

# Dashboard

# ① Dashboard

Using the Dashboard, checking the count and trend of Job/Resume/Process is now possible.

This is the feature to check the company's KPI (Key Performance Indicator).

# ② Opening/Closing the Dashboard

In the top page or in resource list view, the Dashboard can be opened by clicking the Dashboard icon located at the left side of the screen.

In order to close, please click the icon again.

# ③ Role

Each part of the Dashboard is explained below.


Dashboard is divided into 3 main parts.

A : Phase history total count display in specific period.

B : Latest phase total count display

C : Phase history total count graph in specific period.

※There are 2 ways to update to the latest information (Per Screen):

- (1) Click the  button.
- (2) Change the settings and save

# ④ Preconfigured

Each user needs to configure in the Settings screen.

Settings method is available on the next page.

※The settings depends on the browser and the PC environment.

The screenshot shows the PORTERS HR-Business Cloud Dashboard. At the top, there's a navigation bar with 'ent Recruiter Job Person Resume Process Sales Activity Report'. Below it, a period selector shows 'Period [This year] [My Departments records]' and a date '2015/12/08 16:24'. A 'Settings' button is in the top right corner.

The main dashboard area is divided into three sections:

- Job:** A table with columns 'Open' (1), 'Close' (0), 'Resume Entry' (0), 'Resume Open' (1), 'Resume Close' (0), 'Process Matching' (0), and 'Job Sent' (11). A circled '3' is next to the 'Resume Entry' value.
- Resume:** A table with columns 'Recommend' (2), '1st Interview' (0), '2nd Interview' (0), 'Decision' (0), and 'Offer' (0). A large 'A' is overlaid on this section.
- Process:** A table with columns 'Matching' (0), 'Job Sent' (2), 'Recommend' (1), '1st Interview' (0), '2nd Interview' (0), 'Decision' (0), and 'Offer' (0). A large 'B' is overlaid on this section.

Below these is the 'Current Phase' section, which contains three sub-tables for 'Job', 'Resume', and 'Process', each with a 'Settings' button and a refresh icon. A large 'C' is overlaid on the 'Process' sub-table.

At the bottom is a 'Graph [This year] [Stacie]' showing a line chart of 'Phases' over 'Dates' from 2011 to 2015. A large 'C' is overlaid on the graph area.


On the left side, there is a sidebar with a 'Mail' icon and a 'Dashboard' icon. A circled '2' is next to the 'Dashboard' icon.

At the bottom of the dashboard, there are checkboxes for 'Show Job', 'Show Resume', and 'Show Process'. Under 'Show Process', there are also checkboxes for 'Matching', 'Job Sent', and 'Recommend', all of which are checked.

## Settings : A Phase history total count display in specific period.

Search criteria such as record owner, period (“This week” or “This month” or “This year” or “custom range”), and the target phase to display are selected in the Setting screen. Using the criteria in the settings, the total count is computed from the phase history and displayed.

If you click the [Settings] button, the Settings screen will be displayed.

If you click the  button the information is updated to the latest and the updated time is displayed on the left side.

① Select the owner of the record to aggregate.

② Select the aggregation period.

This week : Total for this week  
 This month: Total for this month.  
 Year : Total for this year.  
 Custom range: The period range selected by the user.

③ Select the target phases to aggregate.

【 Settings screen 】

**Settings**

Aggregate by record owner

My records  
 My Departments records  
 Other user`s records (Choose)

\* Process ownership constraints will be applied against the following resources  
 Job  Resume  Process  Client

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Choose an period

Interval

This week (Sunday to Saturday)  
 This week (Monday to Sunday)  
 This week (Saturday to Friday)  
 This month  
 This year  
 Custom range  
 From  To

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Choose Phases

Job


Show	Phase
<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Close

Resume

Show	Phase
<input checked="" type="checkbox"/>	Entry
<input checked="" type="checkbox"/>	Open

Save Cancel

【 Dashboard screen 】

Period [This year] [My Departments records] (2015/12/08 16:24)  Settings

Job		Resume		Process		
Open	Close	Entry	Job Sent	Recommend	1st Interview	2nd Interview
<b>1</b> <small>(3)</small>	<b>0</b> <small>(3)</small>	<b>0</b> <small>(1)</small>	<b>11</b> <small>(8)</small>	<b>2</b> <small>(2)</small>	<b>0</b> <small>(1)</small>	<b>0</b> <small>(0)</small>

You may select the time period by week, month, or year, and that period is displayed in ( ) parenthesis  
 For ex.: If the time period is set to “This week”, the ( ) parenthesis will have the total number of registered phases from last week in cumulative.

※ This will not appear in case of fixed input value.

## Settings : B Latest phase total count display

Search criteria such as record owner and the target phase to aggregate is selected in the Settings. Using that criteria, the total count is computed from the phase history and displayed.

If you click the link, the relevant data in list view will be displayed on separate tab.

※ To use the Dashboard functionality, please set the "Use Search" of the fields below.

If the "Use Search" is not set, clicking the link will display an error.

Target Fields

JOB:Phase, Job Owner

RESUME:Phase, Resume Owner

PROCESS:Phase, Process Owner, End Flag

※ The ( ) will have the latest total number information, but if you click the link, the information displayed on the list view are all latest.

① Select the owner of the record to aggregate.

② Selected the target phase to aggregate.

③ In order to get the count of unique related info/ resource, please check this to be one of the axis.

For ex.: In same Client, if there are 2 Jobs in Closed Phase, it will show as the right image:

[Close] Count:3 Client:2

【 Setting screen 】

**Current Phase Settings**

Aggregate by record owner

My records

My Departments records

Other user's records (Choose)

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Choose Phases

Show	Phase
<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Close

---

Unique count by resource:

Client

Save    Cancel

【 Dashboard screen 】

Job [My Departments records] Settings

(2015/12/10 09:56) ↻

Phase	Count	Client
Open	1	1
Close	3	2

## Settings : C Phase history total count graph in specific period.

Search criteria such as record owner, period ("This week" or "This month" or "This year"), and the target phase to display are selected in the Setting screen. Using the criteria in the settings, the total count is computed from the phase history and displayed.

① Select the owner of the record to aggregate.

② Select the aggregation period and display the graph.

**This week:**  
Display the weekly total of the last 14 weeks.

**This month:**  
Display the quarterly total of the last 4 quarters.

**Quarter:**  
Display the monthly total of the last 12 months.

**This year:**  
Display the yearly total of the last 4 years.

② Select the target phase for the graph.

【 Setting screen 】

**Graph Settings**

Aggregate by record owner

My records

My Departments records

Other user`s records (Choose) 🔍

\* Process ownership constraints will be applied against the following resources

Job  Resume  Process  Client

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Choose an period

Interval

This week (Sunday to Saturday)

This week (Monday to Sunday)

This week (Saturday to Friday)

Quarter (Jan. - Mar. / Apr. - Jun. / Jul. - Sep. / Oct. - Dec.)

Quarter (Feb. - Apr. / May. - Jul. / Aug. - Oct. / Nov. - Jan.)

Quarter (Mar. - May. / Jun. - Aug. / Sep. - Nov. / Dec. - Feb.)

This month

This year

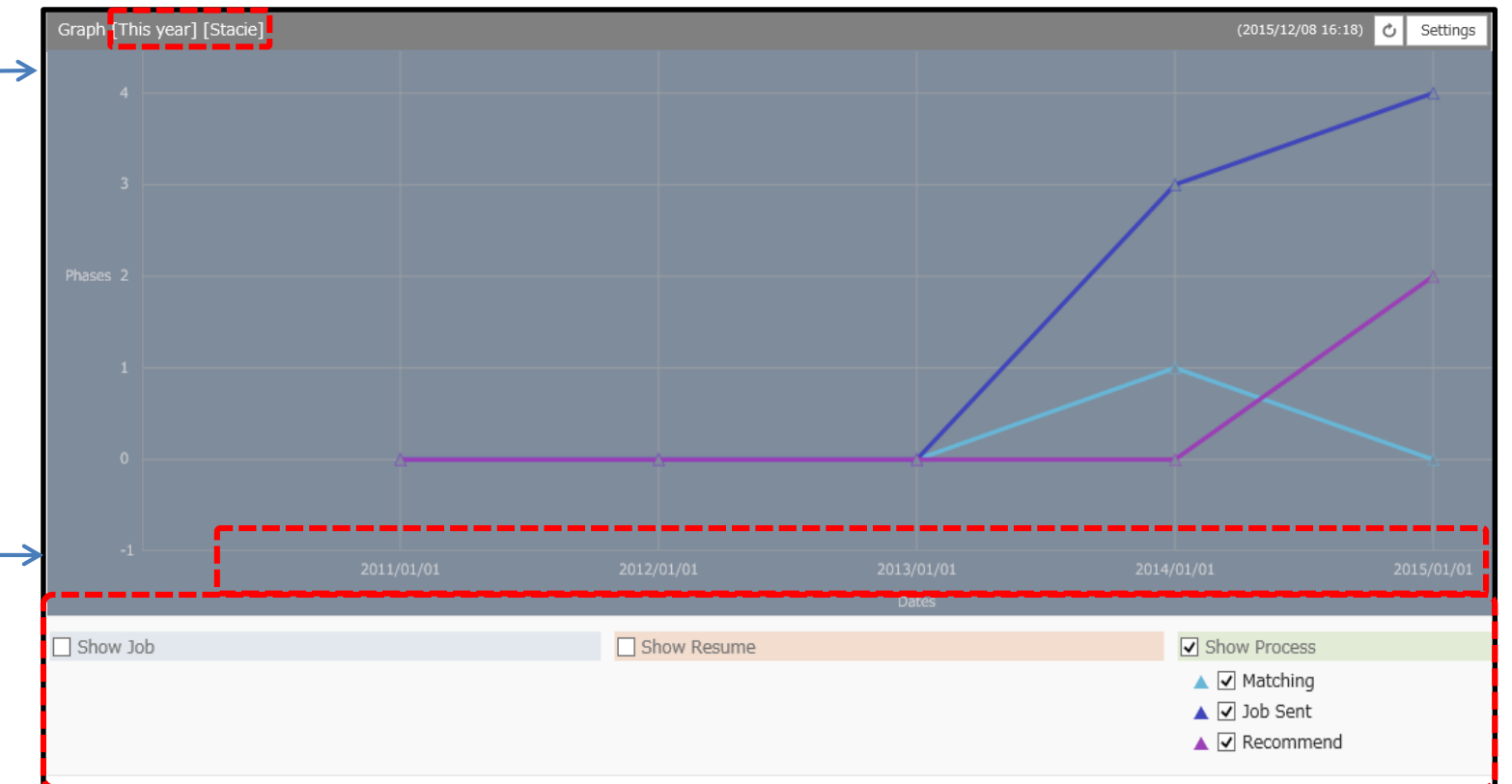
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Choose Phases

Job

Show	Phase
<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Close

【 Dashboard screen 】



Checkbox will not be shown on the Phase Option in case if the corresponding data has 0 count, regardless if it is set to display on the Settings Screen.