in the presence information is updated each time the user logs in to Garoon.
- **When you chose to enable Absent status Auto-setting**:
  Closing Web browsers doesn't change the status.
  The status changes when the user clicks "Logout".

Note

- If you enable Open Integrated Authentication ver.2 or environment variable authentication, the automatic status setting is disabled.
- When you logged in or logged out of the following products, the status is not changed even though the automatic status settings are enabled:
  - Cybozu Desktop
  - KUNAI (sync mode)

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Presence indicators".**

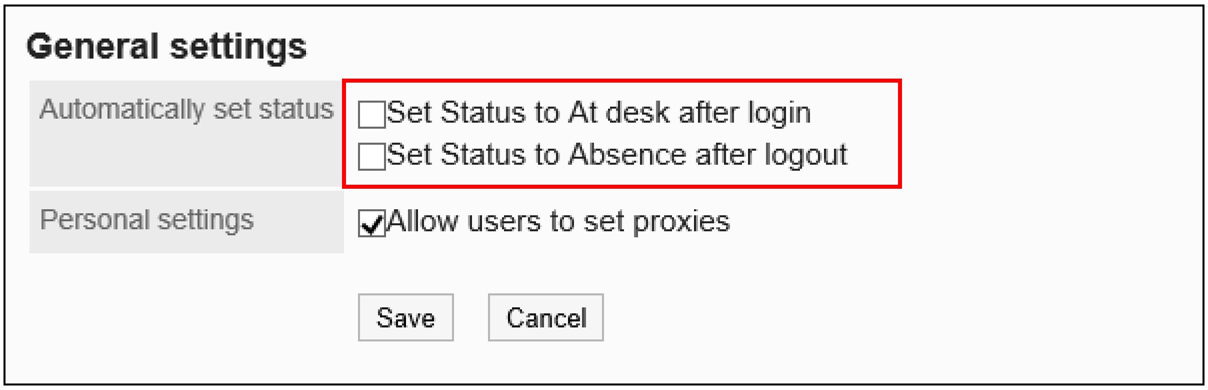
5. **Click "General Settings".**

6. **In the automatic status setting field on "General settings" screen, select the check box to enable the status auto-setting.**

   The following statuses can be set.

   - To set as Presence at logging in:
     When a user logs in, the status of the user is automatically set to Present.
   - To set as Absent at logging out:
     When a user logs out, the status of the user is automatically set to Absent.

   To disable the automatic setting, clear the check box.



7. **Confirm your settings and click "Save".**

Allowing to Set Proxies

Set whether to allow users to set their own proxies.

For instructions on how to operate users, refer to Setting up Proxies.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. Click "Presence indicators".

5. Click "General Settings".

6. In "Personal settings" field on "General Settings" screen, select the the check box to allow proxy settings.

If you do not allow to change proxy settings, clear the check box.

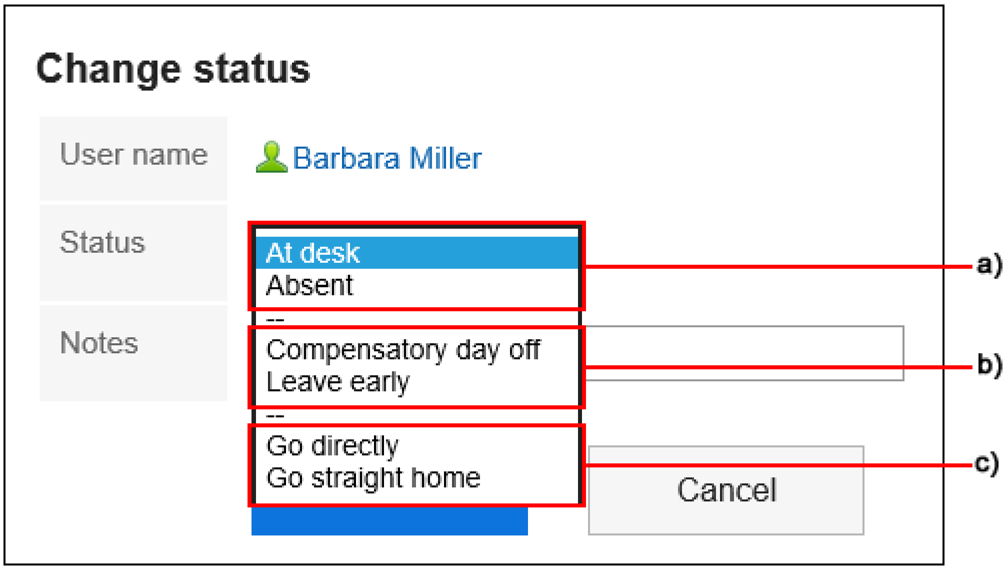
7. Confirm your settings and click "Save".

2.16.2. Setting Statuses

Sets the status of presence information.
Status set here can be selected as a menu item to change presence information of users using the screens such as scheduler and phone notes.
The order in which the status menus are displayed is as follows.

- Present
- Absent
- Statuses set by system administrators
- Statuses set by users

Present and Absent are preset as menus. They cannot be changed or deleted.



a): Pre-configured statuses

b): Statuses set by system administrators

c): Statuses set by users

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

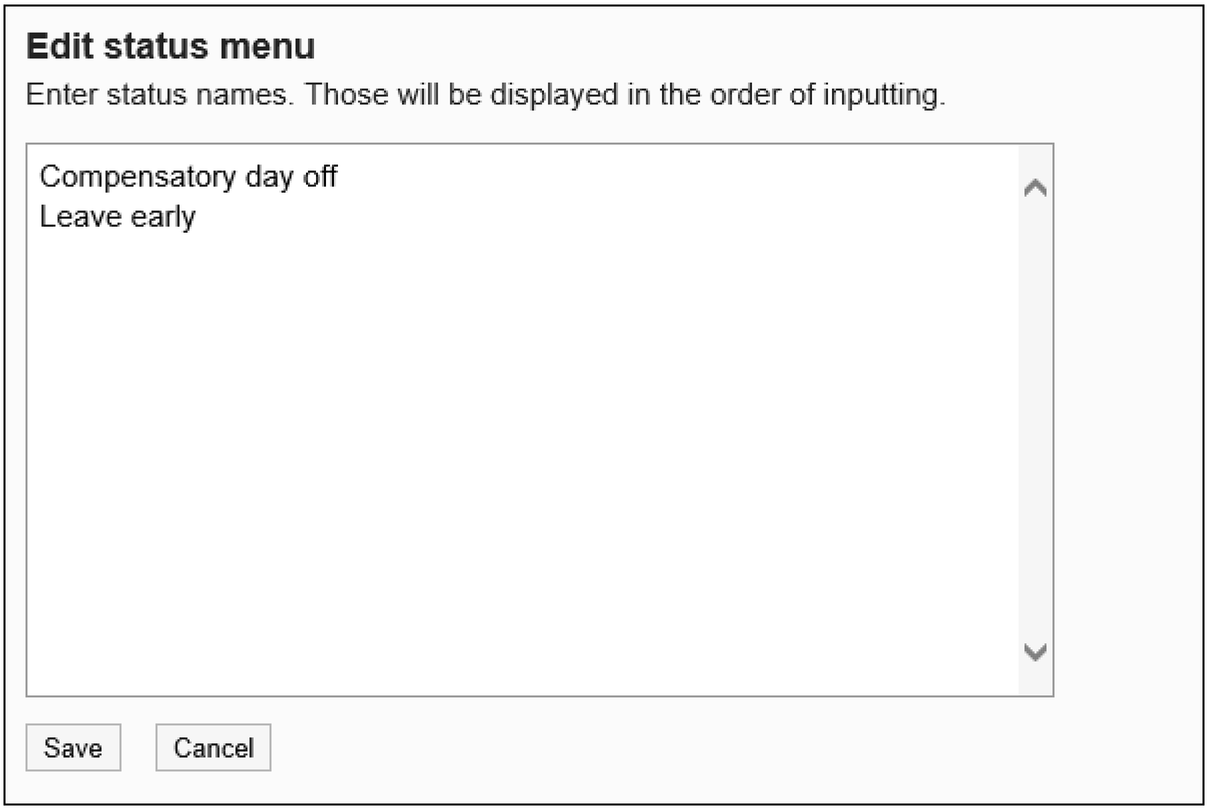
3. **Select "Application settings" tab.**

4. **Click "Presence indicators".**

5. **Click the item to set statuses.**

6. **On the screen to set statuses, enter a status per line.**

   The statuses are displayed in the order in which they are entered on the user screen.



7. **Confirm your settings and click "Save".**

2.16.3. Setting up Proxies

Proxies are users who can change the presence information on behalf of individual users.
When you set a proxy for an department, the proxy user is set as a proxy for all users belonging to the department.
If your system administrator allows users to set their proxies, users can change and delete their proxies from the personal settings.

Adding Proxies

Add proxies for departments or users.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

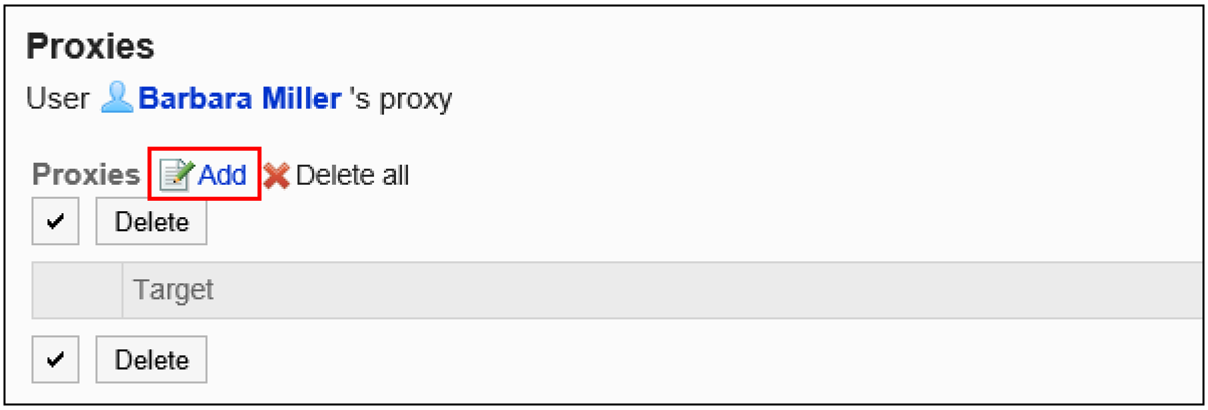
3. **Select "Application settings" tab.**

4. **Click "Presence indicators".**

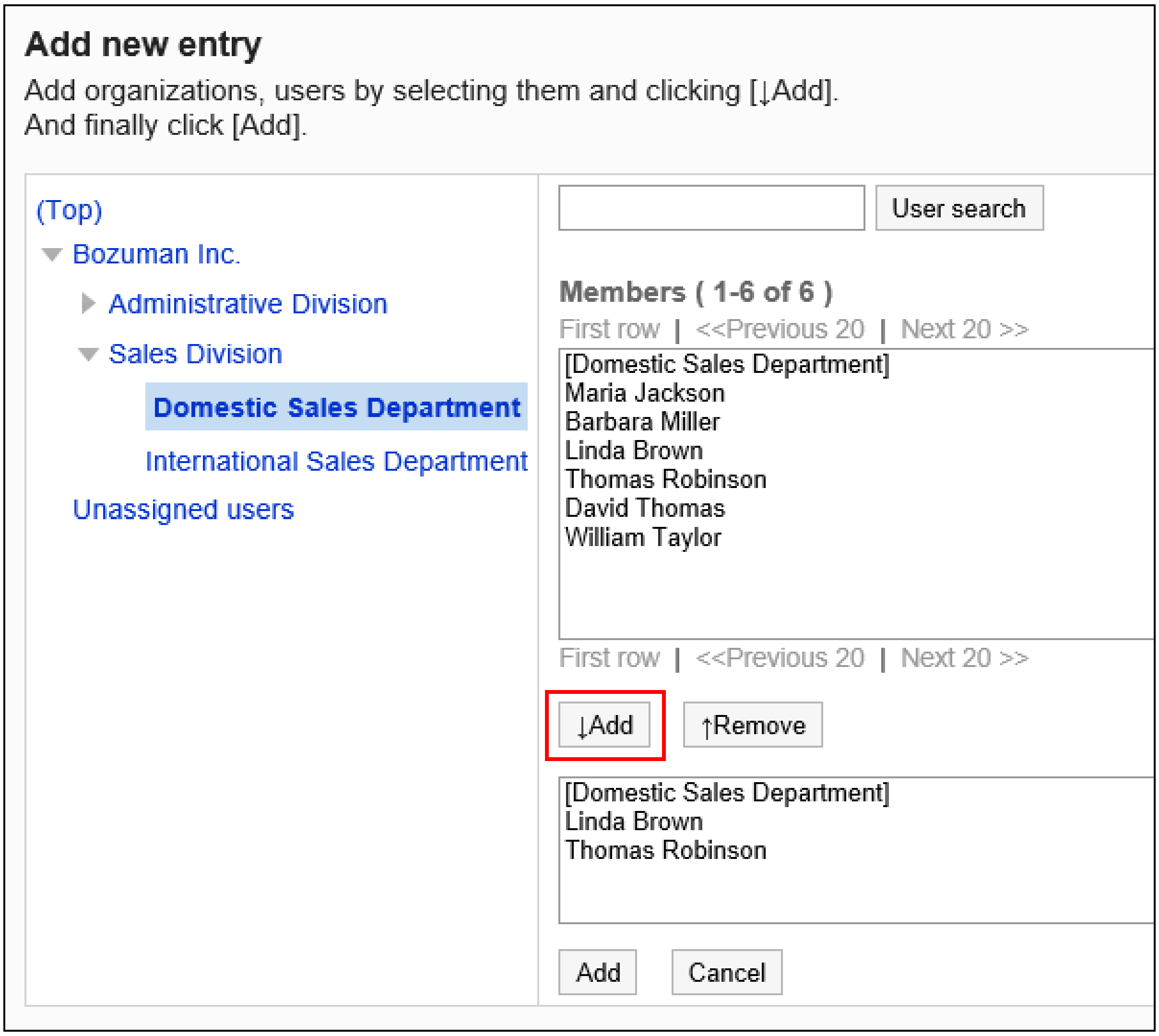
5. **Click the item to set proxies.**

6. **On the screen to set proxies, select the organization or user to set a proxy for.**

7. **On the proxy list screen, click "Add".**



8. **On the screen to add proxies, select the department or user to set a proxy, and click "Add".**



9. **Confirm your settings and click "Add".**

Deleting Proxies

Delete proxies from departments or users.

Selecting Proxies to Delete

Select a proxy to delete.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

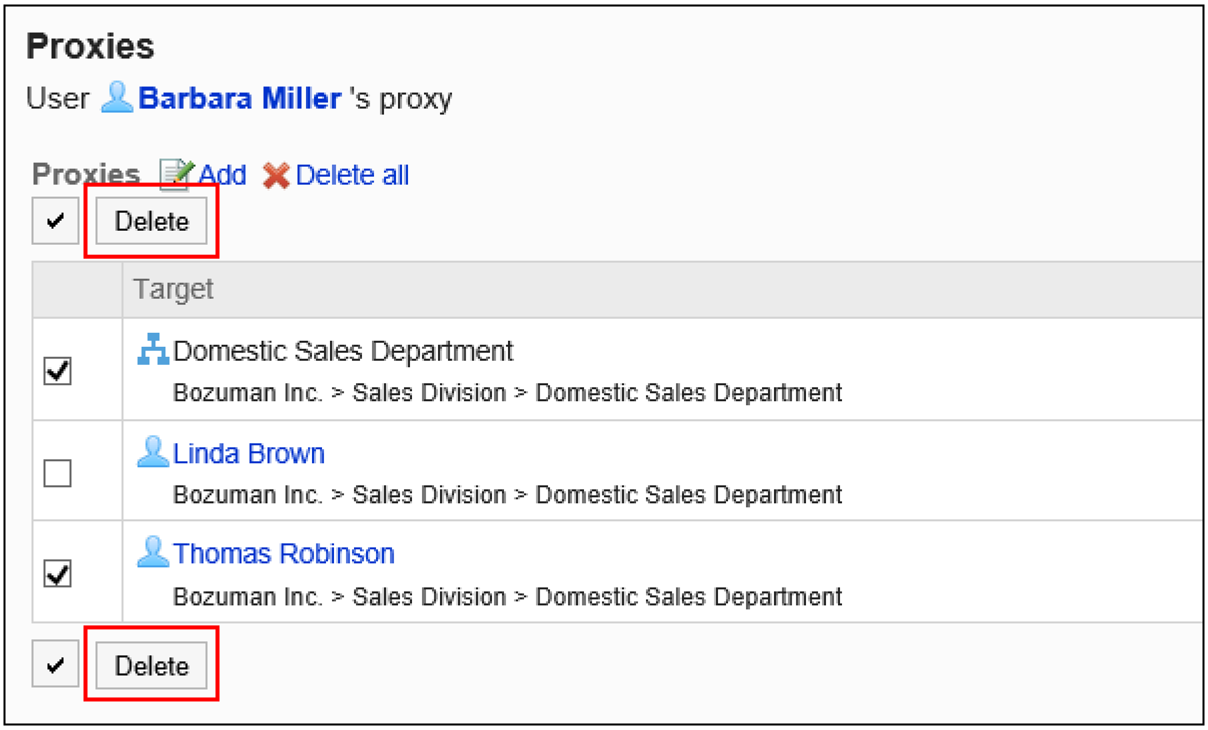
3. **Select "Application settings" tab.**

4. **Click "Presence indicators".**

5. **Click the item to set proxies.**

6. **On the screen to set proxies, select the organization or user to delete their proxy.**

7. **On the proxy list screen, select the check boxes of the departments or users to delete from proxies, and then click "Delete".**



8. **Click "Yes" on the screen to delete proxies.**

Delete All Proxies

Delete all proxies.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

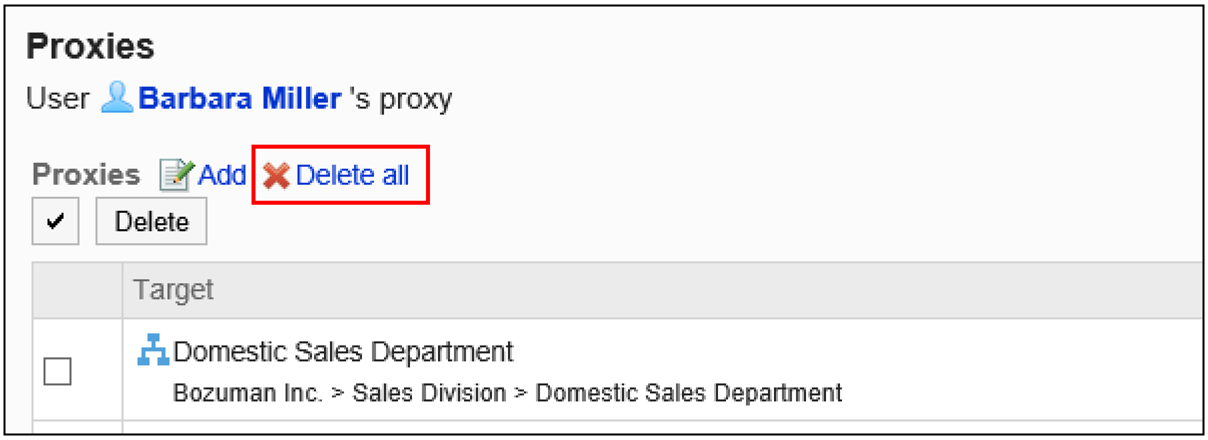
3. **Select "Application settings" tab.**

4. **Click "Presence indicators".**

5. **Click the item to set proxies.**

6. **On the screen to set proxies, select the organization or user to delete their proxy.**

7. **On the proxy list screen, click "Delete all".**



8. **Click "Yes" on the delete all proxies screen.**

2.16.4. Managing Proxies Using CSV Files

Manage proxies using CSV files.

Importing Data from a CSV File

Import proxies from a CSV file.
If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in Presence indicators(1910Page).

2. **Click the administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Presence indicators".**

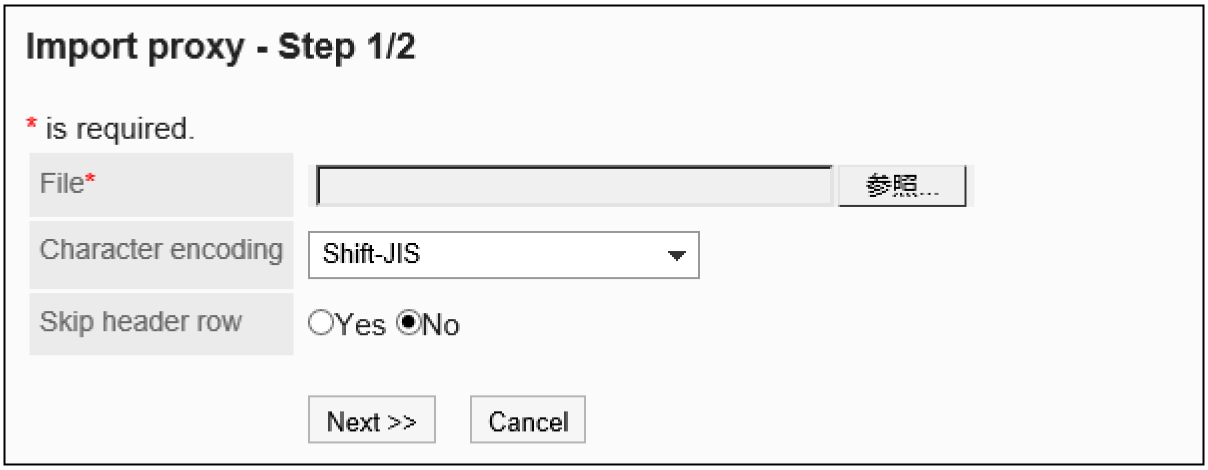
6. **Click the item to import proxies.**

7. **On the screen to import proxies step 1/2, select the CSV file created in step 1.**

8. **Set the required items for the data to import, and then click "Next".**

The setting fields are as follows:

- Character encoding:
  Encodes data from a CSV file with the selected character code.
  The following character encoding can be selected:
  - Unicode (UTF-8)
  - Japanese (Shift-JIS)
  - ASCII
  - Latin1 (ISO-8859-1)
  - Simplified Chinese (GB2312)
  - Thai (TIS-620)
- Skip the first row:
  If the header row contains information other than data such as an item name and a comment, select "Yes".



9. **On the screen to import proxies step 2/2, check the contents in the CSV file, and click "Import".**

Exporting Data to a CSV File

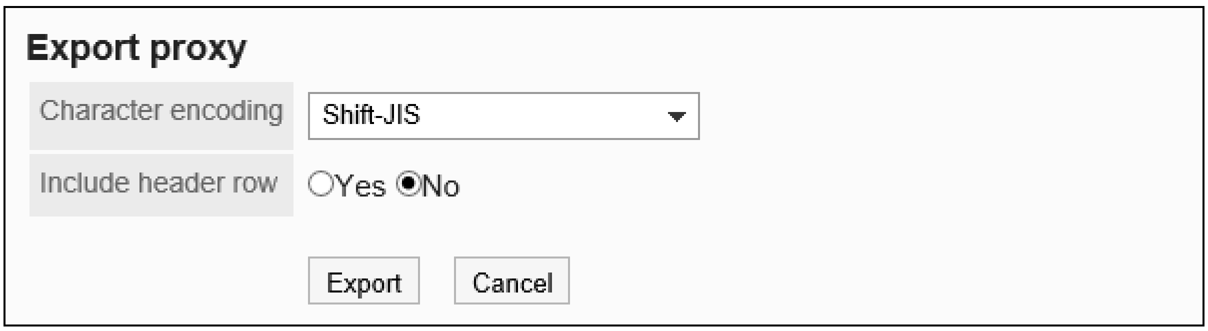
Export proxies to a CSV file.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Presence indicators".**
5. **Click the item to export proxies.**
6. **On the screen to export proxies, set the required items for the exported data.**

   The setting fields are as follows:

   - Character encoding:
     Select the character code that you want to use for encoding.
     The following character encoding can be selected:
     - Unicode (UTF-8)
       You can select with BOM as required.
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)
   - Include header row:
     To export an item name to the header row of a CSV file, select "Yes".



7. **Confirm your settings and click "Export".**

8. Save the file with a function provided by your Web browser.

2.17. Favorites

"Favorites" is an application that allows users to add and view frequently used files and topics.
The system administrator and the application administrator can set up favorite limits and items that can be added to favorites.

2.17.1. General Settings of Favorites

On the "General settings" screen of your favorites, you can set the basic functions of your favorites.

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

3. Select "Application settings" tab.

4. Click "Favorites".

5. Click "General Settings".

6. In the "General settings" screen, set the "Favorite upper Limit" field.

The maximum value of a favorite is the sum of items in an application that can be added to favorites.
The maximum value that can be selected is as follows

- 50
- 100
- 200
- 300
- Unlimited

The default value is 50.

7. Confirm your settings and click "Save".

2.18. Notifications

Notifications is an application that allows users to check notifications they received on updates for each application.

Note

- Notifications displayed are kept for 30 days. After the retention period, notifications are automatically deleted. However, unchecked Phone Messages and notifications for workflows will not be deleted until they are checked.
- To receive notifications when messages and topics are updated, you must set update notifications for each folder or category.

References

- Notifications Portlets(768Page)
- Allow external notifications through API(1620Page)

2.18.1. Notifications Portlet View Settings

Set how notifications are displayed in the Notifications portlet for each application.
You can also prevent users from changing the display settings.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

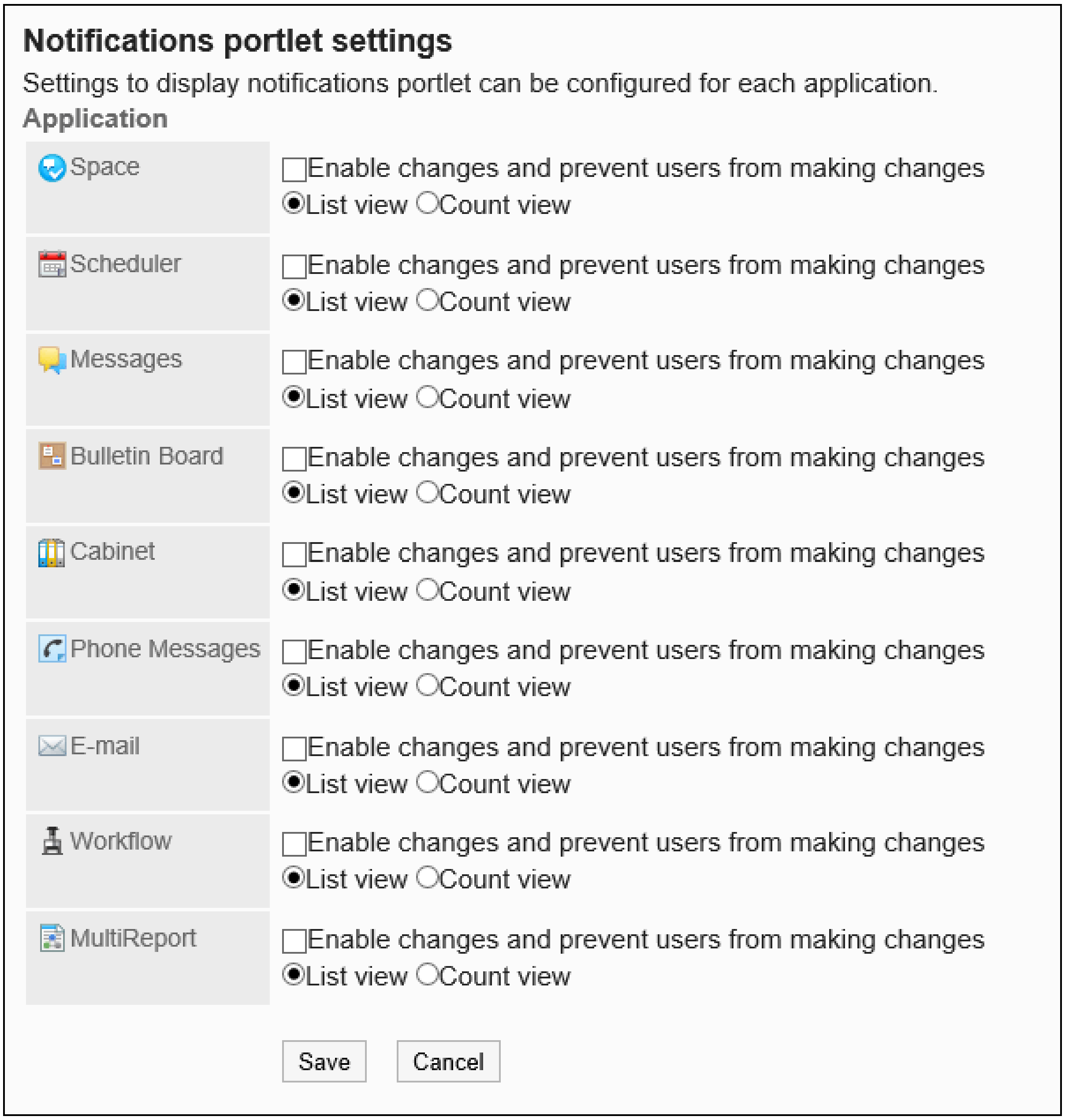
2. **Click "System settings".**

3. **Select "Application settings" tab.**

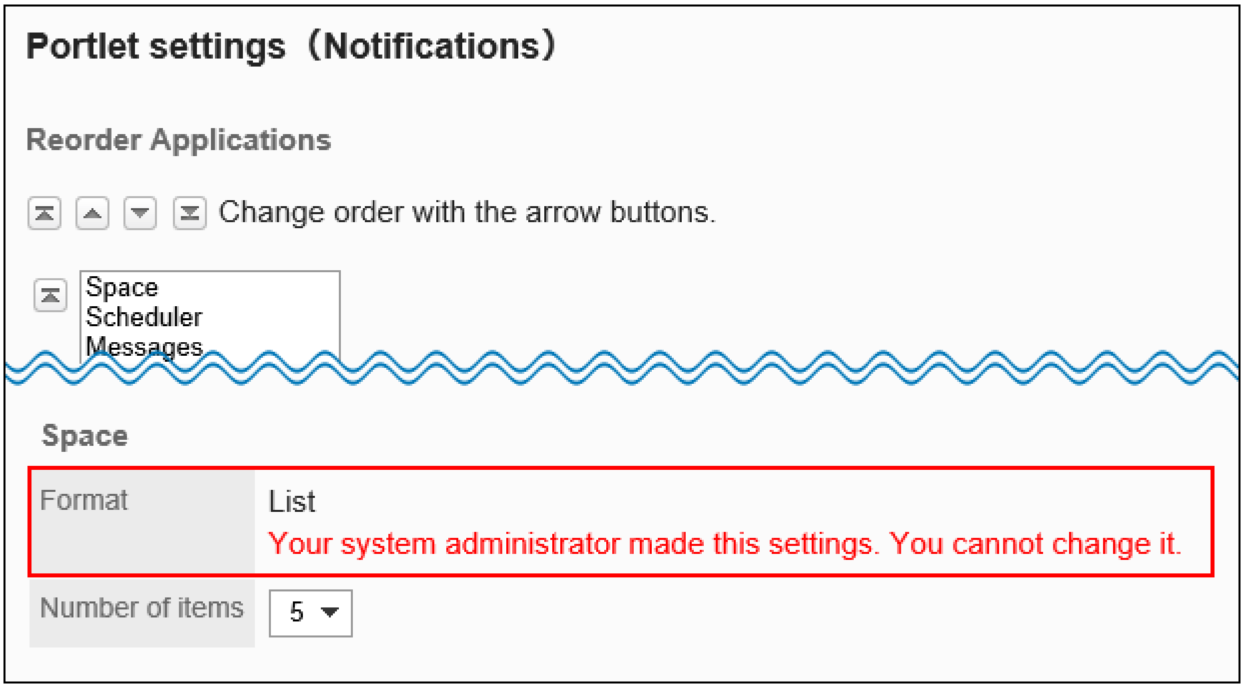
4. **Click "Notifications".**

5. **Click "Notifications portlet settings".**

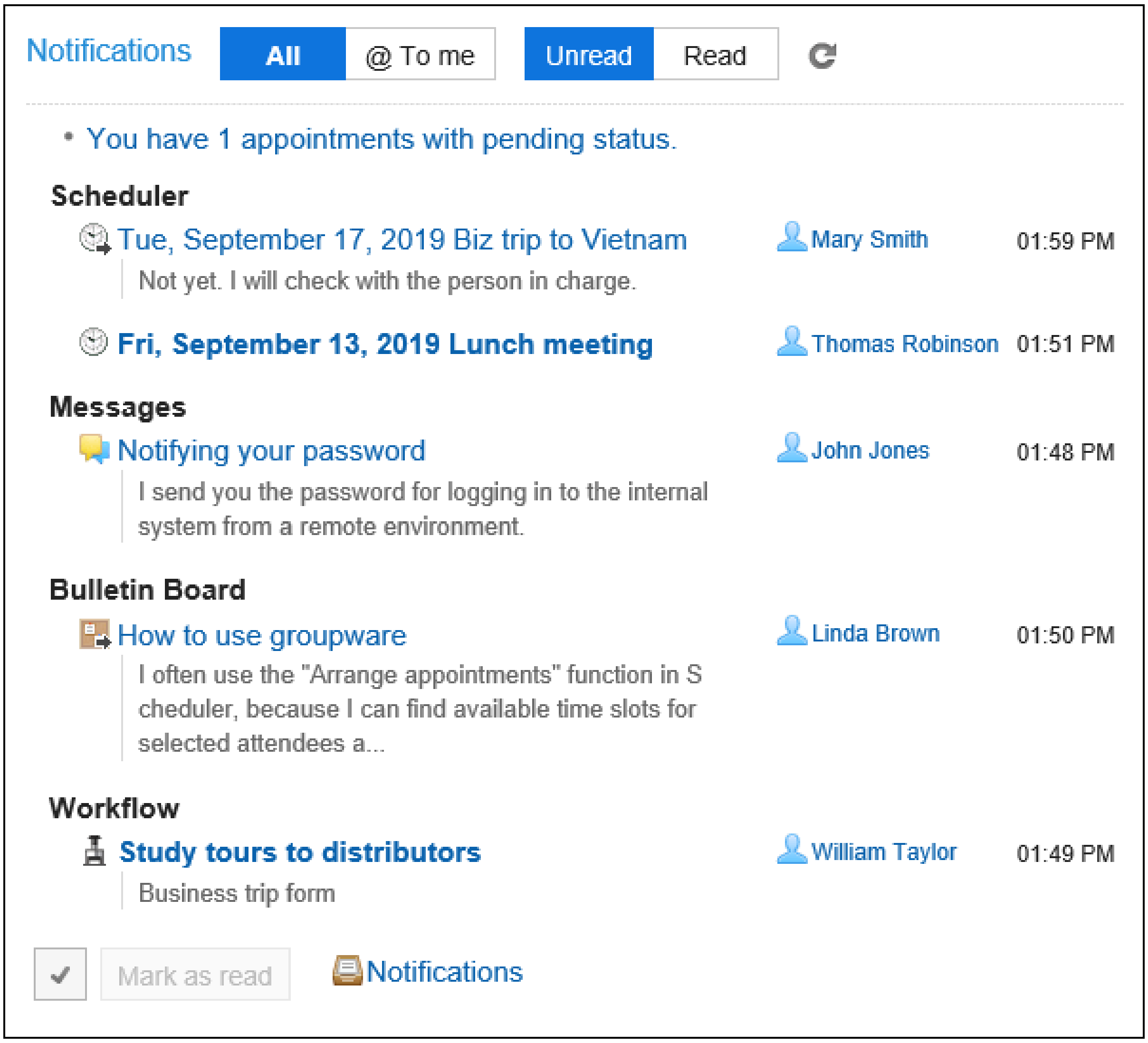
6. **On the "Notifications portlet settings" screen, set how to show Notifications portlets.**



- Enable this setting to not to allow users to change the display settings:
  When you select the check box, the settings are immediately applied to user screens.
  In addition, you cannot change how notifications are displayed in the application on the "Notifications portlet settings" screen on system administration or personal settings.

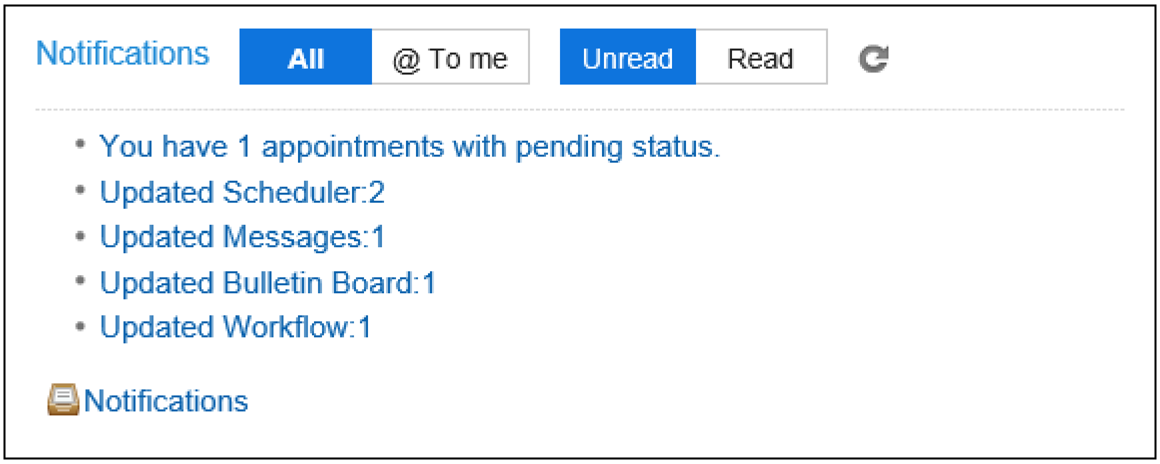


- Show in list:
  Show the updated information in list. It shows information such as subjects and the updated users.



- Show by numbers:

  It shows the message indicating that the update has been received and the number of items received.



7. Confirm your settings and click "Save".

Note

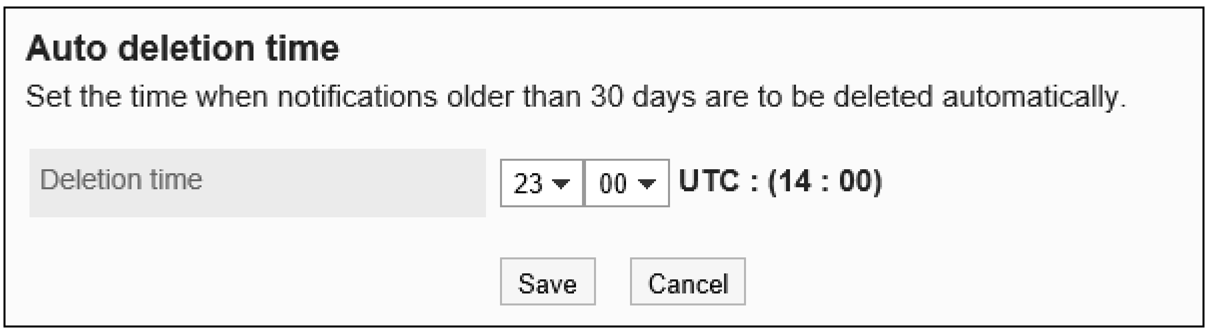
- If you have more than 99 unread notifications, the number of items is displayed as "99+".
- You can also set the default value for items showing in Notifications portlets and its numbers to show.
  For details, refer to Default Settings in Notifications Portlet(1614Page).

2.18.2. Auto-Delete Settings

After the retention period, notifications are automatically deleted at the specified time.
By default, the deletion process starts at 23:00 am (UTC 14:00) the next day after the end of retention period.
Change the start time of auto-delete notifications.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Notifications".**
5. **Click to auto-delete settings.**
6. **On the screen to auto-delete settings, specify the time when you want to start the notification deletion process.**



7. Confirm your settings and click "Save".

Note

- For the setting to start the auto-delete notifications, the time zone of the administrator who set the time is applied. If the system administrator uses a time zone that has daylight saving time, the deletion process starts at the daylight saving time.

2.18.3. Default Settings in "Notifications" Portlet

Set the default value of items displayed in Notifications portlets and the number of notifications to be displayed. This default value is applied when you deploy Notifications portlets in portals.

Note

- When you change the settings for Notifications portlets, refer to the procedure in Changing Portlet Configurations(662Page).

Steps:

1. Click the administration menu icon (gear icon) in the header.

2. Click "System settings".

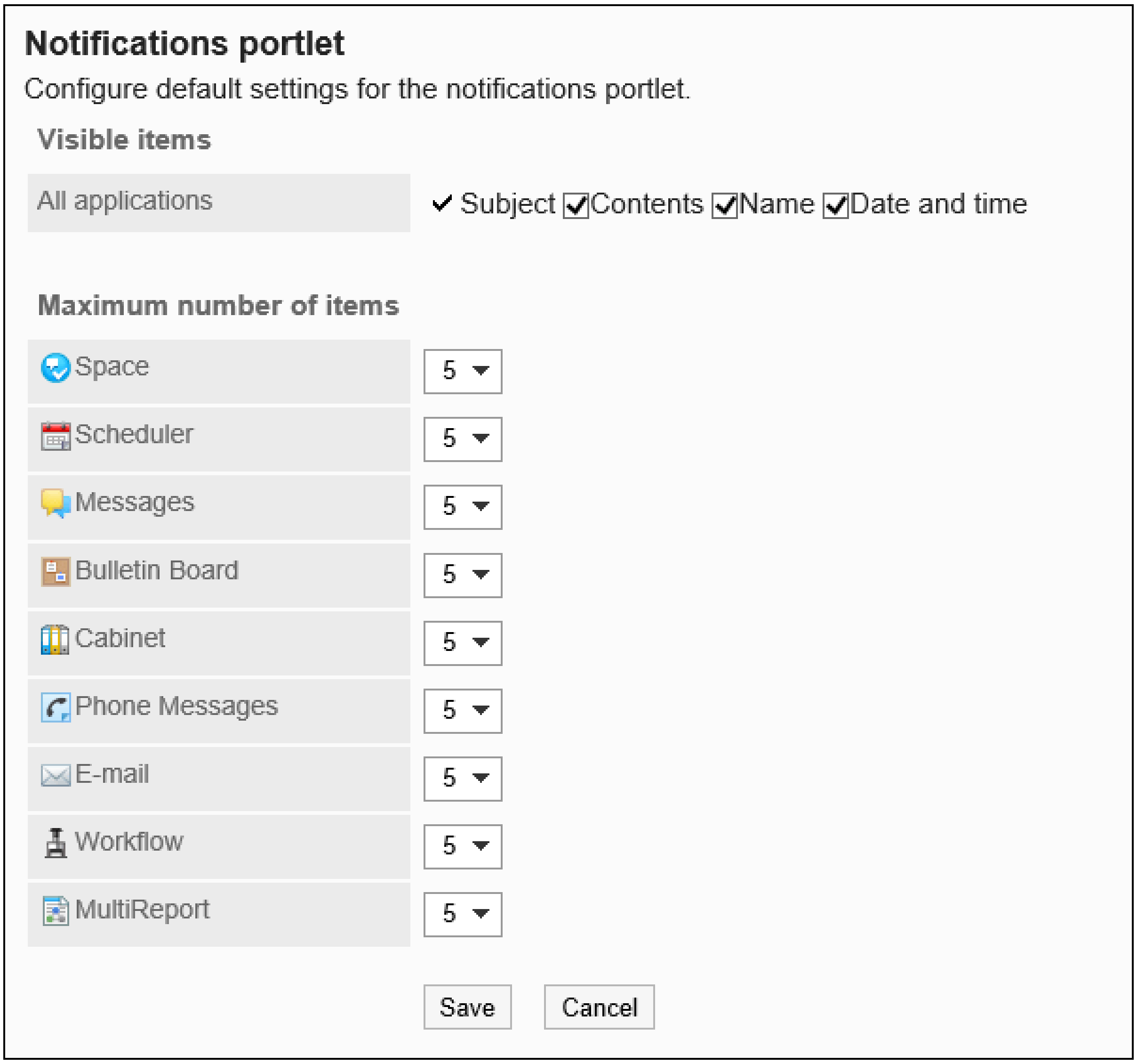
3. Select "Application settings" tab.

4. Click "Notifications".

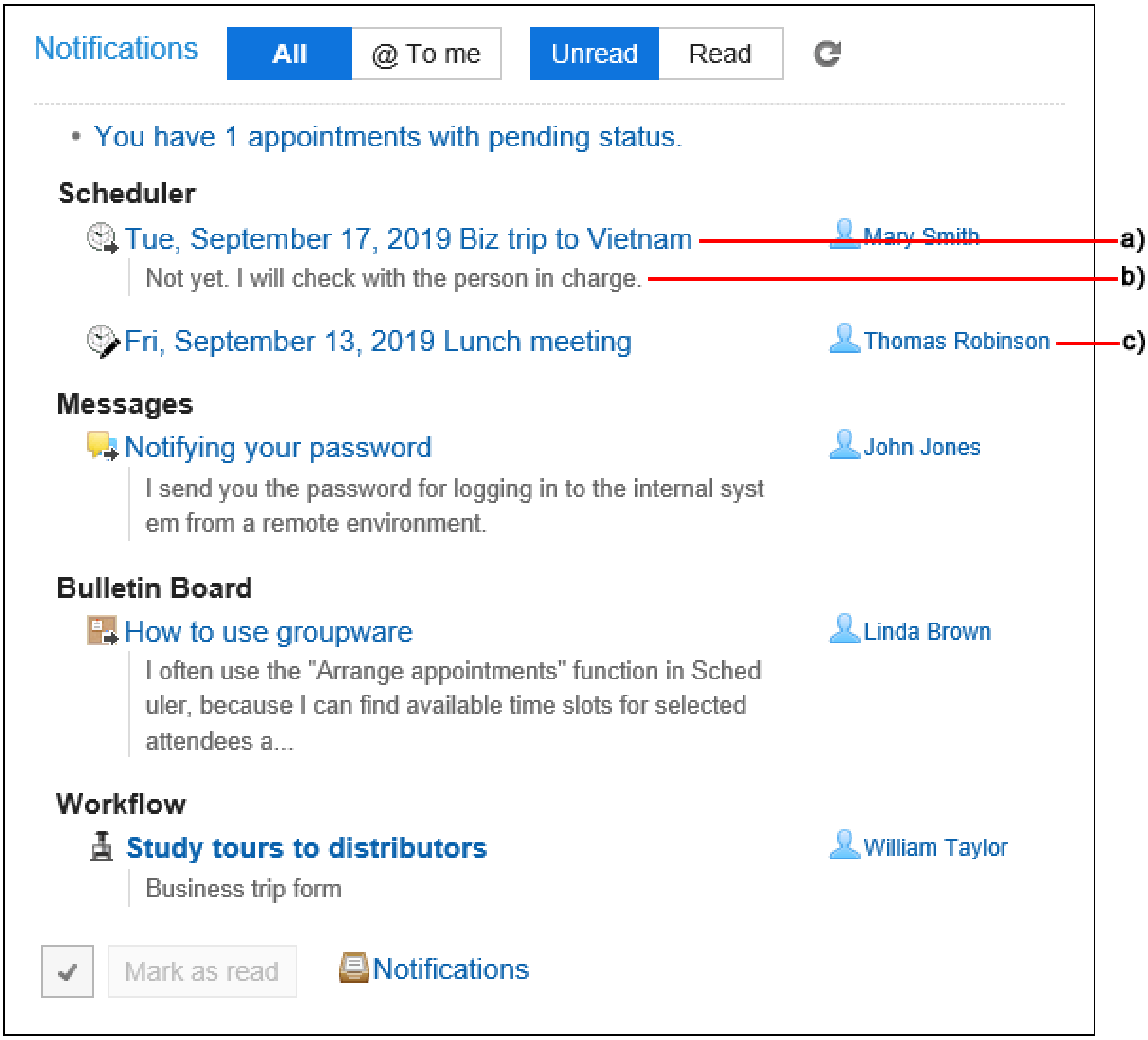
5. Click "Notifications portlet".

6. **On the "Notifications portlet" screen, you can set the default values for items to show and its numbers to show.**

- Default settings for display items:
  For notifications for all applications, select the check boxes of the items to display.
  The following items can be selected: You cannot hide the Subject.
  - Contents
  - Name
  - On
- Default settings for numbers to display items:
  Specify the number of notifications to show per application.
  You can select one of the following numbers:
  - 0
  - 5
  - 10
  - 15
  - 20



Example for selecting "Contents" and "Name" fields to show:



a): Subject

b): Contents

c): Name

7. Confirm your settings and click "Save".

2.18.4. Default Settings in "Read notifications" Portlet

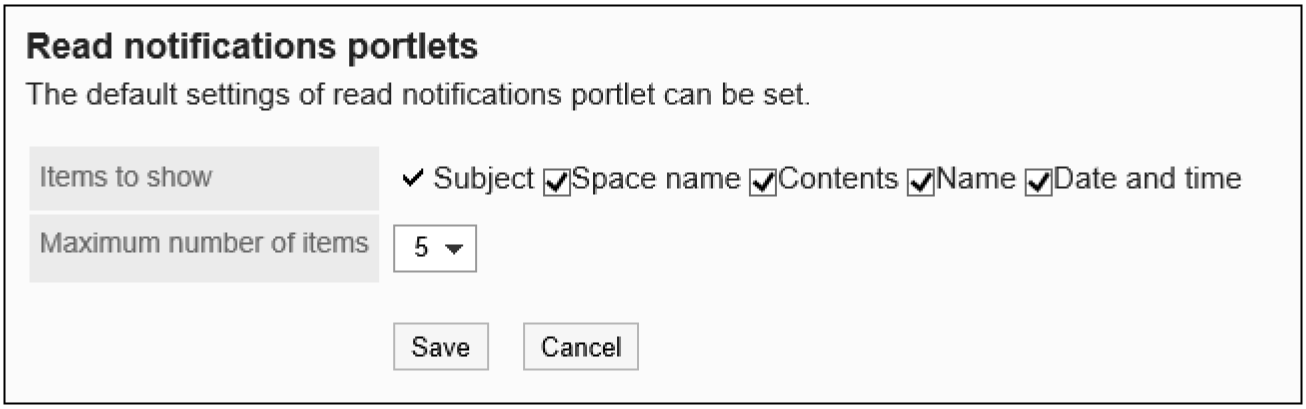
Set the default value of items displayed in Read notifications portlets and the number of notifications to be displayed. This default value is applied when you deploy Read notifications portlets in portals.

Note

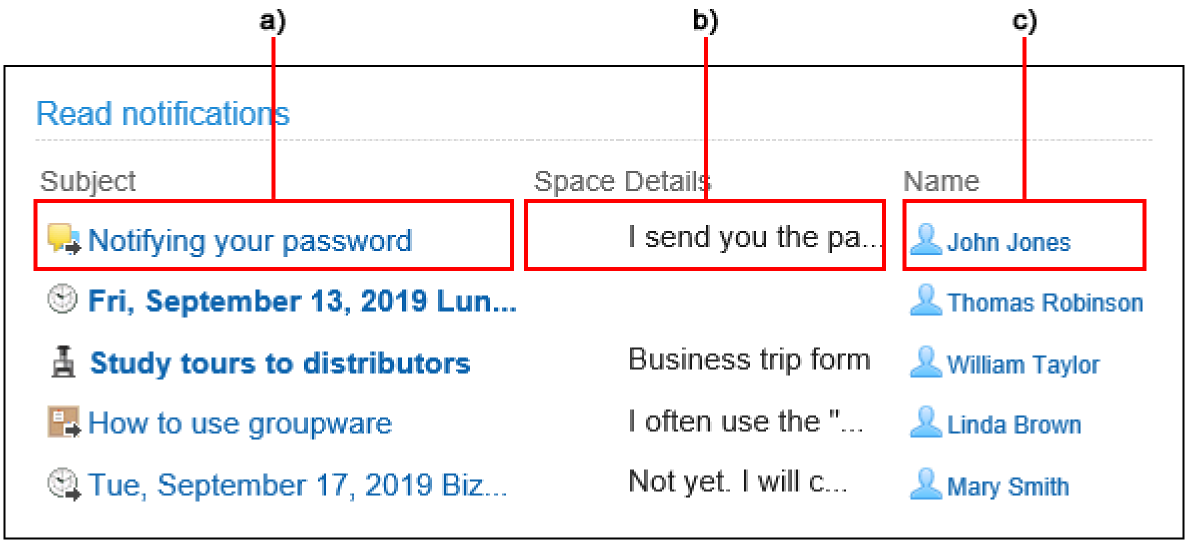
- When you change the settings for Read notifications portlets, refer to the procedure in Changing Portlet Configurations(662Page).

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Notifications".**
5. **Click Read notifications portlet.**
6. **On the screen for Read notifications portlet, you can set the default values for items to show and its numbers to show.**
   - Default settings for display items:
     For notifications for all applications, select the check boxes of the items to display.
     The following items can be selected: You cannot hide the Subject.
     - Space
       This is applied only for spaces.
     - Contents
     - Name
     - On
   - Default settings for numbers to display items:
     Specify the number of notifications to display. You can select one of the following numbers:
     - 0
     - 5
     - 10
     - 15
     - 20



Example for selecting "Contents" and "Name" fields to show:



a): Subject

b): Contents

c): Name

7. Confirm your settings and click "Save".

2.18.5. Settings for External Notifications

External notifications is a feature to display notifications, sent from systems other than Garoon, in "Notifications list" portlet and "Notifications list" screen.

Note

- To secure the system operation and management, it is recommended that you should set only notifications sent from trusted systems as external notifications.

Image of External Notifications through API

For details, refer to Settings for External Notifications Through API(1620Page).

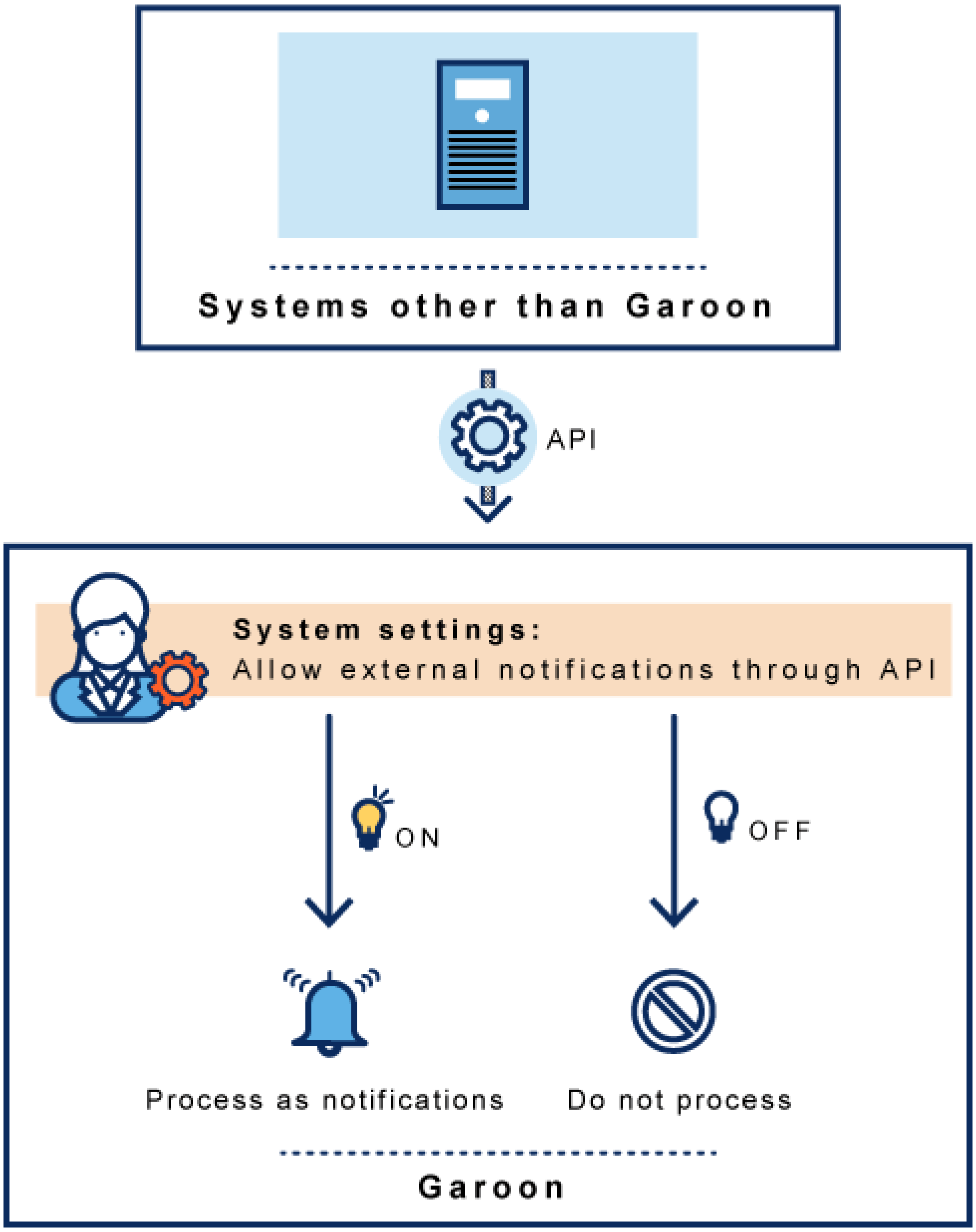
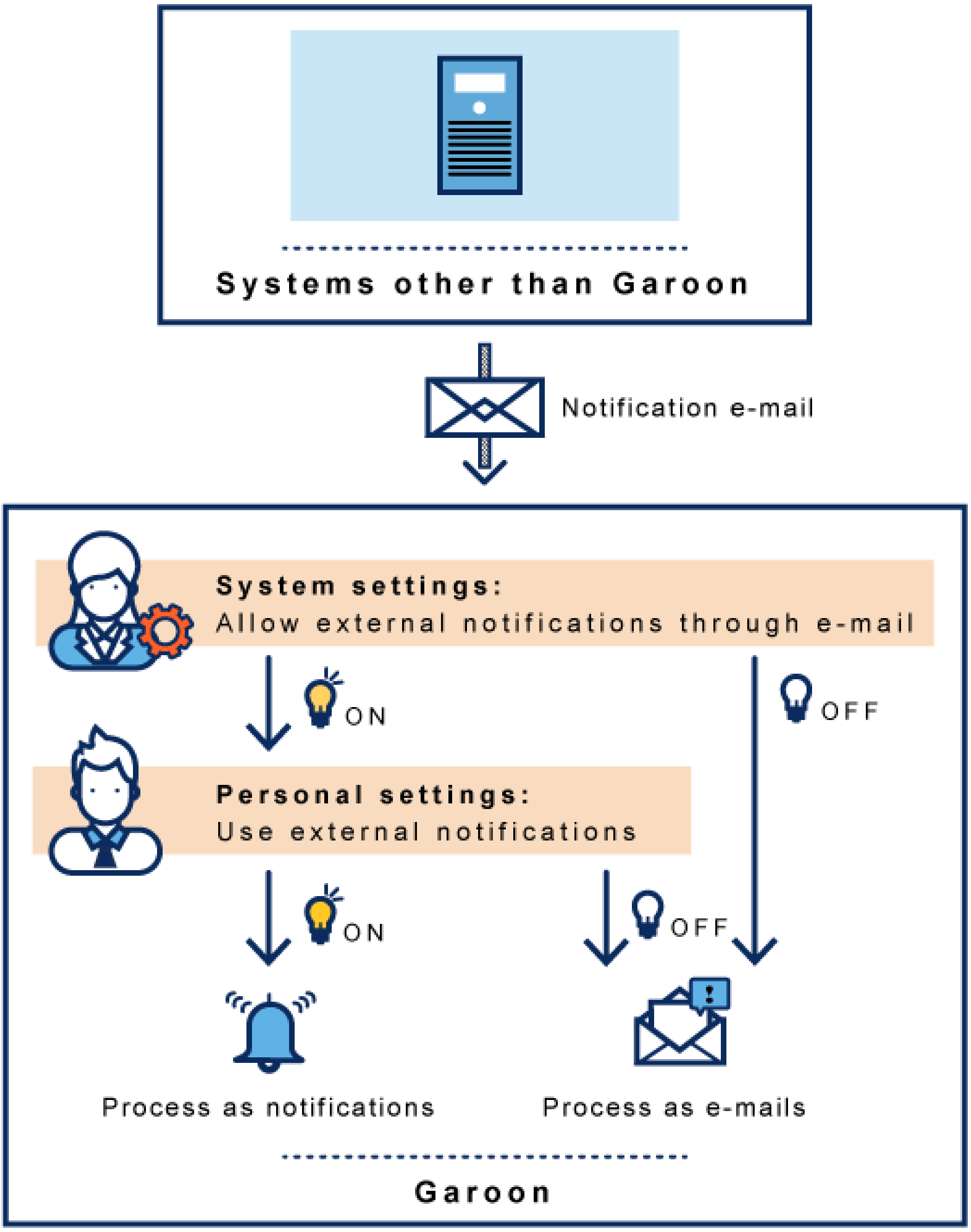


Image of External Notifications through E-Mail

For details, refer to Settings for External Notifications through E-Mail(1627Page).



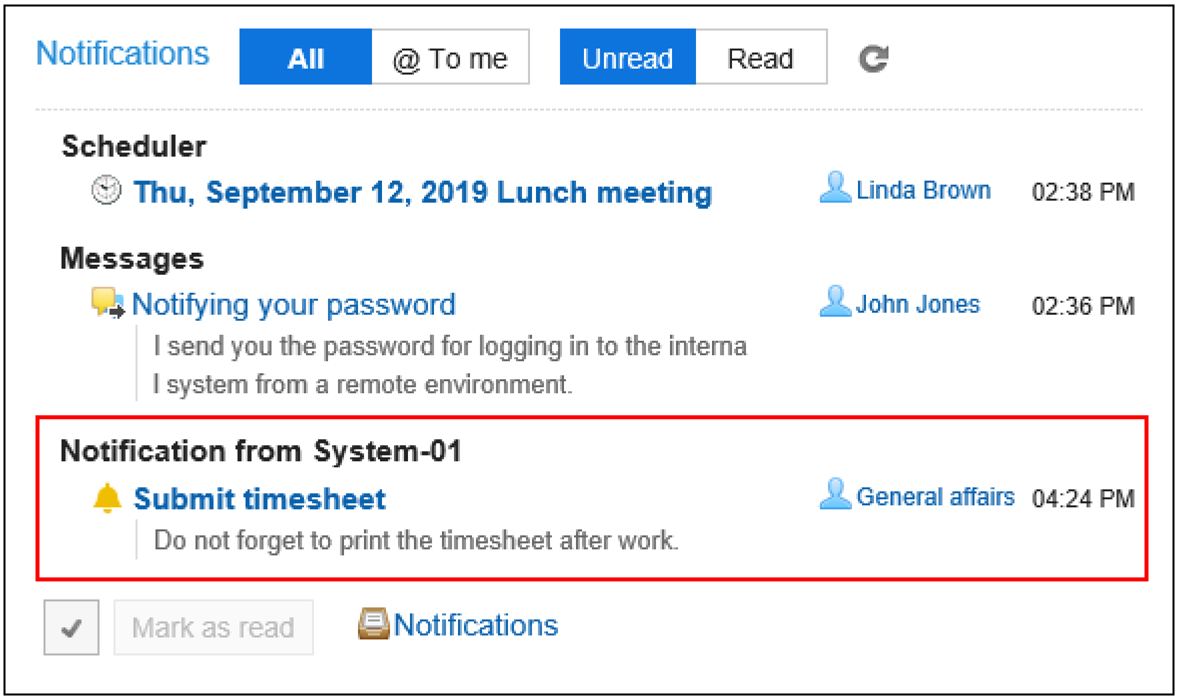
2.18.6. Allowing External Notifications through API

This section describes how to configure external notifications through API.

This setting is necessary to process notifications through API sent from systems other than Garoon.

Received notifications are displayed in "Notifications list" portlet and "Notifications list" screen.

Notifications are not displayed if settings for external notifications through API and values of notification data sent from API do not match.



Caution

- For details on API specifications and the way to use it, refer to the instruction page on cybozu developer network.
- For details on the API specifications, contact the Garoon API support page from the inquiry form on the "Product site support".
- If you find it difficult to develop programs using languages such as JavaScript with API by yourself, contact Cybozu official partners.
  Partners can be searched in the partner list of the product site.

Adding External Notifications through API

You can add external notifications through API.

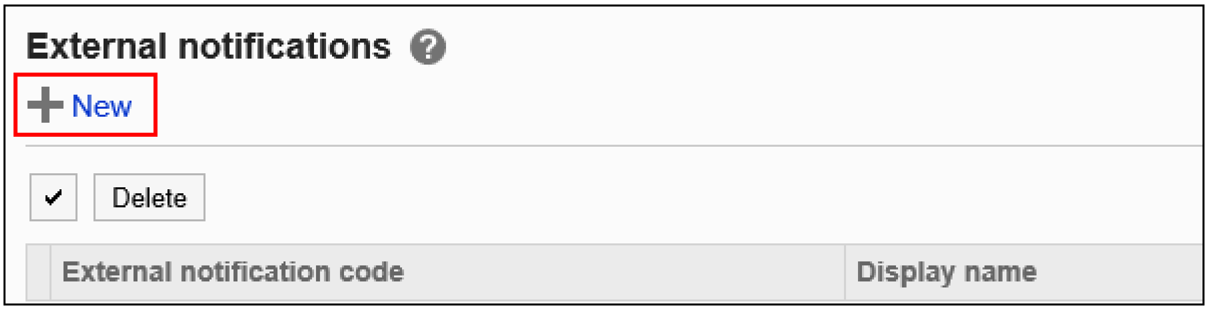
Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**

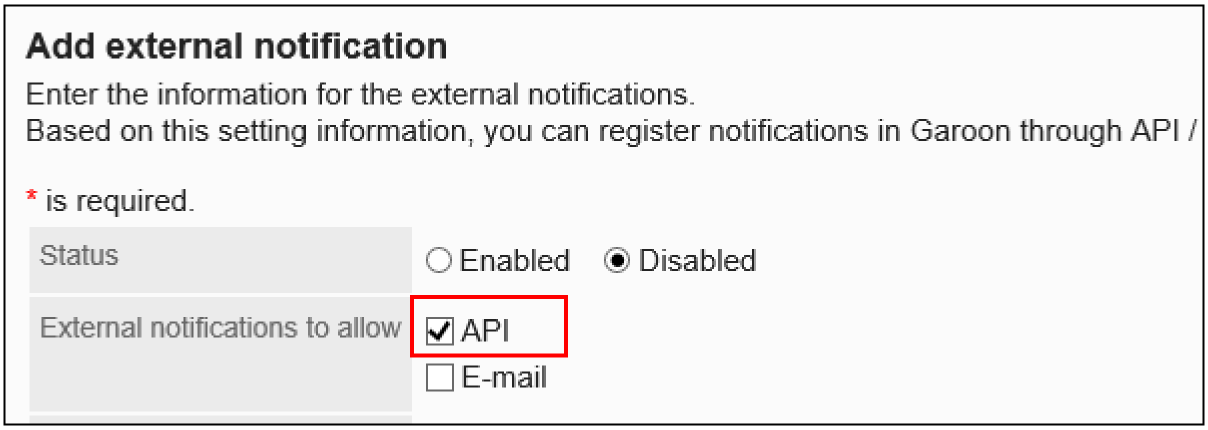
4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, click "New".**



7. **Select "API" check box for "External notifications to allow" field in "Add external notification" screen.**



8. **Enter an item in "External notification Code" field.**

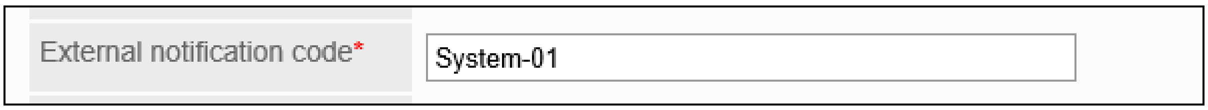
This external notification code is mandatory. This is a unique code for identifying external notifications.

You can configure any value to the external notification code. However, there is a limitation on the maximum number of characters to be used.

For details, refer to the "Adding external notifications(2101Page)" section under the list of the allowed number of input characters.

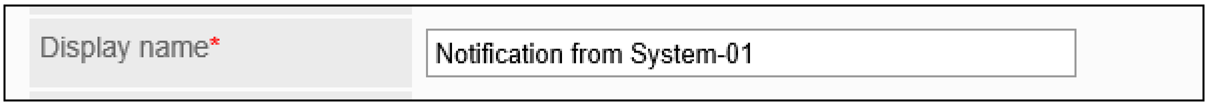
The external notification code configured for API requests and for Garoon must be the same.

For details on API requests, refer to the topic on registering notification (POST) in cybozu developer network.

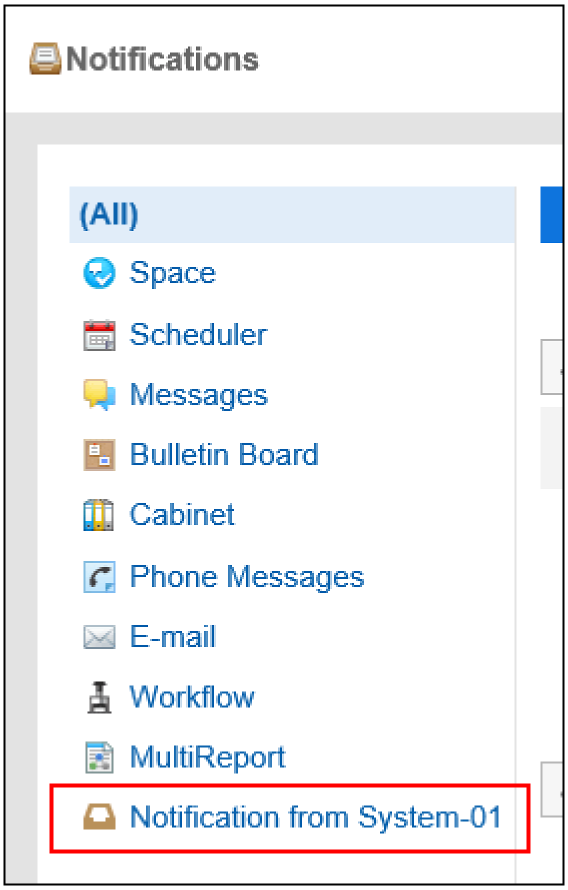


9. **Input a display name of external notification in "Display name" field.**

The name is mandatory.



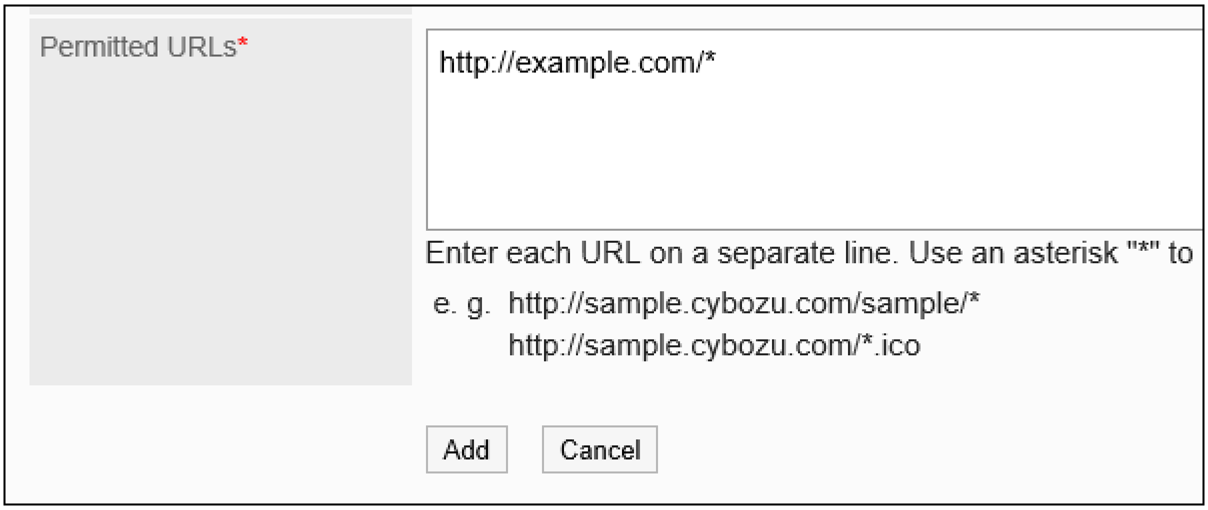
This display name is used as an application name displayed in "Notifications list" portlet and "Notifications list" screen.



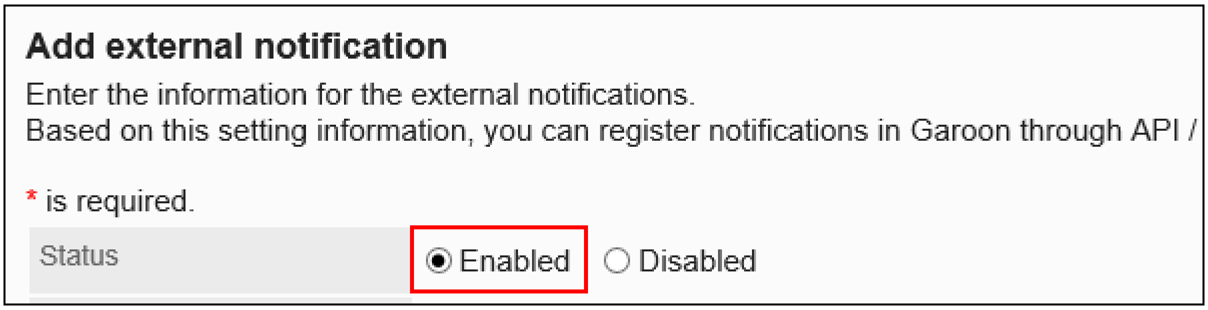
10. In "Permitted URLs" field, input link URLs for notifications.

You must input all URLs which you want to permit.
Enter each URL on a separate line. You can use a wildcard character "*".
You can also specify URLs for notification icons. If omitted, the build-in bell icon  for external notifications through API is configured as a notification icon.

If you have configured the URL such as "URL included in a notification" and "notification icon" in the API request, make sure you enter them in the "Permitted URLs" field in Garoon.
For details on API requests, refer to the topic on registering notification (POST) in cybozu developer network.



11. **Select "Enabled" for "Status" field.**



12. **Confirm your settings and click "Add".**

Changing External Notifications through API

You can edit settings of external notifications through API.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

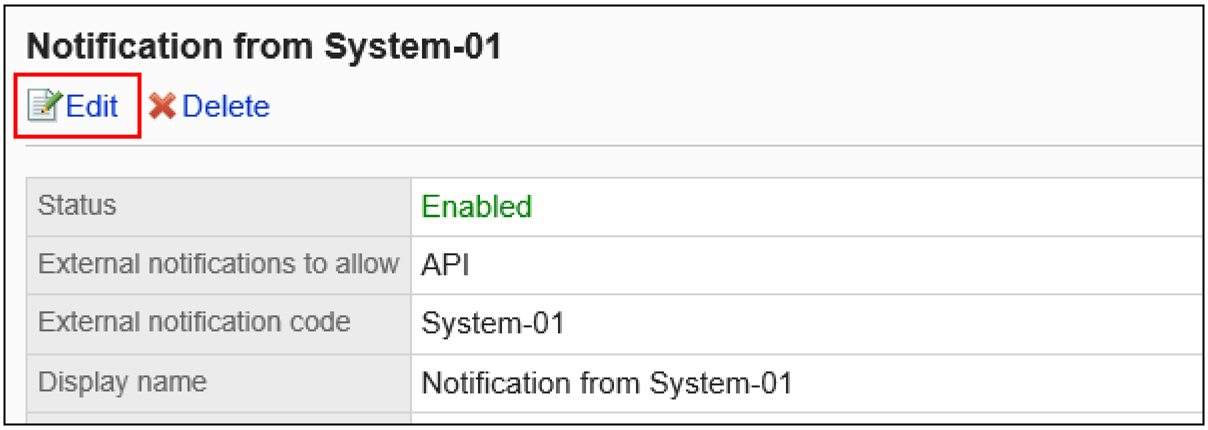
3. **Select "Application settings" tab.**

4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, click the external notification (through API) code which you want to edit.**

7. **In "External notification details" screen, click "Edit".**



8. **In "Edit external notification" screen, configure necessary items.**

9. **Confirm your settings and click "Save".**

Deleting External Notifications through API

You can delete external notifications through API.
Even if you delete the configuration of external notifications through API, notifications which you have already received are not deleted. However, once you deleted, you cannot filter notifications in "Notifications list" portlet and "Notifications list" screen.

Caution

- You cannot restore external notifications through API once you deleted.

Deleting External Notifications through API One by One

You can delete external notifications through API one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

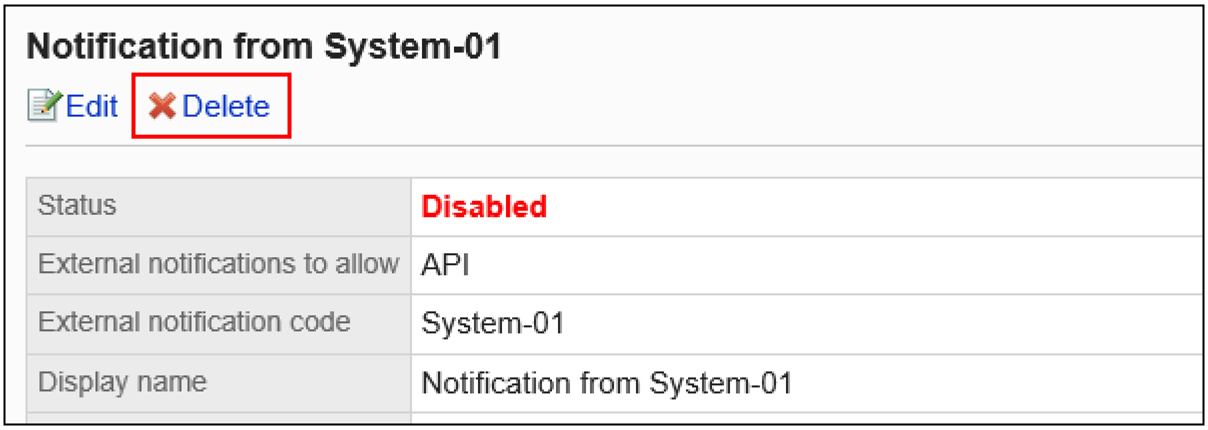
3. **Select "Application settings" tab.**

4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, click the external notification (through API) code which you want to delete.**

7. **In "External notification details" screen, click "Delete".**



8. **Click "Yes" in the "Delete external notification" screen.**

Deleting Multiple External Notifications through API in Bulk

You can select multiple external notifications through API and delete them in bulk.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

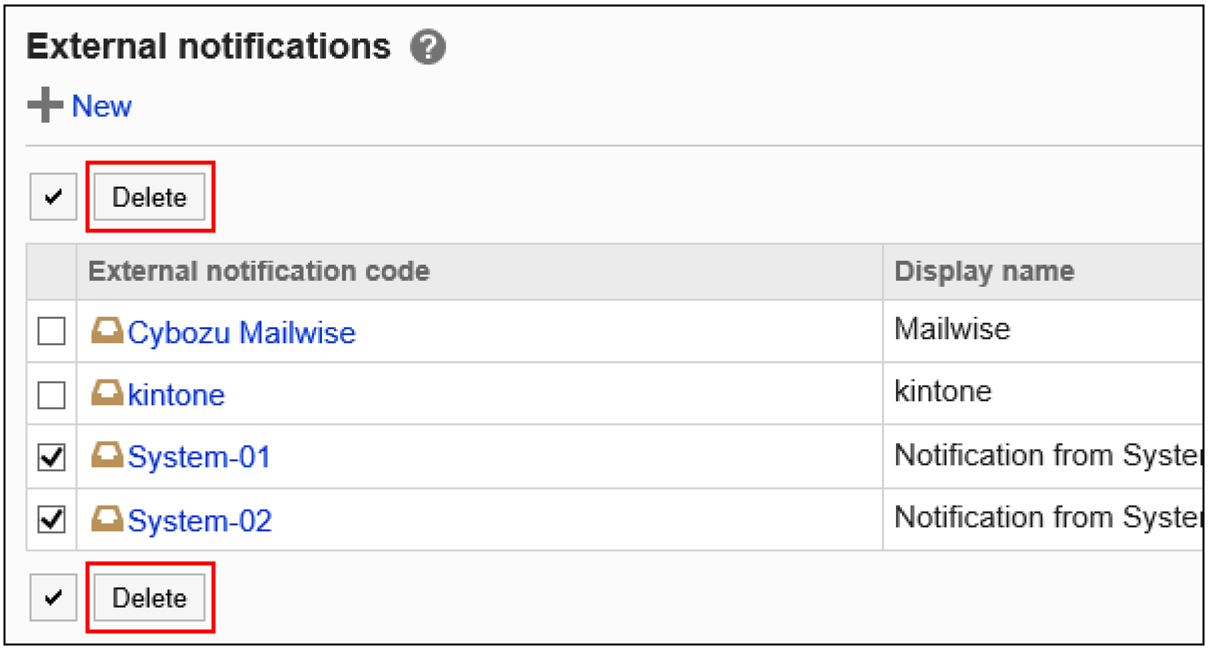
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, select check boxes of external notifications through API which you want to delete and click "Delete".**



7. Click "Yes" in the "Bulk deletion of external notifications" screen.

2.18.7. Settings for External Notifications through E-Mail

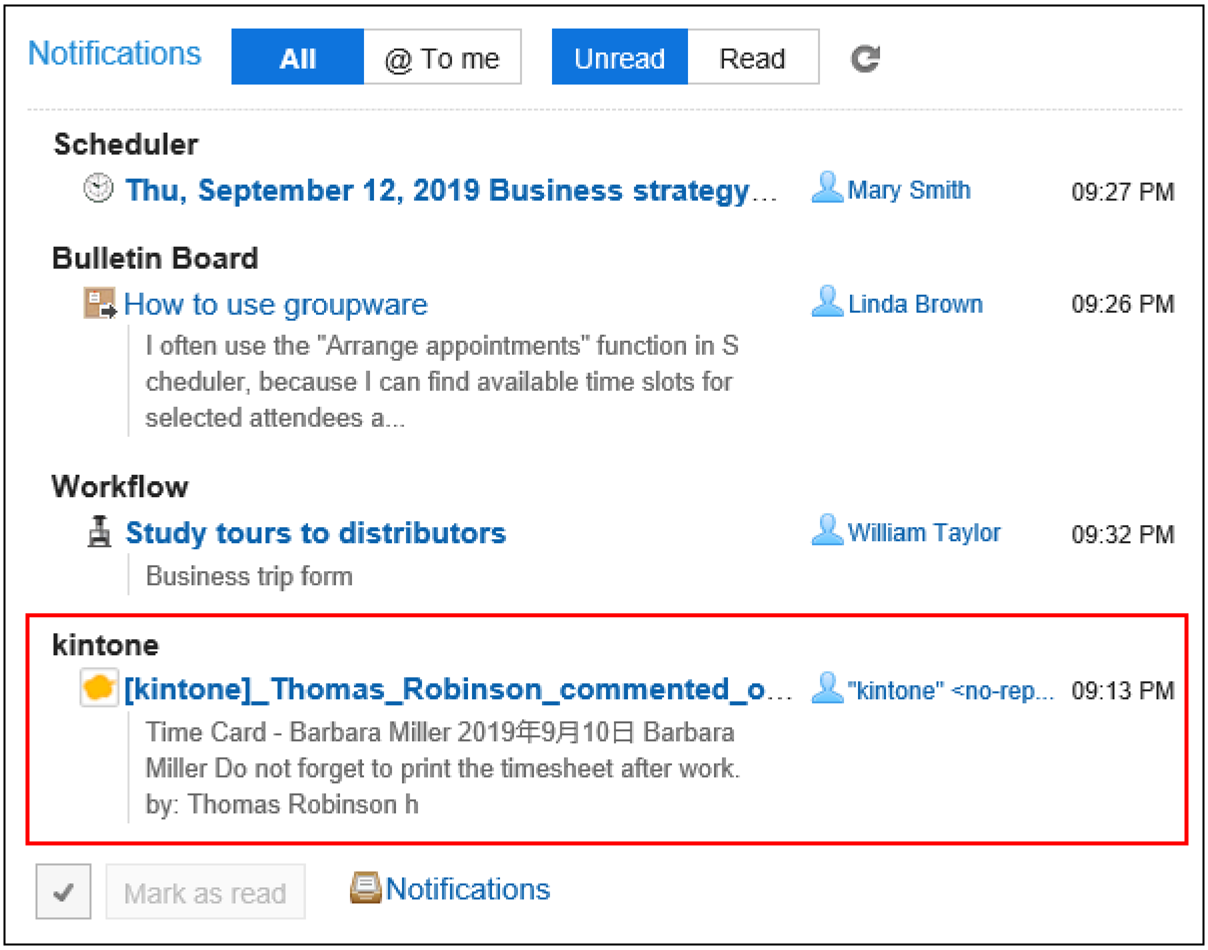
This section describes how to configure external notifications through e-mail.

This setting is necessary to process notification e-mails, which are sent from systems other than Garoon, as notifications.

This setting is for Garoon to ensure that notification e-mails, which are sent from systems other than Garoon, are sent from trusted systems.

When notification e-mails are received, a message "Received n external notifications" shown in the "E-mail" screen.

Received notifications are displayed in "Notifications list" portlet and "Notifications list" screen. External notifications are not displayed in "E-mail" screen.



Notification e-mails are processed as e-mails in the following cases:

- You have not configured external notifications through e-mail.
- Information configured for external notifications through e-mail and header information of notification e-mails do not match.
- Users have configured not to use external notifications.

Caution

- External notifications through e-mail use an e-mail feature.
  Before configuring external notifications through e-mail, confirm the following prerequisites:
  - E-mail is available.
  - E-mail accounts have been registered for users who receive notifications.

Adding External Notifications through E-Mail

You can add external notifications through e-mail.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

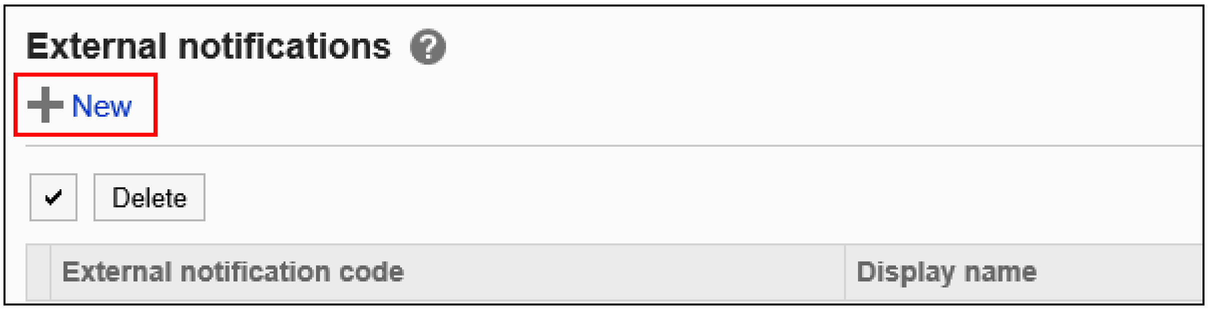
2. **Click "System settings".**

3. **Select "Application settings" tab.**

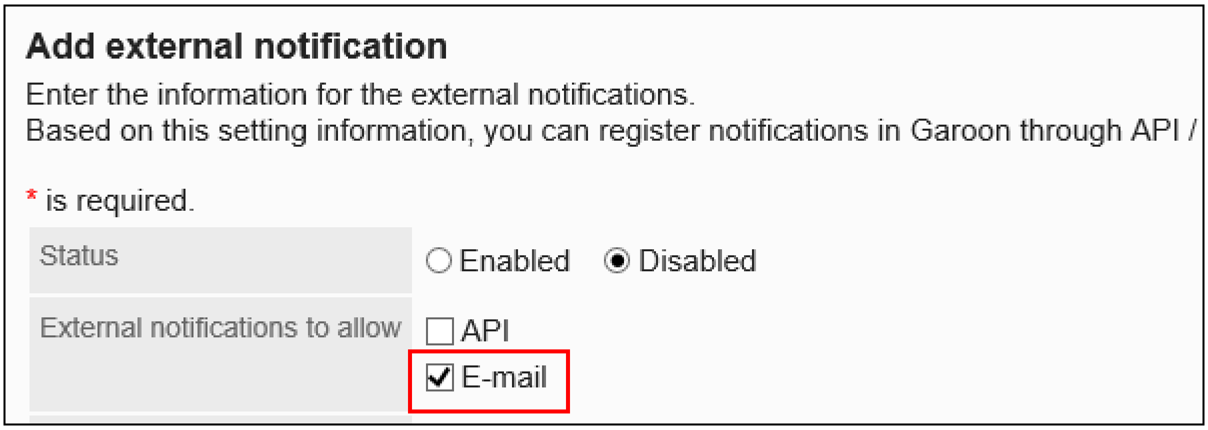
4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, click "New".**



7. **Select "E-mail" check box for "External notifications to allow" field in "Add external notification" screen.**



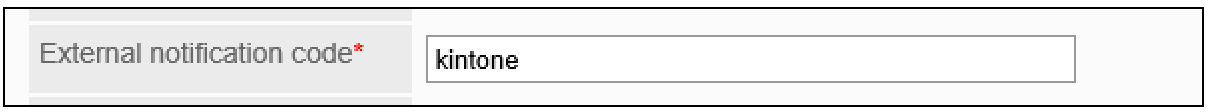
8. **Enter an item in "External notification Code" field.**

This external notification code is mandatory.

This is a unique code for identifying external notifications.

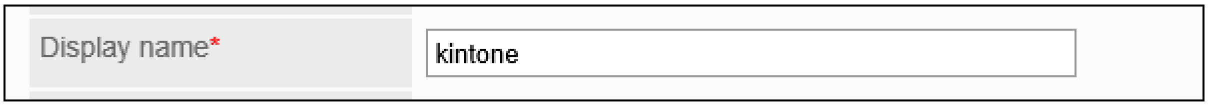
This code must match the string specified in "X-Cybozu-Notify-App-Name" header of notification e-mails.

For details, refer to necessary headers to process external notifications through e-mail(1631Page).

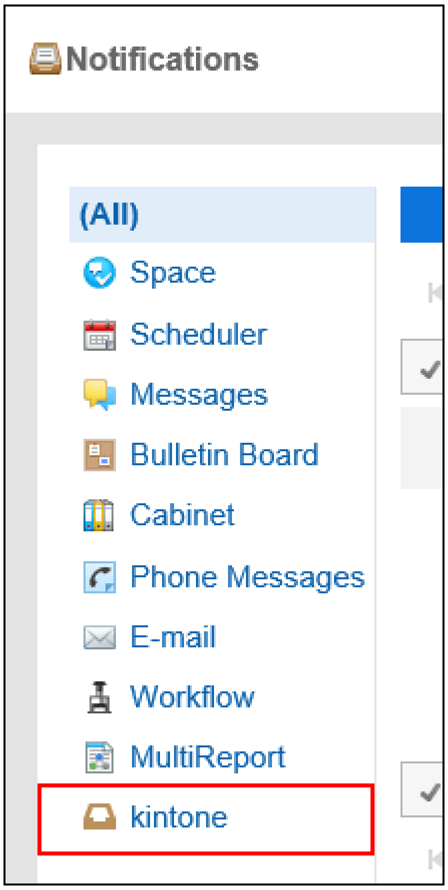


9. Input a display name of external notification in "Display name" field.

The name is mandatory.



This display name is used as an application name displayed in "Notifications list" portlet and "Notifications list" screen.



10. In "Permitted URLs" field, input link URLs for notifications.

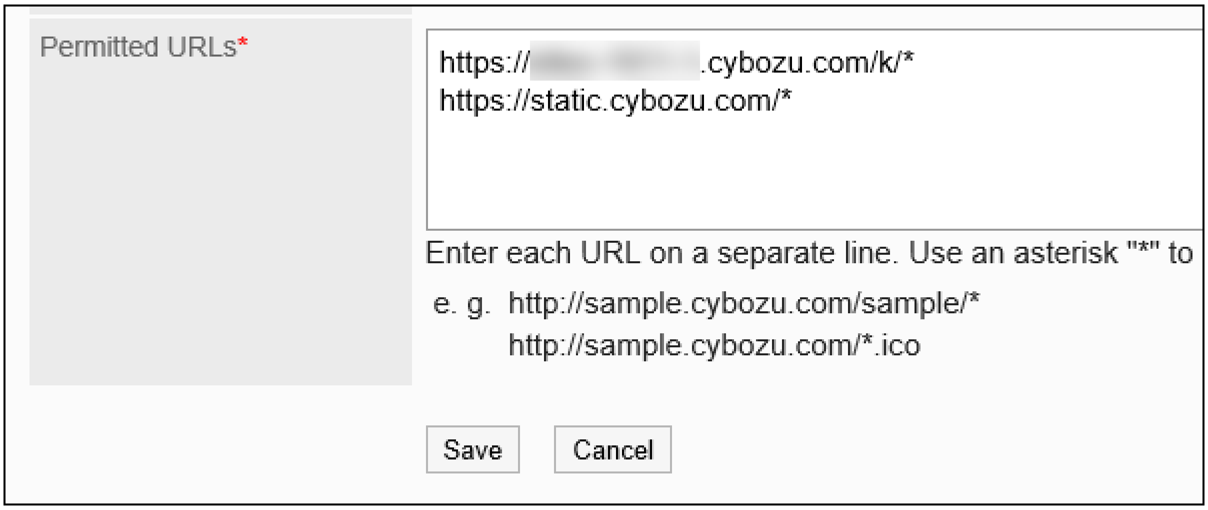
You must input all URLs which you want to permit.

Enter each URL on a separate line. You can use a wildcard character "*".

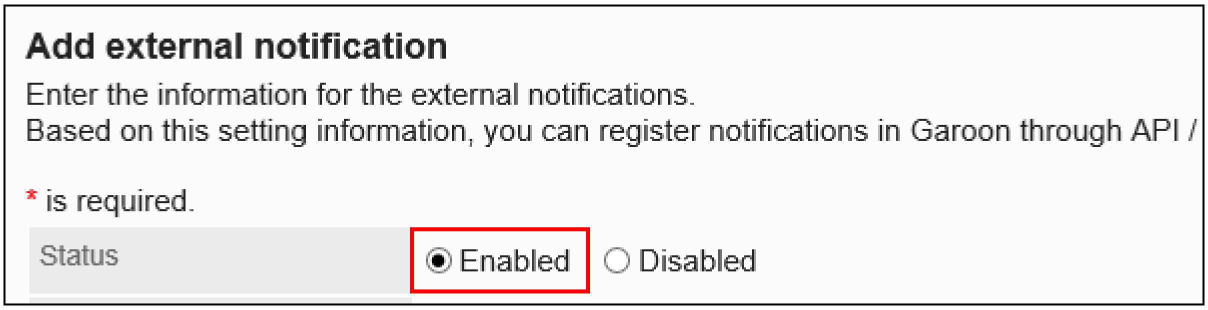
This code must match the string specified in "X-Cybozu-Notify-App-URL" header of notification e-mails.

When you set a notification icon, enter the URL for the notification icon.

For details, refer to necessary headers to process external notifications through e-mail(1631Page).



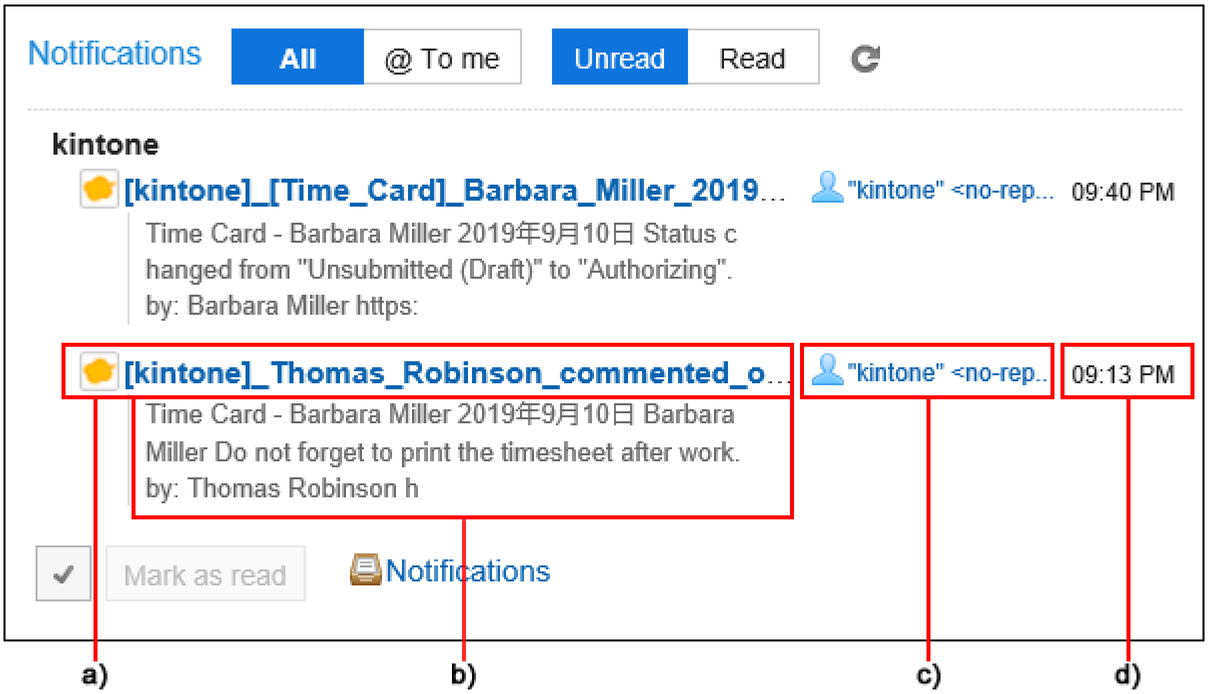
11. Select "Enabled" for "Status" field.



12. Confirm your settings and click "Add".

Necessary Headers to Process External Notifications through E-Mail

In case of external notifications through e-mail, information in notifications is displayed in "Notifications" screen and this is by design.



a): Subject

b): Contents

c): Sender name

d): Received date and time

The following information is set in the headers of notification e-mails sent from systems other than Garoon. "X-Cybozu-Notify-App-Name" and "X-Cybozu-Notify-App-URL" are mandatory. Be sure to set it as the above.

Header name	Short description	Description
X-Cybozu-Notify-App-Name	External notification code	Header to configure external notification codes. It is not necessary to distinguish single-byte and double-byte characters.
X-Cybozu-Notify-App-Ver	Production version	Header to configure product versions. Use this to control version information.
X-Cybozu-Notify-App-UniqueID	Identification (ID) of notifications	Header to configure identification (ID) of notifications. Identification (ID) of notifications is used to check duplicate notifications. If duplicate notifications are found, an older notification is overwritten with the latest one according to the sent date and time of e-mails (date/time of "X-Cybozu-Notify-Date" has precedence if it is set). If this header is omitted, the string set in "X-Cybozu-

Header name	Short description	Description
		Notify-App-URL" (target link URL) is used as identification (ID).
X-Cybozu-Notify-App-URL	Target link URL	Header to configure target link URLs of notifications. If "X-Cybozu-Notify-App-UniqueID" is not set in notification e-mails, the string configure in this header is used as identification (ID). In that case, any string after "#" is ignored.
X-Cybozu-Notify-Date	Received date and time	Header to configure received date and time. This is used to compare notifications to determine the most recent one. If notifications with duplicate identification (ID) are already displayed as recent information, the most recent notification has precedence. If this header is omitted, "Date" in e-mail header is used as received date and time.
X-Cybozu-Notify-Name	Sender name	Header to configure sender names of notifications. If this header is omitted, "From" in e-mail header is used as sender names of notifications.
X-Cybozu-Notify-Subject	Subject	Header to configure subjects of notifications. If this header is omitted, "Subject" in e-mail header is used as subjects of notifications.
X-Cybozu-Notify-Abstract	Contents	Header to configure contents of notifications. If this header is omitted, e-mail body is used as contents of notifications.
X-Cybozu-Notify-Version	Version of notification e-mail	Header to configure versions of notifications.
X-Cybozu-Notify-Icon-URL	Icon URL	URL for the icons of notifications. If omitted, build-in globe icon for external notifications through e-mail is specified as the notification icon. If you create a new icon, it is recommended to use a "20x20" icon size.

Format of Notification E-Mail

Use the following format to configure notification e-mails sent from systems other than Garoon.

Item	Value
Content-Type	text/plain
charset	JIS (iso-2022-jp), us-ascii
Content-Transfer-Encoding	7bit, base64, quote-printable

Settings by Users

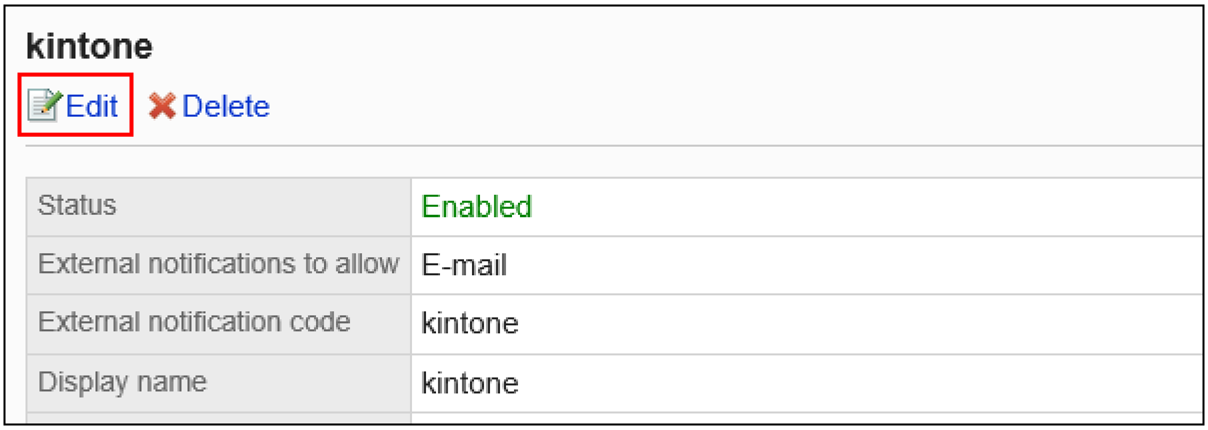
Users configure how to process external notifications through e-mail.
Notification e-mails sent from systems other than Garoon are processed as notifications by default.
If you want to process external notifications through e-mail as e-mails, ask users to edit their settings. For details, refer to Using external notifications.

Changing External Notifications through E-Mail

Editing settings of external notifications through e-mail.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Notifications".**
5. **Click "External notifications".**
6. **In "External notifications" screen, click the external notification (through e-mail) code which you want to edit.**
7. **In "External notification details" screen, click "Edit".**



8. **In "Edit external notification" screen, configure necessary items.**

9. **Confirm your settings and click "Save".**

Deleting External Notifications through E-Mail

You can delete external notifications through e-mail.
Once you delete external notifications through e-mail, notification e-mails sent from systems other than Garoon are processed as e-mails.
Even if you delete the configuration of external notifications through e-mail, notifications which you have already received are not deleted. However, once you deleted, you cannot filter notifications in "Notifications list" portlet and "Notifications list" screen.

Caution

- You cannot restore external notifications through e-mail once you deleted.

Deleting External Notifications through E-Mail One by One

You can delete external notifications through e-mail one by one.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

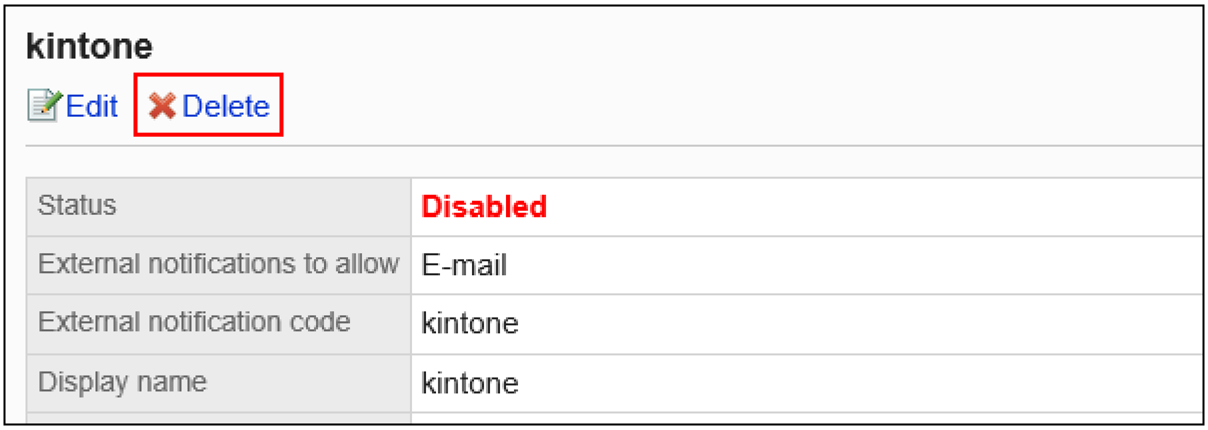
3. **Select "Application settings" tab.**

4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, click the external notification (through e-mail) code which you want to delete.**

7. **In "External notification details" screen, click "Delete".**



8. **Click "Yes" in the "Delete external notification" screen.**

Deleting Multiple External Notifications through E-Mail in Bulk

You can select multiple external notifications through e-mail and delete them in bulk.

Steps:

1. **Click the administration menu icon (gear icon) in the header.**

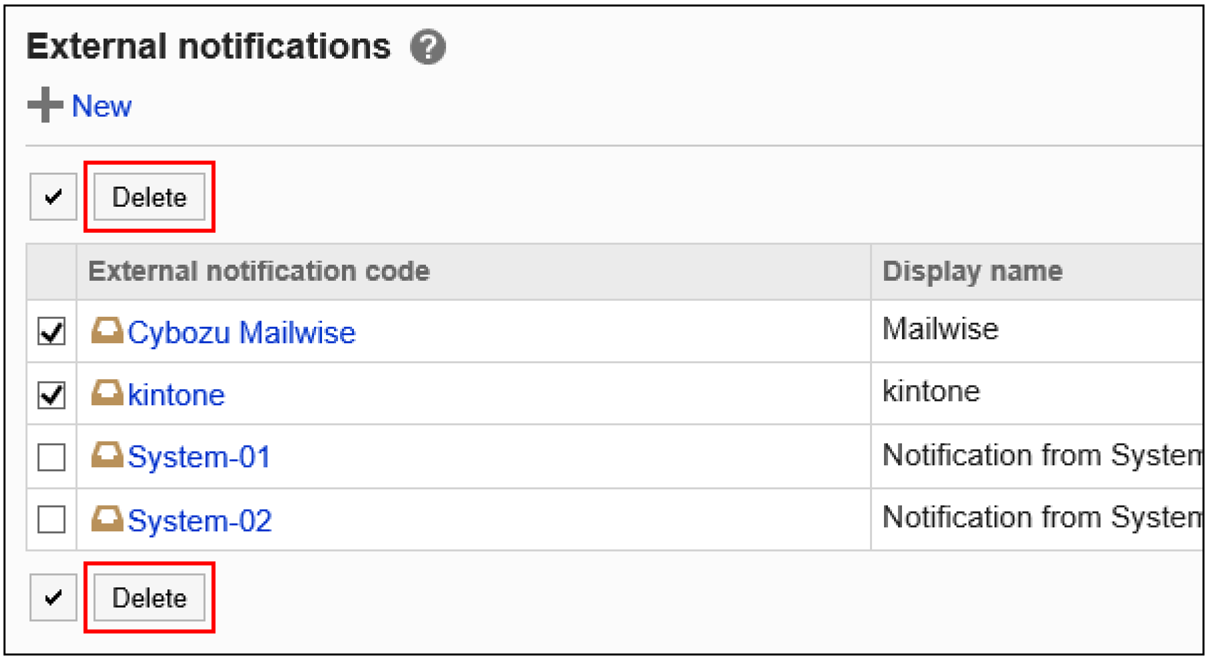
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Notifications".**

5. **Click "External notifications".**

6. **In "External notifications" screen, select check boxes of external notifications through E-Mail which you want to delete and click "Delete".**



7. Click "Yes" in the "Bulk deletion of external notifications" screen.

2.19. KUNAI

KUNAI is an application designed for using Cybozu services from smartphones.

You can access Garoon from iPhone devices or Android devices.

For details on how to set up and instructions, refer to Cybozu KUNAI guide.

This section describes settings required to use KUNAI for system administrators.

References

- Setting up User Permissions(1639Page)
- Differences between smartphone screens and KUNAI

2.19.1. General Settings for KUNAI

On "General settings" screen of KUNAI, you can limit the versions of KUNAI that users use.
System administrators can control applications made available to users in KUNAI.
However, this is not applicable for users using KUNAI earlier than version 2.1.0.
If you apply this control to all KUNAI users, you should prohibit the users using KUNAI earlier than version 2.1.0 to use KUNAI.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "KUNAI".**
5. **Click "General Settings".**
6. **On "General settings" screen, select "Prohibit use of KUNAI prior to version 2.1.0" check box for older version usage.**
   If you allow user to use applications, clear the check boxes.

7. **Confirm your settings and click "Save".**

2.19.2. Setting up User Permissions

You can set which applications are available to users in KUNAI for each organization, user, or role.
For example, you can allow a department manager who frequently has business trips to process requests from KUNAI, or prohibit the use of e-mails in KUNAI to reduce the workload on Garoon.
By default, all users can use all applications in KUNAI.

Note

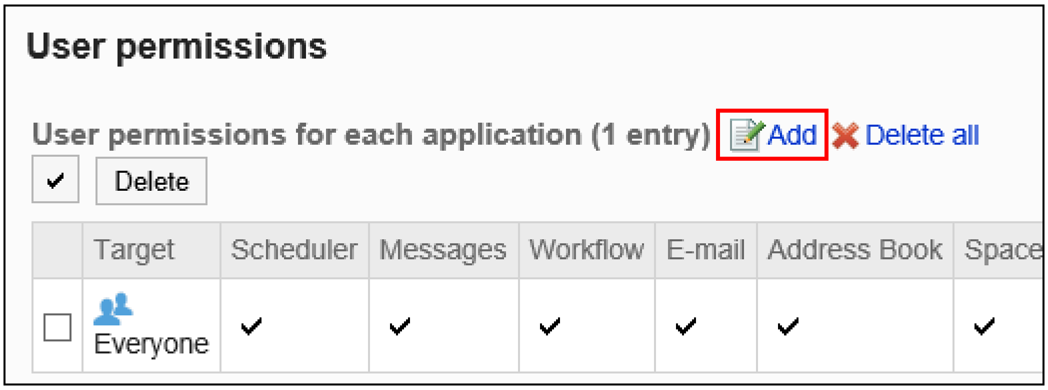
- Permission settings are applied when KUNAI is used in sync mode.
  If you use KUNAI in Mobile view mode, the following settings are applied:
  Limiting Application Users(213Page)
  Remote access rule(221Page)
  Mobile view mode is available if the system administrator allows the mobile view(248Page).
- Users can select applications from the applications that the system administrator allowed to use. In the personal settings in KUNAI, users can select applications to use for themselves.

Adding Permissions

Add permissions for applications to use KUNAI.

Steps:

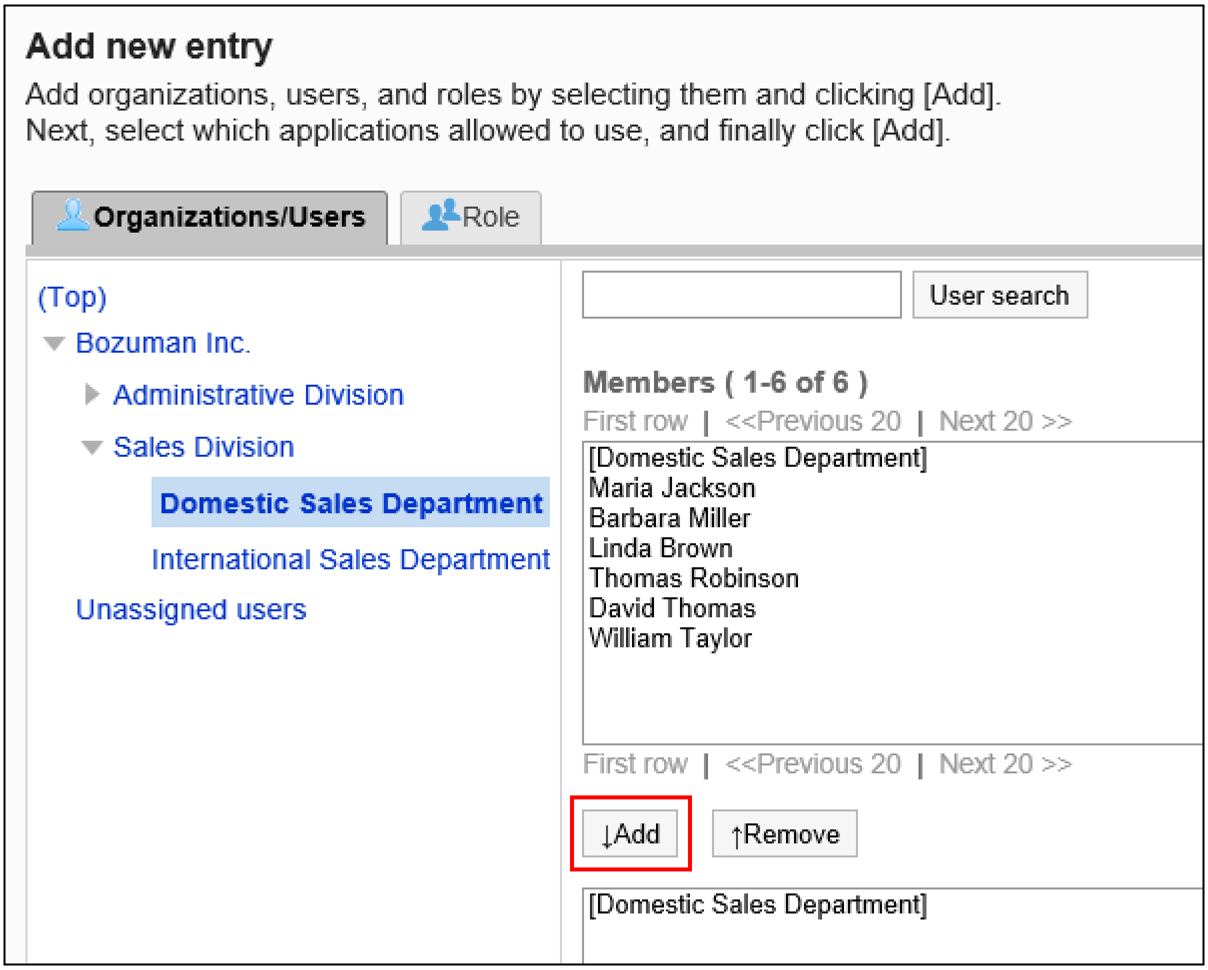
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "KUNAI".**
5. **Click "User Permissions".**
6. **On the "User Permissions" screen, click "Add".**



7. On the screen to add targets, select the department, user, or role to set permissions, and click "Add".

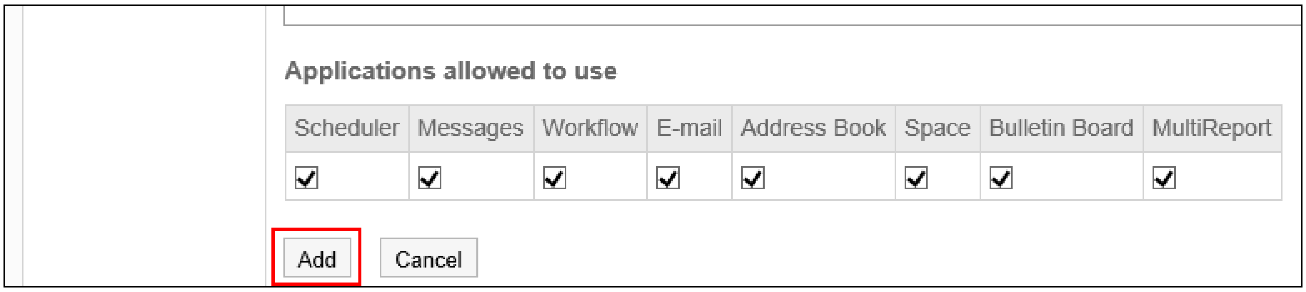
To select a role, switch the view to the Roles tab.

When you switch tabs after clicking "Add", the selected departments, users, or roles are deselected before you switch.



8. Select the check box of applications to allow to use in KUNAI.

Users cannot change the setting of the inactive applications. For details, refer to the "Using Applications(206Page)" section.



9. **Confirm your settings and click "Add".**

Permission That Takes Priority When More Than One Permissions Are Applied

When you set permissions for departments, users, and roles, multiple permissions can be set for one user. In this case, the permission allowing the use of applications overrides.

For example, if you set the following permissions, a user, Osamu Kimura who belong to "Domestic Sales Department" department and "Department manager" role can use schedulers, messages, and workflows.

Target	Scheduler	Messages	Workflow
Domestic Sales Department	✓		
Department manager		✓	✓
Osamu Kimura		✓	

✓ : Allow

Changing Permissions

Change applications to which you allow departments, users, or roles to use in KUNAI that you set permissions.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

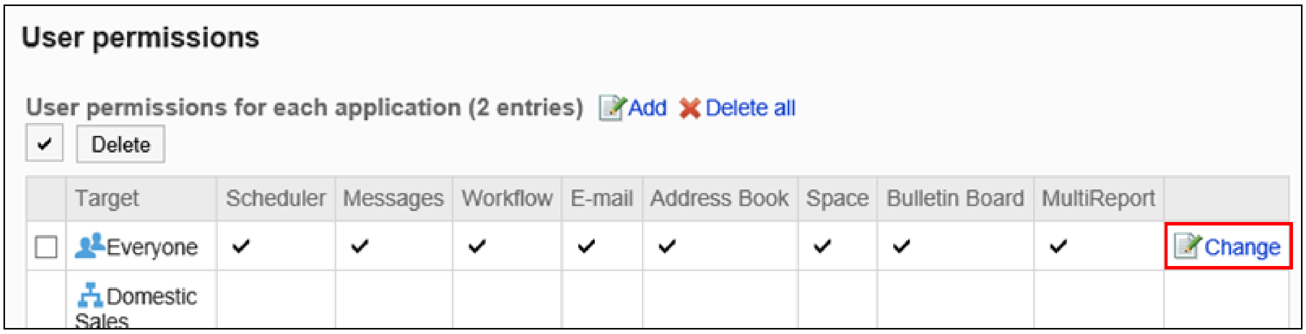
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "KUNAI".**

5. **Click "User Permissions".**

6. **On "User Permissions" screen, click "Change" for departments, users, or roles to change the permissions.**



7. **On the screen to change user permissions, select the check boxes for the applications to allow users to use in KUNAI.**

If you prohibit user to use applications, clear the check boxes.

8. **Confirm your settings and click "Save".**

Deleting Permissions

Delete permissions for applications using KUNAI.

Users who have been deleted the permission will not be able to use Garoon applications via KUNAI.

Caution

- After deleting permissions, they cannot be restored.

Selecting and Deleting Permissions

You can select permissions and delete them.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

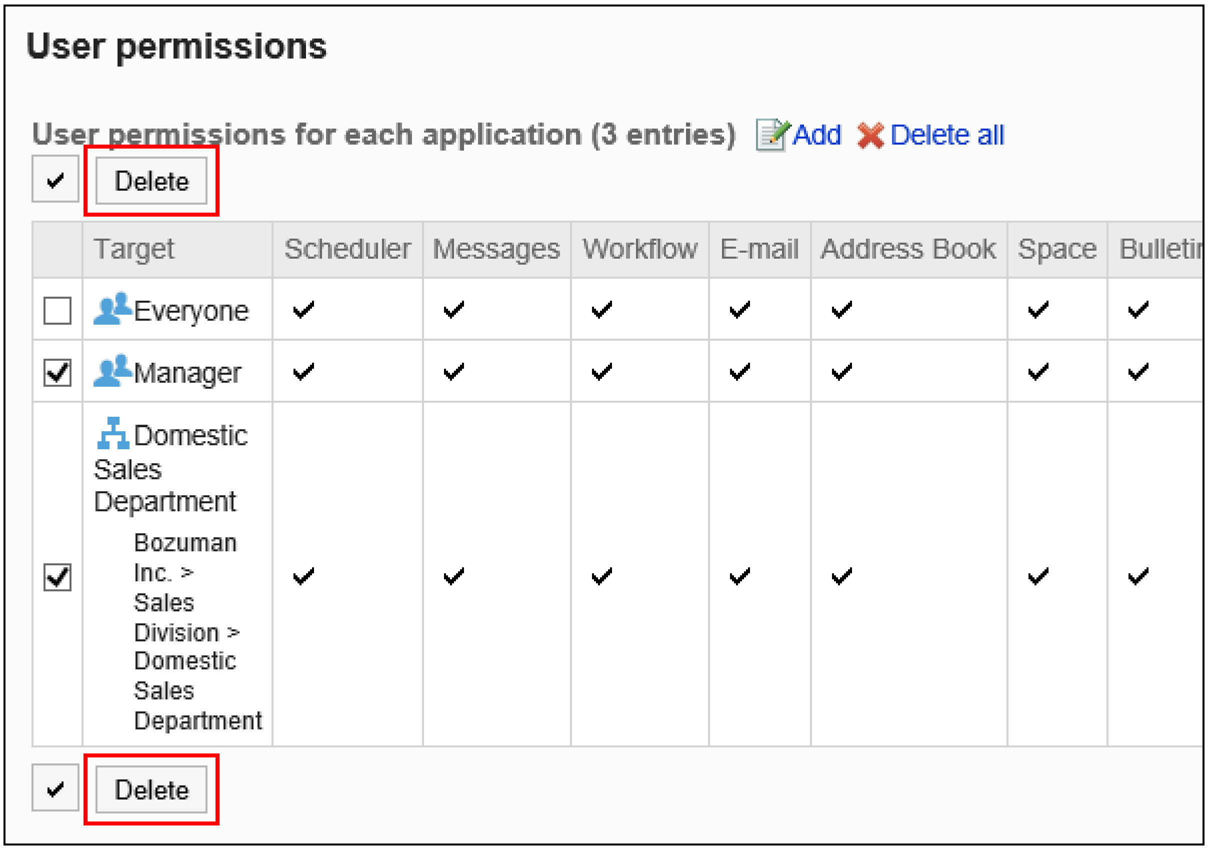
2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "KUNAI".**

5. **Click "User Permissions".**

6. **On "User Permissions" screen, select the check boxes for the departments, users, or roles to delete, and then click "Delete".**



7. **Click "Yes" on the delete targets screen.**

Deleting All Permissions

You can delete all permissions.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

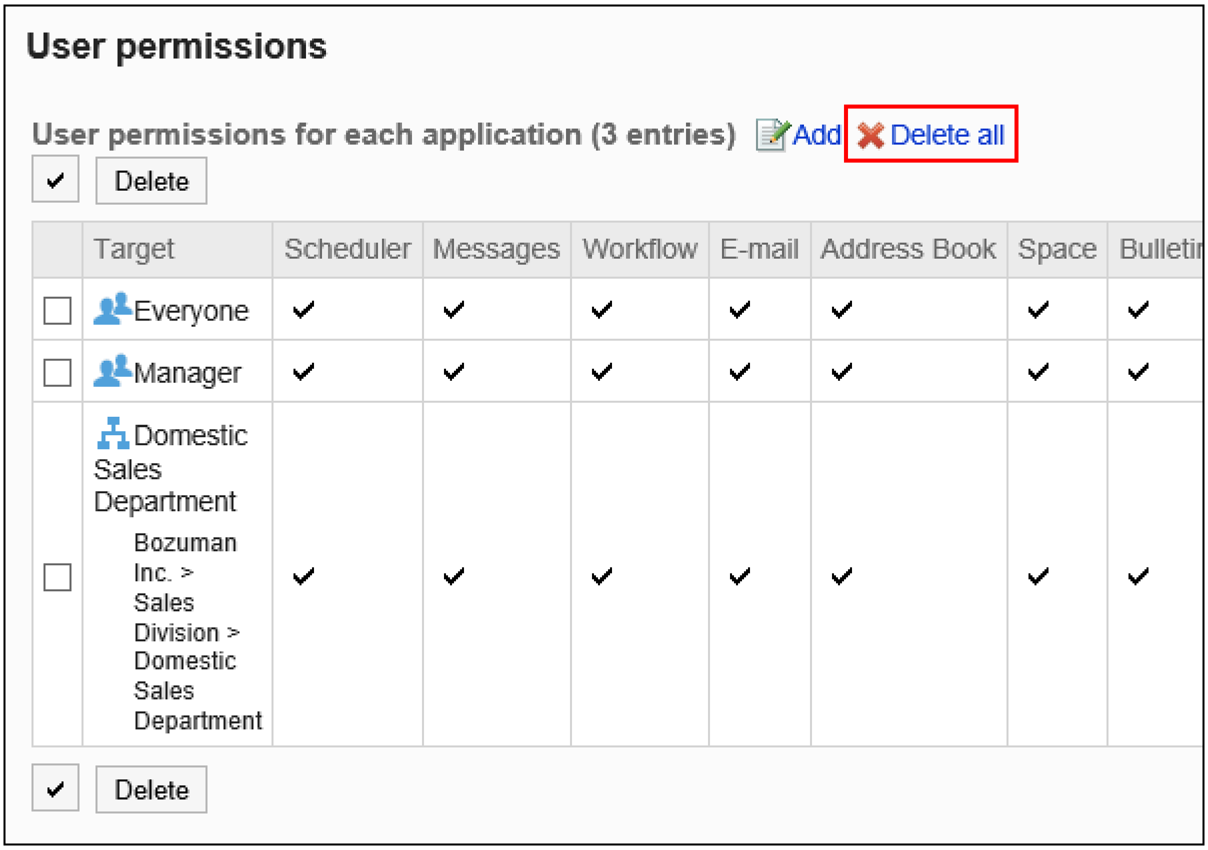
2. **Click "System settings".**

3. **Click the Application Administration tab.**

4. **Click "KUNAI".**

5. **Click "User Permissions".**

6. **On the "User Permissions" screen, click "Delete all".**



7. **Click "Yes" on the delete all targets screen.**

2.19.3. Managing Permissions Using CSV Files

You can use CSV files to manage applications that you allow users to use in KUNAI.

Importing Data from a CSV File

Import permissions from a CSV file.

If an error occurs while importing a CSV file, the import process will be terminated. The data which has been imported will be eliminated.

Steps:

1. **Create a CSV file to import data.**

   For information on items that can be managed using CSV files, refer to the CSV format in KUNAI(1911Page).

2. **Click the Administration menu icon (gear icon) in the header.**

3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "KUNAI".**

6. **Click the item to import permissions.**

7. **On the screen to import permissions step 1/2, select the CSV file created in step 1.**

8. **Set the required items for the data to import, and then click "Next".**

   The setting fields are as follows:

   - Character encoding:

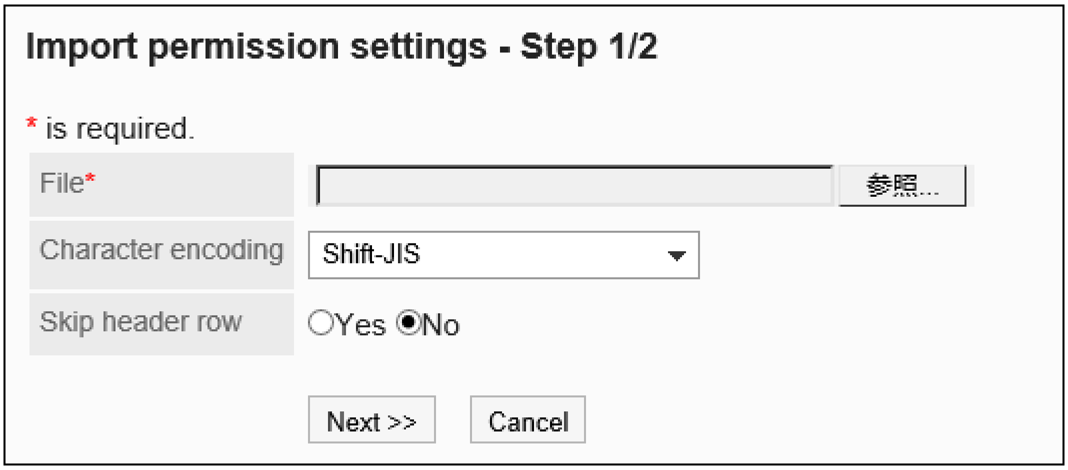
     Encodes data from a CSV file with the selected character code.

     The following character encoding can be selected:

     - Unicode (UTF-8)
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)
     - Thai (TIS-620)

   - Skip the first row:

     If the header row contains information other than data such as an item name and a comment, select "Yes".



9. **On the screen to import permissions step 2/2, confirm the contents in the CSV file, and then click "Import".**

Exporting Data to a CSV File

Export permissions to a CSV file.

Steps:

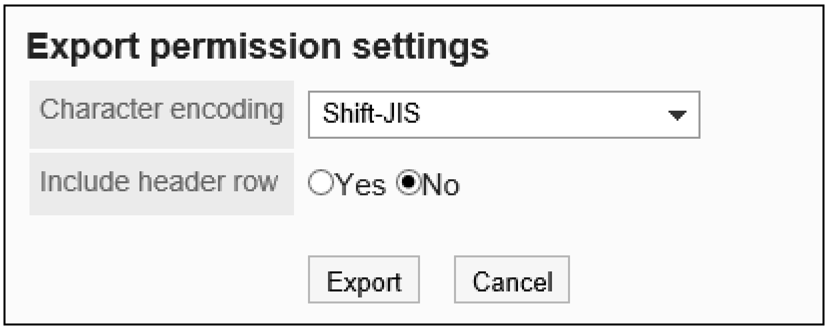
1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "KUNAI".**
5. **Click the item to export permissions.**
6. **On the screen to export permissions, set the required items to export data.**

   The setting fields are as follows:

   - Character encoding:
     Select the character code that you want to use for encoding.
     The following character encoding can be selected:
     - Unicode (UTF-8)
       You can select with BOM as required.
     - Japanese (Shift-JIS)
     - ASCII
     - Latin1 (ISO-8859-1)
     - Simplified Chinese (GB2312)

    - Thai (TIS-620)

- Include header row:
  To export an item name to the header row of a CSV file, select "Yes".



7. Check your settings and click "Export".

8. Save the file with a function provided by your Web browser.

2.20. Respond

By using the respond feature, you can make a quick response to the message content or any comments.
Users can show their intention by clicking a link such as "Like" and "Acknowledged" without posting any comment.
System administrators and the application administrators can allow users and applications to use the Respond feature .

Using Respond feature

The respond feature is available in the following applications:

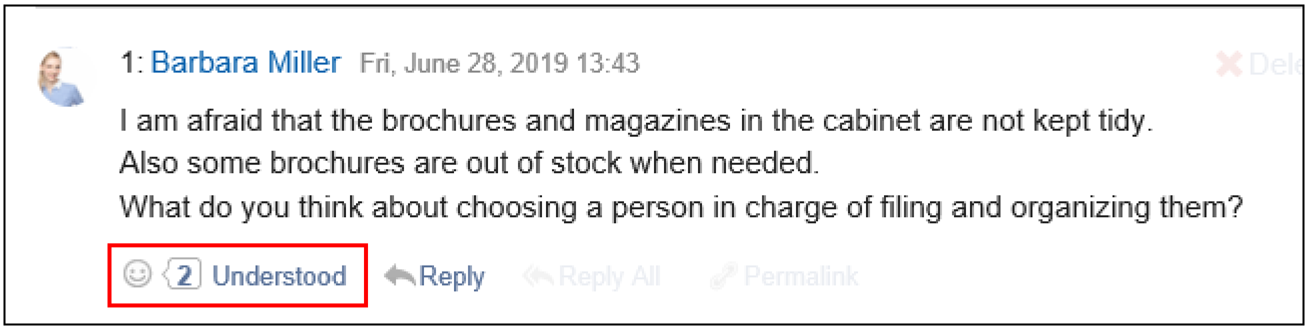
- Space:
  You cannot set whether to allow use of the Respond feature on Space. The Respond feature is always available if the feature is enabled.
- Scheduler:
  Available in Garoon version 5.9.0 or later.
- Messages
- Bulletin Board

For details on how to activate the Respond feature, refer to Using Applications(206Page).
For details on how to use the Respond feature, refer to Working with Respond Feature.

Changing the Label for "Like"

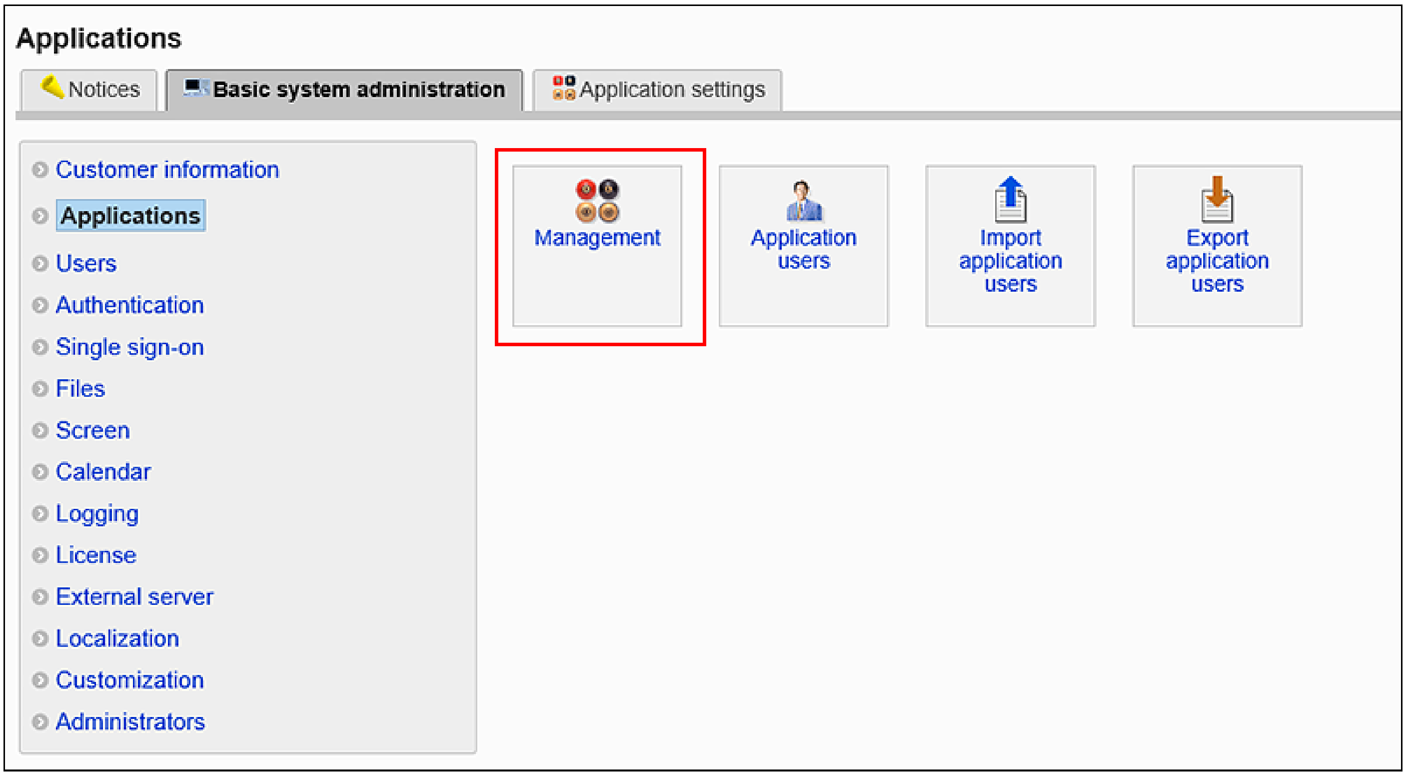
Only the system administrators can change the label of the Respond ("Like") Feature.

The change will be applied to the link of the respond feature on the user screen.



The label of "Like" can be changed from "Edit application name" screen. You can navigate to this screen by selecting "Like" in "Management" screen.

For details, refer to the "Editing Application Names(208Page)" section.



2.20.1. General Settings for Responses

On "General settings" screen of the responses, you can set whether to allow users to use the Respond feature.

Applications for which users can set to use Respond feature are as follows:

- Scheduler:
  Available in Garoon version 5.9.0 or later.
- Messages
- Bulletin Board

Note

- You cannot set whether to allow use of the Respond feature on Space. On Space, the Respond feature is always available if the feature is active.

Steps:

1. **Check that the Respond feature is active.**

   For details, refer to the "Using Applications(206Page)" section.

2. **Click the administration menu icon (gear icon) in the header.**

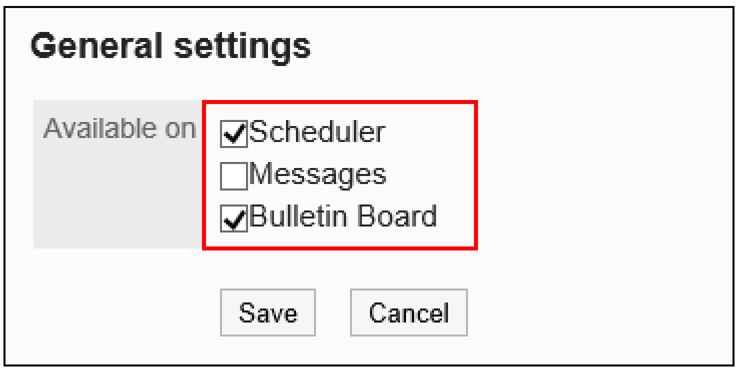
3. **Click "System settings".**

4. **Select "Application settings" tab.**

5. **Click "Respond".**

6. **Click "General Settings".**

7. **On "General settings" screen, select the check boxes of the applications to allow users to use the Respond feature.**



8. Confirm your settings and click "Save".

2.21. Cybozu Office / Dezie Connector

This section describes Garoon integration with Cybozu Office and Dezie Connector.

2.21.1. Configuring Integration with Cybozu Office

You can integrate Garoon with Cybozu Office (custom app).
For details on custom apps, see Custom app feature on the product site.

Cybozu Office is available only in Japanese.
For this reason, custom app screens are displayed in Japanese regardless of the user's display language settings.
The time zone settings in Garoon do not apply to custom apps.
For details on setting up Garoon integration with custom apps, see Custom App Integration Guide.

Caution

- The Linux version of Cybozu Office does not support custom app connections.

2.21.2. Configuring Dezie Connector

Garoon can work with Dezie.
For details on Dezie, see Cybozu Dezie 8 on the product site.

Dezie is available only in Japanese.

If you want Garoon to work with Dezie, contact your vendor or our official partners.

For settings to connect Garoon with Dezie, see the Dezie Connector guide.

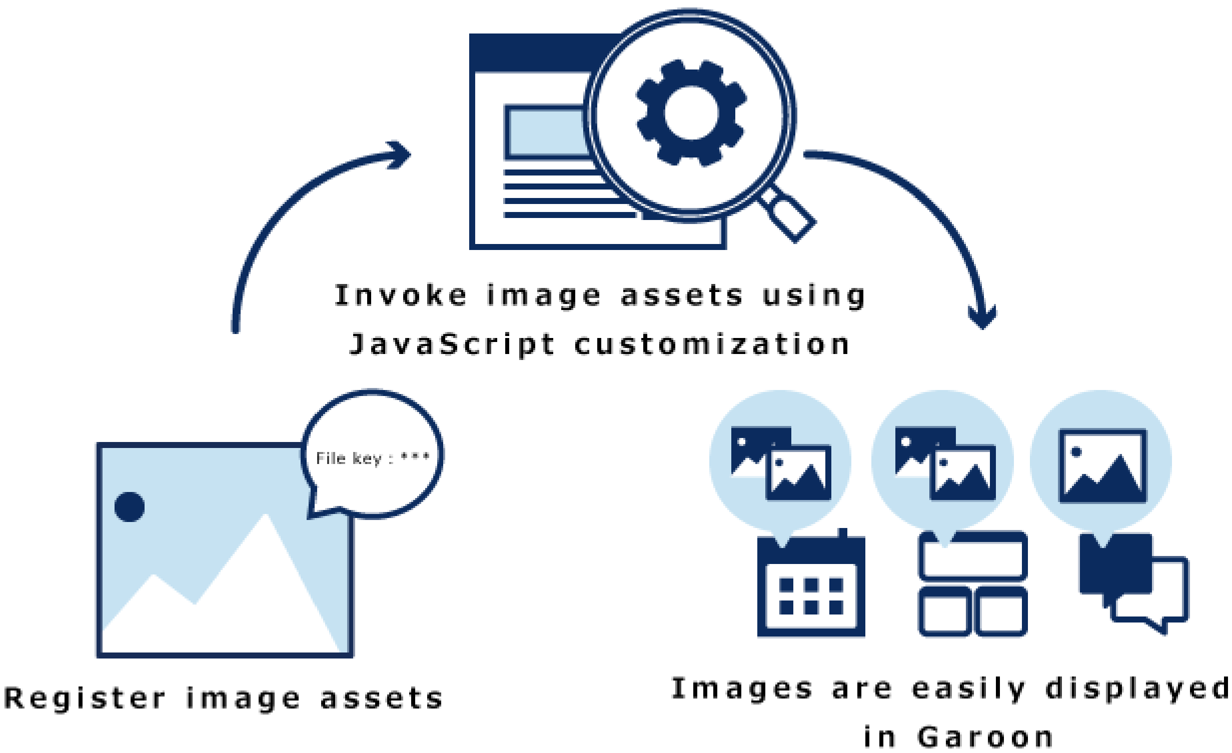
Caution

- You cannot use Dezie Connector feature in environments where Integrated Windows Authentication is used. When you are using Integrated Windows Authentication, the information required for authentication cannot be sent in a request when you use to set Dezie Connector.

2.22. Image Assets

"Image assets" is a feature to save image files as shared resources in Garoon.

Once image assets are configured, you can easily invoke images that you want to display using JavaScript customization. As a result, you can customize the Garoon more flexibly.



This page explains how to configure image assets in Garoon.

Please refer to the cybozu developer network for instructions on how to display images registered in image assets.

Caution

- Displaying many images in one screen may cause a heavy load on Garoon. Please refrain from using the feature which could have an adverse effect on the performance.

References

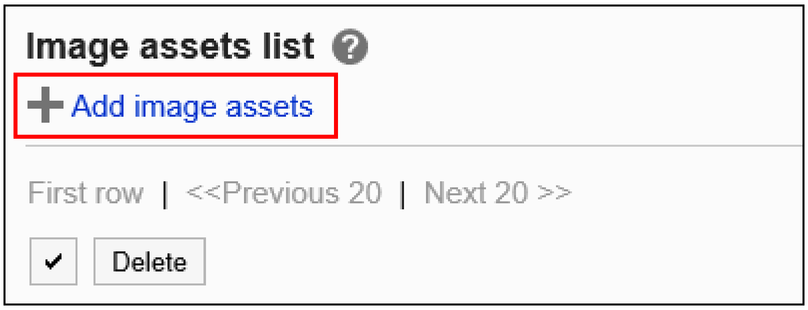
- Add image assets(1652Page)
- Deleting Image Assets(1655Page)
- cybozu developer network

2.22.1. Adding Image Assets

You can add image assets.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Image Assets".**
5. **5. Click "Image assets list".**
6. **Click "Add image assets" in "Image assets list" screen.**



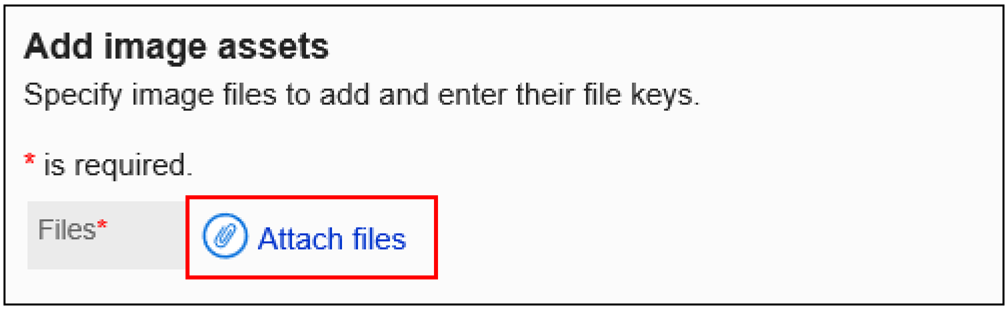
7. **Click "Attach files" in "Add image assets" screen, and select file(s).**

You can add up to 30 files to the image assets at a time.

The maximum size of an image file which can be uploaded is 5 MB per file.

You can select multiple files at a time.

You can also select multiple files by drag and drop. For details, refer to Using Drag and drop feature.



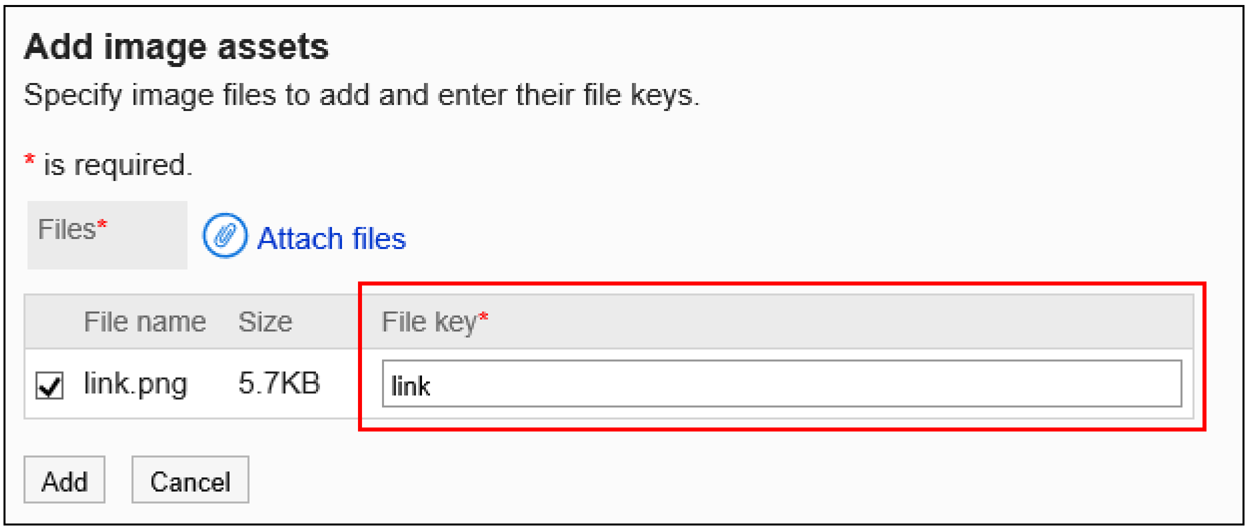
8. **Enter the file key.**

File key is mandatory.

File key is a unique code to distinguish each file. You must specify the file key which does not overlap with other file keys.

The maximum length of file key is 128 characters.

File key can contain only single-byte alphanumeric characters, hyphens (-), underscores (_), periods (.), and tildes (~).



9. **Confirm your settings and click "Add".**

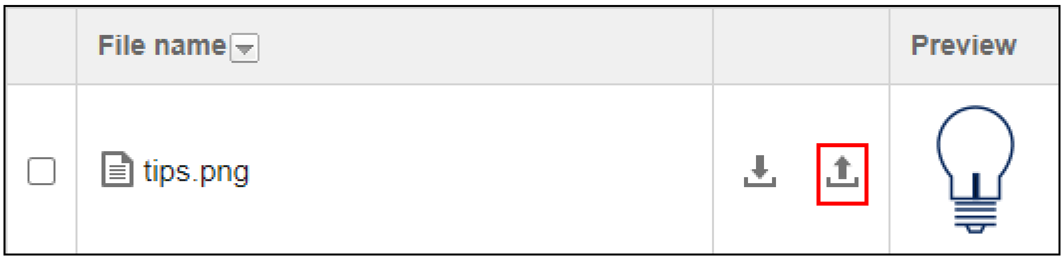
2.22.2. Updating Image Assets

You can update the image assets already registered.

You can update the image assets only on Garoon version 5.9.0 or later.

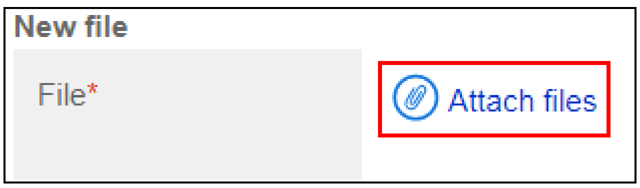
Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Image Assets".**
5. **5. Click "Image assets list".**
6. **On the "Image assets list" screen, click the update icon for the image you want to update.**



7. **On the "Update Files" screen, click "Attach Files" and select a file.**

The maximum size of image file which can be uploaded is 5 MB. You can also select multiple files by drag and drop. For details, refer to Using Drag and drop feature.



8. **Confirm your settings and click Update.**

2.22.3. Deleting Image Assets

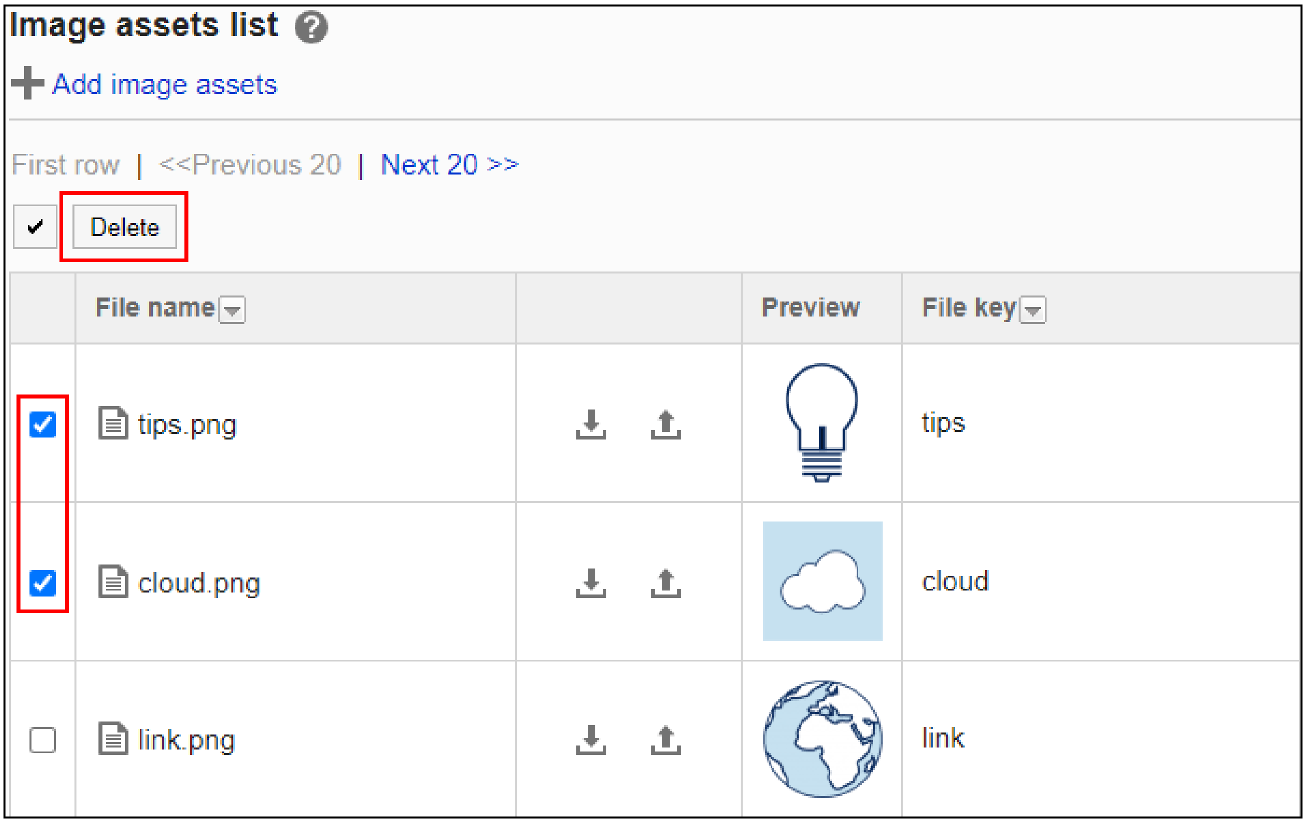
You can select and delete image assets.

Caution

- Deleted image assets cannot be restored.

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Image Assets".**
5. **5. Click "Image assets list".**
6. **On the "Image assets list" screen, select the check box next to the image asset you want to delete and then click [Delete].**



7. **Click "Yes" on the "Delete image assets" screen.**

3 chapter Maintenance

This section describes how to maintain Garoon, such as backing up data and migrating the server.

3.1. Scheduling Service

The scheduling service is a feature that automatically processes Garoon tasks.
The scheduling service executes tasks by running script files.

If you install Garoon in the default directory, the script file is saved in the following directory:

- On Windows:
  C:\inetpub\scripts\cbgrn\code\sched\dynamic
- On Linux:
  /var/www/cgi-bin/cbgrn/code/sched/dynamic

The script files and the main tasks that the scheduling service performs are as follows:

Script File Name	Main Tasks
apply_sandbox.csp	Apply a tentative reorganization to an operational environment
archive_log.csp	Archive Logs
background_job_daemon.csp	Start background_job
cleanup.csp	Delete temporary files and files that are not used
create_sandbox.csp	Create a tentative structure
delete_old_notification.csp	Delete notification data older than 30 days
delete_sandbox.csp	Delete tentative structures
get_six_kinds_of_day_data.csp	Receive Rokuyo data
get_weather_data.csp	Receive weather forecasts

Script File Name	Main Tasks
grn_bulletin_send_notification.csp	Send notification of topics waiting to be published
grn_delete_user_data.csp	Delete actual data for users who have deleted in Garoon
grn_dezielink_sync_user.csp	Synchronize user profiles for Garoon and Dezie
grn_mail_auto_receive.csp	Receive e-mails automatically
grn_workflow_cutover.csp	Switch annual year used in request number of workflows
preset_sandbox.csp	Apply tentative reorganization at specified date and time
table_convert.csp	Delete and update unnecessary data in Garoon

3.1.1. Tasks Performed

This section describes the script files and functions that the scheduling service performs.

apply_sandbox.csp

Apply the tentative structure to the current environment.
After the process is performed, the tasks are deleted.

Execution time

The time when the tasks will be performed differs according to the the settings specified by the administrators.

- Applying the Tentative Structure to the Current Environment Immediately:
  On the tentative reorganization screen, if your system administrator clicks "Apply Now", a task is added to the scheduling service. The task will be performed within one minute after the task is added to the scheduling service.
- Applying the Tentative Structure to the Current Environment at the Specified date and time:
  The task will be performed at the specified date and time

Impacts in case if the task is not performed

The tentative structure is not applied to the current environment.

archive_log.csp

Archive logs.
After you have created the archive, you can delete the log data from the database. If the server has an archive that has passed the retention period, delete the archive as well.

Execution time

The time set in "Archive schedule" in the "Archive settings" of "Logging" in "System Administration (Basic System)"
Default value:
JTS: Every Sunday 1:00 PM
UTC: Every Saturday 3:00 PM

Impacts in case if the task is not performed

Logs are not archived. Logs that have not been archived are archived the next time the task is executed. Logs are archived for up to three weeks.

background_job_daemon.csp

Start background_job.
Tasks for notifications and transfer of e-mails are performed.

Execution time

Every minutes

Impacts in case if the task is not performed

Background_job won't start. Notifications and e-mail forwarding are not performed until the next execution time.

cleanup.csp

Purges the following data:

- (CGI directory)/(installation identifier)/upload_tmp
- (CGI directory)/(installation identifier)/tmp
- Temporary files older than 24 hours after having been saved in the Attachment storage area (the directory specified in the "Files" section of the common.ini file)
- Files associated with users who do not exist in Garoon[1]

  - E-mail sources[2]
  - Attachments of e-mails[2]
  - Temporary files created for indexing incoming e-mail attachments
  - Attachments in memo
  - Attachments in the Personal Address Book
  - "File" field in custom items in Personal Address Book
  - "File" field in custom items in Shared Address Book
  - Attachments in draft topics
  - Draft messages
  - Attachments in draft messages
  - Draft requests
  - Attachments in draft requests
  - Messages that the sender and all the recipients have been deleted[3] and attachments of the message
  - Cache data for portlets that are not used in Dezie Connector
  - Draft reports of the deleted user and their attachments
- Files that have been stored in Trash in Cabinet exceeding the retention period specified in "File & folder retention period"[4]
- Notifications of "Respond" for each user which fit into one of the following conditions:
  - Are 30 or more days old
  - Are older than the most recent 20 notifications

[1]: This is same as the cleanup_application.csp, which was running daily on Garoon version 3.1.x or earlier.

[2]: For incoming e-mails, outgoing e-mails, and draft e-mails.

[3]: It is not applied to snapshots.

[4]: This is same as the grn_cabinet_cleanup.csp, which was running daily on version 3.1.x or earlier Garoon.

Execution time

JST: Every 3:00 AM, 9:00 AM, 3:00 PM, and 9:00 PM

UTC: Every 0:00 AM, 6:00 AM, 0:00 PM, and 6:00 PM

Impacts in case if the task is not performed

- Temporary files are not deleted from the corresponding directories.
- Files associated with users who do not exist in Garoon are not deleted.
- Data moved to "Trash" is not deleted.

Files and data that have not been deleted will be deleted the next time the task is executed.

create_sandbox.csp

Create a tentative structure.

Execution time

A task is added to the Cybozu scheduling service by clicking Create on the Tentative reorganization screen.

The task will be performed within one minute after the task is added to the scheduling service.

Impacts in case if the task is not performed

The tentative structure is not created.

delete_old_notification.csp

Deletes notification data older than 30 days.

Execution time

The time set to the start time of deletion process in the automatic deletion settings of "Notifications" in "System Administration" (Application)

Default value:

JST: Every 11:00 PM

UTC: Every 2:00 PM

Impacts in case if the task is not performed

The notification data is not deleted. The notification data that have not been deleted will be deleted the next time the task is executed.

delete_sandbox.csp

Delete a tentative structure.

Execution time

A task is added to the cybozu scheduling service by clicking Delete on the Tentative reorganization screen.

The task will be performed within one minute after the task is added to the scheduling service.

Impacts in case if the task is not performed

The tentative structure is not deleted.

get_six_kinds_of_day_data.csp

Receives Rokuyo data.

Execution time

JST: December 1st, 4:00 PM.

JST: December 1st, 7:00 AM.

Impacts in case if the task is not performed

The Rokuyo data will not be received.
If the scheduling service stops at the execution time, you should follow the steps below to receive Rokuyo data:

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cybozu Online Service".**
5. **Click "Receive event data".**
6. **On the "Receive event data" screen, select the "Rokuyo" check box.**
7. **Confirm your settings and click "Receive".**

get_weather_data.csp

Receives weather forecasts.

Execution time

JST: Every 3:00 AM, 9:00 AM, 3:00 PM, and 9:00 PM

JST: Every 0:00 AM, 6:00 AM, 0:00 PM, and 6:00 PM

Impacts in case if the task is not performed

You cannot receive the weather forecast.
If the scheduling service stops at the execution time, wait for the next execution or you should follow the steps below to receive weather forecast:

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**

2. **Click "System settings".**

3. **Select "Application settings" tab.**

4. **Click "Cybozu Online Service".**

5. **Click "Receive event data".**

6. **On the "Receive event data" screen, select the "Weather forecast" check box.**

7. **Confirm your settings and click "Receive".**

grn_bulletin_send_notification.csp

Perform the process of sending notifications of topics that are waiting to be published.
At the specified start date/time of the posting period, notifications are created to users who are configured to receive them.
A task is registered for each topic that is waiting to be published. Completed tasks are deleted.

Execution time

When the topic is created and the start date/time of public period is specified, corresponding task is registered in the scheduling service.
The task will be executed at the specified start date/time of public period.

Impacts in case if the task is not performed

Even at the start date/time of public period, notifications of topics are not created.

grn_delete_user_data.csp

Deletes actual data for users who have deleted in Garoon.

Execution time

The time set in "User data deletion time" on the "Deletion time settings" screen under "User".
Default value:

- JST: from 11:00 PM to 3:00 AM
- UTC: from 2:00 PM to 6:00 PM

Impacts in case if the task is not performed

- Users are not deleted from Garoon.

- Users with the same login name as the deleted user cannot be added to Garoon until the next time the task is executed.

grn_dezielink_sync_user.csp

Synchronizes user profiles for Garoon and Dezie.

Execution time

The time set in "User information auto sync" on the "Dezie Connector settings" screen of Dezie Connector.

Impacts in case if the task is not performed

Automatic synchronization of user profiles is not performed.
User profiles must be synchronized by following the steps below:

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Cybozu Office / Dezie Connector".**
5. **Click "Dezie Connector settings".**
6. **On the "Dezie Connector settings" screen, click the item to synchronize manually in "User information auto sync".**
7. **Click "Yes" on the synchronize user profile screen.**

grn_mail_auto_receive.csp

Receives e-mails automatically.

Execution time

The time set in "Receive e-mail at specific time" on the "General settings" screen for E-mail.

Impacts in case if the task is not performed

E-mails are not received automatically. The next time the task is executed, the e-mails will be automatically received.

Users can receive e-mails that have not been automatically received by the following actions:

- On the "E-mail" screen, click "Receive" or "Receive for all accounts".
- Click the "You have n new e-mails" message displayed on "New E-mail" portlet.
- Update notifications by Cybozu Desktop 2.
- Sync data by KUNAI.

grn_workflow_cutover.csp

Switches annual period used in request number of workflows or approval numbers.

Execution time

The date and time set in the "Request & approval number annual changeover" field on the "General settings" screen of workflows.

Impacts in case if the task is not performed

The annual period used in request number of workflows or approval numbers doesn't switch.
You must change the date and time of the annual changeover to ensure that the changeover occurs at the next time the task is executed.
Change the date and time in "Request & approval number annual changeover" following to the steps below:

Steps:

1. **Click the Administration menu icon (gear icon) in the header.**
2. **Click "System settings".**
3. **Select "Application settings" tab.**
4. **Click "Workflow".**
5. **Click "General Settings".**
6. **On the "General Settings" screen, select the date and time to change the annual period in "Request & approval number annual changeover".**
   The date and time of the annual changeover must be the time after the current time.
   You must set a date and time out of Garoon outage such as during backup.
7. **Confirm your settings and click "Apply".**

preset_sandbox.csp

When the system administrator sets the date and time to apply the tentative reorganization to the current environment, preset_sandbox.csp adds a task to perform apply_sandbox.csp to the scheduling service.
After apply_sandbox.csp is performed at the specified date and time, the task of preset_sandbox.csp is deleted.

Execution time

The task will be performed at the specified date and time

Impacts in case if the task is not performed

The tentative structure is not applied at the specified date and time.

table_convert.csp

If there are any unnecessary data found in Garoon, they are deleted or updated.

Execution time

Every minutes

Impacts in case if the task is not performed

No unnecessary data is deleted or updated. It is performed at the next occurrence.

3.2. Backup and Restore

This section describes backup and restore, when Garoon is installed in the following environment.

- On Windows:
  - Installation identifier: cbgrn
  - CGI directory: C:\inetpub\scripts
  - MySQL installed directory: C:\Program Files\Cybozu
- On Linux:
  - Installation identifier: cbgrn
  - CGI Directory: /var/www/cgi-bin

  - MySQL installation directory: /usr/local/cybozu

Disclaimer

Before you can perform back up or restore, you must confirm the followings.

- Backup or restore operations should be performed by the following users.
  - On Windows:
    Users who have local Administrator rights on the server machine
  - On Linux:
    Users with root privilege
- Garoon cannot be used during data backup.
- Backups may take a long time, depending on the size of the data.
- Garoon version must be identical in backup source and in restore target.
- Do not store backup data in the following directory. Otherwise, you may lose data if upgrades or service packs are applied.
  - On Windows:
    - C:\Program Files\Cybozu and subdirectories
    - C:\inetpub\scripts\cbgrn and subdirectories
  - On Linux:
    - /usr/local/cyboze and subdirectories
    - /var/www/cgi-bin/cbgrn and subdirectories
- If the monitoring tool monitors the operation of each service or daemon, it is recommended to exclude Garoon from monitoring targets until the action is completed.
- If you are using a full text search server, you must change the value of "enable_fts" of the "common. ini" file (stored in the following directory) from "0" to "1" when restoring data.
  - On Windows:
    C:\inetpub\scripts\cbgrn\common.ini
  - On Linux:
    /var/www/cgi-bin/cbgrn/common.ini

Backup Target

Back up the "data" directory and the "files" directory used by the database (MySQL).
Data stored in each directory is as follows.

- "data" directory:
  Data required for MySQL to work is stored.
  This includes database user passwords and data from Garoon applications.

- "files" directory:
  Data contained in attachment files, such as messages and bulletin board posts, is stored.

MySQL data and attachment file data are connected.
Data retrieved from the "data" directory and the "files" directory at the same time are required for the restore.
When backing up data, carefully plan backup to avoid data inconsistency.

MySQL used in Garoon can be selected during installation of Garoon.
Depending on the MySQL you are using, MySQL service name and the directory path that is being backed up are different.

For Windows

If you are using MySQL bundled in the installer:

- MySQL Service Name:
  Cybozu_Database_Engine_5_0
- Directory path to be backed up:
  - C:\Program Files\Cybozu\mysql-5.0\data
  - C:\Program Files\Cybozu\mysql-5.0\files

If you are using MySQL that has been installed:

- MySQL Service Name:
  MySQL (version number)
- Directory to be backed up:
  - C:\ProgramData\MySQL\MySQLServer(version number)\data
  - C:\Program Files\Cybozu\mysql-5.0\files

For Linux

If you are using MySQL bundled in the installer:

- MySQL Service Name:
  cyde_5_0
- Directory to be backed up:
  - /usr/local/cybozu/mysql-5.0/data
  - /usr/local/cybozu/mysql-5.0/files

If you are using MySQL that has been installed:

- MySQL Service Name:
  mysqld
- Directory to be backed up:
  - /var/lib/mysql
  - /usr/local/cybozu/mysql-5.0/files

3.2.1. How to Back Up

In Garoon, there are two ways for back up.

- Backing up Garoon Using OS Commands
- Backing up Garoon Using mysqldump

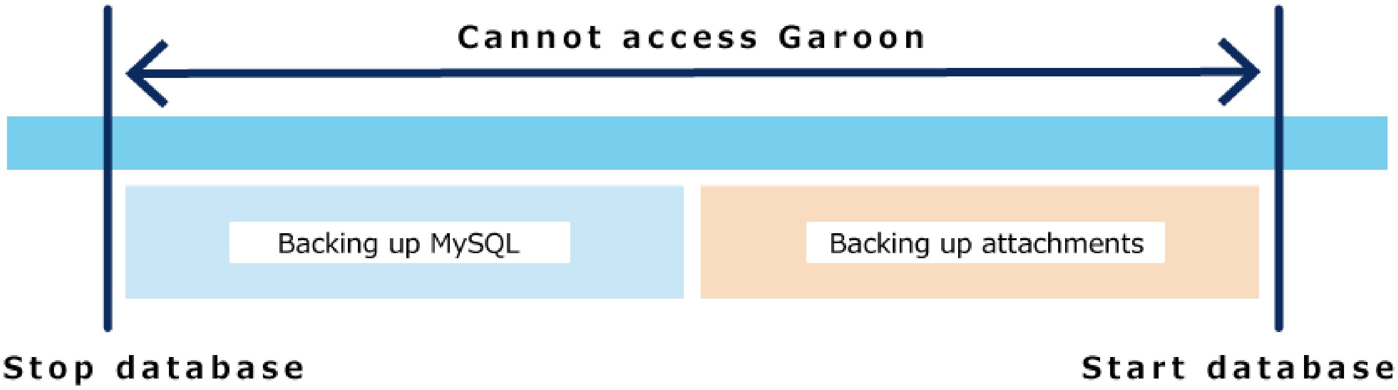
Confirm the differences and select a backup method.

Note

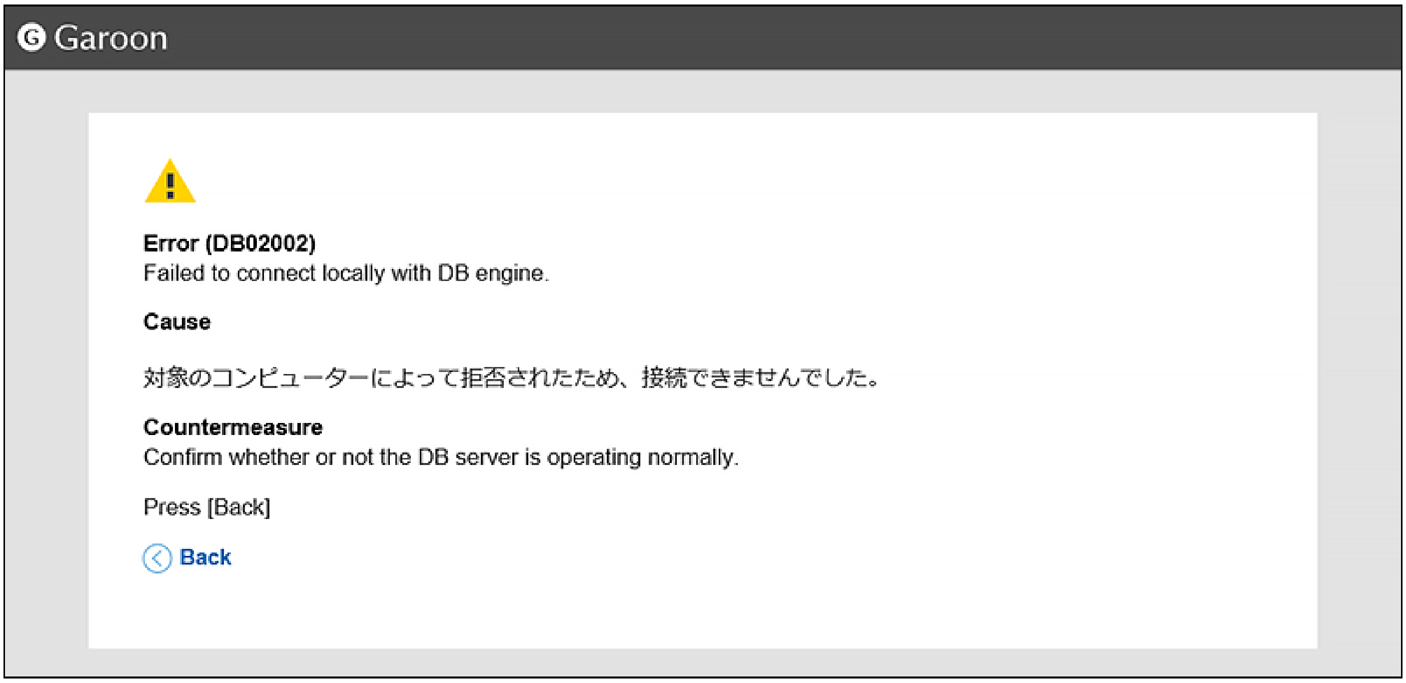
- Mysqldump is installed concurrently with MySQL.
- Garoon uses InnoDB for the MySQL table. No InnoDB-compliant backup tool (mysqlhotcopy command) is available.

Backing up Using OS Commands

This is the way to perform back up with the database disabled.
Back up the "data" directory and the "files" directory using the OS commands (cp, copy).
During backup, users cannot access Garoon.



If users access Garoon during backup, the following screen is displayed.



For details on how to do this, see the "Backing up Garoon Using OS Commands(1671Page)" section.

Backing up Using mysqldump

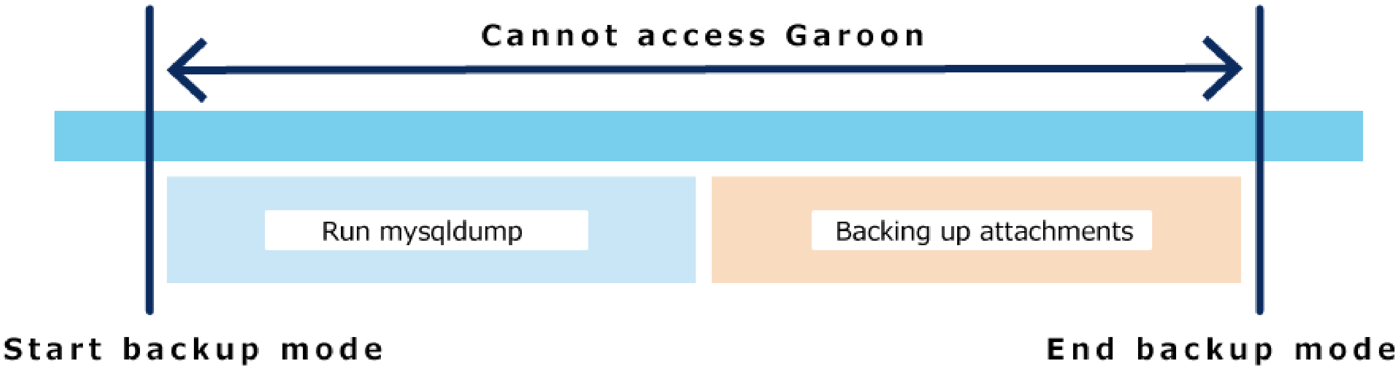
This is the way to perform back up with the database enabled.

Back up the "data" directory using mysqldump.

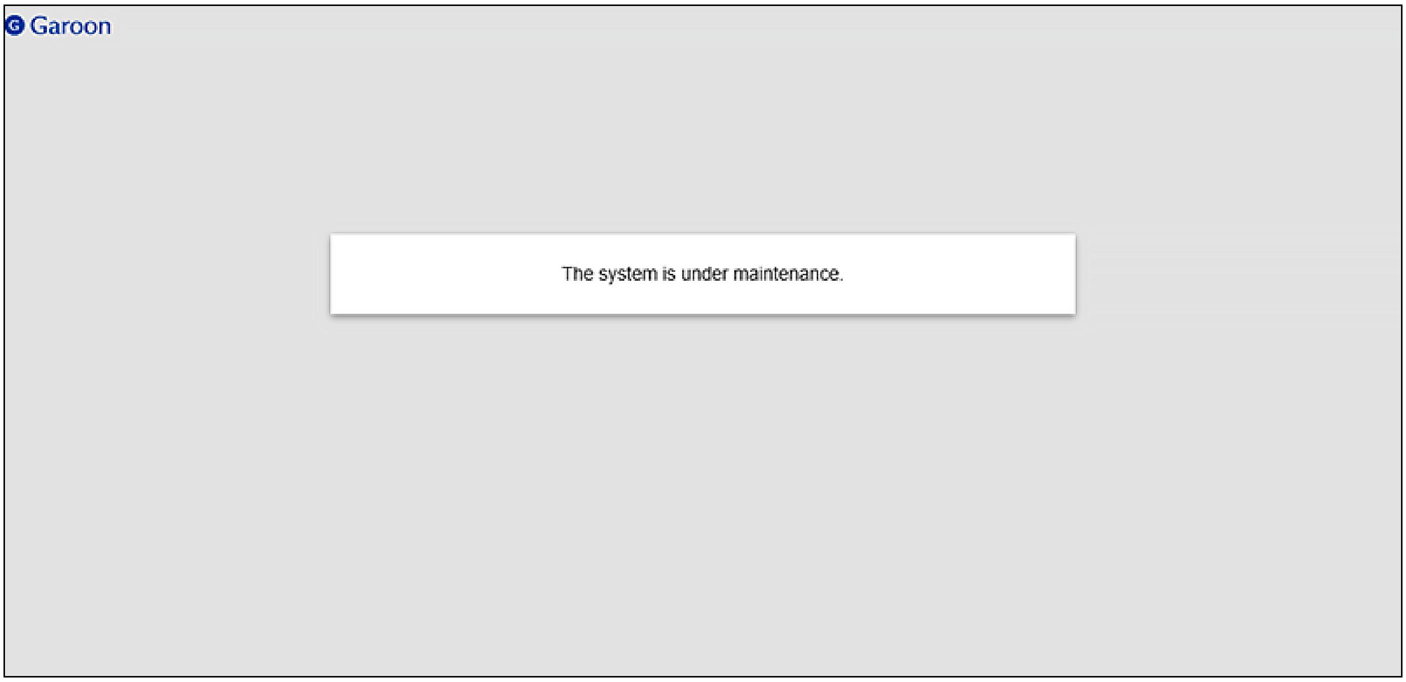
The "files" directory must be backed up separately using the OS commands. To ensure data integrity, you must prevent the database from being updated during the backup process.

In Garoon, you can use "Backup mode", which allows you to prevent database updates when performing back up using mysqldump.

Use the backup mode to prevent users from accessing Garoon during backup.



If users access Garoon during backup, the following screen is displayed.



For details on how to do this, see the "Backing up Garoon using mysqldump(1679Page)" section.

3.2.2. Backing up Using OS Commands

This section describes how to use OS commands to back up data.

During backup, users cannot access Garoon. You have to back up data when users do not have access to Garoon.

For Windows

On Windows, use OS commands to back up data.

This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- Directory to be backed up:
  - C:\Program Files\Cybozu\mysql-5.0\data
  - C:\Program Files\Cybozu\mysql-5.0\files
- Backup destination: C:\backup\YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Stop the Web server service.**

2. **Stop the scheduling service first, and then the MySQL service.**

   From the Windows Start menu, select "Administrative Tools" > "Services" to stop the following services:
   - Cybozu_Scheduling_Service_cbgrn
   - Cybozu_Database_Engine_5_0

3. **Confirm that the Garoon service is stopped.**

   1. Start Task Manager.

   2. On Windows Task Manager, click the "Processes" tab.

   3. Check that "sched.exe" and "mysqld.exe" are not displayed.

4. **Start the command prompt.**

5. **Create a destination directory under the current directory.**

   ```
   mkdir C:\backup\YYYYMMDD
   ```

6. **Copy the "data" directory and the "files" directory to the destination directory that you created in step 5.**

```
xcopy "C:\Program Files\Cybozu\mysql-5.0\data"
C:\backup\YYYYMMDD\data /e /i
xcopy "C:\Program Files\Cybozu\mysql-5.0\files"
C:\backup\YYYYMMDD\files /e /i
```

If you have copied the data to an existing directory, a message appears asking if you want to overwrite it.
Type "Yes" or "All" to overwrite. Type "No" to cancel.

7. **Start the MySQL service first, and then the scheduling service.**

   From the Windows Start menu, select Administrative Tools > service, and start the following services.
   - Cybozu_Database_Engine_5_0
   - Cybozu_Scheduling_Service_cbgrn

8. **Start the Web server service.**

9. **Ensure that Garoon can be accessed correctly.**

For Linux

On Linux, use OS commands to back up data.
This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- Directory to be backed up:
  - /usr/local/cybozu/mysql-5.0/data
  - /usr/local/cybozu/mysql-5.0/files
- Backup destination: /backup/YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Stop the Web server service.**

- **For Red Hat Enterprise Linux 6 or earlier:**

```
/etc/init.d/httpd stop
```

- **For Red Hat Enterprise Linux 7 or later:**

```
systemctl stop httpd.service
```

2. Stop the scheduling service first, and then the MySQL service.

```
/etc/init.d/cyss_cbgrn stop
/etc/init.d/cyde_5_0 stop
```

3. Confirm that the Garoon service is stopped.

Run the following command to confirm that the scheduling service and the MySQL service are not displayed.

```
ps -aux | grep cyss
ps -aux | grep mysqld
```

4. Create a destination directory.

```
mkdir -p /backup/YYYYMMDD
```

5. Copy the "data" directory and the "files" directory to the destination directory you created in step 4.

```
cp -rp /usr/local/cybozu/mysql-5.0/data /backup/YYYYMMDD/
cp -rp /usr/local/cybozu/mysql-5.0/files /backup/YYYYMMDD/
```

6. Start the MySQL service first, and then the scheduling service.

```
/etc/init.d/cyde_5_0 start
/etc/init.d/cyss_cbgrn start
```

7. Start the Web server service.

- **For Red Hat Enterprise Linux 6 or earlier:**

```
/etc/init.d/httpd start
```

- **For Red Hat Enterprise Linux 7 or later:**

```
systemctl start httpd.service
```

8. Ensure that Garoon can be accessed correctly.

3.2.3. Restoring Using OS Commands

This section describes how to use OS commands to restore data.
During restore, users cannot access Garoon. You have to restore data when users do not have access to Garoon.

Note

- If you allow users to automatically forward e-mails, the backup data may contain unprocessed data that was forwarded automatically. Because unprocessed automatically forwarded data is processed during restore, e-mails may be duplicated.

For Windows

On Windows, use OS commands to restore data.
This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- MySQL installed directory: C:\Program Files\Cybozu
- Backup destination: C:\backup\YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. Stop the Web server service.

2. Stop the scheduling service first, and then the MySQL service.

From the Windows Start menu, select "Administrative Tools" > "Services" to stop the following services:

- Cybozu_Scheduling_Service_cbgrn
- Cybozu_Database_Engine_5_0

3. Confirm that the Garoon service is stopped.

1. Start Task Manager.
2. On Windows Task Manager, click the "Processes" tab.
3. Check that "sched.exe" and "mysqld.exe" are not displayed.

4. Start the command prompt.

5. Delete the existing database area and the attachment area.

```
rmdir /s /q "C:\Program Files\Cybozu\mysql-5.0\data"
rmdir /s /q "C:\Program Files\Cybozu\mysql-5.0\files"
```

6. Copy the backed up data to the source directory.

```
xcopy C:\backup\YYYYMMDD\data "C:\Program Files\Cybozu\mysql-5.0\data" /e /i
xcopy C:\backup\YYYYMMDD\files "C:\Program Files\Cybozu\mysql-5.0\files" /e /i
```

7. Ensure that the Full Control permission is granted to the Everyone group on the directory copied in step 6.

If not, grant the full control permission to the Everyone group.

8. Start the MySQL service first, and then the scheduling service.

From the Windows Start menu, select Administrative Tools > service, and start the following services.

- Cybozu_Database_Engine_5_0
- Cybozu_Scheduling_Service_cbgrn

9. **Start the Web server service.**

10. **Ensure that Garoon can be accessed correctly.**

Note

- If an error occurs when you try to attach a file in Garoon after restore, see the article in the support guide about the case you see an error (FW00039): Cannot continue processing .
- The privileges set for the database area and the attachment area vary depending on the server configuration and the OS version where Garoon is running.
  For details, please contact our official partners or your vendor.

For Linux

On Linux, use OS commands to restore data.
This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- MySQL installation directory: /usr/local/cybozu
- Backup destination: /backup/YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Stop the Web server service.**
   - **For Red Hat Enterprise Linux 6 or earlier:**

   ```
   /etc/init.d/httpd stop
   ```

   - **For Red Hat Enterprise Linux 7 or later:**

```
systemctl stop httpd.service
```

2. **Stop the scheduling service first, and then the MySQL service.**

```
/etc/init.d/cyss_cbgrn stop
/etc/init.d/cyde_5_0 stop
```

3. **Execute the following command to confirm that the Garoon service is stopped.**

```
ps -aux | grep cyss
ps -aux | grep mysqld
```

4. **Delete the existing database area and the attachment area.**

```
rm -rf /usr/local/cybozu/mysql-5.0/data
rm -rf /usr/local/cybozu/mysql-5.0/files
```

5. **Copy the backed up data to the source directory.**

```
cp -rp /backup/YYYYMMDD/data /usr/local/cybozu/mysql-5.0/
cp -rp /backup/YYYYMMDD/files /usr/local/cybozu/mysql-5.0/
```

6. **Confirm that the access permissions for the restored data are correctly set.**

The following settings are required to access Garoon.

- Data stored in /usr/local/cybozu/mysql-5.0/data.
  Owner: User to execute CGI (for example, apache)
  Access permissions for the directory and subdirectories: 755
  Access permissions for files in the directory: 755
- Data stored in /usr/local/cybozu/mysql-5.0/files
  Owner: User to execute CGI (for example, apache)
  Access permissions for the directory and subdirectories: 755
  Access permissions for files in the directory: 644

To change access permissions, execute the following commands:

```
chmod -R 755 /usr/local/cybozu/mysql-5.0/data
chown -R (user to execute CGI):root /usr/local/cybozu/mysql-5.0/data
find /usr/local/cybozu/mysql-5.0/files/ -type d | xargs chmod 755
```

```
find /usr/local/cybozu/mysql-5.0/files/ -type f | xargs chmod 644
find /usr/local/cybozu/mysql-5.0/files/ | xargs chown (user to execute CGI):root
```

7. Start the MySQL service first, and then the scheduling service.

```
/etc/init.d/cyde_5_0 start
/etc/init.d/cyss_cbgrn start
```

8. Start the Web server service.

- **For Red Hat Enterprise Linux 6 or earlier:**

```
/etc/init.d/httpd start
```

- **For Red Hat Enterprise Linux 7 or later:**

```
systemctl start httpd.service
```

9. Ensure that Garoon can be accessed correctly.

Note

- If an error occurs when you try to attach a file in Garoon after restore, see the article in the support guide about the case you see an error (FW00039): Cannot continue processing .

3.2.4. Backing up Using Mysqldump

This section describes how to use mysqldump to back up data.

During backup, users cannot access Garoon. You have to back up data when users do not have access to Garoon.

Points to Check before Backing Up

Before performing back up using mysqldump, check the followings.

Enabling Backup Mode

Start the database, and perform back up using mysqldump.
Note that the "files" directory must be backed up separately using OS commands. To ensure data integrity, you must prevent the database from being updated during the backup process.
Use the backup mode to prevent users from accessing Garoon during backup.

By default, the backup mode is disabled.
Before starting the back up, modify the configuration file (common.ini) to enable the backup mode.

Path to the "common.ini" file

(CGI directory)/(installation identifier)/common.ini
Example:

- On Windows:
  C:\inetpub\scripts\cbgrn\common.ini
- On Linux:
  /var/www/cgi-bin/cbgrn/common.ini

Contents to be modified in the "common.ini" file

Under "BackupMode", delete the "disable = "1"" row.
Before changing:

```
:
[BackupMode]
disable = "1"
driver = "xxxxx"
:
```

After changing:

```
:
[BackupMode]
driver = "xxxxx"
:
```

For Windows

On Windows, use mysqldump to back up data.

This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- CGI directory: C:\inetpub\scripts
- Directory to be backed up:
  - C:\Program Files\Cybozu\mysql-5.0\data
  - C:\Program Files\Cybozu\mysql-5.0\files
- Backup destination: C:\backup\YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Start the command prompt.**

2. **Create a destination directory.**

```
mkdir C:\backup\YYYYMMDD
```

3. **Stop the scheduling service.**

   From the Windows Start menu, select "Administrative Tools" > "Services" to stop the following services:
   - Cybozu_Scheduling_Service_cbgrn

4. **Confirm that the scheduling service is stopped.**

   1. Start Task Manager.
   2. On Windows Task Manager, click the "Processes" tab.
   3. Confirm that sched.exe is not displayed.

5. **Set Garoon to backup mode.**

```
cd C:\inetpub\scripts\cbgrn
.\grn.exe -C -q code\command\backupmode_start.csp
```

6. Using the database administrator account, execute mysqldump.

```
"C:\Program Files\Cybozu\mysql-5.0\bin\mysqldump" --defaults-file="C:\Program Files\Cybozu
\mysql-5.0\etc\my.ini" --all-databases --single-transaction -u cbroot -p >
C:\backup\YYYYMMDD\full.sql
```

7. Specify the database administrator password.

8. Use OS commands to back up attachments.

```
xcopy "C:\Program Files\Cybozu\mysql-5.0\files" C:\backup\YYYYMMDD\files /e /i
```

9. Cancel the backup mode.

```
cd C:\inetpub\scripts\cbgrn
.\grn.exe -C -q code\command\backupmode_end.csp
```

10. Start the scheduling service.

From the Windows Start menu, select Administrative Tools > service, and start the following services.

- Cybozu_Scheduling_Service_cbgrn

11. Ensure that Garoon can be accessed correctly.

Note

- To disable the backup mode, restore the contents of "common. ini".

For Linux

On Linux, you can use mysqldump to back up data.

This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- CGI Directory: /var/www/cgi-bin
- Directory to be backed up:
    - /usr/local/cybozu/mysql-5.0/data
    - /usr/local/cybozu/mysql-5.0/files
- Backup destination: /backup/YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Start the command prompt.**

2. **Create a destination directory.**

```
mkdir -p /backup/YYYYMMDD
```

3. **Stop the scheduling service.**

```
/etc/init.d/cyss_cbgrn stop
```

4. **Confirm that the scheduling service is stopped.**

   Run the following command to confirm that the scheduling service is not displayed.

```
ps -aux | grep cyss
```

5. **Set Garoon to backup mode.**

```
cd /var/www/cgi-bin/cbgrn
./grn.cgi -C -q code/command/backupmode_start.csp
```

6. **Using the database administrator account, execute mysqldump.**

```
/usr/local/cybozu/mysql-5.0/bin/mysqldump
--defaults-file=/usr/local/cybozu/mysql-5.0/etc/my.ini
--all-databases --single-transaction -u cbroot -p >
/backup/YYYYMMDD/full.sql
```

7. **Specify the database administrator password.**

8. **Use OS commands to back up attachments.**

```
cp -rp /usr/local/cybozu/mysql-5.0/files /backup/YYYYMMDD/
```

9. **Cancel the backup mode.**

```
cd /var/www/cgi-bin/cbgrn
./grn.cgi -C -q code/command/backupmode_end.csp
```

10. **Start the scheduling service.**

```
/etc/init.d/cyss_cbgrn start
```

11. **Ensure that Garoon can be accessed correctly.**

Note

- To disable the backup mode, restore the contents of "common. ini".

3.2.5. Restoring Using Mysqldump

This section describes how to use mysqldump to restore data.

During restore, users cannot access Garoon. You have to restore data when users do not have access to Garoon.

Note

- If you allow users to automatically forward e-mails, the backup data may contain unprocessed data that was forwarded automatically. Because unprocessed automatically forwarded data is processed during restore, e-mails may be duplicated.

Points to Check before Restore

Before performing restore using mysqldump, check the followings.

Enabling Backup Mode

Start the database, and perform restore using mysqldump.
Note that the "files" directory must be restored separately using OS commands. To ensure data integrity, you must prevent the database from being updated during the restore process.
Use the backup mode to prevent users from accessing Garoon during restore.

By default, the backup mode is disabled.
Before starting the restore, modify the configuration file (common.ini) to enable the backup mode.

Path to the "common.ini" file

(CGI directory)/(installation identifier)/common.ini
Example:

- On Windows:
  C:\inetpub\scripts\cbgrn\common.ini
- On Linux:
  /var/www/cgi-bin/cbgrn/common.ini

Contents to be modified in the "common.ini" file

Under "BackupMode", delete the "disable = "1"" row.
Before changing:

```
:
[BackupMode]
disable = "1"
driver = "xxxxx"
:
```

After changing:

```
:
[BackupMode]
driver = "xxxxx"
:
```

Mysqldump Speed

Mysqldump takes a long time to backup and restore, proportional to the amount of data.
Restores take longer time than backups.
Restore using mysqldump takes longer time than restore using OS commands.

Disk Usage after Restore

After the restore using mysqldump, the disk usage may be smaller than the disk usage before backup. This is because the data that you backed up does not contain unused space. No data is missing.

For Windows

On Windows, restore data using mysqldump.
This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- CGI directory: C:\inetpub\scripts
- MySQL installed directory: C:\Program Files\Cybozu
- Backup destination: C:\backup\YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Stop the Web server service.**

2. **Stop the scheduling service.**

   From the Windows Start menu, select "Administrative Tools" > "Services" to stop the following services:

   - Cybozu_Scheduling_Service_cbgrn

3. **Confirm that the scheduling service is stopped.**

   1. Start Task Manager.

   2. On Windows Task Manager, click the "Processes" tab.

   3. Confirm that sched.exe is not displayed.

4. **Start the command prompt.**

5. **Set Garoon to backup mode.**

```
cd C:\inetpub\scripts\cbgrn
.\grn.exe -C -q code\command\backupmode_start.csp
```

6. **Using the database administrator account, import the backed up data.**

```
"C:\Program Files\Cybozu\mysql-5.0\bin\mysql" --defaults-file="C:\Program Files\Cybozu\mysql-5.0\etc
\my.ini" -u cbroot -p < C:\backup\YYYYMMDD\full.sql
```

7. **Specify the database administrator password.**

8. **Delete the existing attachment area.**

```
rmdir /s /q "C:\Program Files\Cybozu\mysql-5.0\files"
```

9. **Use OS commands to restore attachments.**

```
xcopy C:\backup\YYYYMMDD\files "C:\Program Files\Cybozu\mysql-5.0\files" /e /i
```

10. **Ensure that the Full Control permission is granted to the Everyone group on the directory restored in step 6 and 9.**

If not, grant the full control permission to the Everyone group.

11. Restart the MySQL service.

From the Windows Start menu, select Administrative Tools > Service, and restart the following service:

- Cybozu_Database_Engine_5_0

12. Cancel the backup mode.

```
cd C:\inetpub\scripts\cbgrn
.\grn.exe -C -q code\command\backupmode_end.csp
```

13. Start the scheduling service.

From the Windows Start menu, select Administrative Tools > service, and start the following services.

- Cybozu_Scheduling_Service_cbgrn

14. Start the Web server service.

15. Ensure that Garoon can be accessed correctly.

Note

- To disable the backup mode, restore the contents of "common. ini".

For Linux

On Linux, restore data using mysqldump.

This example illustrates the use of MySQL bundled in the installer.

- Installation identifier: cbgrn
- CGI Directory: /var/www/cgi-bin
- MySQL installation directory: /usr/local/cybozu
- Backup destination: /backup/YYYYMMDD

Note

- Adjust the settings to match your environment.
  If you are using MySQL that has been installed, MySQL service name is different.
  For details, see the "Backup Target(1667Page)" section.

Steps:

1. **Stop the Web server service.**
   - **For Red Hat Enterprise Linux 6 or earlier:**

   ```
   /etc/init.d/httpd stop
   ```

   - **For Red Hat Enterprise Linux 7 or later:**

   ```
   systemctl stop httpd.service
   ```

2. **Stop the scheduling service.**

   ```
   /etc/init.d/cyss_cbgrn stop
   ```

3. **Confirm that the scheduling service is stopped.**
   Run the following command to confirm that the scheduling service is not displayed.

   ```
   ps -aux | grep cyss
   ```

4. **Set Garoon to backup mode.**

   ```
   cd /var/www/cgi-bin/cbgrn
   ./grn.cgi -C -q code/command/backupmode_start.csp
   ```

5. **Using the database administrator account, import the backed up data.**

   ```
   /usr/local/cybozu/mysql-5.0/bin/mysql --defaults-file=/usr/local/cybozu/mysql-5.0/etc/my.ini -u cbroot -p
   < /backup/YYYYMMDD/full.sql
   ```

6. **Specify the database administrator password.**

7. **Delete the existing attachment area.**

```
rm -rf /usr/local/cybozu/mysql-5.0/files
```

8. **Use OS commands to restore attachments.**

```
cp -rp /backup/YYYYMMDD/files /usr/local/cybozu/mysql-5.0/
```

9. **Confirm that the access permissions for the restored data are correctly set.**

The following settings are required to access Garoon.

- Data stored in /usr/local/cybozu/mysql-5.0/data.
  Owner: User to execute CGI (for example, apache)
  Access permissions for the directory and subdirectories: 755
  Access permissions for files in the directory: 755
- Data stored in /usr/local/cybozu/mysql-5.0/files
  Owner: User to execute CGI (for example, apache)
  Access permissions for the directory and subdirectories: 755
  Access permissions for files in the directory: 644

To change access permissions, execute the following commands:

```
chmod -R 755 /usr/local/cybozu/mysql-5.0/data
chown -R (user to execute CGI):root /usr/local/cybozu/mysql-5.0/data
find /usr/local/cybozu/mysql-5.0/files/ -type d | xargs chmod 755
find /usr/local/cybozu/mysql-5.0/files/ -type f | xargs chmod 644
find /usr/local/cybozu/mysql-5.0/files/ -type d | xargs chown (user to execute CGI):root
```

10. **Restart the MySQL service.**

```
/etc/init.d/cyde_5_0 restart
```

11. **Cancel the backup mode.**

```
cd /var/www/cgi-bin/cbgrn
./grn.cgi -C -q code/command/backupmode_end.csp
```

12. **Start the scheduling service.**

```
/etc/init.d/cyss_cbgrn start
```

13. Start the Web server service.

- **For Red Hat Enterprise Linux 6 or earlier:**

```
/etc/init.d/httpd start
```

- **For Red Hat Enterprise Linux 7 or later:**

```
systemctl start httpd.service
```

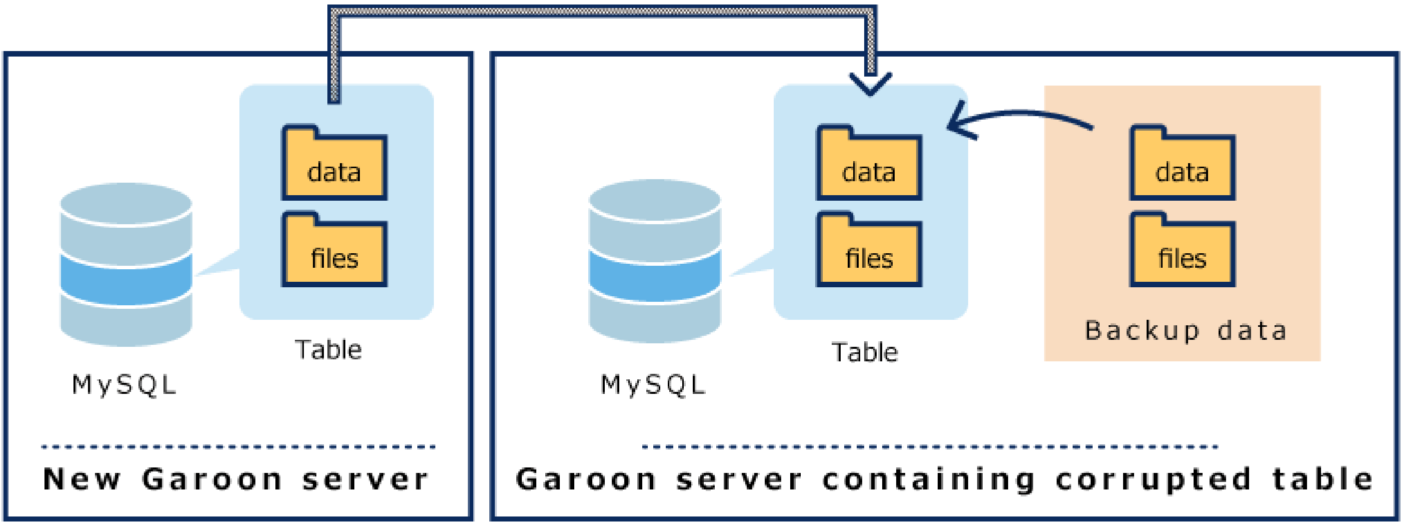
14. Ensure that Garoon can be accessed correctly.

Note

- To disable the backup mode, restore the contents of "common. ini".

3.2.6. What to Do If MySQL Tables Are Corrupted

MySQL tables (authorization database) may be lost, due to disk corruption, system failure, etc.
If you cannot import dumped data (data retrieved using mysqldump) due to corruption of a MySQL table, you can retrieve MySQL data from another system, and then restore the backed up data.



Steps:

1. Prepare a new server and install Garoon.

2. Back up the Garoon data that you installed in step 1 using the OS commands, and obtain a known-good MySQL table.

For details, see the "Backing up Garoon Using OS Commands(1671Page)" section.

3. Using the OS commands, restore the data from the normal MySQL table retrieved in step 2 to the Garoon server where the MySQL table is corrupted.

For details, see the "Restoring Garoon Using OS Commands(1675Page)" section.

4. On the Garoon server where the table is corrupted, restore the data that you have backed up using mysqldump.

For details, see the "Restoring Garoon Using mysqldump(1684Page)" section.

3.3. Server Migration

This section describes how to migrate Garoon to other servers.

References

- [Can I Change the Server Machine or Server OS Hosting Garoon]
- [Do I Need to Renew My License to Migrate My Garoon Server?]
- [Migrating Garoon from Windows Environment(1693Page)]
- [Migrating Garoon from Linux Environment(1697Page)]
- [Can I Change the Drive Where Garoon Is Installed?]

3.3.1. Migrating from Windows Environment

This section describes how to migrate Garoon from Windows environment to other servers.

Points to Check before Migration

- Server migrations should be performed by the following users.
  - On Windows:
    Users who have local Administrator rights on the server machine
  - On Linux:
    Users with root privilege
- The following must be identical on the source and destination servers to migrate:
  - Garoon versions:
    The revisions must be identical in revision level. You can check the version of your product in the footer on the screen.

    Example for Garoon version 5.0.1:
    5: Major Version
    0: Minor Version
    1: Revision
  - Installation identifier:
    You can check the installation identifier from the Garoon access URL.
    For the following URLs, the installation identifier is "cbgrn".
    http://192.0.2.0/scripts/cbgrn/grn.exe

  - database user password

- If the server OS type or host name are changed during server migration, the migrated Garoon access URL will be changed.
  For details, see the article in FAQ about activities that require changing IP addresses or host names of the Garoon server.
- When you use a full-text search server, the full-text search server and the Garoon server must be the same OS.
  If you continue to use the full-text search server after you have migrated Garoon to a different OS, the full-text search server must also be built in the same OS as the Garoon after the migration of Garoon.

For Migrations to Windows Environment

Migrate your Garoon on Windows to another Windows environment.

Steps:

1. **On the source server, back up the data in Garoon.**
   For details, see the following page:
   Backing up Garoon Using OS Commands(1671Page)
   Backing up Garoon Using mysqldump(1679Page)

2. **Installs and initializes Garoon on the destination server.**
   You must match the source and destination Garoon versions, installation identifiers, and database user passwords.
   The passwords for database administrative user and Administrator are optional. At the end of this procedure, the password will be the one you have set before the migration.

3. **Copy the backed up data in step 1 to the destination server environment and restore it.**
   For details, see the following page:
   Restoring Garoon Using OS Commands(1675Page)
   Restoring Garoon Using mysqldump(1684Page)

4. **Ensure that you can access Garoon in the destination environment.**

Caution

- When you migrate Garoon to another Windows environment, the following issues may occur due to IIS settings because its settings reverted to default:

- Files of size 30 MB or larger cannot be uploaded:
  For details, see the article in FAQ about in case you cannot upload files in 30MB or more .
- Files with attachments that have single-byte spaces in their names:
  For details, see the article in FAQ about in case you cannot download files with single-byte spaces or "+" in their names .

Note

- The language and time zone that you set at initialization will be the Garoon defaults.
- If an error occurs when you try to attach a file in Garoon after migration, see the article in the support guide about in case you see an error (FW00039): Cannot continue processing .

For Migrations to Linux Environment

The following example shows that migrating your Garoon on Windows to a Linux environment:

- On Windows:
  - Installation identifier: cbgrn
  - CGI directory: C:\inetpub\scripts
  - MySQL installed directory: C:\Program Files\Cybozu
- On Linux:
  - Installation identifier: cbgrn
  - CGI Directory: /var/www/cgi-bin
  - MySQL installation directory: /usr/local/cybozu

Steps:

1. **On Windows, disable notifications that the MySQL service sends to the full-text search server only if you are using full-text search.**
   If you are not using the full-text search server, proceed to step 2.
   1. Start Command Prompt and move to the following directory:
      ```
      cd C:\inetpub\scripts\cbgrn
      ```
   2. Execute the following command:
      Type the command in one line.

```
.\grn.exe -C -q code\command\fts\disable_udf_notifier.csp db_admin_password= (database administrator password)
```

Confirm that the message "UDF Notifier is out of service" appears.

If you receive an error message, see "Appendix B Error Messages" in the full-text search server guide.

2. Back up all the Garoon data on Windows.

For details, see the following page:

Backing up Garoon Using OS Commands(1671Page)

Backing up Garoon Using mysqldump(1679Page)

3. Installs and initializes Garoon on the Linux environment.

You must match the source and destination Garoon versions, installation identifiers, and database user passwords.

The passwords for database administrative user and Administrator are optional. At the end of this procedure, the password will be the one you have set before the migration.

4. Copy the backed up data in step 2 to the Linux environment and restore it.

For details, see the following page:

Restoring Garoon Using OS Commands(1675Page)

Restoring Garoon Using mysqldump(1684Page)

5. On Linux, install a full-text search server only if you are using full-text search.

If you are not using a full-text search server, proceed to step 6.

The full-text search server can be installed on the same server as Garoon, or on a different server. If you want to install the full-text search server on a server other than the server Garoon resides, the operating systems must be Linux.

For instructions on how to install the full-text search server, see "Installing" in the full-text search server guide.

6. Ensure that you can access Garoon in the Linux environment.

Note

- The language and time zone that you set at initialization will be the Garoon defaults.

- If an error occurs when you try to attach a file in Garoon after migration, see the article in the support guide about in case you see an error (FW00039): Cannot continue processing .

3.3.2. Migrating from Linux Environment

This section describes how to migrate Garoon from Linux environment to other servers.

Points to Check before Migration

- Server migrations should be performed by the following users.
  - On Windows:
    Users who have local Administrator rights on the server machine
  - On Linux:
    Users with root privilege
- The following must be identical on the source and destination servers to migrate:
  - Garoon versions:
    The revisions must be identical in revision level. You can check the version of your product in the footer on the screen.

    Cybozu Garoon Version 5.0.0

    Example for Garoon version 5.0.1:
    5: Major Version
    0: Minor Version
    1: Revision
  - Installation identifier:
    You can check the installation identifier from the Garoon access URL.
    For the following URLs, the installation identifier is "cbgrn".
    http://192.0.2.0/cgi-bin/cbgrn/grn.cgi
  - database user password
- If the server OS type or host name are changed during server migration, the migrated Garoon access URL will be changed.

For details, see the article in FAQ about activities that require changing IP addresses or host names of the Garoon server.

- When you use a full-text search server, the full-text search server and the Garoon server must be the same OS. If you continue to use the full-text search server after you have migrated Garoon to a different OS, the full-text search server must also be built in the same OS as the Garoon after the migration of Garoon.

For Migrations to Windows Environment

The following example shows that migrating your Garoon on Linux to a Windows environment:

- On Linux:
  - Installation identifier: cbgrn
  - CGI Directory: /var/www/cgi-bin
  - MySQL installation directory: /usr/local/cybozu
- On Windows:
  - Installation identifier: cbgrn
  - CGI directory: C:\inetpub\scripts
  - MySQL installed directory: C:\Program Files\Cybozu

Steps:

1. On Linux, disable notifications that the MySQL service sends to the full-text search server only when full-text search is used.

If you are not using the full-text search server, proceed to step 2.

1. Start the console and move to the following directory:

```
cd /var/www/cgi-bin/cbgrn
```

2. Execute the following command:

Type the command in one line.

```
./grn.cgi -C -q code/command/fts/disable_udf_notifier.csp db_admin_password= (database
administrator password)
```

Confirm that the message "UDF Notifier is out of service" appears.

If you receive an error message, see "Appendix B Error Messages" in the full-text search server guide.

2. Back up all the Garoon data on Linux.

For details, see the following page:

Backing up Garoon Using OS Commands(1671Page)
Backing up Garoon Using mysqldump(1679Page)

3. **Installs and initializes Garoon on the Windows environment.**

   You must match the source and destination Garoon versions, installation identifiers, and database user passwords.
   The passwords for database administrative user and Administrator are optional. At the end of this procedure, the password will be the one you have set before the migration.

4. **Copy the backed up data in step 2 to the Windows environment and restore it.**

   For details, see the following page:
   Restoring Garoon Using OS Commands(1675Page)
   Restoring Garoon Using mysqldump(1684Page)

5. **Install a full-text search server in the Windows environment only if you are using full-text search.**

   If you are not using a full-text search server, proceed to step 6.
   The full-text search server can be installed on the same server as Garoon, or on a different server. If you want to install the full-text search server on a server other than the server Garoon resides, the operating systems must be Windows.
   For instructions on how to install the full-text search server, see "Installing" in the full-text search server guide.

6. **Ensure that you can access Garoon in the Windows environment.**

Caution

- When you migrate Garoon to a Windows environment, the following issues may occur due to IIS settings:
  - Files of size 30 MB or larger cannot be uploaded:
    For details, see the article about in case you cannot upload files in 30MB or more in FAQ .
  - Files with attachments that have single-byte spaces in their names:
    For details, see the article about in case you cannot download files with single-byte spaces or "+" in their names in FAQ.

Note

- The language and time zone that you set at initialization will be the Garoon defaults.
- If an error occurs when you try to attach a file in Garoon after migration, see the article about in case you see an error (FW00039): Cannot continue processing in the support guide.

For Migrations to Linux Environment

Migrate your Garoon on Linux to another Linux environment.

Steps:

1. **On the source server, back up the data in Garoon.**

   For details, see the following page:
   Backing up Garoon Using OS Commands(1671Page)
   Backing up Garoon Using mysqldump(1679Page)

2. **Installs and initializes Garoon on the destination server.**

   You must match the source and destination Garoon versions, installation identifiers, and database user passwords.
   The passwords for database administrative user and Administrator are optional. At the end of this procedure, the password will be the one you have set before the migration.

3. **Copy the backed up data in step 1 to the destination server environment and restore it.**

   For details, see the following page:
   Restoring Garoon Using OS Commands(1675Page)
   Restoring Garoon Using mysqldump(1684Page)

4. **Ensure that you can access Garoon in the destination environment.**

Note

- The language and time zone that you set at initialization will be the Garoon defaults.

- If an error occurs when you try to attach a file in Garoon after migration, see the article in the support guide about in case you see an error (FW00039): Cannot continue processing .

3.3.3. Troubleshooting Full-Text Search Error (DB99999)

If you are using a full-text search server, and you want to migrate Garoon to a server with different OS on the source and destination, you must disable notifications sent from the MySQL service to the full-text search server before migration.
Otherwise, an error (DB99999) occurs and the full-text search server may not create indexes.

An Error Message Example

```
[Thu, 18 Feb 2016 12:02:13 +0900] 1 messages indexed.Error: DB99999
An error occurred in the database.
Database Error Number: 1305
Cause:
Response from Database: FUNCTION cb_cbgrn.notify does not exist
Counter Measure:
Please contact our official partners or your vendor.
```

If the above error occurs, change the MySQL notify library.

Changing the notify Library on Windows

This section describes a solution in case if an error (DB99999) occurs after migrating Garoon from a Linux environment to a Windows environment using a full-text search server with Garoon.
If the error above occurs, change the library used by MySQL from the one for Linux environment (notify.so) to the one for Windows environment (notify.dll).

Steps:

1. **Copy the notify library for Windows environment (notify.dll) to one for Linux environment (notify.so).**
   Execute the following command: Type the command in one line.

```
copy C:\Program Files\Cybozu\mysql-5.0\lib\plugin\notify.dll C:\Program Files\Cybozu\mysql-5.0\lib
\plugin\notify.so
```

2. Restart the MySQL service.

From the Windows Start menu, select Administrative Tools > Service, and restart the following service:

- Cybozu_Database_Engine_5_0

3. Execute the following command to move the directory:

```
cd C:\inetpub\scripts\cbgrn
```

4. Activate notifications that the MySQL service sends to the full-text search server.

Execute the following command: Type the command in one line.

```
.\grn.exe -C -q code\command\fts\enable_udf_notifier.csp db_admin_password=(database
administrator password)
```

Confirm that "UDF notifier is available" appears. If you receive an error message, see "Appendix B Error Messages" in the full-text search server guide.

5. Stop the MySQL service.

From the Windows Start menu, select "Administrative Tools" > "Services" to stop the following service:

- Cybozu_Database_Engine_5_0

6. Delete the notify library for Linux environment (notify.so) that you created in step 1.

Execute the following command: Type the command in one line.

```
del C:\Program Files\Cybozu\mysql-5.0\lib\plugin\notify.so
```

7. Start the MySQL service.

From the Windows Start menu, select Administrative Tools > service, and start the following services.

- Cybozu_Database_Engine_5_0

Note

- To use full-text search, after you have changed the Notify library, you must create indexes on the full-text search server. For steps on creating indexes, see "Creating Indexes" in the full-text search server guide.

Changing the notify Library on Linux

This section describes a solution in case if an error (DB99999) occurs after migrating Garoon from a Windows environment to a Linux environment using a full-text search server with Garoon.
If the error above occurs, change the library used by MySQL from the one for Windows environment (notify.dll) to the one for Linux environment (notify.so).

Steps:

1. **Copy the notify library for Linux environment (notify.so) to one for Windows environment (notify.dll).**
   Execute the following command: Type the command in one line.
   ```
   cp -p /usr/local/cybozu/mysql-5.0/lib/plugin/notify.so /usr/local/cybozu/mysql-5.0/lib/plugin/notify.dll
   ```

2. **Restart the MySQL service.**
   ```
   /etc/init.d/cyde_5_0 restart
   ```

3. **Execute the following command to move the directory:**
   ```
   cd /var/www/cgi-bin/cbgrn/
   ```

4. **Activate notifications that the MySQL service sends to the full-text search server.**
   Execute the following command: Type the command in one line.
   ```
   ./grn.cgi -C -q code/command/fts/enable_udf_notifier.csp db_admin_password= (database administrator password)
   ```
   Confirm that "UDF notifier is available" appears.
   If you receive an error message, see "Appendix B Error Messages" in the full-text search server guide.

5. Stop the MySQL service.

```
/etc/init.d/cyde_5_0 stop
```

6. Delete the notify library for Windows environment (notify.dll) that you created in step 1.

```
rm /usr/local/cybozu/mysql-5.0/lib/plugin/notify.dll
```

7. Start the MySQL service.

```
/etc/init.d/cyde_5_0 start
```

Note

- To use full-text search, after you have changed the Notify library, you must create indexes on the full-text search server. For steps on creating indexes, see "Creating Indexes" in the full-text search server guide.

3.4. Exclusion Settings for Anti-virus Software

If files used by Garoon in temporary file area are isolated as viruses by anti-virus software, Garoon may stop working or the performance may be degraded.

Directories to be excluded from virus scanning

In the anti-virus software installed on the same server where Garoon is installed, you must exclude the following directories from anti-virus scanning.

- (CGI directory)/(installation identifier)

  Example:
  - On Windows: C:\Inetpub\scripts\cbgrn
  - For Linux: /var/www/cgi-bin\cbgrn

- (document root directory)/(installation identifier)
  Example:
  - On Windows: C:\Inetpub\wwwroot\cbgrn
  - Linux: /var/www/html/cbgrn
- Directories other than "files" under (MySQL installation directory)/mysql-5.0
  Example:
  - On Windows: Directories other than "files" under C:\Program Files\Cybozu\mysql-5.0
  - Linux: Directories other than "files" under /usr/local/cybozu/mysql-5.0

Directories to be targeted for virus scanning

- (MySQL installation directory)/mysql-5.0/files
  Example:
  - On Windows: C:\Program Files\Cybozu\mysql-5.0/files
  - Linux: /usr/local/cybozu/mysql-5.0/files

If you are using "Full Text Search Server version 2.0"

On the server where the Full Text Search Server version 2 and Garoon are installed, exclude the following directories from the virus scanning.

- On the server where Full Text Search Server version 2 is installed
  (Full Text Search Server installation directory)/cbfts/
- On the server where Garoon is installed
  (MySQL installation directory)/mysql-5.0/files/(installation identifier)/mail/tmp_solr_index

Caution

- If you run anti-virus software on the server where Garoon is in operation, the performance of Garoon may be degraded.
- If you run the full-scan of anti-virus software, you must stop the service of Garoon.
  For details on how to stop Garoon services, see the article in FAQ about how to stop or start the services that are used in the Garoon .

3.5. Using the Command Line

This section describes commands you can perform on a server that has Garoon installed.
The command line allows system administrators to add users or delete appointments in bulk without accessing the System administration screen.
You can also programmatically automate operations such as adding users and deleting appointments.
The following operations can be performed using the command line:

- Managing Departments, Users, or Roles in a CSV File
- Deleting User Data for Deleted Users
- Deleting Appointments
- Deleting All Messages That Have Not Been Updated since the Specified Date
- Deleting Permissions to Change and Delete Messages in Bulk
- Deleting Expired Topics in Bulk
- Deleting All Topics That Have Not Been Updated since the Specified Date
- Deleting Incoming E-Mails in Bulk
- Initializing Garoon
- Initializing the Locale (For Windows Only)
- Deleting Logs in Bulk
- Exporting Log Data to CSV File
- Archiving Logs
- Exporting Command Execution Log
- Creating or Updating Indexes for Full-Text Search

3.5.1. Steps to Execute Commands

This section describes how to execute commands.

Caution

- We recommend that you delete application data using the command line during periods when users are not using Garoon. During the deletion process, the load on Garoon can be high, which may interfere with the business.

For Windows

Execute commands on Windows.
The command is executed by a user who has Administrator privileges.
This example assumes that Garoon is installed in the following environment:

- Installation identifier: cbgrn
- CGI directory: C:\inetpub\scripts

Steps:

1. **Stop the scheduling service only if you want to initialize Garoon.**
   From the Windows Start menu, select "Administrative Tools" > "Services" to stop the following services:
   - Cybozu_Scheduling_Service_cbgrn

2. **Start the command prompt.**

3. **Execute the following command to change the current directory:**
   ```
   cd C:\inetpub\scripts\cbgrn
   ```

4. **Execute the following command:**
   ```
   .\grn.exe -C -q code\command[command] [parameter]
   ```

5. **Start the scheduling service only if you initialize Garoon.**
   From the Windows Start menu, select Administrative Tools > service, and start the following services.
   - Cybozu_Scheduling_Service_cbgrn

For Linux

Execute commands on Linux.
Execute the command as a user who has root privileges.
When Garoon is in operation under the DB distributed configuration, commands must be executed on one of the application servers (the server where Web server is running).
This example assumes that Garoon is installed in the following environment:

- Installation identifier: cbgrn
- CGI Directory: /var/www/cgi-bin

Steps:

1. **Start the console.**
2. **Stop the scheduling service only if you want to initialize Garoon.**

   ```
   /etc/init.d/cyss_cbgrn stop
   ```

3. **Execute the following command to change the current directory:**

   ```
   cd /var/www/cgi-bin/cbgrn
   ```

4. **Execute the following command:**

   ```
   ./grn.cgi -C -q code/command/[command] [parameter]
   ```

5. **Start the scheduling service only if you initialize Garoon.**

   ```
   /etc/init.d/cyss_cbgrn start
   ```

3.5.2. Commands for User Administration

You can use the command line to perform the following actions on user administration:

- Managing Departments, Users, or Roles in a CSV File
- Deleting User Data for Deleted Users

Details of data that can be managed using a CSV file are as follows:

- Organization
  - Organization details
  - Organization member data

- Users
  - User profile
  - Membership information data
  - Role data by user
- Role
  - Role details
  - User data by role

Importing Departments, Users, and Roles from a CSV File

Use the command line to import departments, users, or roles from a CSV file.

Command

Organization	Command
Imports organization details	import_organization.csp
Imports organization members	import_organization_user.csp

Users	Command
Imports user profiles	import_user.csp
Imports membership information data	import_user_organization.csp
Imports role data by user	import_user_role.csp

Role	Command
Imports role details	import_role.csp
Imports user data by role	import_role_user.csp

Parameters

Parameters	Required item	Description
localfile	✔	Specify a path to the CSV file to import. The CSV file must have permissions to allow the users running the Web server to view the file.
charset		Specify the character encoding of the CSV file to import. Youo can use the following character codes: • SJIS-win • UTF-8 • ASCII • ISO-8859-1 • GB2312 • TIS-620 If omitted, the value in "default_external_encoding" of the config file common.ini is used. The default value is SJIS-win.
skip		Specify one of the following values: • 1 Imports data by skipping the header row of a CSV file. • 0 Imports data including the header row from a CSV file. When omitted, imports the header row and data from a CSV file.
old		Only applicable for importing user profile CSV files. Specify one of the following values: • 1 Imports a CSV file generated in Garoon earlier than version 3.1.0 to Garoon 3.1.0 or later. • 0 Imports a CSV file in the format for Garoon version 3.1.0 or later. If omitted, import a CSV file in the format for Garoon 3.1.0 or later.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Data type: User profiles
- Character encoding: UTF-8

- Header row: Skip

On Windows:

```
.\grn.exe -C -q code\command\import_user.csp localfile=user.csv charset=UTF-8 skip=1
```

On Linux:

```
./grn.cgi -C -q code/command/import_user.csp localfile=user.csv charset=UTF-8 skip=1
```

Note

- When you export organizations, users, or roles from the command line, the following fields will be empty.
    - Created by
    - Updated by

Exporting Departments, Users, and Roles from a CSV File

Use the command line to export departments, users, or roles to a CSV file.

Command

Organization	Command
Exports organization details	export_organization.csp
Exports organization members	export_organization_user.csp

Users	Command
Exports user profiles	export_user.csp
Export organization members	export_user_organization.csp
Exports role data by user	export_user_role.csp

Role	Command
Exports role details	export_role.csp
Exports user data by role	export_role_user.csp

Parameters

Parameters	Required item	Description
charset		Specify the character encoding of the CSV file to export. Youo can use the following character codes: • SJIS-win • UTF-8 • ASCII • ISO-8859-1 • GB2312 • TIS-620 If omitted, the value in "default_external_encoding" of the config file common.ini is used. The default value is SJIS-win.
title		Specify one of the following values: • 1 The item name is exported to the first row of the CSV file. • 0 The item name is not exported to the CSV file. If omitted, the item name will not be exported to the CSV file.
old		Only applicable for importing user profile CSV files. Specify one of the following values: • 1 Exports user profiles to a CSV file in the format for Garoon earlier than version 3.1.0. • 0 Exports user profiles to a CSV file in the format for Garoon version 3.1.0 or later. If omitted, the user profiles will be exported to a CSV file in the format for Garoon version 3.1.0 and later.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Data type: User profiles
- Character encoding: UTF-8
- Header row: Exported item name

On Windows:

```
.\grn.exe -C -q code\command\export_user.csp charset=UTF-8 title=1 > user.csv
```

On Linux:

```
./grn.cgi -C -q code/command/export_user.csp charset=UTF-8 title=1 > user.csv
```

Note

- When a CSV file is specified as a relative path, a CSV file is exported to the directory from where the command executed.

Deleting User Data for Deleted Users

Use the command line to delete user information, permissions, and notifications for users who have been deleted. You can delete user data by specifying the target user.

Command

```
delete_user.csp
```

Parameters

Parameters	Required item	Description
login_name		The input type of this argument is a string (one line). Specify the login name of the user to delete data. Only users who have been deleted can be specified.
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Login Name: sato

On Windows:

```
.\grn.exe -C -q code\command\delete_user.csp login_name=sato
```

On Linux:

```
./grn.cgi -C -q code/command/delete_user.csp login_name=sato
```

Note

- When you work with the System Administration screen, you can set the time period for automatically deleting user data of deleted users.
  For details, see Setting the Time to Delete User Data(88Page).
- When you execute the command, logs are stored in the following files:
  - On Windows:
    C:\inetpub\scripts\cbgrn\delete_user.log
  - On Linux:
    /var/www/cgi-bin/cbgrn/delete_user.log
- For details on logs, see the command execution log(1735Page).

3.5.3. Commands for Scheduler

This section describes the scheduling commands.

Deleting Appointments in Bulk

Use the command line to delete all appointments that have been completed before the specified date in bulk.

Caution

- After deleting appointments, they cannot be recovered. If you do not want to delete an appointment, you can exclude it from deletion changing its content or adding comments to update the end date.

Command

```
delete_schedules.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes the data. If omitted, the number of appointments to be deleted is displayed. Data are not deleted.
before	✔	The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to delete based on. Deletes appointments with end dates earlier than the specified date.
max_count		The input type of this argument is an integer. Specify the maximum number of appointments you want to delete. To use this argument, you must use exec.
max_duration		The input type of this argument is an integer. Specify the maximum amount of time to perform the deletion process in minutes. If the deletion process continues after the specified period of time, the

Parameters	Required item	Description
		process ends. To use this argument, you must use exec. • Minimum value: 1 • Maximum value: 2147483647
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Delete data before: May 30, 2011
- The maximum duration of the deletion process: 3 hours (180 minutes)

On Windows:

```
.\grn.exe -C -q code\command\delete_schedules.csp exec before=2011-05-30 max_duration=180
```

On Linux:

```
./grn.cgi -C -q code/command/delete_schedules.csp exec before=2011-05-30 max_duration=180
```

Note

- When you execute the command, logs are stored in the following files:
  - On Windows:
    C:\inetpub\scripts\cbgrn\delete_schedules.log
  - On Linux:
    /var/www/cgi-bin/cbgrn/delete_schedules.log
- For details on logs, see the command execution log(1735Page).

3.5.4. Commands for Messages

You can use the command line to perform the following actions on messages:

- Deleting All Messages That Have Not Been Updated since the Specified Date
- Deleting Permissions to Change and Delete Messages

Deleting Messages That Have Not Been Updated in Bulk

Deletes all messages that have not been updated since the specified date.

When you delete a message, the notifications and attachments for the message are also deleted.

Caution

- After deleting messages, they cannot be retrieved. If you do not want to delete a message, you can exclude it from deletion changing its content or adding comments to update the last updated date.

Command

```
delete_messages.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes the data. If omitted, the number of messages to be deleted is displayed. Data are not deleted.
before	✔	The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to delete based on. Deletes messages that have not been updated since the specified date.
max_count		The input type of this argument is an integer. Specify the maximum number of messages you want to delete. To use this argument, you must use exec.

Parameters	Required item	Description
max_duration		The input type of this argument is an integer. Specify the maximum amount of time to perform the deletion process in minutes. If the deletion process continues after the specified period of time, the process ends. To use this argument, you must use exec. • Minimum value: 1 • Maximum value: 2147483647
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Delete data before: May 30, 2011
- The maximum duration of the deletion process: 3 hours (180 minutes)

On Windows:

```
.\grn.exe -C -q code\command\delete_messages.csp exec before=2011-05-30 max_duration=180
```

On Linux:

```
./grn.cgi -C -q code/command/delete_messages.csp exec before=2011-05-30 max_duration=180
```

Note

- When you execute the command, logs are stored in the following files:
  - On Windows:
    C:\inetpub\scripts\cbgrn\delete_messages.log
  - On Linux:
    /var/www/cgi-bin/cbgrn/delete_messages.log
- For details on logs, see the command execution log(1735Page).

Deleting Permissions to Edit or Delete Messages

Deletes permissions that are set to the receiving users of the messages to change and delete them.
Delete permission is a permission given to users who is set to "Maintainers" in "Allow to edit and delete topic" to delete messages from the recipient's inbox. For details on how to view users who have been granted permissions, see View Recipient Details.

Caution

- After deleting permissions to change and delete messages, they cannot be restored.

Command

```
delete_messages_maintainer.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes permissions. If omitted, displays the number of messages from which the permissions will be deleted. Data are not deleted.
before	✔	The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to delete based on. Deletes permissions granted before the specified date.
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Delete data before: May 30, 2011

On Windows:

```
.\grn.exe -C -q code\command\delete_messages_maintainer.csp before=2011-05-30 exec
```

On Linux:

```
./grn.cgi -C -q code/command/delete_messages_maintainer.csp before=2011-05-30 exec
```

Note

- When you execute the command, logs are stored in the following files:
  - For Windows

    C:\inetpub\scripts\cbgrn\delete_messages_maintainer.log
  - On Linux

    /var/www/cgi-bin/cbgrn/delete_messages_maintainer.log
- For details on logs, see the command execution log(1735Page).

3.5.5. Commands for Bulletin Board

You can use the command line to perform the following actions on Bulletin Board:

- Delete expired topics in bulk
- Delete all topics that have not been updated since the specified date

Deleting Expired Topics in Bulk

Deletes expired topics.

Caution

- After deleting topics, they cannot be recovered.

Command

```
delete_bulletin_over.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes the data. If omitted, the number of topics to be deleted displayed. Data are not deleted.
max_count		The input type of this argument is an integer. Specify the maximum number of topics to delete. To use this argument, you must use exec.
max_duration		The input type of this argument is an integer. Specify the maximum amount of time to perform the deletion process in minutes. If the deletion process continues after the specified period of time, the process ends. To use this argument, you must use exec. • Minimum value: 1 • Maximum value: 2147483647
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Maximum number of topics to delete: 10000

On Windows:

```
.\grn.exe -C -q code\command\delete_bulletin_over.csp exec max_count=10000
```

On Linux:

```
./grn.cgi -C -q code/command/delete_bulletin_over.csp exec max_count=10000
```

Note

- When you execute the command, logs are stored in the following files:
  - On Windows:
    C:\inetpub\scripts\cbgrn\delete_bulletin_over.log
  - On Linux:
    /var/www/cgi-bin/cbgrn/delete_bulletin_over.log

- For details on logs, see the command execution log(1735Page).

Deleting Topics That Have Not Been Updated in Bulk

Deletes all topics that have not been updated since the specified date.

When you delete a topic, the notifications and attachments for the topic are also deleted.

Caution

- After deleting topics, they cannot be recovered. If you do not want to delete a topic, you can exclude it from deletion changing its content or adding comments to update the last updated date.

Command

```
delete_bulletins.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes the data. If omitted, the number of topics to be deleted displayed. Data are not deleted.
before	✔	The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to delete based on. Topics last updated before the specified date are deleted.
max_count		The input type of this argument is an integer. Specify the maximum number of topics to delete. To use this argument, you must use exec.
max_duration		The input type of this argument is an integer. Specify the maximum amount of time to perform the deletion process in minutes. If the deletion process continues after the specified period of time, the

Parameters	Required item	Description
		process ends. To use this argument, you must use exec. • Minimum value: 1 • Maximum value: 2147483647
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Delete data before: May 30, 2011
- The maximum duration of the deletion process: 3 hours (180 minutes)

On Windows:

```
.\grn.exe -C -q code\command\delete_bulletins.csp exec before=2011-05-30 max_duration=180
```

On Linux:

```
./grn.cgi -C -q code/command/delete_bulletins.csp exec before=2011-05-30 max_duration=180
```

Note

- When you execute the command, logs are stored in the following files:
  - On Windows:
    C:\inetpub\scripts\cbgrn\delete_bulletins.log
  - On Linux:
    /var/www/cgi-bin/cbgrn/delete_bulletins.log
- For details on logs, see the command execution log(1735Page).

3.5.6. Commands for E-Mails

This section describes e-mail commands.

Deleting Incoming E-Mails in Bulk

Use the command line to delete e-mails that have been received before the specified date, regardless of the destination folder.
You can delete incoming e-mails by specifying the target users.

Caution

- After deleting incoming e-mails, they cannot be recovered.

Command

```
delete_mails.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes the data. If omitted, the number of e-mails to be deleted displayed. Data are not deleted.
login_name		The input type of this argument is a string (one line). Specify the login name of the user. Deletes the incoming e-mails of the specified user. If omitted, it applied to all users.
before	✔	The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to delete based on. Deletes e-mails that have been received before the specified date.
max_duration		The input type of this argument is an integer. Specify the maximum amount of time to perform the deletion process in

Parameters	Required item	Description
		minutes. If the deletion process continues after the specified period of time, the process ends. To use this argument, you must use exec. • Minimum value: 1 • Maximum value: 2147483647
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Delete data before: May 30, 2011
- To be deleted: the incoming e-mails of the login name "sato"

On Windows:

```
.\grn.exe -C -q code\command\delete_mails.csp login_name=sato before=2011-05-30 exec
```

On Linux:

```
./grn.cgi -C -q code/command/delete_mails.csp login_name=sato before=2011-05-30 exec
```

Note

- When you execute the command, logs are stored in the following files:
  - For Windows
    C:\inetpub\scripts\cbgrn\delete_mails.log
  - On Linux
    /var/www/cgi-bin/cbgrn/delete_mails.log
- For details on logs, see the command execution log(1735Page).

3.5.7. Commands to Initialize Garoon

Use the command line to initialize the data and settings that you added and changed after Garoon started running.
You can install standard data during initialization.

Caution

- If you want to perform initialization, you must stop the scheduling service before running the command.
  Restart the scheduling service after running the initialize command.
  For details, refer to "Steps to Execute Commands(1706Page)".
- After initializing data, it cannot be restored.
- If you cancel the initialization process while it is in progress, Garoon may become unusable. If you cancel the initialization process midway, roll back Garoon to its pre-initialization state, and start the initialization process again from the beginning.

For Windows

Initialize Garoon in a Windows environment.

Command

```
cd C:\inetpub\scripts\cbgrn\initialize
Initialize.bat (language) "(MySQL installation directory)"(password)
```

Parameters

Parameters	Required item	Description
language	✔	The input type of this argument is a string (one line). Specify the language for which you want to display commands. Example: • ja Enter this if you want to specify Japanese. • en Enter this if you want to specify English.

Parameters	Required item	Description
		• zh Enter this if you want to specify Chinese.
MySQL installation directory	✔	The input type of this argument is a string (one line). Specify a path for the directory where MySQL is installed.
password		The input type of this argument is a string (one line). Specify the database administrator password. If omitted, after you execute the command, a field for the database administrator password is displayed.

The language and time zone of the following locales are set automatically for the language that is displayed on the command screen:

Display Language	Locale Language	Time Zone
ja	日本語	Asia/Tokyo
en	English	Europe/London
zh	Simplified Chinese	Asia/Shanghai

Execution Example

Assuming the example setting below, the command usage is as follows:

- Language: ja
- MySQL installed directory: C:\Program Files\Cybozu\mysql-5.0
- Password: cybozu

```
cd C:\inetpub\scripts\cbgrn\initialize
initialize.bat ja "C:\Program Files\Cybozu\mysql-5.0" cybozu
```

Note

- Execute Initialize.bat, then a message stating that "enter "Y" if the message is displayed correctly" appears. If you enter "N" to it, the display language will be in English.

- When you execute the command, logs are stored in the following files:
  C:\inetpub\scripts\cbgrn\grn_initialize.log
- For details on logs, see the command execution log(1735Page).

For Linux

Initialize Garoon in a Linux environment.

Command

```
grn_initialize.csp
```

Parameters

Parameters	Required item	Description
db_admin_password	✔	The input type of this argument is a string (one line). Specify the database administrator password.
db_user_password	✔	The input type of this argument is a string (one line). Specify the database user password.
garoon_admin_password	✔	The input type of this argument is a string (one line). Specify the Garoon administrator password.
default_timezone	✔	The input type of this argument is a string (one line). Specify the default time zone as time zone code. For details, see the time zone list(1791Page).
default_locale	✔	The input type of this argument is a string (one line). Specify the default language. Example: • ja Enter this if you want to specify Japanese. • en Enter this if you want to specify English.

Parameters	Required item	Description
		• zh Enter this if you want to specify Chinese.
force_initialize		Specifies whether to display or hide the message confirming to initialize or not. Specify one of the following values: • yes The confirmation message does not appear. When you execute the command, initializing Garoon starts. • no A confirmation message appears. If you type "yes" and press the Enter key, initializing Garoon starts.
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Database administrator password: cybozu
- Database user password: cybozu
- Garoon administrator password: cybozu
- Default time zone: Tokyo (Asia/Tokyo)
- Default language: Japanese (ja)

```
./grn.cgi -C -q code/command/grn_initialize.csp db_admin_password=cybozu db_user_password=cybozu
garoon_admin_password=cybozu default_timezone=Asia/Tokyo default_locale=ja
```

Note

- When you execute the command, logs are output to the following files:
  /var/www/cgi-bin/cbgrn/grn_initialize.log

- For details on logs, see the command execution log(1735Page).

3.5.8. Commands for Logs

You can use the command line to perform the following actions on logs:

- Deleting Logs in Bulk
- Exporting Log Data to CSV File
- Archiving Logs

Deleting Logs in Bulk

Deletes logs generated earlier than the specified date.

Caution

- After deleting logs, they cannot be recovered.

Command

```
delete_loggings.csp
```

Parameters

Parameters	Required item	Description
exec		Deletes the data. If omitted, the number of logs to be deleted is displayed. Data are not deleted.
before		The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to delete based on.

Parameters	Required item	Description
		The log data that was generated earlier than the specified date will be deleted. If omitted, all logs will be deleted.
max_duration		The input type of this argument is an integer. Specify the maximum amount of time to perform the deletion process in minutes. If the deletion process continues after the specified period of time, the process ends. To use this argument, you must use exec. • Minimum value: 1 • Maximum value: 2147483647
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Delete data before: 2011
- The maximum duration of the deletion process: 3 hours (180 minutes)

On Windows:

```
.\grn.exe -C -q code\command\delete_loggings.csp exec before=2011-05-30 max_duration=180
```

On Linux:

```
./grn.cgi -C -q code/command/delete_loggings.csp exec before=2011-05-30 max_duration=180
```

Note

- When you execute the command, logs are stored in the following files:
  - For Windows
    C:\inetpub\scripts\cbgrn\delete_loggings.log
  - On Linux
    /var/www/cgi-bin/cbgrn/delete_loggings.log
- For details on logs, see the command execution log(1735Page).

Exporting Log Data to CSV Files

Exports the log data to a CSV file.

Command

```
export_loggings.csp
```

Parameters

Parameters	Required item	Description
before	✔	The input type of this argument is a string (one line). Type YYYY-MM-DD. Specify the date that the data to export CSV file based on. Exports logs generated earlier than the specified date to a CSV file.
charset		Specify the character encoding of the CSV file to export. Youo can use the following character codes: • SJIS-win • UTF-8 • ASCII • ISO-8859-1 • GB2312 • TIS-620 If omitted, the value in "default_external_encoding" of the config file common.ini is used. The default value is SJIS-win.
title		Specify one of the following values: • YES The item name is exported to the first row of the CSV file. • No The item name is not exported to the CSV file. If omitted, the item name will not be exported to the CSV file.
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Export data before: May 30, 2011
- Character encoding: UTF-8
- Header row: Exported item name
- Destination file name: Logdata.csv

On Windows:

```
.\grn.exe -C -q code\command\export_loggings.csp before=2011-05-30 charset=UTF-8 title=YES > logdata.csv
```

On Linux:

```
./grn.cgi -C -q code/command/export_loggings.csp before=2011-05-30 charset=UTF-8 title=YES > logdata.csv
```

Archiving Logs

Archive logs older than 91 days or more to a file. If the database does not have old logs, no archiving will be performed.

Caution

- Archived logs are deleted from the database.

Note

- You can change the archive file format in the System Administration archive settings(306Page). The default value is in XLSX format.
- The maximum number of weeks that can be archived is 50 weeks.
- The maximum number of lines that can be archived per day of archival execution is 500,000 lines.
- The maximum number of rows per log file is 100,000 lines. If the logs to archive exceeds 100,000 lines, two or more files will be generated in one archive execution.

Command

```
archive_log.csp
```

Parameters

Parameters	Required item	Description
max_week		The input type of this argument is an integer. Specify the time frame in week to archive logs from the oldest log. If omitted, three weeks are applied. • Minimum value: 1 • Maximum Value: 50
help		Displays help for this command.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Archived Time Frame: 10 weeks from oldest output date

On Windows:

```
.\grn.exe -C -q code\command\archive_log.csp max_week=10
```

On Linux:

```
./grn.cgi -C -q code/command/archive_log.csp max_week=10
```

Note

- When you execute the command, logs are stored in the following files:
    - archive_log.log
      The information in the archived logs is stored.
        - On Windows: C:\inetpub\scripts\cbgrn\archive_log.log
        - On Linux: /var/www/cgi-bin/cbgrn/archive_log.log
    - delete_log_file.log
      Information of archives deleted from the server is stored.
        - On Windows: C:\inetpub\scripts\cbgrn\delete_log_file.log
        - On Linux: /var/www/cgi-bin/cbgrn/delete_log_file.log

- For details on logs, see the command execution log(1735Page).

3.5.9. Command Execution Log

When you execute a command to delete data or initialize Garoon, the following messages appear in the log file:

Deleting user data for deleted users:

```
2019-10-20 17:45:06 Garoon: Version 5.x.x
2019-10-20 17:45:06 [server system information]
2019-10-20 17:45:06 Command Line Parameters: [parameters specified when you executed the command]
2019-10-20 17:45:06 Starting
2019-10-20 17:45:06 Deleted the [application name that is applied the deletion process] data of user "[target user name to be deleted]"
2019-10-20 17:45:07 Deleted user "[login name of the target user to be deleted]"
2019-10-20 17:45:07 Done in [processing time]: Deleted [number of users deleted]
```

Deleting data for each application:

When you delete schedules, messages, bulletin boards, or e-mail data, the following messages appear in the log file

```
2019-10-20 13:36:59 Writing to log file: [execute log filepath]
2019-10-20 13:36:59 Garoon: Version 5.x.x
2019-10-20 13:36:59 [server system information]
2019-10-20 13:36:59 Command Line Parameters: parameters specified when you executed the command
2019-10-20 13:36:59 Starting
2019-10-20 13:37:07 Deleted [ID of data deleted]
2019-10-20 13:37:07 Committed.
2019-10-20 13:37:07 Done in [processing time]: Deleted [number of data deleted]
```

Garoon initialization:

```
2019-10-28 13:13:26 Writing to log file: [execute log filepath]
2019-10-28 13:13:26 Garoon: Version 5.x.x
2019-10-28 13:13:26 [server system information]
2019-10-28 23:13:26 Command Line Parameters: [parameters specified when you executed the command]
```

```
2019-10-28 23:13:26 Starting
2019-10-28 23:14:20 [processing time]
```

3.5.10. Commands for Full-Text Search

You can use the command line to perform the following actions on full-text search:

- Creating Indexes
- Updating Indexes

Creating Indexes

You can use the command line to create indexes on the full-text search server.
For DB distributed Garoon, run the command on the server where you want to administer queues.

Caution

- The server running Garoon has a high load while the indexes are being created. Create indexes outside of business hours.

Note

- Full-Text search is also available while the index is being created.
- For details on creating indexes, see "Creating Indexes" in the full-text search server guide.

Command

Execute commands in the FTS directory.

```
fts/full_index.csp
```

Parameters

Parameters	Required item	Description
number	✔	The input type of this argument is a string (one line). Specify how many indexes a process creates at one time. Specify 50 unless otherwise specified.
startTime		The input type of this argument is an integer. Specify the time in 24-hour notation where you want to start indexing. • Minimum value: 0 • Maximum value: 23 Set the time in the time zone that is set to the default value of the locale on the Garoon System Administration screen. For details, see Setting up a Default Locale(566Page). StartTime and stopTime are specified in pair. The same value cannot be specified for startTime and stopTime.
stopTime		The input type of this argument is an integer. Specify the time in 24-hour notation to stop indexing. • Minimum value: 0 • Maximum value: 23 Set the time in the time zone that is set to the default value of the locale on the Garoon System Administration screen. For details, see Setting up a Default Locale(566Page). StartTime and stopTime are specified in pair. The same value cannot be specified for startTime and stopTime.

Execution Example

Assuming the example setting below, the command usage is as follows:

- Number of indexes created by the process at a time: 50
- Start time: 20:00
- End time: 8:00 on the next day

On Windows:

```
.\grn.exe -C -q code\command\fts\full_index.csp number=50 startTime=20 stopTime=8
```

On Linux:

```
./grn.cgi -C -q code/command/fts/full_index.csp number=50 startTime=20 stopTime=8
```

Updating Indexes

You can use the command line to update indexes on the full-text search server.
For details on updating indexes, see how to upgrade in single-machine deployment in the Installation Guide.

Index updates can be updated during business hours, because the load on Garoon is low.
For DB distributed Garoon, run the command on the server where you want to administer queues.

Note

- Full-text search is available even while updating indexes.
- When "Finish indexing of message data." appears and you can search messages in Garoon, the index update process is completed.

Command

Execute commands in the FTS directory.

```
fts/update_index.csp
```

Parameters

Parameters	Required item	Description
exec	✔	Update indexes.

Execution Example

On Windows:

```
.\grn.exe -C -q code\command\fts\update_index.csp exec
```

On Linux:

```
./grn.cgi -C -q code/command/fts/update_index.csp exec
```

4 chapter Specifications

This section lists information such as the Garoon search specification, the limit of input characters, and the default value of system settings.

References

- Specifications for Search(1739Page)
- CSV File Format(1801Page)
- Feature and Application Default Value List(1913Page)
- List of Maximum Number of Input Characters(2036Page)

4.1. Search Specifications

This section describes the search specifications available in Garoon.

Search Overview

Provides an overview of Garoon search.

The following two types of search functions are available for Garoon

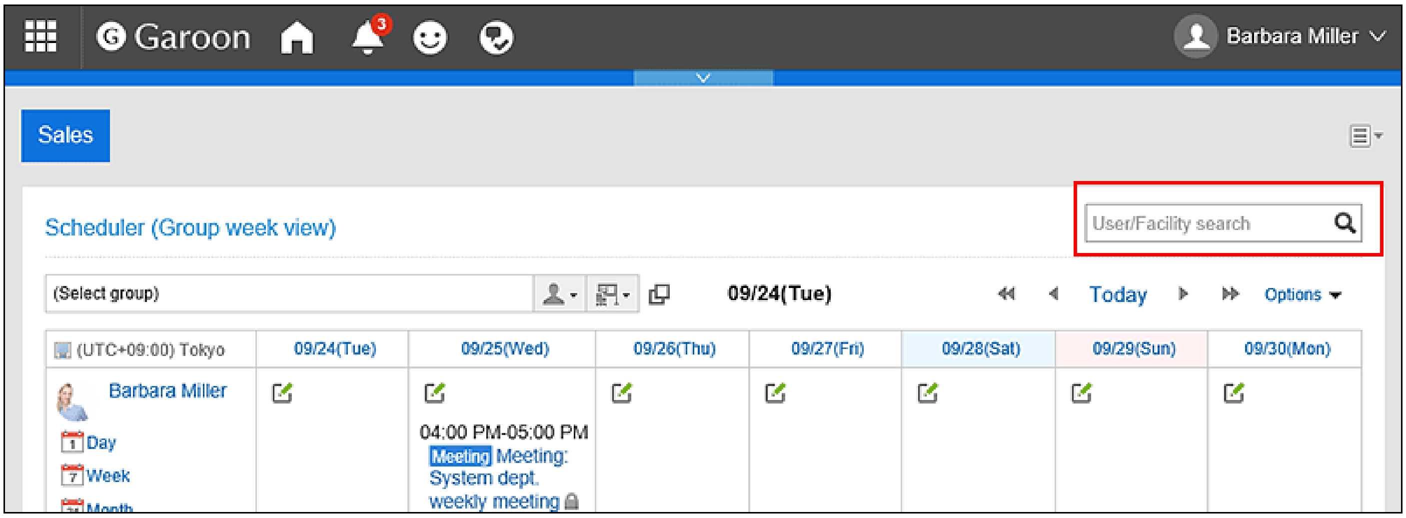
- **Standard Search**
  This is a search function installed in Garoon standard.
- **Full Text Search**
  This search function is available when the full text Search server is installed and the full Text Search Server service license is enabled.

Standard Search

The standard search searches data in one application.

Search the search box in the upper right corner of each application.

For details, refer to the standard search specification(1744Page).



Full Text Search

A full text search is a way to search across applications.

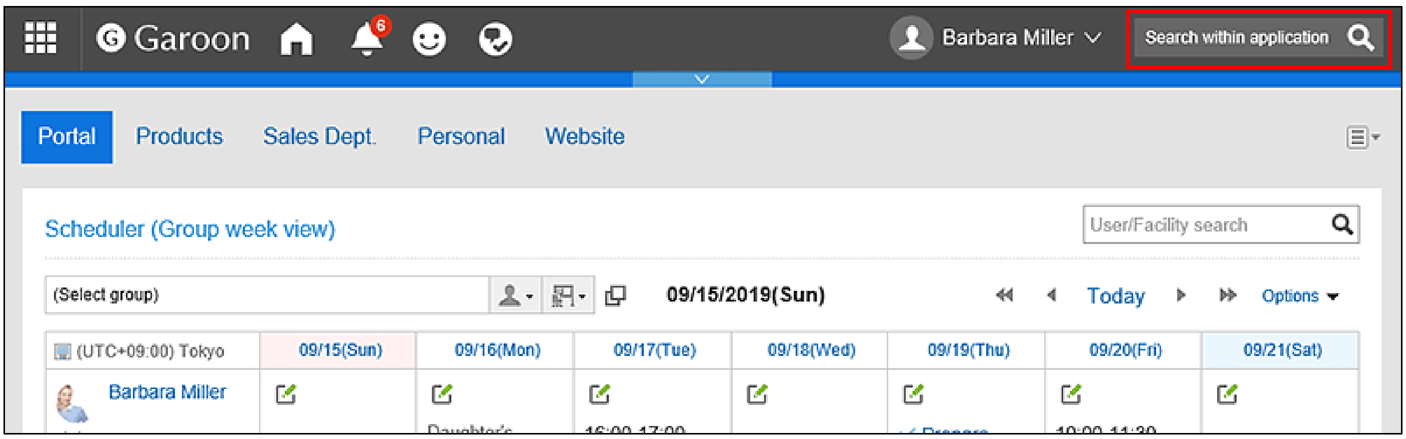
The following applications support full text Search

- Space
- Messages
- Bulletin Board
- Cabinet
- E-mail

In full text search, search is possible, including the attachment name and the contents of the file.

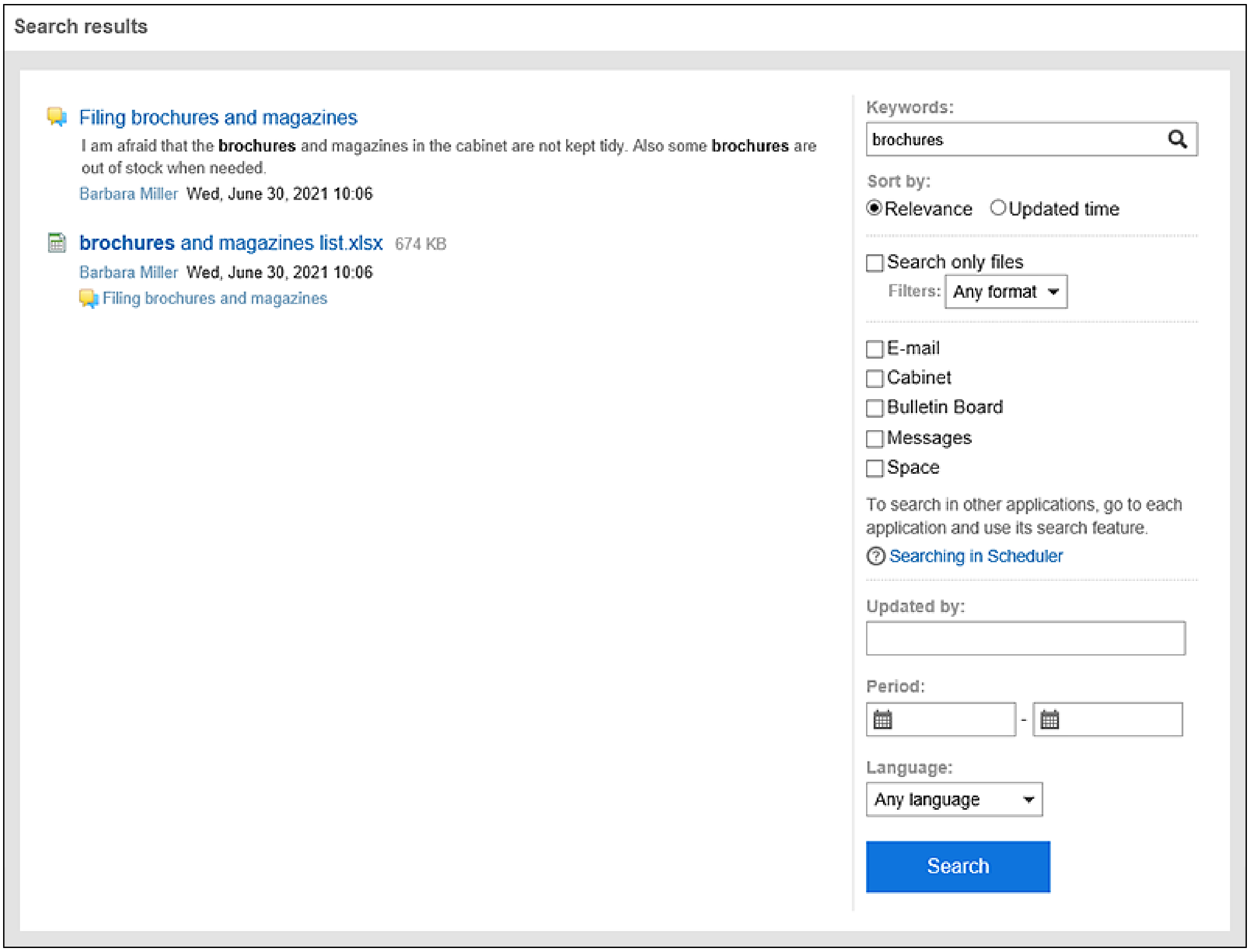
For details, refer to the Search Files in Full Text Search(1775Page).

If you want to search through an application that supports full text search, search the search box in the header.



On the search results screen of full text search, you can set search conditions and filter search results using the following options

- Keyword:
  Enter the keywords you want to search.
- Sort by:
  Set the display order of search results.
- Show only files/search subject
  Sets the items to be searched. The "Show only Files" and "search subject" cannot be used together.
- Application:
  Select the applications you want to search. You can select multiple applications.
- Updated by:
  You can filter the search target with an updated user.
- Period:
  Set the period to search.
- Language:
  Set the language that you want to search.



Search Target List for Standard Search and Full Text Search

In "Garoon standard search" and "Full text search", applications for search are different.

If you want to search data for applications that do not support full text search, use Garoon standard search.

Note

- Full Text search is available when the full text Search server is installed and the full Text Search Server service license is enabled.

List of Applications for Each Search Function

You can check the specifications for each search by clicking the ✔.

	Full text search	Standard Search
User search		✔(1745Page)
Space	✔(1777Page)	✔(1748Page)
Bookmarks		✔(1749Page)
Scheduler		✔(1751Page)
Messages	✔(1781Page)	✔(1754Page)
Bulletin Board	✔(1783Page)	✔(1756Page)
Cabinet	✔(1786Page)	✔(1758Page)
Memo		✔(1760Page)
Phone Messages		✔(1761Page)

	Full text search	Standard Search
Address Book		✔(1763Page)
E-mail	✔(1789Page)	✔(1765Page)
Workflow		✔(1767Page)
MultiReport		✔(1769Page)
Notifications		✔(1771Page)

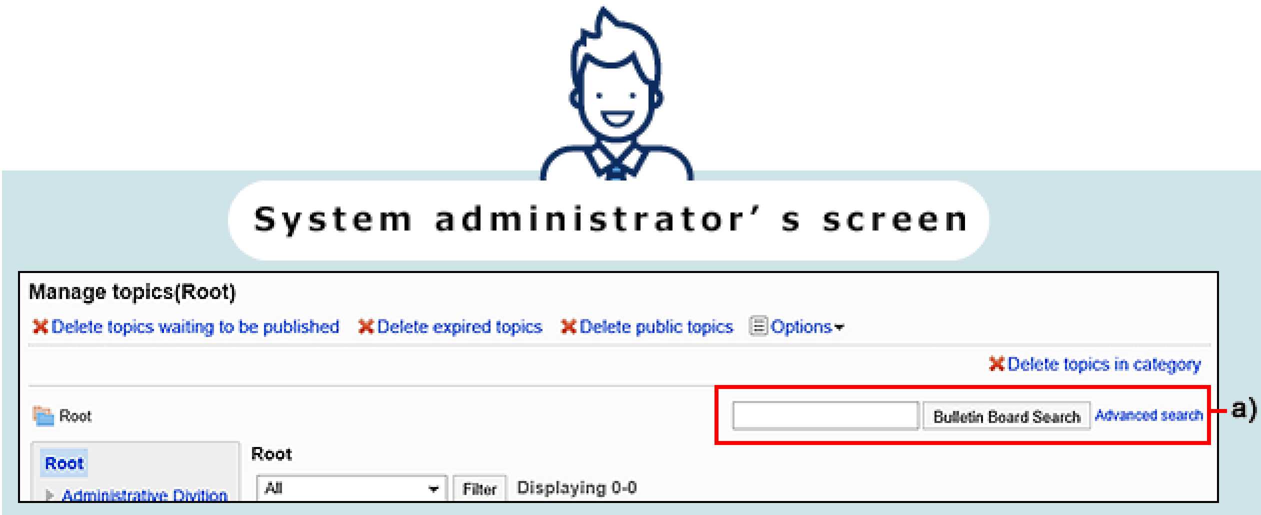
Search Available to Users

In Garoon, the available search functions differ between the system administration screen and the user screen.

System Administration Screen

When you search from the System Administration screen, you can search each application for data that the system administrator can view. The general user is not available.

On the System Administration screen, the position of the search box is different from the user screen.

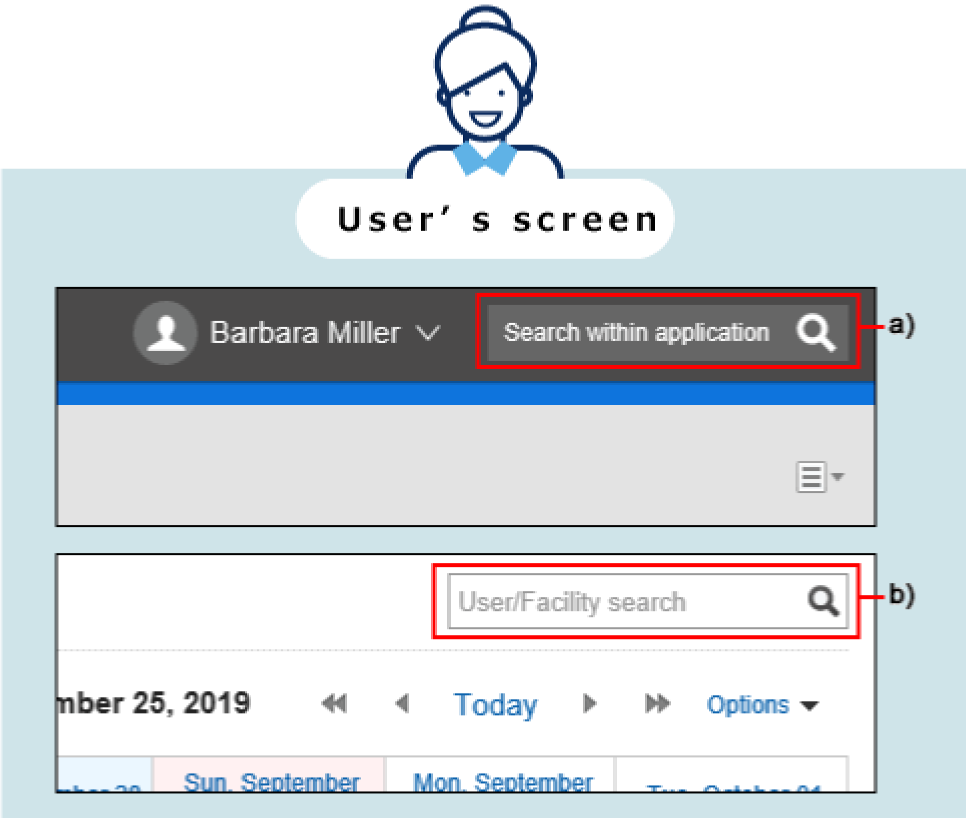


a): Search for each application that is displayed on the System Administration screen

User Screens

To search from the user screen, you can use full text search and standard search.

The user has a different search function and search target.



a): Full text Search

b): Search for each application

Note

- Full Text search is available when the full text Search server is installed and the full Text Search Server service license is enabled.

4.1.1. Specifications for Standard Search

This section describes the standard search specifications for each application.

Note

- The standard search distinguishes lower cases and upper cases.

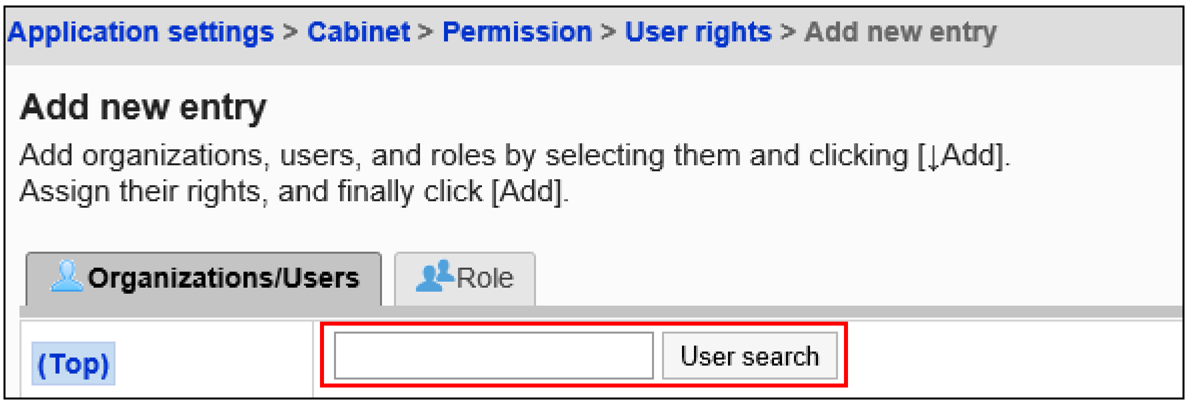
References

- User Search Specifications(1745Page)
- Space Search Specifications(1748Page)
- Search Specifications for Links(1749Page)
- Search Specifications for Scheduler(1751Page)
- Search Specifications for Messages(1754Page)
- Bulletin Board Search Specifications(1756Page)
- Search Specifications for File Management(1758Page)
- Notes Search Specifications(1760Page)
- Phone Message Search Specifications(1761Page)
- Search Specifications in the Address Book(1763Page)
- Search Specifications for E-mails(1765Page)
- Workflow Search Specifications(1767Page)
- Search Specifications for Multireport(1769Page)
- Search specifications in the notifications list(1771Page)

4.1.1.1. Search Specifications for Users

Describes the user search specifications.

This topic explains what you can search on the screen, including Add new entry screen under system administration screen.



When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.

The following items can be searched by entering keywords in the search box.

Users

Search items	Remarks
Name (Display name)	
Name (Localized name)	
Login name	
Pronunciation	
E-mail	You can search e-mail addresses registered in the user information.
Job title	You can search the position (job title) that has been added to the user information.
Custom items	On the "User Information Items" screen, you can search for customized items with the following settings enabled • Enable • Search in

Log

Search items	Remarks
Contents	
User name	
Login name	
Host Name	
IP addresses	

Items That Can Be Searched in the User Screen

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.

The specification of the user search in Scheduler is different. When multiple keywords are separated by single-byte or

double-byte spaces, it performs an OR search. For details, refer to the items that can be searched on the user screen(1752Page) in the search specifications for Scheduler.
The following items can be searched by entering keywords in the search box on the user screen

Users

Search items	Remarks
Name (Display name)	
Name (Localized name)	
Login name	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
Pronunciation	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
E-mail	On the "User Information Items" screen, when the following settings are enabled, the e-mail addresses registered in the user information can be searched. • Enable • Make public
Job title	You can search the job title that has been added to the user information.
Custom items	On the "User Information Items" screen, you can search for customized items with the following settings enabled • Enable • Make public • Search in

4.1.1.2. Search Specifications for Spaces

The fields can be searched in the system administration screen and the user screen.

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Categories

Search items	Remarks
Category names	You can use "category settings" to search for a destination category.

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Discussions

Separating each keyword with a space, such as multiple titles and body text, allows an and search.

Search items	Remarks
Subject	
User name	
Body	
Comment	

Shared To-Do Assignees

Search items	Remarks
Name (Display name)	
Name (Localized name)	

Search items	Remarks
Login name	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
Pronunciation	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
E-mail	On the "User Information Items" screen, when the following settings are enabled, the e-mail addresses registered in the user information can be searched. • Enable • Make public
Job title	You can search the position (job title) that has been added to the user information.
Custom items	On the "User Information Items" screen, you can search for customized items with the following settings enabled • Enable • Make public • Search in

4.1.1.3. Search Specifications for Bookmarks

The fields that can be searched in the links are different from the system administration screen and the user screen.

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Categories

Search items	Remarks
Category names	This is used when searching for a destination of a shared category.

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Categories

Search items	Remarks
Category names	Searches for category names that are registered in the same language as the user language. You cannot search for categories that do not have user rights.

Link

Search items	Remarks
Subject	
URL	

Options Available for Search

On the "Search" screen, you can set search conditions and filter search results using the following options

- Search string
  Enter search keywords.
- Search category
  Select whether to search within the currently selected category, or search all categories.
- Sub categories
  Select to search for a sub-category.

- Search period
  Searches updated data within the specified period.
- Search items
  Select an item to search.

4.1.1.4. Search Specifications for Scheduler

Describes the scheduler search specification.

Items That Can Be Searched in the System Administration Screen

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.
The following items can be searched in the system administration screen by entering keywords in the search box

Facilities

Search items	Remarks
Facility Name	You can search the name of a facility with the same display name as the language that is used by the user.
Memo	

Facility Group

Search items	Remarks
Facility Group	You can search the facility group name with the same display name as the language that is used by the user.

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Appointment

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.

Search items	Remarks
Subject	The search target is a menu name and an entry field.
Company information	The search target is the company name.
Memo	
Comment	

Users

When multiple keywords are separated by single-byte or single-byte spaces, an OR search is possible.

Search items	Remarks
Name (Display name)	
Name (Localized name)	
Login name	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
Pronunciation	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
E-mail	On the "User Information Items" screen, when the following settings are enabled, the e-mail addresses registered in the user information can be searched. • Enable • Make public

Search items	Remarks
Job title	You can search the position (job title) that has been added to the user information.
Custom items	On the "User Information Items" screen, you can search for customized items with the following settings enabled • Enable • Make public • Search in

Facilities

When multiple keywords are separated by single-byte or single-byte spaces, an OR search is possible.

Search items	Remarks
Facilities	You can search the facility name of the display name in the language that is used by the user.
Memo	You can search them if the system administrators have selected "Show" in the "Show notes in appointment lists" in "Change Facility Reservation Settings(890Page)".

Options Available for Search

On the "Appointment search" screen, you can search by using the following options

- Search string:
  Enter the keywords you want to search.
- Search Items:
  Select an item to search. You can select multiple items.
  - Subject
  - Company information
  - Memo
  - Comment
- Search Period:
  Set the period to search.

- Search in:
  Specify the users and organizations you want to search.
- Repeating appointments:
  Select to search all repeating appointments.

4.1.1.5. Search Specifications for Messages

Describes the search specifications for messages.

The following messages cannot be searched.

- Draft messages
- Trash messages

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Messages

Search items	Remarks
Subject	
Body	
Comment	
From	
Recipients	

Items That Can Be Searched in the User Screen

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.

The following items can be searched by entering keywords in the search box on the user screen

Messages

Search items	Remarks
Subject	
Body	
From	
Recipients	
Comment	

Notes on Specifying "From" in Search Fields

If the sender's name has been changed since the time the message was sent and sent, the search results display both the name of the user before and after the change.

Example: A symptom occurs in the following steps

1. Message1 is sent by Mr. Satomi Kojima.
2. The message2 is sent by Mr. Kengo Kojima.
3. The Message3 is sent by Hiroshi Kojima.
4. Satomi Kojima is renamed Kojima Satomi.
5. Select "From" to search for messages in "Kojima".
   Operation results
   Message1 and Message2 are displayed in the search results.

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Search string:
  Enter the keywords you want to search.

- Search folders:
  Select the folder you want to search.
- Subfolders:
  Select to search subfolders.
- Search Period:
  Searches updated data within the specified period.
- Search Items:
  Select an item to search. You can select multiple items.
  - Subject
  - Body
  - From
  - Recipients
  - Comment

4.1.1.6. Bulletin Board Search Specifications

This section describes the topic search specifications.
The following topics cannot be searched:

- Posting a draft
- Topic Awaiting topic
- Expired topics

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Categories

Search items	Remarks
Category names	You can search the category name of the same display name as the language that is used by the user.

Topic

Search items	Remarks
Subject	
Body	
From	
Comment	

Items That Can Be Searched in the User Screen

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.
The following items can be searched by entering keywords in the search box on the user screen

Categories

Search items	Remarks
Category names	You can search the category name of the same display name as the language that is used by the user. You cannot search for categories that do not have user rights.

Topic

Search items	Remarks
Subject	
Body	
From	
Comment	

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Search string:
  Enter the keywords you want to search. Case-sensitive search is possible.
- Search category:
  Select whether to search within the currently selected category, or search all categories.
- Search in Subcategory:
  Select to search sub-categories.
- Search Period:
  Searches updated data within the specified period.
- Search Items:
  Select an item to search. You can select multiple items.
  - Category names
  - Subject
  - Body
  - From
  - Comment

4.1.1.7. Search Specifications for Cabinet

This section describes the search specifications for file management.

The following files cannot be searched:

- Trash files
- Old generation Files

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Folder

Search items	Remarks
Folder names	You can search the folder name of the same display name as the language that is used by the user.

File

Search items	Remarks
Subject	
File name	
File description	
Created by	
Updated by	

Items That Can Be Searched in the User Screen

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.
The following items can be searched by entering keywords in the search box on the user screen

Folder

Search items	Remarks
Folder names	You can search the folder name of the same display name as the language that is used by the user. You cannot search folders for which you do not have user rights.

File

The following items cannot be searched.

- Updated information
- Updated comment

Search items	Remarks
Subject	
File name	
File description	
Created by	

Search items	Remarks
Updater	

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Search string:
  Enter the keywords you want to search.
- Search folders:
  Select whether to search the currently selected folder, or search all folders.
- Subfolders:
  Select to search subfolders.
- Search Period:
  Searches updated data within the specified period.
- Search Items:
  Select an item to search. You can select multiple items.
  - Folder names
  - File name
  - Subject
  - File description
  - Created by
  - Updater

4.1.1.8. Search Specifications for Memo

Notes can be searched only on the user screen.

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Memo

Search items	Remarks
Subject	
Body	

File

Search items	Remarks
Subject	
File description	

Options Available for Search

On the "Search notes" screen, you can set search conditions and filter search results using the following options

- Search string
  Enter search keywords. Case-sensitive search is possible.
- Search Folder
  Select whether to search in the currently selected folder or all folders.
- Subfolder Search
  Select to search for subfolders.
- Search period
  Searches updated data within the specified period.
- Search items
  Select an item to search.

4.1.1.9. Search Specifications for Phone Messages

Phone messages can be searched only on the user screen.

Items That Can Be Searched in the User Screen

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.

The following items can be searched by entering keywords in the search box on the user screen

Phone Messages

Search items	Remarks
Users	Search for users who are displayed in the phone notes.

Phone Messages History

Search items	Remarks
Message	
Recipient Name	
Caller name	

Options Available for Search

Phone Messages

On the "Search phone Messages" screen, you can set search conditions and filter search results using the following options

- Search string
  Enter search keywords. Case-sensitive search is possible.

Phone Messages History

On the "Phone Message History Search" screen, you can set search conditions and filter search results using the following options.

- Search string:
  Enter search keywords. Case-sensitive search is possible.
- Search in:
  Select the target for which you want to search phone message history.
- Search Items:
  Select an item to search. You can select multiple items.
  - Message
  - Recipient Name

    - Caller name

- State:
  Select the status of the phone message history you want to search.

4.1.1.10. Search Specifications in Address Book

The address book can be searched only on the user screen.

Items That Can Be Searched in My Address Groups

When you want to change addresses in the My address group, you can search data in the user list and the Address Book.
For each search field, refer to the following page
Items that can be searched in the user screen(1746Page)
Items that can be searched in the Personal address Book

Items That Can Be Searched in User List

For items that can be searched in the user list, refer to fields that can be searched on the user screen(1746Page).

Items That Can Be Searched in Personal Address Books

When multiple keywords are separated by single-byte or single-byte spaces, then search is possible.
The following items can be searched in the address book

Address

Search items	Remarks
Name	
Name of individual	
Pronunciation	

Search items	Remarks
Company Name	
Company Name (pronunciation)	
Division Name	
Zip code	
Address	
Office Phone Number	
Company FAX Number	
URL	
Job Title	
Personal Phone Number	
E-mail	
Memo	

Custom Items

You can search if the item has been set to "use" in the settings.

Search items	Remarks
String (one line)	
Fields in multiple lines	
URL Item	
Image URL Items	
E-mail items	

Search items	Remarks
IP Phone Items	

Options Available for Search

Search "User List" Screen

You can set search conditions and filter search results using the following options

- Search string
  Enter search keywords. Case-sensitive search is possible.

Address Book Search Screen

You can set search conditions and filter search results using the following options

- Search string
  Enter search keywords. Case-sensitive search is possible.
- Search Book
  Select the book you want to search.

4.1.1.11. Search Specifications for E-mails

This section describes the search specifications for e-mails.

The following e-mails cannot be searched:

- E-mails that have not been marked as read

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

E-mail

Search items	Remarks
Subject	
Body	
From	
To	
Cc	
Bcc	

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Search string:
  Enter the keywords you want to search.
- Search e-mail account:
  Select to search Folders for all e-mail accounts.
- Search folders:
  Select the e-mail account and folder you want to search.
- Subfolders:
  Select to search subfolders.
- Search Period:
  Searches updated data within the specified period.
- Search Items:
  Select an item to search. You can select multiple items.
  - Subject
  - Body
  - From
  - To
  - Cc
  - Bcc

4.1.1.12. Search Specifications for Workflow

Describes the workflow search specification.

The request data for the draft cannot be searched.

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Request Data

Search items	Remarks
Status	
Date and time	
Number	
Subject	
Applicant	
Input field (string)	The following types of items are searched. • String (one line) • String (multiple lines)

Note

- You can search from the request data using the selected request form.

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Request Data

Search items	Remarks
Number	
Request Form name (string)	
Subject	
Status	
Request Date	
Applicant	
Input field (string)	The view permission must be set. The following types of items are searched. • String (one line) • String (Multiple lines)
Priority	

Note

- You can search from the request data using the selected request form.

Options Available for Search

On the "Search request Data" screen, you can search by using the following options

- Search in:

  Select the list to search.

  - Recent list
  - Inbox list
  - Sent items list
  - Proxy approval list
  - Approval appointment list
  - Public list

- Number of Displays:
  Select the number of search results to show.
- Search conditions:
  You can search for the desired request data combining items that can be searched on the user screen and conditional expressions.

4.1.1.13. Search Specifications for Multireport

This section describes the search specifications for Multireport.

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Categories

Search items	Remarks
Category names	You can search the category name of the same display name as the language that is used by the user.

Reports

You cannot search the draft report.

Search items	Remarks
Subject	
Created on	
Created by	
Item	The following types of items are searched. • String (one line) • String (Multiple lines)

Search items	Remarks
	• Radio button
Item (Details)	You can set search conditions for each item that is set for the report form.
Comment	

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Reports

Search items	Remarks
Form name	
Created on	
Created by	
Item	The following types of items are searched. • String (one line) The type of subject is also a string (one line). • String (Multiple lines) • Radio button
Item (Details)	When you select a report form, you can set search conditions for each item that is set in the report form.
Comment	

Options Available for Search

On the "Search for reports" screen, the following options can be used to filter searches

- Folder:
  Select the folder you want to search.

  - Inbox list
  - Sent items list
  - Draft
  - Available reports

- Report Form
  Search based on the form name in the report form.
- Search conditions:
  Searches the target report by combining an item with an expression.

4.1.1.14. Search Specifications for Notifications

The notification list can be searched only on the user screen.

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Notifications

Search items	Remarks
Subject	
Space	
Contents	
Name	

Options Available for Search

On the "Search Notifications" screen, you can set search conditions and filter search results using the following options

- Search string

  Enter search keywords.
- Search items

  Select an item to search.

4.1.2. Full Text Search Specifications

This section describes the full text search specifications.

References

- Search Keywords(1772Page)
- Search Files in Full Text Search(1775Page)

4.1.2.1. Search Keywords

This section describes search keywords that are entered in the search box in full text search.

Note

- The full-text search does not distinguish between half-width and full-width characters.

How to Search

This section describes search methods available for full text search.

Single-Keyword Search

Enter only one keyword you want to search.

AND Search

Use the and search to search data that contains all the specified keywords.

Inserts a space or a "and" between keywords.

Example:

Garoon AND Office AND kintone

Garoon Office kintone

OR Search

Use OR search when you want to search data with one of the specified keywords.

Inserts an "OR" between keywords.

Example:

Garoon OR Office OR kintone

NOT Search

If you want to search data that excludes keywords after NOT, use NOT search.

- If you want to search a keyword by filtering out a certain keyword, you can enter "keyword to be searched NOT keyword to be excluded".
  Example:
  Cybozu NOT Garoon

Phrase Search

When you want to search data that are lined up in the same order that you entered, use phrase search.

Enclose the phrase you want to search in double quotation marks.

Example:

"Cybozu Garoon"

Symbols That Can Be Used in Search

The following symbols can be used in full-text search.

```
#+_
```

Symbols That Cannot Be Used in Search

Garoon does not support wildcard search.
Any of the following symbols in a search keyword is interpreted as a space in a search process.
If you enter "bulletin*board" as your search keyword, characters will be interpreted as "bulletin board" and show the same result as a phrase search.

```
\!"$%&'()*,-./:;<=>?@[]^`{|}~
```

Notes on Searching in Japanese and Chinese

To search data other than category names in Bulletin board and folder names in Cabinet, the keyword must be one or more characters.
Example of searching data with a value of "Japanese"

- Keywords you can search
  "Japan", "English", or "Japanese"
- Keywords cannot be searched.
  Day, book, or Word

Note

- A word of one character can be searched with a keyword of one character.

Notes on Searching with Alphanumeric Characters

Data other than category names in Bulletin Board and folder names in Cabinet can be searched by a word.
Alphanumeric characters separated by a space or a double-byte character will be recognized as a word.
Searching is not case-sensitive.
Example of searching data with a value of "Garoon":

- Keywords you can search
  "garoon"
- Keywords cannot be searched.
  "Gar"

4.1.2.2. Files That Can Be Searched by Full Text Search

You can search file contents using the full text search function of Garoon.
The following file formats can be searched.

Product or file format	Version or type
Microsoft Word	• Windows version Word 95, 97, 98, 2000, 2002 (XP), 2003, 2007, 2010, 2013, 2016, and 2019 • MacOS version: Word 98, 2001, 2004, 2008, 2011, 2016, and 2019
Microsoft Excel	• Windows version Excel 95, 97, 2000, 2002 (XP), 2003, 2007, 2010, 2013, 2016, and 2019 • MacOS version: Excel 98, 2001, 2004, 2008, 2011, 2016, and 2019
Microsoft PowerPoint	• Windows version PowerPoint 95, 97, 2000, 2002 (XP), 2003, 2007, 2010, 2013, 2016, and 2019 • MacOS version: PowerPoint 98, 2001, 2004, 2008, 2011, 2016, and 2019
Microsoft Visio	Visio 2002 (XP), 2003, 2007, 2010, 2013, 2016, and 2019
ODF	• Version: 1.1, 1.2 • Type: ◦ Writer (document Document) ◦ Calc (spreadsheet) ◦ Impress (presentation file)
OpenOffice	3.0, 3.1, 3.2, and 3.3
LibreOffice	3.4
Acrobat	4.0, 5.0, 6.0, 7.0, 8.0, 9.0, X, XI, and DC

Product or file format	Version or type
PDF	1.2, 1.3, 1.4, 1.5, 1.6, and 1.7
JUSTSYSTEM Ichitaro	• Ver.13 from Ver.5 • From 2004 to 2015
Microsoft XML Paper Specification(XPS)	1.0
RTF	1.0 to 1.9
Other	• Text document encoded in the following character code JIS(ISO-2022-JP), EUC-JP, Shift_JIS, UTF-8, and UTF-16 • Markup language HTML, XML, SGML

Note

- The maximum size of the file that can be searched is 50 MB.
- If you upgraded the full text Search server from version 2.0.1 to version 2.0.2 or later, the file size limit of 50 MB is applied to files uploaded after upgrade.
  After upgrading to version 2.0.2 or later, the index can be re-created to search files up to 50MB file size, including files uploaded before version 2.0.1.
  For details, see the Full Text Search Server Guide.
- Full Text Search server extracts text data from the file to be searched then creates the index. You can search up to 1,048,576 characters from the beginning of the extracted text.
- The encrypted files can also be searched. Although the 256-bit AES encryption for Acrobat X and later is not supported.
- Unicode characters in the Private Use Area (for example, user defined characters) may not be searched. and incorrect search results may appear.

4.1.2.3. Specification of Full Text Search for Spaces

The fields can be searched in the system administration screen and the user screen.

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

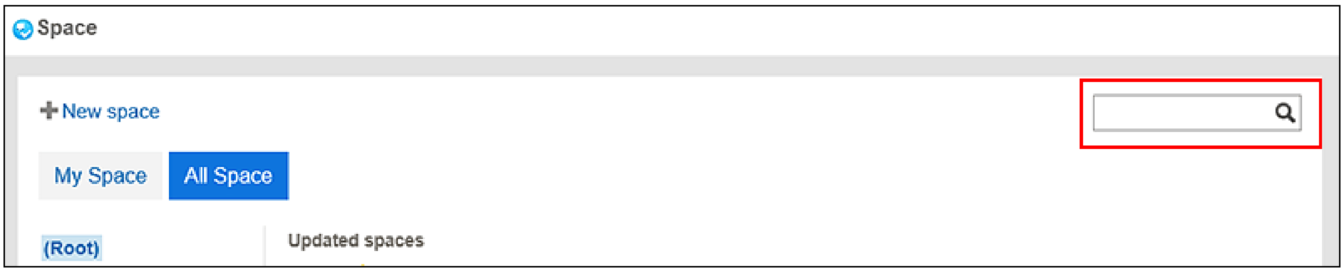
Categories

Search items	Remarks
Category names	You can use "category settings" to search for a destination category.

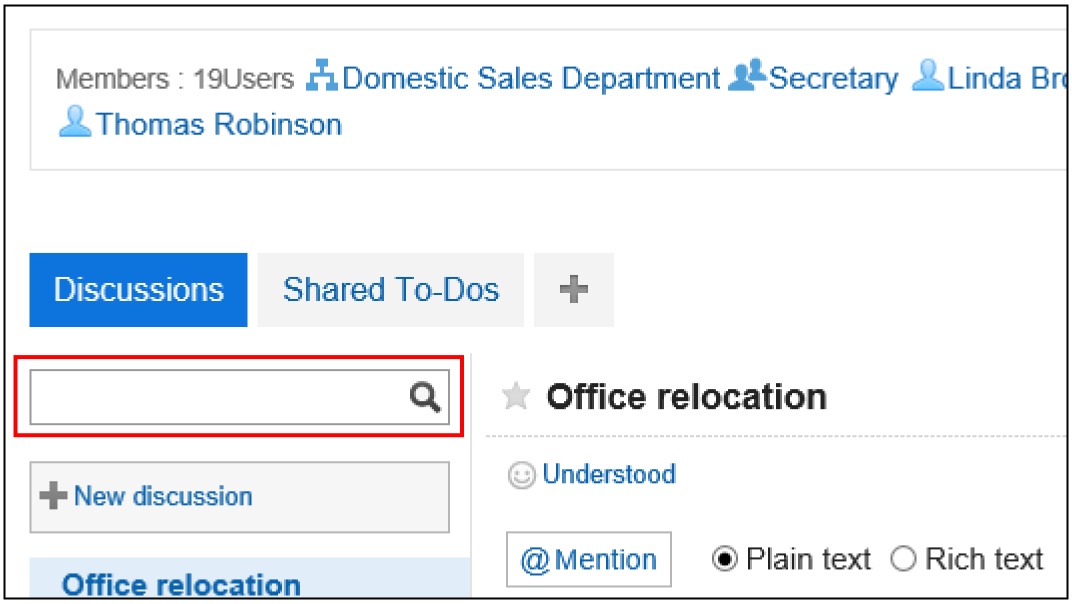
Items That Can Be Searched in the User Screen

Use the search boxes in the following screens to search for data. The data to be searched differs depending on the screen.

- "My Space" or "All Spaces" screen:
  Searches data across spaces.
  When you select the "My Space" tab, you can search from my space.
  To search from all spaces, select the **All Spaces** tab.



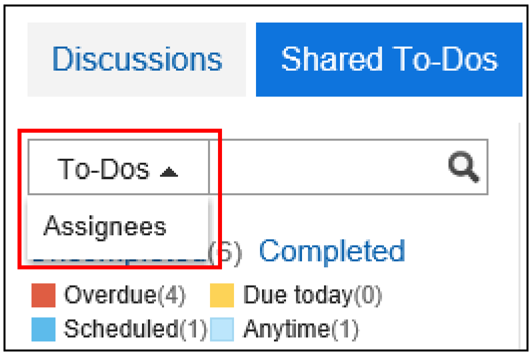
- "Space" screen:
  Searches discussions in a specific space



- "Shared To-Do" screen:

  Searches shared To-Dos in a particular space.

  Use the drop-down list in the search box to change the search target.



The following items can be searched by entering keywords in the search box.

Discussions

Search items	Remarks
Subject	
Body	
Comment	
Attachment file name	
Attachment contents	For a searchable file format, refer to full text Search file(1775Page).

Shared To-Do

Search items	Remarks
To-Do	
Contents	
Comment	
Attachment file name	
Attachment contents	For a searchable file format, refer to full text Search file(1775Page).

Shared To-Do Assignees

Search items	Remarks
Name (Display name)	
Name (Localized name)	
Login name	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
Pronunciation	On the "User Information Items" screen, you can search if the following settings are enabled • Enable • Make public
Email	On the "User Information Items" screen, when the following settings are enabled, the e-mail addresses registered in the user information can be searched. • Enable • Make public
Job title	You can search the job title that has been added to the user information.
Custom items	On the "User Information Items" screen, you can search for customized items with the following settings enabled

Search items	Remarks
	• Enable • Make public • Search in

Note

- Up to one million spaces can be searched.

Options Available for Search

On the "Search results" screen, you can set search conditions and filter search results using the following options

- Display order
  Search results can be displayed in the specified order. The display order can be specified as follows
  - Relevance:
    This item is displayed in order of relevance, based on the frequency of keywords and the spacing of keywords in the data.
  - Updated:
    The updated date and time are displayed in the new order.
- Show only files/search title
  Specify conditions for the search. "Search only files" and "Search discussion & To-Do names" cannot be used at the same time.
  - Show only files
    Finds data that contains keywords in the attachment file name. You can filter by attachment type.
  - Search Title
    Searches for data that contains keywords in discussions and shared to-do titles.
- Search in
  Searches the search target. The following can be searched
  - Discussions
  - Shared To-Do
- Updated by
  Filters the search results by the last user who updated data.
- Period
  Filters the search results by the last updated date.

- If you want to specify only the start date:
  Searches data updated from the specified date to the current period.
- To specify the end date only:
  Searches updated data from the earliest updated date to the specified date period.

- language
  Filters the search results by the language.

4.1.2.4. Specification of Full Text Search for Messages

Describes the search specifications for messages.

The following messages cannot be searched.

- Draft messages
- Trash messages

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Messages

Search items	Remarks
Subject	
Body	
Comment	
From	
Recipients	

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Messages

Search items	Remarks
Subject	
Body	
Comment	
Attachment file name	
Attachment contents	For a searchable file format, refer to full text Search file(1775Page).

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Keyword:
  Enter the keywords you want to search.
- Sort by:
  Set the display order of search results.
  - Relevance:
    This item is displayed in order of relevance, based on the frequency of keywords and the spacing of keywords in the data.
  - Updated:
    The updated date and time are displayed in the new order.
- Show only files/search subject
  Sets the items to be searched. The "Show only Files" and "search subject" cannot be used together.
  - Show only files
    Finds data that contains keywords in the attachment file name. You can filter by attachment type.
  - Search subjects:
    Searches data containing keywords in subject.
- Search folders:
  Set the folder that you want to search in.
- From:
  You can filter the search target using the message sender. In the "From" field, enter the display name of the user. You can also empty the "keywords" field and search only messages from the "from" field.

- Period:
  Set the period to search.
  - If only the start date is specified:
    Searches data updated from the specified date to the current period.
  - If only the end date is specified:
    Finds data updated in the period from the oldest data to the specified date.

- Language:
  Set the language that you want to search.

4.1.2.5. Specification of Full Text Search for Bulletin Board

This section describes the topic search specifications.
The following topics cannot be searched:

- Posting a draft
- Topic Awaiting topic
- Expired topics

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Categories

Search items	Remarks
Category names	You can search the category name of the same display name as the language that is used by the user.

Topic

Search items	Remarks
Subject	
Body	
From	
Comment	

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Categories

Search items	Remarks
Category names	You can search the category name of the same display name as the language that is used by the user. You cannot search for categories that do not have user rights.

Topic

Search items	Remarks
Subject	
Body	
Comment	
Attachment file name	
Attachment contents	For a searchable file format, refer to full text Search file(1775Page).

Note

- You can search up to 10000 categories, including subcategories.

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Keyword:
  Enter the keywords you want to search.
- Search in:
  Set what you want to search.
  - Topic
  - Category name
    You can search the category and the category name of that subcategory.
    If you have selected a category other than root, search all categories is displayed.
    Select to search all categories in bulletin board.

- Sort by:
  Set the display order of search results.
  - Relevance:
    This item is displayed in order of relevance, based on the frequency of keywords and the spacing of keywords in the data.
  - Updated:
    The updated date and time are displayed in the new order.
- View only files/titles:
  Sets the items to be searched. "Search only files" and "Search discussion & To-Do names" cannot be used at the same time.
  - Show only files
    Finds data that contains keywords in the attachment file name. You can filter by attachment type.

    - Search title:
      Searches for data with keywords in the title.

- From:
  You can filter the search target using the message sender. In the "From" field, enter the display name of the user.
- Period:
  Set the period to search.
    - If you want to specify only the start date:
      Searches data updated from the specified date to the current period.
    - To specify the end date only:
      Finds data updated in the period from the oldest data to the specified date.

- Language:
  Set the language that you want to search.

4.1.2.6. Full Text Search Specifications for Cabinet

This section describes the search specifications for file management.

The following files cannot be searched:

- Trash files
- Old generation Files

Items That Can Be Searched in the System Administration Screen

The following items can be searched in the system administration screen by entering keywords in the search box

Folder

Search items	Remarks
Folder names	You can search the folder name of the same display name as the language that is used by the user.

File

Search items	Remarks
Subject	
File name	
File description	
Created by	
Updated by	

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

Folder

Search items	Remarks
Folder names	You can search the folder name of the same display name as the language that is used by the user. You cannot search folders for which you do not have user rights.

File

The following items cannot be searched.

- Updated information
- Updated comment

Search items	Remarks
Subject	
File name	
File description	
File contents	For a searchable file format, refer to full text Search file(1775Page).

Note

- You can search up to 10,000 folders, including subfolders.

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Keyword:

  Enter the keywords you want to search.
- Search in:

  Set what you want to search.
  - Files
  - Folder name:

    Select "Folder Name".

    Folder names in the selected folder and its sub folders can be searched.

    If you have selected a folder other than the root, "Search all Folders" is displayed.

    Select to target all folders in the file administration.

- Sort by:

  Set the display order of search results.
  - Relevance:

    This item is displayed in order of relevance, based on the frequency of keywords and the spacing of keywords in the data.
  - Updated:

    The updated date and time are displayed in the new order.
- Filter by

  You can select which file type you want to search.

- Updated by:
  You can filter the search target by the last user who updated the file. In the "updated by" field, enter the display name of the user.
- Period:
  Set the period to search.
  - If you want to specify only the start date:
    Searches data updated from the specified date to the current period.
  - To specify the end date only:
    Finds data updated in the period from the oldest data to the specified date.
- Language:
  Set the language that you want to search.

4.1.2.7. Specification of Full Text Search for E-Mails

This section describes the search specifications for e-mails.
The following e-mails cannot be searched:

- E-mails that have not been marked as read
- Draft e-mails
- Trash Mail

Items That Can Be Searched in the User Screen

The following items can be searched by entering keywords in the search box on the user screen

E-mail

Search items	Remarks
Subject	
Body	
From	
To	

Search items	Remarks
Cc	
Bcc	
Attachment file name	
Attachment contents	For a searchable file format, refer to full text Search file(1775Page).

Options Available for Search

On the "Search results" screen, you can search by using the following options

- Keyword:
  Enter the keywords you want to search.
- Sort by:
  Set the display order of search results.
  - Relevance:
    This item is displayed in order of relevance, based on the frequency of keywords and the spacing of keywords in the data.
  - Updated:
    The updated date and time are displayed in the new order.
- Search subjects:
  Search e-mails containing keywords in subject.
- Search folders:
  Set the folder that you want to search in.
- From:
  You can filter the search target using the e-mail sender. Enter a name or part of the e-mail address in the "from" field.
  You can also empty the "keywords" field and search only the e-mail of the sender you entered in the "from" field.
- To, Cc, Bcc:
  You can filter searches by e-mail recipients.
  You can also empty the "keywords" field and search only e-mail recipients entered in the "to, Cc, and Bcc" fields.
- Period:
  Set the period to search.

- Language:
  Set the language that you want to search.

4.2. Time Zone

This section describes the time zones available for Garoon.
Garoon uses the time zone data published in the following WEB sites
http://pecl.php.net/package/timezonedb

The time zones available for Garoon are as follows:

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
Cairo	Africa/Cairo	UTC+02:00	
Casablanca	Africa/Casablanca	UTC+01:00	UTC+00:00
Johannesburg	Africa/Johannesburg	UTC+02:00	
Lagos	Africa/Lagos	UTC+01:00	
Nairobi	Africa/Nairobi	UTC+03:00	
Windhoek	Africa/Windhoek	UTC+02:00	
Anchorage	America/Anchorage	UTC-09:00	UTC-08:00
Buenos aires	America/Argentina/Buenos_Aires	UTC-03:00	
Asuncion	America/Asuncion	UTC-04:00	UTC-03:00
Bogota	America/Bogota	UTC-05:00	
Caracas	America/Caracas	UTC-04:00	

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
Cayenne	America/Cayenne	UTC-03:00	
Chicago	America/Chicago	UTC-06:00	UTC-05:00
Chihuahua	America/Chihuahua	UTC-07:00	UTC-06:00
Cuiabá	America/Cuiaba	UTC-04:00	UTC-03:00
Denver	America/Denver	UTC-07:00	UTC-06:00
Godhope	America/Godthab	UTC-03:00	UTC-02:00
Guatemala	America/Guatemala	UTC-06:00	
Halifax	America/Halifax	UTC-04:00	UTC-03:00
Indianapolis	America/Indiana/Indianapolis	UTC-05:00	UTC-04:00
La paz	America/La_Paz	UTC-04:00	
Los angeles	America/Los_Angeles	UTC-08:00	UTC-07:00
Manaus	America/Manaus	UTC-04:00	
Mexico city	America/Mexico_City	UTC-06:00	UTC-05:00
Montevideo	America/Montevideo	UTC-03:00	
New york	America/New_York	UTC-05:00	UTC-04:00
Phoenix	America/Phoenix	UTC-07:00	
Regina	America/Regina	UTC-06:00	
Santiago	America/Santiago	UTC-04:00	UTC-03:00
Sao paulo	America/Sao_Paulo	UTC-03:00	UTC-02:00

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
St. johns	America/St_Johns	UTC-03:30	UTC-02:30
Tijuana	America/Tijuana	UTC-08:00	UTC-07:00
Almaty	Asia/Almaty	UTC+06:00	
Amman	Asia/Amman	UTC+02:00	UTC+03:00
Baghdad	Asia/Baghdad	UTC+03:00	
Baku	Asia/Baku	UTC+04:00	
Bangkok	Asia/Bangkok	UTC+07:00	
Beirut	Asia/Beirut	UTC+02:00	UTC+03:00
Colombo	Asia/Colombo	UTC+05:30	
Damascus	Asia/Damascus	UTC+02:00	UTC+03:00
Dhaka	Asia/Dhaka	UTC+06:00	
Dubai	Asia/Dubai	UTC+04:00	
Irkutsk	Asia/Irkutsk	UTC+08:00	
Jerusalem	Asia/Jerusalem	UTC+02:00	UTC+03:00
Kabul	Asia/Kabul	UTC+04:30	
Kamchatka	Asia/Kamchatka	UTC+12:00	
Karachi	Asia/Karachi	UTC+05:00	
Kathmandu	Asia/Kathmandu	UTC+05:45	
Kolkata	Asia/Kolkata	UTC+05:30	

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
Krasnoyarsk	Asia/Krasnoyarsk	UTC+07:00	
Magadan	Asia/Magadan	UTC+11:00	
Novosibirsk	Asia/Novosibirsk	UTC+07:00	
Yangon	Asia/Yangon	UTC+06:30	
Riyadh	Asia/Riyadh	UTC+03:00	
Seoul	Asia/Seoul	UTC+09:00	
Beijing	Asia/Shanghai	UTC+08:00	
Singapore	Asia/Singapore	UTC+08:00	
Taipei	Asia/Taipei	UTC+08:00	
Tashkent	Asia/Tashkent	UTC+05:00	
Tbilisi	Asia/Tbilisi	UTC+04:00	
Tehran	Asia/Tehran	UTC+03:30	UTC+04:30
Tokyo	Asia/Tokyo	UTC+09:00	
Ulaanbaatar	Asia/Ulaanbaatar	UTC+08:00	
Vladivostok	Asia/Vladivostok	UTC+10:00	
Yakutsk	Asia/Yakutsk	UTC+09:00	
Ekaterinburg	Asia/Yekaterinburg	UTC+05:00	
Yerevan	Asia/Yerevan	UTC+04:00	
Azores	Atlantic/Azores	UTC-01:00	UTC-00:00

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
Cabo Verde Republic	Atlantic/Cape_Verde	UTC-01:00	
Reykjavik	Atlantic/Reykjavik	UTC+00:00	
South Georgia Island	Atlantic/South_Georgia	UTC-02:00	
Adelaide	Australia/Adelaide	UTC+09:30	UTC+10:30
Brisbane	Australia/Brisbane	UTC+10:00	
Darwin	Australia/Darwin	UTC+09:30	
Hobart	Australia/Hobart	UTC+10:00	UTC+11:00
Perth	Australia/Perth	UTC+08:00	
Sydney	Australia/Sydney	UTC+10:00	UTC+11:00
Berlin	Europe/Berlin	UTC+01:00	UTC+02:00
Budapest	Europe/Budapest	UTC+01:00	UTC+02:00
Istanbul	Europe/Istanbul	UTC+03:00	
Kiev	Europe/Kiev	UTC+02:00	UTC+03:00
London	Europe/London	UTC+00:00	UTC+01:00
Minsk	Europe/Minsk	UTC+03:00	
Moscow	Europe/Moscow	UTC+03:00	
Paris	Europe/Paris	UTC+01:00	UTC+02:00
Warsaw	Europe/Warsaw	UTC+01:00	UTC+02:00
Mauritius	Indian/Mauritius	UTC+04:00	

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
Appeia	Pacific/Apia	UTC+13:00	UTC+14:00
Auckland	Pacific/Auckland	UTC+12:00	UTC+13:00
Fiji	Pacific/Fiji	UTC+12:00	UTC+13:00
Guadalcanal	Pacific/Guadalcanal	UTC+11:00	
Honolulu	Pacific/Honolulu	UTC-10:00	
Port moresby	Pacific/Port_Moresby	UTC+10:00	
Tongatapu	Pacific/Tongatapu	UTC+13:00	
UTC	UTC	UTC+00:00	
UTC-10	Etc/GMT+10	UTC-10:00	
UTC-11	Etc/GMT+11	UTC-11:00	
UTC-12	Etc/GMT+12	UTC-12:00	
UTC-1	Etc/GMT+1	UTC-01:00	
UTC-2	Etc/GMT+2	UTC-02:00	
UTC-3	Etc/GMT+3	UTC-03:00	
UTC-4	Etc/GMT+4	UTC-04:00	
UTC-5	Etc/GMT+5	UTC-05:00	
UTC-6	Etc/GMT+6	UTC-06:00	
UTC-7	Etc/GMT+7	UTC-07:00	
UTC-8	Etc/GMT+8	UTC-08:00	

Region	Value	Time difference (standard)	Difference between (Daylight-saving time)
UTC-9	Etc/GMT+9	UTC-09:00	
UTC	Etc/GMT	UTC+00:00	
UTC+10	Etc/GMT-10	UTC+10:00	
UTC+11	Etc/GMT-11	UTC+11:00	
UTC+12	Etc/GMT-12	UTC+12:00	
UTC+1	Etc/GMT-1	UTC+01:00	
UTC+2	Etc/GMT-2	UTC+02:00	
UTC+3	Etc/GMT-3	UTC+03:00	
UTC+4	Etc/GMT-4	UTC+04:00	
UTC+5	Etc/GMT-5	UTC+05:00	
UTC+6	Etc/GMT-6	UTC+06:00	
UTC+7	Etc/GMT-7	UTC+07:00	
UTC+8	Etc/GMT-8	UTC+08:00	
UTC+9	Etc/GMT-9	UTC+09:00	

4.3. File I/O List

This section describes Garoon data that can be input and output by file.

Click the to check the steps to input and output data.

If You Are a System Administrator

The following files can be used by system administrators to input and output data and to input and output data.

CSV File

Data	Input	Output
Users Organization Role	✔(161Page)	✔(163Page)
Applications (IP addresses of external usage settings)	✔(227Page)	✔(228Page)
Application (Users)	✔(230Page)	✔(231Page)
MIME Type	✔(245Page)	✔(246Page)
Events	✔(294Page)	✔(295Page)
Office Data	✔(297Page)	✔(298Page)
log		✔(321Page)
HTML Portlet Name PHP portlet name	✔(719Page)	✔(721Page)
Space	✔(790Page)	✔(791Page)
Links (Shared links/separator lines)	✔(830Page)	✔(831Page)
User Rights	✔(832Page)	✔(834Page)
Scheduler	✔(937Page)	✔(939Page)
Bulletin Board	✔(1012Page)	✔(1013Page)
Cabinet	✔(1068Page)	✔(1069Page)
User Rights	✔(1085Page)	✔(1087Page)

Data	Input	Output
Timesheet		✔(1099Page)
Address Book	✔(1150Page)	✔(1152Page)
E-mail	✔(1210Page)	✔(1212Page)
Workflow • Category • Category names • Access Permissions • Operational Administrative Privileges[1] • Proxy Applicant • Proxy Approver	✔(1474Page)	✔(1475Page)
Workflow (Request data)		✔(1483Page)
MultiReport • Category • Category names • Access Permissions	✔(1585Page)	✔(1586Page)
Multireport (report data)		✔(1590Page)
Presence Confirmation (proxy)	✔(1605Page)	✔(1607Page)
KUNAI (permission)	✔(1644Page)	✔(1646Page)

[1]: Available in Garoon version 5.9.0 or later.

XML File

Data	Input	Output
HTML portlet data PHP portlet data	✔(718Page)	✔(718Page)
Workflow (shared route)	✔(1477Page)	✔(1479Page)
Workflow (Request form)	✔(1480Page)	✔(1482Page)

Data	Input	Output
Multireport (Report form)	✔(1588Page)	✔(1589Page)

For Users

The following files are available for users to input and output data to and from data.

CSV File

Data	Input	Output
My Calendar events	✔	✔
Appointment data	✔	✔
Scheduler statistical data		✔
Timesheet		✔
- Personal Address Book	✔	✔

Text File

Data	Input	Output
Messages		✔
Topic		✔
Memo		✔
E-mail		✔

XML File

Data	Input	Output
HTML portlet data	✔	✔

iCalendar

Data	Input	Output
Appointment data		✔

Note

- Users can input and output e-mail data in the following formats in their personal settings
  - UNIX mbox format
  - EML format Please refer the following page for details.

    Import from a File

    Export to a File

4.4. CSV File Format

This section describes the CSV file format for each data.

For information on importing and exporting CSV files, refer to the description of each application.

References

- File I/O List(1797Page)
- Notes on Creating a CSV File(1802Page)
- Organizations/Users/Roles(1804Page)
- Scheduler(1835Page)

4.4.1. Notes on Creating a CSV File

An item for describing data in a CSV file is called a field.

To properly import a CSV file, you must be aware of the following points and describe the data correctly in the field.

Caution

- If an error occurs while importing a CSV file, Garoon will stop importing the CSV file. The data which has been imported will be eliminated.
- The CSV file will not be imported if the number of items in the CSV file does not match the number of items to import.
  However, the number of items are not checked in the following cases.
  - Organizations/Users/Roles
    - Organization details(1804Page)
    - Organization name data(1807Page)
    - User profile(1808Page)
    - Role details(1815Page)
  - Calendars
    - Office Name(1824Page)
  - Portal
    - HTML Portlet Name(1825Page)
    - PHP Portlet Name(1826Page)
  - Workflow
    - Category Names(1891Page)
  - MultiReport
    - Category Names(1904Page)

Character Encoding

The following character codes are available.

- Shift-JIS
- UTF-8
  Select "With BOM" if required.
- ASCII

- ISO-8859-1
- GB2312
- TIS-620

Line Feed Code

If you want to separate records, use the following line feed codes to match the OS of the computer that will be used to import the CSV file.

- Windows environment: CRLF
- Linux Environment: LF

Notations for Special Characters

The fields containing any of the following characters must be enclosed with double quotation marks (").

- Comma (,)
- LF:
  The control code for line feed. Microsoft Also used as the newline code in cells in Microsoft Excel.
- Double quotation mark (")

Note

- If you want to describe double quotation (") in any fields of CSV, you should duplicate it to be "".
  Example of how to write "xy" z in a CSV file:

```
・・・,abc,"xy""z",def,・・・
```

How to Describe Roles

To specify roles in items for configuring access permissions, specify "role" in the field.
You can specify the following roles.

- Roles built into the system (Administrators, Everyone, and LoginUser)

- Roles added by the administrator

4.4.2. Organizations/Users/Roles

This section describes the CSV file format used to import data related to organizations, users, and roles.

Organization Details

This section describes the CSV file format used to import organization information.
When a child organization recognizes a parent organization, these organizations are nested. To import nested organizations using a CSV file, describe the parent organization in a record of the child organization.

Caution

- In Garoon, only the organization information imported from CSV files will be overwritten without being appended.
  Therefore, when you import organization information from a CSV file, if an existing organization is not listed in the "Current Organization Codes" in the CSV file, that organization will be deleted.
  If you want to import organization information from a CSV file, all organization information must be listed in the CSV file.
- Operational administrators can manage organization information in a CSV file, only for organizations for which they have operational administrative privileges and organizations in the subordinate hierarchy.
  If you are an operational administrator, describe all organization information for which you have administrative privileges in the CSV file.
- Parent organizations must be written before child organizations.
- If you want to import organization data from a CSV file, you cannot specify an asterisk(*) as a parent organization code.

Note

- If you specify an asterisk (*) in a field, that field is not overwritten.
- **To add new organizations**:
  For the current organization code and the new organization Code, configure the following.

  - For the current organization code, set an asterisk (*).
  - For the new organization code, set the organization code of the organization you want to add.

- **To change existing organization information without changing the organization code of the existing organization**:
  For the current organization code and the new organization Code, configure the following.
  - For the current organization code, set the organization code of the organization registered in Garoon.
  - For the new organization code, set an asterisk(*).
- **To change an organization code of the existing organization**:
  For the current organization code and the new organization Code, configure the following.
  - For the current organization code, set the organization code of the organization you want to change.
  - For the new organization code, set the changed organization code.

CSV File Format

Current organization code, organization name, new organization code, parent organization code, notes

Example Description:

Current organization code	Organization name	New organization code	Parent organization code	Notes
Bozuman00	Bozuman Inc.	Bozuman00		Bozuman Inc.
Admin00	Administrative Division	Admin00	Bozuman00	Administrative Division
HR01	HR Department	HR01	Admin00	HR Department
Acc01	Accounting Department	Acc01	Admin00	Accounting Department
Sys01	System Department	Sys01	Admin00	System Department
Sales00	Sales Division	Sales00	Bozuman00	Sales Division
Sales01	Domestic Sales Department	Sales01	Sales00	Domestic Sales Department
Sales02	International Sales Department	Sales02	Sales00	International Sales Department

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Current Organization Code	100 characters	✔	
Organization name data	100 characters	✔	Specify a standard organization name.

Item	Number of characters	Required item	Remarks
New Organization Code	100 characters	✔	
Parent Organization Code	100 characters		When omitted, the top level organization is set.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Organization Member Data

This section describes the CSV file format used to import organization members.

Caution

- If you import a CSV file containing any organization code or login name that has not been registered in Garoon, an error occurs.
  In the CSV file you use for organization member settings, describe the organization codes or login names registered in Garoon.
- Operational administrators can manage organization member information in a CSV file, only for organizations for which they have operational administrative privileges and organizations in the subordinate hierarchy.
  In the CSV file you want to import, if you include any organization for which you do not have administrative privilege, an error occurs. Confirm whether or not you have administrative privilege for that organization.

CSV File Format

```
Organization code, login name 1, login name 2, login name 3,...
```

Example Description:

Organization code	Login name1	Login name2	Login name3	...	
Bozuman00					
Admin00	JohnJones				
HR01	MargaretThompson	RichardWhite			
Acc01	SusanHarris	PatriciaWilliams	MarySmith	RobertDavis	JamesJohnson
Sys01	ElizabethMoore	MichaelWilson	JohnJones		

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Organization code	100 characters	✔	Describe the organization code of the organization for which you want to set up members.
Login Name 1 Login Name 2 Login Name 3 ...	100 characters		Describe the login name of the member.

Organization Name

This section describes the format of the CSV file used to import organization names for each language.

Caution

- Organizations described in the CSV file for organization data settings must be registered in Garoon.
- If you specify a language code but leave the organization name blank, the organization name for the specified language will be deleted.

CSV File Format

```
Organization Code, language code, organization name
```

Example Description:

Organization code	Language code	Organization name
Sales01	en	Domestic Sales Department
Sales01	zh	国内销售部
Sales02	en	International Sales Department

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Organization code	100 characters	✓	
Language code		✓	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Organization name data	100 characters		Specify organization names for each language.

User Information

This section describes the CSV file format used to import user information.

In Garoon, when you manage users using a CSV file, you can perform following actions using one file.

- Adding users
- Updating user information
- Deleting Users

Caution

- Operational administrators can manage user information in a CSV file, only for organizations for which they have operational administrative privileges and organizations in the subordinate hierarchy.
  An error occurs if the imported CSV file contains user data for users who belong to organizations for which you do not have administrative privileges. Confirm whether or not you have administrative privilege for their organizations.

Note

- If you specify an asterisk (*) in a field, that field is not overwritten.

CSV File Format

Current login name, Name, Language of the Name, English spelling, New login name, Password, Locale, Office, Display order, Status, Delete flag, Pronunciation, E-mail, Notes, Position, Contact, URL, (customized items of user information...)

Example Description:

Current login name	Name	Language of the	English spelling	New login name	Password	Locale	Office	Display order	Status	Delete flag	Pronunci ation	E-mail
DorothyMartinez	Dorothy Martinez	en		DorothyMartinez	*	Los Angeles	Los Angeles	0	1			Dorothy-Marti
MargaretThompson	Margaret Thompson	en		MargaretThompson	*	Los Angeles	Los Angeles	0	1			Margaret-Tho
SusanHarris	Susan Harris	en		SusanHarris	*	Los Angeles	Los Angeles	0	1	1		Susan-Harris
MariaJackson	Maria Jackson	en		MariaJackson	*	tokyo	tokyo	0	1			Maria-Jackso
JenniferAnderson	Jennifer Anderson	en		JenniferAnderson	*	Los Angeles	Los Angeles	0	1			Jennifer-Ande
ElizabethMoore	Elizabeth Moore	en		ElizabethMoore	*	Los Angeles	Los Angeles	0	1			Elizabeth-Mo
BarbaraMiller	Barbara Miller	en		BarbaraMiller	*	tokyo	Los Angeles	0	1			Barbara-Mille
LindaBrown	Linda Brown	en		LindaBrown	*	tokyo	Los Angeles	0	1			Linda-Brown

Note

- **To add users**:
  The "Current login name" of the user you want to add must be different from the login names of users who are already registered in Garoon. When duplicated login name is specified, it is considered as a change to the user information.

Current login name	Name	Language of the Name	English spelling	New login name	Password	Locale	Office	Display order	Status	Delete flag
BarbaraMiller	Barbara Miller	en		BarbaraMiller			Los Angeles	5	1	

- **To change user information**:
  User information can be changed for all fields. For fields that you do not want to change information, set

asterisks (*) in them.

For example, when you use Garoon for the first time, you set the default password in the password field, but from the next time, you set an asterisk (*) in it. If you do not set an asterisk (*) in it next time or later and the users have changed their passwords, they will be overwritten by the ones in the CSV file.

Current login name	Name	Language of the Name	English spelling	New login name	Password	Locale	Office	Display order	Status	Delete flag
BarbaraMiller	Barbara	en		*	*			5	1	

- **To delete users**:

  If you want to delete users who are registered in Garoon, set "1" for "Delete flags".

Current login name	Name	Language of the Name	English spelling	New login name	Password	Locale	Office	Display order	Status	Delete flag
BarbaraMiller	Barbara Miller	en		*				5	1	1

Data such as schedules and messages of users who have been deleted will be deleted automatically at the deletion time set on the "User Data deletion time" screen of the system administration.

For details, see Setting the Time to Delete User Data(88Page).

CSV File Items and Specifications

- Import Item

Item	Number of characters	Required item	Remarks
Current Login Name	100 characters	✔	You cannot specify an asterisk (*) for the current login name. It must be unique throughout Garoon.
Name	100 characters	✔	Specify a standard user name.
Language		✔	Specify this if you have specified English as a language to be used for entering user profile items(565Page) in the General settings screen for localization. Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English.

Item	Number of characters	Required item	Remarks
			• zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
English	100 characters		Specify user names in English if you have specified English as a language to be used for entering user profile items(565Page) in the General settings screen for localization.
New Login Name	100 characters	✔	
password	64 characters		If you want to prevent a CSV file from overwriting user-specified passwords when importing the CSV file, specify an asterisk (*).
Locale	100 characters		
Office	100 characters		
Display order	8 characters		Specify the user list's display priority using an integer of 0 (zero) or higher. You can specify up to eight digits.
Use/Stop			Specify one of the following values: • 0 Specify this if you want to prohibit access. • 1 Specify this if you want to allow access. If omitted, "0" is loaded to prevent user access.
Delete Flag			To delete registered users, specify "1".

Item	Number of characters	Required item	Remarks
Pronunciation	100 characters		
E-mail	100 characters		
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Job title	100 characters		
Contacts	100 characters		
URL	255 characters		

- Custom items

Item	Number of characters	Required[1]	Remarks
String (one line)	100 characters		
String (Multiple lines)	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
URL	255 characters		
Image URL	255 characters		

Item	Number of characters	Required[1]	Remarks
E-mail	100 characters		
IP Phone	100 characters		
password	64 characters		

[1]: Required if the "Required field" check box is selected in the item settings.

CSV file format for version 3.0 or earlier

Version You cannot export or import information about localization using the format in version 3.0 or earlier.

```
Current login name, name, new login name, password, display priority, use/stop, deletion flag, pronunciation, E-mail, memo, job title, Contacts, URL (, customized items of user information...)
```

Membership Information Data

This section describes the CSV file format used to import organizations where users belong.

Caution

- If you import a CSV file containing a login name or an organization code that has not been added to Garoon, an error occurs.
  In the CSV file for user's organization, describe the login name or the organization code registered in Garoon.

CSV File Format

```
Login name, organization code 1 (priority organization), organization code 2, organization code 3,...
```

Example Description:

Login name	Organization code1	Organization code2	Organization code3	...
DorothyMartinez	Sales02	HR01	Acc01	
MargaretThompson	HR01	Acc01		
SusanHarris	Acc01			
MariaJackson	Sales01			

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login name	100 characters	✔	Describe the login name of the user for whom you set up the organization.
Organization Code 1 Organization Code 2 Organization Code 3 ...	100 characters		Describe the organization code of the organization. The first organization code is the "priority organization".

Role Data by User

Describe the format of a CSV file used to import users' roles.

Caution

- If you import a CSV file containing a login name or role name that has not been added to Garoon, an error occurs.
  In the CSV file you use for roll settings, describe the login names or role names registered in Garoon.

CSV File Format

```
Login name, role name 1, role name 2, role name 3,...
```

Example Description:

Login name	Role name1	Role name2	Role name3	...
Administrator	Administrators			
JenniferAnderson	General Manager	App Administrator		
ThomasRobinson	Administrators			
JohnJones	General Manager			

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login name	100 characters	✔	Describe the login name of the user for whom you set up the role.
Role Name 1 Role Name 2 Role Name 3 ...	100 characters		Describe the role name of the role.

Role Details

This section describes the CSV file format used to import role information.

Caution

- When you add roles, you must describe role names that are not registered in Garoon. When duplicated role name is specified, it is considered as a change to the role information.
- You cannot rename or delete roles using CSV files.

CSV File Format

```
Role name, notes
```

Example Description:

Role name	Notes
General Manager	
Manager	
App Administrator	Up to 10 people

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Role name	100 characters	✓	Everyone, LoginUser, Owner, CommandLine, and Administrators cannot be used as role names.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Data by Role

Describe the format of a CSV file used to import user data by role.

Caution

- If you import a CSV file containing a role name or login name that has not been added to Garoon, an error occurs.
  In the CSV file you use for user settings, describe the login names or role names registered in Garoon.

CSV File Format

```
Role name, login name 1, login name 2, login name 3,...
```

Example Description:

Role name	Login name1	Login name2	Login name3	...
Administrators	Administrator	ThomasRobinson	Dorothy Martinez	
General Manager	JenniferAnderson	JohnJones		
Manager	Dorothy Martinez			

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Role name	100 characters	✔	Describe the name of the role for which you want to set up users.
Login Name 1 Login Name 2 Login Name 3 ...	100 characters		Describe the login name of the user.

4.4.3. Application Users

This section describes the CSV format used to import IP addresses that are specified for application users and remote access rule.

User Settings

This section explains the CSV file format for importing application users.
For information on users who use KUNAI and applications allowed to be used in KUNAI, see KUNAI(1911Page).

Caution

- If you import a CSV file containing any login name, organization code, or role name that has not been registered in Garoon, an error occurs.
  In the CSV file you use for user settings, describe the login name, organization code, or role name registered in Garoon.

- When importing from a CSV file, organizations, users, and roles that are not listed in the CSV file are removed from the user settings.
  If you want to retain organizations, users, and roles that have been registered, you must also include the organizations, users, and roles in the CSV file.

CSV File Format

Items, Targets, Space, Bookmarks, Scheduler, Messages, Bulletin Board, Cabinet, Phone Messages, Timesheet, Address Book, E-mail, Workflow, MultiReport

Example Description:

Items	Targets	Space	Bookmarks	Scheduler	Messages	Bulletin Board	Cabinet	Phone Messages
dynamic_role	Everyone	1	1	1	1	1	1	1
group	Sales01	1	1	1	1	0	0	1
user	MariaJackson	1	0	1	1	1	1	1
user	BarbaraMiller	1	1	0	1	1	1	1
user	ThomasRobinson	1	1	1	1	1	1	1

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Items		✔	Describes the target type of users. The following types can be specified. • user Specify this when you want to set users as application users. • group Specify this when you want to set organizations as application users. • dynamic_role Specify this when you want to set dynamic roles as application users. • static_role Specify this when you want to set static roles as application users.
Targets	100 characters	✔	Describe the login name, organization code, or role name of the target.

Item	Number of characters	Required item	Remarks
Space - Multireport			Specify one of the following values: • 0 Specify this if you want to prohibit applications to be used. • 1 Specify this if you want to allow applications to be used. • 2 Specify this if you want to prohibit remote access to applications. If omitted, "0" is loaded and the use of applications is prohibited.

IP Addresses to Be Used to Control Remote Access

This section explains the CSV file format for importing IP addresses to be used to control remote access.

Caution

- When importing from a CSV file, IP addresses that are not listed in the CSV file are deleted from Garoon.
  If you want to keep the IP addresses already registered in Garoon, you must also add them to the CSV file.

CSV File Format

```
IP addresses, CIDR, notes
```

Example Description:

IP address	CIDR	Memo
192.0.2.1	25	Tokyo office
192.0.2.12	25	Los Angeles
192.0.2.24	25	Osaka office

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
IP addresses	50 characters	✔	You can specify up to 500 addresses.
CIDR	Three characters		
Memo	65,536 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

4.4.4. MIME Type

This section describes the format of the CSV file used to import the MIME type in "Files" in system administration.

CSV File Format

```
Extension, MIME type
```

Example Description:

Extension	MIME type
txt	text/plain
html	text/html

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Extension	100 characters	✔	Specify the text after dot (.). If you specify an existing extension, information for that extension will be updated.
MIME Type	100 characters	✔	Specify the MIME type.

4.4.5. Calendar

This section describes the format of the CSV file used to import data related to calendars.

Events

This section describes the format of the CSV file used to import events.

Note

- If you add an event that has already been registered in Garoon to the CSV file, it will be added as a new event.
- The date of the event data in CSV file is in the form of "YYYY/MM/DD".
- By referencing the "national holidays" listed on the web page provided by the Cabinet Office, we have created a CSV file. This file is available only in Japanese. You can download and use the file (garoon_holidayYYYY.csv) for the year you need from the page describing How do I set up holidays in Japan?.

CSV File Format

```
Date, event type, event details
```

Example Description:

Date	Type	Event details
2019/8/12	1	Substitute holiday
2019/8/17	5	Company event
2019/8/21	3	User Meeting

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Date		✓	Use YYYY-MM-DD format or YYYY/MM/DD format.
Event Type		✓	Specify one of the following values: • 1 Specify this if you register an event as a national holiday. • 3 Specify this if you register an event as a note. • 5 Specify this if you register an event as a working day. If you specify any value other than "1", "3", or "5", an error occurs when importing a CSV file.
Event Details	65,535 characters	✓	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Office Information

This section describes the CSV file format used to import office information.

CSV File Format

```
Office name, Office code, Workday: Sun, Workday: Mon, Workday: Tue, Workday: Wed, Workday: Thu,
Workday: Fri, Workday: Sat, Calendar Workday, Calendar Code, Uptime 1: Start time, Uptime 1: End time,
Uptime 2: Start time, Uptime 2: End time,...
```

Example Description:

Office name	Office code	Office day: Sun	Office day: Mon	Office day: Tue	Office day: Wed	Office day: Thu	Office day: Fri	Office day: Sat	Workdays in calendar	Calendar code	Time range 1: Start time	Time range 1: End time	Time range 2: Start time	Time range 2: End time
Los Angeles	Los Angeles	0	1	1	1	1	1	0	1	default	9:00:00	12:00:00	13:00:00	18:00:00
Tokyo	tokyo	0	1	1	1	1	1	0	1	JP	9:00:00	12:00:00	13:00:00	18:00:00

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Office Name	100 characters	✔	Specify a standard office name.
Office Code	100 characters	✔	
Workday: Sun Workday: Mon Workday: Tue Workday: Wed Workday: Thu Workday: Fri Workday: Sat			Specify one of the following values: • 0 Specify this if you add a date as a nonworking day. • 1 Specify this if you add a date as a working day. If omitted, data will be imported as "0: Nonworking day".
Calendar Workday			Specify one of the following values: • 0 Specify this if you do not want to apply. • 1 Specify this if you want to apply. If omitted, data will be imported as "0: Do not apply".
Calendar Code	100 characters	✔	Specify the calendar code of the calendar used in the office. If you want to use a standard calendar, specify "default".
Uptime 1: Start time Uptime 1: End time Uptime 2: Start time Uptime 2: End time ...	100 characters	✔	Specify the start and end times of working hours. Specify the hour (HH), minutes (mm), and seconds (ss) in the hh:mm:ss format.

Office Name

This section describes the CSV file format used to import office names for each language.

Caution

- If an office code of an office that has not been registered in Garoon is set, office name will not be imported for each language.
- Importing a CSV file does not delete existing office names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Office name" field blank results in the office name for that language being deleted.

CSV File Format

Office code, language code, office name

Example Description:

Office code	Language code	Office name
LosAngeles	en	Los Angeles
tokyo	ja	東京

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Office Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified).

Item	Number of characters	Required item	Remarks
			• zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Office Name	100 characters		Specify the office name for each language.

4.4.6. Portal

This section describes the format of CSV files used to import HTML portlet names and PHP portlet names.

HTML Portlet Name

This section describes the CSV file format for importing HTML portlet name for each language.

Caution

- Importing a CSV file does not delete existing HTML portlet names (for each language) that are not included in the CSV file.
  However, even if you specify language code, leaving the "HTML Portlet Name" field blank results in the HTML portlet name for that language being deleted.

CSV File Format

```
HTML portlet ID, language code, HTML portlet name
```

Example Description:

HTML portlet ID	Language code	HTML portlet name
40	zh	常问问题
40	en	Frequently Asked Questions
40	ja	社内手続きFAQ
41	en	Team schedule
47	en	Products

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
HTML Portlet ID	100 characters	✓	HTML portlet ID is an ID that Garoon automatically configures. You check this ID by exporting HTML portlet name to a CSV file.
Language code		✓	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
HTML Portlet Name	100 characters		Specify the name of the HTML portlet for each language.

PHP Portlet Name

This section describes the CSV file format for importing PHP portlet name for each language.

Caution

- Importing a CSV file does not delete existing PHP portlet names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", if you leave the "PHP Portlet Name" field blank, the PHP portlet name for that language will be deleted.

CSV File Format

PHP portlet ID, language code, PHP portlet name

Example Description:

PHP portlet ID	Language code	PHP portlet name
38	ja	販売実績
38	en	Sales Results
39	en	Requested tasks
39	zh	业务委托

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
PHP Portlet ID	100 characters	✔	PHP portlet ID is an ID that Garoon automatically configures. You check this ID by exporting PHP portlet name to a CSV file.
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional).

Item	Number of characters	Required item	Remarks
			This is used for Chinese characters displayed in Traditional Chinese.
PHP portlet name	100 characters		Specify the name of the PHP portlet for each language.

4.4.7. Space

This section describes the format of the CSV file used to import data related to space categories.

Categories

This section describes the CSV file format used to import categories.

Note

- If you add an category code that has already been registered in Garoon to the CSV file, category information will be updated.

CSV File Format

```
Parent category code, category code, category name, memo
```

Example Description:

Parent category code	Category code	Category name	Notes
	default_space_category	General	
	Administrative	Administrative Division	
Administrative	Systems	Systems Department	
Administrative	HR	HR Department	
Administrative	Accounting	Accounting Department	

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Parent Category Code	100 characters		If omitted, category is placed in the root.
Category Code	100 characters	✔	
Category Names	100 characters	✔	Specify a standard category name.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Category Names

This section describes the CSV file format used to import display names of categories.

Caution

- If a category code of a category that has not been registered in Garoon is set, category names will not be imported for each language.
- Importing a CSV file does not delete existing category names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Category Name" field blank results in the category name for that language being deleted.

CSV File Format

Category code, language code, category name

Example Description:

Category code	Language code	Category name
default_space_category	ja	全般
default_space_category	en	General
default_space_category	zh	一般
default_space_category	zh-tw	一般
Domestic Sales	ja	国内営業部
Domestic Sales	en	Domestic Sales
Domestic Sales	zh	国内销售部

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.

Item	Number of characters	Required item	Remarks
Category names	100 characters		Specify category names for each language.

4.4.8. Bookmarks

This section describes the CSV file format used to import data related to bookmarks.

Shared Links and Dividers

This section describes the format of a CSV file used to import shared links and separator lines.

CSV File Format

```
Title, URL, notes, type to add
```

Example Description:

Title	URL	Memo	Type to add
Cybozu, Inc. homepage	https://www.example.com	Corporate site	link
Bozuman Corporation homepage	https://www.example.com		link
			line

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Subject	100 characters	✔	This is required if you have entered "link" in the type to add field.
URL	255 characters	✔	This is required if you have entered "link" in the type to add field.

Item	Number of characters	Required item	Remarks
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Type to add			Specify one of the following values: • link Add a shared link. • line Add a separator line. If omitted, "link" is imported.

User Rights

This section describes the CSV file format used to import access permissions.
Access permissions are set for categories. For each category for which you want to set access permissions, describe the lines to set security model and the lines to set access permissions.

Note

- When you import access permissions data, an error occurs if the target described in the CSV file has not been added to Garoon.
- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:
  Describe the security model for the category. The format is as follows.

```
Category code, setting items, settings
```

- Lines for setting access permissions:
  Describe access permissions to be set in separate lines for each target. The format is as follows.

Category code, setting items, settings, target

Example Description:

	Category code	Items	Values	Targets	
	ROOT_CATEGORY	security_model	revoke		
a)	Sales Headquarter	security_model	grant		c)
a)	Sales Headquarter	user	B	Barbara Miller	d)
a)	Sales Headquarter	group	B	Domestics Sales	d)
b)	Planning Division	security_model	revoke		c)
b)	Planning Division	static_role	B	Accounting Department	d)

a): 1st data

b): 2nd data

c): Lines for setting up the security model

d): Lines for setting access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	Specify "security_model".
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	Specify the same category code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles. • static_role Specify this if you set access permissions for static roles.
Available Values			This item describes the actions allowed for "target". • When you specified the security model "grant" to select targets: Specify "B". • If you specified the security model "revoke" to select targets to be restricted: Leave the field empty. Nothing is displayed in the access permissions list. If a user, organization, or role you specified as a target already has access permissions, the registered information will be deleted and view privilege will be granted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user.

Item	Number of characters	Required item	Remarks
			• Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

4.4.9. Scheduler

This section describes the CSV file format used to import scheduler data.

Caution

- Even if you specify AM/PM for the start time and end time in the CSV file, "AM" and "PM" are ignored while loading the file. Time must be specified in 24-hour time format.
  Example:
  "05:00:00 PM" is loaded as "05:00:00".
  Use "17:00:00" instead to specify "05:00:00 PM".

Appointment

CSV file format varies depending on whether you import an appointment from the system administration screen or from the personal settings on the user screen.

Caution

- Importing a CSV file does not delete the appointment data that are not registered in Garoon.
  However, the existing appointment data cannot be updated by importing a CSV file. All appointment data

described in the CSV file will be added to Garoon as new appointments.
For example, if you specify an already registered appointment in a CSV file and import that file, that appointment is duplicated in Garoon.

Appointments in System Administration

This section describes the format of the CSV file used to import appointments in "Scheduler" in system administration.

CSV File Format

Start date, start time, end date, end time, appointment, appointment details, memo, attendees/organizations/facilities, creator(, custom items for facility reservation information)

Example Description:

Start date	Start time	End date	End time	Appointmen	Appointment details	Notes	Attendees/Organizations/Facilities	Creator
2019/9/5		2019/9/5		Other	English Test		BarbaraMiller	BarbaraMiller
2019/9/5		2019/9/5		Holiday	Charles		BarbaraMiller	BarbaraMiller
2019/9/3	17:00:00	2019/9/3	18:00:00	Meeting	Business strategy meeting		BarbaraMiller	BarbaraMiller
2019/9/4	14:00:00	2019/9/4	15:00:00	Meeting	Follow-up on groupware implementation	It has been a month	BarbaraMiller	BarbaraMiller
2019/9/5	9:30:00	2019/9/5	10:30:00	Meeting	morning assembly		BarbaraMiller	BarbaraMiller
2019/9/5	9:40:00	2019/9/5	12:30:00	OOF	Garoon seminar		BarbaraMiller	BarbaraMiller

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Start date		✔	Use YYYY-MM-DD format or YYYY/MM/DD format.
Start time			Specify the value in HH:MM:SS format.
End date		✔	Use YYYY-MM-DD format or YYYY/MM/DD format.
End time			Specify the value in HH:MM:SS format.
Appointment	100 characters		Specify the title of the appointment (Appointment type).
Appointment details	100 characters		Describe the details of the appointment title.

Item	Number of characters	Required item	Remarks
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Attendees, organization, or facility	100 characters	✓	Describe the login name, organization code, or facility code of the target. If a login name, organization code, or facility code is duplicated, target is added in order of following priority. 1. Login Name 2. Organization Code 3. Facility Code
Created by		✓	
Custom items for facility reservation information			

Appointments in Personal Settings

This section describes the format of the CSV file used to import appointments in "Scheduler" in personal settings.

CSV File Format

```
Start date, start time, end date, end time, appointment, appointment details, memo
```

Example Description:

Start date	Start time	End date	End time	Appointment	Appointment details	Notes
2019/9/5		2019/9/5		Other	English Test	
2019/9/5		2019/9/5		Holiday	Charles	
2019/9/3	17:00:00	2019/9/3	18:00:00	Meeting	Business strategy meeting	
2019/9/4	14:00:00	2019/9/4	15:00:00	Meeting	Follow-up on groupware implementation	It has been a month since Garoon was implemented. We would like you to give us your feedback to improve its productivity and usability. Your cooperation will be highly appreciated.
2019/9/5	9:30:00	2019/9/5	10:30:00	Meeting	morning assembly	

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Start date		✔	Use YYYY-MM-DD format or YYYY/MM/DD format.
Start time			Specify the value in HH:MM:SS format.
End date		✔	Use YYYY-MM-DD format or YYYY/MM/DD format.
End time			Specify the value in HH:MM:SS format.
Appointment	100 characters		Specify the title of the appointment (Appointment type).
Appointment details	100 characters		Describe the details of the appointment title.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Facility Information

This section describes the CSV file format used to import facility information.

Note

- Importing a CSV file does not delete existing facility information that is not included in the CSV file.
- If you want to change existing facility information:
  In the Facility Code, specify a facility code of a facility that is registered in Garoon.
- If you want to set up a facility group:
  In the Facility Group Code, specify a facility group code of a facility group registered in Garoon.

CSV File Format

```
Facility name, facility code, facility group code, memo
```

Example Description:

Facility name	Facility code	Facility group code	Notes
Meeting room 1	Meeting room 1	the second floor	maximum number:3
Meeting room 2	Meeting room 2		
Seminar room	Seminar room	the second floor	
conference room	conference_room	the second floor	under construction

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Facility Name	100 characters	✔	Specify a standard facility name.
Facility Code	100 characters	✔	
Facility Group Code	100 characters		If you import a file without facility group code specified, facility group will not be set, and the group will be imported as unassigned facility group.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Facility Name

This section describes the CSV file format used to import facility names for each language.

Caution

- If a facility code of a facility that has not been registered in Garoon is set, facility names will not be imported for each language.
- Importing a CSV file does not delete existing facility names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Facility name" field blank results in the facility name for that language being deleted.

CSV File Format

```
Facility Code, language code, facility name
```

Example Description:

Facility code	Language code	Facility name
Meeting room 1	en	Meeting room 1
Meeting room 1	ja	第1会議室
Meeting room 1	zh	第1会议室
Video conferencing s	zh	TV会议系统

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Facility Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Facility Name	100 characters		Specify facility names for each language.

Facility Group Information

This section describes the CSV file format used to import facility groups.

Note

- Importing a CSV file does not delete existing facility groups that are not included in the CSV file.
  - **If you want to add a new facility group:**
    For the current facility group code and the new facility group code, configure the following.
    - Set an asterisk "*" for the current facility group code.
    - For the new facility group code, set the facility group code of the facility group to be added.
  - **If you want to change the information on an existing facility group without changing the facility group code:**
    For the current facility group code and the new facility group code, configure the following.
    - For the current facility group code, specify the facility group code of the facility group registered in Garoon.
    - For the new facility group code, set an asterisk "*".
  - **If you want to change the facility group code for an existing facility group:**
    For the current facility group code and the new facility group code, configure the following.
    - For the current facility group code, set the facility group code of the facility group to be changed.
    - For the new facility group code, set the changed facility group code.

CSV File Format

Parent facility group code, current facility group code, facility group name, notes, new facility group code

Example Description:

Parent facility group code	Current facility group code	Facility group name	Notes	New facility group code
	the first floor	the first floor		the first floor
the first floor	Video conferencing system_code	Video conferencing system	An application is required.	Video conferencing system_code
	the second floor	the second floor		the second floor
the second floor	*	Systems Daprtment		Systems Daprtment
the second floor	Domestic Sales_code	Domestic Sales		*
	Reception room	Reception room		Reception room

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Parent Facility Group Code	100 characters		If omitted, the group is placed in the top.
Current Facility Group Code	100 characters	✔	
Facility Group Name	100 characters	✔	Specify a standard facility group name.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
New Facility Group Code		✔	

Facility Group Name

This section describes the CSV file format used to import facility group names for each language.

Caution

- If a facility group code of a facility group that has not been registered in Garoon is set, facility group names will not be imported for each language.
- Importing a CSV file does not delete existing facility group names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Facility Group Name" field blank results in the facility group name for that language being deleted.

CSV File Format

```
Facility Group code, language Code, facility group name
```

Example Description:

Facility group code	Language	Facility group name
floor01	en	the first floor
floor01	ja	1階
floor01	zh	一楼
floor02	en	the second floor

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Facility Group Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Facility Group Name	100 characters		Specify facility group names for each language.

Operational Administrative Privileges for Facility Groups

This section describes the CSV file format used to import operational administrative privileges for facility groups.

Note

- When you import the data of operational administrative privileges, an error occurs if the target described in the CSV file has not been added to Garoon.

- Data that is written in the CSV file is added to the operational administrative privileges.
  Existing settings for the operational administrative privileges are retained.

CSV File Format

```
Facility group code, Items, Targets
```

Example Description:

Facility group code	Items	Targets
Web	group	Sys01
Seminar	role	Manager
Floor01	user	JohnJones
Floor01	user	MariaJackson
Floor01	group	Sales01

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Facility Group Code	100 characters	✔	
Items		✔	This item specifies the type of target for which you want to grant operational administrative privileges. The following types can be specified. • user Specify this if you grant operational administrative privileges to users. • group Specify this if you grant operational administrative privileges to organizations. • dynamic_role Specify this if you grant operational administrative privileges to dynamic roles. • role Specify this if you grant operational administrative privileges to static roles.

Item	Number of characters	Required item	Remarks
Targets	100 characters		Depending on the type you specified, describe a code. The following codes can be described. • Login name When you specify a "user" as "Items", describe the login name of that user. • Organization code When you specify a "group" as "Items", describe the organization code of that organization. • Role name When you specify a "dynamic_role" or "dynamic_role" as "Items", describe the role name of that role.

User Rights

This section describes the CSV file format used to import access permissions.
Access permissions are set for target codes. For each target code for which you want to set access permissions, describe the lines to set security model and the lines to set access permissions.

Note

- When you import access permissions data, an error occurs if the target described in the CSV file has not been added to Garoon.
- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:
  Set the security model for the target code. The format is as follows.
  ```
  Target type, target code, setting items, settings
  ```
- Lines for setting access permissions:
  Describe access permissions to be set in separate lines for each target. The format is as follows.

```
Target type, target code, setting items, settings, target
```

Example Description:

	Target type	Target code	Items	Values	Targets	
a)	user	BarbaraMiller	security_model	grant		c)
a)	user	BarbaraMiller	user	RAM	MarySmith	d)
a)	user	BarbaraMiller	user	RA	ThomasRobinson	d)
b)	facility	Meeting room 1	security_model	revoke		c)
b)	facility	Meeting room 1	user	RA	MargaretThompson	d)

a): 1st data

b): 2nd data

c): Lines for setting up the security model

d): Lines for setting access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Target type	100 characters	✓	Describes the target type of access permissions. The following types can be specified. • user Specify this if you set access permissions for a user. • group Specify this if you set access permissions for an organization. • role Specify this if you set access permissions for a role. • facility Specify this if you set access permissions for a facility. • facilitygroup Specify this if you set access permissions for a facility group.
Target Code	100 characters	✓	Depending on the type you specified, describe a code. The following codes can be described.

Item	Number of characters	Required item	Remarks
			• Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "role", describe the role name of that role. • Facility Code If you specified "facility", describe the facility code of that facility. • Facility Group Code If you specified "facilitygroup", describe the facility group code of that facility group.
Items		✔	Specify "security_model".
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Target type	100 characters	✔	Specify the same target type as the one you specified in the line where you set the security model.
Target Code	100 characters	✔	Specify the same target code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles. • role Specify this if you set access permissions for a role.
Available Values			This item describes the actions allowed for "target". If you want to set multiple permissions, specify both values (e.g. "RA"). The following characters can be used. • R Specify this if you want to grant view privilege. • A Specify this if you want to grant the permission to add. If you want to grant the permission to add, you must also grant view privilege. • M Specify this if you want to grant the permission to modify.

Item	Number of characters	Required item	Remarks
			If you want to grant the permission to modify, you must also grant view privilege. • D Specify this if you want to grant the permission to delete. If you want to grant the permission to delete, you must also grant view privilege. To restrict all actions, leave the value empty. • If you specified the security model "revoke" to select targets to be restricted: On the "User Rights List" screen, "x" is displayed in all permission fields. Users cannot perform any action because they do not have any permission. • When you specified the security model "grant" to select targets: Nothing is displayed on the "User Rights List" screen. Users cannot perform any action because permission target has not been set. When a user, organization, or role you specified had already been registered, if you import the CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✓	Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "role", describe the role name of that role.

Default "Shared with"

This section describes the CSV file format used to import default "Shared with" users.

Update Information

- November 2021:
    - In Garoon version 5.9.0 and later, "Watchers" is renamed to "Shared with" in Scheduler.

Caution

- Importing a CSV file does not delete existing default "Shared with" users that are not included in the CSV file. However if you import a CSV file without specifying an item code, the data in that line will be deleted.
- If duplicated lines with the same login name and item type exist, the last line will be applied.
- If you want to specify multiple organizations, users, or roles for the same item type, add more item code columns and describe the item code in one line.

CSV File Format

```
Login name, item type, item code 1, Item code 2, item code 3,...
```

Example Description:

Login name	Item type	Item code 1	Item code 2	Item code 3	...
BarbaraMiller	user	BarbaraMiller	LindaBrown	ThomasRobinson	DavidThomas
BarbaraMiller	group	Sales01			
RichardWhite	role	Manager			

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login name	100 characters	✔	Specify the login name who uses the default "Shared with" users.
Type		✔	This item specifies the item type to be set as the default "Shared with" users. The following item types can be specified. • user Specify this if you set users for default "Shared with" users. • group Specify this if you set organizations for default "Shared with" users. • role Specify this if you set roles for default "Shared with" users.
Item code	100 characters		Depending on the item type, describe a code. The following codes can be described. • Login name If you specified "user" for item types, describe the login name of that user. • Organization code If you specified "group" for item types, describe the organization code of that organization. • Role name If you specified "role" for item types, describe the role name of that role.

4.4.10. Bulletin Board

This section describes the CSV file format used to import data related to bulletin boards.

Categories

This section describes the CSV file format used to import categories.

Note

- If you want to update existing category information, specify a category code of a category registered in Garoon as the "category code".

CSV File Format

Parent category code, category code, category name, memo

Example Description:

Parent category code	Category code	Category name	Notes
	ROOT_CATEGORY	Root	
ROOT_CATEGORY	Ad_CATEGORY	Administrative Division	
Sys_CATEGORY	Hr_CATEGORY	HR Department	This is a bulletin board from th
Sys_CATEGORY	Account_CATEGORY	Accounting Department	
Sys_CATEGORY	Sys_CATEGORY	Systems Department	
Sys_CATEGORY	seminer	Seminer	

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Parent Category Code	100 characters	✔	For the category to be placed in the root, specify "ROOT_CATEGORY".
Category Code	100 characters	✔	
Category Names	100 characters	✔	Specify a standard category name.

Item	Number of characters	Required item	Remarks
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Category Names

This section describes the CSV file format used to import category names for each language.

Caution

- If a category code of a category that has not been registered in Garoon is set, category names will not be imported for each language.
- Importing a CSV file does not delete existing category names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Category Name" field blank results in the category name for that language being deleted.

CSV File Format

Category code, language code, category name

Example Description:

Category code	Language code	Category name
Seminar_CATEGORY	en	Seminar
Sales01_CATEGORY	zh	国内销售部
Sales01_CATEGORY	ja	国内営業部

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh (Simplified Chinese) Language code for Chinese (Simplified). • zh-tw (Traditional Chinese) This is used for Chinese characters displayed in Traditional Chinese.
Category names	100 characters		Specify category names for each language.

User Rights

This section describes the CSV file format used to import access permissions.
Access permissions are set for categories. For each category for which you want to set access permissions, describe the lines to set security model and the lines to set access permissions.

Note

- When you import access permissions data, an error occurs if the target described in the CSV file has not been added to Garoon.
- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:
  Describe the security model for the category. The format is as follows.

```
Category code, setting items, settings
```

- Lines for setting access permissions:

  Describe access permissions to be set in separate lines for each target. The format is as follows.

```
Category code, setting items, settings, target
```

Example Description:

	Category code	Items	Values	Targets	
a)	ROOT_CATEGORY	security_model	grant		c)
	ROOT_CATEGORY	dynamic_role	R	LoginUser	d)
b)	Sales	security_model	revoke		c)
	Sales	user	RW	BarbaraMiller	d)
	Sales	group	R	Sales01	

a): 1st data

b): 2nd data

c): Lines for setting up the security model

D): Lines for setting up the access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	Specify "security_model".
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	Specify the same category code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles. • static_role Specify this if you set access permissions for static roles.
Available Values			This item describes the actions allowed for "target". If you want to set multiple permissions, specify both values (e.g. "RW"). The following characters can be used. • R Specify this if you want to grant view privilege. • W Specify this if you want to grant the permission to write. If you want to grant the permission to write, you must also grant view privilege. • F Specify this if you want to grant the permission to write comments. If you want to grant the permission to write comments, you must also grant view privilege. To restrict all actions, leave the value empty.

Item	Number of characters	Required item	Remarks
			• If you specified the security model "revoke" to select targets to be restricted: On the "User Rights List" screen, "x" is displayed in all permission fields. Users cannot perform any action because they do not have any permission. • When you specified the security model "grant" to select targets: Nothing is displayed on the "User Rights List" screen. Users cannot perform any action because permission target has not been set. When a user, organization, or role you specified had already been registered, if you import the CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

Operational Administrative Privileges

This section describes the CSV file format used to import operational administrative privileges.

Grant operational administrative privileges for each category.

Note

- When you import the data of operational administrative privileges, an error occurs if the target described in the CSV file has not been added to Garoon.
- Data that is written in the CSV file is added to the operational administrative privileges.
  Existing settings for the operational administrative privileges are retained.

CSV File Format

Category code, setting items, target

Example Description:

Category code	Items	Targets
ROOT_CATEGORY	group	Sys01
Sales00_category	role	Manager
Sales01_category	user	JohnJones
Sales01_category	user	MariaJackson
Sales01_category	group	Sales01

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	This item specifies the type of target for which you want to grant operational administrative privileges. The following types can be specified. • user Specify this if you grant operational administrative privileges to users. • group Specify this if you grant operational administrative privileges to organizations. • dynamic_role Specify this if you grant operational administrative privileges to dynamic roles.

Item	Number of characters	Required item	Remarks
			• role Specify this if you grant operational administrative privileges to static roles.
Targets	100 characters		Depending on the type you specified, describe a code. The following codes can be described. • Login name When you specify a "user" as "Items", describe the login name of that user. • Organization code When you specify a "group" as "Items", describe the organization code of that organization. • Role name When you specify a "dynamic_role" or "dynamic_role" as "Items", describe the role name of that role.

Notification Settings

This section describes the CSV file format used to import notification settings of categories.

CSV File Format

Category code, setting items, settings, target

Example Description:

Category code	Items	Values	Targets
Sys_CATEGORY	force_notify	1	
Sys_CATEGORY	dynamic_role	1	Everyone
Domestic_CATEGORY	group	1	Sales01
Domestic_CATEGORY	user	1	MariaJackson
Domestic_CATEGORY	user	1	BarbaraMiller
Domestic_CATEGORY	user	0	LindaBrown

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	This item specifies the type of target for which you want to set notifications. The following types can be specified. • force_notify Specify this if you set forced notifications. • user Specify this if you set notifications for users. • group Specify this if you set notifications for organizations. • dynamic_role Specify this if you set notifications for dynamic roles. • role Specify this if you set notifications for static roles.
Available Values		✔	Depending on the type you specified, describe a code. The following codes can be described. • If you specified "force_notify": ◦ 0 Specify this if you deselect forced notifications. ◦ 1 Specify this if you set forced notifications. • If you specified any item other than "force_notify": ◦ 0 Specify this if you deselect notifications. ◦ 1 Specify this if you set notifications.
Targets	100 characters		Depending on the type you specified, describe a code. The following codes can be described.

Item	Number of characters	Required item	Remarks
			• Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "role", describe the role name of that role. If you specified "force_notify", leave this item empty.

4.4.11. Cabinet

This section describes the CSV file format used to import data related to cabinets.

Folder

This section describes the CSV file format used to import folders.

Note

- If you want to update existing folder information, specify a folder code of a folder registered in Garoon as the "folder code".

CSV File Format

```
Parent folder code, folder code, folder name, memo
```

Example Description:

Parent folder code	Folder code	Folder	Memo
	ROOT_FOLDER	Root	
ROOT_FOLDER	Sales_folder	Sales Division	
Sales_folder	Domesticsales_folder	Domestics Sales	Folder for Domestics Sales
Domesticsales_folder	Semina_folder	Seminar materials	

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Parent folder code	100 characters	✔	
Folder code	100 characters	✔	
Folder Names	100 characters	✔	Specify a standard folder name.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Folder Names

This section describes the CSV file format used to import folder names.

Caution

- If a folder code of a folder that has not been registered in Garoon is set, folder names will not be imported for each language.
- Importing a CSV file does not delete existing folder names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Folder Name" field blank results in the folder name for that language being deleted.

CSV File Format

```
Folder code, language code, folder name
```

Example Description:

Folder code	Language code	Folder
Sales_folder	en	International Sales
Seminar_folder	en	Seminar
Seminar_folder	ja	セミナー資料
Seminar_folder	zh	研讨会

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Folder code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Folder names	100 characters		Specify folder names for each language.

User Rights

This section describes the CSV file format used to import access permissions.

Access permissions are set for folders. For each folder for which you want to set access permissions, describe the lines to set security model and the lines to set access permissions.

Note

- When you import access permissions data, an error occurs if the target described in the CSV file has not been added to Garoon.
- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:

  Describe the security model for the folder. The format is as follows.

  ```
  Folder code, setting items, settings
  ```

- Lines for setting access permissions:

  Describe access permissions to be set in separate lines for each target. The format is as follows.

  ```
  Folder code, setting items, settings, target
  ```

Example Description:

	Folder code	Items	Values	Targets	
a)	ROOT_FOLDER	security_model	grant		c)
	ROOT_FOLDER	dynamic_role	RW	LoginUser	d)
b)	Sales	security_model	grant		c)
	Sales	user	R	BarbaraMiller	d)
	Sales	group	RW	Sales01	

a): 1st data

b): 2nd data

c): Lines for setting up the security model

D): Lines for setting up the access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Folder code	100 characters	✔	
Items		✔	Specify "security_model".

Item	Number of characters	Required item	Remarks
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Folder code	100 characters	✔	Specify the same category code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles. • static_role Specify this if you set access permissions for static roles.
Available Values			This item describes the actions allowed for "target". If you want to set multiple permissions, specify both

Item	Number of characters	Required item	Remarks
			values (e.g. "RW"). The following characters can be used. • R Specify this if you want to grant view privilege. • W Specify this if you want to grant the permission to write. If you want to grant the permission to write, you must also grant view privilege. To restrict all actions, leave the value empty. • If you specified the security model "revoke" to select targets to be restricted: On the "User Rights List" screen, "x" is displayed in all permission fields. Users cannot perform any action because they do not have any permission. • When you specified the security model "grant" to select targets: Nothing is displayed on the "User Rights List" screen. Users cannot perform any action because permission target has not been set. When a user, organization, or role you specified had already been registered, if you import the CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization.

Item	Number of characters	Required item	Remarks
			• Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

Operational Administrative Privileges

This section describes the CSV file format used to import operational administrative privileges.
You can grant operational administrative privileges for each folder.

Note

- When you import the data of operational administrative privileges, an error occurs if the target described in the CSV file has not been added to Garoon.
- Data that is written in the CSV file is added to the operational administrative privileges.
  Existing settings for the operational administrative privileges are retained.

CSV File Format

```
Folder code, Items, Targets
```

Example Description:

Folder code	Items	Targets
ROOT_FOLDER	group	Sys01
Sales00_folder	role	Manager
Sales01_folder	user	JohnJones
Sales01_folder	user	MariaJackson
Sales01_folder	group	Sales01

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Folder code	100 characters	✔	
Items		✔	This item specifies the type of target for which you want to grant operational administrative privileges. The following types can be specified. • user Specify this if you grant operational administrative privileges to users. • group Specify this if you grant operational administrative privileges to organizations. • dynamic_role Specify this if you grant operational administrative privileges to dynamic roles. • role Specify this if you grant operational administrative privileges to static roles.
Targets	100 characters		Depending on the type you specified, describe a code. The following codes can be described. • Login name When you specify a "user" as "Items", describe the login name of that user. • Organization code When you specify a "group" as "Items", describe the organization code of that organization. • Role name When you specify a "dynamic_role" or "dynamic_role" as "Items", describe the role name of that role.

Notification Settings

This section describes the CSV file format used to import notification settings of folders.

CSV File Format

```
Folder code, setting items, settings, target
```

Example Description:

Folder code	Items	Values	Targets
Sales01_folder	group	1	Sales01
Sales01_folder	user	0	MariaJackson
Sales01_folder	user	1	BarbaraMiller
Sales01_folder	dynamic_role	1	HRDepartment

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Folder code	100 characters	✔	
Items		✔	This item specifies the type of target for which you want to set notifications. The following types can be specified. • user Specify this if you set notifications for users. • group Specify this if you set notifications for organizations. • dynamic_role Specify this if you set notifications for dynamic roles. • role Specify this if you set notifications for static roles.
Available Values		✔	Specify one of the following values: • 0 Specify this if you deselect notifications. • 1 Specify this if you set notifications.

Item	Number of characters	Required item	Remarks
			Entering any value other than "0" or "1" causes an error when the CSV file is imported.
Targets	100 characters		Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "role", describe the role name of that role.

4.4.12. Phone Messages

This section describes the format of a CSV file used to import access permissions for phone messages.
Access permissions are set for target codes. For each target code, describe the lines to set security model and the lines to set access permissions.

Note

- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:
  Set the security model for the target code. The format is as follows.

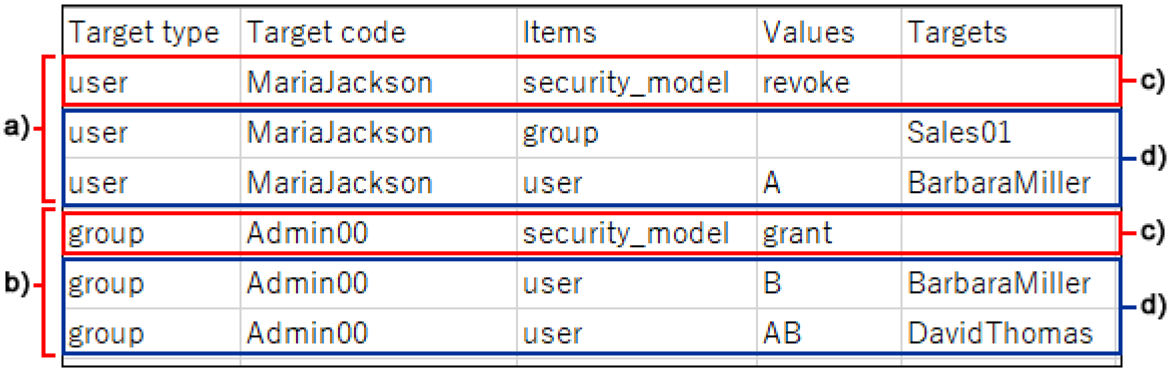
```
Target type, target code, setting items, settings
```

- Lines for setting access permissions:

  Describe access permissions to be set in separate lines for each target. The format is as follows.

```
Target type, target code, setting items, settings, target
```

Example Description:



Target type	Target code	Items	Values	Targets
user	MariaJackson	security_model	revoke	
user	MariaJackson	group		Sales01
user	MariaJackson	user	A	BarbaraMiller
group	Admin00	security_model	grant	
group	Admin00	user	B	BarbaraMiller
group	Admin00	user	AB	DavidThomas

a): 1st data

b): 2nd data

c): Lines for setting up the security model

D): Lines for setting up the access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Target type	100 characters	✓	Describes the target type of access permissions. The following types can be specified. • user Specify this if you set access permissions for a user. • group Specify this if you set access permissions for an organization. • role Specify this if you set access permissions for a role.
Target Code	100 characters	✓	Depending on the type you specified, describe a code. The following codes can be described.

Item	Number of characters	Required item	Remarks
			• Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "role", describe the role name of that role.
Items		✓	Specify "security_model".
Available Values		✓	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Target type	100 characters	✓	Specify the same target type as the one you specified in the line where you set the security model.
Target Code	100 characters	✓	Specify the same target code as the one you specified in the line where you set the security model.
Items		✓	This item specifies the type of target for which you want to set access permissions. The following types can be specified.

<table>
<tr><th>Item</th><th>Number of characters</th><th>Required item</th><th>Remarks</th></tr>
<tr><td></td><td></td><td></td><td>user
Specify this if you set access permissions for users.
group
Specify this if you set access permissions for organizations.
dynamic_role
Specify this if you set access permissions for dynamic roles.
role
Specify this if you set access permissions for a role.</td></tr>
<tr><td>Available Values</td><td></td><td></td><td>This item describes the actions allowed for "target". If you want to set multiple permissions, specify both values (e.g. "BA"). The following characters can be used.
B
Specify this if you want to grant view privilege.
A
Specify this if you want to grant the right to register.
To restrict all actions, leave the value empty.
If you specified the security model "revoke" to select targets to be restricted:
On the "User Rights List" screen, "x" is displayed in all permission fields. Users cannot perform any action because they do not have any permission.
When you specified the security model "grant" to select targets:
Nothing is displayed on the "User Rights List" screen. Users cannot perform any action because permission target has not been set.
When a user, organization, or role you specified had already been registered, if you import the</td></tr>
</table>

Item	Number of characters	Required item	Remarks
			CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

4.4.13. Timesheet

The timesheet data can only be exported to a CSV file. You cannot import a CSV file you have edited for timesheet. This section describes the format of the timesheet exported to a CSV file.

CSV File Format

```
Login name, User name ,Date, Start time, IP address of start time, End time, IP address of end time, Out time,
IP address of out time, Back time, IP address of back time, Notes
```

CSV File Items and Specifications

Item	Number of characters	Remarks
Login name	100 characters	
User name	100 characters	
Date		
Start time		
IP address of start time		When the start time is recorded, IP address is registered from which the user has accessed.
End time		
IP address of end time		When the end time is recorded, IP address is registered from which the user has accessed.
Out time		
IP address of out time		When the out time is recorded, IP address is registered from which the user has accessed.
Back time		
IP address of back time		When the back time is recorded, IP address is registered from which the user has accessed.
Remarks	65,535 characters	

4.4.14. Address Book

This section describes the CSV file format used to import data related to address books.

Even if data other than the selected book is included in a CSV file, only the data for the selected book is imported.

Shared Address Books/Personal Address Books

This section describes the CSV file format used to import shared address books and personal address books.

Note

- Custom items described in the CSV file must be added to Garoon.
- Existing data cannot be overwritten by the data included in the CSV file.
  If any address described in the CSV file is already registered in Garoon, that address is added as a new address.

CSV File Format

Display name, last name, name, last name (pronunciation), name (pronunciation), company name, company name (pronunciation), department name, zip code, address, route, time required, fare, office phone number, office fax number, URL, job title, personal phone number, e-mail, memo (, custom items)

Example Description:

Display as	Last	First	Last (Pronunciation)	First (Pronunciation)	Company	C
Bozuman Corporation Liam Lee	Liam	Lee	Liam	Lee	Bozuman Corporation	
Cybozu, Inc. Emma Harris	Emma	Harris	Emma	Harris	Cybozu, Inc.	
Christopher Scott	Christopher	Scott	Christopher	Scott		

CSV File Items and Specifications for Built-in Items

- Import Item

Item	Number of characters	Required item	Remarks
Name	100 characters	✔	
Last Name	100 characters		
Name	100 characters		
Last Name (pronunciation)	100 characters		
Name (pronunciation)	100 characters		
Company Name	100 characters		
Company Name (pronunciation)	100 characters		
Department Name	100 characters		
Zip code	100 characters		
Address	4,096 characters		
Route	100 characters		
Time Required	100 characters		
Fare	100 characters		

Item	Number of characters	Required item	Remarks
Office Phone Number	100 characters		
Office Fax Number	100 characters		
URL	100 characters		
Job Title	100 characters		
Personal Phone Number	100 characters		
E-mail	100 characters		
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

- Custom items
  Custom items are described after the built-in item "Memo".

Item	Number of characters	Required[1]	Remarks
String (one line)	100 characters		
String (Multiple lines)	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Item	Number of characters	Required[1]	Remarks
URL	255 characters		
Image URL	255 characters		
E-mail	100 characters		
IP Phone	100 characters		
password	64 characters		

[1]: Required if the "Required field" check box is selected in the item settings.

User Rights

This section describes the CSV file format used to import access permissions.
Access permissions are set for book codes. For each book code, describe the lines to set security model and the lines to set access permissions.

Note

- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

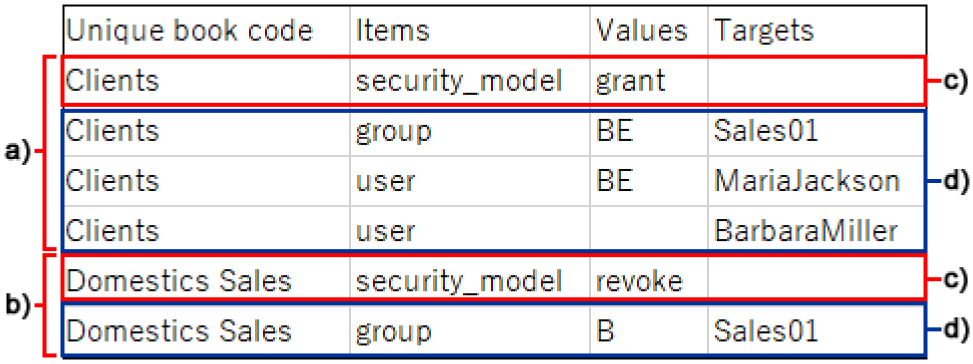
- Lines for setting the security model:
  Set the security model for the target code. The format is as follows.

  ```
  Book code, setting items, settings
  ```

- Lines for setting access permissions:
  Describe access permissions to be set in separate lines for each target. The format is as follows.

```
Book code, setting items, settings, target
```

Example Description:



Unique book code	Items	Values	Targets
Clients	security_model	grant	
Clients	group	BE	Sales01
Clients	user	BE	MariaJackson
Clients	user		BarbaraMiller
Domestics Sales	security_model	revoke	
Domestics Sales	group	B	Sales01

a): 1st data

b): 2nd data

c): Lines for setting up the security model

d): Lines for setting access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Book Code	100 characters	✔	
Items		✔	Specify "security_model".
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	Specify the same book code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles. • static_role Specify this if you set access permissions for static roles.
Available Values			This item describes the actions allowed for "target". If you want to set multiple permissions, specify both values (e.g. "BE"). The following characters can be used. • B Specify this if you want to grant view privilege. • E Specify this if you want to grant edit privilege. If you want to grant the permission to edit, you must also grant view privilege. To restrict all actions, leave the value empty. • If you specified the security model "revoke" to select targets to be restricted: On the "User Rights List" screen, "x" is displayed in all permission fields. Users cannot perform any action because they do not have any permission.

Item	Number of characters	Required item	Remarks
			• When you specified the security model "grant" to select targets: Nothing is displayed on the "User Rights List" screen. Users cannot perform any action because permission target has not been set. When a user, organization, or role you specified had already been registered, if you import the CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name If you specified "user", describe the login name of that user. • Organization code If you specified "group", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

4.4.15. E-Mail

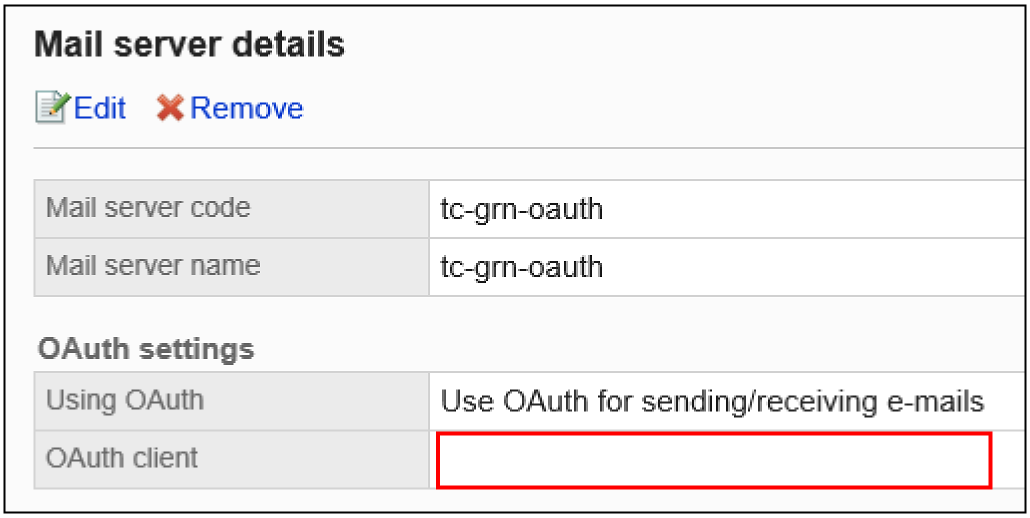
This section describes the CSV file format used to import data related to e-mails.

Mail Servers

This section describes the CSV file format used to import mail server settings.

Caution

- **When OAuth is used to send/receive e-mails in Garoon version 5.5.1 or later**
  You cannot import "OAuth client" items of e-mail servers from a CSV file. If you import the data of the existing e-mail server from a CSV file, the settings of "OAuth client" items are deleted. In this case, you need to reconfigure "OAuth client" items and users must perform the authorization.



  After resetting the "OAuth client" items of e-mail servers in Basic system administration, contact users to perform OAuth authorization in the "E-mail account details" screen in Personal Settings.

Note

- If you specify the mail server code registered in Garoon in the CSV file, information on that mail server will be changed.

CSV File Format

Mail server code, mail server name, outgoing mail server name (SMTP), outgoing mail server port number, encryption method, SMTP authentication method, setting up an account and password for sending mails, send after receiving (POP before SMTP), waiting time before sending, send time-out period, protocol for incoming e-mails, incoming mail server name, incoming mail server port number, using TLS (incoming mail server), incoming authentication method, receive time-out period

Example Description:

Mail server code	Name	Outgoing mail server name (SMTP)	Outgoing port number	Encryption method	SMTP authentication method	Set account and password for outgoing mails	Authenticate before sending e-mail (POP before SMTP)	Waiting time before sending	Time-out period for sending e-mail	Receive protocol	Incoming mail server	Incoming port number	Using TLS (Incoming e-mail server)	Incoming authentication method	Time-out period for receiving e-mail
mail-server-1	mail-server-1	smtp.example.com	587	NONE	LOGIN	0	0		10	POP3	pop.example.c	110	1	USER	10
mail-server-2	OAuth	smtp.gmail.com	587	TLS	XOAUTH2	0	0		10	POP3	pop.gmail.com	995	1	XOAUTH2	10

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Mail server code	100 characters	✔	
Mail server name	100 characters	✔	
Outgoing mail server name (SMTP)	100 characters	✔	
Outgoing port number	100 characters		Specify this with a single-byte number. If omitted, "25" is imported.
Encryption method			Specify one of the following values: • NONE This can be specified if you do not want to use the encryption method. • SSL Specify this if you want to use TLS. • TLS Specify this if you want to use STARTTLS. If omitted, "NONE" is imported.
SMTP authentication method			Specify one of the following values: • NONE Specify this if you do not want to use SMTP authentication. • PLAIN Specify this if you want to use PLAIN. • LOGIN Specify this if you want to use LOGIN.

Item	Number of characters	Required item	Remarks
			• CRAM-MD5 Specify this if you want to use CRAM-MD5. • DIGEST-MD5 Specify this if you want to use DIGEST-MD5. • XOAUTH2 Specify this if you want to use OAuth in Garoon version 5.5.1 or later. If omitted, "NONE" is imported.
Setting up an account and password for sending e-mails			Specify one of the following values: • 0 Specify this if you do not want to set up an account and password for sending e-mails. • 1 Specify this if you want to set up an account and password for sending e-mails. If omitted, "0" is imported.
Authenticate before sending e-mail (POP before SMTP)			Specify one of the following values: • 0 Specify this if you do not want to send e-mails after receiving them. • 1 Specify this if you want to send e-mails after receiving them. If omitted, "0" is imported.
Wait time before sending			Specify the value in seconds. You can set the value from 0 seconds to 10 seconds. This can be specified in increments of 1 second. "0" (Prohibited) is applied if the parameter is omitted.
Send time-out period			Specify the value in seconds. You can set the value from 10 seconds to 120 seconds. This can be specified in increments of 10 seconds. If omitted, "60" is imported.

Item	Number of characters	Required item	Remarks
Protocol for incoming e-mails			Specify one of the following values: • POP3 Specify this if you want to use POP3. • IMAP4 Specify this if you want to use IMAP4. If omitted, "POP3" is imported.
Incoming mail server	100 characters	✔	
Incoming port number	100 characters		Specify this with a single-byte number. If omitted, "110" is imported.
Using TLS (Incoming e-mail server)			Specify one of the following values: • 0 Specify this if you do not want to use TLS. • 1 Specify this if you want to use TLS. If omitted, "0" is imported.
Incoming authentication method			Specify one of the following values: • USER Specify this for the authentication using user name and password. • APOP Specify this if you want to configure APOP authentication. • XOAUTH2 Specify this if you want to use OAuth in Garoon version 5.5.1 or later. If omitted, "USER" is imported.
Receive time-out period			Specify the value in seconds. You can set the value from 10 seconds to 120 seconds. This can be specified in increments of 10 seconds. If omitted, "60" is imported.

User Accounts

This section describes the CSV file format used to import e-mail accounts.

If login names and account codes specified in the CSV file match login names and account codes of users who have been added to Garoon, you can overwrite the data in Garoon with the data in the CSV file.

Note

- If you specify an asterisk "*" in the field, that field is not overwritten.

CSV File Format

login name, account code, account name, e-mail server code, E-Mail, From name, incoming e-mail account name, incoming e-mail password, e-mail on incoming mail server, outgoing e-mail account name, outgoing e-mail password, inactive

Example Description:

Login name	Account code	Account name	Mail server code	E-Mail	From	Account name	Password	E-mail on incoming mail server	Outgoing mail account	Password for outgoing mail	Deactivate
BarbaraMiller	Barbara Miller	Barbara Miller	server-1	Babara-Miller@example.com		Barbara Miller	*	DELETE		*	0
BarbaraMiller	Miller	Miller	server-1	Miller@example.com	Barbara	Miller	*	DELETE		*	0
BarbaraMiller	Barbara.M	Barbara.M	server-2	barbara.M@example.com		Barbara.M	*	DELETE		*	0
ThomasRobinson	Thomas	Thomas	server-1	Thomas-Robinson@example.com		Thomas	*	DELETE		*	0

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login Name[1]	100 characters	✔	
Account code[1]	100 characters	✔	
Account Name[1]	100 characters		If omitted, "E-mail" is imported as the account name.

Item	Number of characters	Required item	Remarks
Mail server code[1]	100 characters	✓	
E-mail[1]	100 characters	✓	
From[1]	100 characters		
Incoming e-mail account name[1]	100 characters	✓	
Incoming e-mail password	64 characters		
E-mail on incoming mail server[1]			Specify one of the following values: • LEAVE Specify this if you want to leave e-mails in the mail server. • DELETE Specify this if you do not want to leave e-mails in the mail server. If omitted, "DELETE" is imported.
Outgoing e-mail account name[1]	100 characters		
Outgoing e-mail password	64 characters		
Deactivate[1]			Specify one of the following values: • 0 Specify this if you do not want to deactivate users. • 1 Specify this if you want to deactivate users. If omitted, "0" is imported.

[1]: You cannot specify an asterisk (*).

E-mail Quotas

This section describes the CSV file format used to import e-mail size limits.

CSV File Format

Login name, total size (MB), incoming e-mail size (KB), outgoing e-mail size (KB)

Example Description:

Login name	Maximum e-mail size (MB)	Maximum incoming mail size (KB)	Maximum outgoing mail size (KB)
BarbaraMiller	-1	1024	1024
ThomasRobinson	50	1024	512
MariaJackson	-1	102400	102400

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login name	100 characters	✔	
Total size (MB)			Specify one of the following values: • Blank, or "*" Specify this if you want to omit the total size. • -1 Specify this if you do not want to limit the total size. • Integer up to 999999 Specify the value if you want to set the total size. Integer value must be up to 999999, and the unit is MB (Mega Byte).
Incoming e-mail size (KB)			Specify one of the following values: • Blank, or "*" Specify this if you want to omit the incoming e-mail size.

Item	Number of characters	Required item	Remarks
			• -1 Specify this if you do not want to limit the incoming e-mail size. • Numeric value from 256 to 102400 Specify this if you want to set the incoming e-mail size. The unit for this numeric value (from 256 to 102400) is KB.
Outgoing e-mail size (KB)			Specify one of the following values: • Blank, or "*" Specify this if you want to omit the outgoing e-mail size. • -1 Specify this if you do not want to limit the outgoing e-mail size. • Numeric value from 256 to 30720 Specify this if you want to set the outgoing e-mail size. The unit for this numeric value (from 256 to 30720) is KB.

4.4.16. Workflow

This section describes the CSV file format for workflow data.

Categories

This section describes the CSV file format used to import categories.

CSV File Format

```
Parent category code, category code, category name, memo
```

Example Description:

Parent category code	Category code	Category name	Notes
ROOT_CATEGORY	category001	Accounting	
category001	category031	Outdated forms	
category001	category032	Exceptions	
ROOT_CATEGORY	category002	Salary	

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Parent Category Code	100 characters		For the category to be placed in the root, specify "ROOT_CATEGORY". If omitted, category is placed in the root.
Category Code	100 characters	✔	
Category Names	100 characters	✔	
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Category Names

This section describes the CSV file format used to import category names for each language.

Caution

- If a category code of a category that has not been registered in Garoon is set, category names will not be imported for each language.
- Importing a CSV file does not delete existing category names (for each language) that are not included in the CSV file.

However, even if you specify "language code", leaving the "Category Name" field blank results in the category name for that language being deleted.

CSV File Format

Category code, language code, category name

Example Description:

Category code	Language code	Category name
category001	ja	経理関連
category001	en	Accounting
category002	ja	給与関連
category005	ja	情報システム関連

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Category names	100 characters		Specify category names for each language.

User Rights

This section describes the CSV file format used to import access permissions.

Access permissions are set for categories. For each category for which you want to set access permissions, describe the lines to set security model and the lines to set access permissions.

Note

- When you import access permissions data, an error occurs if the target described in the CSV file has not been added to Garoon.
- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:

  Describe the security model for the category. The format is as follows.

  ```
  Category code, setting items, settings
  ```

- Lines for setting access permissions:

  Describe access permissions to be set in separate lines for each target. The format is as follows.

  ```
  Category code, setting items, settings, target
  ```

Example:

	Category code	Items	Values	Targets	
	ROOT_CATEGORY	security_model	revoke		
a)	category001	security_model	grant		c)
a)	category001	static_role	B	Department manager	d)
a)	category001	group	B	HR01	d)
b)	category002	security_model	revoke		c)
b)	category002	user		BarbaraMiller	d)

a): 1st data

b): 2nd data

c): Lines for setting up the security model

d): Lines for setting access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	Specify "security_model".
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	Specify the same category code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles.

Item	Number of characters	Required item	Remarks
			• static_role Specify this if you set access permissions for a role.
Available Values			• If you specified the security model "revoke" to select targets to be restricted: Do not specify any value. When a user, organization, or role you specified had already been registered, if you import the CSV file with the value "B", that registration information will be deleted. • When you specified the security model "grant" to select targets: Specify "B". When a user, organization, or role you specified had already been registered, if you import the CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name When you specify a "user" as "Items", describe the login name of that user. • Organization code When you specify a "group" as "Items", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

Operational Administrative Privileges

This section describes the CSV file format used to import operational administrative privileges.
Grant operational administrative privileges for each category.
You can import operational administrative privileges in Garoon version 5.9.0 or later.

Note

- When you import the data of operational administrative privileges, an error occurs if the target described in the CSV file has not been added to Garoon.
- Data written in the CSV file is added to the operational administrative privileges.
  Existing settings for the operational administrative privileges are retained.

CSV File Format

```
Category code, setting items, target
```

Example Description:

Category code	Items	Targets
category01	group	Sys01
category01	role	Manager
category02	user	JohnJones
category02	user	MariaJackson

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	This item specifies the type of target for which you want to grant operational administrative privileges. The following types can be specified. • user Specify this if you grant operational administrative privileges to users. • group Specify this if you grant operational administrative privileges to organizations.

Item	Number of characters	Required item	Remarks
			• dynamic_role Specify this if you grant operational administrative privileges to dynamic roles. • role Specify this if you grant operational administrative privileges to static roles.
Targets	100 characters		Depending on the type you specified, describe a code. The following codes can be described. • Login name When you specify a "user" as "Items", describe the login name of that user. • Organization code When you specify a "group" as "Items", describe the organization code of that organization. • Role name When you specify a "dynamic_role" or "dynamic_role" as "Items", describe the role name of that role.

Proxy Applicant

This section describes the CSV file format used to import proxy applicants.

Note

- If duplicated lines with the same login name exist, the last line will be applied.

CSV File Format

```
Login name, proxy applicant's login name
```

Example Description:

Login name	Proxy applicant login name
BarbaraMiller	WilliamTaylor
MariaJackson	LindaBrown

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login name	100 characters	✔	Specify a login name that is registered in Garoon.
Proxy applicant's login name	100 characters	✔	Specify a login name that is registered in Garoon.

Proxy Approver

This section describes the CSV file format used to import proxy approvers.

Note

- If duplicated lines with the same login name exist, the last line will be applied.

CSV File Format

```
Login name, proxy approver's login name
```

Example Description:

Login name	Proxy approver login name
ThomasRobinson	JenniferAnderson
DavidThomas	BarbaraMiller

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Login name	100 characters	✔	Specify a login name that is registered in Garoon.
Proxy approver's login name	100 characters	✔	Specify a login name that is registered in Garoon.

Request Data

This section describes the file format when request data is exported to a CSV file.
The request data can only be exported to a CSV file. It cannot be imported from a CSV file.
CSV file format varies depending on whether you export data manually or automatically.

Request Data Exported Manually

This section describes the format of the data output to a CSV file when the request data is exported manually.

CSV File Format

- Request Form Information

  Number, applicant name, (applicant's login name,) request date and time, request form name, status, subject, item value 1, item value 2,...

Example:

Number	Applicant name	Applicant login name	Request date	Form	Status	Subject
1	Barbara Miller	BarbaraMiller	2019/09/25(Wed) 15:58	Business trip (Domestic)	Complete	Houston (Oct. 5 - Oct. 7)
2	Thomas Robinson	ThomasRobinson	2019/09/25(Wed) 16:20	Business trip (Domestic)	Approved	New York (Sept. 27 - Sept. 30)

- Route Information

  Route step name, user name 1, result 1, comment 1, processed date and time 1, user name 2, result 2, comment 2, processed date and time 2,...

Example:

Step 1: Step name	Step 1: User name 1	Step 1: Results	Step 1: Comment	Step 1: Processed			
Section manager					Department manager	Jennifer Anderson	Approved
Section manager	Linda Brown	Rejected		2019/09/25(Wed) 20:23	Department manager	Thomas Robinson	

CSV File Items and Specifications

- Request Form Information

Item	Remarks
Number	The request number is described.
Applicant Name	The name of the applicant is described.
Applicant's Login Name	The login name of the applicant is described.
Requested	The date and time when the applicant submitted the request data.
Request Form Name	This describes the name of the request form that is used.
Status	The status of the request data is described.
Subject	The subject entered by the applicant is described.
Item Value	The details entered in the request item field by the applicant will be described.

- Route Information

Item	Remarks
Route Step Name	The name of the route step is described.
User name	The user name of the user who processed the request data is described.
Result	The processing results are described.
Comment	A comment entered by the processor is described.
Processed date and time	Describes the date and time when the route step was processed.

Note

- When you select "route" for an item to export, and then export item names to the first row, only the first one of processors in the first route step will be exported as "Route 1" item name. The item names for other route steps or processors will not be exported.

Request Data Exported Automatically

This section describes the format of the data output to a CSV file when the request data is exported automatically.

CSV File Format

- Request Form Information

  The "Start and End columns of fields" and "Route start column" are added to the format for manual export.

> Number, applicant name, (Applicant's login name,) request date and time, request form name, start and end columns of fields, route start column, subject, status, item name 1, item value 1, item name 2, item value 2,...

Example:

Number	Applicant name	Applicant login name	Request date	Form	Start and end columns used for item details	Start columns used for route details	Subject	Status	Item name 1	Item value 1	Item name 2	Item value 2
7	Barbara Miller	BarbaraMiller	2019/09/26(Thu) 14:31	Business trip (Domestic)	9,30	31,36,41,50,55	Los Angeles	Approved	Subject	Los Angeles	Date	2019/10/10(Thu)

- Route Information

> Route 1: Route step name, Route 1: User Name 1, Route 1: Results, Route 1: Comment, Route 1: Process date, Route 2: Route step name,...

Example:

Route 1: Route step name	Route 1: User name1	Route 1: Result	Route 1: Comment	Route 1: Processed	Route 2: Route step name	Route 2: User name1	Route 2: Result	Route 2: Comment	Route 2: Processed
Section manager	Linda Brown	Approved		2019/09/26(Thu) 14:31	Department manager	Thomas Robinson	Approved	Confirmed.	2019/09/26(Thu) 14:31

CSV File Items and Specifications:

- Request Form Information

Item	Remarks
Number	The request number is described.
Applicant Name	The name of the applicant is described.
Requested	The date and time when the applicant made the request are described.
Request Form Name	This describes the name of the request form that is used.
Start and End columns of fields	Export the start and end positions (columns) of the item information in the exported CSV file. The column starts from 0. An example of an item description with start column of 10 and end column of 67: 9,66
Route start column	Export the start position (column) of each route information in the exported CSV file. The column starts from 0. An example of description of route start columns (Route 1 = column 68, Route 2 = column 73, Route 3 = column 78): 67,72,77
Subject	The subject entered by the applicant is described.
Status	The status of the request data is described.
Item name	The name of the request item is described.
Item Value	The details entered in the request item field by the applicant will be described.

- Route Information

Item	Remarks
Route Step Name	The name of the route step is described.
User name	The user name of the user who processed the request data is described.

Item	Remarks
Result	The processing results are described.
Comment	A comment entered by the processor is described.
Processed date and time	Describes the date and time when the route step was processed.

4.4.17. MultiReport

This section describes the CSV file format for MultiReport data.

Categories

This section describes the CSV file format used to import categories.

CSV File Format

```
Parent category code, category code, category name, memo
```

Example Description:

Parent category code	Category code	Category name	Notes
ROOT_CATEGORY	category01	Headquarters	
ROOT_CATEGORY	category02	Administrative division	
category02	category03	HR department	
category02	category04	Accounting department	

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Parent Category Code	100 characters		For the category to be placed in the root, specify "ROOT_CATEGORY". If omitted, category is placed in the root.
Category Code	100 characters	✔	
Category Names	100 characters	✔	Specify a standard category name.
Memo	65,535 characters		The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Category Names

This section describes the CSV file format used to import category names for each language.

Caution

- If a category code of a category that has not been registered in Garoon is set, category names will not be imported for each language.
- Importing a CSV file does not delete existing category names (for each language) that are not included in the CSV file.
  However, even if you specify "language code", leaving the "Category Name" field blank results in the category name for that language being deleted.

CSV File Format

```
Category code, language code, category name
```

Example Description:

Category code	Language code	Category name
category01	ja	本社
category01	en	Headquarters
category03	ja	人事部
category03	en	HR department

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Language code		✔	Specify one of the following language codes. • ja Language code for Japanese. • en Language code for English. • zh Language code for Chinese (Simplified). • zh-tw Language code for Chinese (Traditional). This is used for Chinese characters displayed in Traditional Chinese.
Category names	100 characters		Specify category names for each language.

User Rights

This section describes the CSV file format used to import access permissions.

Access permissions are set for categories. For each category for which you want to set access permissions, describe the lines to set security model and the lines to set access permissions.

Note

- When you import access permissions data, an error occurs if the target described in the CSV file has not been added to Garoon.
- Importing access permissions data from a CSV file reads the difference from existing access permissions data.

CSV File Format

- Lines for setting the security model:

  Describe the security model for the category. The format is as follows.

  ```
  Category code, setting items, settings
  ```

- Lines for setting access permissions:

  Describe access permissions to be set in separate lines for each target. The format is as follows.

  ```
  Category code, setting items, settings, target
  ```

Example Description:

Category code	Items	Values	Targets
ROOT_CATEGORY	security_model	revoke	
category001	security_model	grant	
category001	static_role	B	Department manager
category001	group	B	HR01
category002	security_model	revoke	
category002	user		BarbaraMiller

a): 1st data

b): 2nd data

c): Lines for setting up the security model

D): Lines for setting up the access permissions

Items and Specifications for the Lines to Set the Security Model

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	
Items		✔	Specify "security_model".

Item	Number of characters	Required item	Remarks
Available Values		✔	Specify one of the followings. • revoke Specify this if you want to select a target to be restricted. • grant Specify this if you want to select a target to be granted a permission. For details on "revoke" and "grant", refer to the description regarding the security model(46Page).

Items and Specifications for Lines to Set User Rights

Item	Number of characters	Required item	Remarks
Category Code	100 characters	✔	Specify the same category code as the one you specified in the line where you set the security model.
Items		✔	This item specifies the type of target for which you want to set access permissions. The following types can be specified. • user Specify this if you set access permissions for users. • group Specify this if you set access permissions for organizations. • dynamic_role Specify this if you set access permissions for dynamic roles. • role Specify this if you set access permissions for a role.
Available Values			• If you specified the security model "revoke" to select targets to be restricted: Do not specify any value.

Item	Number of characters	Required item	Remarks
			When a user, organization, or role you specified had already been registered, if you import the CSV file with the value "B", that registration information will be deleted. • When you specified the security model "grant" to select targets: Specify "B". When a user, organization, or role you specified had already been registered, if you import the CSV file with the empty value, that registration information will be deleted.
Targets	100 characters	✔	Depending on the type you specified, describe a code. The following codes can be described. • Login name When you specify a "user" as "Items", describe the login name of that user. • Organization code When you specify a "group" as "Items", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role", describe the role name of that role.

Reports

This section describes the file format when report data is exported to a CSV file.

The report data can only be exported to a CSV file. The report data cannot be imported from a CSV file.

CSV File Format

```
Subject, author, created on, attendees, outside parties, item 1, item 2,..., comment
```

Example:

Subject	Author	Created d	Attendees	Outside p	Date of bus	Destinatio	Details	Remaining	Comment	Attachments
Business trip report: Shanghai plant	Barbara Miller	Tue, October 01, 2019 11:40 AM	Barbara Miller;Thomas Robinson	Emma Harris;Noah Lopez	2019/9/30	Shanghai plant	Check progress of the construction work Visit Shanghai Branch	Building construction progresses as scheduled. Installation of communication equipment is delayed.	The delay in communication equipment work was caused by wrong purchase order. I have asked the vendor to immediately arrange all necessary equipment.	Survey_results.pdf

CSV File Items and Specifications

Item	Remarks
Subject	The subject entered by the report author.
Created by	The user name of the report author.
Created on	The creation date and time of the report.
Attendees	The user name that has been added to the "Attendees" field.
Outside parties	The display name of the address in the shared address book that has been added to the field for outside parties.
Item	Contents of this field is exported.

Item	Remarks
Comment	All comments written to the report are exported.

4.4.18. Presence Indicators

This section describes the CSV file format used to import proxies.

CSV File Format

```
Target type, target code, setting items, settings, target
```

Example Description:

Target type	Target code	Items	Values	Targets
user	BarbaraMiller	group	M	Sales01
user	BarbaraMiller	user	M	LindaBrown
user	BarbaraMiller	user	M	ThomasRobinson

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Target type		✔	This item specifies the type of target for which you want to set a proxy. The following types can be specified. • user Specify this if you set a proxy for a user. • group Specify this if you set a proxy for an organization.
Target Code	100 characters	✔	According to the "Target type", specify the login name of the user or the organization code of the organization for whom you set a proxy.

Item	Number of characters	Required item	Remarks
Items		✔	This item specifies the type of the proxy. The following types can be specified. • user Specify this if you set a user as a proxy. • group Specify this if you set an organization as a proxy.
Available Values		✔	Specify "M" (Modify).
Targets	100 characters	✔	According to the target type, specify the login name of the user or the organization code of the organization you specify as a proxy.

4.4.19. KUNAI

This section describes the CSV file format used to import permissions.

Caution

- If permissions that have been registered in Garoon are not included in the CSV file, they will be deleted. We recommend that you export existing permissions to a CSV file to create a file for import.

CSV File Format

```
Setting items, Targets, Scheduler, Messages, Workflow, e-mail, Address Book, Space, Bulletin Board, Multireport
```

Example Description:

Items	Targets	Scheduler	Messages	Workflow	E-mail	Address B	Space	Bulletin B	MultiReport
dynamic_r	Everyone	1	1			1	1	1	1
static_role	Manager	1	1	1	1	1	1	1	1
user	Barbara Miller				1				

CSV File Items and Specifications

Item	Number of characters	Required item	Remarks
Items		✓	This item specifies the type of target for which you want to set permissions. The following types can be specified. • user Specify this if you set permissions for a user. • group Specify this if you set permissions for an organization. • dynamic_role Specify this if you set permissions for a dynamic role. • static_role Specify this if you set permissions for a static role.
Targets	100 characters	✓	Depending on the type you specified, you can use one of the followings. • Login name If you specified "user" as "Items", describe the login name of that user. • Organization code If you specified "group" as "Items", describe the organization code of that organization. • Role name If you specified "dynamic_role" or "static_role" as "Items", describe the role name of that role. If you describe a login name, organization code, or role name that is not registered in Garoon, an error occurs when you import the CSV file. When multiple combinations of setting items and

Item	Number of characters	Required item	Remarks
			targets exist in a CSV file, the contents of the last imported row overwrite the others.
Scheduler Messages Workflow E-mail Address Book Space Bulletin Board MultiReport			Specify one of the following values: • 0 Specify this if you want to prohibit access. • 1 Specify this if you want to allow access. If omitted, "0: Prohibit use" is imported. Entering any value other than "0" or "1" causes an error when the CSV file is imported.

4.5. Default Value List of Features and Applications

This section describes the default functions and applications.

References

- Default Values for Users(1924Page)
- Default Values for Screen Items(1942Page)

4.5.1. Default Values for Applications

List of Applications

Portal

Item	Default value:
Application ID	portal
Use	Use
Name	日本語:ポータル English: Portal 中文 (简体): 门户 中文 (繁體): 首頁
Description	Portal

Space

Item	Default value:
Application ID	space
Use	Use
Name	日本語:スペース English: Space 中文 (简体): 空间 中文 (繁體): 社群
Description	Space

Bookmarks

Item	Default value:
Application ID	link
Use	Use
Name	日本語 : リンク集 English: Bookmarks 中文 (简体): 书签 中文 (繁體): 書籤
Description	Bookmarks

Scheduler

Item	Default value:
Application ID	schedule
Use	Use
Name	日本語 : スケジュール English: Scheduler 中文 (简体): 日程安排 中文 (繁體): 排程
Description	Scheduler

Messages

Item	Default value:
Application ID	message
Use	Use
Name	日本語 : メッセージ English: Messages 中文 (简体): 站内信 中文 (繁體): 站內信

Item	Default value:
Description	Messages

Bulletin Board

Item	Default value:
Application ID	bulletin
Use	Use
Name	日本語：掲示板 English: Bulletin Board 中文 (简体): 公告栏 中文 (繁體): 公告欄
Description	Bulletin Board

Cabinet

Item	Default value:
Application ID	cabinet
Use	Use
Name	日本語：ファイル管理 English: Cabinet 中文 (简体): 文件管理 中文 (繁體): 文件管理
Description	Cabinet

Memo

Item	Default value:
Application ID	memo
Use	Use
Name	日本語：メモ English: Memo 中文 (简体): 备忘录 中文 (繁體): 備忘錄
Description	Memo

Phone Messages

Item	Default value:
Application ID	phonemessage
Use	Use
Name	日本語：電話メモ English: Phone Messages 中文 (简体): 电话记录 中文 (繁體): 電話記錄
Description	Phone Messages

Timesheet

Item	Default value:
Application ID	timecard
Use	Use
Name	日本語：タイムカード English: Timesheet 中文 (简体): 考勤卡 中文 (繁體): 考勤卡

Item	Default value:
Description	Timesheet

To-Do List

Item	Default value:
Application ID	todo
Use	Use
Name	日本語 : ToDoリスト English: To-Do List 中文 (简体): ToDo列表 中文 (繁體): ToDo列表
Description	To-Do List

Address Books

Item	Default value:
Application ID	address
Use	Use
Name	日本語 : アドレス帳 English: Address Book 中文 (简体): 通讯录 中文 (繁體): 通訊錄
Description	Address Book

E-mail

Item	Default value:
Application ID	mail
Use	Use
Name	日本語：メール English: E-mail 中文 (简体): E-mail 中文 (繁體): E-mail
Description	E-mail

Workflow

Item	Default value:
Application ID	workflow
Use	Use
Name	日本語：ワークフロー English: Workflow 中文 (简体): Workflow 中文 (繁體): Workflow
Description	Workflow

MultiReport

Item	Default value:
Application ID	report
Use	Use
Name	日本語：マルチレポート English: MultiReport 中文 (简体): 多功能报告 中文 (繁體): 多功能報告

Item	Default value:
Description	MultiReport

Cybozu Online Service

Item	Default value:
Application ID	cbwebsrv
Use	Use
Description	Cybozu Online Service

Presence Indicators

Item	Default value:
Application ID	presence
Use	Use
Name	日本語：在席確認 English: Presence indicators 中文 (简体): 在岗确认 中文 (繁體): 在崗確認
Description	Presence indicators

Favorite

Item	Default value:
Application ID	star
Use	Use
Name	日本語：お気に入り English: Favorite

Item	Default value:
	中文 (简体): 收藏夹 中文 (繁體): 我的最愛
Description	Favorite

Notifications

Item	Default value:
Application ID	notification
Use	Use
Name	日本語：通知一覧 English: Notifications 中文 (简体): 通知列表 中文 (繁體): 通知列表
Description	Notifications

KUNAI

Item	Default value:
Application ID	kunai
Use	Use
Name	日本語：KUNAI English: KUNAI 中文 (简体): KUNAI 中文 (繁體): KUNAI
Description	KUNAI

Respond

Item	Default value:
Application ID	favour
Use	Use
Name	日本語：いいね！ English: Like 中文 (简体): 顶 中文 (繁體): 頂
Description	Respond

Cybozu Office / Dezie Connector

Item	Default value:
Application ID	dezielink
Use	Use
Description	Cybozu Office / Dezie Connector

Image Assets

Item	Default value:
Application ID	assets
Use	Use
Name	日本語：画像アセット English: Image Assets 中文 (简体): 图像资产 中文 (繁體): 圖像資產
Description	Image Assets

User Settings

Item	Default value:
Target	Everyone
Available on	All applications used

Remote Access Rule

Item	Default value:
Remote access rule	Allow all

Import IP Addresses

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export IP Addresses

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Importing Application Users

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting Application Users

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.2. Default Values for Users

Organization/User Settings

Adding Organizations

Item	Default value:
Organization Name	日本語

Adding Users

Item	Default value:
Name (standard language)	日本語

Role Settings

Item	Default value:
Permission to select roles	Allow: ON

User Information Items

Details of Built-in Items

Name

Item	Default value:
Item name	Name
Item code	display_name
Use	Enable: ON
Public	Publish on
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Login Name

Item	Default value:
Item name	Login name
Item code	foreign_key

Item	Default value:
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Locale

Item	Default value:
Item name	Locale
Item code	locale
Use	Enable: ON
Public	Publish on
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Office

Item	Default value:
Item name	Office
Item code	base
Use	Enable: ON
Public	Publish on
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Organization

Item	Default value:
Item name	Organization
Item code	usergroups
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Priority Organization

Item	Default value:
Item name	Priority organization
Item code	primary_group
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Presence Information

Item	Default value:
Item name	Presence information
Item code	attendee
Use	Enable: ON
Public	Publish on
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target

Item	Default value:
Single Sign-On	(None)

Pronunciation

Item	Default value:
Item name	Pronunciation
Item code	sort_key
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

E-mail

Item	Default value:
Item name	E-mail
Item code	email_address
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required

Item	Default value:
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Memo

Item	Default value:
Item name	Memo
Item code	description
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Job Titles

Item	Default value:
Item name	Job title
Item code	post
Use	Enable: ON
Public	Publish on

Item	Default value:
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Contacts

Item	Default value:
Item name	Contacts
Item code	telephone_number
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

URL

Item	Default value:
Item name	URL
Item code	url

Item	Default value:
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Picture

Item	Default value:
Item name	Picture
Item code	image
Use	Enable: ON
Public	Publish on
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Adding Custom Items

Item	Default value:
Type	String (one line)
Item code	userinfo1
Use	Status: Active
Public	Publish: Off
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Search in	Include in search target
Single Sign-On	(None)

Limitations on Passwords

Item	Default value:
Changing passwords in personal settings	Allow
Log in with an empty password	Allow
Password length	0
Password expiration	Unlimited
Expiration notifications	Do not notify
Limitations on available characters	Do not set

Deletion Time of User Data

Item	Default value:
Deleting user Data [1]	Do not delete: Off

[1]: If the system time zone is "(UTC + 09:00) Osaka, Sapporo, and Tokyo", the "Do not delete" option is the default value.

Import from CSV File

Organization Details

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Organization Member Data

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Organization Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

User Information

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Item	Default value
CSV File Format	Use version 3.0 or earlier format: off

Membership Information Data

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Role Data by User

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Role Details

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

User Data by Role

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Organization Details

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Organization Member Data

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Organization Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

User Information

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
CSV File Format	Use version 3.0 or earlier format: off

Membership Information Data

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Role Data by User

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Role Details

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

User Data by Role

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.3. Default Values for Authentication

Login Authentication

Standard authentication

Item	Default value:
Standard Authentication	Active
Name	Standard Authentication
Authentication Database [1]	Standard database

[1]: When the "Use Multiple authentication databases" check box is selected, the default value for the availability of each authentication database is as follows:

- Database set by system administrator: do not use
- Standard database: Use

Adding a login authentication

The Login authentication format is environment variable authentication.

Item	Default value:
Environment variable format	Login name
Authentication Database	Standard database

Session Authentication

Standard authentication

Item	Default value:
Standard Authentication	Enable
Name	Standard Authentication

Item	Default value:
Authentication Database	Standard database

Adding session authentication

The session authentication format is environment variable authentication.

Item	Default value:
Environment variable format	Login name
Authentication Database	Standard database

Adding session authentication

The session authentication format is open integrated Authentication ver. 2.

Item	Default value:
Mode	Open Integrated Authentication ver.2
Cookie name	CB_OPENAUTH
Active Time	6 hours
Authentication Database	Standard database

Adding session authentication

The session authentication format is open integrated authentication Ver.1 (deprecated).

Item	Default value:
Active Time	10 min.
Authentication Database	Standard database

Authentication Database

Adding authentication databases

The authentication database format is LDAP.

Item	Default value:
Use of SSL	Use SSL for communication with the server: off
port number	389
Use Anonymous	Status: Active
Authentication type	Flat password (simple authentication)
Connection Conditions [1]	Setting connection conditions: Off

[1]: When the "Set Connection conditions" check box is selected, the default value is as follows:

- Exclude prefix/suffix strings from the login name during authentication: off

4.5.4. Default Values for Single Sign-On

Single Sign-on Settings (System Administration)

Item	Default value:
Options	Open in another window: off Allow personal settings: off
GET items (for users) or POST items (for users)	Default: Manual Input
GET items (for system) or POST items (for system)	Default: Manual Input

Single Sign-on Settings (Personal Settings)

Item	Default value:
GET items (for users) or POST items (for users)	Value set by system administrator

4.5.5. Default Values for Files

General Settings

Item	Default value:
Limit file Size	1024MB
Upper limit for versioning	Unlimited
Period of locking	Unlimited
Locking feature	Enable: ON

MIME Type

For details on the pre-configured MIME types, refer to Setting up MIME types(238Page).

Importing MIME Type

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting MIME Type

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.6. Default Values for Screens

General Settings

Common Settings

Item	Default value:
Mobile View	Allow: ON
Profile pictures	Allow: ON
Thumbnail images	Enabling: On

Default Values for Personal Settings

Item	Default value:
Number of items to be displayed on the list screen	20
Number of comments displayed on the screen	20
Width to display subject	30
Width to display excerpts such as body text and comments	20
The width of the sender or recipient.	20
E-mail address	Start the e-mail program in the Web browser (mailto: link)
Image file (GIF, JPEG, etc.)	Display with body text: on
Character encoding to be output to a file	Select on exporting
Information to display after user name	English name: Off Priority organizations: OFF
Width of input field	50
The vertical width of the input field	15
Apply to all users	Off

Design Settings

Item	Default value:
Design	Standard

Header and Footer Settings

Item	Default value:
Show Application Menu	Show: ON
Application Menu Format	Subject
Personal settings	Allow changing of settings in personal settings: off

Application Menu List

Adding Application Menu

Item	Default value:
Links to or from any URL.	Links within applications
Subject (Language)	日本語
Links within applications	Portal

Application Menu

Item	Default value:
Portal	Title (standard): Portal Links in the Application menu
Space	Title (standard): space Links in the Application menu: My space
Bookmarks	Title (standard): Links Links in the Application menu
Scheduler	Title (standard): Scheduler Links in the Application menu: Group Week view

Item	Default value:
Messages	Title (standard): Messages Links in the Application menu: Messages
Bulletin Board	Title (standard): bulletin board Links in the Application menu: bulletin board
Cabinet	Title (Standard): File administration Links to the Application menu: Managing Files
Memo	Title (standard): Notes Links in the Application menu: Notes
Phone Messages	Title (standard): Phone notes Links in the Application menu: Phone notes
Timesheet	Title (standard): timecard Link to the Application menu: timecard
To-Do List	Title (standard): To-do List Links to the Application menu: to-do List (to me)
Address Book	Title (Standard) Links in the Application menu
E-mail	Title (standard): E-mail Links in the Application menu: E-mail
Workflow	Title (standard): workflow Links in the Application menu: Workflow
MultiReport	Title (standard): Multireport Links in the Application menu: Multireport
Favorite	Title (Standard): Favorites Links in the Application menu: Favorites
Notifications	Title (standard): Notifications Links in the Application menu: Notifications

Drop-Down List Settings

Item	Default value:
Personal settings	Allow changes in personal settings: off
Number of views	Organization: 10 Users: 10 Facility Group: 10 Facilities: 10
Delete history	Organization: OFF User: Off Facility Group: Off Facilities: Off

4.5.7. Default Values for Calendar

Calendar Settings

Immediately after the introduction of Garoon, a Japanese national holiday has been added to the standard calendar as an event.

Adding Events

Item	Default value:
Date	Monday, April 1, 2019[1]
Event Type	Holidays

[1]: Date is an example of accessing the System administration page on April 1, 2019.

Importing Events

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting Events

Item	Default value:
Period to export	All periods
Character encoding	Japanese (Shift-JIS)
Include header row	No

Office Settings

Adding Offices

Item	Default value:
Office name (language)	日本語
Working day	Day: On Month: On Fire: On Water: On Thu: On Gold: On Sat: On

Item	Default value:
Working time	0:00 am – 23:00am
Calendars	Standard calendars Apply Calendar workday: on

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Office Information

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Office Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: On Japanese: OFF English: OFF

Item	Default value
	Simplified Chinese: OFF Traditional Chinese: OFF

4.5.8. Default Values for Logging

Log List

Item	Default value:
Category	(All)
Error	LOG: Do not output Output destination: Both (database Log/system log)
Warning	LOG: Do not output Output destination: Both (database Log/system log)
Important	LOG: Do not output Output destination: Both (database Log/system log)
General	LOG: Do not output Output destination: Both (database Log/system log)

Archiving Settings

Item	Default value:
Archive retention Period	3 years
Archive format	XLSX

Item	Default value:
Archive schedule	Sunday 0:00 AM

4.5.9. Default Values for External Servers

Setting up System Mail Account

Item	Default value:
System Mail Account	Enable
Outgoing port number	25
Encryption method	(Disabled)
Time-out period	10
SMTP authentication method	(None)
Authenticate before sending e-mail (POP before SMTP)	Do not set

Web Proxy Settings

Item	Default value:
Web Proxy	Enable
Proxy Server port number	8080

4.5.10. Default Values for Localization

General Settings

Item	Default value:
Languages available	日本語 English Simplified Chinese Traditional Chinese
Frequently used time zone	(UTC + 09:00) Tokyo [1]
Locales for printing	Language: Japanese Long date format: Monday, April 01, 2019 [2] Short Date format: 04/01 (Mon) [2] Time Format: 10:00 [3]
Personal settings	Allow changing locale: on Allow office to be changed: on
User profile	Use the English spelling field
Default Locale	Language: Japanese Region of the time zone: Asia Time zone: (UTC + 9:00) Tokyo [1]

[1]: For the time zone, refer to time zone(1791Page).

[2]: The date is an example of accessing the System administration page on April 1, 2019.

[3]: The time is an example of accessing the system administration screen at 10:00 am.

Locale Settings

Adding Locales

Item	Default value:
Locale name (language)	日本語
language	日本語
Long Date Format	01 Apr 2019 [1]
Short Date Format	01 Apr 2019 [1]
Time Format	10:00 AM[2]

[1]: Date is an example of accessing the System administration page on April 1, 2019.

[2]: The time is an example of accessing the system administration screen at 10:00 am.

4.5.11. Default Values for API

Proxy API Settings

Add Proxy API Settings

Item	Default value:
Status	Disabled
Method	GET

4.5.12. Default Values for Customization

JavaScript and CSS Customization

Adding Customization Group

Item	Default value
Customization	Applied
Applied to	Login user

4.5.13. Default Values for Portal

Portal List

Adding Portals

Item	Default value:
Portal Name (language)	日本語

Portal Details

Item	Default value:
Making Portals Public	Private
Layout	No settings

User Rights for Portals

Item	Default value
Security model	REVOKE (All users have access except users on list)

User Rights for Portlets

Item	Default value
Security model	REVOKE (All users have access except users on list)

Permissions for Setting of Default Portal

Item	Default value
Security model	GRANT (Only users on list have access)

Permissions for My Portal

Item	Default value
Security model	REVOKE (All users have access except users on list)

Portlet Groups

Adding Portlet Groups

Item	Default value:
Group name (language)	日本語

HTML Portlets

Adding HTML Portlets

Item	Default value:
Portlet Name (language)	日本語
My Portal	Allow access in my Portal: on
Portlet Details	Text

PHP Portlets

Adding PHP Portlets

Item	Default value:
Portlet Name (language)	日本語
My Portal	Allow access in my Portal: on

Importing from Files

HTML Portlet Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

PHP Portlet Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting to Files

HTML Portlets

Item	Default value:
HTML Portlets	(All HTML portlets)

HTML Portlet Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

Exporting PHP Portlets

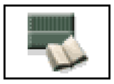
Item	Default value:
HTML Portlets	(All HTML portlets)

Exporting PHP Portlet Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

4.5.14. Default Values for Portlets

Application Menu Portlet

Item	Default value:
Character size	Standard
Wrapping	Fixed the Application menu.
Number of Wraps	5
Format	 Subject

Notices Portlet

Item	Default value:
Contents	Text
Frame/Background settings	Setting: Off

Calendars Portlet

Item	Default value:
Character size	Standard
System Calendar	Standard calendars
Standard calendars	1 month
When week starts	Week starts on Monday: OFF

Item	Default value:
Rokuyo	Show: OFF
Weather forecast	All items

Bookmarks Portlet

Item	Default value:
Shared/Personal	Sharing
Category	Root
Character size	Standard
Number of columns	1

Scheduler (Day View) Portlet

Item	Default value:
Character size	Standard
Target	Login user

Scheduler (Group Week View) Portlet

Item	Default value:
Character size	Standard
Target	Login user

Scheduler (Day View) Portlet

Item	Default value:
Character size	Standard
Target	Login user

Scheduler (Week View) Portlet

Item	Default value:
Character size	Standard
Target	Login user

Scheduler (Month View) Portlet

Item	Default value:
Character size	Standard
Target	Login user

Scheduler (Year View) Portlet

Item	Default value:
Character size	Standard

Messages Portlet

Item	Default value:
Character size	Standard
Folders	Inbox
Item	Subject: On From: On Re: On NOTES: On
Order	Update Order
Number of messages	5

Unread Messages Portlet

Item	Default value:
Character size	Standard
Item	Subject: On From: On Re: On NOTES: On
Number of messages	5

Message Acknowledgment Status Portlet

Item	Default value:
Character size	Standard
Item	Subject: On View status: On

Item	Default value:
	Created on Folder: On

Bulletin Board Portlet

Item	Default value:
Category	Root
Character size	Standard
Item	Title: On Details: On From: On Updated on
Number of messages	5

Unacknowledged Topics Portlet

Item	Default value:
Character size	Standard
Item	Title: On From: On Re: On Category: On
Number of messages	5

Cabinet Portlet

Item	Default value:
Folders	Root
Character size	Standard
Item	Title: On File name: On Updated by Updated on Size: On
Number of messages	5

Memo Portlet

Item	Default value:
Character size	Standard
Registered folder	Updated list
Length of input field	10

Phone Messages Portlet

Item	Default value:
Character size	Standard
Target	Priority organization

To-Do List Portlet

Item	Default value:
Character size	Standard
Number of views	All
Importance level	★★
Sort	Due date

User List Portlet

Item	Default value:
Character size	Standard
Items to be displayed	Name: On Login Name: Off Locale: Off Office: Off Organization: On Priority organizations: OFF Presence information: On Pronunciation: Off E-mail: On NOTES: Off Job Title: Off Contacts: On URL: Off
Target	Priority organization

New Incoming E-mail Portlet

Item	Default value:
Character size	Standard
Accounts	Default Account
New e-mail Check	Save E-mail check interval: 10 minutes

E-mail Portlet

Item	Default value:
Character size	Standard
Folders	Inbox
Item	Subject: On Status: On From: On Re: On Size: On
Order	Sent by
Number of messages	5

"Workflow" Portlet

Item	Default value:
Types of Lists	Inbox list
Character size	Standard
Item	Number: On Priority: On Request Form name (subject): On

Item	Default value:
	Status: On Applicant/Processor: on Request Date: On
Number of messages	5

MultiReport Portlet

Item	Default value:
Report/Filter	Type: report Report to be displayed, or filter to be applied: Receive list
Character size	Standard
Item	Report Form name (subject): On Created by Updated on
Number of messages	5

Weather Forecast Portlet

Item	Default value:
Character size	Standard
Rokuyo	Show: OFF
Weather forecast	All items

Types of Forecast Points

The weather forecast portlet displays the weather forecast for the selected region. You can select multiple forecast points.
The following forecast points can be selected

Wakkanai	Abashiri	Asahikawa	Muroran	Sapporo
Hakodate	青森	Akita	Morioka	Yamagata
Sendai	Fukushima	Niigata	Toyama	Kanazawa
Fukui	Utsunomiya	Maebashi	Kumagai	Mito
Chiba	Tokyo	Height	Yokohama	Nagano
Kofu	Nagoya	Shizuoka	Gifu	Tsu
Osaka	Kyoto	Hikone	Kobe	Nara
Wakayama	Hiroshima	Okayama	Tottori	松江
Yamaguchi	Takamatsu	Matsuyama	Kochi	Tokushima
Fukuoka	Saga	Nagasaki	Oita	Kumamoto
Miyazaki	Kagoshima	Naze	Naha	Minami-Daito
Miyako Island	Ishigaki			

Favorites Portlet

Item	Default value:
Character size	Standard
Application	All
Display items	Title: On Added: On
Number of messages	5

Notifications Portlet

Item	Default value:
Select design	Multi-line layout
Character size	Standard
Item	Subject: On Details: On Name: On Re: On
Format	List
Number of messages	5

Read Notifications Portlet

Item	Default value:
Character size	Standard
Item	Subject: On Space name: On Details: On Name: On Re: On
Application	(All)
Number of messages	5

4.5.15. Default Values for Spaces

System Administration

General Settings

Item	Default value:
Default visibility	Public
Unlimited setting for expiration date	Allow: ON
Default value for expiration date	Unlimited

Setting Categories

Adding Categories

Item	Default value
Subject (Language)	日本語
Category Code	Automatically configured code by Garoon

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Categories

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Category Names

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

4.5.16. Default Values for Bookmarks

General Settings

Item	Default value:
Opening a new destination window	Icon

Shared Bookmarks

Adding Shared Bookmarks

Item	Default value:
Single Sign-On	(None)

Adding Shared Categories

Item	Default value
Subject (Language)	日本語

Importing Shared Links and Dividers

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting Shared Links and Dividers

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

User Rights Settings

Item	Default value
Security model	REVOKE (All users have access except users on list)

Importing User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.17. Default value for Scheduler

System Administration

General Settings

Item	Default value:
Unit of time to make appointments (reservations)	30-minute increments
Repeating appointment periods	1 year
Private appointments	Allow: ON Default value: Public
Visibility of private appointments	Hiding Private Appointments Completely: OFF
Specify organizations/roles for the "Shared with" users	Allow: ON
Notifications to the "Shared with" users	Do not send notifications to the "Shared with" users: Off
Visibility of shared appointments	Show in the Scheduler screen: ON
Visibility of appointment of organizations	Show: OFF
Visibility of holidays	Show: ON
Visibility of all facilities	Show: ON
Visibility of facility names	Show before/after the appointment title: OFF Placement: After subjects
Drag and drop moving	Allow: ON
Attaching Files	Allow: ON
Attendance	Allow: OFF
Default value for allowing the response request feature	Request responses: OFF

Appointment Type Links

Adding Appointment Type Links

Item	Default value:
Appointment type name	(Unspecified)
Portlet	(Use sample)

Facilities/Facility Groups

Adding Facilities

Item	Default value:
Facility name (language)	日本語
V-CUBE Meeting[1]	Enable: OFF

[1]: It is shown when the V-CUBE Meeting Support is configured.

Adding Facility Groups

Item	Default value:
Facility group name (language)	日本語

Facility Reservation Settings

Item	Default value:
Inherit settings	Inherit parent facility group settings: ON
Maximum reservation period[1]	Unlimited
Maximum duration per reservation[1]	Unlimited

Item	Default value:
Users allowed to edit reservations[1]	Users with appropriate access rights
Show notes in appointment lists[1]	Show: OFF
Repeating appointments[1]	Allow: ON
Facility usage request[1]	Enable: OFF

[1]: Enabled when the option to inherit parent facility group settings is turned off in the "Inherit settings".

Items for Facility Reservation Information

Details of Built-in Items

Reservation Details

Item	Default value:
Item name	Reservation details
Item code	title_purpose
Type	String (one line)
Use	Enable: ON
List view	Show by default: ON
Item names in list field	Show by default: OFF

Created by

Item	Default value:
Item name	Created by
Item code	title_name

Item	Default value:
Type	String (one line)
Use	Enable: ON
List view	Show by default: OFF
Item names in list field	Show by default: OFF

Adding Custom Items

Item	Default value:
Type	String (one line)
Use	Status: Active
List view	Show by default: OFF
Item names in list field	Show by default: OFF

User Rights Settings

Item	Default value
Security model	REVOKE (All users have access except users on list)

Deleting All Schedules

Item	Default value:
Delete entries older than this date	Appointments older than one year from today

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Appointment

Item	Default value:
Period to export appointments	First to last day of the current month
Character encoding	Japanese (Shift-JIS)
Include header row	No
Export registrants	No

Facility Information

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Facility Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Item	Default value
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

Facility Group Information

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Facility Group Name

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

Operational Administrative Privileges for Facility Groups

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Default "Shared with"

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Setting up V-CUBE Meeting

Item	Default value:
V-CUBE Meeting	Enable: OFF
V-CUBE Meeting version	V-CUBE Meeting 5
Show Invitation URLs	Show on the details screen: OFF
E-mail notifications for invitation URLs	Send e-mail notifications: OFF

JavaScript and CSS Customization

Adding Customization Group

Item	Default value
Customization	Applied
Applied to	Login user

Personal Settings

Display Settings

Item	Default value:
Time period to show	8:00 - 19:00
When week starts	Week starts on Monday: OFF
Appointment ending time	Show appointment ending time on group week view and month view: ON
Drag and drop moving	Enable drag and drop moving of appointments: ON

Forwarding E-mail Notifications for Appointments

Item	Default value:
Forwarding appointment notifications	E-mail forward schedule notifications: OFF
E-mail address to receive notifications	E-Mail addresses in user profile [1]

[1]: It is displayed when any e-mail addresses are registered in the user information.

Importing Schedules

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting Schedules

Item	Default value:
Period to export	First to last day of the current month
Character encoding	Japanese (Shift-JIS)
Skip the first row	No

Scheduler Statistics

Item	Default value:
Date	First to last day of the current month
Working hours	Hours set in the "Time period to show" in "Display settings"
Character encoding	Japanese (Shift-JIS)
Handling of weekends and holidays	Include holiday appointments: OFF Include Saturday appointments: OFF Include Sunday appointments: OFF

Exporting Data to iCalendar Files

Item	Default value:
Period to export	First to last day of the current month

4.5.18. Default Values for Messages

System Administration

General Settings

Item	Default value:
Request acknowledgement status by default	Request responses: OFF
Permission to use rich text formatting	Allow: ON
View status Check Operation mode	Manual
Allow the use of anchor links in comments	Allow: ON

Deleting Messages in Bulk

Item	Default value:
Date to be deleted	A message that has not been updated a year earlier than today

Searching Messages

Item	Default value:
Target users	All users
Search period	Start Date: 3 months earlier than today End Date

Item	Default value:
Search items	Subject: On Full text: On Issued: On To: On Comment: On

JavaScript and CSS Customization

Adding Customization Group

Item	Default value
Customization	Applied
Applied to	Login user

Personal Settings

Update Notification Settings

Item	Default value:
Folder for which update notifications are set	Inbox: ON Sent items: ON Drafts: OFF

Filter Settings

Item	Default value
Filter conditions	Condition: All the following conditions are met Target: Subject Conditional expression: includes

Trash Settings

Item	Default value
Trash feature	Enable: ON
Trash retention period:	5 days

4.5.19. Default Values for Bulletin Board

System Administration

General Settings

Item	Default value
Default status of comment permission	Checked (Allow): ON
Permission to use rich text formatting	Allow: ON
Allow the use of anchor links in comments	Checked (Allow): ON
Request acknowledgement status by default	Request responses: OFF

Item	Default value
Manually enter "From" name	Allow: OFF Default "From" name: User name
Access permissions and notification recipients	Allow: ON

Setting Categories

Adding Categories

Item	Default value
Subject (Language)	日本語
Category Code	Automatically configured code by Garoon
Access Permissions	Apply access permissions of parent category or parent's subcategory: ON
Notification Settings	Apply notification settings of parent category or parent's subcategory: ON

User Rights Settings

Item	Default value
Security model	GRANT (Only users on list have access)

Notification Settings

Item	Default value
Forced notifications	OFF (Allow to stop receiving update notifications)

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Categories

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Category Names

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Operational Administrative Privileges

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Notification Settings

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Personal Settings

Auto-Settings for Update Notifications

Item	Default value
Subcategory settings	Apply update notification settings to subcategories automatically: OFF

4.5.20. Default Values for Cabinet

System Administration

General Settings

Item	Default value:
Retention period for deleted files/folders	5 days
Upper limit of bulk download	30MB

Setting up Folders

Adding Folders

Item	Default value
Subject (Language)	日本語
Folder code	Automatically configured code by Garoon
Access Permissions	Enforce permissions for parent or parent subfolders: on
Notification settings	Applying notification settings for a parent folder or a parent subfolder: on

User Rights Settings

Item	Default value
Security model	REVOKE (All users have access except users on list)

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Folder

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Folder Names

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Operational Administrative Privileges

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Notification Settings

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.21. Default Values for Memo

System Administration

General Settings

Item	Default value:
Maximum total file size	Unlimited
Permission to use rich text formatting	Allow: ON

4.5.22. Default Values for Phone Messages

System Administration

General Settings

Item	Default value:
Single Sign-On	(None)

User Rights Settings

Item	Default value
Security model	REVOKE (All users have access except users on list)

Importing User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Personal Settings

Forwarding E-mail Settings

Item	Default value:
Transferring phone messages	E-mail forwarding of phone notes: off

4.5.23. Default Values for Timesheet

System Administration

General Settings

Item	Default value:
Auto punch	Enable: ON
Start date of the aggregation	One day
Month View	0
Maximum number of out-of-office/back-	One time
The time when the date is changed	4:00
Allow users to change the time	Allow: ON

Timesheet List

Item	Default value:
Show IP address of each card punch	Off

Exporting Timesheets

Item	Default value:
Period to export	Start: Process Month Jutsuka End: End of the process month
Character encoding	Japanese (Shift-JIS)
Include header row	No

Personal Settings

Exporting Timesheets

Item	Default value:
Period to export	Start: Process Month Jutsuka End: End of the process month
Character encoding	Japanese (Shift-JIS)
Include header row	No

4.5.24. Default Values for Address Books

System Administration

Book List

Item	Default value:
Book Name (language)	日本語
Book Type	Standard database

Item Settings

Details of Built-in Items

Display as

Item	Default value:
Item name	Name
Type	String (one line)
Item code	subject
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Name

Item	Default value:
Item name	Name of individual
Type	String (one line)
Item code	personal_name
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Name (Pronunciation)

Item	Default value:
Item name	Pronunciation
Type	String (one line)
Item code	personal_sort_key
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Company Name

Item	Default value:
Item name	Company Name
Type	String (one line)
Item code	company_name
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Company Name (pronunciation)

Item	Default value:
Item name	Company Name (pronunciation)
Type	String (one line)
Item code	company_sort_key
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Department

Item	Default value:
Item name	Division Name
Type	String (one line)
Item code	section_name
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Zip Code

Item	Default value:
Item name	Zip code
Type	String (one line)
Item code	zip_code
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Address

Item	Default value:
Item name	Address
Type	String (one line)
Item code	physical_address
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Route

Item	Default value:
Item name	Route
Type	String (one line)
Item code	route
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Office Phone Number

Item	Default value:
Item name	Office Phone Number
Type	String (one line)
Item code	company_telephone_number
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Company FAX Number

Item	Default value:
Item name	Company FAX Number
Type	String (one line)
Item code	facsimile_number
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

URL

Item	Default value:
Item name	URL
Type	URL
Item code	url
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Job Title

Item	Default value:
Item name	Job Title
Type	String (one line)
Item code	post_name
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Personal Phone Number

Item	Default value:
Item name	Personal Phone Number
Type	String (one line)
Item code	personal_telephone_number
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

E-mail

Item	Default value:
Item name	E-mail
Type	E-mail
Item code	email_address
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Picture

Item	Default value:
Item name	Picture
Type	Files
Item code	image
Use	Enable: ON
List view	Show by default: ON
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Memo

Item	Default value:
Item name	Memo
Type	String (Multiple lines)
Item code	description
Use	Enable: ON
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Adding Custom Items

Item	Default value:
Type	String (one line)
Use	Status: Active
List view	Show by default: OFF
Required Field	To be required
Users cannot change settings	Users cannot be changed.
Single Sign-On	(None)

Setting up User Permissions

Item	Default value
Security model	REVOKE (All users have access except users on list)

User Rights Settings

Item	Default value
Security model	REVOKE (All users have access except users on list)

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Personal Settings

Setting up Items to Show

User List

Item	Default value:
Book Name	User list
Item	Login Name: Off Locale: On Office: On Organization: OFF Priority organizations: OFF Presence information: On Pronunciation: Off E-mail: Off NOTES: Off Job Title: Off Contacts: Off URL: Off Image: Off

Personal Address Books

Item	Default value:
Items to be displayed in the list	Display Name: On Personal name: On Pronunciation: Off Company Name: On Pronunciation: Off Section name: On Postal code: OFF Address: Off Route: Off Office Tel: off Company FAX Number: Off URL: Off Job Title: Off Personal phone Number: on E-mail: On Image: Off NOTES: Off

Importing Personal Address Books

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting Personal Address Books

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.25. Default Values for E-mails

System Administration

General Settings

Common Settings

Item	Default value
Stopping the e-mail client function	Do not set
Check new e-mail when logging in	Do not set

Item	Default value
Receive e-mails automatically	Do not set
Incremental search	Enable
Referencing images in HTML e-mail	Allow
Default HTML e-mail view	Displays only text: OFF
Send and receive log feature	Allow

User-Editable Settings

Item	Default value
Operations for e-mail account	Allow Allow only edit
Leave E-mail on Incoming Mail Server	Allow
Checking new e-mails feature	Allow
Receiving e-mails in bulk feature	Allow
Sending HTML e-mails feature	Allow
Automatic e-mail forwarding	Allow
Read receipts feature	Allow
Status management feature	Allow
E-mail screen settings	2 panes (windows without preview): Activated 3 panes (windows with preview): Activated

Setting up E-Mail Server

Item	Default value:
Using OAuth	Use OAuth for sending/receiving e-mails: Off
Outgoing port number	25
Encryption method	(Disabled)
SMTP authentication method	(None)
Send after receiving (POP before SMTP)	Do not set
Time-out period	10 seconds
Protocol for incoming e-mails	POP3
Incoming port number	110
Using TLS	Use TLS for connecting to an e-mail server: OFF
Enable APOP authentication	Disable
Time-out period	10 seconds

User Accounts

Item	Default value
E-mail on incoming mail server	Delete e-mail from server
Status	Deactivate e-mail account: OFF

E-mail Size

Item	Default value
Total size of e-mails that one user can save	Unlimited
Incoming e-mail quotas	1MB
Outgoing e-mail quotas	512KB

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

JavaScript and CSS Customization

JavaScript and CSS Customization function is available in Garoon version 5.5.0 or later.

Adding Customization Group

Item	Default value
Customization	Applied
Applied to	Login user

Personal Settings

General Settings

Item	Default value
Name format to be displayed in the list	Name
Preserve attachment	Preserve attachments in outgoing e-mails: ON
Confirmation before sending e-mail	Show confirmation screen before sending e-mails: ON
Character encoding of outgoing e-mails	Japanese (JIS)

Trash Settings

Item	Default value
Trash feature	Enable: ON
Trash retention period:	5 days

User Account Settings

Item	Default value
E-mail on incoming mail server	Delete e-mail from server
Status	Deactivate e-mail account: OFF

Signature Settings

Item	Default value
Signature position	After the quoted text

Update Notification Settings

Item	Default value
Folders to notify the updates	Inbox: ON Sent items: ON Drafts: OFF

Filter Settings

Item	Default value
Filter conditions	Condition: All the following conditions are met Target: Subject Conditional expression: includes
Status settings	Not yet configured

Automatic Forwarding Settings

Item	Default value
Transfer conditions	Condition: All the following conditions are met Target: Subject Conditional expression: includes

Read Receipt Settings

Item	Default value
Requests for read receipts	Show [Request read receipt] on the "Compose E-mail" screen: ON
Reply to requests for read receipts	Display a confirmation message

Status Management

Item	Default value
Status management feature	Enable: ON

4.5.26. Default Values for Workflow

System Administration

General Settings

Item	Default value:
Permission to use progress	Allow
Allow the applicant to reroute	Allow
Allow operational administrators to reroute	Allow
Allow system administrators to change route	Allow
Permission to use the appointment	Do not allow

Item	Default value:
Allow Proxy requests	Do not allow
Allow proxy approval	Do not allow
Allow users to set proxy settings	Do not allow
E-mail notifications permission	Do not allow
Auto-exported character encoding	Japanese (Shift-JIS)
Allow JavaScript and CSS customization	Do not allow

Request Form List

Category Details

Item	Default value:
Category Code	ROOT_CATEGORY[1]

[1]: Only "(root)" is applicable.

Adding Categories

Item	Default value
Subject (Language)	日本語

Adding Request Forms

Item	Default value:
Export request data automatically	Export automatically: Off

Settings of Request & Approval Number

Item	Default value:
Request numbering	Unique across all request forms
Approval numbering	None

JavaScript and CSS Customization

Item	Default value
Customization	Not applied

Adding Items

String (One Line)

Item	Default value:
Input width	20
Maximum number of characters	100
Limits	No Limit
Default value:	Direct input: On User information: User ID
Description	Show as icon: off
Item conditions	To be required To export items
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

String (Multiple Lines)

Item	Default value:
Size	Digits: 40 Lines: 3
Description	Show as icon: off
Item conditions	To be required To export items
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Menu

Item	Default value:
Menu item	Manually enter
Description	Show as icon: off
Item conditions	To be required To export items
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Radio Button

Item	Default value:
Description	Show as icon: off
Item conditions	To be required To export items

Item	Default value:
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Check Box

Item	Default value:
Default value:	Off
Description	Show as icon: off
Item conditions	To be required To export items
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Number

Item	Default value:
Limitation on input	No Limit
Number of decimal places	0
The way to show negative numbers	-1234
Description	Show as icon: off
Item conditions	To be required To export items
Format	Right-justified: off Show Thousands separator: off
Characters before or after the input field	not placed

Item	Default value:
To the right	Place item on same row as previous item : Off

Auto Calculation

Item	Default value:
Number of decimal places	0
The way to show negative numbers	-1234
Description	Show as icon: off
Item conditions	To be required To export items
Calculation details	Arithmetic operations
Format	Right-justified: off Show Thousands separator: off Hide calculation results on request form: off
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Date

Item	Default value:
Date format	Date only
Default value:	Current date
Description	Show as icon: off
Item conditions	To be required To export items

Item	Default value:
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Attachment

Item	Default value:
Maximum number of files	1
Description	Show as icon: off
Item conditions	To be required To export items
Format	Show images with body: off Shrink Image: Off Width: 50px Height: 50px
Characters before or after the input field	not placed
To the right	Place item on same row as previous item : Off

Route Navigation

Item	Default value:
Import information	Route/Fares
Description	Show as icon: off
Item conditions	To be required To export items
Characters before or after the input field	not placed

Item	Default value:
To the right	Place item on same row as previous item : Off

Add Items for JavaScript Customization

Item	Default value:
To the right	Place item on same row as previous item : Off

Set Auto Add to Scheduler

Item	Default value:
Auto add to Scheduler	Auto Add to Scheduler: Off
Period	Regular

Setting Dedicated Routes

Item	Default value:
Route description	Turn the description icon off

Adding Route Steps

Item	Default value:
Route type	Approval route: approved by all Routing route
Allow Route change	Allow: OFF

Allowing to Change Default Values

Item	Default value:
Allow the applicant to change the default value	Allow the applicant to change the default value

Route List

Adding a Shared Route

Item	Default value:
Route description	Turn the description icon off

Adding Route Steps

Item	Default value:
Route type	Approval route: approved by all Routing route
Allow Route change	Allow: OFF

Allowing to Change Default Values

Item	Default value:
Allow the applicant to change the default value	Allow the applicant to change the default value

User Rights Settings

Item	Default value
Security model	REVOKE (All users have access except users on list)

Settings to Make Request Data Public

Item	Default value
Security model	GRANT (Only users on list have access)

Managing Request Data

Exporting Request Data

Item	Default value:
Status	In progress: On Approval: On Reject: On Cancel: On Completed: On
Character encoding	Japanese (Shift-JIS)
Include header row	No

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Export to CSV File

Categories

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Category Names

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

User Rights

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Operational Administrative Privileges

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Proxy Applicant

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Proxy Approver

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.27. Default Values for Multireport

System Administration

General Settings

Item	Default value
Default status of comment permission	Checked (Allow): ON
Permission to use rich text formatting	Allow: ON
Allow the use of anchor links in comments	Allow: ON
Default watchers	Only attendees and notification recipients

Report Form List

Category Details

Item	Default value:
Category Code	ROOT_CATEGORY[1]

[1]: Only "(root)" is applicable.

Adding Report Forms

Item	Default value:
Post comments	Allow comment to be written: on
Fields to use	Attendees: On Participant: On

Adding Items

String (One Line)

Item	Default value:
Input width	20
Maximum number of characters	100
Limits	No Limit
Default value:	Direct input: On User information: User ID
Description	Show as icon: off
Required Field	Required items: Off

Item	Default value:
Characters before or after the input field	not placed

String (Multiple Lines)

Item	Default value:
Size	Digits: 40 Lines: 30
Description	Show as icon: off
Required Field	Required items: Off
Characters before or after the input field	not placed

Menu

Item	Default value:
Menu item	Manually enter
Description	Show as icon: off
Required Field	Required items: Off
Characters before or after the input field	not placed

Radio Button

Item	Default value:
Description	Show as icon: off
Required Field	Required items: Off
Characters before or after the input field	not placed

Check Box

Item	Default value:
Default value:	Off
Description	Show as icon: off
Characters before or after the input field	not placed

Number

Item	Default value:
Input value	No Limit
Number of decimal places	0
The way to show negative numbers	-1234
Description	Show as icon: off
Format	Right-justified: off Show Thousands separator: off
Required Field	Required items: Off
Characters before or after the input field	not placed

Date

Item	Default value:
Default value:	Current date
Description	Show as icon: off
Required Field	Required items: Off

Item	Default value:
Characters before or after the input field	not placed

Time

Item	Default value:
Unit of time	1 minute
Default value:	To the current time
Description	Show as icon: off
Required Field	Required items: Off
Characters before or after the input field	not placed

Attachment

Item	Default value:
Maximum number of files	1
Description	Show as icon: off
Required Field	Required items: Off
Format	Show images with body: off Shrink Image: Off Width: 50 Height: 50
Characters before or after the input field	not placed

Filter List

Adding Filters

Item	Description
Report Form	Specifying a report form: off The form name includes the following Same as: Off
Search Conditions	Combination of conditions: all conditions Item: One item Conditional expression: includes

User Rights Settings

Item	Description
Security model	REVOKE (All users have access except users on list)

Managing Reports

Exporting Reports

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

Import from CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Export to CSV File

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No
Language in which the data is exported	All: OFF Japanese: OFF English: OFF Simplified Chinese: OFF Traditional Chinese: OFF

4.5.28. Default Values for Cybozu Online Service

System Administration

General Settings

Item	Default value:
Individual ID	Sending an individual ID to the Web site.

Service List

Item	Default value:
Route search	Enable: ON
Weather forecast	Enable: ON
Rokuyo	Enable: ON

4.5.29. Default Values for Presence Confirmation

System Administration

General Settings

Item	Default value:
Auto-setting of status	Setting up attendance on log-in: Off Set to out of office on logout: Off
Personal settings	Allow delegate settings: on

Importing Proxies

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting Proxies

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.30. Default Values for Favorites

System Administration

General Settings

Item	Default value:
Favorite Upper Limit	50

4.5.31. Default Values for Notifications

System Administration

View Settings of Notifications Portlet

Item	Default value:
Space Scheduler Messages Bulletin Board Cabinet Phone Messages E-mail Workflow MultiReport	Enable the settings and do not allow users to change them. Show in List

Auto-Delete Settings

Item	Default value:
The start time of the deletion process	23:00

Settings for External Notifications

Adding External Notifications

Item	Default value:
Status	Disabled
External notifications to allow	API: Off E-mail: Off

Notifications Portlet

Default Settings for Display Items

Item	Default value:
All applications	Details: On Name: On Re: On

Default Settings for Numbers to Display Items

Item	Default value:
Space Scheduler Messages Bulletin Board Cabinet Phone Messages E-mail Workflow MultiReport	5

Read Notifications Portlet

Item	Default value:
Default state of Display items	Space name: On Details: On

Item	Default value:
	Name: On Re: On
The initial status of the number of displays	5

Personal Settings

Using External Notifications

Item	Default value:
Stop using external notifications	Do not use external notifications: off

4.5.32. Default Values for KUNAI

System Administration

General Settings

Item	Default value:
Prohibit use of KUNAI prior to version 2.1.0	Prohibit use of KUNAI before version 2.1.0: off

Setting up User Permissions

Item	Default value:
Target	Everyone
Applications allowed to use in KUNAI	Scheduler: On Message: On Workflow: On E-mail: On Address Book: On Space: On Bulletin board: On Multireport: On

Importing User Permissions

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Skip the first row	No

Exporting User Permissions

Item	Default value
Character Encoding	Japanese (Shift-JIS)
Include header row	No

4.5.33. Default Values for Respond

System Administration

General Settings

Item	Default value:
Available on	Scheduler[1]: On Message: On Bulletin board: On

[1]: Available in Garoon version 5.9.0 or later.

Note

- If you disabled Bulletin Board and/or Messages in the version 5.9.0 or earlier, the default values for Scheduler are also disabled (become Off).

4.6. List of Maximum Number of Input Characters

This section describes the number of characters that can be set for each input field.

4.6.1. Input Limits for Customer Information

Confirming Customer Details

Item	Limit value	Remarks
Company name	100 characters	
Name of Corporation	100 characters	
Logo (URL)	255 characters	

4.6.2. Application Input Limits

List of Applications

Editing Application Names

Item	Limit value	Remarks
Application Name: • 日本語 • English • Simplified Chinese • Traditional Chinese Can be displayed in Traditional Chinese.	100 characters	

User Settings

Remote Access Rule

Item	Limit value	Remarks
IP Address [1]	50 characters	
CIDR[1]	Three characters	
Notes [1]	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

[1]: This item is enabled when IP addresses are specified.

4.6.3. Input Limits for Users

Organization/User Settings

Adding Organizations

Item	Limit value	Remarks
Organization Name (Standard)	100 characters	
Organization Name (display name for each language)	100 characters	

Item	Limit value	Remarks
Organization code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Users

Built-in items

Item	Limit value	Remarks
Name (Standard)	100 characters	
English spelling	100 characters	
Login name	100 characters	
password	64 characters	
Confirm Password	64 characters	
Display order	8 characters	You can describe up to eight digits. • Minimum value: 0 • Maximum value: 99999999
Pronunciation	100 characters	
E-mail	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Job title	100 characters	

Item	Limit value	Remarks
Contacts	100 characters	
URL	255 characters	

Custom Items

Item	Limit value	Remarks
Item Type: string (one line)	100 characters	
Item Type: string (multiple lines)	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Item Type: URL	255 characters	
Item Type: Image URL	255 characters	
Item Type: E-mail	100 characters	
Item Type: IP phone	100 characters	
Item Type: password	64 characters	

Role Settings

Adding Roles

Item	Limit value	Remarks
Role name	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

User Information Items

Adding Custom Items

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	

Limitations on Passwords

Item	Limit value	Remarks
Password expiration	Three characters	An integer from 1 to 999 can be specified.
Expiration notifications	Three characters	An integer from 1 to 999 can be specified.

4.6.4. Input Limits for Authentication

Login Authentication

Standard authentication

Item	Limit value	Remarks
Name	100 characters	

Adding a login authentication

The Login authentication format is environment variable authentication.

Item	Limit value	Remarks
Name	100 characters	
Environment Variable Name	100 characters	
Strings starting from this string are excluded in the authentication	100 characters	
Strings before this string are excluded in the authentication	100 characters	

Session Authentication

Standard authentication

Item	Limit value	Remarks
Name	100 characters	

Adding session authentication

The session authentication format is environment variable authentication.

Item	Limit value	Remarks
Name	100 characters	
Environment Variable Name	100 characters	
Prefix	100 characters	
Suffix	100 characters	

Adding session authentication

The session authentication format is open integrated Authentication ver. 2.

Item	Limit value	Remarks
Name	100 characters	
Authentication password	64 characters	
Authentication password (for confirmation)	64 characters	
Publishing domains	100 characters	

Adding session authentication

The session authentication format is open integrated authentication Ver.1 (deprecated).

Item	Limit value	Remarks
Name	100 characters	
Integrated authentication password	64 characters	
Integrated authentication password (for confirmation)	64 characters	
Cookie issuing domain	100 characters	
Cookie issuance path	100 characters	

Authentication Database

Adding authentication databases

The authentication database format is LDAP.

Item	Limit value	Remarks
Name	100 characters	
Server name	100 characters	

Item	Limit value	Remarks
port number	100 characters	
Account name	100 characters	
password	64 characters	
Confirm Password	64 characters	
Search Origin DN	100 characters	
Search Filter	100 characters	
Search Conditions: Login name [1]	100 characters	

[1]: Displayed when the "Set connection conditions" check box is selected.

4.6.5. Input Limits for Single Sign-On

Single Sign-on Settings (System Administration)

Item	Limit value	Remarks
Name	100 characters	
System URL	255 characters	
Items to be GET (individuals): variable name	100 characters	
Items to be GET (individuals): Default	100 characters	If "Manual" is selected as the default value
Items to be GET (System): variable name	100 characters	
Items to be GET (System): Default	100 characters	If "Manual" is selected as the default value

Single Sign-on Settings (Personal Settings)

Item	Limit value	Remarks
Items to be GET (individuals): Default	100 characters	If "Manual" is selected as the default value
POST items (individuals): Default	100 characters	If "Manual" is selected as the default value

4.6.6. Input Limits for Files

MIME Type

Adding MIME Types

Item	Limit value	Remarks
Extension	100 characters	
MIME Type	100 characters	

4.6.7. Input Limit for Screens

Application Menu List

Adding Application Menu

Item	Limit value	Remarks
Title (Standard)	100 characters	
Title (display name for each language)	100 characters	
URL	255 characters	
Icon URL	255 characters	

Web E-mail

Adding Web E-mail

Item	Limit value	Remarks
Web e-mail name	100 characters	
URL	1024 characters	

4.6.8. Calendar Input Limits

Calendar Settings

Add Calendars

Item	Limit value	Remarks
Calendar name	100 characters	
Calendar Code	100 characters	

Adding Events

Item	Limit value	Remarks
Event Details	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Office Settings

Adding Offices

Item	Limit value	Remarks
Office name (standard)	100 characters	
Office name (display name for each language)	100 characters	
Office Code	100 characters	

4.6.9. Input Limits for Licenses

License Management

License Registration

Item	Limit value	Remarks
Customer number	Six characters	
License key	Five characters	Number of input fields: 9

4.6.10. External Server Input Limits

Setting up System Mail Account

Item	Limit value	Remarks
System E-mail Address	100 characters	
Outgoing mail server name (SMTP)	100 characters	
Outgoing port number	100 characters	

Web Proxy Settings

Item	Limit value	Remarks
Proxy server Name	100 characters	
Proxy Server port number	100 characters	
Exception addresses	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

4.6.11. Input Limits for Localization

Locale Settings

Adding Locales

Item	Limit value	Remarks
Locale name (standard)	100 characters	
Locale name (display name for each language)	100 characters	
Locale Code	100 characters	

4.6.12. API Input Limits

Proxy API Settings

Add Proxy API Settings

Item	Limit value	Remarks
Proxy code	100 characters	
URL	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Parameters	4294967295 characters	The limit is the following total number of characters Parameter "key" and "value" Key and value in header Garoon's internal process information
Headers	4294967295 characters	The limit is the following total number of characters Parameter "key" and "value" Key and value in header Garoon's internal process information

4.6.13. Customization Input Limits

JavaScript and CSS Customization

Adding Customization Group

Item	Limit value	Remarks
Name	100 characters	
JavaScript customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
CSS customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

4.6.14. Input Limits for Personal Settings

Users

Changing Your Password

Item	Limit value	Remarks
New password	64 characters	
New Password for confirmation	64 characters	

User Details

Item	Limit value	Remarks
Name	100 characters	
Pronunciation	100 characters	
E-mail	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Job title	100 characters	
Contacts	100 characters	
URL	255 characters	

4.6.15. Portal Input Limits

System Administration

Portal List

Item	Limit value	Remarks
Portal Name (Standard)	100 characters	
Portal Name (display name for each language)	100 characters	

Portlet Groups

Item	Limit value	Remarks
Group name (Standard)	100 characters	
Group name (display name for each language)	100 characters	

HTML Portlets

Item	Limit value	Remarks
Portlet name (Standard)	100 characters	
Portlet Name (display name for each language)	100 characters	
Portlet Details	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

PHP Portlets

Item	Limit value	Remarks
Portlet name (Standard)	100 characters	
Portlet Name (display name for each language)	100 characters	
Portlet Details	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Personal Settings

My Portal list

Item	Limit value	Remarks
My Portal Name	100 characters	

My Portlet Groups

Item	Limit value	Remarks
Name of Group	100 characters	

HTML Portlets

Item	Limit value	Remarks
Portlet	100 characters	
Portlet Details	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

4.6.16. Portlet Input Limits

Notices Portlet

Item	Limit value	Remarks
Portlet Details	65000 characters	Up to 65000 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

4.6.17. Space Input Limits

System Administration

General Settings

Item	Limit value	Remarks
Default value for expiration date	Five characters	This item is displayed when the expiration date is selected.

Setting Categories

Adding Categories

Item	Limit value	Remarks
Title (Standard)	100 characters	
Title (display name for each language)	100 characters	
Category Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Screens

Creating Spaces

Item	Limit value	Remarks
Space Name (Standard)	100 characters	
Space name (display name for each language)	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

Adding Discussions

Item	Limit value	Remarks
Subject	100 characters	
Body	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Shared To-Dos

Item	Limit value	Remarks
To-Do	100 characters	
Contents	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Searching Spaces

Item	Limit value	Remarks
Search string	100 characters	

4.6.18. Input Limits for Bookmarks

System Administration

Shared Bookmarks

Adding Shared Bookmarks

Item	Limit value	Remarks
Subject	100 characters	
URL	255 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Shared Categories

Item	Limit value	Remarks
Title (Standard)	100 characters	
Title (display name for each language)	100 characters	

Item	Limit value	Remarks
Category Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Screens

Personal Bookmarks

Adding Link

Item	Limit value	Remarks
Subject	100 characters	
URL	255 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Categories

Item	Limit value	Remarks
Subject	100 characters	
Category Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

Search for Bookmarks

Item	Limit value	Remarks
Search string	100 characters	

4.6.19. Scheduler Input Limits

System Administration

Setting Appointment Types

Item	Limit value	Remarks
Appointment type	100 characters	

Appointment Type Links

Adding Appointment Type Links

Item	Limit value	Remarks
Portlet	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

Facilities/Facility Groups

Adding Facilities

Item	Limit value	Remarks
Facility Name (Standard)	100 characters	
Facility Name (display name for each language)	100 characters	
Facility Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Maximum number of users allowed	Three characters	This item is displayed when you use V Cube Meeting connector.

Adding Facility Groups

Item	Limit value	Remarks
Facility Group name (standard)	100 characters	
Facility Group name (display name for each language)	100 characters	
Facility Group Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

Items for Facility Reservation Information

Adding Custom Items

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Menu item	65,535 characters	This item is displayed when the item type is "menu". The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Default settings	100 characters	This item is displayed when the item type is "menu".

Setting up V-CUBE Meeting

Item	Limit value	Remarks
Number of external invitee fields	Three characters	The maximum value is "100".
V-CUBE Meeting URL	255 characters	
Login ID	100 characters	
password	64 characters	

JavaScript and CSS Customization

Adding Customization Group

Item	Limit value	Remarks
Name	100 characters	
JavaScript customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
CSS customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Personal Settings

Setting Appointment Types

Item	Limit value	Remarks
Appointment type	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Forwarding E-mail Notifications for Appointments

Item	Limit value	Remarks
E-mail address to receive notifications (alternate e-mail address)	100 characters	

User Screens

Appointment

Item	Limit value	Remarks
Title (Appointment menu)	100 characters	
Subject	100 characters	
Company Name	100 characters	
Zip code	100 characters	
Address	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Route	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Route (travel time)	100 characters	
Fares	100 characters	
Office Phone Number	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Item	Limit value	Remarks
Comment	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Searching in Scheduler

Item	Limit value	Remarks
Search string	100 characters	

4.6.20. Message Input Limits

System Administration

Searching Messages

Item	Limit value	Remarks
Search string	100 characters	

JavaScript and CSS Customization

Adding Customization Group

Item	Limit value	Remarks
Name	100 characters	
JavaScript customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
CSS customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Personal Settings

Filter Settings

Adding Filter

Item	Limit value	Remarks
Filter Save setting Name	100 characters	
Filter conditions	100 characters	

User Screens

Adding Folders

Item	Limit value	Remarks
Subject	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Messages

Item	Limit value	Remarks
Subject	100 characters	
Body	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
Comment	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Searching Messages

Item	Limit value	Remarks
Search string	100 characters	

4.6.21. Entry Limit for Bulletin Board

System Administration

Adding Categories

Item	Limit value	Remarks
Title (Standard)	100 characters	
Title (display name for each language)	100 characters	
Category Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Screens

Posting Topics

Item	Limit value	Remarks
Manually enter	100 characters	This item is displayed when you enter a sender directly.
Subject	100 characters	
Body	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Topic Details Screen

Item	Limit value	Remarks
Comment	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Searching Topics

Item	Limit value	Remarks
Search string	100 characters	

4.6.22. Input Limit for File Management

System Administration

Adding Folders

Item	Limit value	Remarks
Title (Standard)	100 characters	
Title (display name for each language)	100 characters	
Folder code	100 characters	

Item	Limit value	Remarks
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Screens

Adding Files

Item	Limit value	Remarks
Subject	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Updating Files

Item	Limit value	Remarks
Updated comment	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Search File Administration

Item	Limit value	Remarks
Search string	100 characters	

4.6.23. Input Limits for Memo

User Screens

Adding Memo

Item	Limit value	Remarks
Subject	100 characters	
Contents	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Adding Files

Item	Limit value	Remarks
Subject	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Updating Files

Item	Limit value	Remarks
Updated comment	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Folders

Item	Limit value	Remarks
Subject	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Searching for Memo

Item	Limit value	Remarks
Search string	100 characters	

4.6.24. Input Limits for Phone Messages

Personal Settings

Forwarding E-mail Settings

Item	Limit value	Remarks
E-mail address to receive phone notes	100 characters	

User Screens

Adding Phone Messages

Item	Limit value	Remarks
Client	100 characters	
Telephone number	100 characters	
Message	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Searching for Phone Messages

Item	Limit value	Remarks
Search string	100 characters	

4.6.25. Timesheet Input Limits

System Administration

Timesheet List

Item	Limit value	Remarks
Remarks	100 characters	

User Screens

Correcting the Time

Item	Limit value	Remarks
Remarks	100 characters	

4.6.26. Input Limits for To-Do List

Personal Settings

Adding Categories

Item	Limit value	Remarks
Category names	255 characters	

User Screens

Adding To-Dos

Item	Limit value	Remarks
To-Do	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

4.6.27. Address Book Input Limit

System Administration

Book List

Item	Limit value	Remarks
Book name (Standard)	100 characters	
Book name (display name for each language)	100 characters	
Book Code	100 characters	

Item Settings

Custom Items

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Item Type: string (one line)	100 characters	
Item Type: string (multiple lines)	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Item Type: URL	255 characters	
Item Type: Image URL	255 characters	
Item Type: E-mail	100 characters	
Item Type: IP phone	100 characters	

User Screens

Adding Addresses

Item	Limit value	Remarks
Personal Name: Surname	100 characters	
Name of individual	100 characters	
Pronunciation: Last Name	100 characters	
Pronunciation: Name	100 characters	
Company Name	255 characters	
Company Name (pronunciation)	100 characters	
Division Name	100 characters	
Name	100 characters	
Zip code	100 characters	
Address	4,096 characters	
Route	100 characters	
Route: Travel time	100 characters	
Route: Fares	100 characters	
Office Phone Number	100 characters	
Company FAX Number	100 characters	
URL	100 characters	
Job Title	100 characters	
Personal Phone Number	100 characters	
E-mail	100 characters	

Item	Limit value	Remarks
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding My Address Groups

Item	Limit value	Remarks
My address group name	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Searching Address Books

Item	Limit value	Remarks
Search string	100 characters	

4.6.28. E-mail Input Limits

System Administration

Setting up E-Mail Servers

Item	Limit value	Remarks
Mail server code	100 characters	
Name of mail server	100 characters	
Outgoing mail server name (SMTP)	100 characters	
Outgoing port number	100 characters	
Incoming mail server	100 characters	
Incoming port number	100 characters	

User Accounts

Item	Limit value	Remarks
User account code	100 characters	
User account Name	100 characters	
E-mail	100 characters	
Incoming e-mail account name	100 characters	
Incoming e-mail password	64 characters	
Outgoing e-mail account name	100 characters	
Outgoing e-mail password	64 characters	
Search string	100 characters	

E-mail Size

Item	Limit value	Remarks
Total size of e-mails that one user can save	Six characters	When you select "(Specify upper Limit)", set

OAuth Client Settings

Item	Limit value	Remarks
Display name of OAuth client	100 characters	
Client ID	100 characters	
Client secret	200 characters	

JavaScript and CSS Customization

JavaScript and CSS Customization function is available in Garoon version 5.5.0 or later.

Adding Customization Group

Item	Limit value	Remarks
Name	100 characters	
JavaScript customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
CSS customization (Add link)	512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Personal Settings

E-mail Account Settings

Item	Limit value	Remarks
E-mail account name	100 characters	
E-mail	100 characters	
Incoming e-mail account name	100 characters	
Incoming e-mail password	64 characters	
Outgoing e-mail account name	100 characters	
Outgoing e-mail password	64 characters	

Signature Settings

Item	Limit value	Remarks
Name	100 characters	
Contents	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Sender Information Settings

Item	Limit value	Remarks
Name to be represented in the from row	100 characters	

Filter Settings

Item	Limit value	Remarks
Filter Save setting Name	100 characters	
Filter conditions	100 characters	

Automatic Forwarding Settings

Item	Limit value	Remarks
Forwarding Name	100 characters	
Transfer conditions	100 characters	
Forwarding address	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Screens

Compose E-mails

Item	Limit value	Remarks
To	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Cc	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.
Bcc	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Subject	255 characters	
Body	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
Signature	65,535 characters	This field is displayed when the signature has been set in the personal settings. The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Folders

Item	Limit value	Remarks
Subject	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Searching E-mails

Item	Limit value	Remarks
Search string	100 characters	

4.6.29. Workflow Input Limits

System Administration

General Settings

Item	Limit value	Remarks
E-mail notifications permission	Workflow URL: 255 characters	

Request Form List

Adding Categories

Item	Limit value	Remarks
Subject	100 characters	
Category Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Request Forms

Item	Limit value	Remarks
Request Form Name	100 characters	
Request Form Code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Export request data automatically	Export Request Data Directory name: 100 characters	

Changing the Notes for App Administrators

Item	Limit value	Remarks
Notes for Administrators	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Icon Settings

Item	Limit value	Remarks
URL specification	255 characters	

Settings of Request & Approval Number

Item	Limit value	Remarks
Request number format	100 characters	
Approval number format	100 characters	

JavaScript and CSS Customization

Item	Limit value	Remarks
JavaScript customization	Link: 512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.
CSS customization	Link: 512 characters	Up to 512 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

Adding Items

String (One Line)

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Input width	100 characters	
Maximum number of characters	100 characters	
Default value:	Direct input: 100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

String (Multiple Lines)

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Size	Digits: 100 characters Row: 100 characters	Character constraint: Numeric The number of digits and the number of lines is approximate. The actual input value depends on the Web browser and the characters you enter.
Default value:	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Menu

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Menu item	Direct input: 65535 characters Default: 100 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Item	Limit value	Remarks
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Radio Button

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Radio item	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Default value:	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Check Box

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Number

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Limitation on input	Maximum value: 100 characters Minimum value: 100 characters	Input character constraints: numeric
Default value:	100 characters	Input character constraints: numeric
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Auto Calculation

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Calculation details	For constants: 100 characters	Input character constraints: numeric
Characters before or after the input field	100 characters	
To the right	100 characters	

Date

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Attachment

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Format	Width: 0 to 999 Height: 0 to 999	Input character constraints: numeric
Characters before or after the input field	100 characters	
To the right	100 characters	

Route Navigation

Item	Limit value	Remarks
Item name	100 characters	
Item code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	
To the right	100 characters	

Add Items for JavaScript Customization

Item	Limit value	Remarks
Item code	100 characters	

Setting Dedicated Routes

Item	Limit value	Remarks
Route Name	100 characters	
Route code	100 characters	
Route description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Route Steps

Item	Limit value	Remarks
Route Step Name	100 characters	
Step code	100 characters	

Route List

Adding a Shared Route

Item	Limit value	Remarks
Route Name	100 characters	
Route code	100 characters	
Route description	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.

Changing the Notes for App Administrators

Item	Limit value	Remarks
Notes for Administrators	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Route Steps

Item	Limit value	Remarks
Route Step Name	100 characters	
Step code	100 characters	

Managing Request Data

Exporting Request Data

Item	Limit value	Remarks
Number	100 characters	
Subject	100 characters	
Applicant	100 characters	

Personal Settings

Setting Up E-mail Notifications

Item	Limit value	Remarks
E-mail address	100 characters	When "Use e-mail address of user information" is cleared, enter

User Screens

Changing Route Steps

Item	Limit value	Remarks
Comment	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Processing requests

Item	Limit value	Remarks
Comment	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

4.6.30. Multireport Input Limits

System Administration

Report Form List

Adding Categories

Item	Limit value	Remarks
Subject	100 characters	
Category Code	100 characters	
Memo	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Report Forms

Item	Limit value	Remarks
Form name	100 characters	
Report Form Code	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Adding Items

String (One Line)

Item	Limit value	Remarks
Item name	100 characters	
Input width	100 characters	
Maximum number of characters	100 characters	
Default value:	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

String (Multiple Lines)

Item	Limit value	Remarks
Item name	100 characters	
Size: Digits	100 characters	Character constraint: Numeric The number is an approximate value. The maximum number of characters can be entered in one line varies depending on the Web browser and the character you are using.
Size: Row	100 characters	Character constraint: Numeric The number is an approximate value. The maximum number of lines per filed varies depending on the Web browser and the character you are using.
Default value:	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters.

Item	Limit value	Remarks
		The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

Menu

Item	Limit value	Remarks
Item name	100 characters	
Menu item: Direct input	100 characters	
Menu item: Default	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

Radio Button

Item	Limit value	Remarks
Item name	100 characters	
Radio item	100 characters	
Default value:	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Item	Limit value	Remarks
Characters before or after the input field	100 characters	

Check Box

Item	Limit value	Remarks
Item name	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

Number

Item	Limit value	Remarks
Item name	100 characters	
Input value limit: maximum	100 characters	
Input limit: Min.	100 characters	
Default value:	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

Date

Item	Limit value	Remarks
Item name	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

Time

Item	Limit value	Remarks
Item name	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Characters before or after the input field	100 characters	

Attachment

Item	Limit value	Remarks
Item name	100 characters	
Description	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.
Display: Width	Numbers from 0 to 999	
Display height	Numbers from 0 to 999	

Item	Limit value	Remarks
Characters before or after the input field	100 characters	

Filter List

Item	Limit value	Remarks
Filter Name	100 characters	
Search Conditions	100 characters	

4.6.31. Input Limits for Presence Confirmation

System Administration

Status Settings

Item	Limit value	Remarks
Status	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

Personal Settings

Status Settings

Item	Limit value	Remarks
Status	65,535 characters	The maximum number of characters is 65535 with single-byte characters. The maximum number of characters varies depending on the character type.

User Screens

Changing Presence Information

Item	Limit value	Remarks
Memo	100 characters	

4.6.32. Input Limits for Notifications List

System Administration

Settings for External Notifications

Adding External Notifications

Item	Limit value	Remarks
External notification code	60 characters	
Name	60 characters	
Allowed URLS	4294967295 characters	Up to 4294967295 characters can be specified for single-byte characters. The maximum number of characters varies depending on the character type.

4.6.33. Input Limits for Image Assets

System Administration

Adding Image Assets

Item	Limit value	Remarks
File key	128 characters	

Issue date:February 2022