kintone

Let's use it conveniently basic guidebook

vol. **08**

Permissions

A look at how access rights can be used to restrict viewing and editing, using a case management app as an example!

Solve common problems!

I want to create an app for a specific group of people in the company, but I don't want it to be visible to others. I wonder if there's a way to set permissions to a specific group...
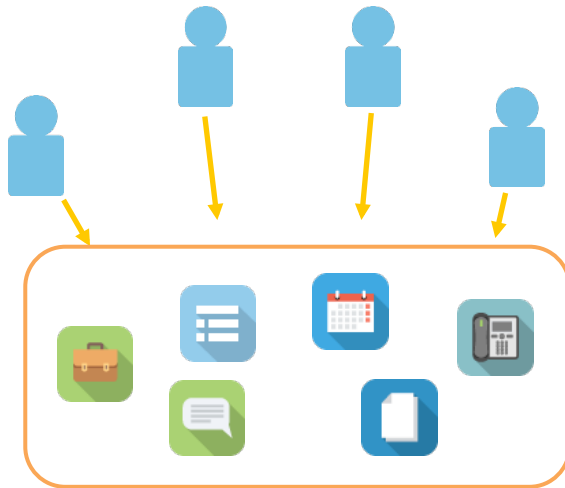
Before Implementing Permissions
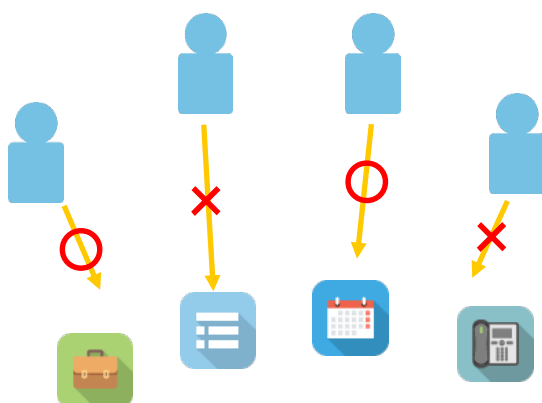
All members can view and edit all apps.

After Implementing Permissions

Permissions can be controlled per app.

For example:

- ・Only allow section members to manage cases (app permissions).

- ・Prevent other employees from seeing your personal information (record permissions).

- ・Prevent non-managers from editing the manager field for daily reports (field permissions).

About App Permissions

By setting permissions for an app, you can control which users and groups can view and edit data. App permissions are split into three stages: App, Record, and Field.

3-Stage Access

Set rights for all records→①App Permissions

Set rights for specific records→②Record Permissions

Set rights for specific fields→③Field Permissions

• ① App Permissions

Allows you to set which users can manage the app and manipulate records (read, add, edit, delete, file load/export). Default settings are as follows.

	View	Add	Edit	Delete	Manage App	Load Files	Write Files
App Creator	○	○	○	○	○	○	○
Everyone	○	○	○	○			

• ② Record Permissions

The view/edit/delete rights for each record in an app can be limited per user. It's also possible to set specific access rights based on the values of a given record's field.

Example: Users can only view records they themselves registered.

Only being able to view records that have been granted "Authorized" status via process management.

- ③ **Field Permissions**

The view/edit rights for each form in an app can be set per user.

Permissions Priority

In kintone, permissions with higher placement on the setting screen take priority.

- **When a Single User Has Multiple Permissions**

When a single user has multiple permissions assigned, the permissions that are located higher on the screen take priority.

In the following example, only Noboru Sato is allowed to view/edit/delete.

	View	Edit	Delete
Noboru Sato	[O]	[O]	[O]
Sales Dept.	[O]	[O]	[ ]
Everyone	[O]	[ ]	[ ]

Higher Settings Take Priority

- **When Different App/Record/Field permissions are Set**

If a restriction is placed on a behavior in either App, Record, or Field settings, that restriction is applied universally to that user.

Example: Noboru Sato

・App permissions – Delete ［×］

・Record permissions – Delete ［O］

→ Record permissions allow deletions, but app permissions prevent them. As such, deletions are restricted across the board.

Once you understand how permissions are split into three-stages of "App", "Record", and "Field", you can mix and match them to easily assign permissions to departments and users!

Setting Permissions

Let's set permissions for a hypothetical case management app.

The process proceeds in three stages: App, Record, and Field.

[Organizational Layout]

Sales		Accounting	PR
Sales Manager　Noboru Sato			
East Area	West Area	Development	HR

Setting App Permissions

Let's set app permissions so that only members of the sales and accounting departments can use the case management app.

[What It Should Look Like When Finished]

- **1. Bring Up the App Permissions Setting Screen**

① Open the app settings screen

Click the gear icon on the app overview screen.

① Click the gear.
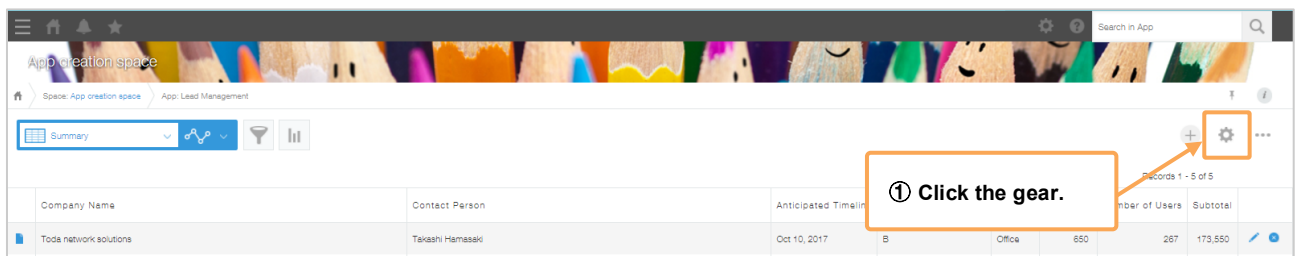
② Open the app permissions setting screen

The app management screen appears. From here, click the "App" button under "Permissions".

② Click "App" under Permissions.
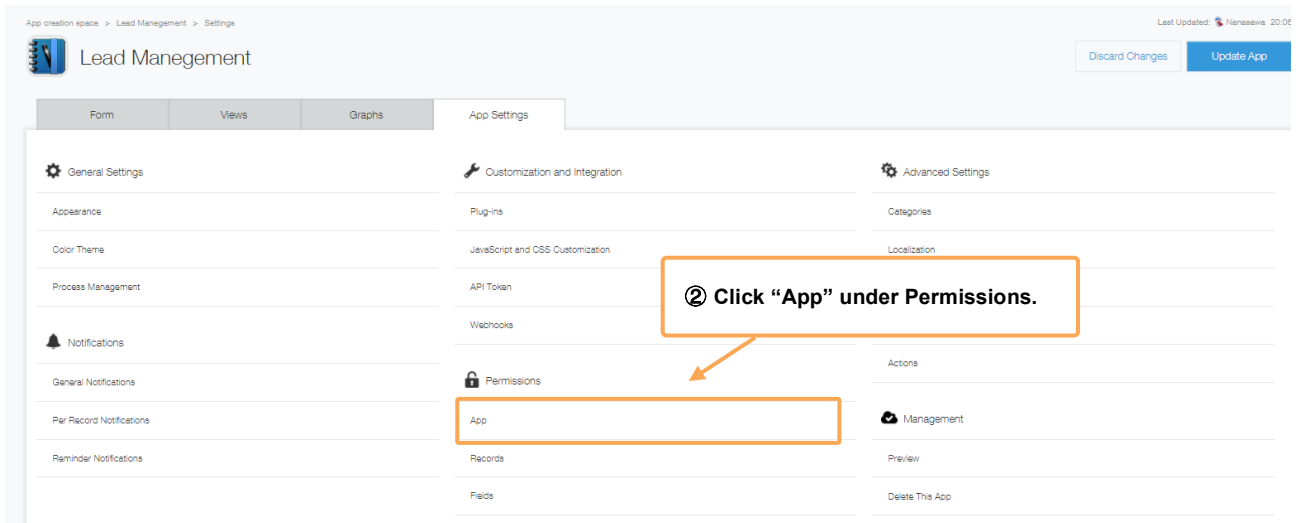
The app Permissions screen appears.
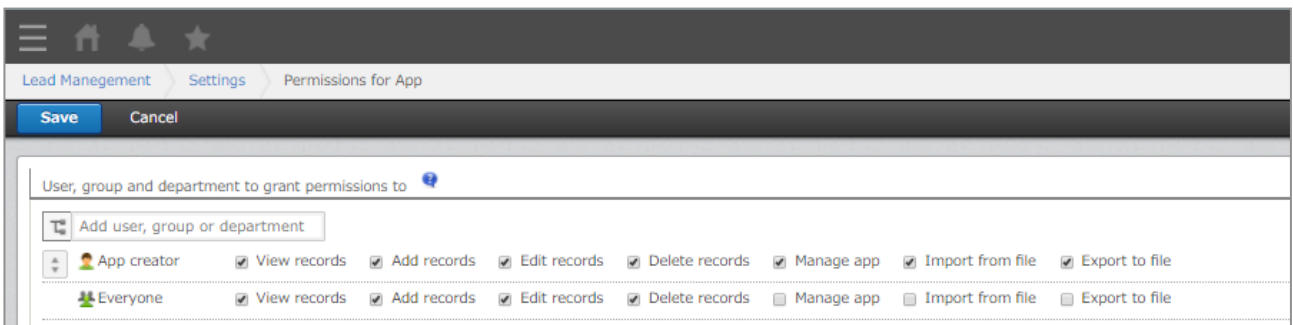
• 2. Setting App Permissions

① Add the Sales Department

Click **"Add user, group or department"** and add Sales (department) and Accounting (department).

① Enter "Sales" and select it.
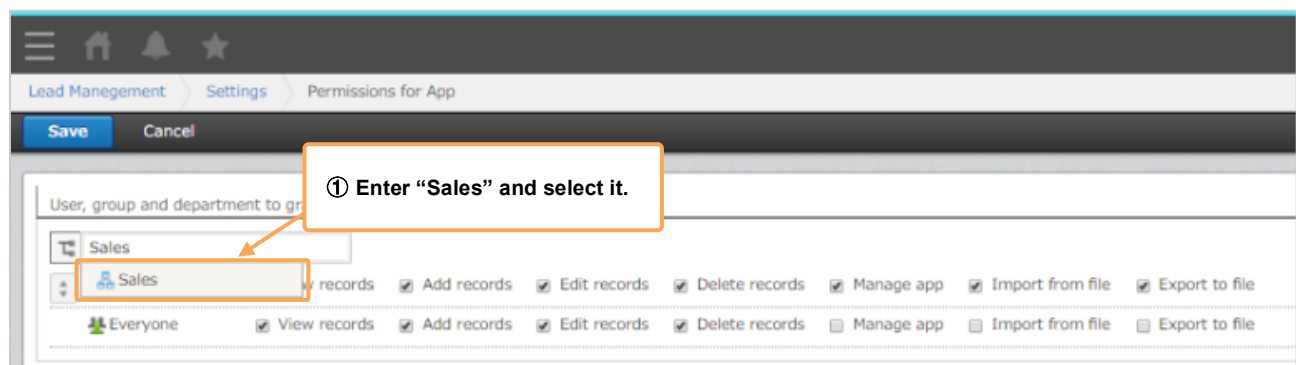
The sales department has been added. Let's add the accounting department in the same way.

② Set permissions for the sales and accounting departments

For the sales department, check "View records," "Add records," "Edit records," "Delete records," and "Permissions inheritance". For the accounting department, check "View records," and "Edit records".

＊"Permission inheritance" : Checking this will apply the same permissions to lower level departments (the East Team and West Team, for example). Leave this box unchecked, and the selected access rights will only apply to the sales department.

＊Permissions toward the top of the settings page take priority.
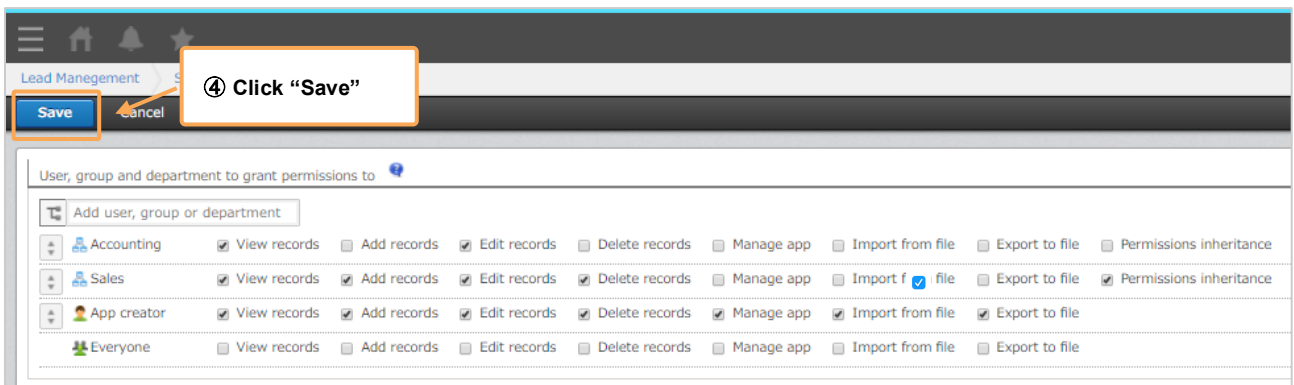

③ Set permissions for Everyone

Let's make this app unusable for everyone outside of the sales and accounting departments. We'll do this by unchecking "View records," "Add records," "Edit records,"
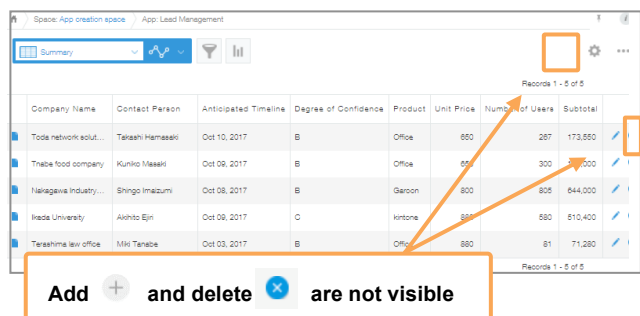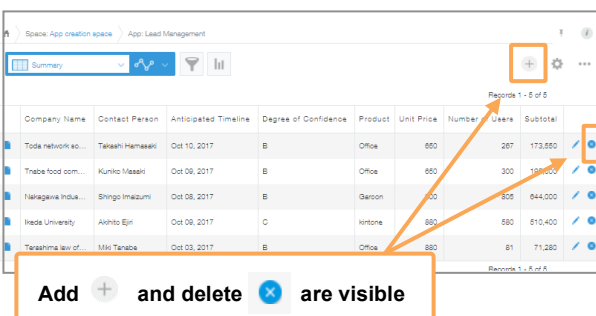
and "Delete records" for Everyone.

③ Uncheck all settings.
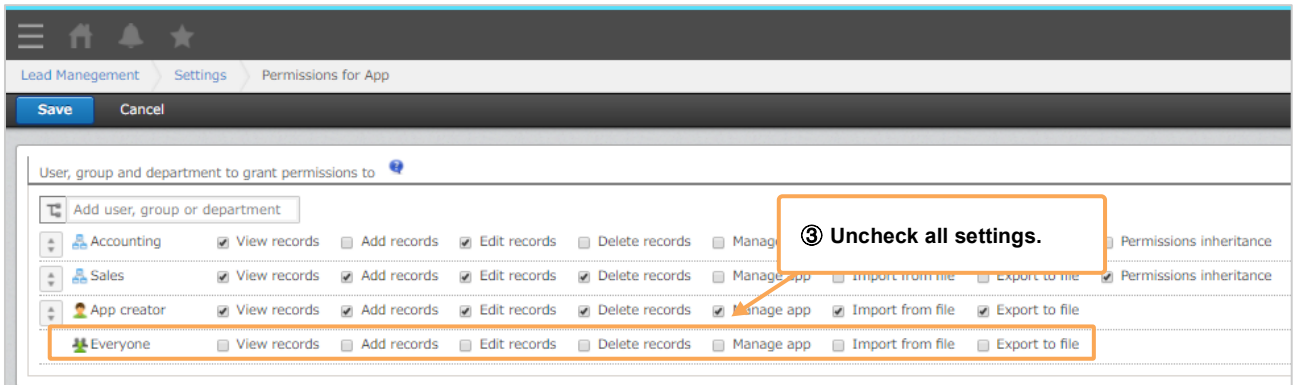
④ Save

Click the "Save" button in the upper left to save changes to permissions.

④ Click "Save"

App permissions are now saved.

[Sales department screen (Add/Delete OK)]   [Accounting department screen (Add× Delete×)]

Add and delete are visible

Add and delete are not visible

＊ The app doesn't display for users without View Record permissions（In this case, users outside of the sales and accounting departments）.
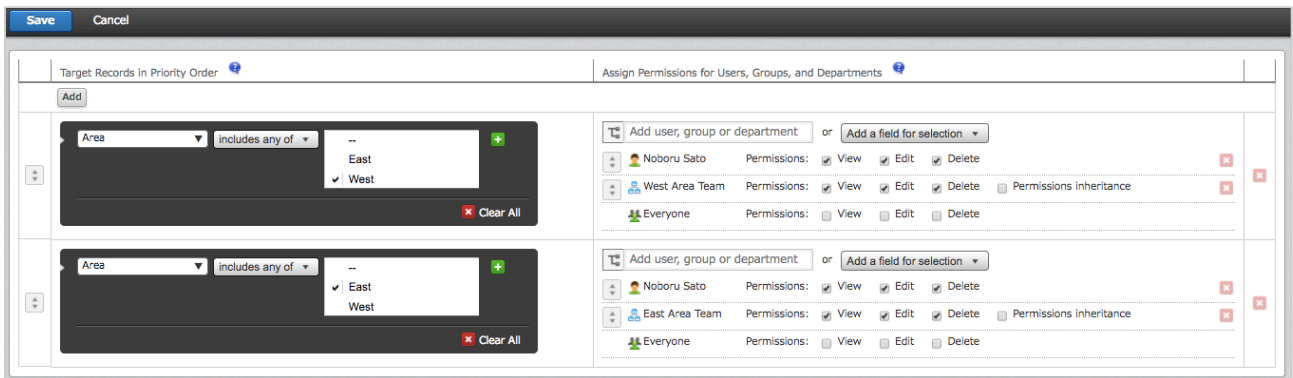
| Setting Record Permissions

Each record registered in the app can have its view/edit/delete permissions restricted on a per-user basis. It's also possible to set specific permissions based on the values of a given record's field.

Let's restrict which member can view which record, based on the case area information assigned to each record (East/West).
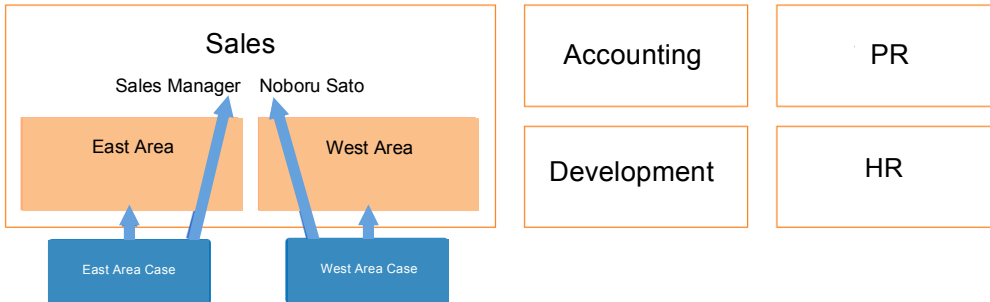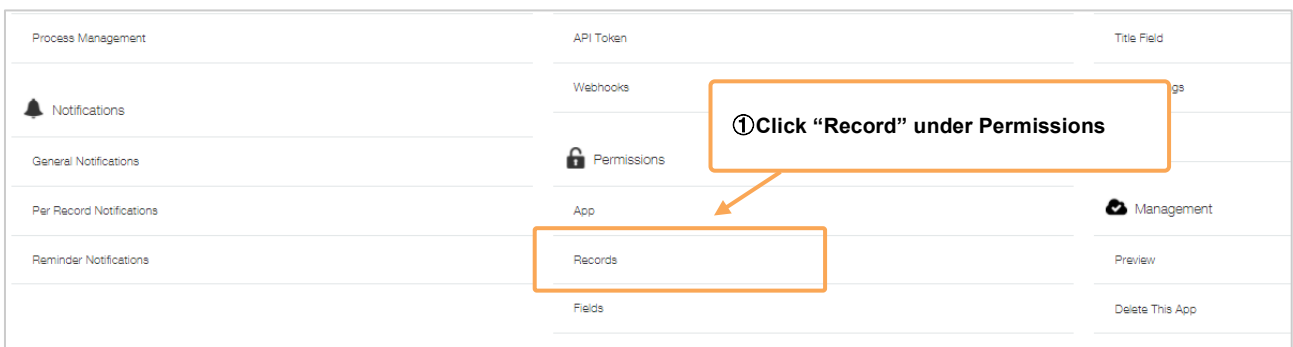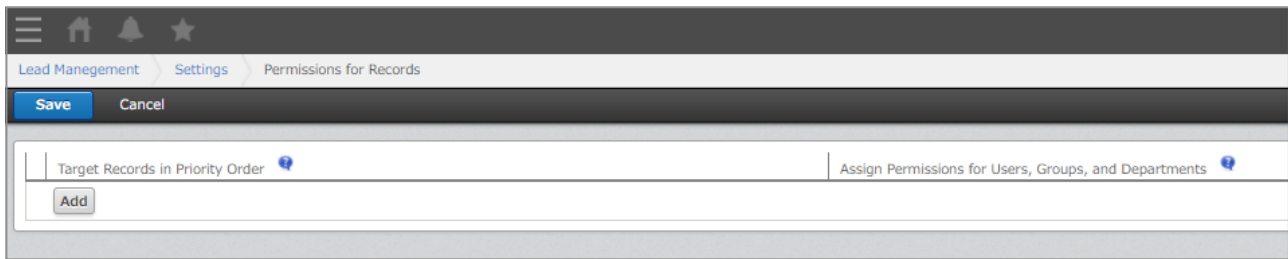

[What It Should Look Like When Finished]

- **1. Bring Up the App Permissions Setting Screen**

① Open the permissions (record) setting screen

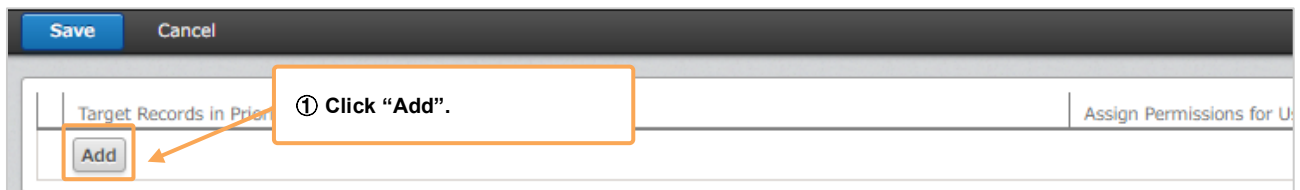Open the app management screen, and click the "Record" button under "Permissions".

The permissions setting screen for records appears.

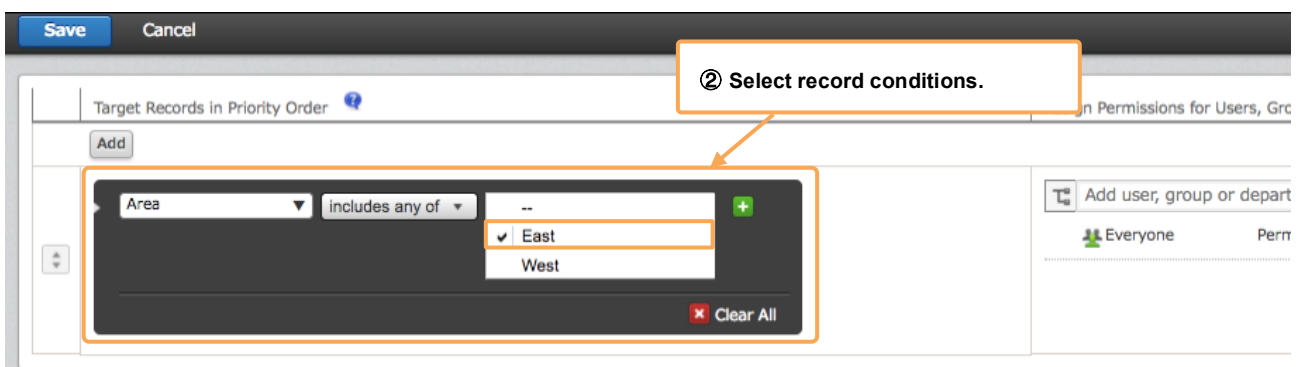## 2. Setting App Permissions

① Add record conditions

Click [Add].

The record condition has been added.


② Set record conditions

Selecting "East" from the "Area" field sets it as a condition. Click "All Records," select the "Area" field, and then select "includes any of" and "East".
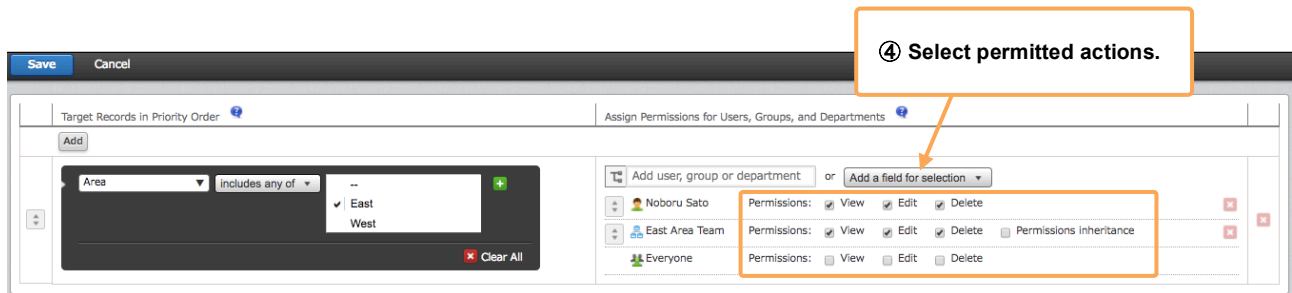
③ Add targets for permissions

Select "East Team" (child department of the sales department) and sales director "Noboru Sato" as the target of permissions.

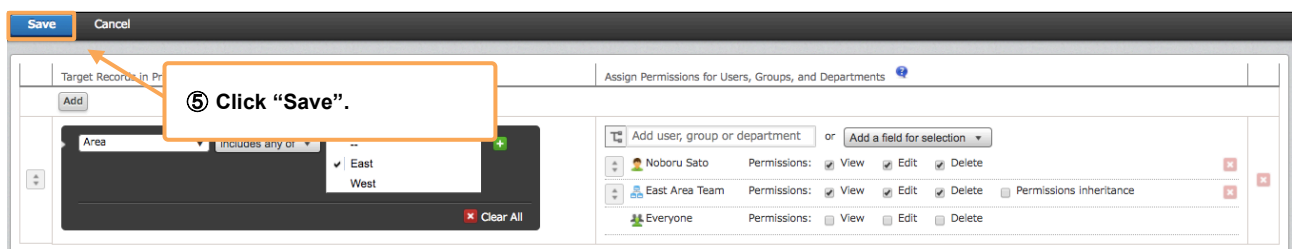Add "East Team" and "Noboru Sato" via [Add user, group or department].

③ Add "Noboru Sato" and "East Area".
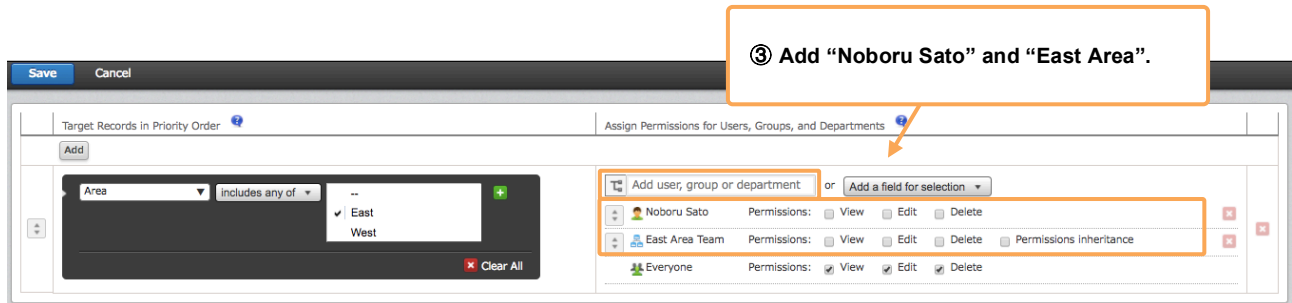
④ Set permissions

Check the "View," "Edit," and "Delete" boxes for "Noboru Sato" of the "East Area". Remove all permissions from "Everyone".

④ Select permitted actions.

⑤ Save

Click the "Save" button in the upper-left corner of the screen.

⑤ Click "Save".

With this, record permissions have been set. In much the same way, let's set it so that only "West Area" and "Noboru Sato" can view/edit/delete when the area is set to "West".

[East Area Screen   East: O   West: ✕]

Only "East" area cases are displayed.

	Company Name	Contact Person	Area	Anticipated Timeline	Degree of confidence	Product	Unit Price	Number of users	Subtotal		
	Toda network solutions	Takashi Hamasaki	East	Oct 10, 2017	B	Office	650	267	173550	✏	✕
	Tanabe food company	Kuniko Masaki	East	Oct 09, 2017	B	Office	650	300	195000	✏	✕
	Tarashima low office	Miki Tanabe	East	Oct 03, 2017	B	Office	880	81	71280	✏	✕

[West Area Screen   East: ✕ West: O]

Only "West" area cases are displayed.

	Company Name	Contact Person	Area	Anticipated Timeline	Degree of confidence	Product	Unit Price	Number of users	Subtotal		
	Tanaka printing company	Misaki Matsuda	West	Oct 11, 2017	B	Office	800	180	144000	✏	✕
	Nakagawa industry company	Shingo Imasumi	West	Oct 08, 2017	B	Garoon	800	805	644000	✏	✕
	Ikeda University	Akihito Ejiri	West	Oct 09, 2017	C	kintone	880	580	510400	✏	✕

[Sales Manager Noboru Sato's screen   East: O   West: O]

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Cases from both the "East" and "West" areas are displayed.

	Company Name	Contact Person	Area	Anticipated Timeline	Degree of confidence	Product	Unit Price	Number of users	Subtotal	
	Toda network solutions	Takashi Hamasaki	East	Oct 10, 2017	B	Office	650	267	173550	
	Tanabe food company	Kuniko Masaki	East	Oct 09, 2017	B	Office	650	300	195000	
	Nakagawa industry company	Shingo Imasumi	West	Oct 08, 2017	B	Garoon	800	805	644000	
	Ikeda University	Akihito Ejiri	West	Oct 09, 2017	C	kintone	880	580	510400	
	Tarashima low office	Miki Tanabe	East	Oct 03, 2017	B	Office	880	81	71280	

| Setting Field Permissions

Each field in an app form can have its read and edit permissions restricted on a per-user basis. Let's set the "Accounting confirmation" field (checkbox) so that only members of the accounting department can edit it.

[How It Should Look]

- **1. Bring Up the Field Permissions Setting Screen**
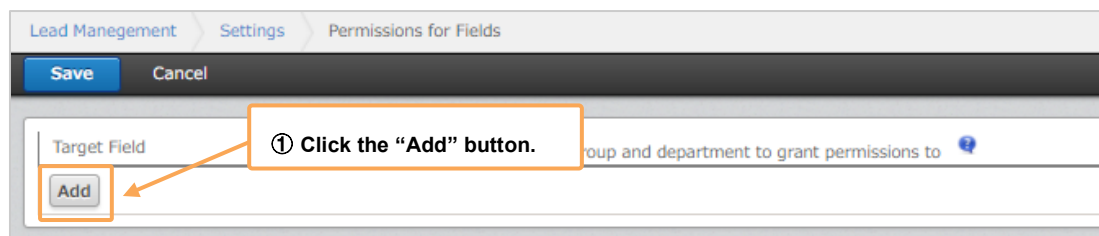① Open the permissions (field) setting screen, and click the "Field" button under "Permissions".

The field permissions setting screen is displayed.

• 2. Set Field Permissions
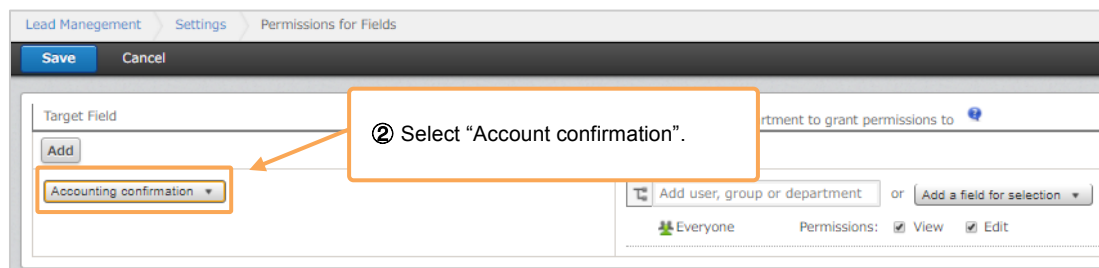
① Add a field

Let's add a field to set permissions to. First, click "Add".

① Click the "Add" button.
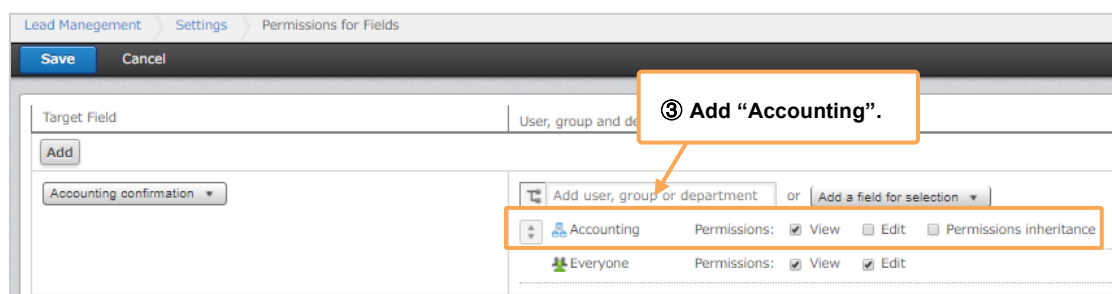
② Select a field to set permissions to

Here, let's select the "Account Confirmation".

② Select "Account confirmation".

③ Set target for permissions

Select "Accounting" department as the target for permissions. Click "Add user, group or department " and add "Accounting" department.

③ Add "Accounting".

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④ Set permissions

Let's set the accounting department to be able to view/edit and other members to only be able to view.

Check "View" and "Edit" for the accounting department, and uncheck "Edit" from Everyone.

④Select allowed behaviors.

⑤ Save

Click the "Save" button in the upper-left corner of the screen.

⑤ Click "Save".

Field permissions have been set.

[Accounting User Screen（View:○ Edit:○）]　　　　[User screen outside Accounting（View:○ Edit:×）]

Editing also allowed.　　　　Editing prohibited.

| Applied Tips

- ## Use Field Group

  By grouping fields with the same permissions within a Field Group, it's possible to set permissions for multiple fields at once.

  Example: Setting permissions for a customer data field.

Multiple fields grouped together.

Set permissions for all customer information fields.

• Set Creators, Updaters, and Assignee.

By setting "Creators," "Updaters," and "Assignee" (users in charge of maintaining a process), you can more easily assign permissions. You can select these roles via the "Add a field for selection" dropdown.

・Creator: User who created a record.

・Updater: User who last changed a record.

・Assignee: User currently in charge of managing a given process.

Example: Make only the records you created viewable.

Example: On apps with case management, make records without the "Finish" status unviewable except to Creators, Assignee, and Updaters.

Set "Target Records in Priority Order".

Add "Creator," "Assignee," and "Updater" and set access rights for each.

• Specify User Selection Fields/Department Selection Fields

By specifying the Selectable User selection fields and Department selection fields that appear in an app's forms, you can assign permissions to users/departments selected on individual records. Specify a field via the "Add field to form" dropdown.

Example: Let's set things up so that a case can only be view/edit/delete by the selected user (the user in charge of a case).

Example: This setting makes it so that only the selected department (the department in charge of the case) can view/edit/delete.

You can manage record permissions dynamically by using process management and user/department fields! Give it a shot once you're used to how permissions work!

About App Groups

App Groups allow you to easily manage app permissions for multiple apps. Accessing a given group requires you to be part of the associated App Group.

By setting permissions for an app group, you can cut down on the time required to set permissions for individual apps.

The following app groups have been set up in advance.

＊Creating an app will default it to be part of the "Public" group.

・ **Public**

Apps in the "Public" App Group default to being open to all users.

・ **Private**

Apps in the "Private" App Group are only open to the app's creators.

New App Groups can also be created.

By assigning permissions to an app group, you can permit or forbid the following actions to users, department, and groups.

・Creating apps that are part of the group.

・Managing, using, and deleting apps that are part of the group.

＊**Creating and managing an App Group requires having management permissions for the group.**

＊**Permissions assigned to an App Group supersede permissions assigned to an individual app.**

Using App Groups is really useful for managing permissions to multiple apps! Create an App Group and add apps to it, then you can manage permissions for those apps all in once.

| Creating App Groups
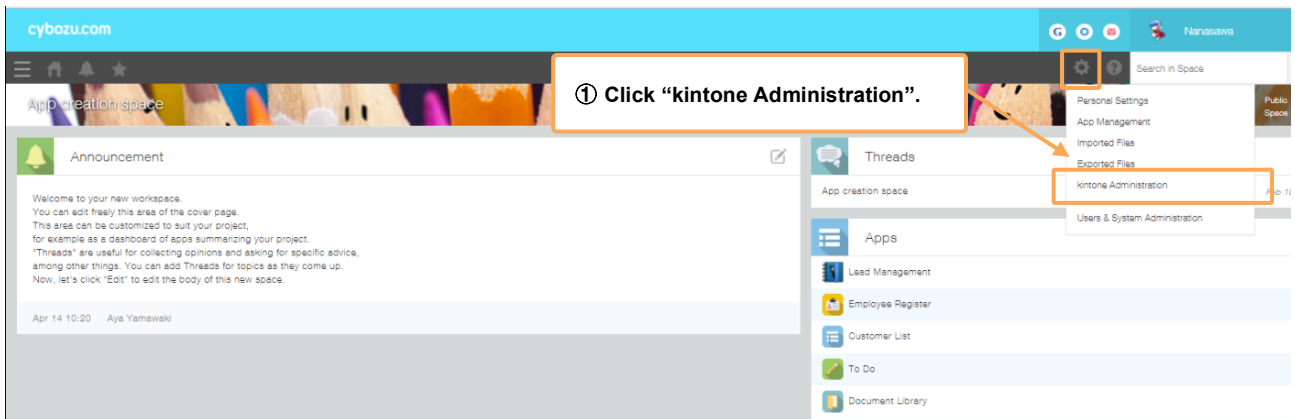
Let's create a new App Group called "Sales" department and set it up so that only members of the sales department can access it.

- **1.Create a New App Group**
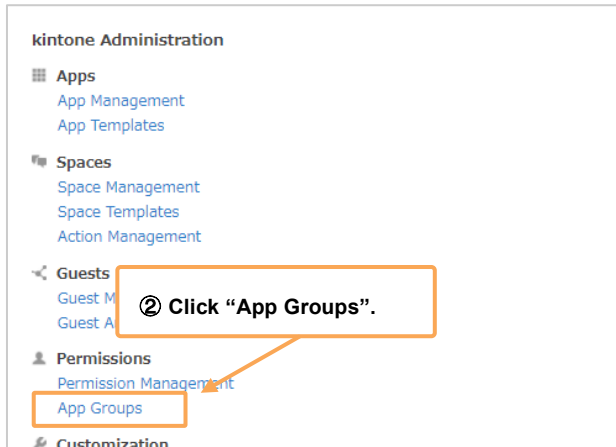
① **Open the kintone system management screen.**

Click the [⚙] icon, then click "kintone Administration".

② Open app groups

Click "App Groups".

③ Create a new app group

Click "New App Group" in the upper-left corner.

④ Enter App Group Name

Enter the name of the App Group.　In this case, it's "Sales" department.

Click the "Save" button in the upper-left corner of the screen.

The "Sales" department App Group has been created.

- **2.Set App Group Permissions**

① Open the permissions setting screen

Click the "Permissions" button for the sales department App Group.

② Set permissions

Set permissions for the App Group.

Let's set things up so that only members of the "Sales" department (lower department inherit permissions) can create, use, and manage the app.

Click "Add," select the "Sales" department, and check the "Apply to affiliated department," "Create apps," and "Manage apps" checkboxes. Also ensure that no boxes are checked for "Everyone".

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② Click "Add" and select "Sales".
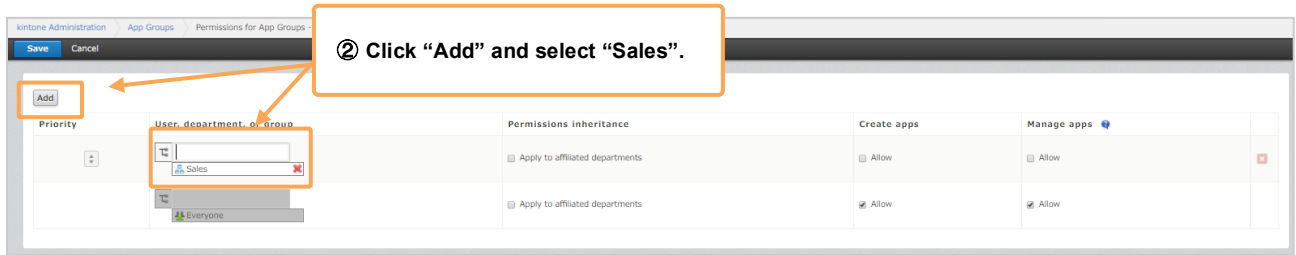
③ Set permissions

Set permissions for the App Group.

Set permissions.
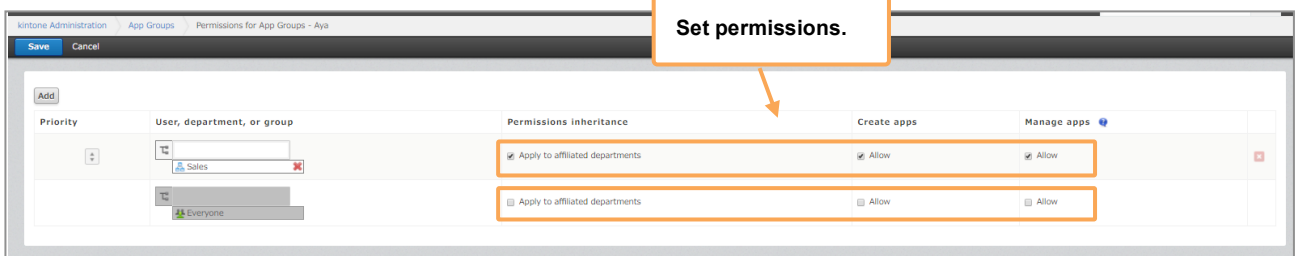
④ Save

Click [Save].

∗ A "Setting saved" message appears.

④ Click "Save".
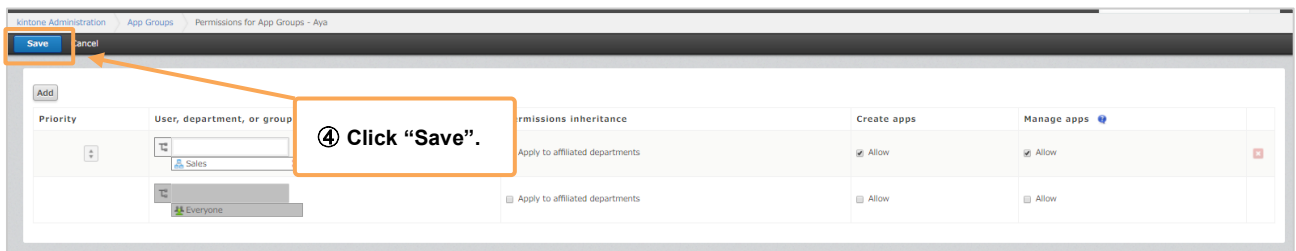
| Let's Set Up an App Group!

Let's set up a newly created App Group.

- **Select App Group**

① Open the App Group selection screen

Click "Appearance" under the "General Settings" heading.

② Select App Group

Select the App Group you want from the "App Group" header.

③ Save

Click the "Save" button in the upper-left corner to save changes to App settings.
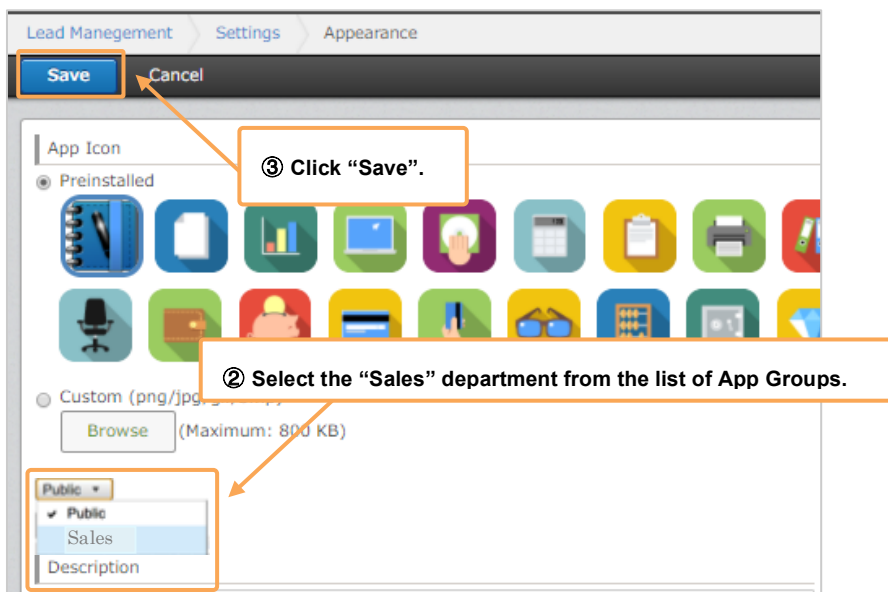
| Useful Tips

- **Changing the default App Group**

  It's possible to change the default App Group that new apps are assigned to on creation.

(Newly created apps are assigned to the "Public" App Group by default.)
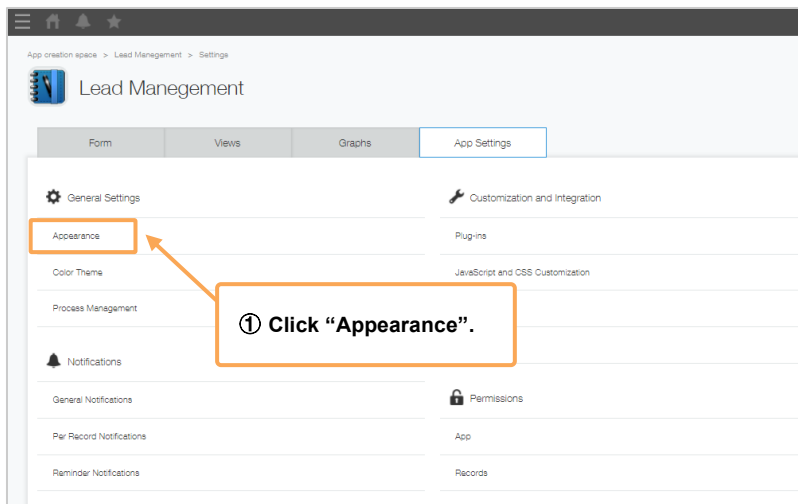
① Select "kintone Administration," then "App Groups".

② Select "Default App Group" in the upper part of the screen, and choose the App Group you want apps to be assigned to by default. Then click the "Save" button in the upper-left corner of the screen to save changes.
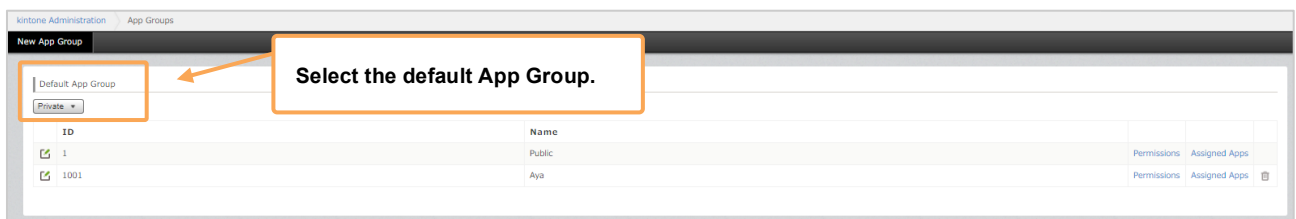
An App Group Example

- ## A "Manager" App Group

  Apps created with kintone are open to all users at the time they're created, but we want to set things up so that the app is initially only usable by managers, and will only become open to all users after verification is completed.

  Permissions for the "Manager" App Group

  Example Group：3 Managers (App Management Team)

User, department or Group	Create apps	Management apps/Use/Deletion
App Management Team	✓	✓
Everyone		

  ＊Save time by creating the department and groups (roles) for the three managers ahead of time.

  ① At App Creation: Select the "Manager" App Group.

  ↓

  ② When App is Verified: Change it to the "Public" App Group.

  Whew, good work! Mixing app permissions and App Groups can help limit access to only the users who need it.