Let's use it conveniently
basic guidebook

vol. 07

Process Management

Here, we will explain the process management function, which can set up approval routes and business process-es (workflow), using the "Equipment purchase request App" as an example!

Solve common problems!

I want to move away from plac-ing requests for purchasing equipment or vacations. If my supervisor is absent, approval takes so much time...
I wonder if there is a better method?

Before Implementing Process Management

Method of requesting the purchase of equipment

・Had to fill out a preexisting **equipment purchasing request form(paper)** and submit

→　Approval takes time

→　If the approver is absent, approval takes time

→　It's unclear where the progress of the approval flow is at

→　It's very troublesome managing the request forms

- **[Request flow up to now]**

⊖Enter a paper request form

⊖Submit to supervisor

⊛Approval

After Implementing Process Management

Equipment purchase request App

・Create an App and set up a **process management**

→ With one click of a button, the flow can move on to the next person

→ Confirmations and approvals can be made outside of the office

→ Progress can be easily checked, such as who is next to approve

→ All request information is stored in the app and is easy to search for

②Approver: Can approve with one click

Equipment purchasing request

| Remand ∨ | Approve ∨ | Change Assignee ∨ |

Status: **Superior currently checking**   Status History

①Applicant: Register request information in the form

Created by	Approver
Yudai Shibutani	Shinichi Sato

Title

Apply for business card purchase in February

Product name	Unit price	Quantity	Subtotal	Summary
Business card (Sales department team A)	1000 YEN	10	10000 YEN	
Business card (Sales department team B)	1000 YEN	8	8000 YEN	

Total amount

18000

How to Set Up Process Management

When using the **"Process Management"** function in kintone, you can set up a process (workflow) for editing and checking   records with multiple users.


- ● **Major uses of process management**

Process management is often used in Apps for "approving requests and managing approval decisions**"** (requests for approval, transportation reimbursement, request PTO application), and Apps that "manage a task involving several users" (work task management, customer support management, etc.).

- ● **Notifications and unprocessed items**

You will receive a notification when requests or work tasks that you are required to handle are registered. If you set up "email notifications," you can also receive notification emails.

Additionally, "unprocessed" work task numbers will be displayed at the top of the portal per App. Because you can always check if there are tasks that you need to handle, you can prevent forgetting them.
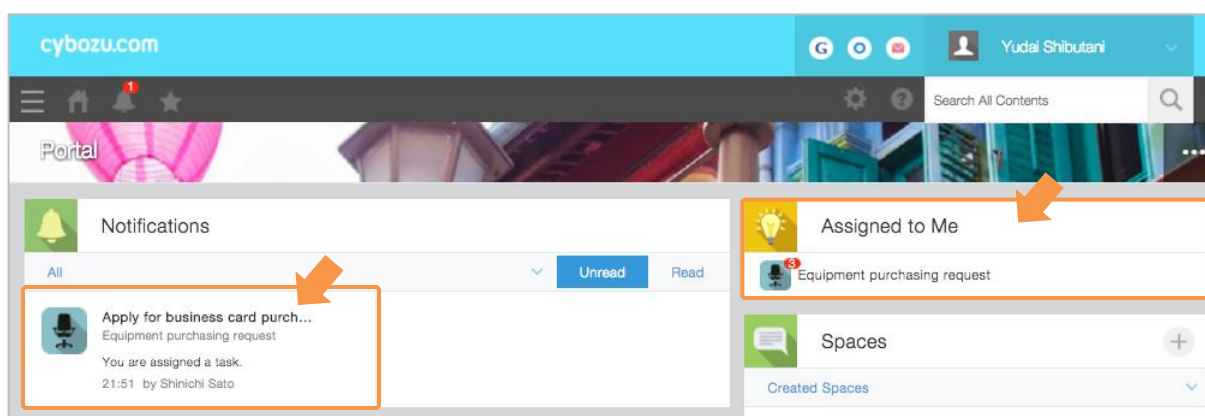
In this example, we will set up process management for an "**Equipment purchase request App**," which is used to approve requests and manage approval decisions.

【Process image】

【Completed image (settings screen)】

1. Preparing process management

Open the settings screen for process management to enable process management.
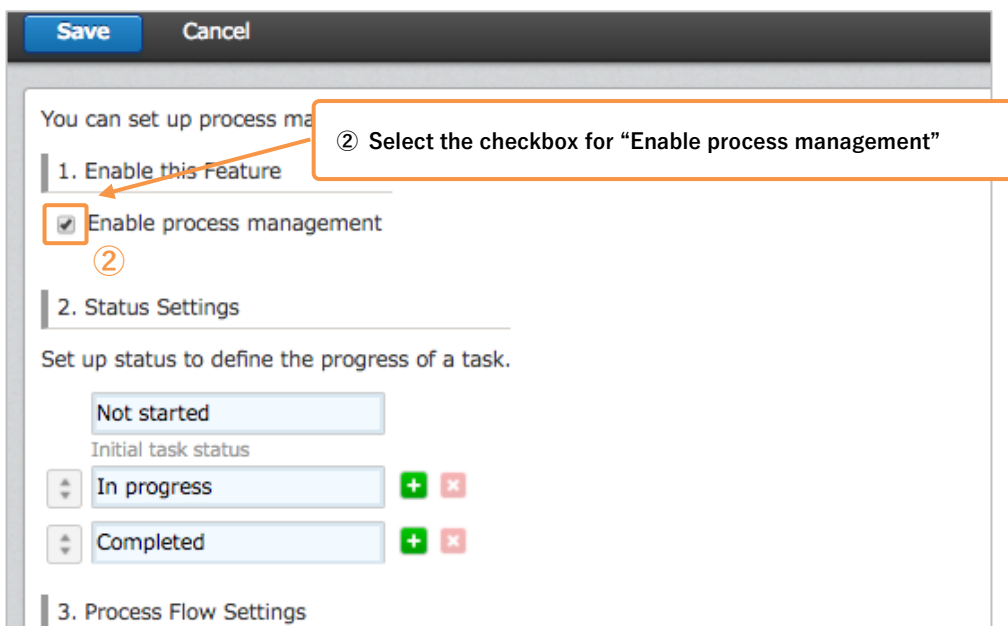
① Open the settings screen for process management

Click "**Process Management**" under "general settings" in the "App settings" tab in the "equipment purchase request App."
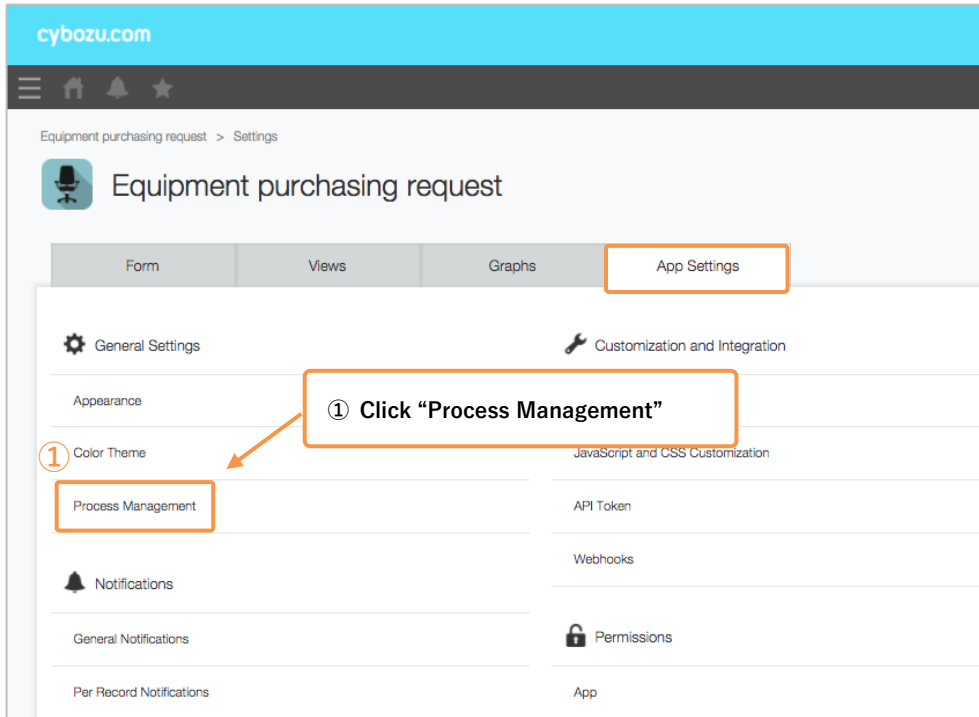
② Enable process management

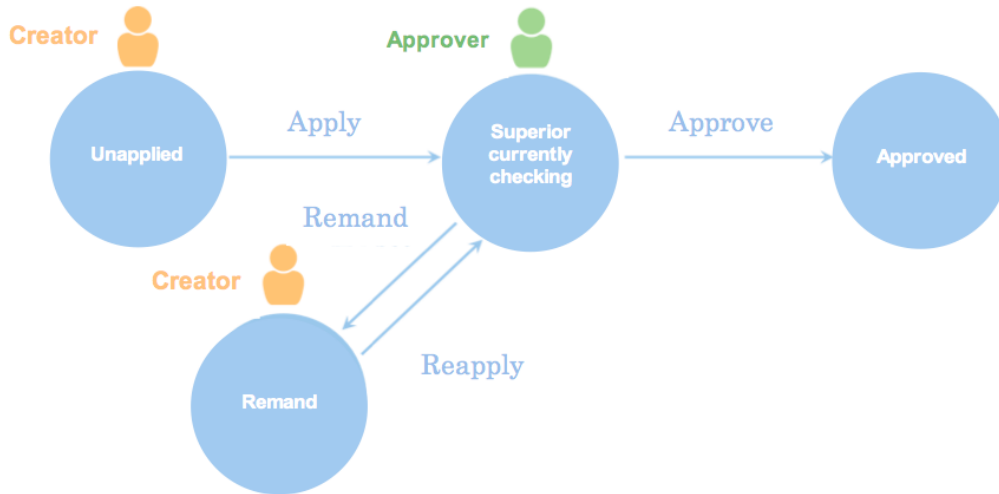In order to use process management, you must enable it beforehand.

Select the checkbox for "**Enable process management**" under "1. Enable."

• 2. Status settings

Status refers to the processing status of records. The current status of each record will be displayed.

Let's register statuses necessary for processes.

【Process image】

① Set up status

Here, we will register statuses for **"Unapplied," "Superior currently checking," "Remand," and "Approved."**

Set up four statuses **"Unapplied," "Superior currently checking," "Remand," and "Approved," under "2. Status."**

※Three statuses, "Not started," "In progress," and "Completed" are set as default.

※By clicking [+] on the right, you can add statuses.

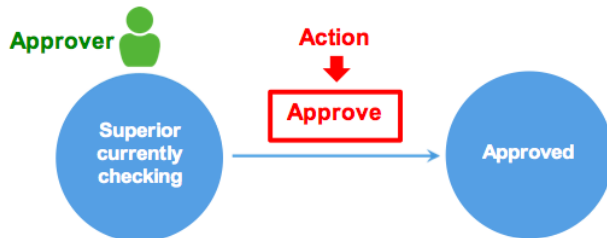## ● 3. Regarding setting processes (Action and Assignee)

Processes can be set with a combination of **statuses before taking action, statuses after action, action name**, and **assignee**.
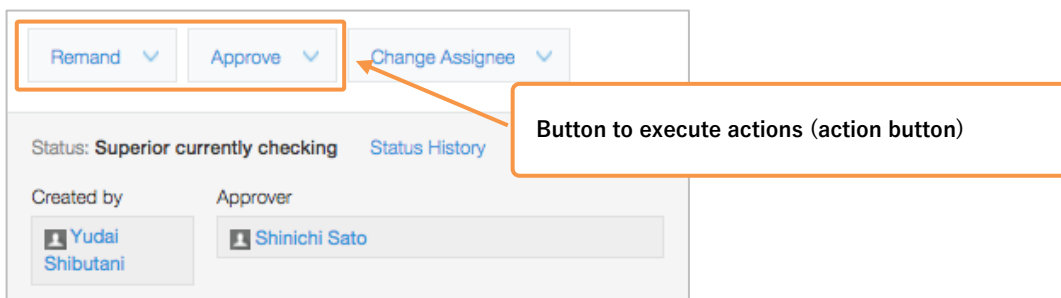
Actions are operations to change the status of records, and can be set per status. (Example: "Superior currently checking" status → Approve → "Approved" status)

When you set an action, a button will appear to execute the action to your record.

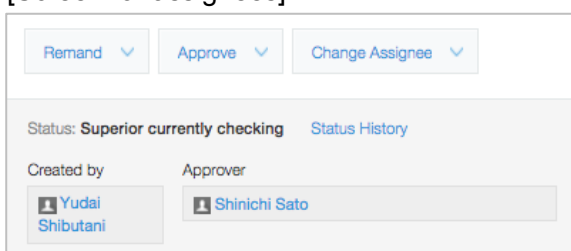The status of records can be changed when a user (assignee) clicks a button.

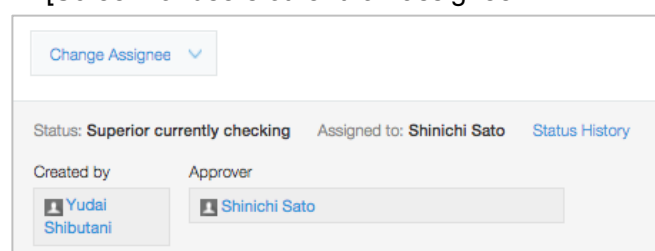You can also set several actions to one status.

Assignees are users that can execute actions. They can also be set per status. The action button will only be displayed on the assignee's screen.

[Screen for assignees]

[Screen for users other than assignee

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4. Set processes per status

From 4-1 to 4-3, we will set processes per status.

[Process completed image (settings screen)]

> This is the most important point of process management!
>
> Let's set "Assignees" and Actions" for each status you registered earlier.

4-1. Set up the process for the "Unapplied" status

We will set up a process for when the creator executes the "apply" action, the status will change to "Superior currently checking."
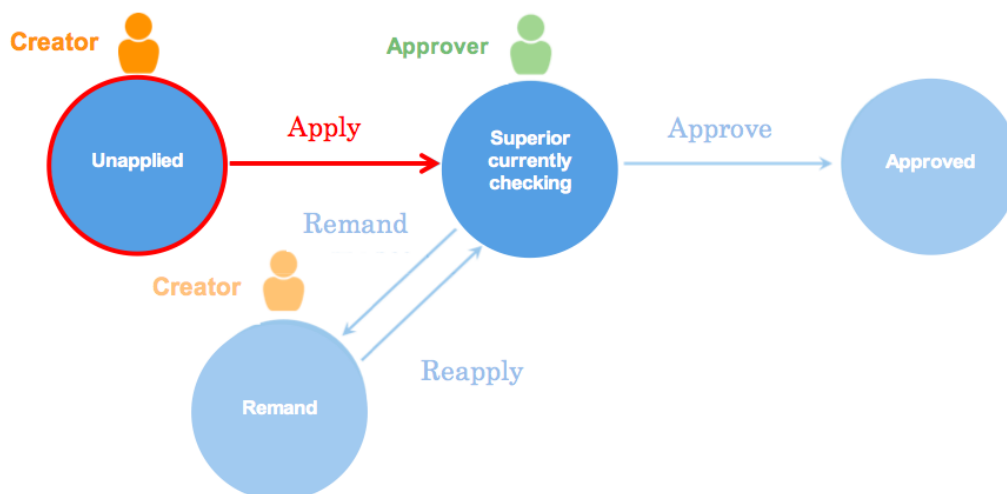
① Set up assignee

Here, we will set up "**Assignees**" who can change the "Unapplied" status. In this example, we will select "**Created by**" (the person who created the record).

② Select status for after executing action

Here, we will select statuses for after executing actions. In this example, we will select **"Superior currently checking."**

③ Set the action name

Set the **action name** for executing actions**.** Here, we will enter "**Apply**."

The set action name will appear on the action button

The process for the status "Unapplied" is complete.

【Actual image of the screen in use (record details screen)】

The "Apply" button will be displayed at the top of the screen

- **4-2. Set the process for the status "Superior currently checking"**

Here, we will set up a process for when the approver executes the "approve" action, the status is changed to **"Approved,"** and when the approver executes the "remand" action, the status is changed to **"remand."**
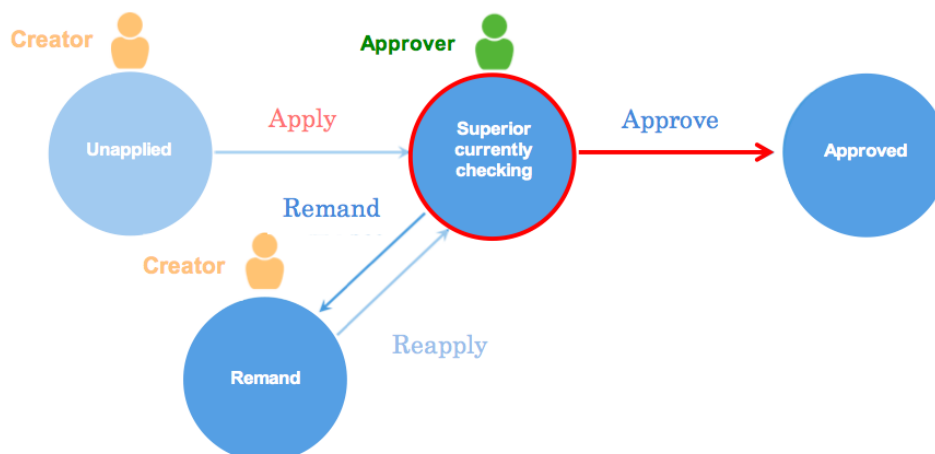
① Set up assignees

Set assignees that can change the "superior currently checking" status. In this example, we will select the **"approver"** (users selected in the "approver" field) under **"select from field."**

② Select status for after executing action

Here, we will create two actions, **"remand" and** "**approve.**"

Click the "+" to add an action. Select "**Remand**" **and** "**Approved**" as statuses for after the action is executed.

③ Add action and set the action name

Set the button for executing an action. Enter "**remand**" and "**approve**" as the action names.

③Enter "Remand" and "Approve" as the action name

The process for the status "Superior currently checking" is complete.

【Actual image of the screen in use (record details screen)】

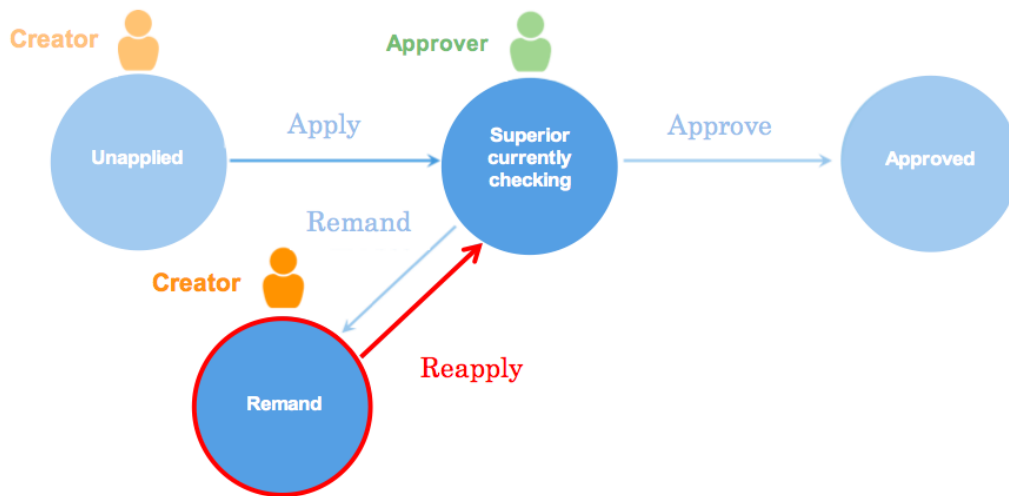The two buttons, "Remand" and "Approve," will appear

You can also create a process branch by setting two actions (approve and remand) like this example.

Let's set it up!

4-3. Set up the process for the "remand" status

Here, we will set up a process so that when the creator executes the "reapply" action, the status changes to "superior currently checking."

① Add process

Click "+" for "status for before executing action (in this example, 'superior currently checking')" to add a process.

You can add more than three statuses below.
You can also set up a complex process!

② Select status for before executing action

Here, we will set up "Status Before Taking Action." In this example, we will select **"Remand."**

③ Set up Assignees

Set assignees that can change the "Rmand" status. In this example, we will select "**Created by,**" under "**Add a field for selection**" so that Apps can re-apply.

④ Select status for after executing action

Select the status for after the action has been executed**.** In this example, we will select "**Superior currently checking.**"

⑤ Set the action name

Set the action name for executing an action. In this example, we will enter "**Reapply.**"

You have completed setting up processes!

Unapplied

Initial task status

↕ Superior currently checking ➕ ❌

↕ Remand ➕ ❌

↕ Approved ➕ ❌

| 3. Process Flow Settings

Set up actions between statuses.

Status Before Taking Action and Who Can Take Action | Branch Criteria | Status After Action Taken | Action Name

Unapplied ➕ ➡

Initial task status

Assignee List

Created by ▾

| All records ▾ ➕ | ➕ | Superior currently checking ▾ | Apply | ➕ |

Superior currently checking ▾ ➕ ❌ ➡

Assignee List

User chooses one assignee from the list to take action ▾

⌨ Add user, group or department   or   Add a field for selection ▾

👤 Approver ❌

All records ▾ ➕	➕	Remand ▾	Remand	➕ ❌
		Approved ▾	Approve	➕ ❌
✖ Clear All				

Remand ▾ ➕ ❌ ➡

Assignee List

User chooses one assignee from the list to take action ▾

⌨ Add user, group or department   or   Add a field for selection ▾

👤 Created by ❌

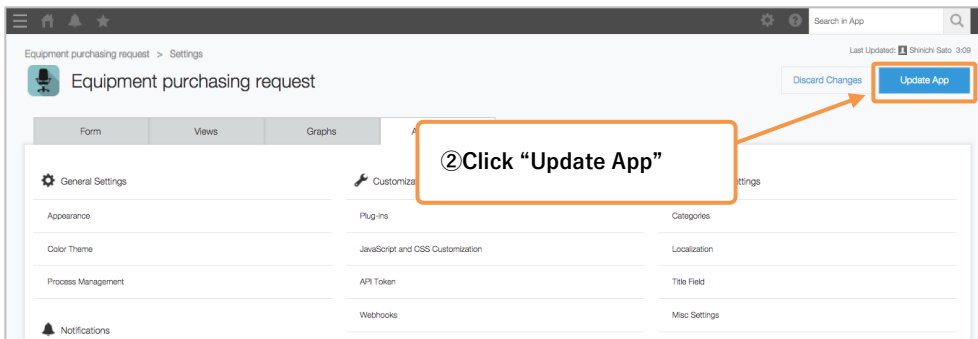| All records ▾ ➕ | ➕ | Superior currently checking ▾ | Reapply | ➕ |
| ✖ Clear All | | | | |

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● 5. Save your settings and update your App

① Save your settings

Click **"Save,"** at the top of the screen.
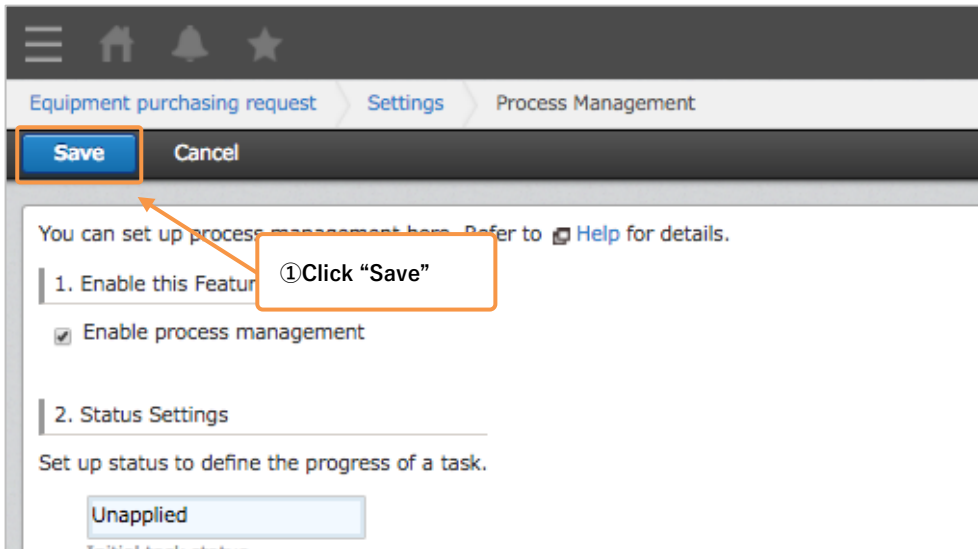
② Apply changes to your App

Click "**Update App**" at the top left of the screen, and apply changes to the App in the operating environment.

You have completed setting up a process management.

After you set up a process management, a view named " **(Assigned to me)**" will be created.

In this example, a list of records where you have been designated as the assignee (process assignee) will appear.

| Let's Try Using Process Management!

- **Operating as an applicant**

① Create a record and save

※ The user that enters in the "**Approver**" field will be the "Assignee," so make sure to enter.

①**Be sure to enter "Approver"**

③ Execute action "apply"

Click [**Apply**], confirm assignee, and click [Confirm]

② **The user selected in the "Approver" field becomes the next "Assignee"**

④ The "status" has been changed to **superior currently checking**, and the "Assigned to" has been changed to "**Approver** (Shinichi Sato).**"**

● Operating as an approver

① Confirm notifications/assigned to me and click

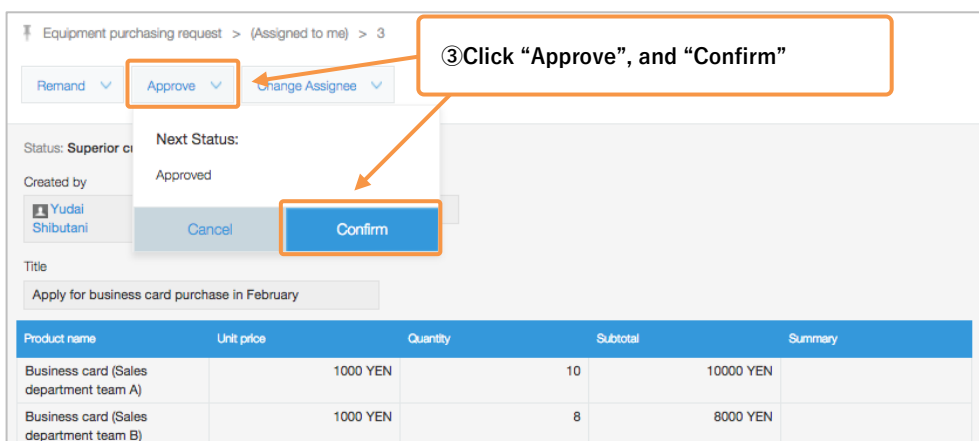①Click the kintone "Notifications" or "Assigned to Me"
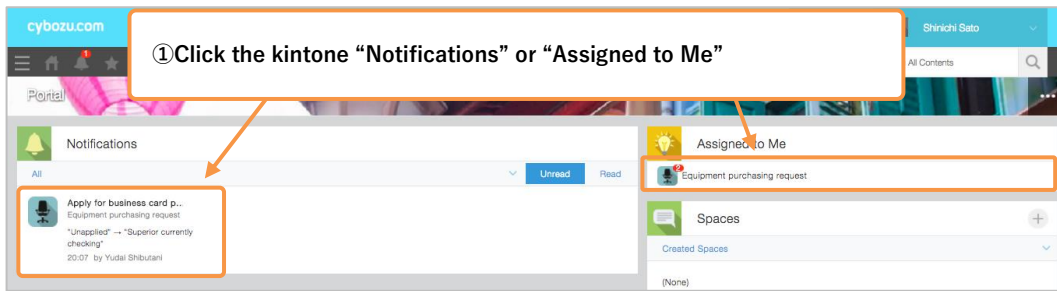
② A list of records where you are the assignee

A list of records where you are the "Assignee" will be displayed. The records details screen will be displayed.

②Display record details screen
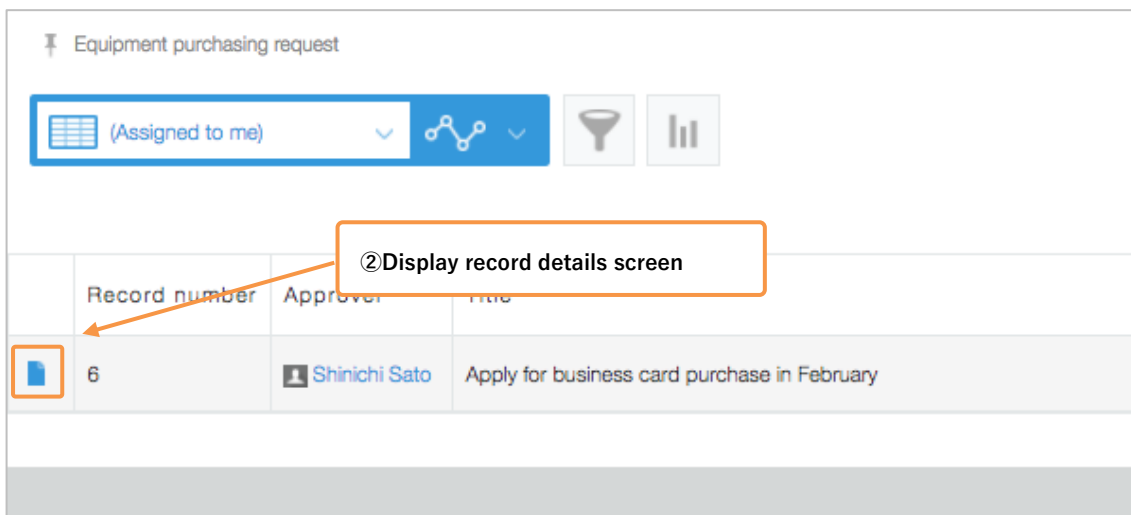
③ Approve request

Click " **Approve**" (action button) at the top of the record screen, and click "Confirm."

③Click "Approve", and "Confirm"

The "status" has been changed to **approved**!

Equipment purchasing request > (Assigned to me) > 3

Status: **Approved**   Status History

Created by   Approver

Yudai   Shinichi Sato
Shibutani

Title

Apply for business card purchase in February

Product name	Unit price	Quantity	Subtotal
Business card (Sales department team A)	1000 YEN	10	10000 YEN
Business card (Sales department team B)	1000 YEN	8	8000 YEN

| Tips

- ## Set users and groups as assignee

In the previous example, the "assignee" was selected from "Add a field for selection," but by using "**Add user, group or department**," you can directly select users, group, and department.

[Example: Checks from Yamawaki, the representative, are always necessary]
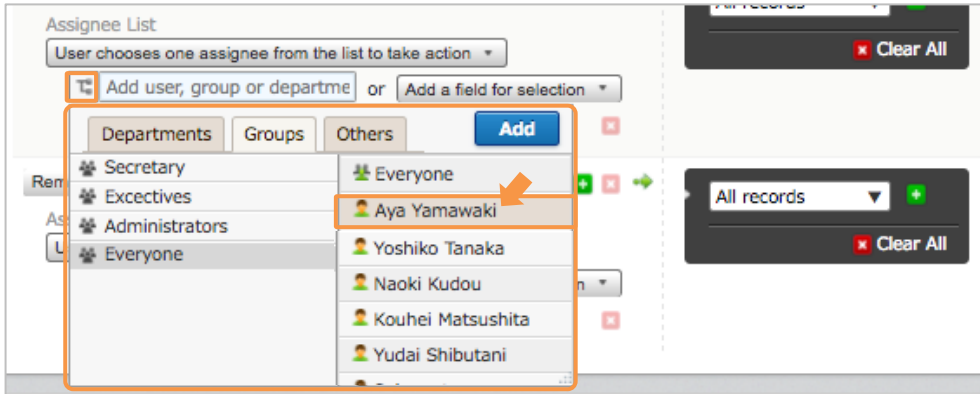
[Example: Marketing department must check]
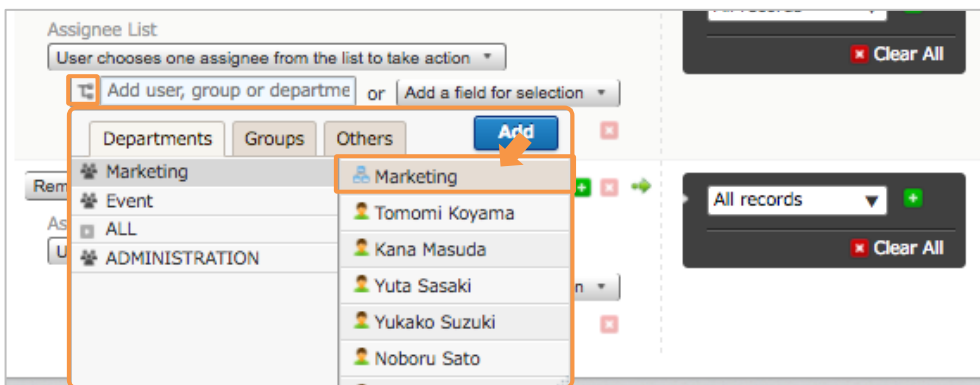
- ## Set conditional branch

By setting "Branch Criteria," you can branch the next action depending on the field value.

〔Example: Branch from when the total amount is 100,000 yen or more (manager's decision necessary) or below 100,000 yen (upper manager's decision)〕
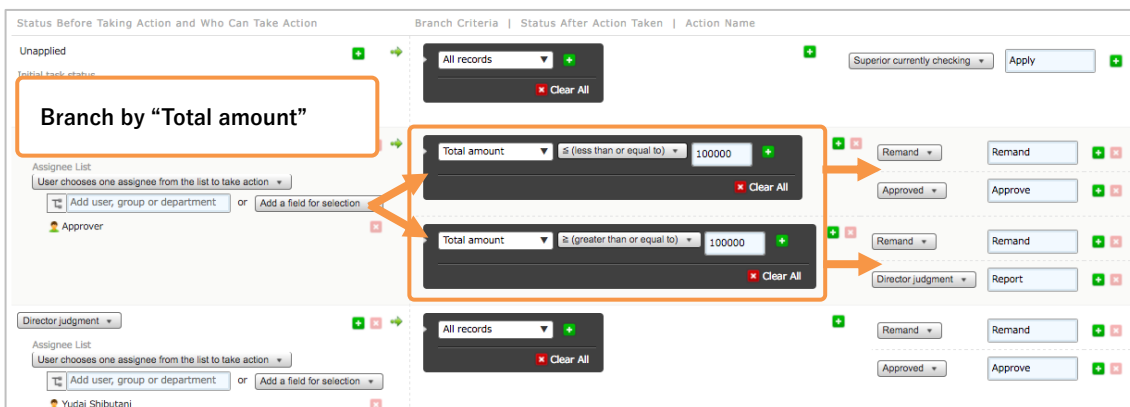
- ## Select "Status change rules" for when there are several assignees

When there are multiple assignees, you can select one of the three conditions to change statuses.

・User chooses one assignee from the list to take action: when a user designated

by the assignee confirms an action, the status is changed

・All assignees in the list must take action: When all the assignees confirm an action,

the status is changed

・One assignee in the list must take action: When one of the assignees confirms an action,

the status is changed
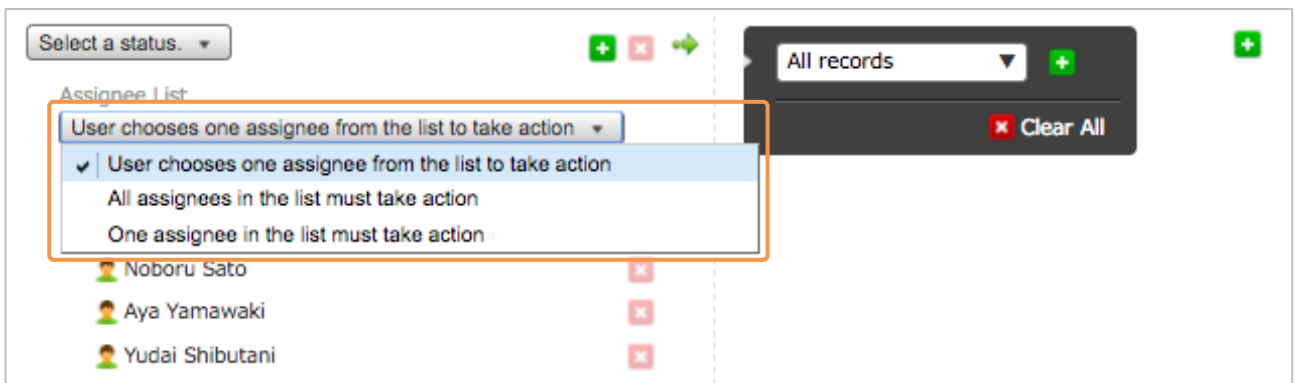
- ## Change notification record title

You can set the "Title Field" so that the content of the notifications can easily be understood when they

arrive.
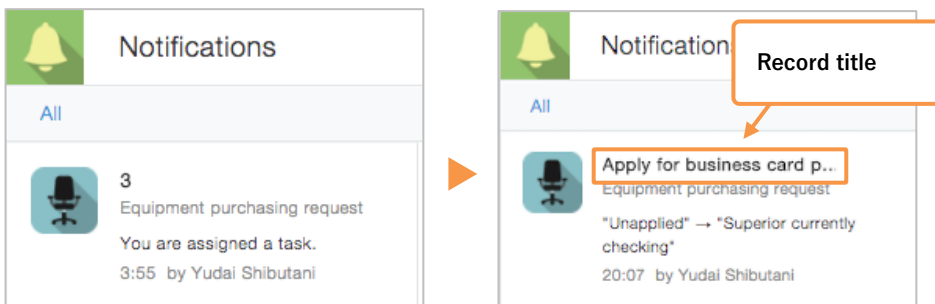
［How to set up title fields］

App Settings screen > Title Field (in the default settings, the titles are Record number)
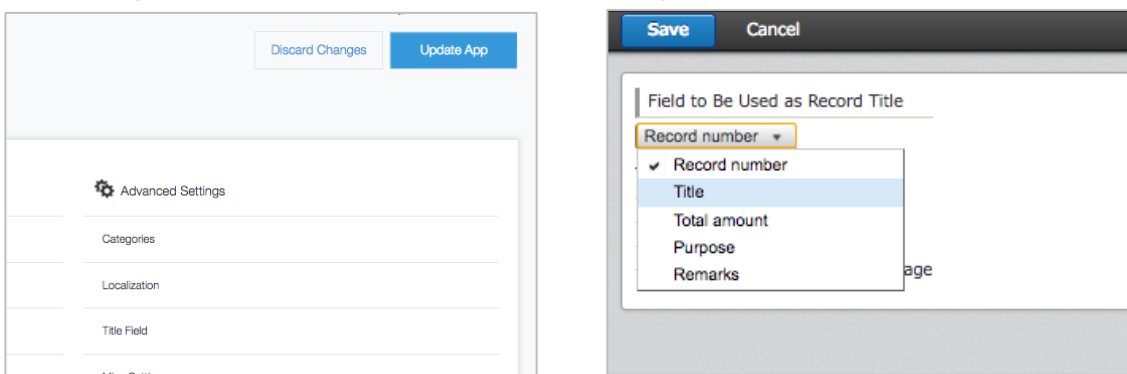
- **Use the "Status" and "Assignee" items**

By activating process management, the **"Status" and " Assignee"** items will be added.

For example, by using this, you can add "Status" and "Assignee" to the list screen, or use them as search conditions.
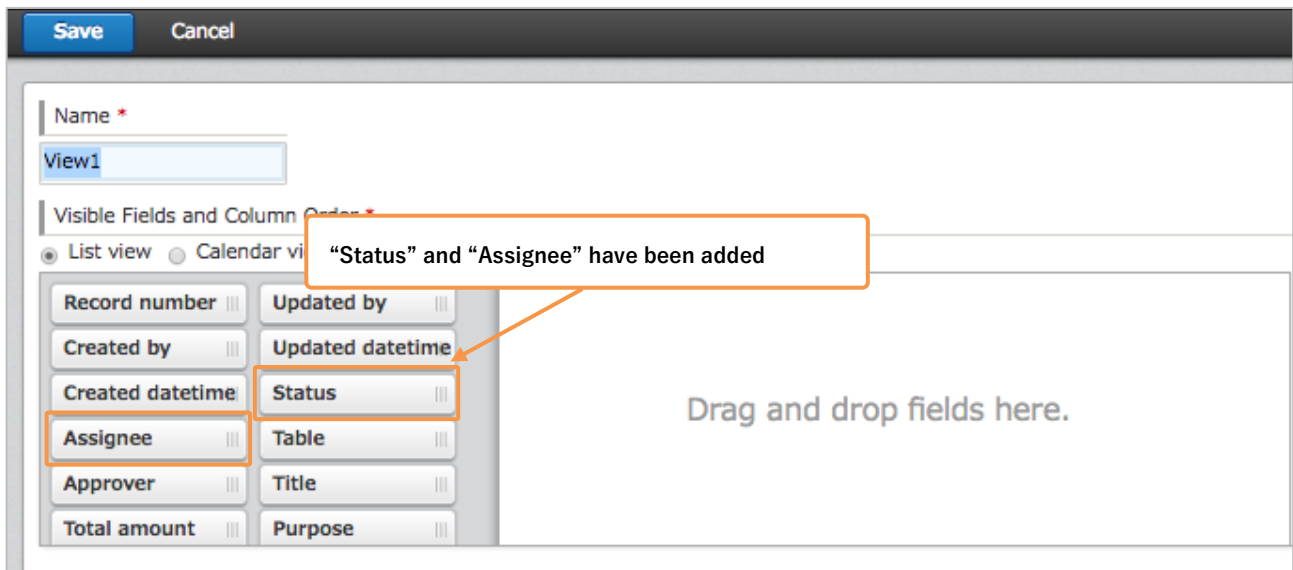
[Example: Add "Status" and "Assignee" to the list screen

| Example uses of Sample Process Management

- ## Transportation Reimbursement

  <<Approving requests and managing approval decisions>>

You can register monthly transportation fees and apply to the approver.

- ## Travel Expenses Reimbursement

  <<approving requests and managing approval decisions>>

You can apply for all generated travel expenses, expenses, and daily allowances at once, as well as confirm and approve from outside the company.