

How to Import Records

Example: Here is where we can import job data. Click "Job" in the global menu, and select "Import Job" from the drop-down menu.

Import can be performed from each global menu item (see reference table below). When import is performed from lower menus, upper level data can be imported at the same time.

	Client	Recruiter	Job	Person	Resume	Sales	Process	Activity
Client	●	●	●	-	-	-	-	● One importable data item + Activity
Recruiter	-	●	●	-	-	-	-	
Job	-	-	●	-	-	●	-	
Person	-	-	-	●	●	-	-	
Resume	-	-	-	-	●	●	-	
Sales	-	-	-	-	-	●	●	
Process	-	-	-	-	-	-	●	
Activity	-	-	-	-	-	-	-	●

- ※ There is a possibility that the screen image might change.
- ※ In this manual, the default menus displayed are the default settings.
To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

The screenshot displays the PORTERS HR-Business Cloud interface. A modal dialog box titled "Job - Import (1/4)" is open, showing "File Settings". The first step is "1. Select the file to be imported". A "Select File" button is highlighted with a blue border. A green callout bubble points to this button with the text "Click 'Select File'". Below the button is a "Selected file:" label. At the bottom of the dialog are "Back", "Next", "Run", and "Cancel" buttons. The background shows a sidebar with "Home", "Customize the calendar", and a calendar grid for Sun 10/26. The top navigation bar includes "Client", "Recruiter", and "Job" tabs. The top right corner shows the user name "Catherine Porters" and "Apps" menu.

PORTERS HR-Business Cloud

The file selection box will open. Select the file you wish to import (CSV format) and click Open.

7:00
8:00
9:00
10:00
11:00

Back Next Run Cancel

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Client Recruiter Job

Job List (3) Filter

Open(2) Close(0)

Sample Job 03

Matching >> Job Sent 1 >> Recomm

Pos

Salary De

Work Loca

Permis

Job Ov

Sublist

Sample Job 01

Matching 1 >> Job Sent >> Recomm

Pos

Salary De

Work Loca

Permis

Job Ov

Sublist

Sample Job 02

Matching 1 >> Job Sent >> Recomm

Pos

Salary De

Work Loca

Permis

Job Ov

Sublist

Job - Import (1/4)

File Settings [Help](#)

1. Select the file to be imported

Select File

Selected file: test.csv

Column 1	Column 2
Client ID	Recruiter ID
123	456

2. File Options

The first line is the

Character code

· If you observe garbled characters, you may need to change the character code.

3. Select import method

New import

Back **Next** Run Cancel

Select import method and click next.

Here, to set new import settings select "New Import".

⌘ If you have imported data previously, the previous import settings will be automatically stored in HRBC and displayed as an import settings option.

When an import is performed, the settings are preserved so if you perform frequent imports there is no need to set the import settings each time.

Job - Import (2/4)

Import Settings Help

1. Enter import name

test

Available to all users
 Available to only the current user

2. Setup import method

- Drag and drop [CSV File Items] to [HRBC Items]
- Convert data to be imported by clicking the [Filter] button.

CSV File Items → HRBC Items

Client ID
Recruiter ID
JOB ID
Work Location

Client

Basic Information

Client ID Filter
Client Name Filter
Client Owner Filter
Memo Filter
Zip Code (Client) Filter
Address (Client) Filter

Back Next Run Cancel

When performing a new import, enter a name.

Select if you would like to allow your import settings to be shared among all users in your company, or for your personal use only.

Job - Import (2/4)

Import Settings

1. Enter import name

test

Available to all users
 Available to only the current user

2. Setup import method

- Drag and drop [CSV File Items] to [HRBC Items]
- Convert data to be imported by clicking the [Filter] button.

CSV File Items → HRBC Items

CSV File Items	HRBC Items
Client ID	Client
Recruiter ID	Basic Information
JOB ID	Client ID
Work Location	Client Name
	Client Owner
	Memo
	Zip Code (Client)
	Address (Client)

Back Next Run Cancel

When you have finished all mapping settings, click "Next".

Drag and drop the items you wish to import from the left side to the right side of the screen.

If the item list becomes too long, click the heading with the downward arrow to collapse its contents.

✂ You can also use the scroll bar to navigate the list.

Job - Import (3/4)

Duplicate Record Settings

1. Select key item to verify duplication of records

Client
 ID Company Name and Telephone Number Others

Recruiter
 ID Others

Job
 ID Others

2. Choose how to process duplicate records.

Important
-Overwritten records changes cannot be undone
-It is the responsibility of the user to back up information by using the "Export" feature

Import as a new record when the key field is not found

If the key field is found

Overwrite if a record exists (Do not import blank values)
 Overwrite if a record exists (Import blank values)
 Always create a new record even if the record exists

Back **Next** Run

To check if there is duplicate data in the CSV you will import and the data already registered in HRBC, please set the key items.

✘If you are performing an import in order to update existing data, we recommend that you overwrite by ID.

If you are performing an import to overwrite for data maintenance, uncheck the box to avoid the risk of registering a new record. (In case you are registering a new record, leave the box checked).

In the case there is mostly duplicate data, select overwrite settings here.

When you have finished adjusting the settings, click "Next".

[Supplemental Info] Correct Flag Setting for Importing Duplicate Records

- For initial migration, where data does not already exist in HRBC
- When existing and new data are mixed in the CSV, taking in the new data and updating existing data at the same time



2. Choose how to process duplicate records.

Important

-Overwritten records changes cannot be undone

-It is the responsibility of the user to back up information by using the "Export" feature

Import as a new record when the key field is not found

If the key field is found _____

- When existing and new data are mixed in the CSV, taking in only the new data and not overwriting existing data



2. Choose how to process duplicate records.

Important

-Overwritten records changes cannot be undone

-It is the responsibility of the user to back up information by using the "Export" feature

Import as a new record when the key field is not found

If the key field is found _____

- Maintenance for existing data, without creating new items



2. Choose how to process duplicate records.

Important

-Overwritten records changes cannot be undone

-It is the responsibility of the user to back up information by using the "Export" feature

Import as a new record when the key field is not found

If the key field is found _____

Job - Import (4/4)

The import preparation is complete Help

1. Choose validation options for import
 - Perform validation on import (The records that fail the validation will not be imported)
 - Do not perform validation on import
2. Click "Run" button

When the import starts, the import icon will appear on the...
The import process will be performed in the background...
You can check the import status by clicking the import icon...
Please be careful as some errors may occur if updating or regist...

For example, when importing items with entry restrictions such as phone numbers or URLs, if there are data items to which the restriction applies that you don't want to be excluded from import due to error, please select "Don't perform error check during import".

※In the case of importing selection option data, even if you check "Don't perform error check during import", and the selection options of the imported data don't match the existing selection options in HRBC an error will occur and the corresponding record will not be entered.

When you have finished adjusting the settings, click "Next".

Back Next Run Cancel

PORTERS HR-Business Cloud

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the logo 'PORTERS' is followed by 'HR-Business Cloud'. A navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. Below this, a 'Job List (3)' section features a 'Filter' button and 'Add New Job' and 'Bulk Action' buttons. A 'Customize View' link is also present. The main content area shows a list of job entries, each with a 'Sublist' button and a progress indicator. The first job, 'Sample Job 03', is selected, and its details are shown in a table format. A modal dialog box titled 'PORTERS' is overlaid on the screen, containing the text: 'The import has started. You can review the progress and result by clicking on the icon in the top right corner and choosing import.' Below the text is an 'OK' button. A yellow callout bubble points to the 'OK' button with the text 'Click "OK".'

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action Customize View

Open(2) Close(0)

Sample Job 03

Matching » Job Sent 1 » Recommend » 1st Interview » 2nd Interview » Decision » Offer »

Client	Sample Client 01	Phase	
Position	Sample Job 03	Phase Date	
Salary Details	Sample Salary Details	Phase Memo	
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

Sample Job 01

Matching 1 » Job Sent » Recommend » 1st Interview 1 » 2nd Interview » Decision » Offer »

Client	Sample Client 01	Phase	
Position	Sample Job 01	Phase Date	
Salary Details	Sample Salary Details	Phase Memo	
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

Sample Job 02

Matching 1 » Job Sent » Recommend » 1st Interview » 2nd Interview » Decision » Offer »

Client	Sample Client 02	Phase	Open
Position	Sample Job 02	Phase Date	2014/05/16 00:00:00
Salary Details	Sample Salary Details	Phase Memo	Sample Phase Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

PORTERS

The import has started. You can review the progress and result by clicking on the icon in the top right corner and choosing import.

OK

Click "OK".

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action Customize View

Open(2) Close(0)

Sample Job 03 Matching » Job Sent 1 » Recommend » 1st Interview » 2nd Interview » Decision » Offer »

Client	Sample Client 01
Position	Sample Job 03
Salary Details	Sample Salary Details
Work Location	Tōkyō
Permission	Publish (Real Name)
Job Owner	N/A Catherine Porters

Sublist

Sample Job 01 Matching 1 » Job Sent » Recommend » 1st Interview 1 » 2nd Interview » Decision 1 » Offer »

Client	Sample Client 01	Phase	Open
Position	Sample Job 01	Phase Date	2014/05/16 00:00:00
Salary Details	Sample Salary Details	Phase Memo	Sample Phase Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

Sample Job 02 Matching 1 » Job Sent » Recommend » 1st Interview » 2nd Interview » Decision » Offer »

Client	Sample Client 02	Phase	Open
Position	Sample Job 02	Phase Date	2014/05/16 00:00:00
Salary Details	Sample Salary Details	Phase Memo	Sample Phase Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

When bulk operation is performed, an icon will appear at the upper right of the screen. While the import is processing, the icon is orange.

*In the event that the number of import items is large, it may take time for the icon to appear.

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action

Open(2) Close(0)

Sample Job 03

Matching » Job Sent 1 » Recommend » 1st Interview » 2nd Interview » Decision » Offer »

Client	Sample Client 01	Phase	
Position	Sample Job 03	Phase Date	
Salary Details	Sample Salary Details	Phase Memo	
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

Sample Job 01

Matching 1 » Job Sent » Recommend » 1st Interview 1 » 2nd Interview » Decision 1 » Offer »

Client	Sample Client 01	Phase	
Position	Sample Job 01	Phase Date	00:00:00
Salary Details	Sample Salary Details	Phase Memo	se Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

Sample Job 02

Matching 1 » Job Sent » Recommend » 1st Interview » 2nd Interview » Decision » Offer »

Client	Sample Client 02	Phase	Open
Position	Sample Job 02	Phase Date	2014/05/16 00:00:00
Salary Details	Sample Salary Details	Phase Memo	Sample Phase Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Sublist

Job - Import Complete
 Start time 2014/10/28 16:45
 End time 2014/10/28 16:45
[Confirm results](#)

When finished the icon will turn green. You can check the results of the import by clicking the icon.

PORTERS HR Business Cloud

Import Result

Start Time: 2014/10/28 16:45
End Time: 2014/10/28 16:45
Number of records imported: 0
Number of records failed: 1

The import results are displayed in a separate window.

CSV Row	HRBC Field	HRBC Type	Code	Error	Imported Content
2	Client Name	Text	116	This Field is required	

In case there are errors with certain data during import, the erroneous line of data (record) will not be imported, and the error location and cause will be displayed. Therefore you can edit the data and perform an import again.

*In the above error, the 4th line in the CSV file, called "Employment Type", is an Option Selection type item set with the with the option "Part time" selected, while in HRBC there is no corresponding selection option, and furthermore, at the time of import, mapping to existing selection options was not set, so an error occurred.