

Operation Manual for proposal approval via Teams

ODC-C

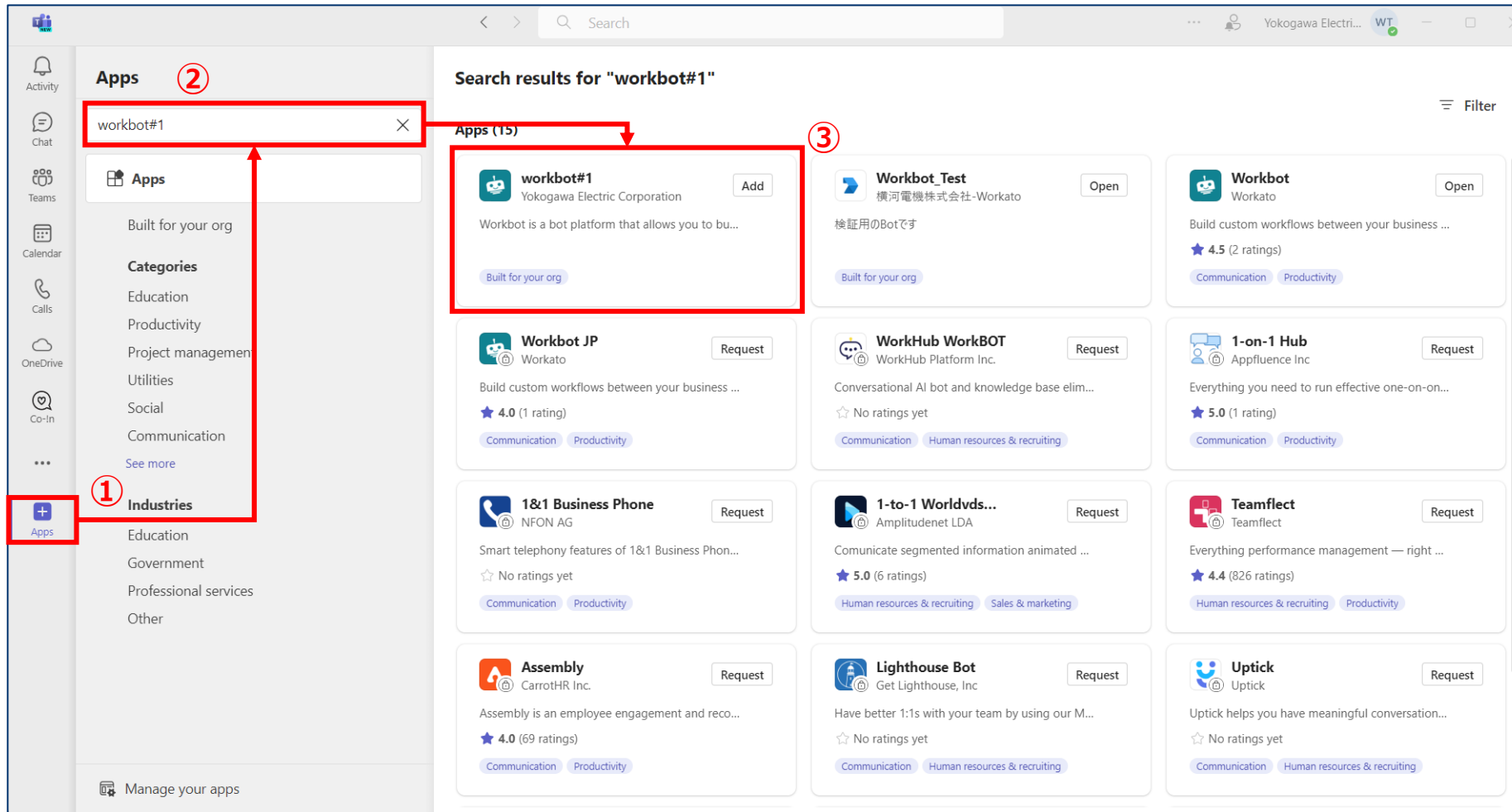
2024/07/31

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2. Start the “workbot#1”
3. Display main menu
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6. Introduction of proposal details information
7. Change “workbot#1” display language

1. Activate the “workbot#1”

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■ ① Open Apps list
Click the “Apps” button in Teams.

■ ② Search “workbot#1”
Enter “workbot#1” in the search box to search.

■ ③ Select “workbot#1”
Click “workbot#1” app in the Apps list.

1. Activate the “workbot#1”



workbot#1

Yokogawa Electric Corporation

Add



Overview Permissions

Workbot is a bot platform that allows you to build customizable workflows.

Eliminate app-hopping. Connect to your critical business applications and bring the power of those services into a single interface.

App features

Bots

Chat with the app to ask questions and find info

Personal app

Keep track of important content and info

Created by: [Yokogawa Electric Corporation](#)

Version 1.0.0

Permissions

This app will have permission to:

- Receive messages and data that I provide to it.
- Send me messages and notifications.
- Access my profile information such as my name, email address, company name and preferred language.
- Receive messages and data that team or chat members provide to it in a channel or chat.

By using workbot#1, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#).

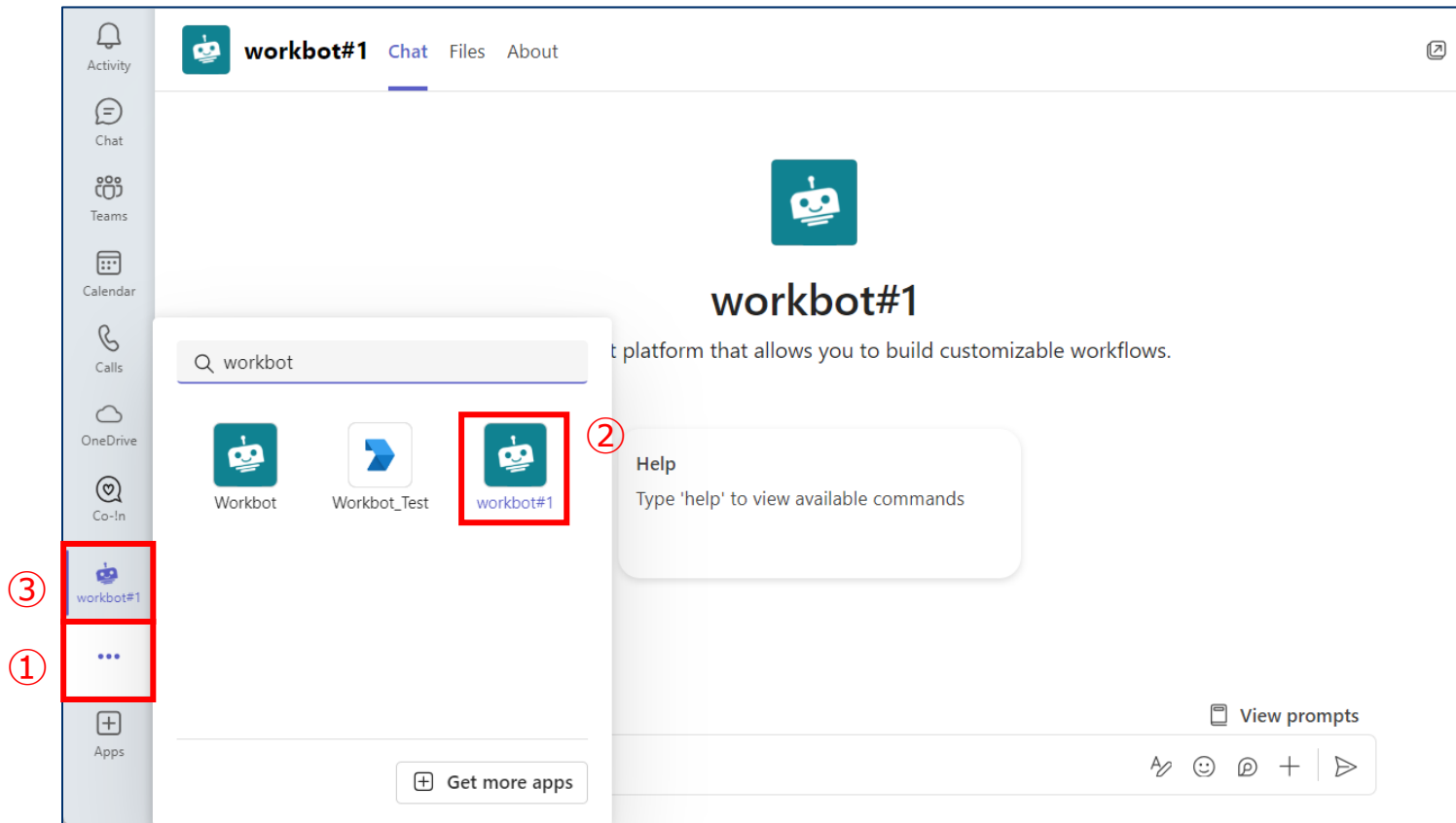
■ ④ Add workbot#1
Click the “Add” button.

2. Start the “workbot#1”

2. Start the “workbot#1”

■ Start the “workbot#1”

- ① Click the “...” menu on side of Teams.
- ② Display the added applications and click on “workbot#1”.
 - After installation, you can call “workbot#1” in the above operation.
- ③ Depending on the space of the side menu, it is placed on the side menu automatically.



3. Display main menu

3. Display main menu

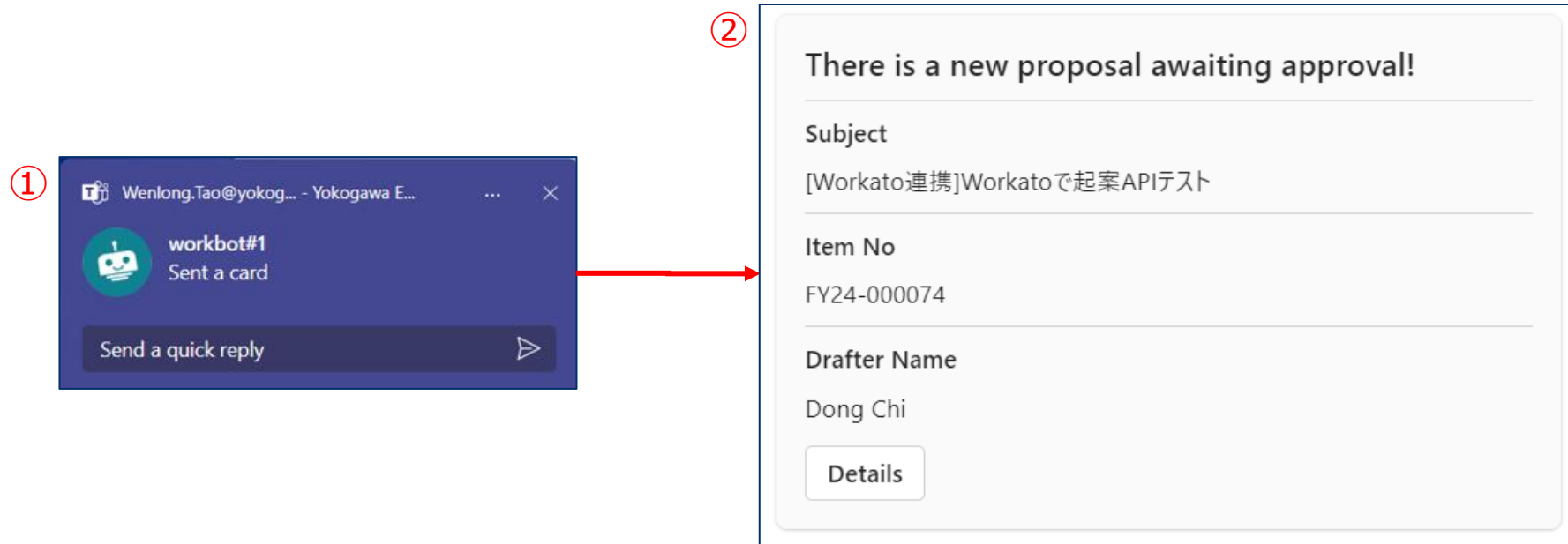
- Display main menu
 - ①Click on the input box in the 'workbot#1' dialog box, as 'help' is automatically displayed, please click on it.
 - ②Once you have entered 'help', please press the enter key or click the send button.
 - ③The main menu appears.

The image shows a screenshot of the Workato interface. On the left, a chat input box contains the text 'help' (marked with a red box and ①). To the right of the input box is a toolbar with icons for attachments, emojis, and a send button (marked with a red box and ②). A red line connects the 'help' text to the send button. On the right, the resulting main menu is displayed (marked with a red box and ③). The menu includes a welcome message, a search bar, and several buttons: 'Search Across Internal Sites', 'Approval Bot', 'Approval Bot - Pending Approvals', 'For administrator', and 'Notify members in a group'.

4. Receive the proposal notification

4. Receive the proposal notification

- When a proposal pending approval is submitted to an approver, the approver's Teams receives the following "There is a new proposal awaiting approval!" message.
 - ① Teams will pop up, please click it.
 - ② Receive awaiting approval information.



4. Receive the proposal notification

There is a new proposal awaiting approval!

Subject

[Workato連携]Workatoで起案APIテスト

Item No

FY24-000074

Drafter Name

Dong Chi

Details

③

③ “Details” button

On “There is a new proposal awaiting approval!” notification message, click on the “Details” button.

④ Display the “Proposal Details Information” screen

Once click on the “Details” button, take you directly to the “Proposal Details Information” screen.

⑤ “Approval” and “Reject” buttons

There are “Approval” and “Reject” buttons on the “Proposal Details Information” screen. For details on the operation of the “Approval” and “Reject” buttons, see [“6. Introduction of proposal details information”](#).

Proposal Details Information

④

Control No

504056

Item No

FY24-000074

Subject

[Workato連携]Workatoで起案APIテスト

Start Date

20240731

Drafter Name

Dong Chi

Drafter Mail Address

Dong.Chi@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

2: Waiting Approval

Receive Date

2024-07-31 15:31:49

Proposal Files

[Proposal.pdf](#)

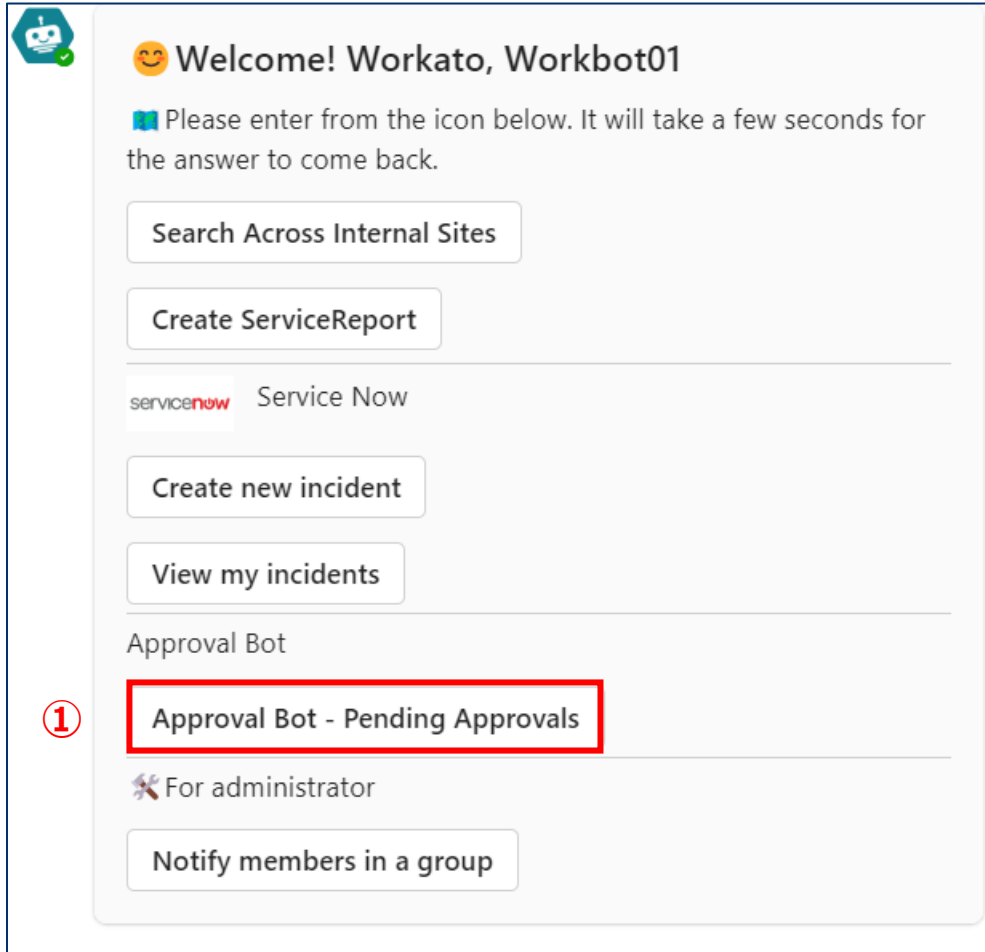
Comment

Approval

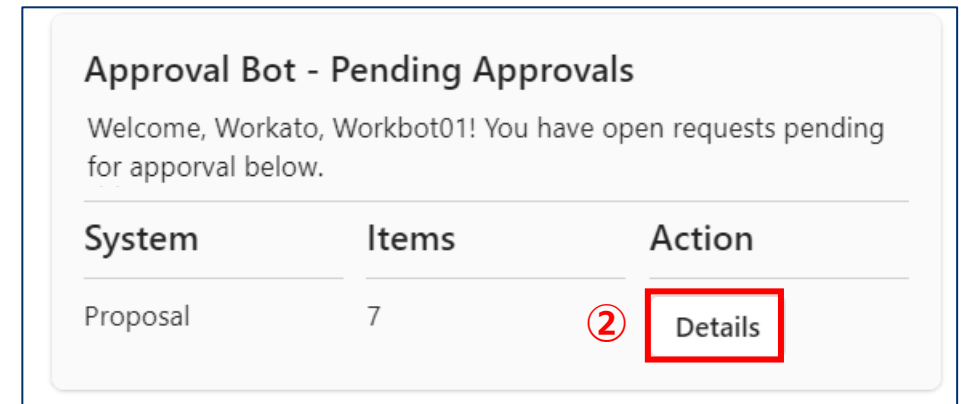
Reject

⑤

5. View pending approvals



- ① Click “Approval Bot - Pending Approvals” button
Click the “Approval Bot - Pending Approvals” button in the main menu, then you can see the below “Approval Bot - Pending Approvals” message.
- ② Click “Details” button
Click on the “Details” button to open requests pending for approval.



5. View pending approvals

■ ③Displayed pending for approval list

Sort by the oldest datetime of receipt of the application for the proposal and display the top 5 proposals.

■ ④Display the “Proposal Details Information” screen

Once click on the “Details” button of pending approval list, take you directly to the “Proposal Details Information” screen.

The screenshot displays the 'View pending approvals' interface. On the left, a list of three pending proposals is shown. The first proposal, 'No.1', is highlighted with a red circle containing the number 3. Below the list, a red box highlights the 'Details' button for the first proposal, with a red circle containing the number 4. A red arrow points from this button to the 'Proposal Details Information' screen on the right.

Proposal List (Left Panel):

- No.1**
Subject: [Workato連携]Workatoで起案APIテスト
Item No: FY24-000074
Receive Date: 2024-07-31 15:31:49
Details (4)
- No.2**
Subject: [Workato連携]Workatoで起案APIテスト_0731_006
Item No: FY24-000073
Receive Date: 2024-07-31 14:33:11
Details
- No.3**
Subject: [Workato連携]Workatoで起案APIテスト_0731_005
Item No: FY24-000072
Receive Date: 2024-07-31 13:53:11
Details

Proposal Details Information (Right Panel):

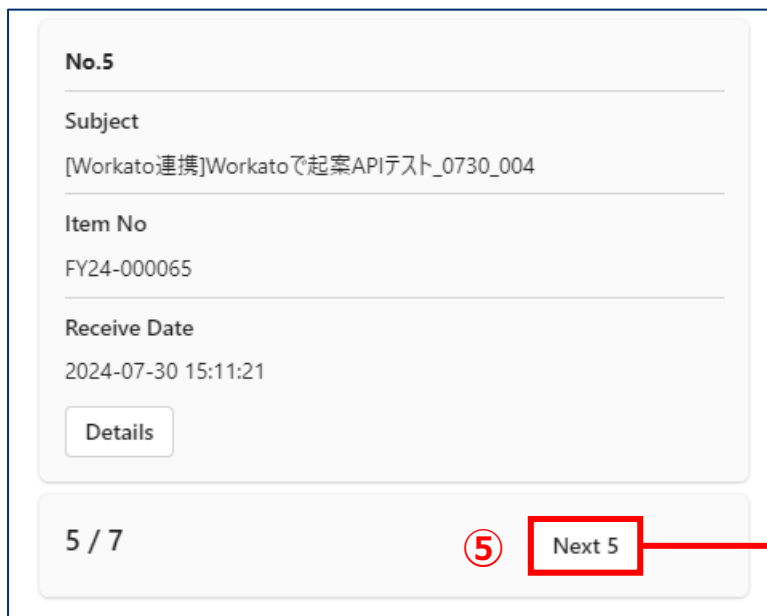
- Control No: 504056
- Item No: FY24-000074
- Subject: [Workato連携]Workatoで起案APIテスト
- Start Date: 20240731
- Drafter Name: Dong Chi
- Drafter Mail Address: Dong.Chi@yokogawa.com
- Organization Name: DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.
- Status: 2: Waiting Approval
- Receive Date: 2024-07-31 15:31:49
- Proposal Files: [Proposal.pdf](#)
- Comment:
- Approval

5. View pending approvals

■ ⑤ Display remaining approval list

If the total number of proposal is greater than the number of the already displayed proposal, there are the “Next 5” button in the statistical message after the proposal list.

Click the “Next 5” button in the statistics message to see the remaining proposal.



No.5

Subject
[Workato連携]Workatoで起案APIテスト_0730_004

Item No
FY24-000065

Receive Date
2024-07-30 15:11:21

[Details](#)

5 / 7

⑤ [Next 5](#)



No.6

Subject
[Workato連携]Workatoで起案APIテスト_0730_003

Item No
FY24-000064

Receive Date
2024-07-30 14:51:54

[Details](#)

No.7

Subject
[Workato連携]Workatoで起案APIテスト_0729_001

Item No
FY24-000062

Receive Date
2024-07-29 09:14:55

[Details](#)

7 / 7

6. Introduction of proposal details information

6. Introduction of proposal details information

Proposal Details Information

Control No

504056

Item No

FY24-000074

Subject

[Workato連携]Workatoで起案APIテスト

Start Date

20240731

Drafter Name

Dong Chi

Drafter Mail Address

Dong.Chi@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

2: Waiting Approval

Receive Date

2024-07-31 15:31:49

Proposal Files

[Proposal.pdf](#)

Comment

Approval

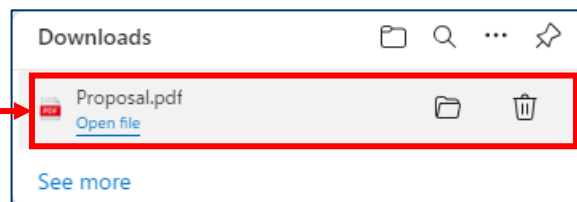
Reject

① Proposal Files

When you click the hyperlink of the proposal files in the “Proposal Detail Information” screen, the file will be downloaded locally.

※Points of Attention

- When the "Proposal Details Information" screen is displayed, the proposal files hyperlink expires in 7 days.
- If the deadline is exceeded, the file cannot be downloaded, so you can download the file by displaying the inbox from the main menu and then reopening the proposal details screen with the same item no.



Proposal

Proposal Number :	FY24-000074		
Approval Type :	Secondary CMU approver:YHQ / CMU直下長	Proposal Type	Proposal / 起案
Proposer :	YHQ デジタル戦略本部 GADMC 戦略システムソリューション部ビジネスシステム課 Dong Chi / 遼 冬(30051552)	Date of Proposal	2024/07/31
Title :	[Workato連携]Workatoで起案APIテスト		
Decision Making Management Code Appendix Table No. & Item :	Test		
Proposal/Report matters :	Test		
Basis for reasonableness and appropriateness of matters for which approval is sought, etc. :	Test		
Budget Code :	1234		
Approver :	YHQ デジタル戦略本部 GADMC 戦略システムソリューション部ビジネスシステム課 Wenlong Tao / 陶 文龍(30055453)	Date of Approval	
Approver's Comment :			
Distribution			
Destination		Distribution Format	
Destination (individual)		Distribution Format	
Attachments :			
Template Name :	Workato連携テスト		
Rejection History :			
Revision History :			

6. Introduction of proposal details information

Proposal Details Information

Control No

504056

Item No

FY24-000074

Subject

[Workato連携]Workatoで起票APIテスト

Start Date

20240731

Drafter Name

Dong Chi

Drafter Mail Address

Dong.Chi@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

2: Waiting Approval

Receive Date

2024-07-31 15:31:49

Proposal Files

[Proposal.pdf](#)

Comment

② Approval

Reject

③

- On the “Proposal Details Information” screen, there are “Approval” and “Reject” buttons.

■ ②“Approval” button

Click the “Approval” button to jump to the next screen for approving the proposal.
In the case of approval, comment can be omitted.

■ ③“Reject” button

Click the “Reject” button to return to the previous screen for rejecting the proposal.
In case of rejection, comment is required.

Comment

△Please enter the reason for reject.

Approval Reject

6. Introduction of proposal details information

Proposal Details Information

Control No

504056

Item No

FY24-000074

Subject

[Workato連携]Workatoで起案APIテスト

Start Date

20240731

Drafter Name

Dong Chi

Drafter Mail Address

Dong.Chi@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

2: Waiting Approval

Receive Date

2024-07-31 15:31:49

Proposal Files

[Proposal.pdf](#)

Do you approve this proposal?

Comment

approval test

④

OK

Cancel

⑤

For approving the proposal, on the “Proposal Details Information” screen, there are “OK” and “Cancel” buttons.

④ “OK” button

Clicking “OK” button means that the proposal will be approved and jump to the next screen.

⑤ “Cancel” button

Clicking “Cancel” button means that the proposal will be canceled and return to the previous screen.

※Points of Attention

- If the proposal has been approved, the hyperlink to the proposal files will no longer be valid because the proposal files has been deleted from file storage in workato.
- If you would like to view the proposal files again after it has been approved, please log in to the Proposal System and view it.

Proposal Details Information

Control No

504056

Item No

FY24-000074

Subject

[Workato連携]Workatoで起案APIテスト

Start Date

20240731

Drafter Name

Dong Chi

Drafter Mail Address

Dong.Chi@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

9: Processed

Release Date

2024-07-31 17:06:22

Proposal Files

[Proposal.pdf](#)

Comment

approval test

i This proposal has been approved.

6. Introduction of proposal details information

Proposal Details Information

Control No

504062

Item No

FY24-000080

Subject

[Workato連携]Workatoで起案APIテスト

Start Date

20240801

Drafter Name

Wenlong Tao

Drafter Mail Address

Wenlong.Tao@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

2: Waiting Approval

Receive Date

2024-08-01 12:45:17

Proposal Files

[Proposal.pdf](#)

Do you reject this proposal?

Comment

reject it.

④

OK

Cancel

⑤

For rejecting the proposal, on the “Proposal Details Information” screen, there are “OK” and “Cancel” buttons.

④ “OK” button

Clicking “OK” button means that the proposal will be reject and jump to the next screen.

⑤ “Cancel” button

Clicking “Cancel” button means that the proposal will be canceled and return to the previous screen.

※Points of Attention

- If the proposal has been rejected, the hyperlink to the proposal files will no longer be valid because the proposal files has been deleted from file storage in workato.
- If you would like to view the proposal files again after it has been rejected, please log in to the Proposal System and view it.

Proposal Details Information

Control No

504062

Item No

FY24-000080

Subject

[Workato連携]Workatoで起案APIテスト

Start Date

20240801

Drafter Name

Wenlong Tao

Drafter Mail Address

Wenlong.Tao@yokogawa.com

Organization Name

DSHQ GADMC Strategic Sys. Solution Dept.Business Syst. Sec.

Status

9: Processed

Release Date

2024-08-01 12:58:08

Proposal Files

[Proposal.pdf](#)

Comment

reject it.

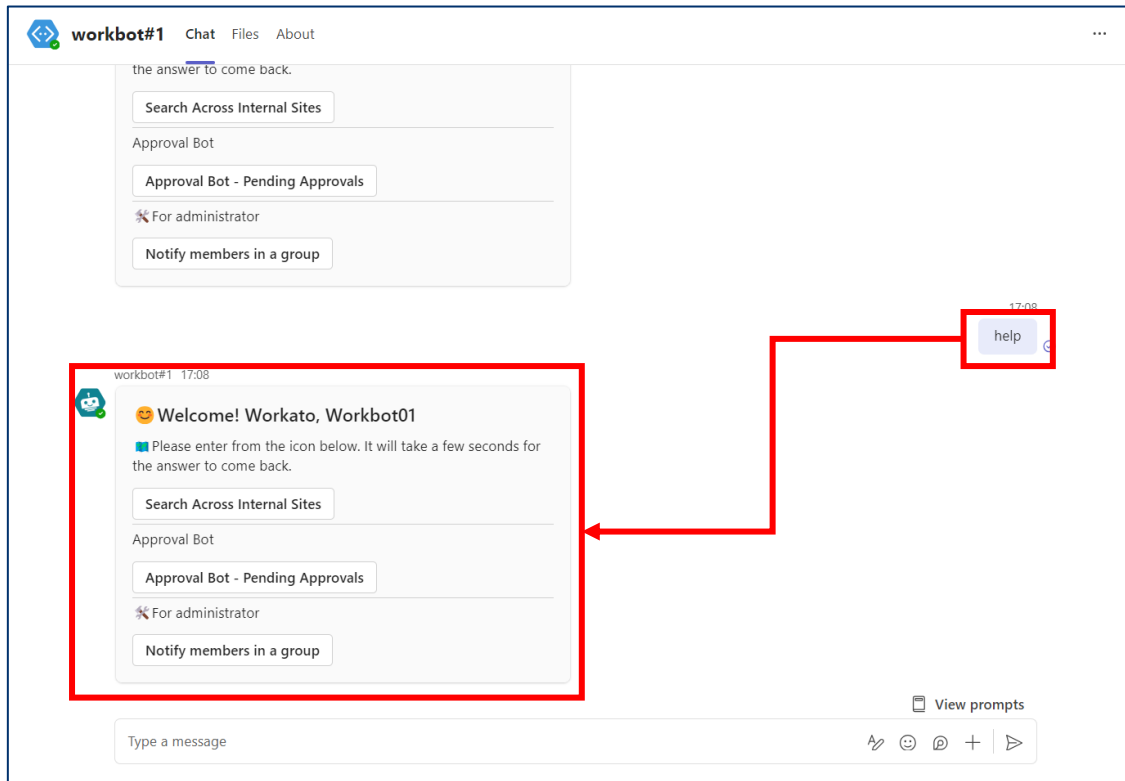
📢 This proposal has been rejected.

7. Change “workbot#1” display language

7. Change “workbot#1” display language

There are two types messages from “workbot#1” .

- 1.The user does something in “workbot#1” then “workbot#1” returns a message.



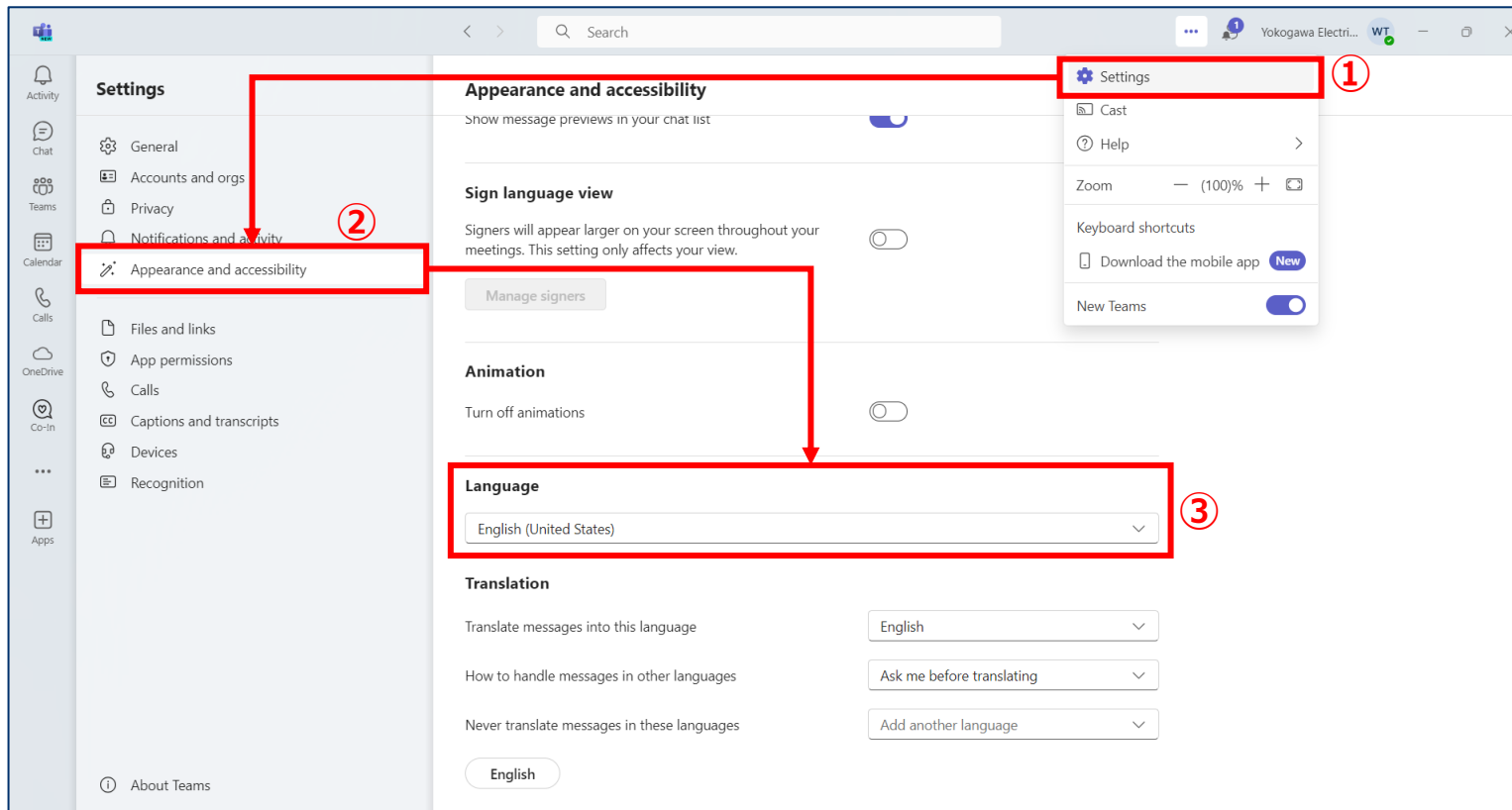
- 2.“Workbot#1” actively notifies the user, and the user receives a message.



7. Change “workbot#1” display language - 1

Type1: The user does something in “workbot#1” then “workbot#1” returns a message.

The display language of this type messages is related to the Teams display language.



If you want to change the team display language, follow the instructions below:

■ ① Open the Teams Settings

Click the “Settings” button of Teams. Then will open the Teams settings screen.

■ ② Click “Appearance and accessibility”

Click “Appearance and accessibility” in the Settings menu.

■ ③ Select the language

Select the language from the “Language” drop-down list. Then the Teams display language will change to the selected language.

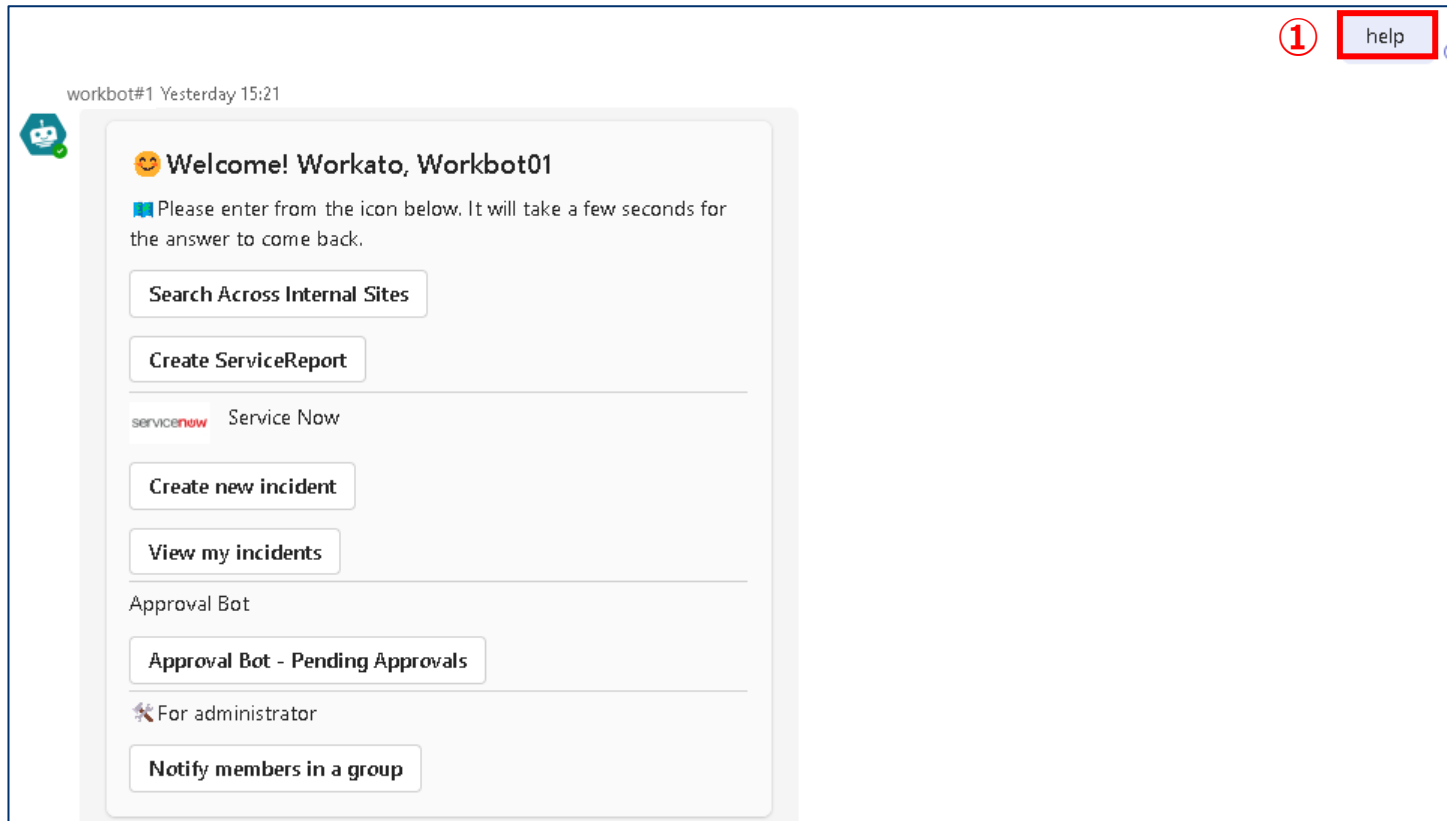
※Points of Attention

- If the display language of Teams is Japanese, the message of "workbot#1" is Japanese.
- If the display language of Teams is not Japanese, the message of “workbot#1” is English.

7. Change “workbot#1” display language - 2

- **Type2: “Workbot#1” actively notifies the user, and the user receives a message.**

The display language of this type messages is only related to the Teams display language when the user sent the “help” command at last time.



- **① Send “help” command**

In the “workbot#1” chat, send the “help” command.

At this point, “workbot#1” will record your Teams display language. When “workbot#1” send you a notification, it will notify the user with this language.

- **※Points of Attention**

- If the display language of Teams is Japanese, the message of “workbot#1” is Japanese.
- If the display language of Teams is not Japanese, the message of “workbot#1” is English.

Co-innovating tomorrow™

Thanks