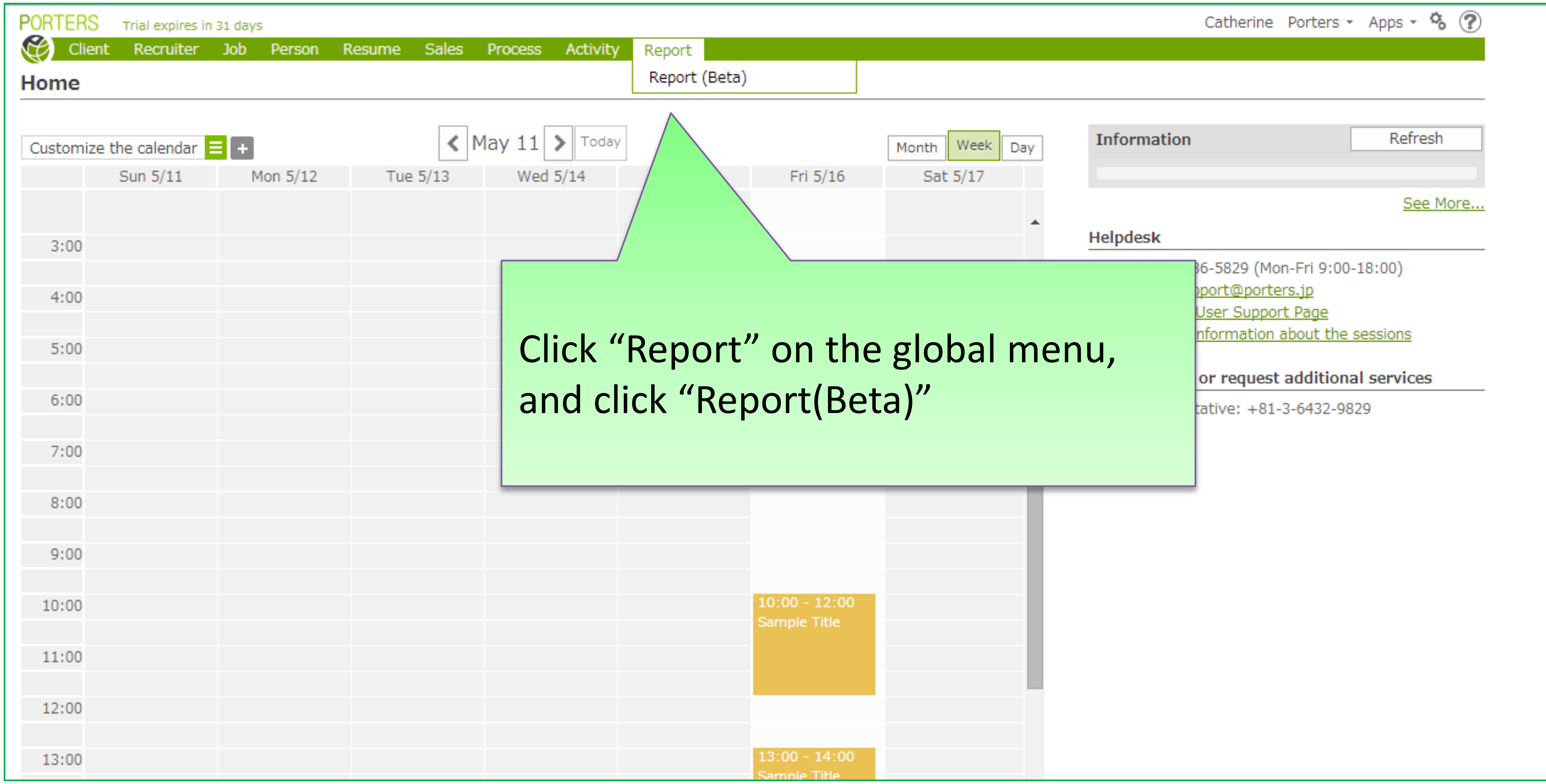
# How to Create a Report (Graph)

PORTERS HR-Business Cloud

This guide will demonstrate how to create a Sales Report




Click “Report” on the global menu, and click “Report(Beta)”

※ 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”.

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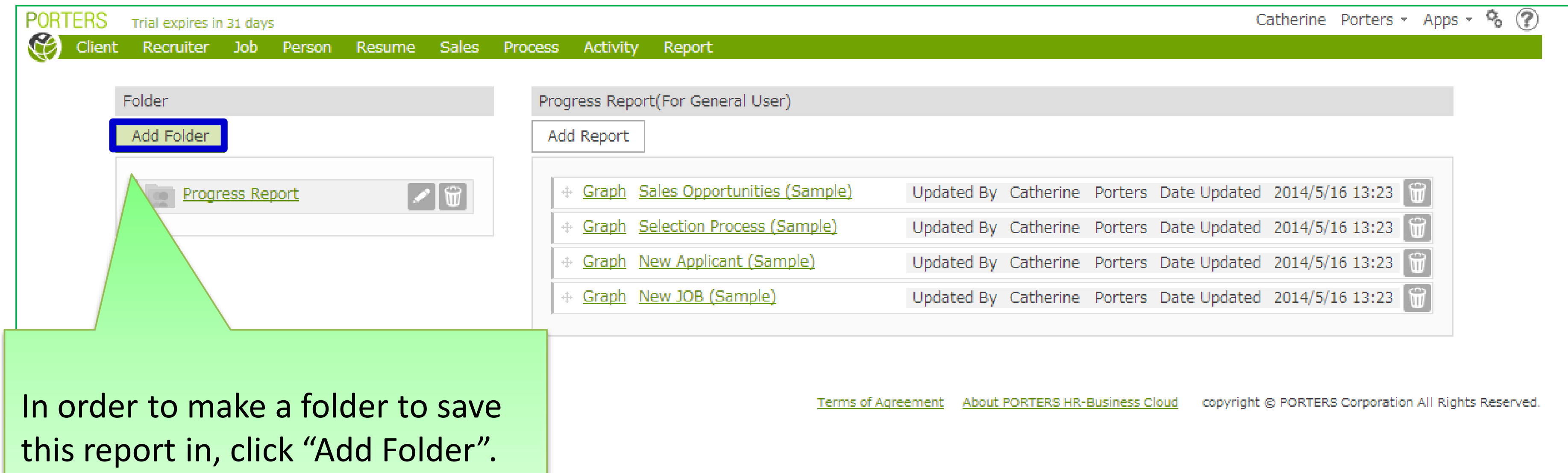


In order to make a folder to save this report in, click “Add Folder”.

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

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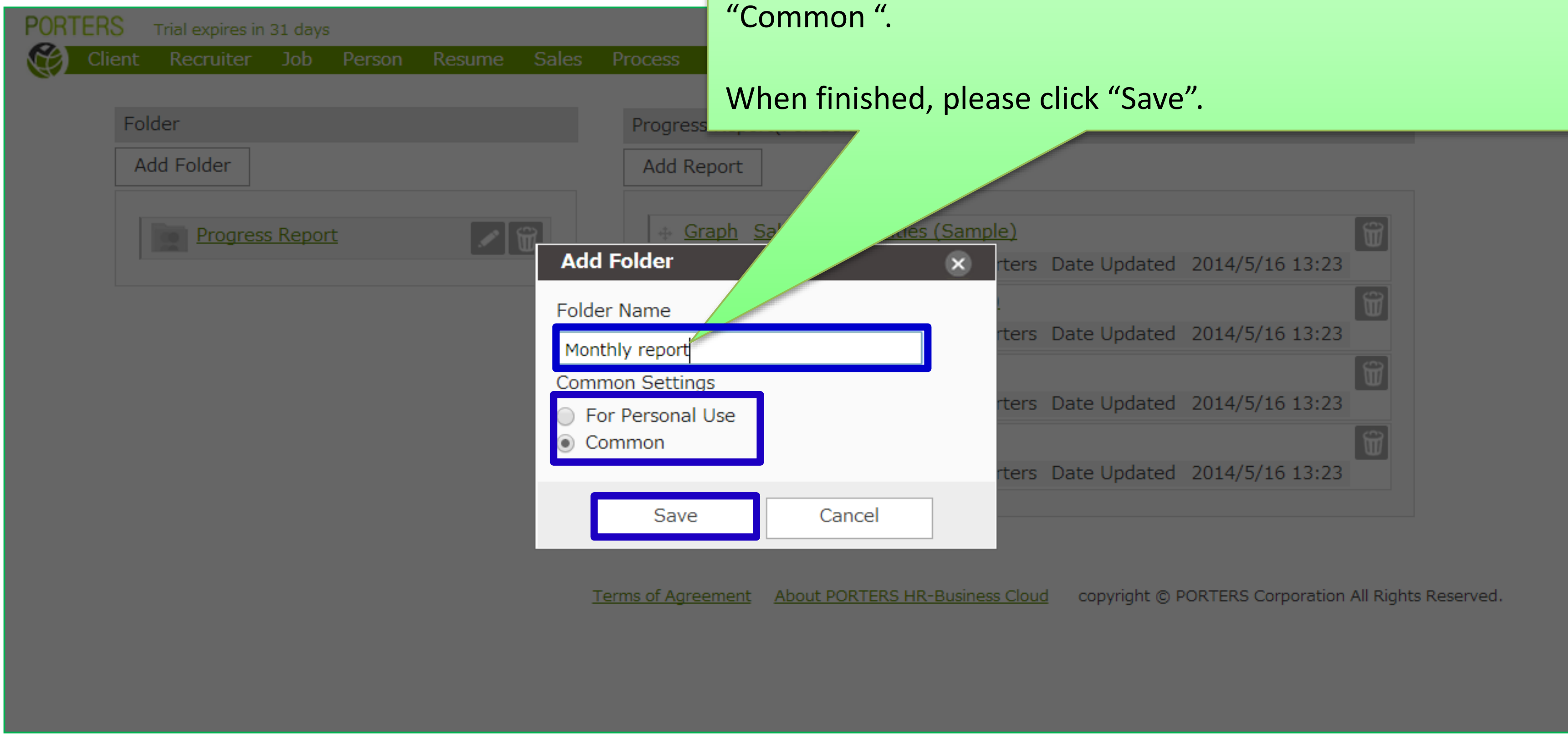
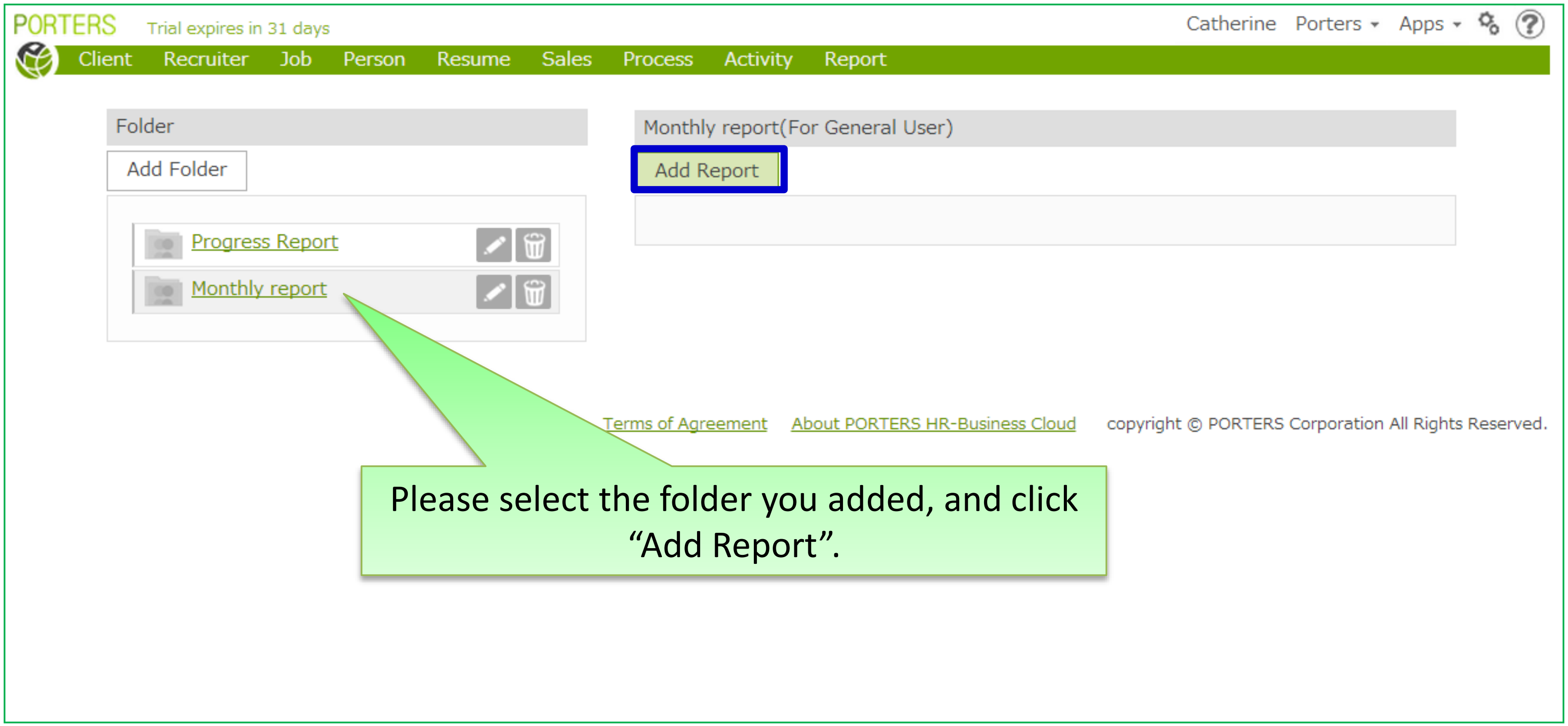
In the “Add Folder” dialog box, please enter the “Folder Name”.

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”.






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

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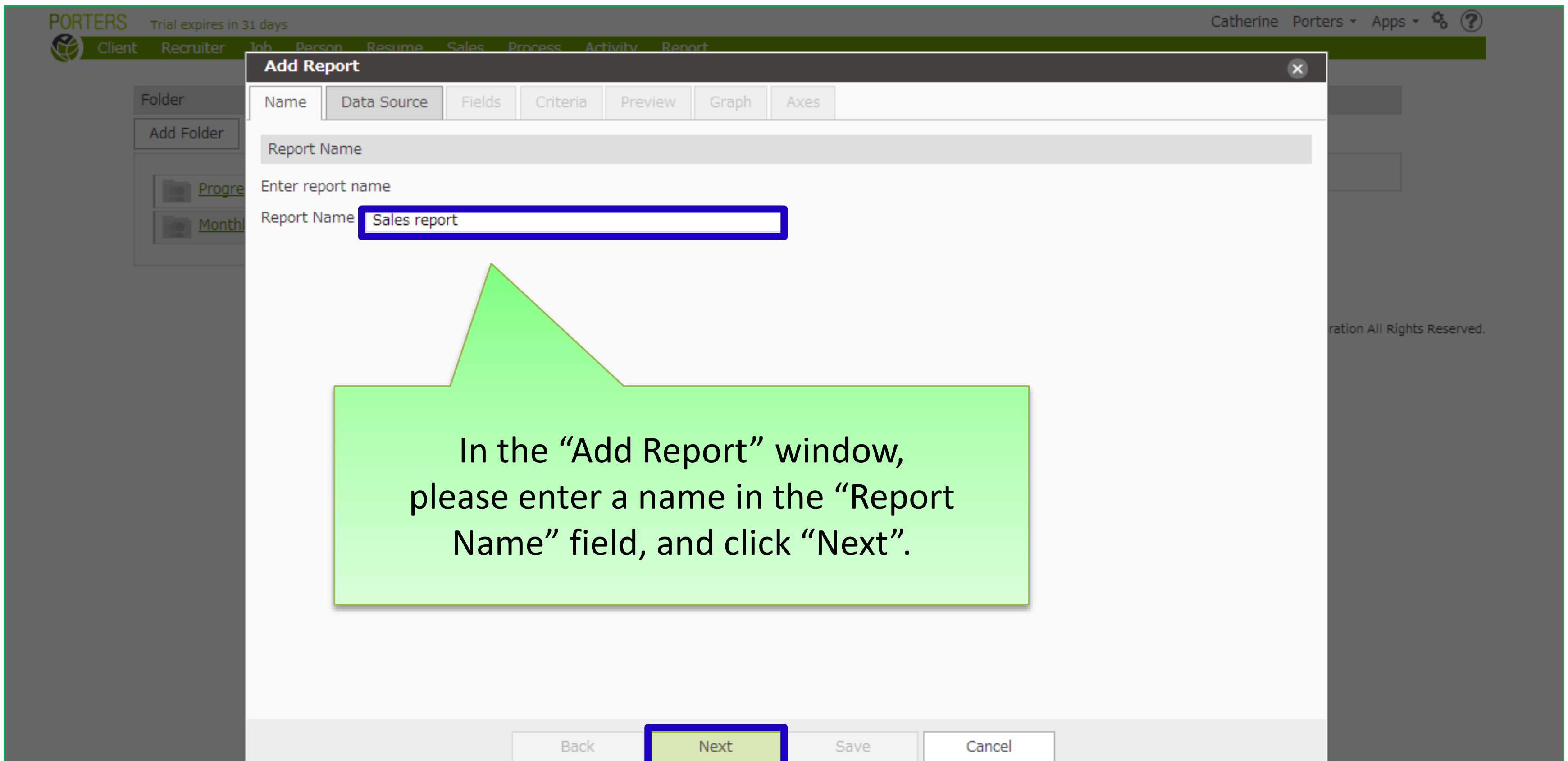

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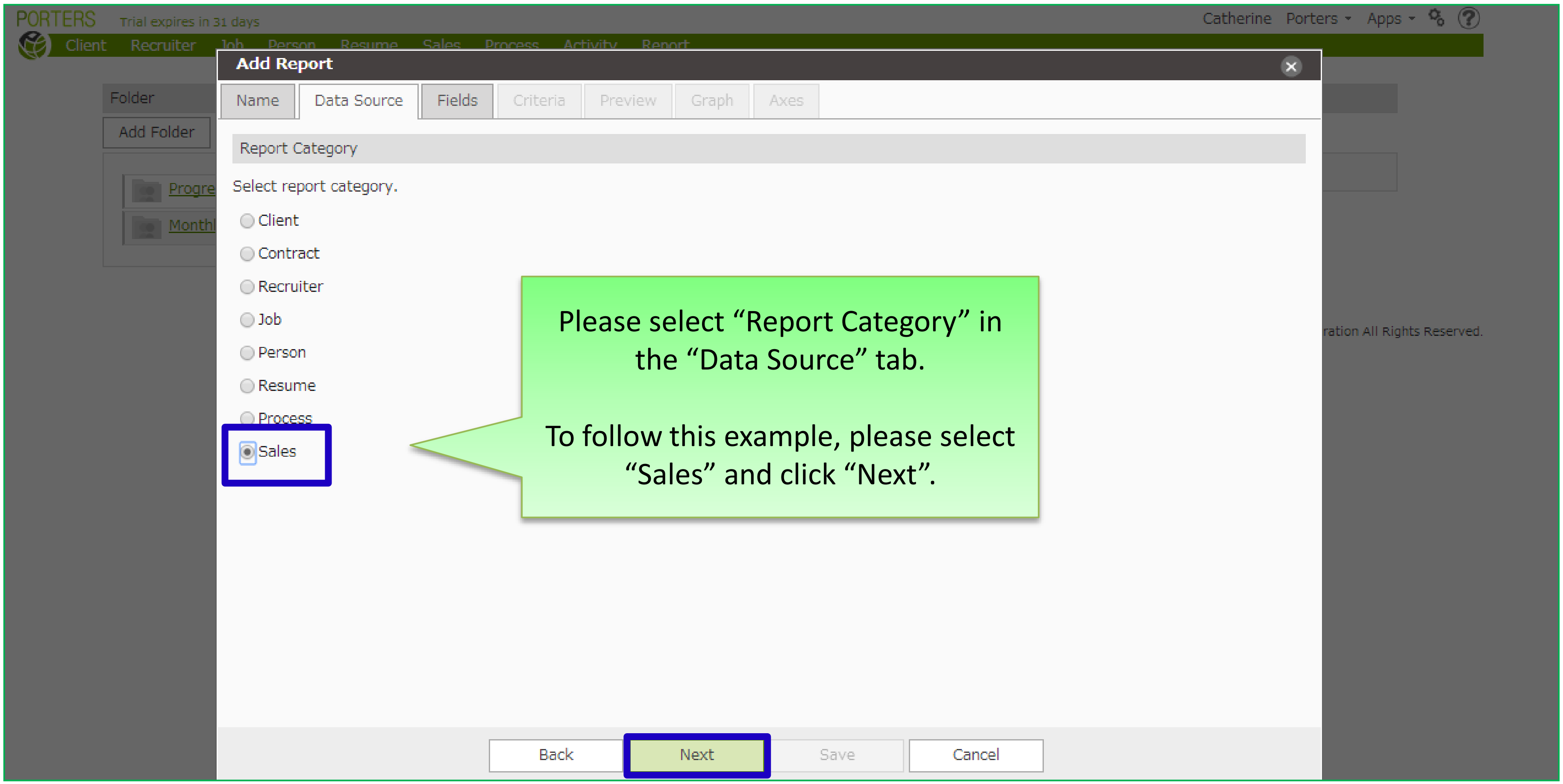

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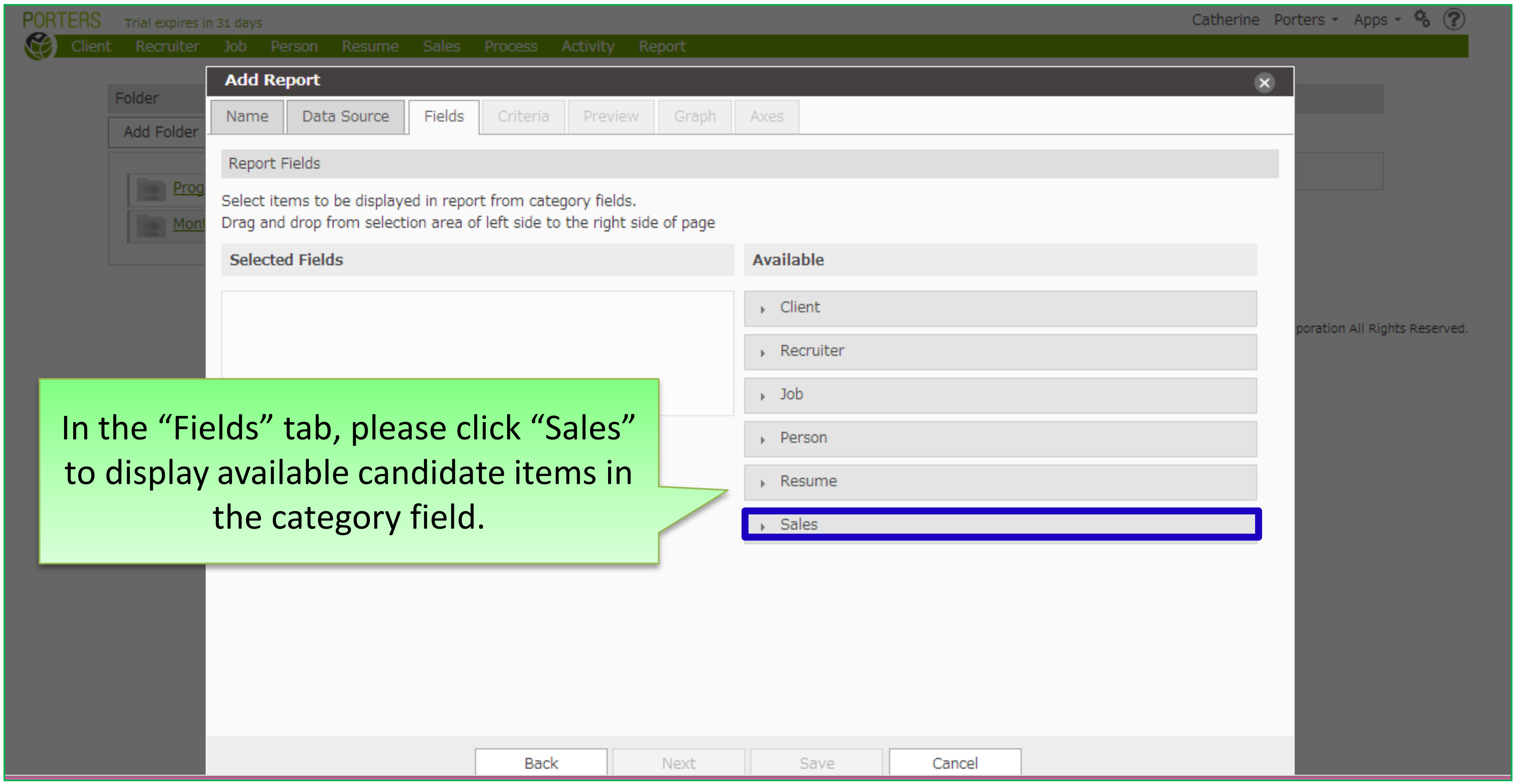


In the "Fields" tab, please click "Sales" to display available candidate items in the category field.

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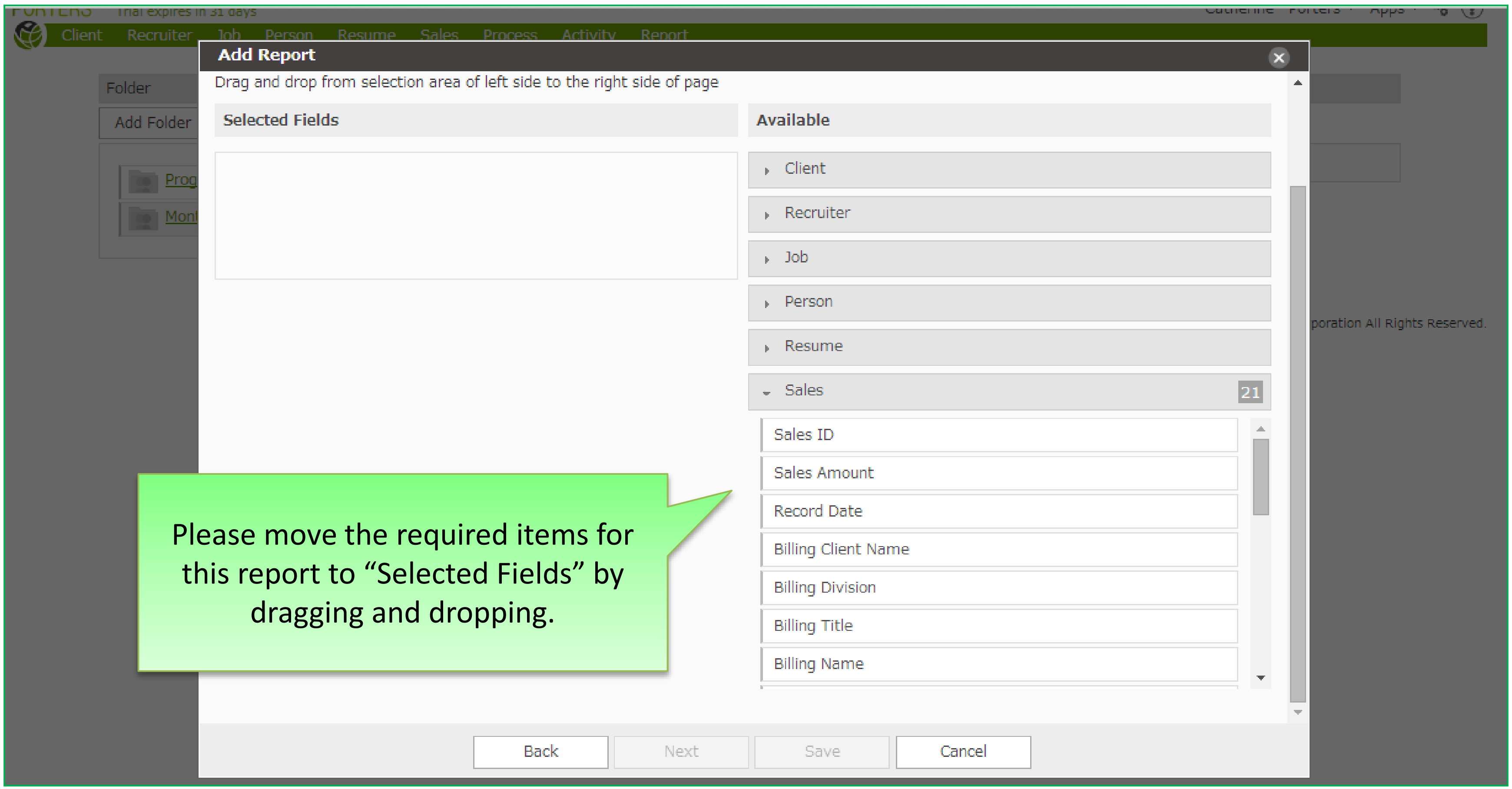

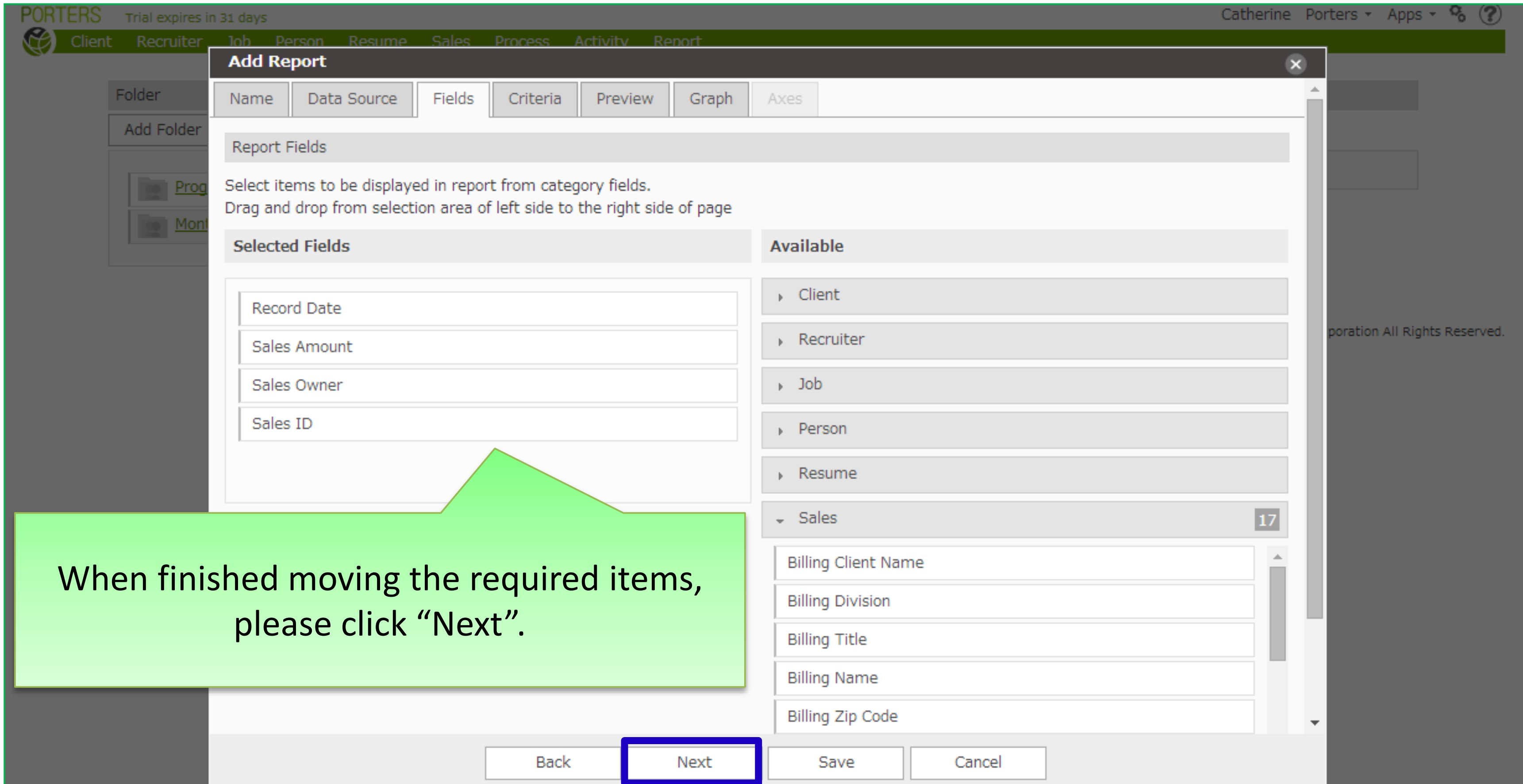


When finished moving the required items, please click “Next”.

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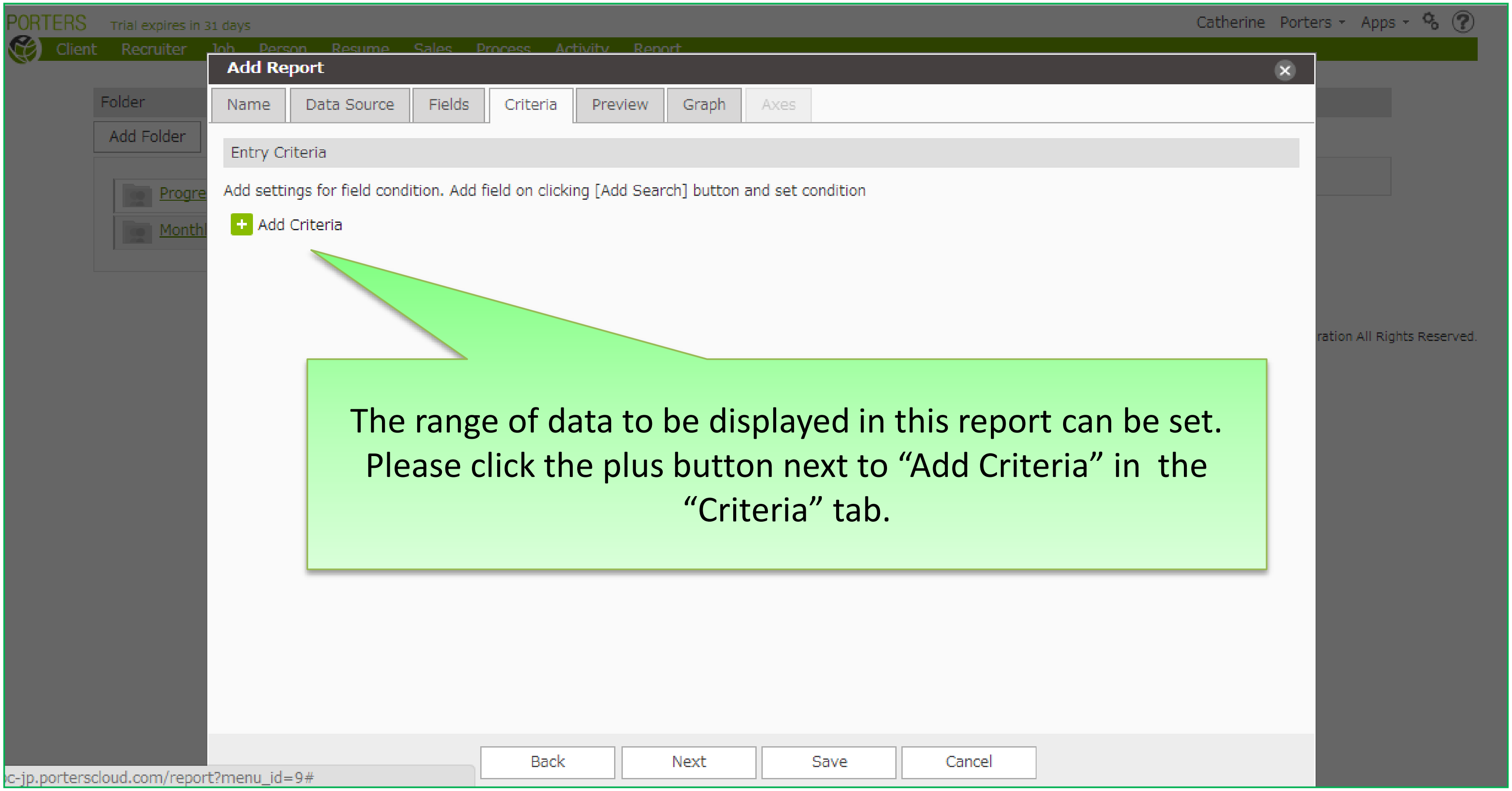


The range of data to be displayed in this report can be set. Please click the plus button next to “Add Criteria” in the “Criteria” tab.

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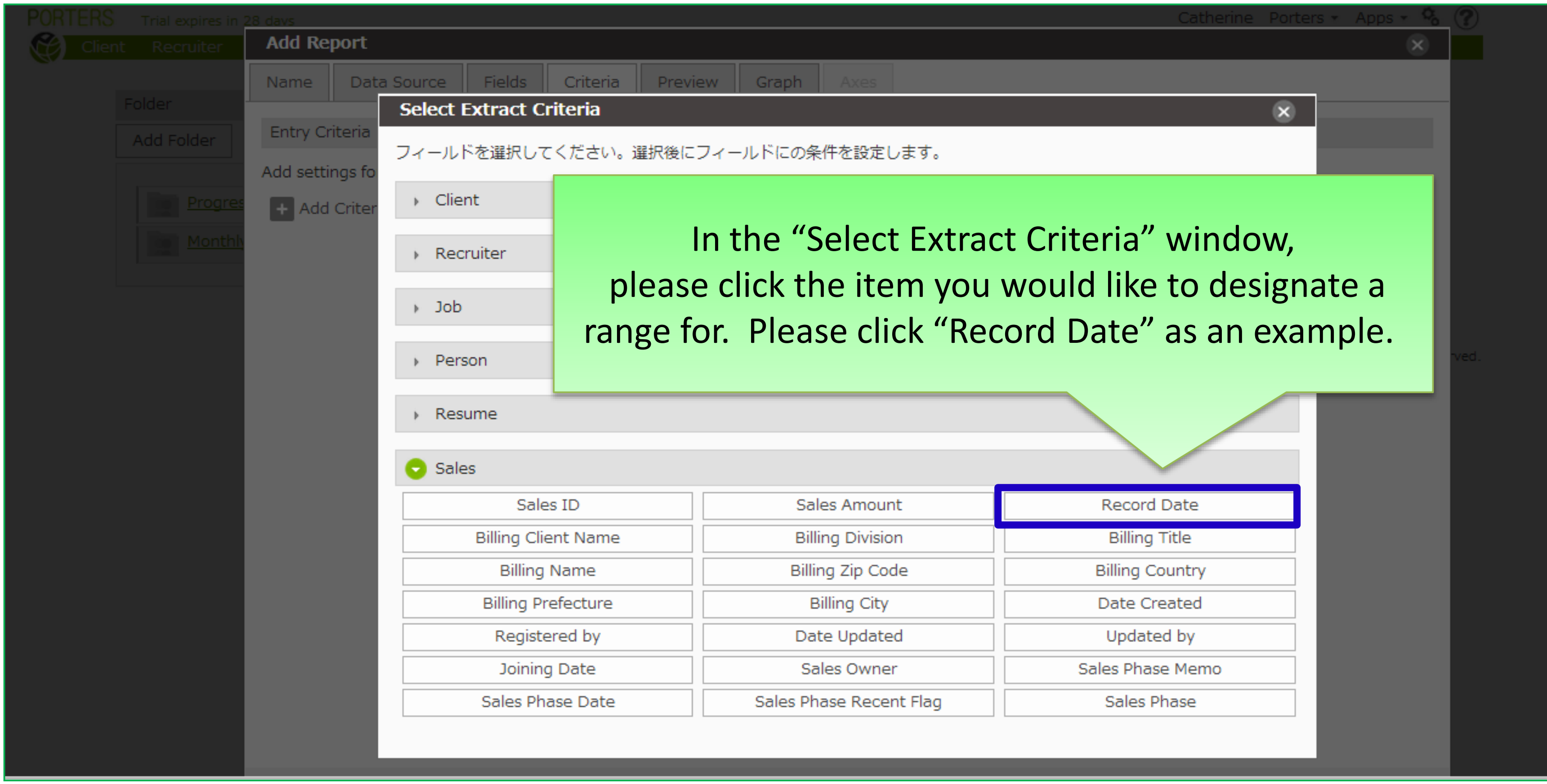

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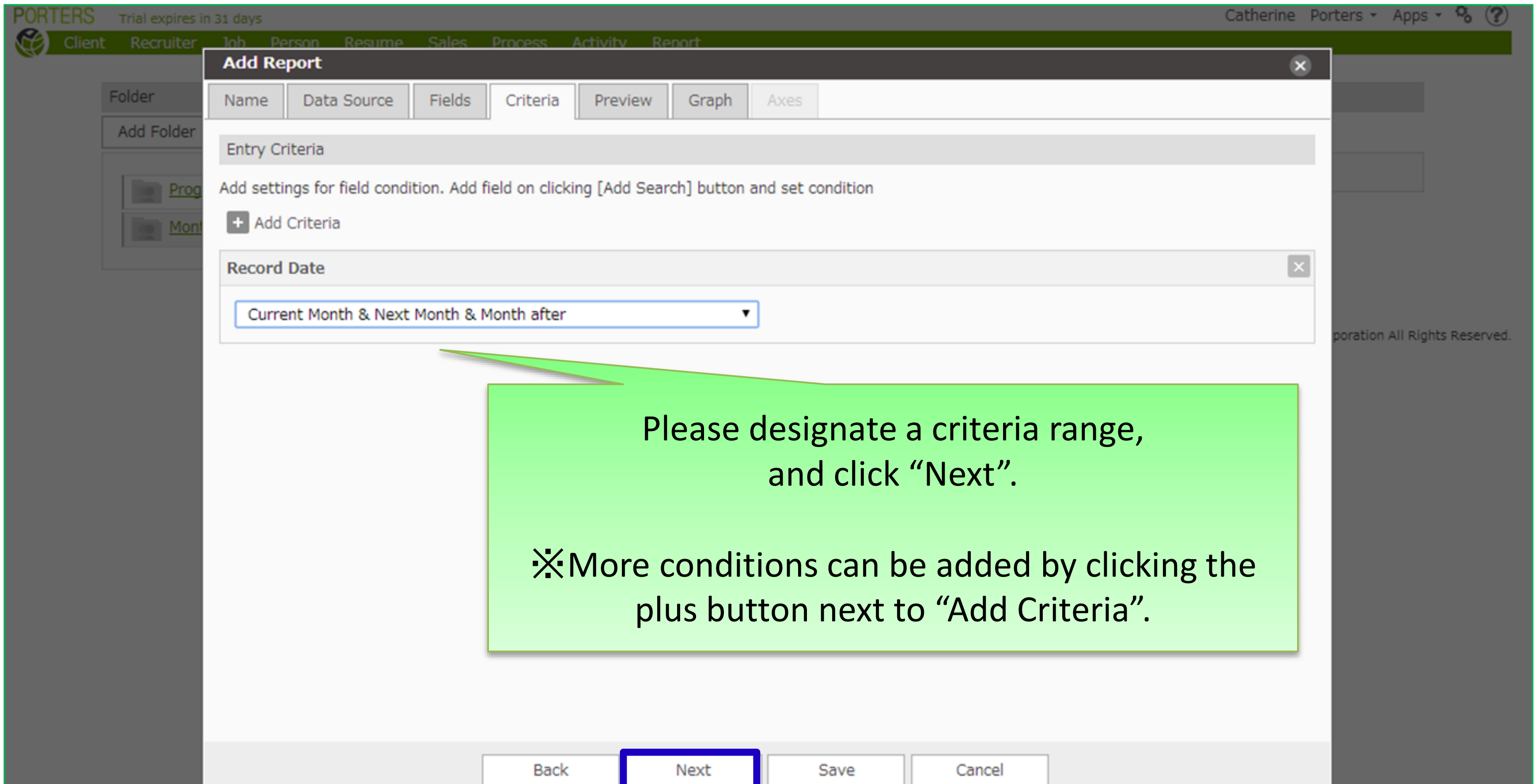

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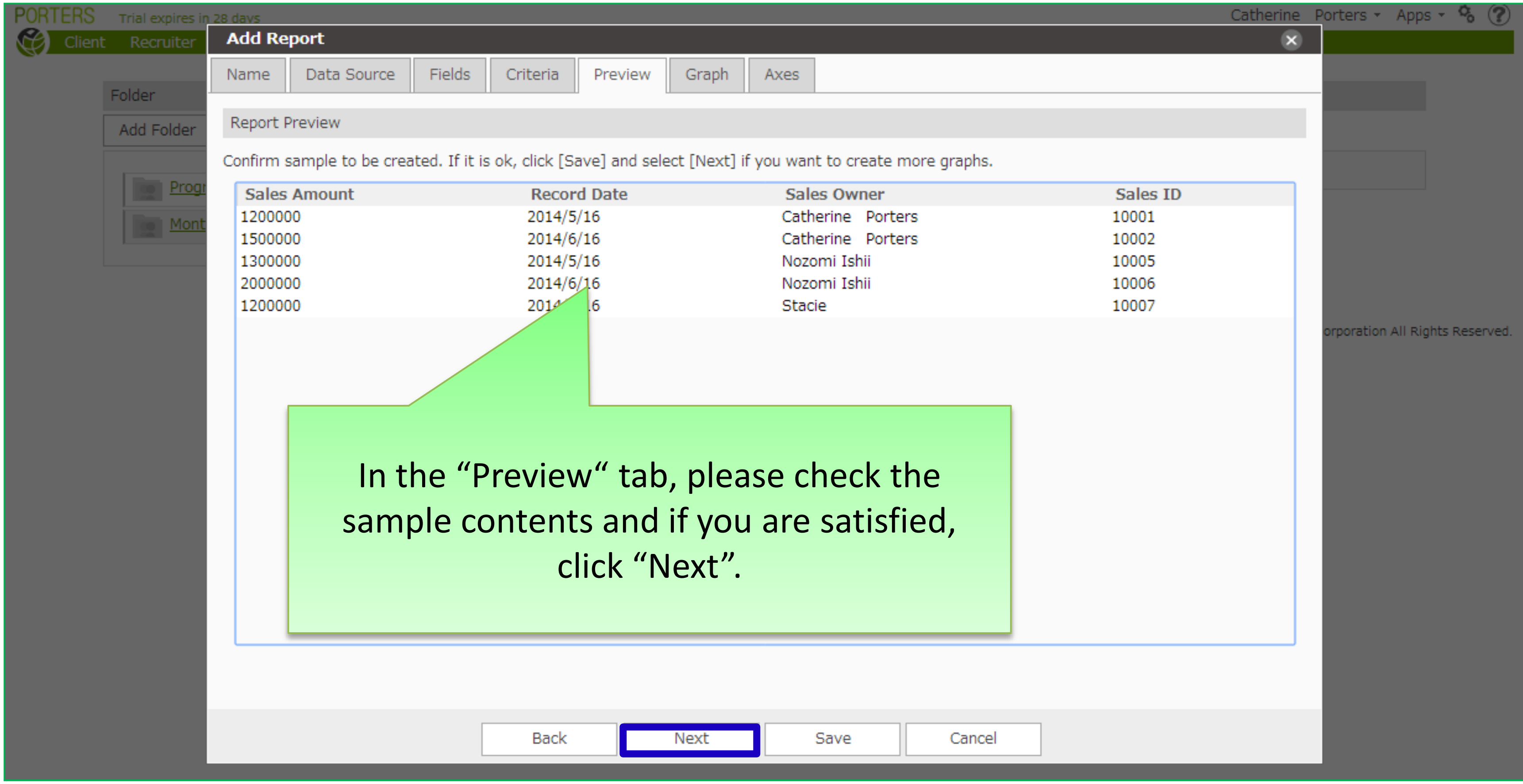

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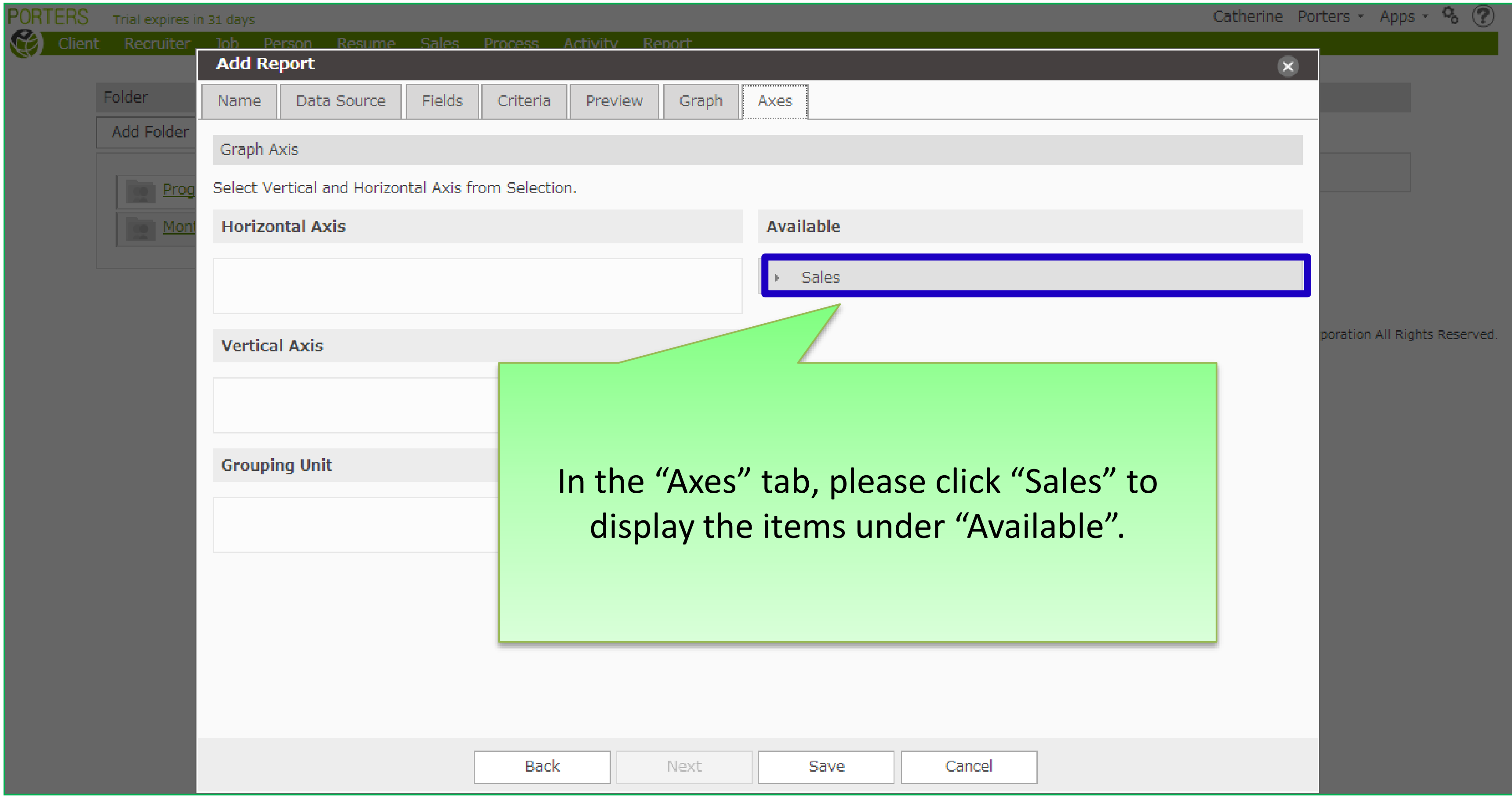
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Trial expires in 31 days
Catherine
Porters
Apps
Client
Recruiter
Job
Person
Resume
Sales
Process
Activity
Report
Add Report
Name
Data Source
Fields
Criteria
Preview
Graph
Axes
Graph Axis
Select Vertical and Horizontal Axis from Selection.
Horizontal Axis
Available
Sales
Vertical Axis
Grouping Unit
Folder
Add Folder
Back
Next
Save
Cancel
In the "Axes" tab, please click "Sales" to display the items under "Available".

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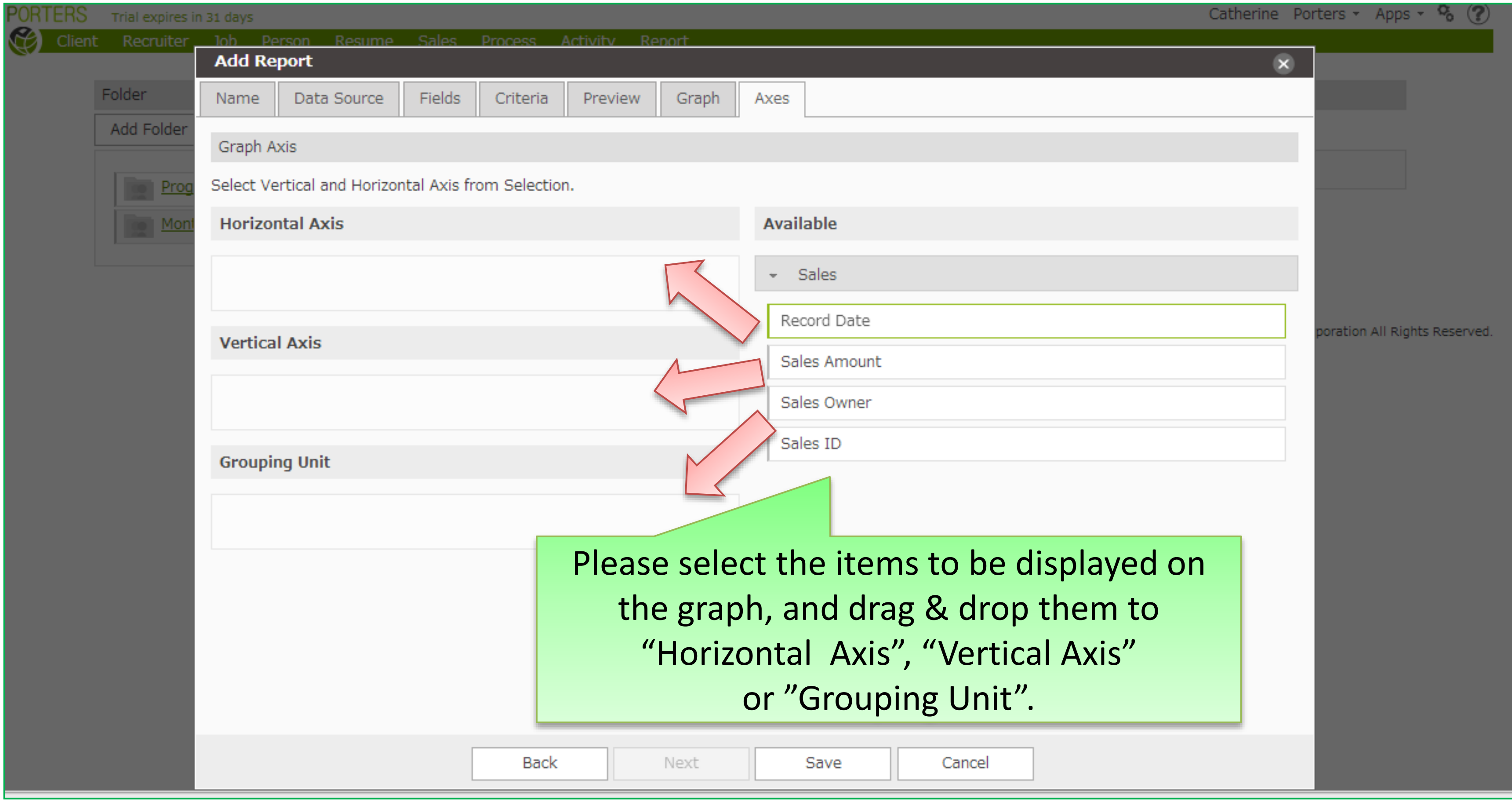

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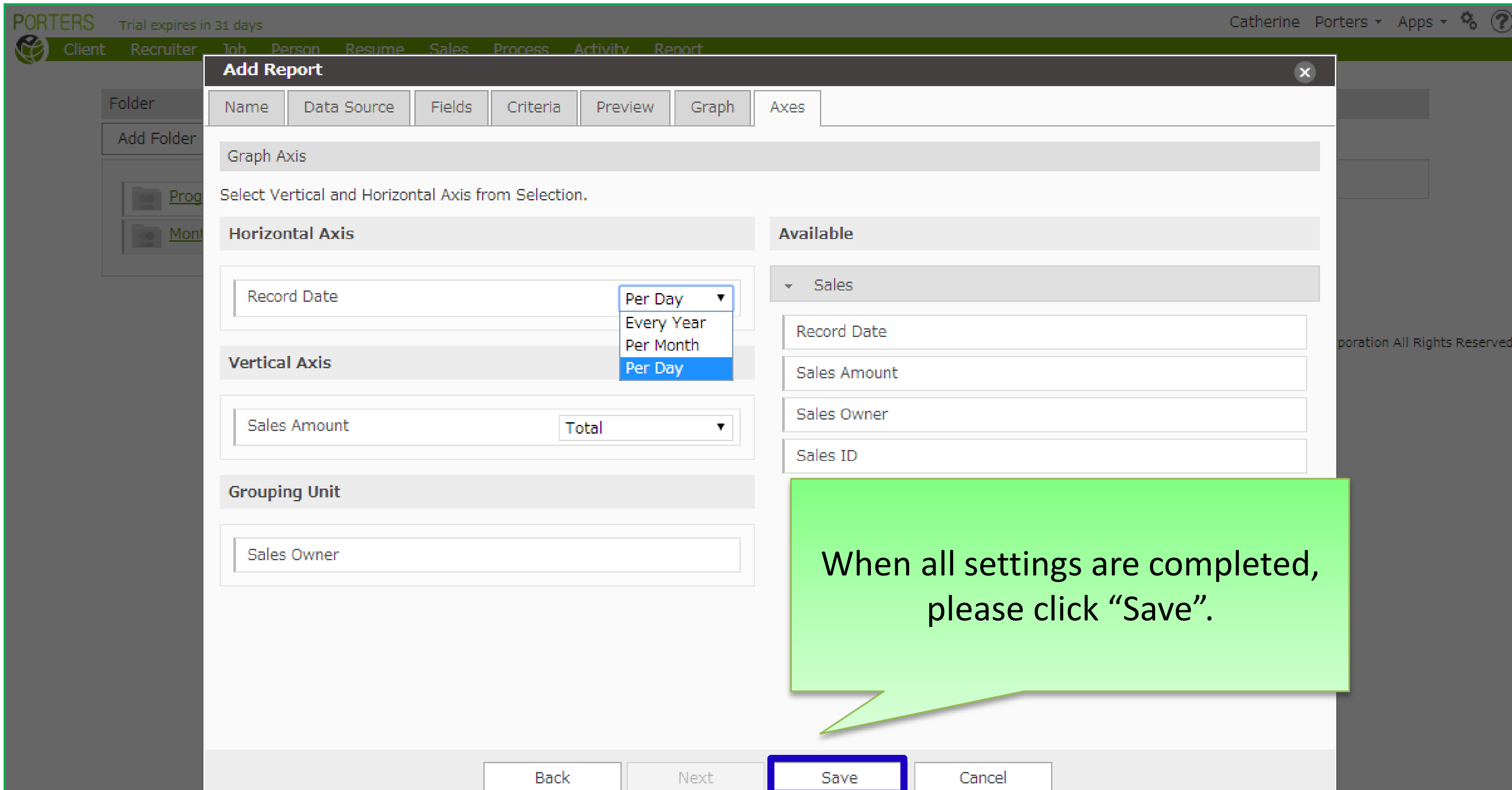

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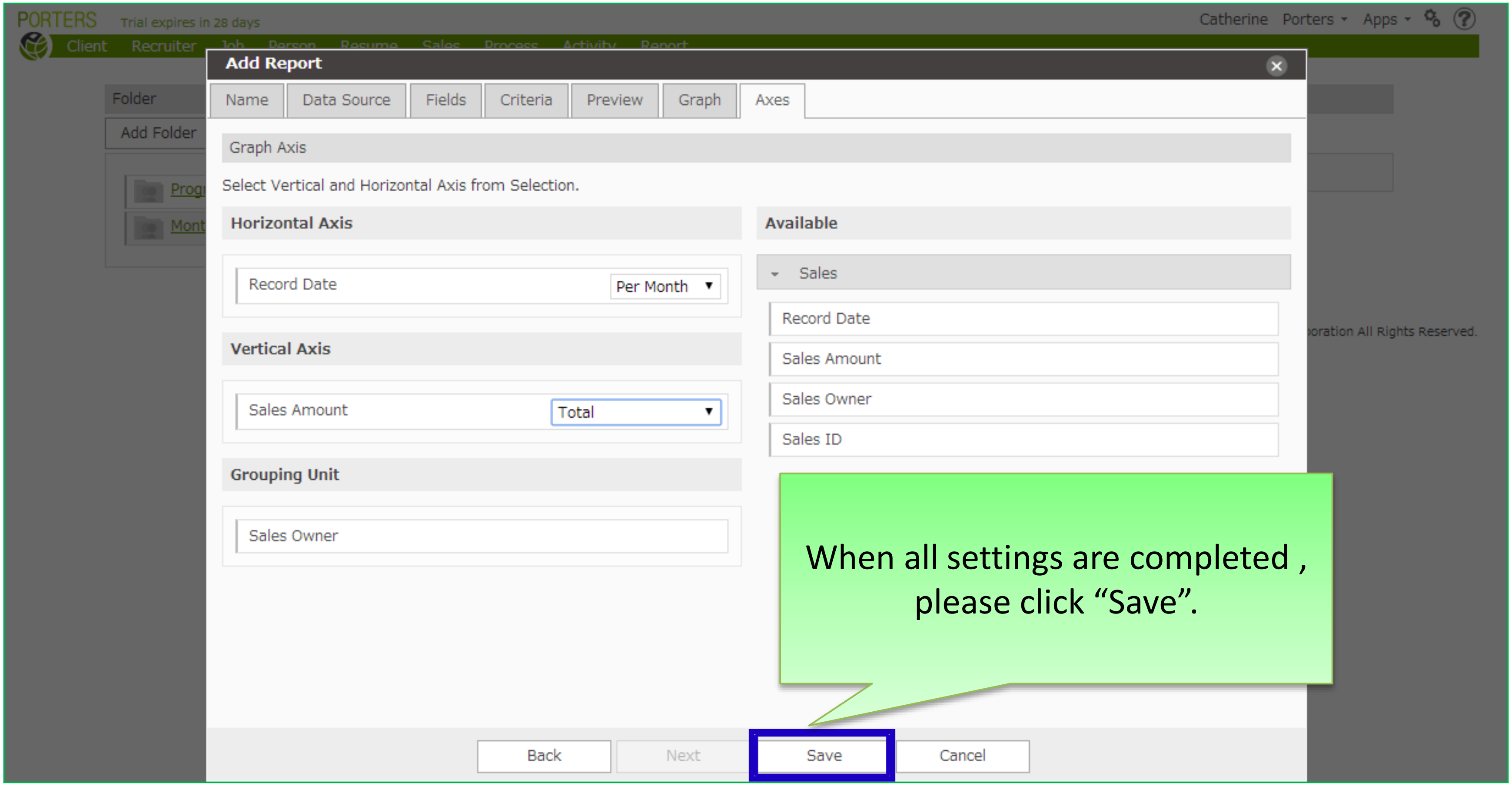

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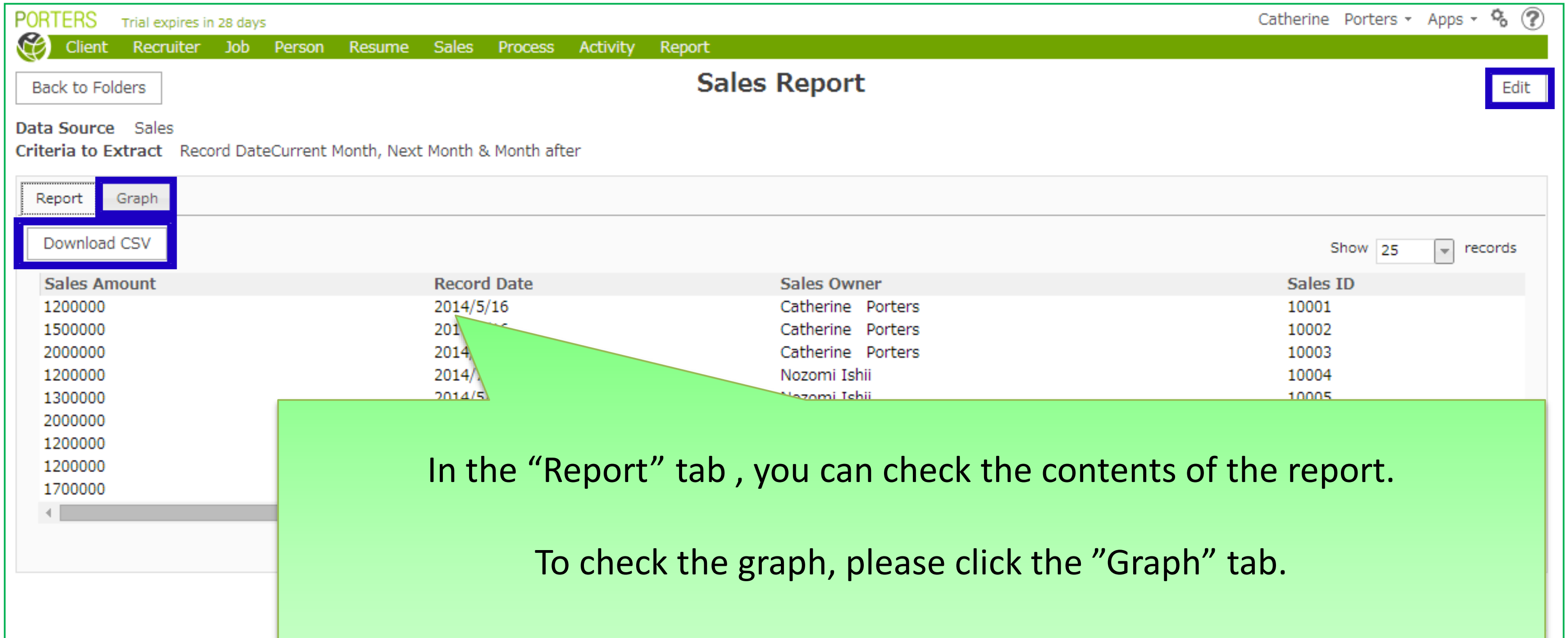


In the "Report" tab , you can check the contents of the report.

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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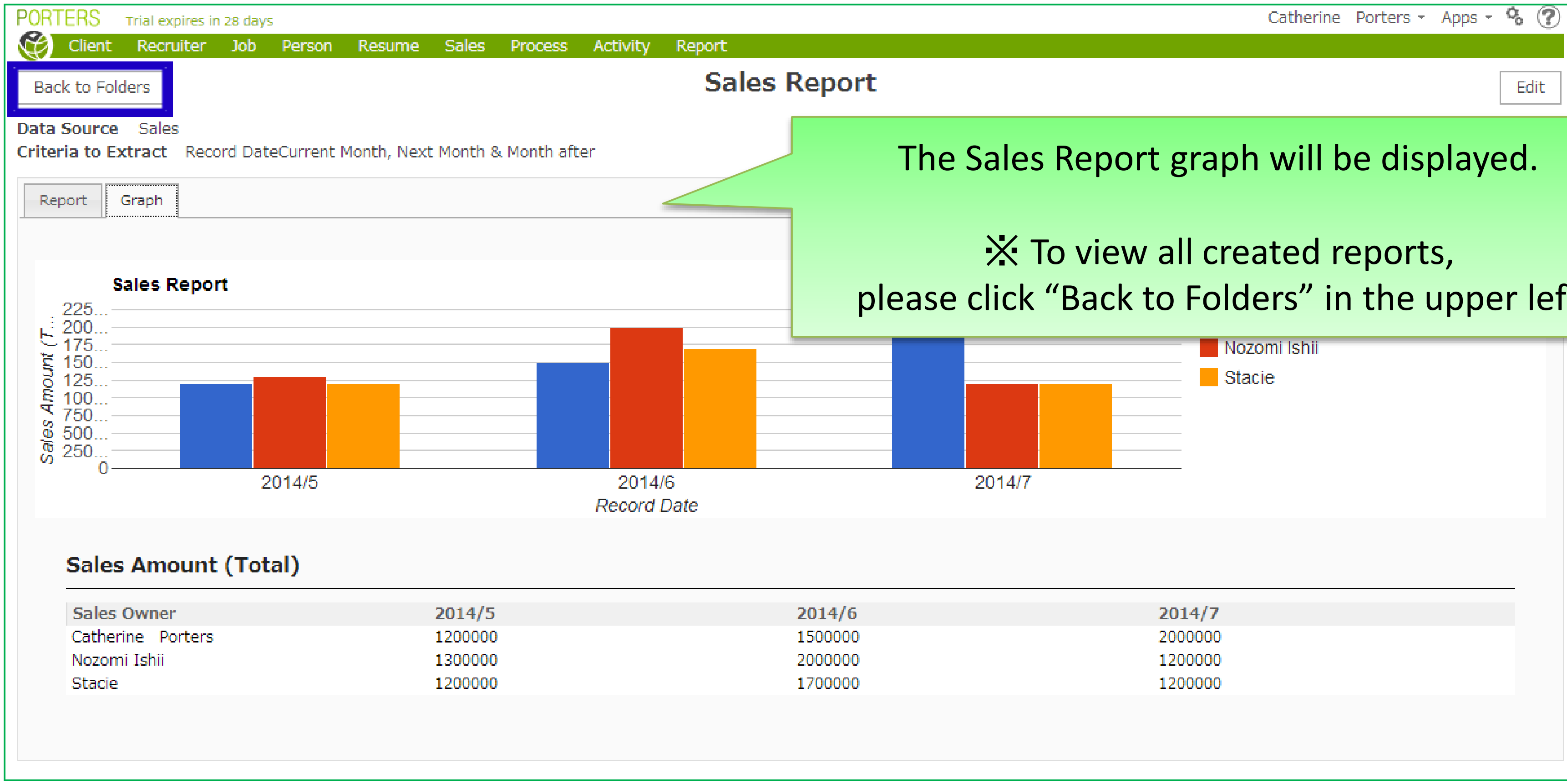


| Sales Owner | 2014/5 | 2014/6 | 2014/7 |
|---|---|---|---|
| Catherine Porters | 1200000 | 1500000 | 2000000 |
| Nozomi Ishii | 1300000 | 2000000 | 1200000 |
| Stacie | 1200000 | 1700000 | 1200000 |

The Sales Report graph will be displayed.

※ To view all created reports,
please click “Back to Folders” in the upper left.

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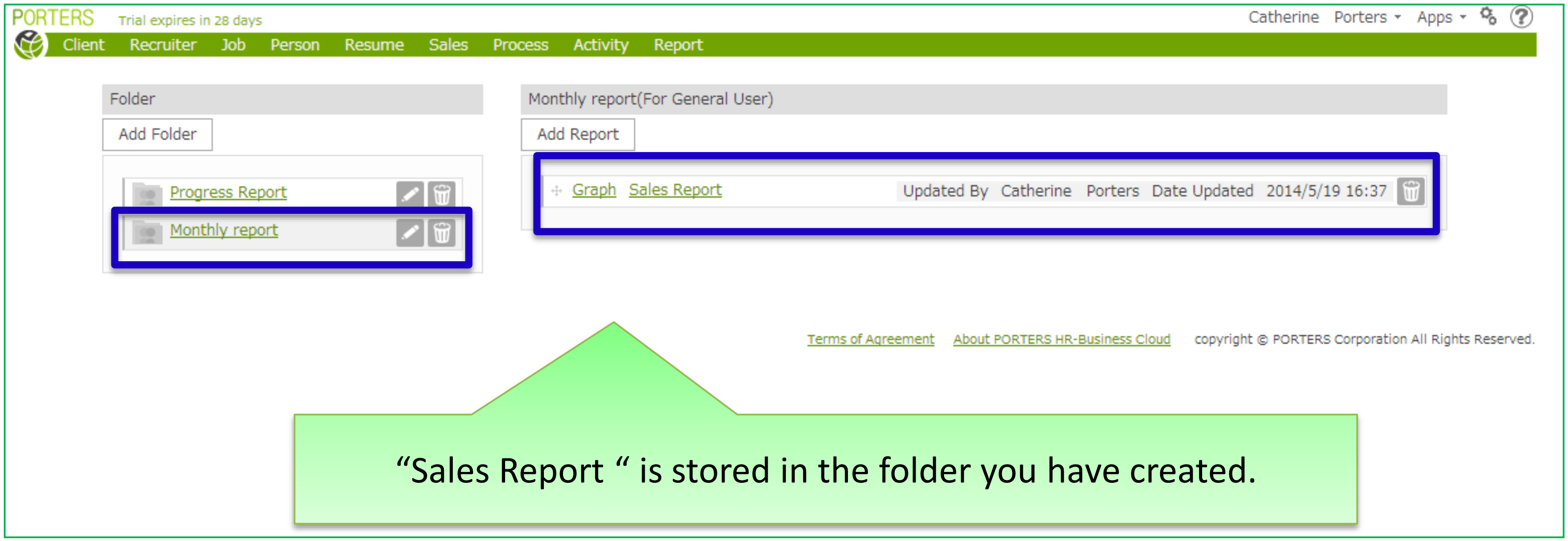


"Sales Report " is stored in the folder you have created.

# 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