



Let's use it conveniently



basic guidebook

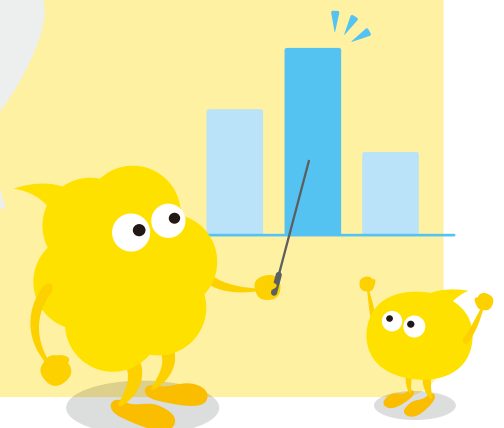
vol. 03

# Graphs and Spreadsheets

Here, we will use the “Sales management application” to explain how to make graphs from record information registered with applications!

Solve common problems!

It's a lot of work compiling sales and preparing report materials every time we have a meeting. Isn't there some way I can constantly see the latest sales figures?!



# Before implementing graphs and spreadsheets



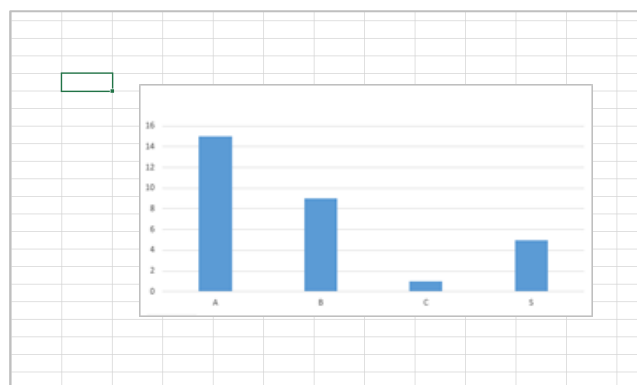
## Sales Management App

- Sales figures were aggregated via Excel, and made into graphs
- Aggregating takes time
- New information had to be updated manually every time



Sales management					
Sales management					
(All fields) [Filter Icon] [Bar Chart Icon]					
Records 1 -					
	Record number	Branch name	Date	Sales	Assignee
	67	Shinagawa	Jul 20, 2016	307600 YEN	Shyuichiro Sakamoto
	66	Shinagawa	Jul 20, 2016	253200 YEN	Kentaro Fukasawa
	65	Suidoubashi	Jul 24, 2016	337800 YEN	Hidetaka Ando
	64	Nihonbashi	Jul 20, 2016	357500 YEN	Shinichi Shibutani
	63	Suidoubashi	Jul 25, 2016	253500 YEN	Koji Ito

Accumulated data was outputted and aggregated manually



# After implementing graphs and spreadsheets

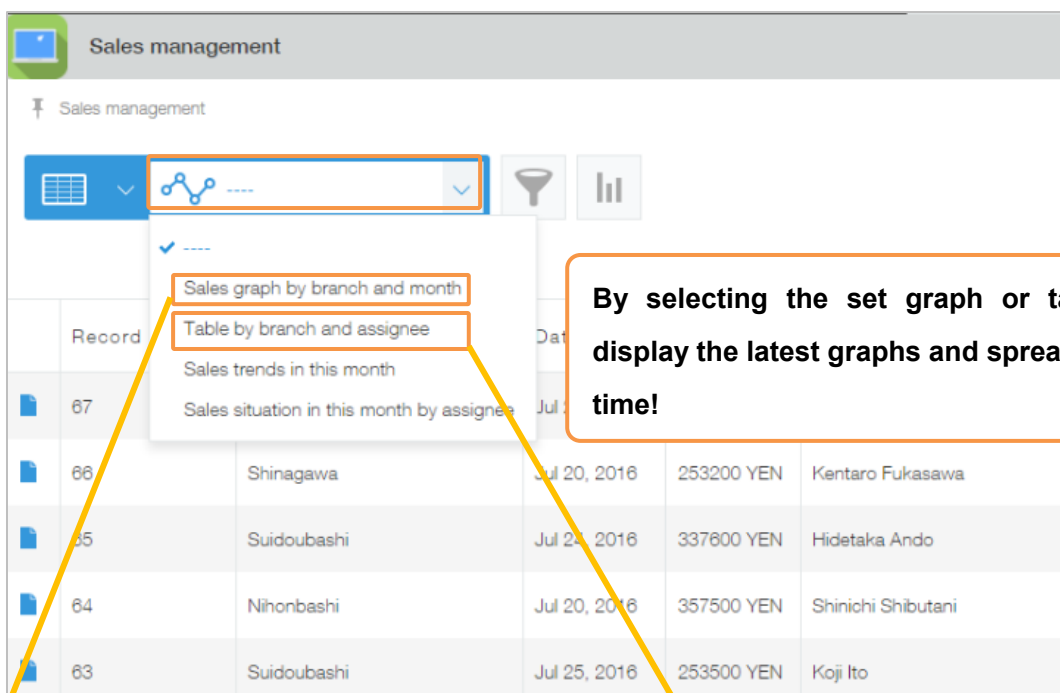


## Sales Management App

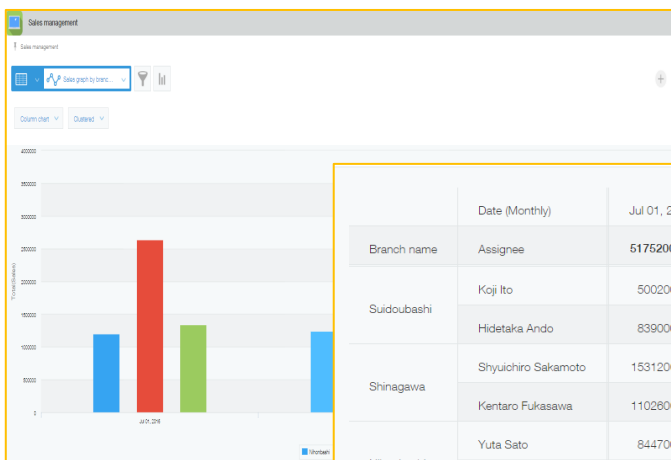


- Set aggregation conditions to **automatically create graphs**

- Labor spent on aggregating and creating graphs were largely reduced
- Manual updates were made unnecessary, with the latest information always available



By selecting the set graph or table, you can display the latest graphs and spreadsheets at any time!



	Date (Monthly)	Jul 01, 2016	Aug 01, 2016	Sep 01, 2016	Total (Assignee)	Total (Branch name)
Branch name	Assignee	5175200 YEN	6289300 YEN	8046600 YEN	19511100 YEN	19511100 YEN
Suidoubashi	Koji Ito	500200 YEN	1142700 YEN	1162400 YEN	2905300 YEN	6553400 YEN
	Hidetaka Ando	839000 YEN	1553400 YEN	1355700 YEN	3748100 YEN	
Shinagawa	Shyuichiro Sakamoto	1531200 YEN	1133000 YEN	1420000 YEN	4084200 YEN	8421700 YEN
	Kentaro Fukasawa	1102600 YEN	1216100 YEN	2018800 YEN	4337500 YEN	
Nihonbashi	Yuta Sato	844700 YEN	906500 YEN	651800 YEN	2403000 YEN	4536000 YEN
	Shinichi Shibutani	357500 YEN	337600 YEN	1437900 YEN	2133000 YEN	

# How to create graphs

When using the graph function, total figures and record numbers can be aggregated via the record information registered with the application. Set conditions can be displayed at the top page of the application (record list).

In kintone, you can use the following two methods to aggregate data and create graphs or charts.

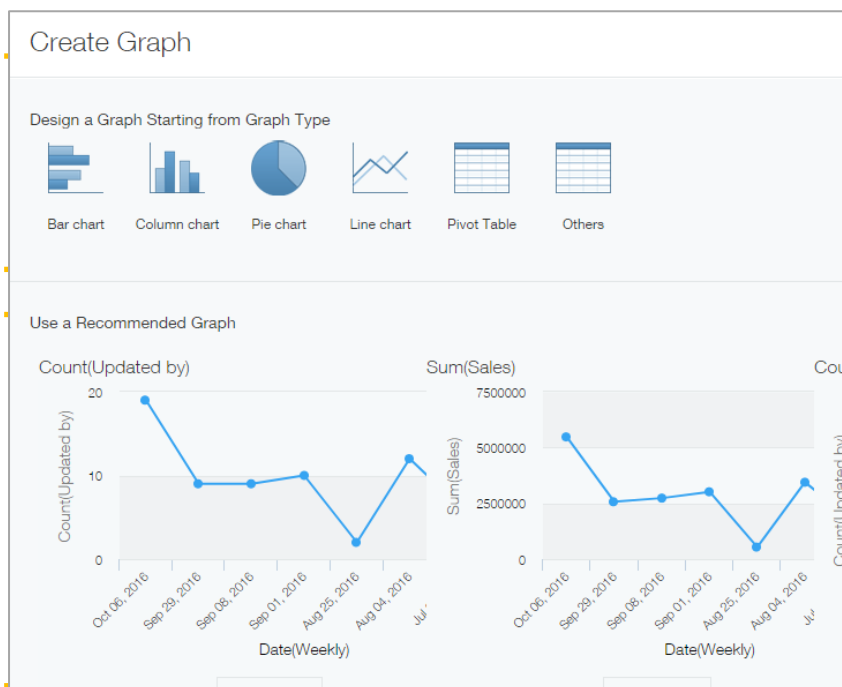
## ① Create by **selecting a graph type**

Set the type and aggregation conditions manually to create graphs or charts.

## ② Create by **selecting from recommendations**

Suggested graphs and tables automatically created based on the data in the application will appear. By selecting one that meets your needs, you can automatically create a graph or chart.

In this example, we will select “①Create by **selecting a graph type**,” and create a column chart that aggregates monthly sales of each branch.



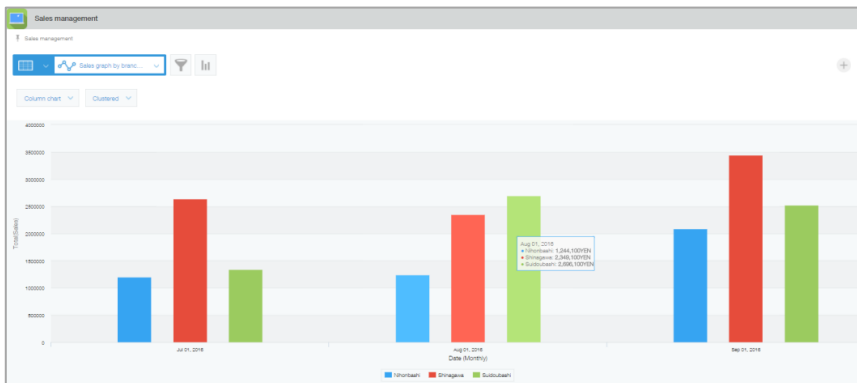
① Create by selecting a graph type

② Create by selecting from recommendations

Click a graph in 'Recommended Graph' space if you find it suitable for your project! It is already available to use!




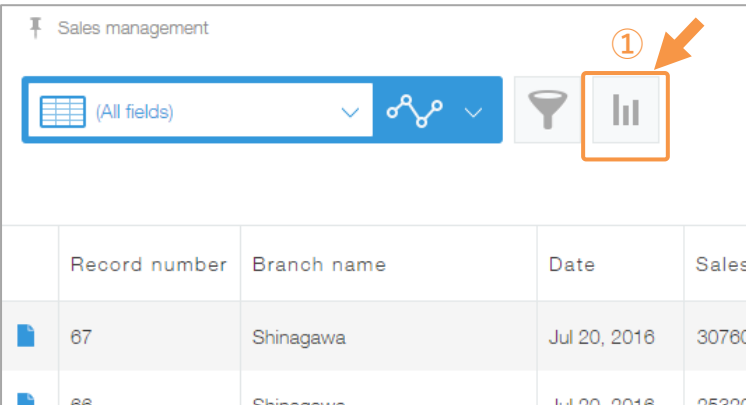
## 【Completed image】



### 1. Create by selecting a graph type

① Open the graph settings screen

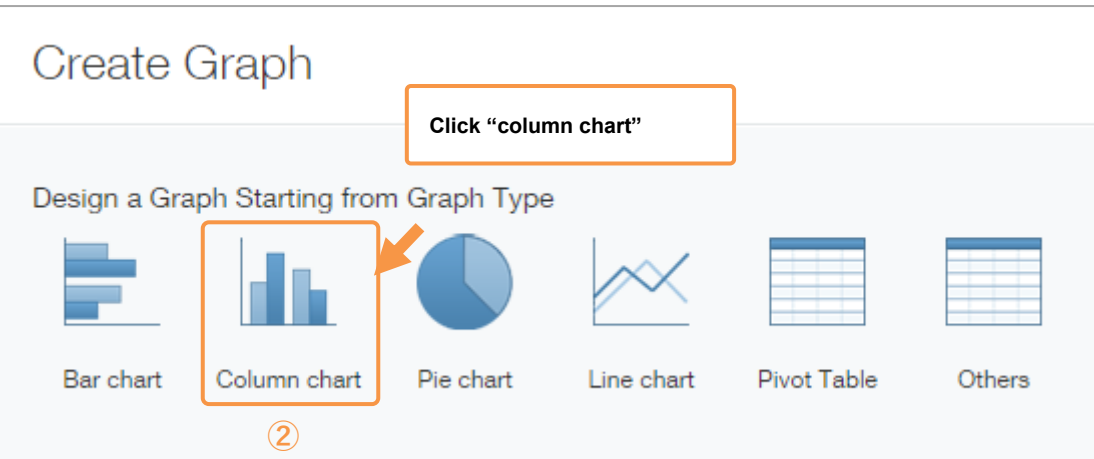
From the application list screen, click 



Record number	Branch name	Date	Sales
67	Shinagawa	Jul 20, 2016	307600
68	Shinagawa	Jul 20, 2016	253200

② Select a graph

Select a graph type under “Create by selecting a graph type.” In this example, we will select a **[column chart]**.



Click “column chart”

Design a Graph Starting from Graph Type

Bar chart Column chart Pie chart Line chart Pivot Table Others

## 2. Setting graph options


### ① Set graph type

Select how the aggregation results should be displayed. In this example, we will select **[Column chart]** **[Clustered]**.

※See P13 for “graph types and uses” in kintone.

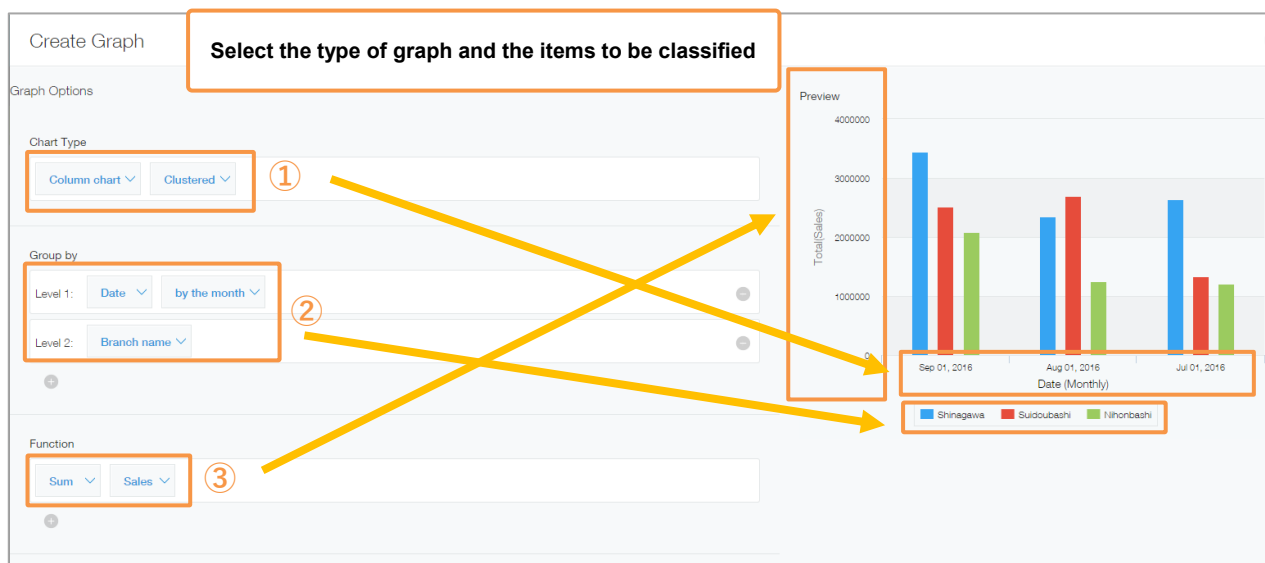
### ②Select ‘Group by’ as items to be classified

Select items used for aggregation. In this example, we want to aggregate monthly sales for each branch, so we will set the major item as **[Sales] [By month]**, and the medium item as **[Branch name]**.

※By clicking , you can add Level 1 ~3 items.

### ③Select ‘Function’ as an aggregation method

Set the record aggregation method. You can select “Number of records,” “Total,” “Average” “Maximum value,” and “Minimum value.” In this example, we want to aggregate the total sales amount, so we will select **[Total]** and **[Sales amount]**.



A preview appears, so it's convenient to choose while looking at the completed image!

Let's set the major item on the horizontal axis, the medium item on the series, and the aggregation method on the vertical axis.



#### ④Set the conditions

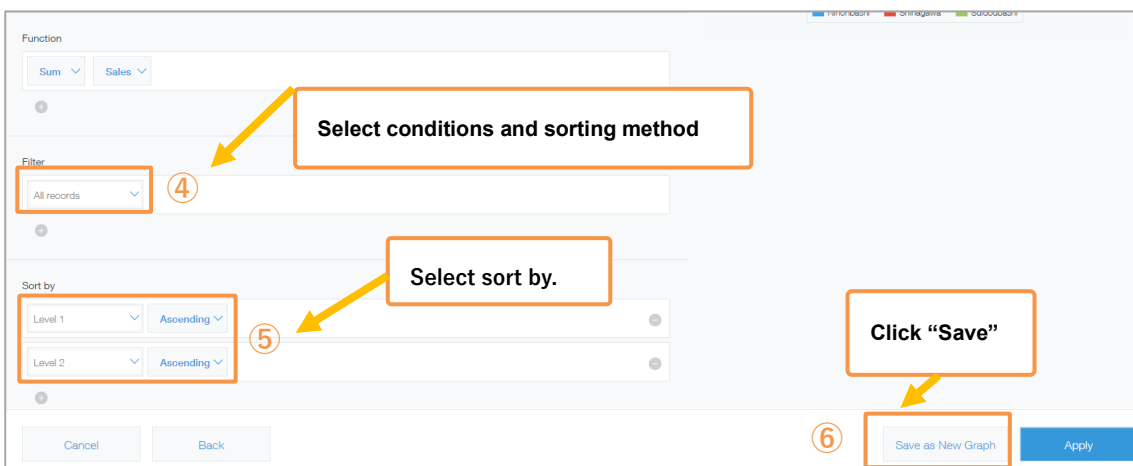
When narrowing down aggregations to specific records, such as when designating an aggregation period, we can set the “Filtering conditions.” In this example, we will not narrow down our aggregation, so we will leave it as **[All records]**.

#### ⑤Set sorting

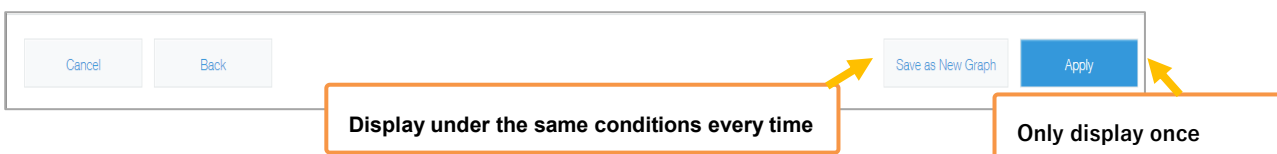
Set the sorting method of aggregation results. By selecting “Total”, “Level1”, “Level2” or “Level3,” the results will be sorted by the set field values for each item. In this example, we will select **[Level1]** **[Ascending]**, and **[Level2]** **[Ascending]**.

#### ⑥Save

Click **[Save]** at the bottom-right of the screen.



#### • Difference between “Save” and “Apply”



**[Save]:** You can save the conditions for your graphs and spreadsheets. Because you won’t need to set them again, if you plant to use them frequently in the future, it is convenient to save.

(※ “Save” can only be used by the **application administrator**.)

**[Apply]:** The graph will be displayed with the set content, but the conditions will not be saved. If you wish to reset the conditions every time based on your needs and show the aggregation results, this is convenient.

### ⑦Enter graph name

Set the graph name. In this example, we will enter “Sales graph by branch and month,” and click [OK].

Save as New Graph

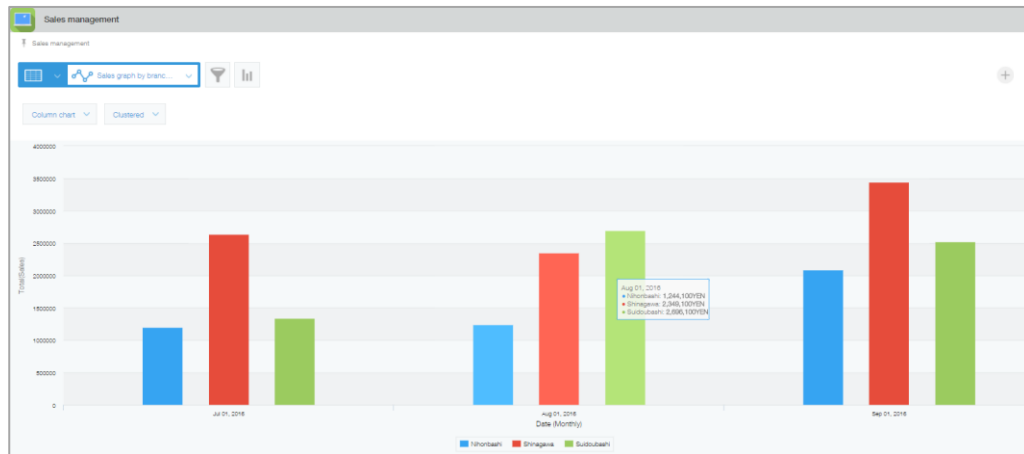
Name \*

Sales graph by branch and month

Cancel OK

Enter the graph name and click OK

Monthly sales graph is complete!



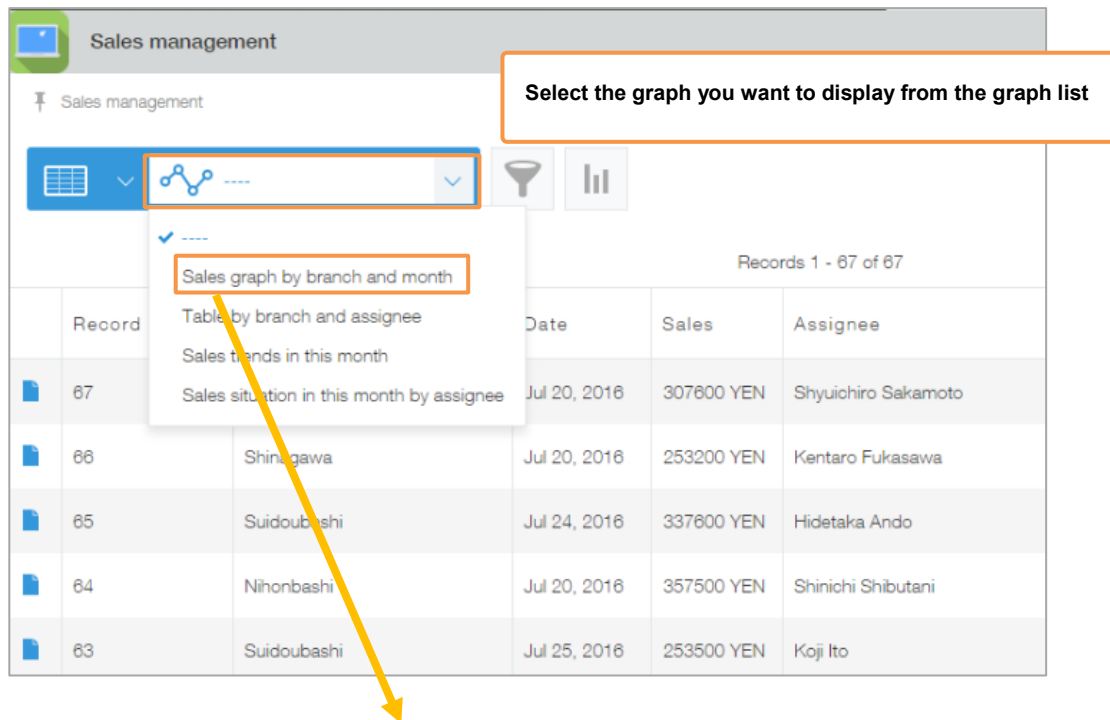


# Let's try displaying graphs!

Let's display the graph we created to check if the aggregated value is being displayed or not. Additionally, we'll make a graph using another application.

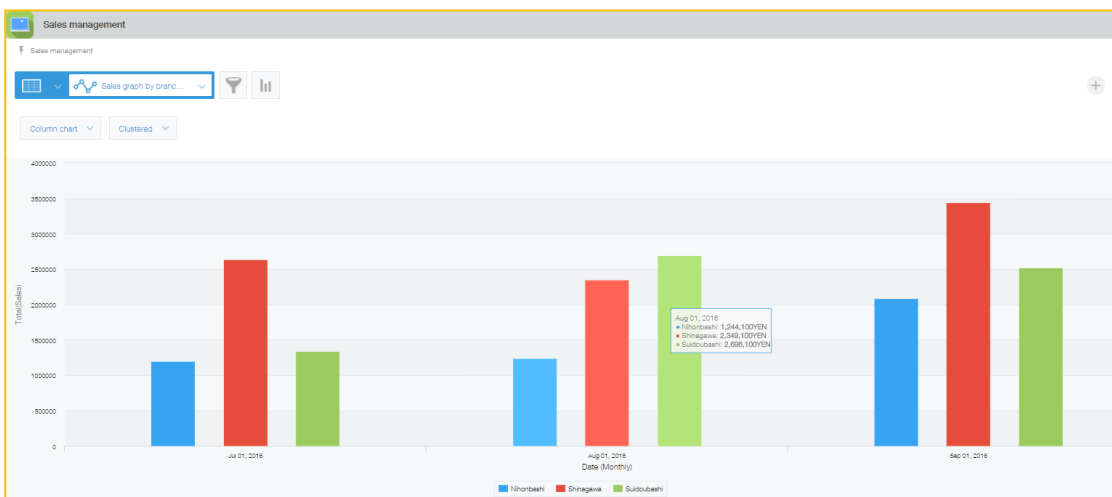
- **Displaying graphs**

By clicking “” and selecting the graph we created, you can display the graph.




Select the graph you want to display from the graph list

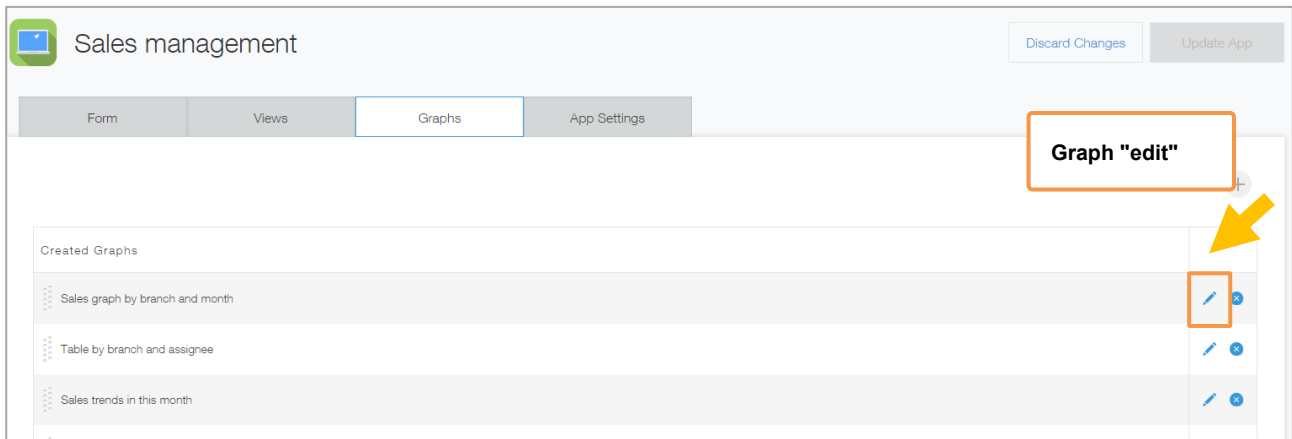
Record	Date	Sales	Assignee
67	Jul 20, 2016	307600 YEN	Shyuichiro Sakamoto
66	Jul 20, 2016	253200 YEN	Kentaro Fukasawa
65	Jul 24, 2016	337600 YEN	Hidetaka Ando
64	Jul 20, 2016	357500 YEN	Shinichi Shibutani
63	Jul 25, 2016	253500 YEN	Koji Ito



- **Changing graph settings**

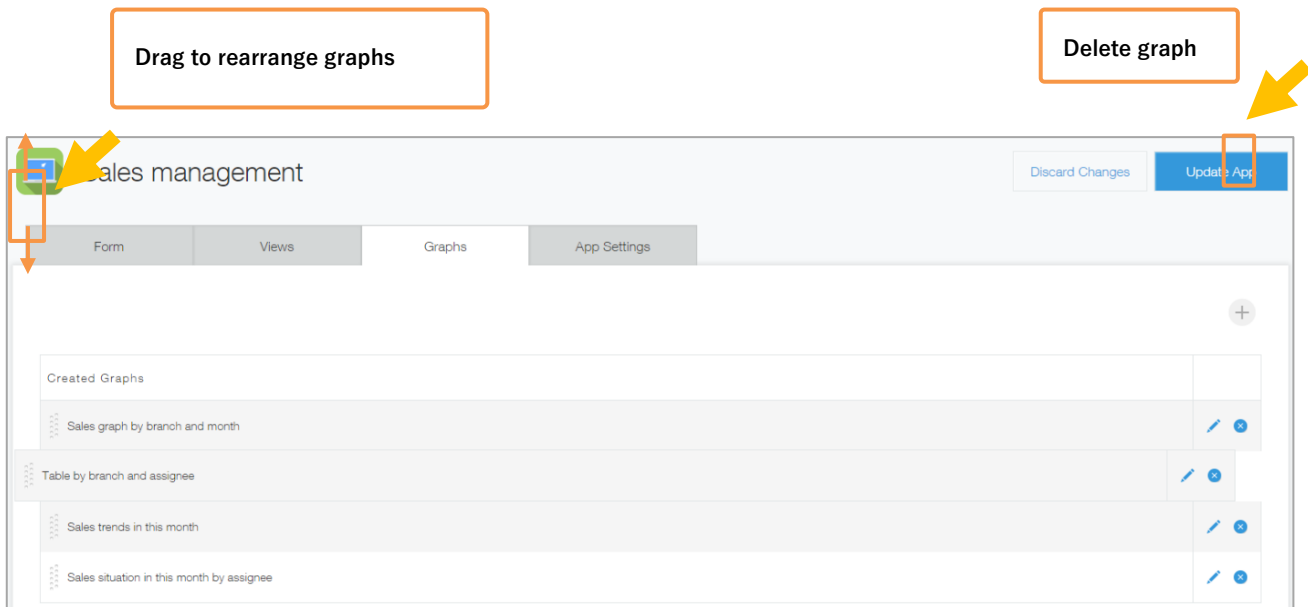
Graph settings can be changed from the application's settings screen.

Open the “graph” tab, and click  (edit) for the graph you want to change settings.



- **Sorting and deleting graphs**

You can sort and delete graphs from the application settings screen.

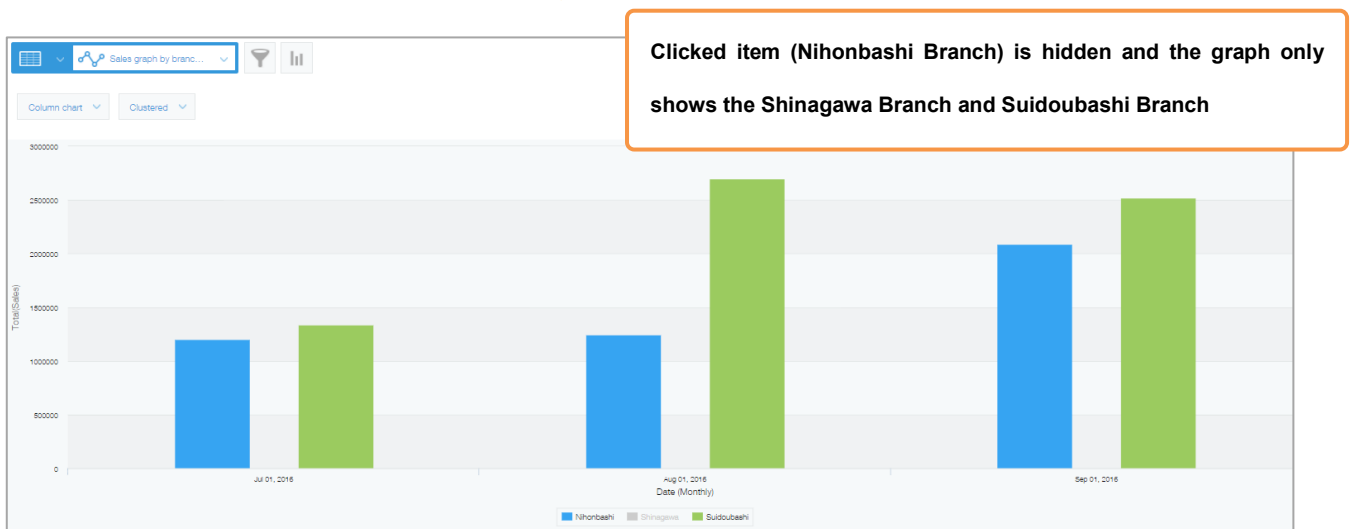
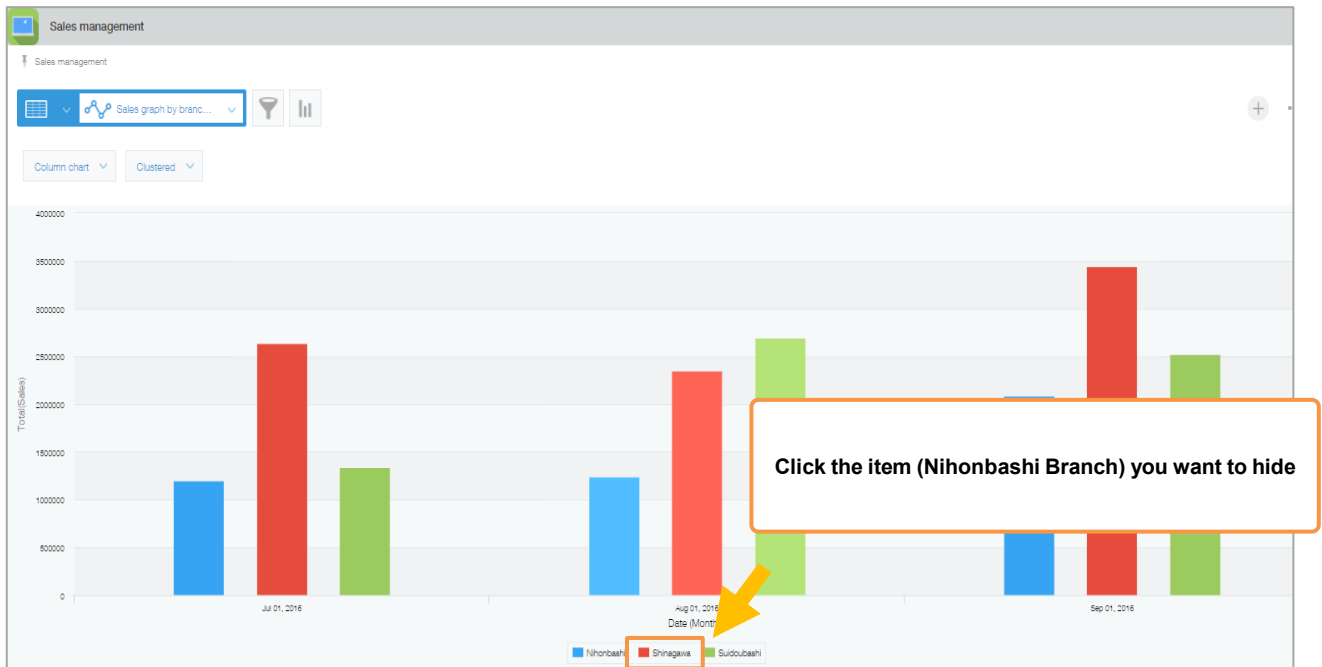


# Tips1

- **Changing displayed items**

You can display/hide items by clicking on the item name at the bottom of the graph.

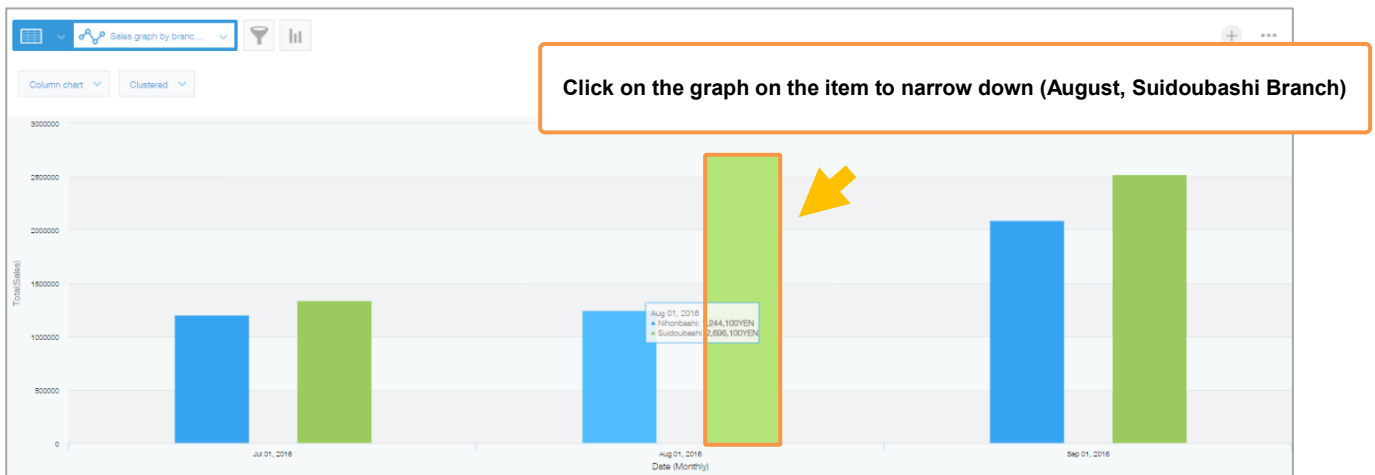
This function is convenient when you want to compare specific items from the displayed results.



- **Narrow down and display from graphs**

By clicking an item from graph, you can display a list narrowed down to the corresponding record.

This is useful when you want to comprehend what records are included in the total result.



**Sales management**

Sales management

(All fields)

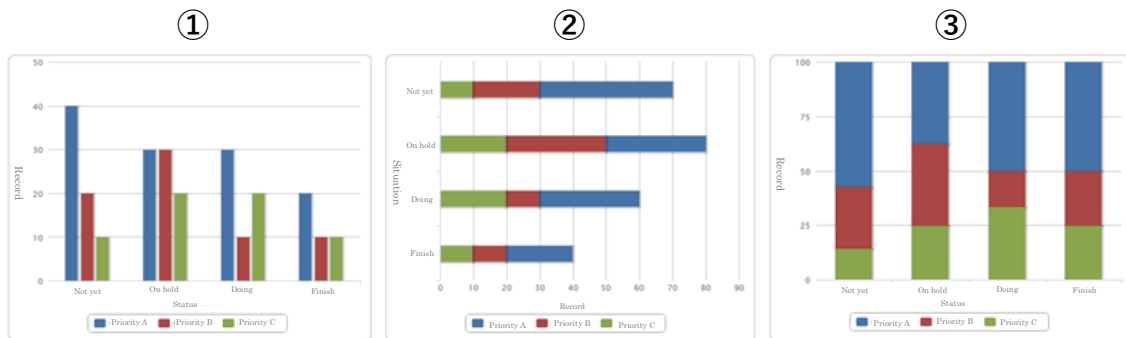
**A list of narrowed items (August, Suidoubashi Branch) is displayed**

	Record number	Branch name	Date	Sales	Assignee	
	52	Suidoubashi	Aug 23, 2016	265900 YEN	Hidetaka Ando	
	50	Suidoubashi	Aug 25, 2016	307600 YEN	Hidetaka Ando	
	49	Suidoubashi	Aug 25, 2016	253200 YEN	Koji Ito	
	47	Suidoubashi	Aug 25, 2016	357500 YEN	Hidetaka Ando	
	46	Suidoubashi	Aug 25, 2016	253500 YEN	Koji Ito	

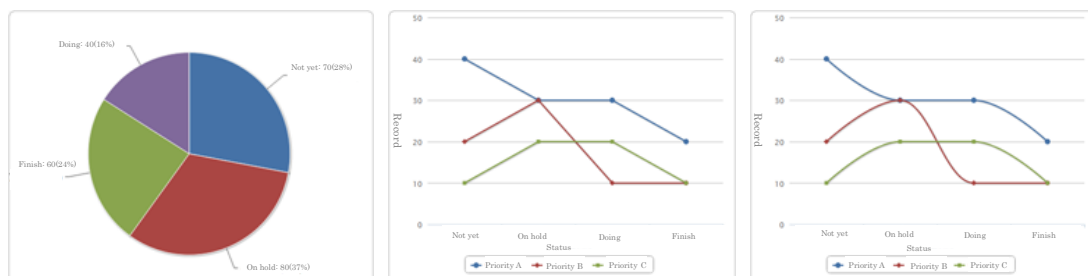
# [Graph types and uses]

1. **Horizontal bar chart/column chart:** a graph that shows aggregate values per item, represented as bars

- ①Aggregate: A graph suited for comparing sizes
- ②Stacked: A graph suitable for comparing the ratio to the whole and the total value
- ③100% stacked: A graph suitable for comparing a percentage to the whole



- 2. **Pie chart:** A graph suitable for expressing the ratio to the whole graph
- 3. **Line graph:** A graph suitable for expressing changes in aggregate values over time
- 4. **Curve graph:** A graph suitable for expressing changes in aggregate values over time



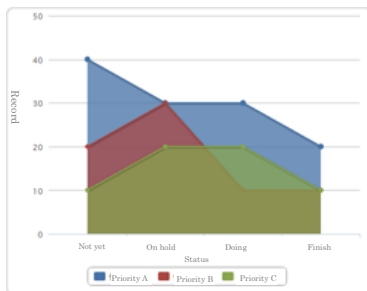
5. **Area graph:** A graph expressed as a line graph, with the area toward the X axis is filled with color

①Unstacked: A graph suitable for expressing the difference between aggregate values over time and aggregated values for each item

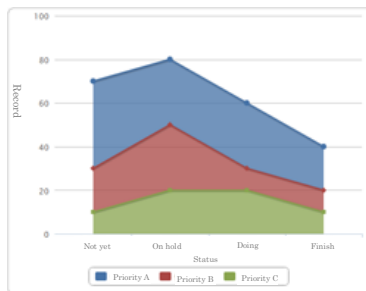
②Stacked: A graph suitable for expressing a change in aggregate value for each item with the lapse of time and a change in the total sum value over time

③100% Stacked: A graph appropriate for expressing the change with the passage of time of the ratio of the total value of each item to the whole

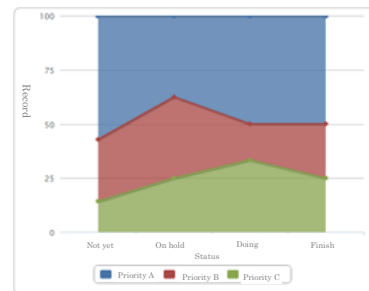
①



②



③



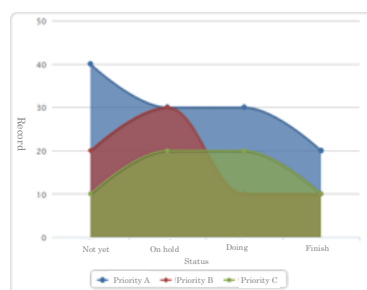
6. **Curved surface graph:** A graph that is represented by a smooth curve and in which an area toward the X axis is filled with a color graph

①Unstacked: A graph suitable for expressing the difference between aggregate values over time and aggregated values for each item

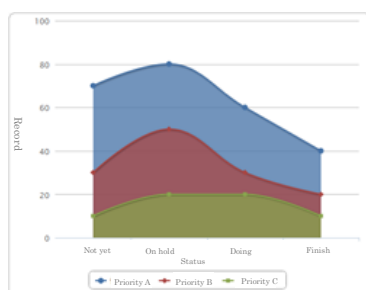
②Stacked: A graph suitable for expressing a change in aggregate value for each item with the lapse of time and a change in the total sum value over time

③100% Stacked: A graph appropriate for expressing the change with the passage of time of the ratio of the total value of each item to the whole

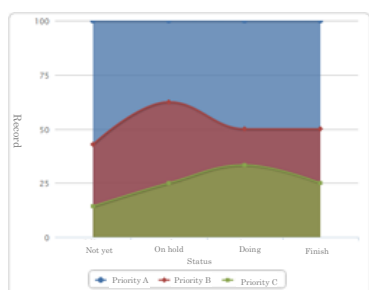
①



②



③

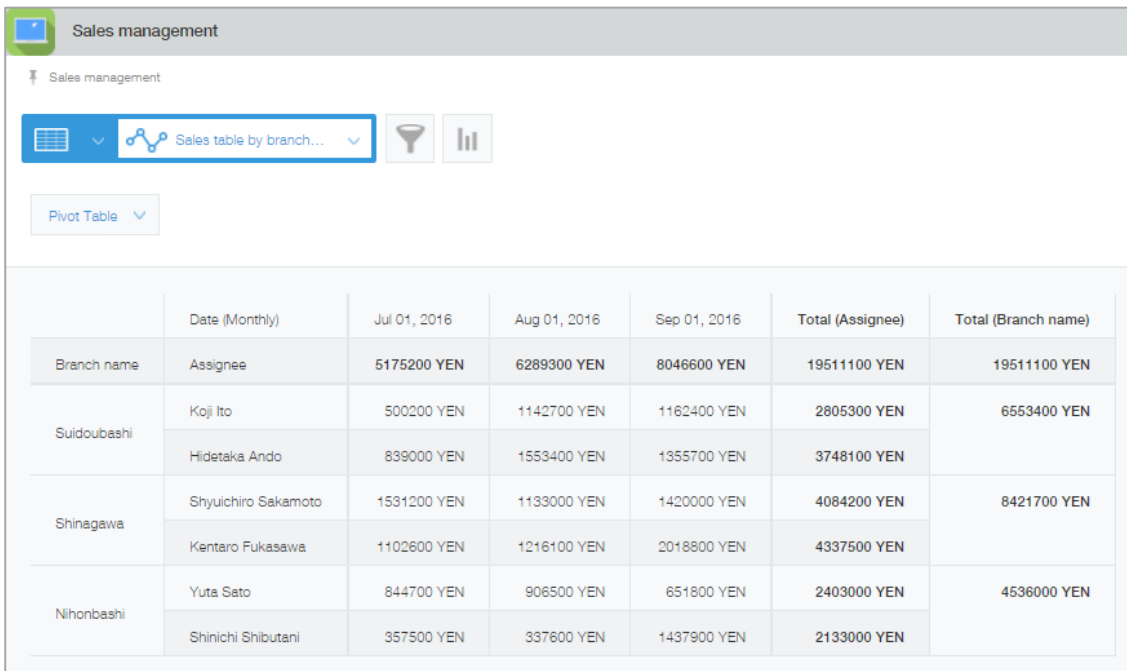


# How to set Pivot Table

You can also create a **pivot table, which aggregates by** multiple items.

Here, we will use the “Sales management” application to aggregate monthly sales for all branches, and display the total sales per “branch” and “representative” from there.


【Completed image】

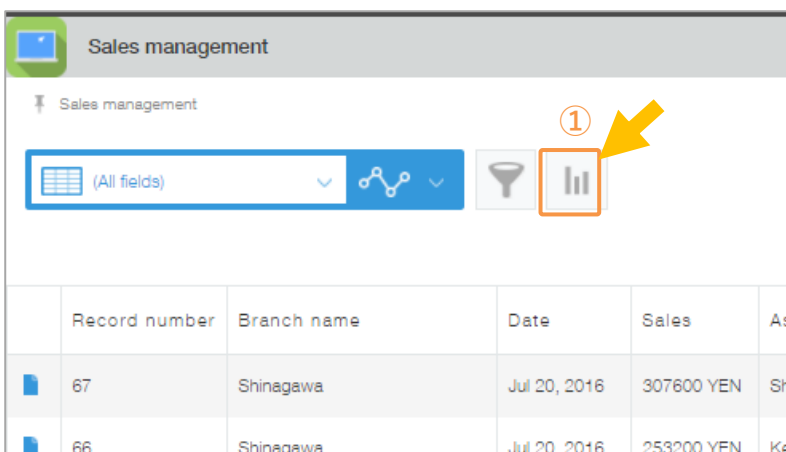




	Date (Monthly)	Jul 01, 2016	Aug 01, 2016	Sep 01, 2016	Total (Assignee)	Total (Branch name)
Branch name	Assignee	5175200 YEN	6289300 YEN	8046600 YEN	19511100 YEN	19511100 YEN
Suidoubashi	Koji Ito	500200 YEN	1142700 YEN	1162400 YEN	2805300 YEN	6553400 YEN
	Hidetaka Ando	839000 YEN	1553400 YEN	1355700 YEN	3748100 YEN	
Shinagawa	Shyuichiro Sakamoto	1531200 YEN	1133000 YEN	1420000 YEN	4084200 YEN	8421700 YEN
	Kentaro Fukasawa	1102600 YEN	1216100 YEN	2018800 YEN	4337500 YEN	
Nihonbashi	Yuta Sato	844700 YEN	906500 YEN	651800 YEN	2403000 YEN	4536000 YEN
	Shinichi Shibutani	357500 YEN	337600 YEN	1437900 YEN	2133000 YEN	

## 1. Create by selecting a chart type

①Open the graph settings screen

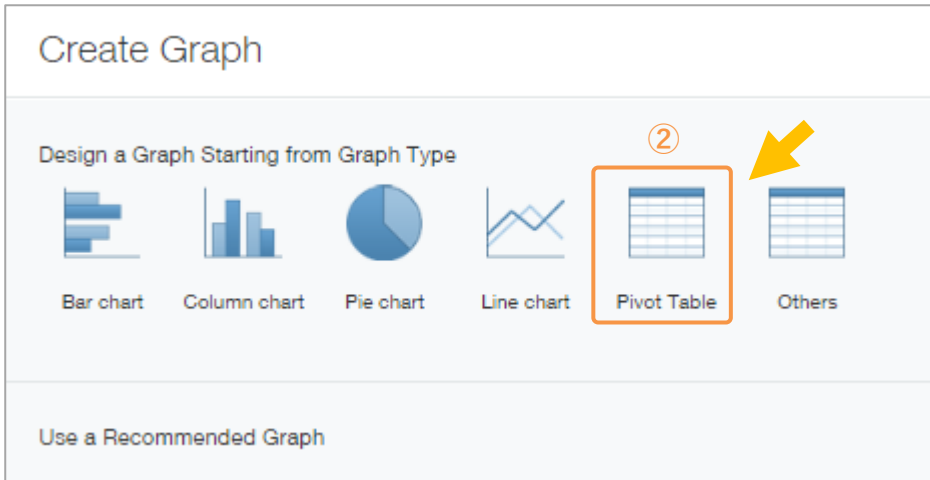
Click  from the application list screen.



	Record number	Branch name	Date	Sales	As
	67	Shinagawa	Jul 20, 2016	307600 YEN	Sh
	66	Shinagawa	Jul 20, 2016	253200 YEN	Ke

## ②Select a graph

Select a graph type from “Create by selecting a graph type.” In this example, we will select the **[Pivot Table]**.



## 2. Setting chart options

### ①Select items to classify

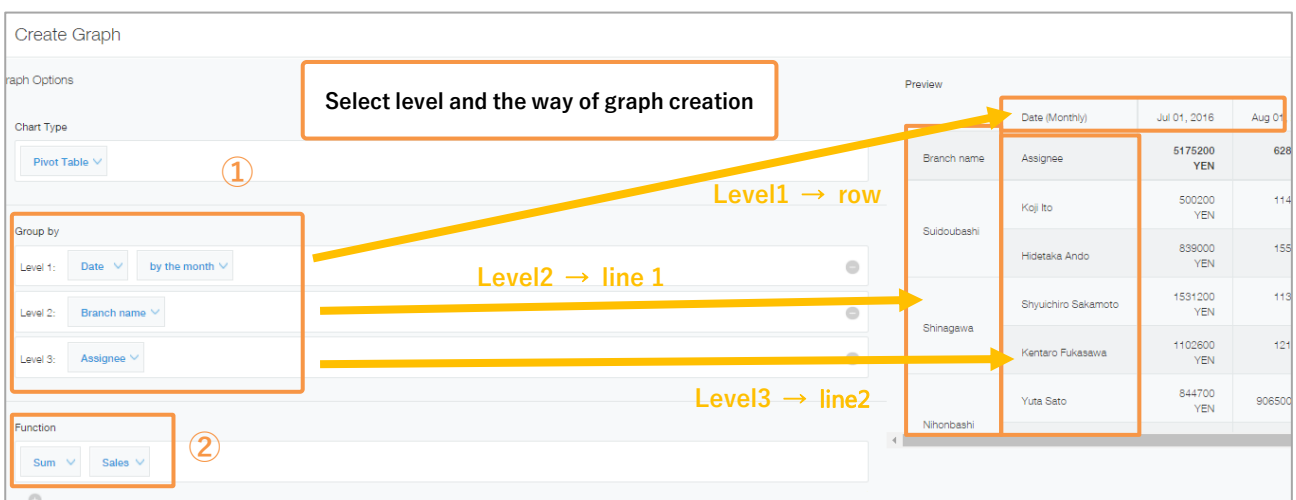
Select items used for aggregation. You can select Level 1, Level 2, and Level 3. In this example, we want to aggregate monthly sales for each branch, so we will set the major item as [Sales] [By month], and the medium item as [Branch name], and the small item as [Representative name].

※ The Level 1 item is displayed on the horizontal axis, and the medium and small items are displayed on the vertical axis.

※Records with empty values for items set as classification items cannot be used as aggregation targets.

### ②Select aggregation method

Set the record's aggregation method. We want to aggregate the corresponding record's amount, so we will select **[Total] [Sales amount]**.





### ③Set the conditions

When narrowing down aggregations to specific records, we can set the “Filtering conditions.” In this example, we will not narrow down our aggregation, so we will leave it as **[All records]**.

※When narrowing down records by using fields in tables, if one of the rows in the tables meets the field value conditions, that record will be an aggregate target.

### ④Select sorting method

Select the sorting method (order) of aggregation results. In this example, we will select **[Level1][Ascending]**, and **[Level2][descending]**.

### ⑤Save

Click **[Save]** at the bottom right of the screen.

The screenshot shows a configuration interface with two main sections: 'Filter' and 'Sort by'. In the 'Filter' section, a dropdown menu is set to 'All records', with a circled '3' next to it. A callout box points to this section with the text 'Select conditions and sorting method'. In the 'Sort by' section, there are two rows. The first row has 'Level 1' selected in the dropdown and 'Ascending' in the order dropdown, with a circled '4' next to it. The second row has 'Level 2' selected and 'Descending' in the order dropdown. At the bottom, there are buttons for 'Cancel', 'Back', 'Save as New Graph' (with a circled '5' next to it), and 'Apply'. A callout box points to the 'Save as New Graph' button with the text 'Click “Save”'.

Your Pivot Table of sales by branch and representative name is complete!

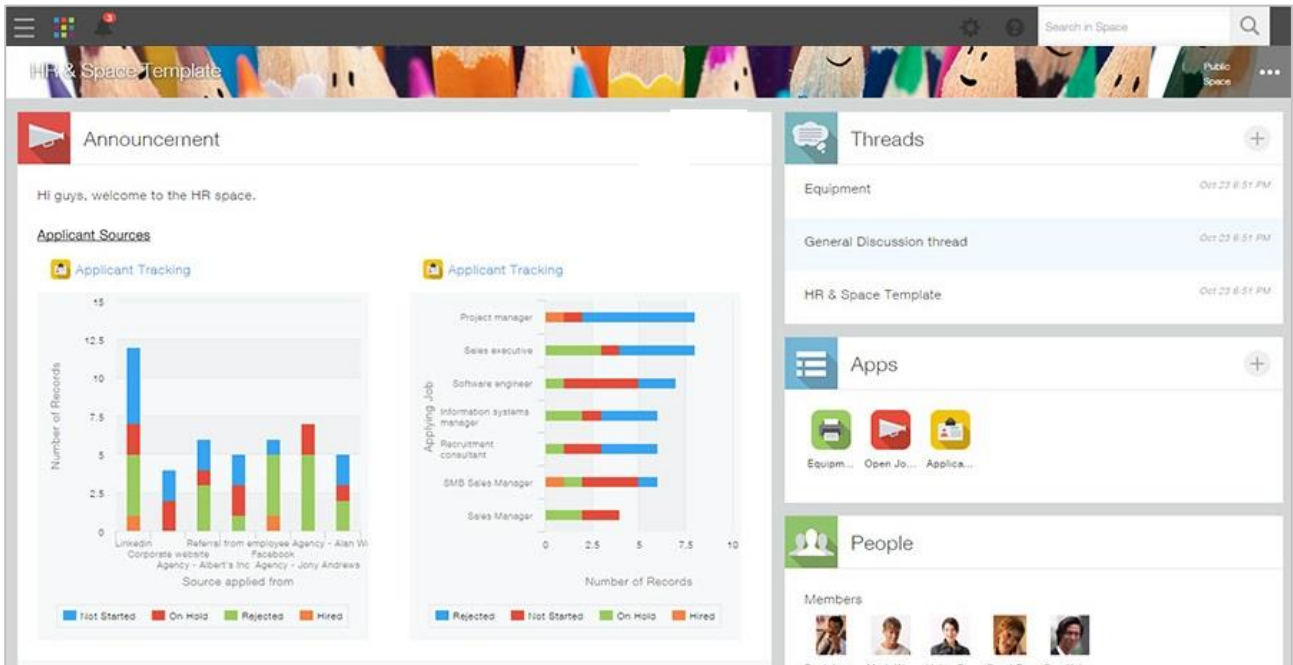
Sales management						
Sales management						
Sales table by branch...						
Pivot Table						
	Date (Monthly)	Jul 01, 2016	Aug 01, 2016	Sep 01, 2016	Total (Assignee)	Total (Branch name)
Branch name	Assignee	5175200 YEN	6289300 YEN	8046600 YEN	19511100 YEN	19511100 YEN
Suidoubashi	Koji Ito	500200 YEN	1142700 YEN	1162400 YEN	2805300 YEN	6553400 YEN
	Hidetaka Ando	899000 YEN	1553400 YEN	1355700 YEN	3748100 YEN	
Shinagawa	Shyuichiro Sakamoto	1531200 YEN	1133000 YEN	1420000 YEN	4084200 YEN	8421700 YEN
	Kentaro Fukasawa	1102600 YEN	1216100 YEN	2018800 YEN	4337500 YEN	
Nihonbashi	Yuta Sato	844700 YEN	906500 YEN	651800 YEN	2403000 YEN	4536000 YEN
	Shinichi Shibutani	357500 YEN	337600 YEN	1437900 YEN	2133000 YEN	

## Tips2

- **Paste to the portal and space**

Graphs and charts can be pasted to kintone's portal and space.

You can check the latest aggregation information without having to open individual applications.



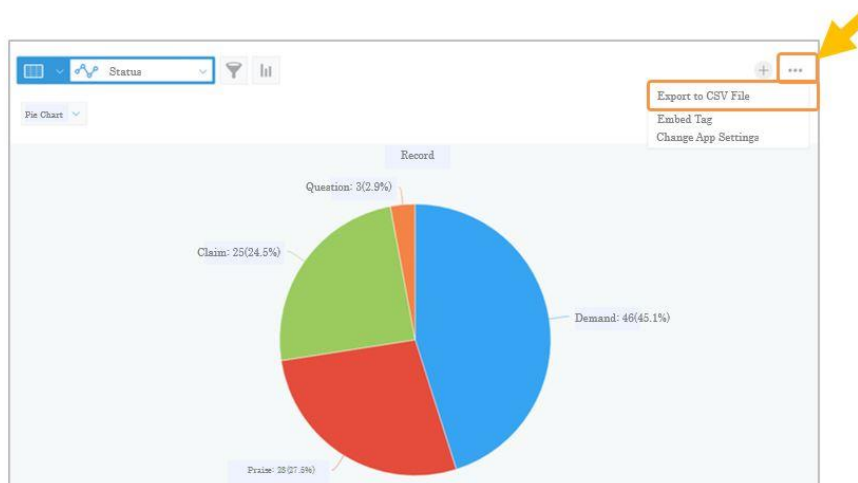
- **Export aggregation results in csv format**

Aggregation results can be exported in a CSV format.

Display the aggregation results you wish to export, and click in the order of [...(Option)] > [Export in CSV format].

※Cross tabulation charts can be exported in an Excel format.

※To export aggregation results as a file, you will need to have the authority to “export file” in the application.



## | Example uses of graphs and spreadsheets

### ● Call center management

By registering daily inquiry contents, you can aggregate correspondence time by representative name, as well as use them to grasp the percentage of inquiry contents.

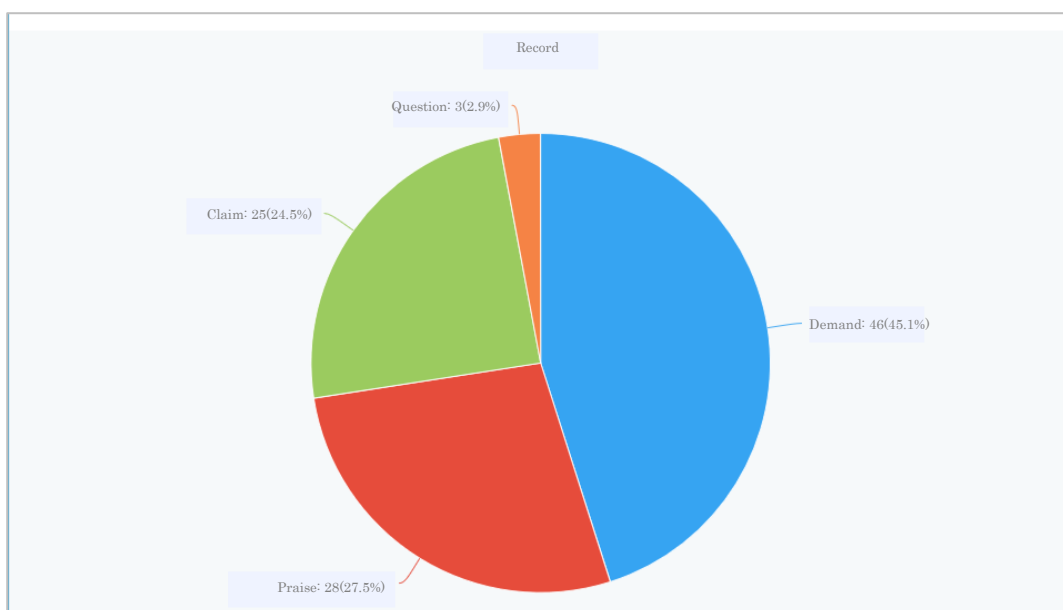
[Pivot Table – Correspondence time by representative name]

Level1: Correspondence month, days    Level2: Representative name    Aggregation method: Total, Time

Pivot Table ▾				
Date (Daily)	Jul 01, 2017	Aug 01, 2017	Sep 01, 2017	Total (Assignnee)
Assignnee	271 min	269 min	242 min	782 min
Yuta Sato	78 min	65 min	72 min	215 min
Syuichiro Sakamoto	66 min	71 min	60 min	197 min
Shinichi Sibutani	69 min	78 min	64 min	211 min
Kentaro Fukasawa	58 min	55 min	46 min	159 min

[Pie chart - Inquiry category percentage]

Level1: Inquiry category    Aggregation method: number of records



## ● Store sales report management

By each store registering its daily sales, you can ascertain information such as sales trends and what products sell the most.

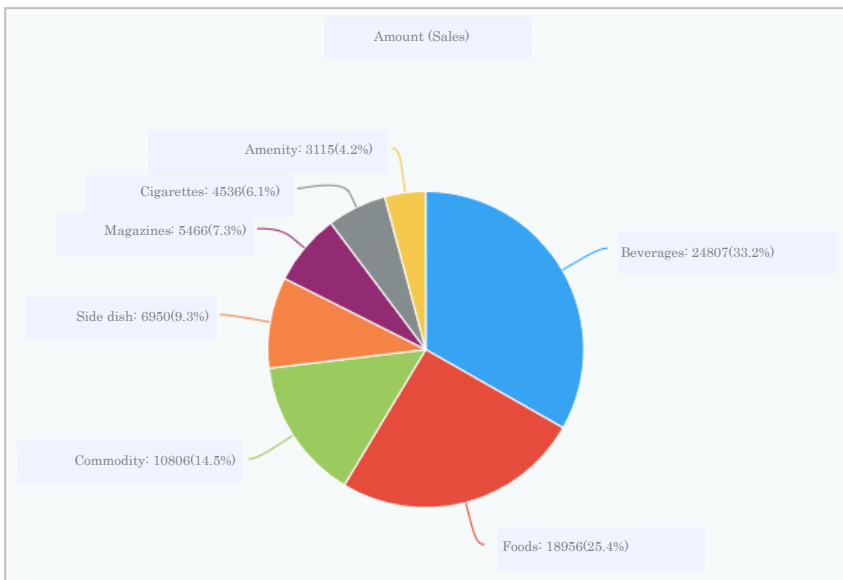
[Line chart – Checking sales trends per store]

Level1: Report date, days      Level2: Branch name      Aggregation method: Total, sales amount



[Pie chart – Sales by product category]

Level 1: Product category      Aggregation method: Total, sales volume



When using graphs, kintone automatically aggregates for you, making them extremely convenient! If you create the settings for the type of graphs you need, you can always check a variety of graphs!

