



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 processes (workflow), using the "Equipment purchase request App" as an example!

Solve
common
problems!

I want to move away from placing 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



Equipment purchasing request

Remand Approve Change Assignee 

Status: Superior currently checking [Status History](#) 

Created by  Yudai Shibutani Approver  Shinichi Sato

② Approver: Can approve with one click

① Applicant: Register request information in the form

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.



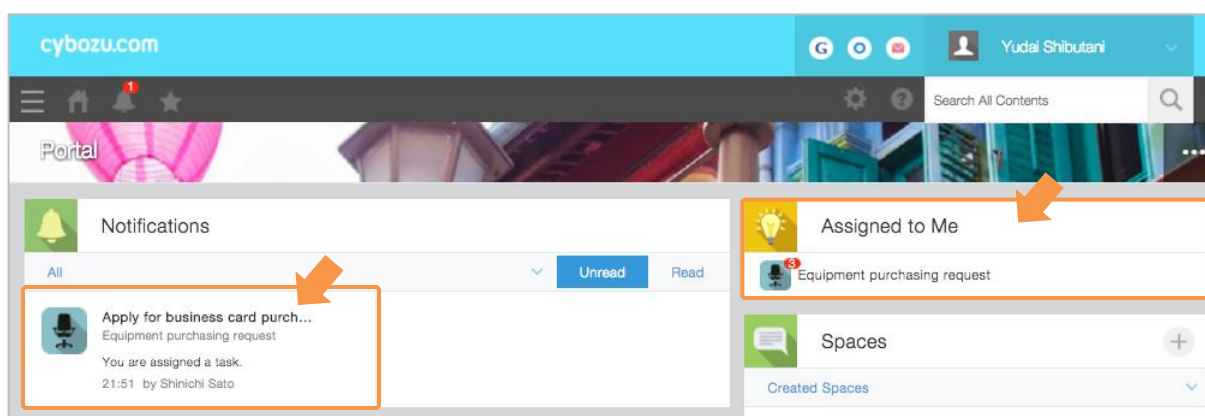
- **Major uses of process management**

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**

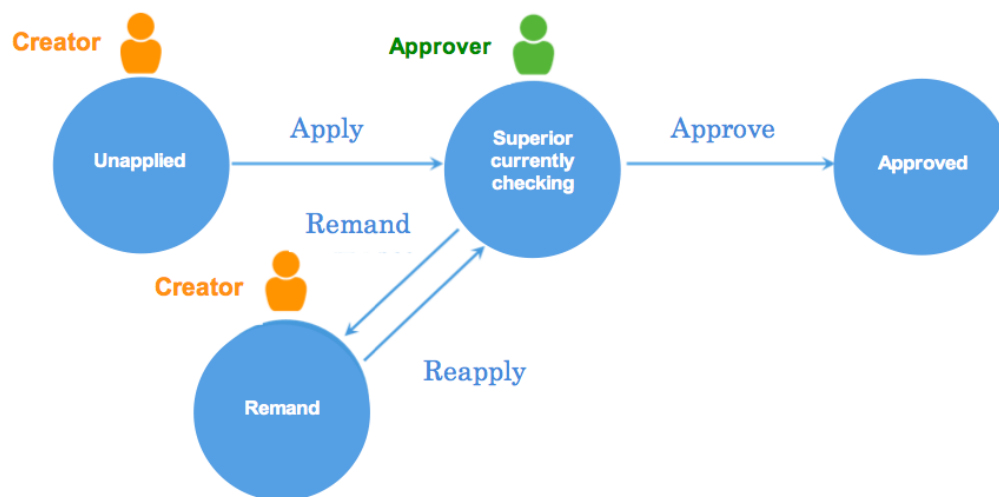
You will receive a notification when requests or work tasks that you are required to handle are registered. If you set up “email notifications,” you can also receive notification emails.

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)】

Superior

1. Enable this Feature
 - ☒ Enable process management
2. Status Settings

Set up status to define the progress of a task.

Unapplied
Initial task status

Superior currently check ☐ ☐

Remand ☐ ☐

Approved ☐ ☐
3. Process Flow Settings

Set up actions between statuses.

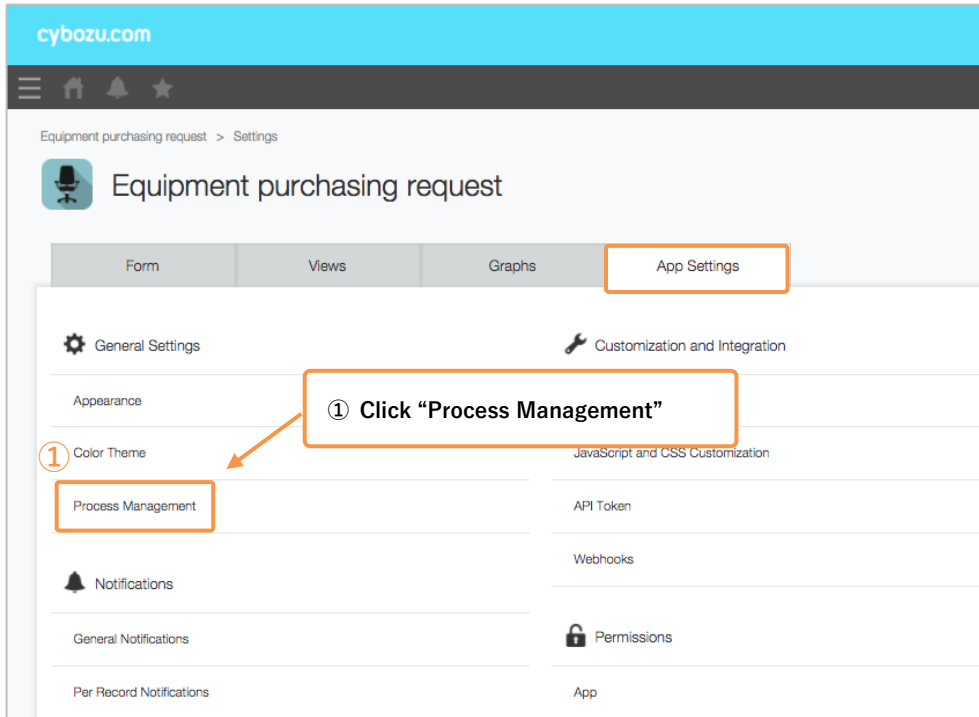
Status Before Taking Action and Who Can Take Action	Branch Criteria	Status After Action Taken	Action Name
Unapplied Initial task status Assignee List Created by	All records <input type="button" value="Clear All"/>	Superior currently checking	Apply
Superior currently checking Assignee List User chooses one assignee from the list to take action Add user, group or departme or Add a field for selection Approver	All records <input type="button" value="Clear All"/>	Remand Approved	Remand Approve
Remand Assignee List User chooses one assignee from the list to take action Add user, group or departme or Add a field for selection Created by	All records <input type="button" value="Clear All"/>	Superior currently checking	Reapply

- **1. Preparing process management**

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

① Open the settings screen for process management

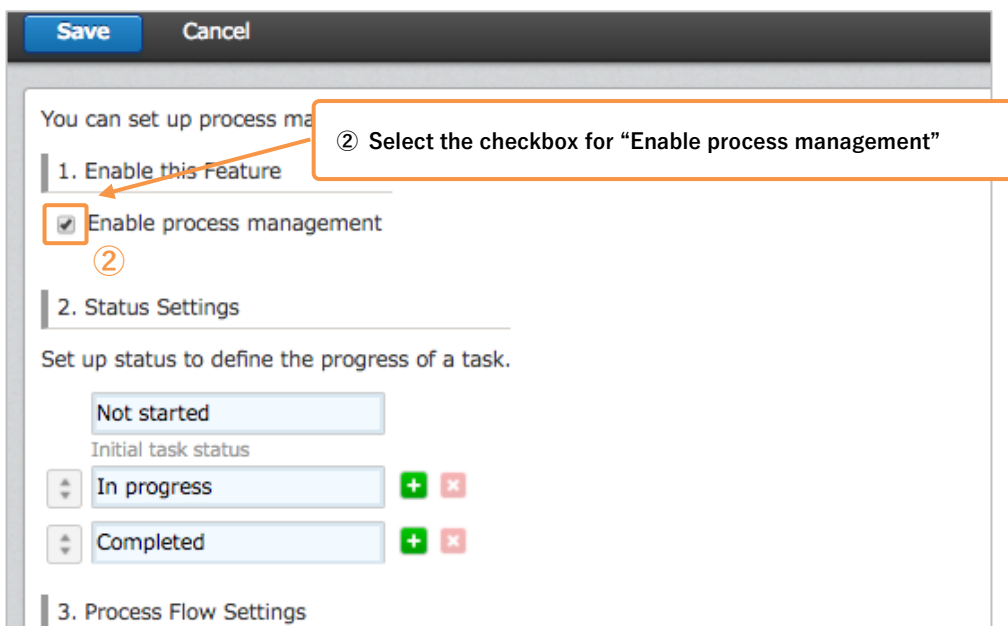
Click **“Process Management”** under “general settings” in the “App settings” tab in the “equipment purchase request App.”



② Enable process management

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

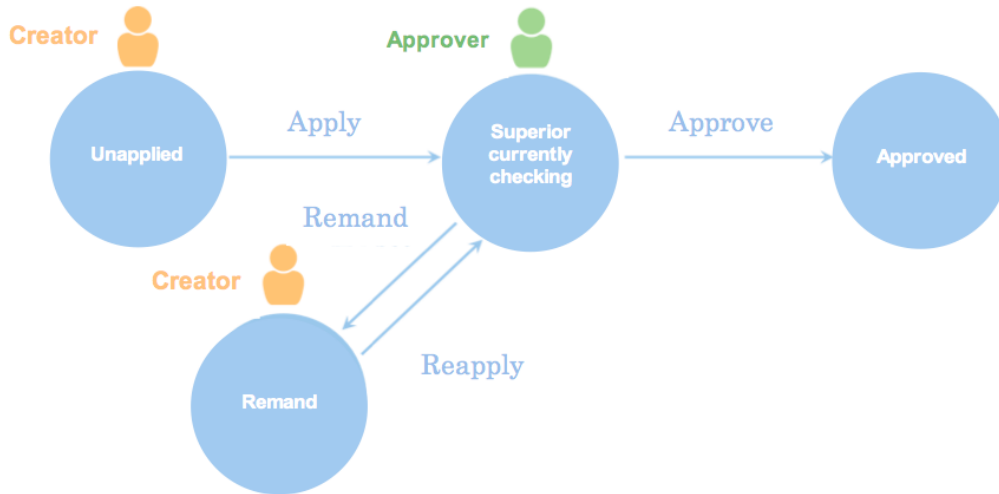
Select the checkbox for **“Enable process management”** under “1. Enable.”



• 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.

1. Enable this Feature

☒ Enable process management

2. Status Settings

Set up status to define the progress of a task.

Not started

Initial task status

In progress

Completed

3. Process Flow Settings

1. Enable this Feature

☒ Enable process management

2. Status Settings

Set up status to define the progress of a task.

Unapplied

Initial task status

Superior currently checking

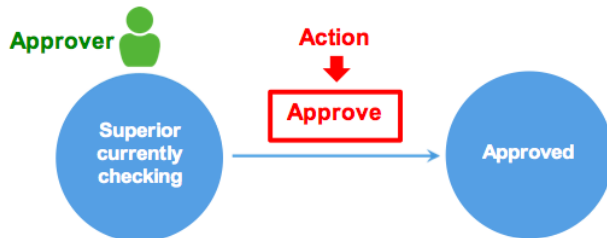
Remand

Approved

- **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**.

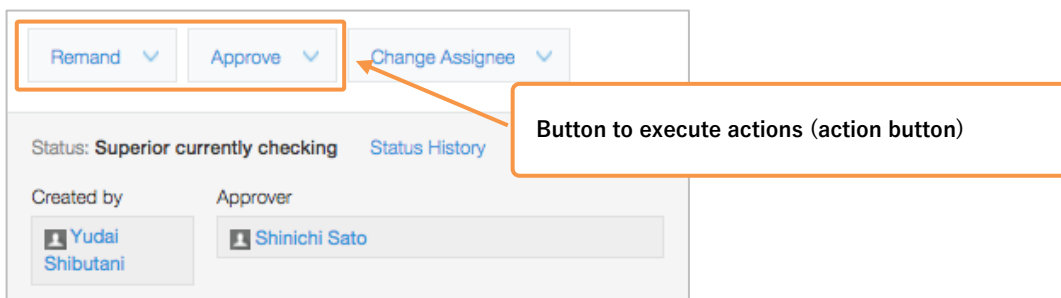
Actions are operations to change the status of records, and can be set per status. (Example: “Superior currently checking” status → Approve → “Approved” status)



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.

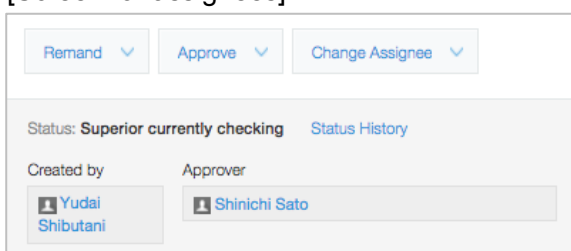
You can also set several actions to one status.



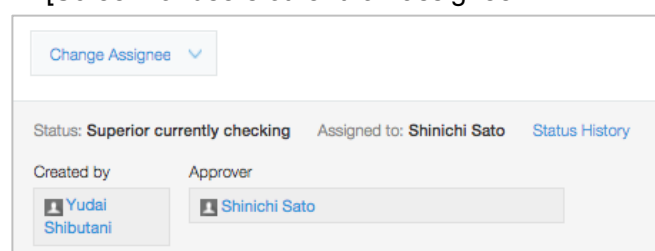
Assignees are users that can execute actions. They can also be set per status. The action button will only be displayed on the assignee’s screen.



[Screen for assignees]



[Screen for users other than assignee]



• 4. Set processes per status

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

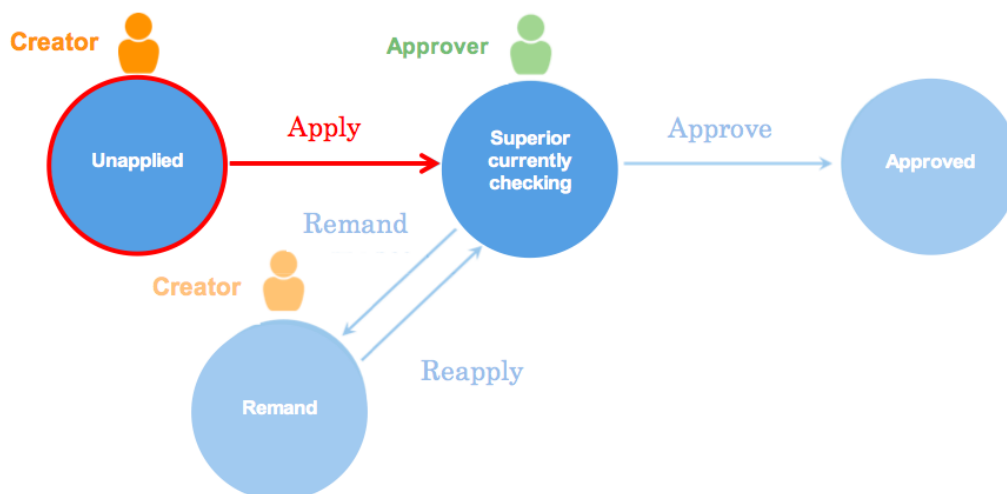
[Process completed image (settings screen)]

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.**”

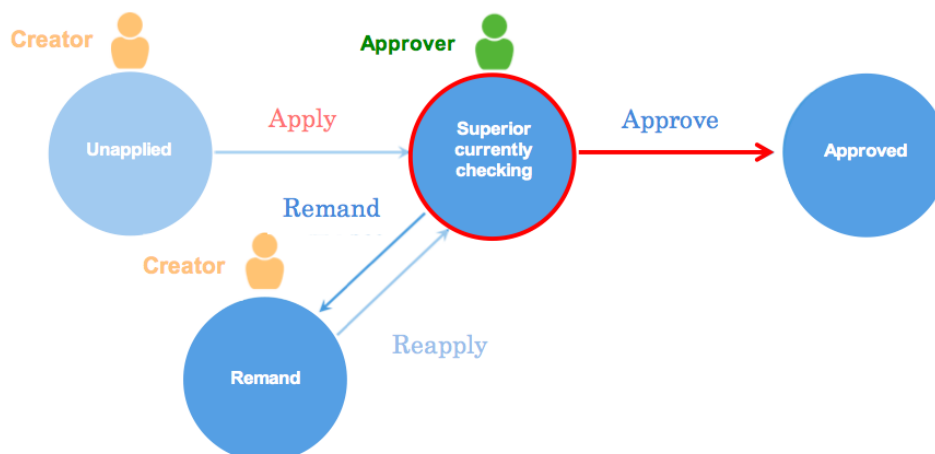
The set action name will appear on the action button

The process for the status “Unapplied” is complete.

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

• 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.**”

Unapplied

Initial task status

Assignee List

Created by

Superior currently checking

Assignee List

User chooses one assignee from the list to take a

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

Branch Criteria

Status After Action Taken

Action Name

All records

Remand

Clear All

① Select “Approver” as the assignee

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.

Clear All

All records

Remand

Clear All

selection

② Click the “+” to add an action

② Set “Status After Action Taken”

All records

Remand

Approved

selection

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.

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

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

Remand

Approve

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

Equipment purchasing request > (Assigned to me) > 3

Remand

Approve

Change Assignee

Status: Superior currently checking

Status History

Created by

Yudai Shibutani

Approver

Shinichi Sato

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

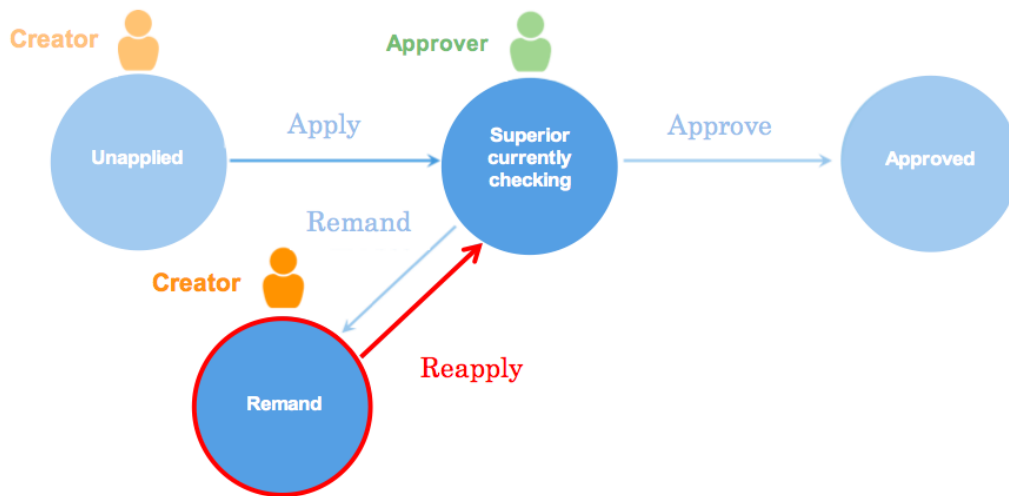
You can also create a process branch by setting two actions (approve and remand) like this example.

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.**”

The screenshot shows the 'Add a field for selection' dropdown menu. The 'Select a status.' option is selected, and the 'Remand' status is highlighted in the list. An orange box labeled '② Select "Remand"' points to the 'Remand' option. The background shows a form with 'Approver' and 'All records' fields.

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.

The screenshot shows the 'Add a field for selection' dropdown menu. The 'Add a field for selection' option is selected, and the 'Created by' option is highlighted in the list. An orange box labeled '③ Select "Created by"' points to the 'Created by' option. The background shows a form with 'Remand' and 'All records' fields.

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.**”

The screenshot shows the 'Add a field for selection' dropdown menu. The 'Add a field for selection' option is selected, and the 'Superior currently checking' option is highlighted in the list. An orange box labeled '④ Select "Superior currently checking"' points to the 'Superior currently checking' option. The background shows a form with 'Remand' and 'All records' fields.

⑤ Set the action name

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

The screenshot shows the 'Add a field for selection' dropdown menu. The 'Add a field for selection' option is selected, and the 'Reapply' option is highlighted in the list. An orange box labeled '⑤ Enter "Reapply"' points to the 'Reapply' option. The background shows a form with 'Remand' and 'All records' fields.

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

Clear All

Superior currently checking

Apply

Superior currently checking

Assignee List

User chooses one assignee from the list to take action

Add user, group or department

Add a field for selection

Approver

All records

Clear All

Remand

Remand

Approved

Approve

Remand

Assignee List

User chooses one assignee from the list to take action

Add user, group or department

Add a field for selection

Created by

All records

Clear All

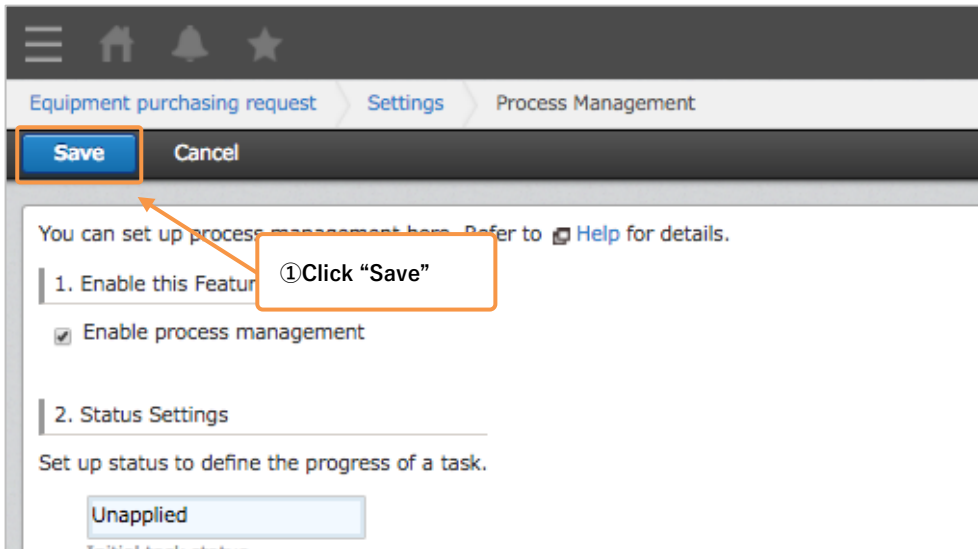
Superior currently checking

Reapply

- **5. Save your settings and update your App**

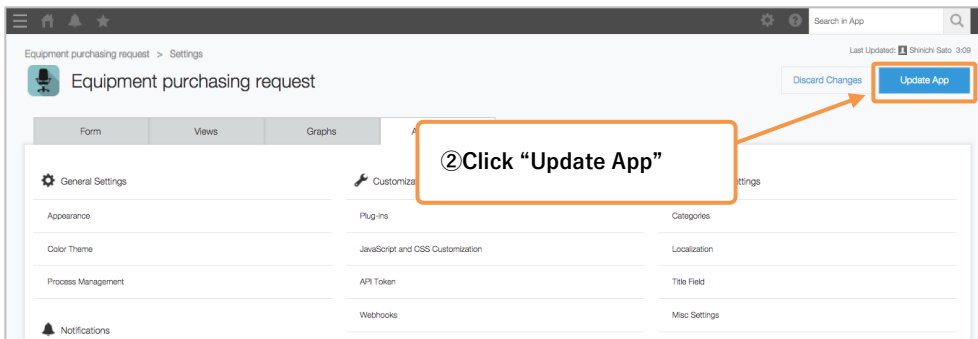
- ① Save your settings

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.

A screenshot of the application interface showing a list of records. At the top, there is a filter dropdown menu set to '(Assigned to me)' (highlighted with an orange box). Below the filter, there is a table with the following data:

Record number	Approver	Title	Total amount	Status	Assignee
6	Shinichi Sato	Apply for PC purchase	24000	Superior currently checking	Yudai Shibutani
5	Shinichi Sato	Apply for business card purchase in February	18000	Remand	Yudai Shibutani

At the bottom right of the table, it says 'Records 1 - 2 of 2'.

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.

Equipment purchasing request

Cancel Save

Created by *
Yudai Shibutani

Approver
Shinichi Sato

Title
Apply for business card purchase in February

Product name	Unit price	Quantity	Subtotal	Summary
Business card (Sales dept.)	1000 YEN	10	10000 YEN	
Business card (Sales dept.)	1000 YEN	8	8000 YEN	

③ Execute action “apply”

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

Apply Change Assignee

Next Status:
Superior currently checking

Select Assignee:
Shinichi Sato

Confirm

Quantity	Subtotal	Summary
10	10000 YEN	
8	8000 YEN	

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

Change Assignee

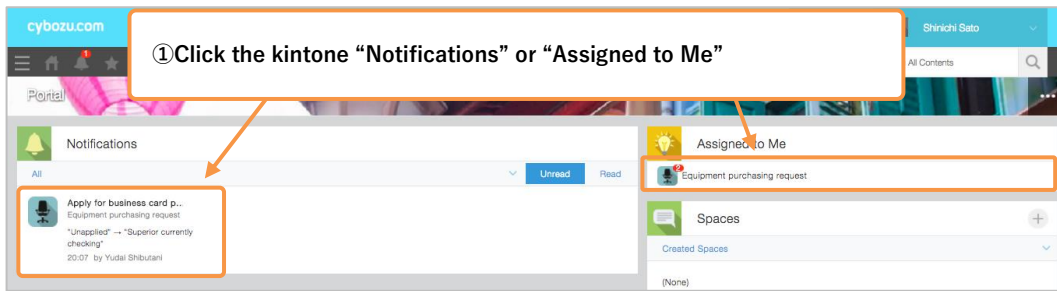
Status: Superior currently checking Assigned to: Shinichi Sato Status History

Created by
Yudai Shibutani

Approver
Shinichi Sato

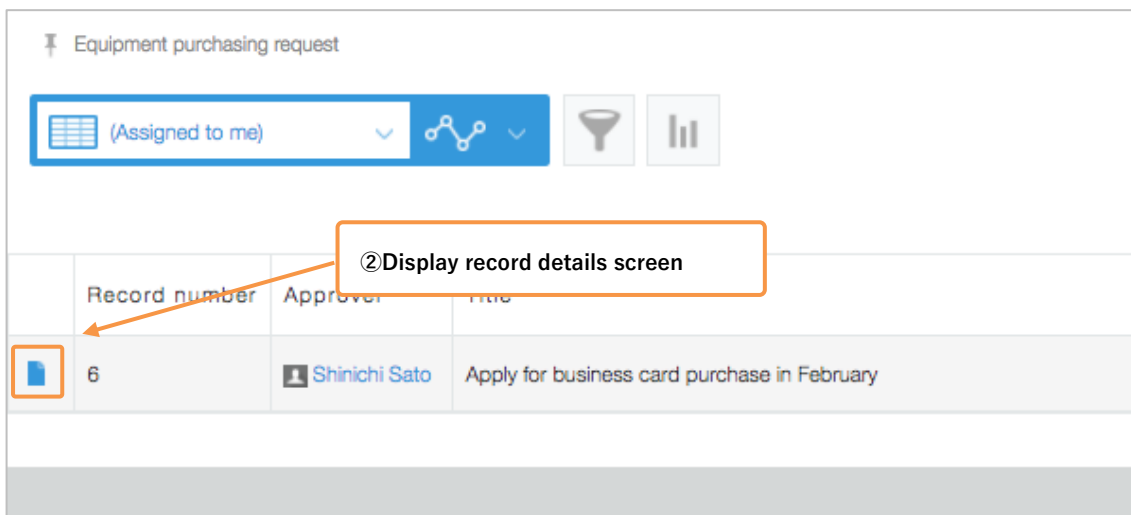
• Operating as an approver

① Confirm notifications/assigned to me and click



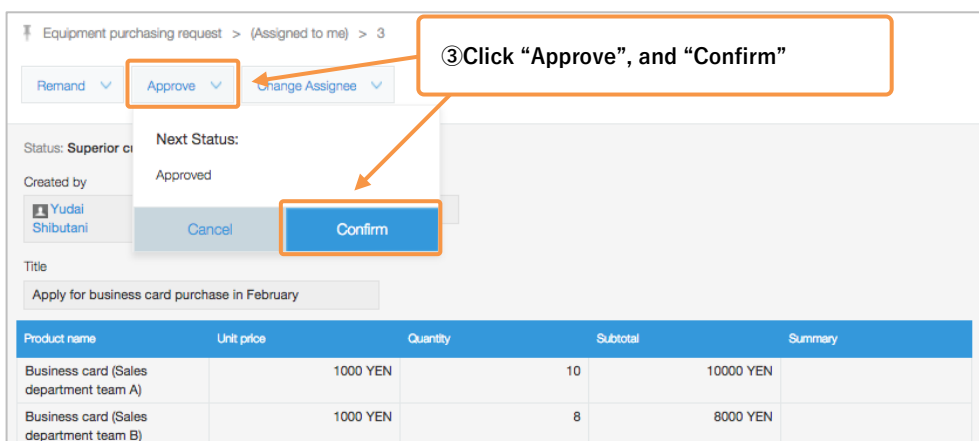
② A list of records where you are the assignee

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



③ Approve request

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





The “status” has been changed to **approved**!

Equipment purchasing request > (Assigned to me) > 3

Status: **Approved** [Status History](#)

Created by

Approver

Yudai Shibutani

Shinichi Sato

Title

Apply for business card purchase in February

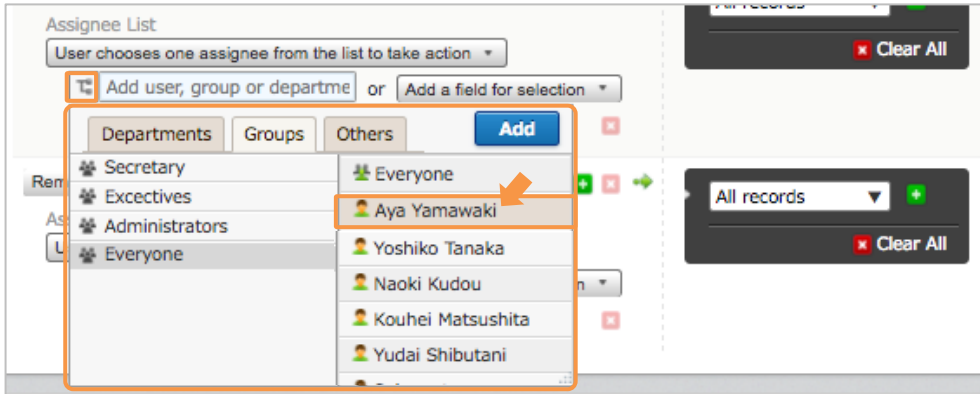
Product name	Unit price	Quantity	Subtotal
Business card (Sales department team A)	1000 YEN	10	10000 YEN
Business card (Sales department team B)	1000 YEN	8	8000 YEN

Tips

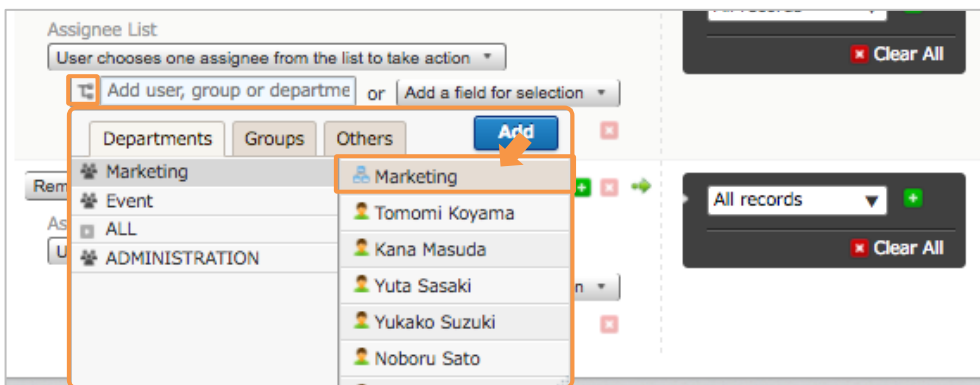
- **Set users and groups as assignee**

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]



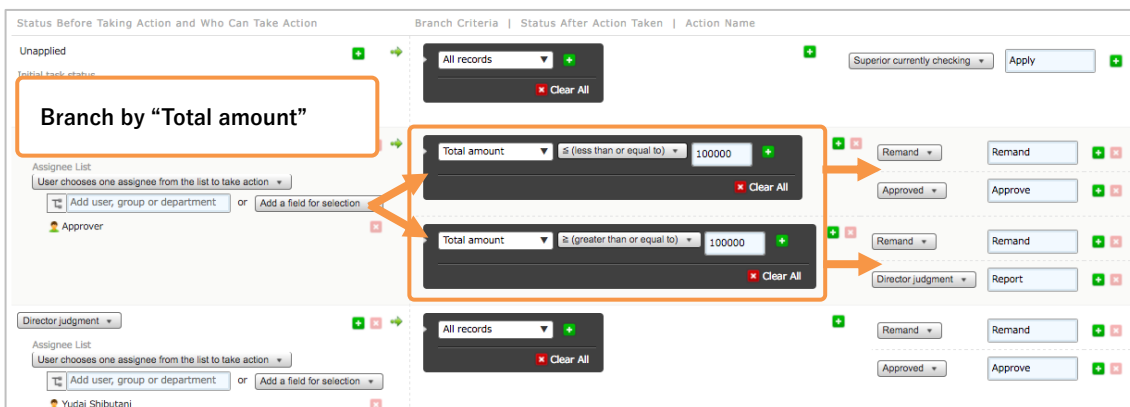
[Example: Marketing department must check]



- **Set conditional branch**

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

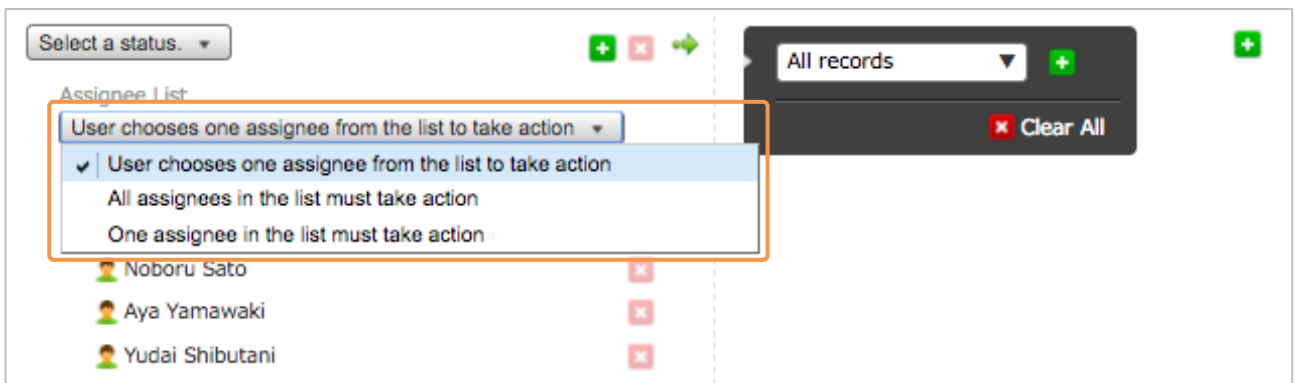
[Example: Branch from when the total amount is 100,000 yen or more (manager’s decision necessary) or below 100,000 yen (upper manager’s decision)]



- **Select “Status change rules” for when there are several assignees**

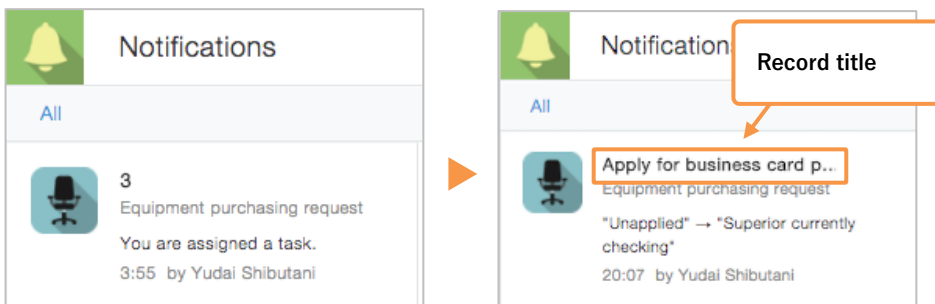
When there are multiple assignees, you can select one of the three conditions to change statuses.

- 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



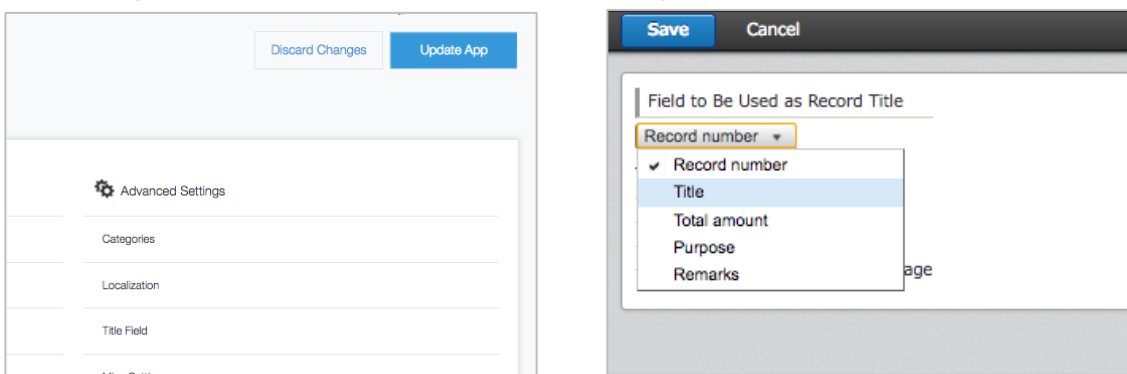
- **Change notification record title**

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]

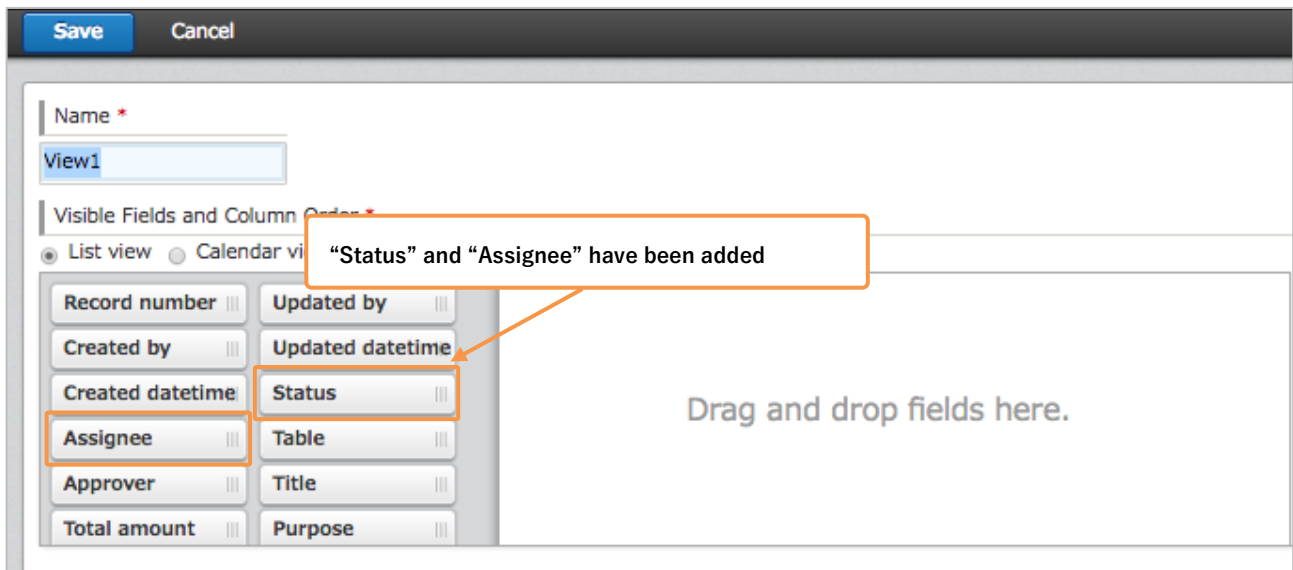
App Settings screen > Title Field (in the default settings, the titles are Record number)



- 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

Standard					
Records 1 - 20 of 44					
Title of requests	Applicant	Application date	Status	Assignee	
1 kintone	Yudai Shibutani	May 10, 2017	Waiting for secondary approval	Yukako Suzuki	
1 Temporary employment of part-time jobs in Matsuyama office	Yudai Shibutani	Apr 26, 2017	Waiting for president judgement	Takashi Chen	
1 Implement system	Yoshiko Tanaka	Apr 10, 2017	Completed		
1 Submit a proposal	Yudai Shibutani	Mar 29, 2017	Waiting for president judgement	Takashi Chen	
1 About furnishings application in conference room	Kana Masuda	Mar 02, 2017	Waiting for president judgement	Takashi Chen	

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.

The screenshot shows a web interface for a Transportation Reimbursement request. At the top, there are three buttons: 'Approve', 'Remand', and 'Change Assignee', each with a dropdown arrow. Below these buttons, the status is 'Superior currently checking' and there is a link for 'Status History'. The form fields include: Applicant (Yudai Shibutani), Employee number (123), Department (General affairs), Approver (Shinichi Sato), and Title (Transportation Reimbursement (October)). A table lists the transportation details:

Date	Destination	Transportation	Amount
May 08, 2017	Observe the office (Nihonbashi)	Train(round trip)	520
May 15, 2017	Help EXPO (International exhibition hall main gate)	Train(round trip)	360

The Total Amount is 880. On the right side, there is a comment box with the text 'Write your comment here.' and a comment from Shinichi Sato to Yudai Shibutani dated Jun 08, 2017 20:58, saying 'Well done!' with a 'Reply' button.

• 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.

The screenshot shows a web interface for a Travel Expenses Reimbursement request. At the top, there are two buttons: 'Request' and 'Change Assignee', each with a dropdown arrow. Below these buttons, the status is 'Not started' and there is a link for 'Status History'. The form fields include: Applicant (Noboru Sato), Superior (Yudai Shibutani), Period (Departure: May 10, 2017, Return: May 11, 2017), Region (Kansai), Daily allowance (1,000), Destination (Osaka), and Purpose (For user hearing in Osaka). A table lists the travel expenses:

Date	Access	Summary	Amount(YEN)	Receipt
May 10, 2017	Airplane	Flight ticket (round trip) + Accommodation	35,000	With Receipt