

How to Create a Report (Graph)

This guide will demonstrate how to create a Sales Report

The screenshot shows the PORTERS HR-Business Cloud interface. At the top, there is a navigation bar with the following items: Client, Recruiter, Job, Person, Resume, Sales, Process, Activity, and Report. The 'Report' menu is currently open, showing 'Report (Beta)'. Below the navigation bar, there is a 'Home' section. On the left, there is a calendar view for May 11, with a 'Customize the calendar' button and a '+'. The calendar shows a grid of days from Sun 5/11 to Sat 5/17. On the right, there is an 'Information' section with a 'Refresh' button and a 'See More...' link. Below that is a 'Helpdesk' section with contact information: 06-5829 (Mon-Fri 9:00-18:00), support@porters.jp, User Support Page, information about the sessions, or request additional services, and a contact number: +81-3-6432-9829. A green callout box with a pointer to the 'Report (Beta)' option contains the text: 'Click "Report" on the global menu, and click "Report(Beta)"'. The calendar view shows two orange blocks: '10:00 - 12:00 Sample Title' and '13:00 - 14:00 Sample Title'.

- ※ 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 shows the PORTERS HR-Business Cloud interface. At the top, there is a navigation bar with the PORTERS logo, a trial expiration notice, and user information. Below this is a menu bar with options like Client, Recruiter, Job, Person, Resume, Sales, Process, Activity, and Report. The main content area is divided into two sections: 'Folder' and 'Progress Report(For General User)'. The 'Folder' section has an 'Add Folder' button highlighted with a blue box. Below it, a folder named 'Progress Report' is visible with edit and delete icons. The 'Progress Report' section has an 'Add Report' button and a table of reports. A green callout box points to the 'Add Folder' button with the text: 'In order to make a folder to save this report in, click “Add Folder”.' At the bottom of the interface, there are links for 'Terms of Agreement' and 'About PORTERS HR-Business Cloud', and a copyright notice.

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Client Recruiter Job Person Resume Sales Process Activity Report

Folder

Add Folder

Progress Report

Progress Report(For General User)

Add Report

+ Graph	Sales Opportunities (Sample)	Updated By	Catherine Porters	Date Updated	2014/5/16 13:23	
+ Graph	Selection Process (Sample)	Updated By	Catherine Porters	Date Updated	2014/5/16 13:23	
+ Graph	New Applicant (Sample)	Updated By	Catherine Porters	Date Updated	2014/5/16 13:23	
+ Graph	New JOB (Sample)	Updated By	Catherine Porters	Date Updated	2014/5/16 13:23	

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In order to make a folder to save this report in, click “Add Folder”.

※As of 3 September 2013, the sample reports above are available as presets.

In the “Add Folder” dialog box, please enter the “Folder Name”.

In “Common Settings”;

If you are the only person who will use the folder, please select “For Personal Use”.

If everyone in your company will use the folder, please select “Common”.

When finished, please click “Save”.

The screenshot shows the PORTERS HR-Business Cloud interface. At the top, there is a navigation bar with the PORTERS logo and a trial expiration notice. Below the navigation bar, there are several menu items: Client, Recruiter, Job, Person, Resume, Sales, and Process. The main content area displays a list of folders, including 'Progress Report'. A dialog box titled 'Add Folder' is open in the foreground. The dialog box has a 'Folder Name' field with the text 'Monthly report' entered. Below this, there are 'Common Settings' with two radio buttons: 'For Personal Use' and 'Common'. The 'Common' radio button is selected. At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons. A green callout box points to the dialog box with instructions.

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Client Recruiter Job Person Resume Sales Process Activity Report

Folder

Add Folder

Progress Report

Monthly report

Monthly report(For General User)

Add Report

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Please select the folder you added, and click "Add Report".

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Report Name

Enter report name

Report Name

In the “Add Report” window, please enter a name in the “Report Name” field, and click “Next”.

Back Next Save Cancel

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Report Category

Select report category.

- Client
- Contract
- Recruiter
- Job
- Person
- Resume
- Process
- Sales

Back Next Save Cancel

Please select "Report Category" in the "Data Source" tab.

To follow this example, please select "Sales" and click "Next".

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Report Fields

Select items to be displayed in report from category fields.
Drag and drop from selection area of left side to the right side of page

Selected Fields	Available
	▶ Client
	▶ Recruiter
	▶ Job
	▶ Person
	▶ Resume
	▶ Sales

Back Next Save Cancel

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In the "Fields" tab, please click "Sales" to display available candidate items in the category field.

Add Report

Drag and drop from selection area of left side to the right side of page

Selected Fields

Available

- Client
- Recruiter
- Job
- Person
- Resume
- Sales (21)
 - Sales ID
 - Sales Amount
 - Record Date
 - Billing Client Name
 - Billing Division
 - Billing Title
 - Billing Name

Back Next Save Cancel

Please move the required items for this report to "Selected Fields" by dragging and dropping.

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Report Fields

Select items to be displayed in report from category fields.
Drag and drop from selection area of left side to the right side of page

Selected Fields	Available
Record Date	Client
Sales Amount	Recruiter
Sales Owner	Job
Sales ID	Person
	Resume
	Sales 17
	Billing Client Name
	Billing Division
	Billing Title
	Billing Name
	Billing Zip Code

Back Next Save Cancel

When finished moving the required items, please click "Next".

The screenshot shows the PORTERS HR-Business Cloud interface. At the top, the logo 'PORTERS HR-Business Cloud' is displayed. The main navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', 'Activity', and 'Report'. The user 'Catherine Porters' is logged in, and the trial expires in 31 days. The 'Add Report' dialog box is open, with the 'Criteria' tab selected. The dialog has tabs for 'Name', 'Data Source', 'Fields', 'Criteria', 'Preview', 'Graph', and 'Axes'. The 'Criteria' tab contains the text 'Entry Criteria' and 'Add settings for field condition. Add field on clicking [Add Search] button and set condition'. Below this is a green '+ Add Criteria' button. A green callout box points to this button with the text: 'The range of data to be displayed in this report can be set. Please click the plus button next to "Add Criteria" in the "Criteria" tab.' At the bottom of the dialog are buttons for 'Back', 'Next', 'Save', and 'Cancel'. The URL 'c-jp.porterscloud.com/report?menu_id=9#' is visible at the bottom left.

The screenshot shows the PORTERS HR-Business Cloud interface. The main window is titled 'Add Report' and has tabs for 'Name', 'Data Source', 'Fields', 'Criteria', 'Preview', 'Graph', and 'Axes'. The 'Criteria' tab is active. A dialog box titled 'Select Extract Criteria' is open, displaying a list of categories and a table of fields. The 'Sales' category is selected, and the 'Record Date' field is highlighted with a blue border. A green callout box with a white border contains the following text:

In the "Select Extract Criteria" window, please click the item you would like to designate a range for. Please click "Record Date" as an example.

The dialog box also contains the following text: フィールドを選択してください。選択後にフィールドにの条件を設定します。

Client		
Recruiter		
Job		
Person		
Resume		
Sales		
Sales ID	Sales Amount	Record Date
Billing Client Name	Billing Division	Billing Title
Billing Name	Billing Zip Code	Billing Country
Billing Prefecture	Billing City	Date Created
Registered by	Date Updated	Updated by
Joining Date	Sales Owner	Sales Phase Memo
Sales Phase Date	Sales Phase Recent Flag	Sales Phase

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields **Criteria** Preview Graph Axes

Entry Criteria

Add settings for field condition. Add field on clicking [Add Search] button and set condition

+ Add Criteria

Record Date

Current Month & Next Month & Month after

Back **Next** Save Cancel

Please designate a criteria range,
and click "Next".

✂ More conditions can be added by clicking the
plus button next to "Add Criteria".

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Client Recruiter

Add Report

Name Data Source Fields Criteria **Preview** Graph Axes

Report Preview

Confirm sample to be created. If it is ok, click [Save] and select [Next] if you want to create more graphs.

Sales Amount	Record Date	Sales Owner	Sales ID
1200000	2014/5/16	Catherine Porters	10001
1500000	2014/6/16	Catherine Porters	10002
1300000	2014/5/16	Nozomi Ishii	10005
2000000	2014/6/16	Nozomi Ishii	10006
1200000	2014/6/16	Stacie	10007

Folder
Add Folder
Prog
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Back **Next** Save Cancel

In the "Preview" tab, please check the sample contents and if you are satisfied, click "Next".

The screenshot shows the 'Add Report' dialog box in the PORTERS HR-Business Cloud application. The dialog has a title bar with a close button (X) and a tabbed interface with the following tabs: Name, Data Source, Fields, Criteria, Preview, Graph (selected), and Axes. Below the tabs, there is a 'Graph Type' section with a search bar and the text 'Select Graph Type'. Two graph type options are displayed in separate boxes, both highlighted with blue borders: 'Line Graph' (showing a line chart) and 'Bar Graph' (showing a bar chart). A green callout bubble points to the 'Bar Graph' option with the text: 'In the "Graph" tab, please select the graph type and click "Next".' At the bottom of the dialog, there are four buttons: 'Back', 'Next' (highlighted with a blue border), 'Save', and 'Cancel'. The background of the application shows a navigation menu with options like Client, Recruiter, Job, Person, Resume, Sales, Process, Activity, and Report. The top right corner of the application shows the user name 'Catherine Porters' and a settings icon.

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph **Axes**

Graph Axis

Select Vertical and Horizontal Axis from Selection.

Horizontal Axis Available

Sales

Vertical Axis

Grouping Unit

Back Next Save Cancel

In the "Axes" tab, please click "Sales" to display the items under "Available".

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Graph Axis

Select Vertical and Horizontal Axis from Selection.

Horizontal Axis	Available
	Sales
	Record Date
	Sales Amount
	Sales Owner
	Sales ID

Vertical Axis

Grouping Unit

Back Next Save Cancel

Please select the items to be displayed on the graph, and drag & drop them to "Horizontal Axis", "Vertical Axis" or "Grouping Unit".

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Graph Axis

Select Vertical and Horizontal Axis from Selection.

Horizontal Axis

Record Date Per Day
Every Year
Per Month
Per Day

Vertical Axis

Sales Amount Total

Grouping Unit

Sales Owner

Available

Sales

Record Date
Sales Amount
Sales Owner
Sales ID

When all settings are completed, please click "Save".

Back Next **Save** Cancel

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Client Recruiter Job Person Resume Sales Process Activity Report

Add Report

Name Data Source Fields Criteria Preview Graph Axes

Graph Axis

Select Vertical and Horizontal Axis from Selection.

Horizontal Axis

Record Date Per Month

Vertical Axis

Sales Amount Total

Grouping Unit

Sales Owner

Available

- Sales
 - Record Date
 - Sales Amount
 - Sales Owner
 - Sales ID

When all settings are completed , please click "Save".

Back Next **Save** Cancel

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Client Recruiter Job Person Resume Sales Process Activity Report

Back to Folders **Sales Report** Edit

Data Source Sales

Criteria to Extract Record Date Current Month, Next Month & Month after

Report Graph

Download CSV Show 25 records

Sales Amount	Record Date	Sales Owner	Sales ID
1200000	2014/5/16	Catherine Porters	10001
1500000	2014/5/16	Catherine Porters	10002
2000000	2014/5/16	Catherine Porters	10003
1200000	2014/5/16	Nozomi Ishii	10004
1300000	2014/5/16	Nozomi Ishii	10005
2000000			
1200000			
1200000			
1700000			

In the "Report" tab , you can check the contents of the report.

To check the graph, please click the "Graph" tab.

- ❌ Data can be downloaded by clicking "Download CSV".
- ❌ To re-edit the settings, please got to "Edit" on the upper right.

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Client Recruiter Job Person Resume Sales Process Activity Report

Back to Folders Sales Report Edit

Data Source Sales
Criteria to Extract Record Date Current Month, Next Month & Month after

Report Graph

Sales Report

Sales Amount (Total)

Record Date

Legend: Nozomi Ishii (Red), Stacie (Orange)

Sales Amount (Total)

Sales Owner	2014/5	2014/6	2014/7
Catherine Porters	1200000	1500000	2000000
Nozomi Ishii	1300000	2000000	1200000
Stacie	1200000	1700000	1200000

✂ To view all created reports, please click "Back to Folders" in the upper left.

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Client Recruiter Job Person Resume Sales Process Activity Report

Folder Monthly report(For General User)

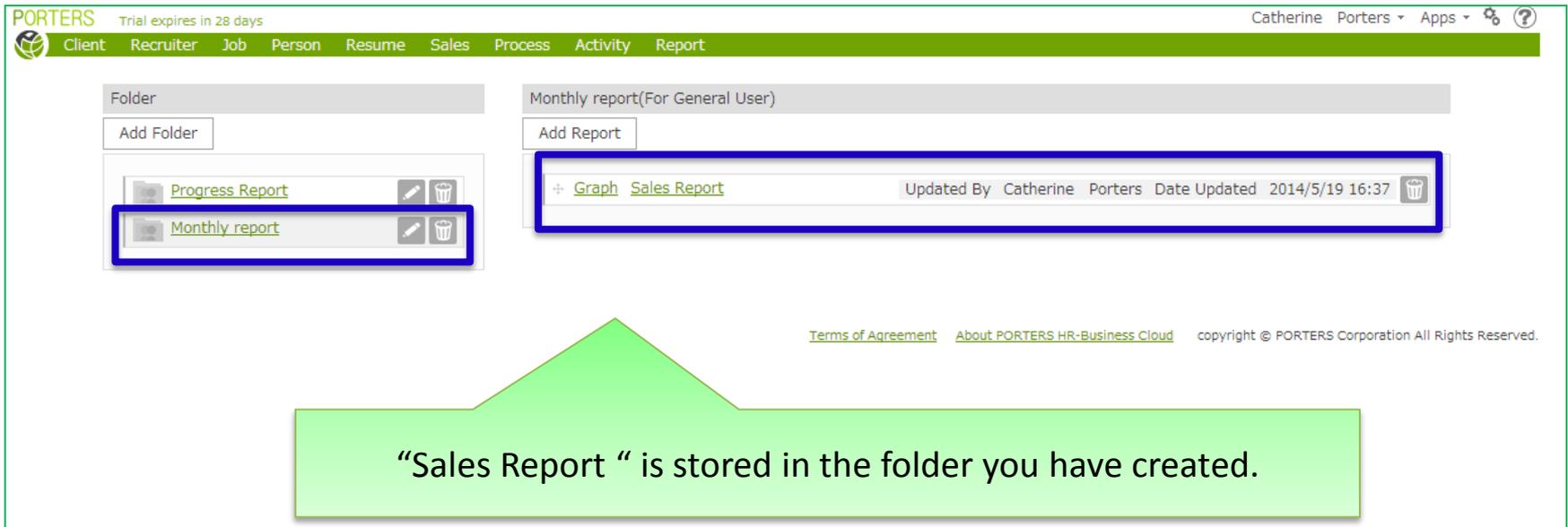
Add Folder Add Report

Progress Report Monthly report

Graph Sales Report Updated By Catherine Porters Date Updated 2014/5/19 16:37

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“Sales Report “ is stored in the folder you have created.

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, there is a navigation bar with the PORTERS logo, a trial expiration notice, the user name 'Catherine Porters', and an 'Apps' menu. Below this is a secondary navigation bar with menu items: Client, Recruiter, Job, Person, Resume, Sales, Process, Activity, and Report. The main content area is divided into two panels. The left panel, titled 'Folder', contains an 'Add Folder' button and a list of folders: 'Progress Report' and 'Monthly report'. The 'Monthly report' folder is highlighted with a blue border. The right panel, titled 'Monthly report(For General User)', contains an 'Add Report' button and a list of reports: 'Graph Sales Report'. This report is also highlighted with a blue border and includes metadata: 'Updated By Catherine Porters' and 'Date Updated 2014/5/19 16:37'. At the bottom right, there are links for 'Terms of Agreement' and 'About PORTERS HR-Business Cloud', along with a copyright notice. A large green callout box at the bottom center contains the text: "Sales Report " is stored in the folder you have created.

Regarding Data Acquisition Timing in the Report

- If you create new Report and run it
 - ➔ **Real-time (up to date) aggregate results are displayed**
- If you run an existing Report in the past 29 minutes
 - ➔ **Last executed aggregate results are displayed**
- If you run an existing Report beyond 30 minutes ago
 - ➔ **Real-time (up to date) aggregate results are displayed**
- If you edit first and then run the existing Report
 - ➔ **Real-time (up to date) aggregate results are displayed**

For examples : At 10:00 a new Report is created

If you run it at 10:00, you will get real-time (up to date) aggregate results

If you run it in between 10:00 – 10:29, you will get the previous 10:00 aggregate results

If you run it at 10:30, you will get real-time (up to date) aggregate results

If you edit the report at 10:15 and then run it, you will get a real-time (up to date) aggregate results