

December 21, 2015

# PORTERS HR-Business Cloud

Version3.12 Release Note

## Functionality Summary and Impact Scope

**Summary :** The following changes are included in HR-Business Cloud(HRBC) Version3.12

Improvements		
1-A	Search performance	Search logic is changed to improve the search performance.
1-B	Screen display performance	The master information is cached to improve screen display performance.
1-C	Report functionality	To make report easy to use, new conditions are added in the criteria, report and graph display is changed, and the csv download limit is raised.
1-D	Calendar	When displaying Phases/Process, showing only the latest phase is now possible.
1-E	Global menu color change	The global menu color is changed to easily distinguish which menu is currently displayed.
1-F	Overwrite check when updating a resource	Overwrite check is done when multiple users tries to save a record at the same time.
1-G	Process Additional Search Criteria	From the Process search, the record owner of Client, Job, Resume and Process can now be searched by OR condition.
1-H	Sales Document Template	In the Sales document template, contract customized fields can now be set.

\*Resource refers to each menu in the global menu (e.g. Recruiter, Resume). We will use "Resource" from here on in this document.

## New Functionality

2-A

Dashboard

The phase count of Job, Resume and Process can now be viewed in 1 screen. In addition, the results can also be displayed in graph.

### Impact Scope :

Functionality	Admin setting required	User setting required
1-A Search Performance		
1-B Display performance		
1-C Report		<input type="radio"/>
1-D Calendar		<input type="radio"/>
1-E Global Menu		
1-F Resource Overwrite Check		
2-A Dashboard		<input type="radio"/>

### 1-A) Search Performance Improvement

#### ➤ Resource Add, Update, Delete, Search mechanism is changed

The internal mechanism of the search functionality is changed and it significantly improved the performance of search. In addition, the resource data save mechanism is also changed to improve the performance when retrieving resource data.

### 1-B) Screen Display Performance Improvement

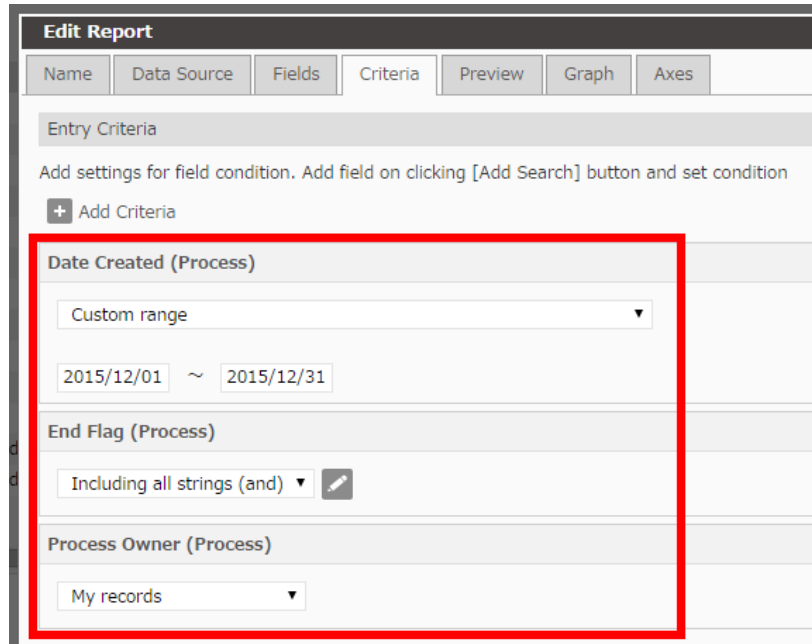
#### ➤ Master data is cached

The Menu, Action Menu, and Sub-list information are now cached. This improvement reduced the server load and also shortened the waiting time when retrieving data.

## 1-C) Report Functionality Improvements

### ➤ Output condition additional setting

In the report criteria, adding criteria such as User Specifics (owner, updated by, created by), Fixed Date, Close Flag Is Not Selected (In case the data source is a Process) is now possible.



The screenshot shows the 'Edit Report' interface with the 'Criteria' tab selected. The 'Entry Criteria' section contains a '+ Add Criteria' button. Below this, three criteria are listed: 'Date Created (Process)', 'End Flag (Process)', and 'Process Owner (Process)'. The 'Date Created (Process)' section is highlighted with a red box and includes a 'Custom range' dropdown, date input fields for '2015/12/01' and '2015/12/31', and an 'End Flag (Process)' section with a dropdown set to 'Including all strings (and)'. The 'Process Owner (Process)' section has a dropdown set to 'My records'.

### ➤ Report and Graph Display

- General
    - Beside the field name "(Resource name)" is displayed.
      - ✧ Resource name is displayed beside the field name. (e.g. "Date Created (Client) ")
    - Same as resource, 12 of the recently accessed report is displayed in the global menu.
  - Screen after the report execution
    - Id field is now a link and when it is clicked, the referenced data will open on a separate tab.
    - Numbers and currency data is now displayed with comma (,) every 3 digits.
    - The row color is added to make it easy to distinguish each line.
    - Temporarily changing the column width is now possible by hovering the mouse pointer between the fields and adjusting the width when the arrow mark replaces the pointer.
    - ~~Downloading upto 100,000 records using the report's "Download CSV" is now possible.~~  
(The proper display of the downloaded file relies on the PC that is currently being used)
- ※The release is postponed and we will schedule it again at another time.

- Graph
  - “Per Day” aggregation for date format is now possible.
  - In the graph setting, if an option type field is set in the grouping unit, the items in the legend is displayed using the order setting of the option type filed. (e.g. Items are ordered like the Process Phase)

## 1-D) Calendar Improvement

When displaying Phase and Process, showing only the latest phase can now be set.

### Home

Customize the calendar

< December 6 > Today

**Set the users to show:**

Show my events

Show other users events

**Set the events to show:**

Show the Activity

Show the following phases/Process ( Show only current phase)

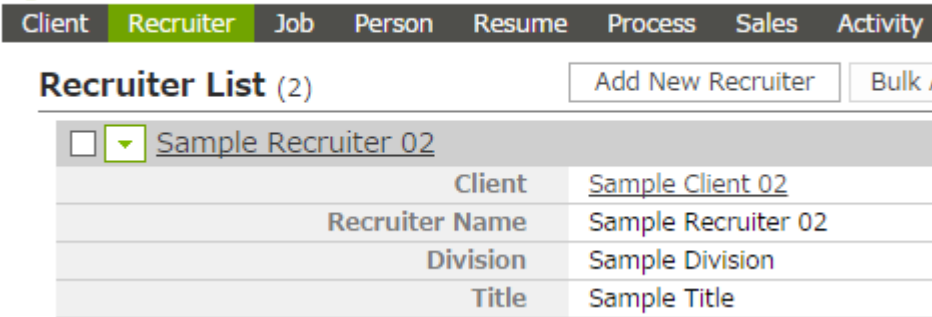
**Set the resources to show:**

Show this resources

Ok Cancel

By checking the “Show only current phase”, only the latest phase will be shown in the calendar.

## 1-E) Menu Color Change



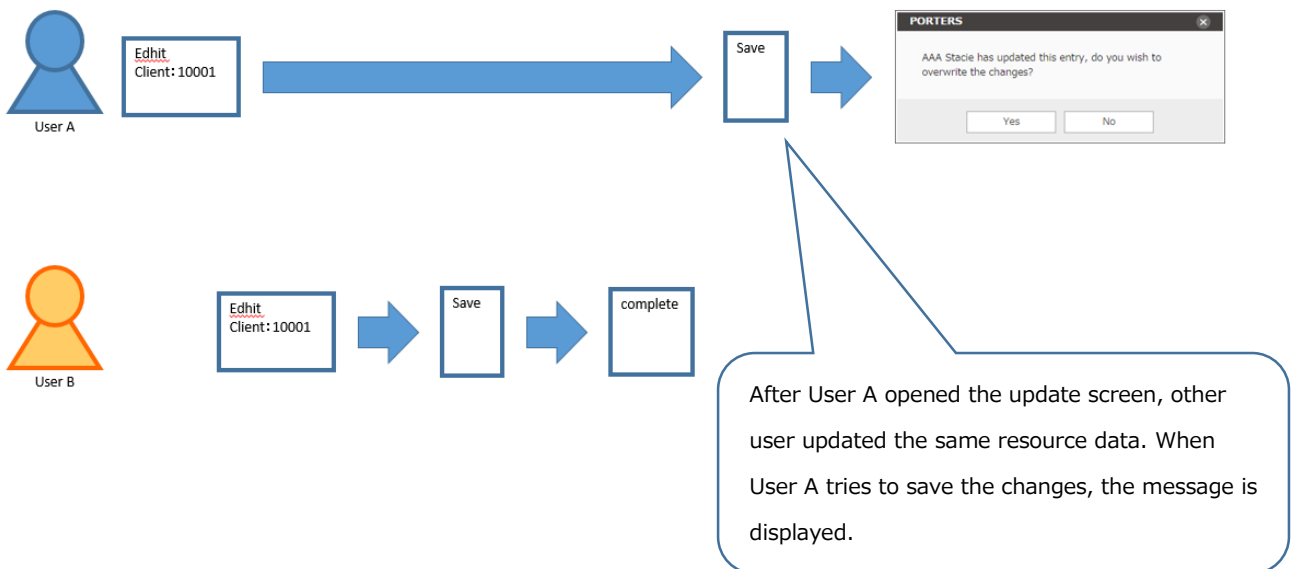
The base color of the menu is changed to easily distinguish the currently used menu.

## 1-F) Resource Overwrite Check

During a resource update, when a user tries to save changes to a record that is previously updated by other users, a message that asks if you want to overwrite the data is displayed.

To overwrite using the data on the screen, click 'Yes'.

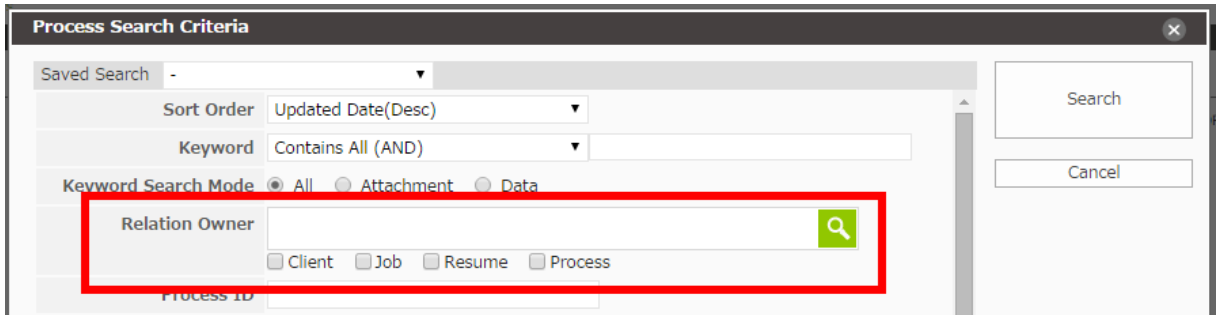
Otherwise, click 'No' to cancel and return to the data entry screen.



Overwrite check is only done when using the update screen.

## 1-G) Additional Process search criteria

From the Process search, the record owner of Client, Job, Resume and Process can now be searched by OR condition.

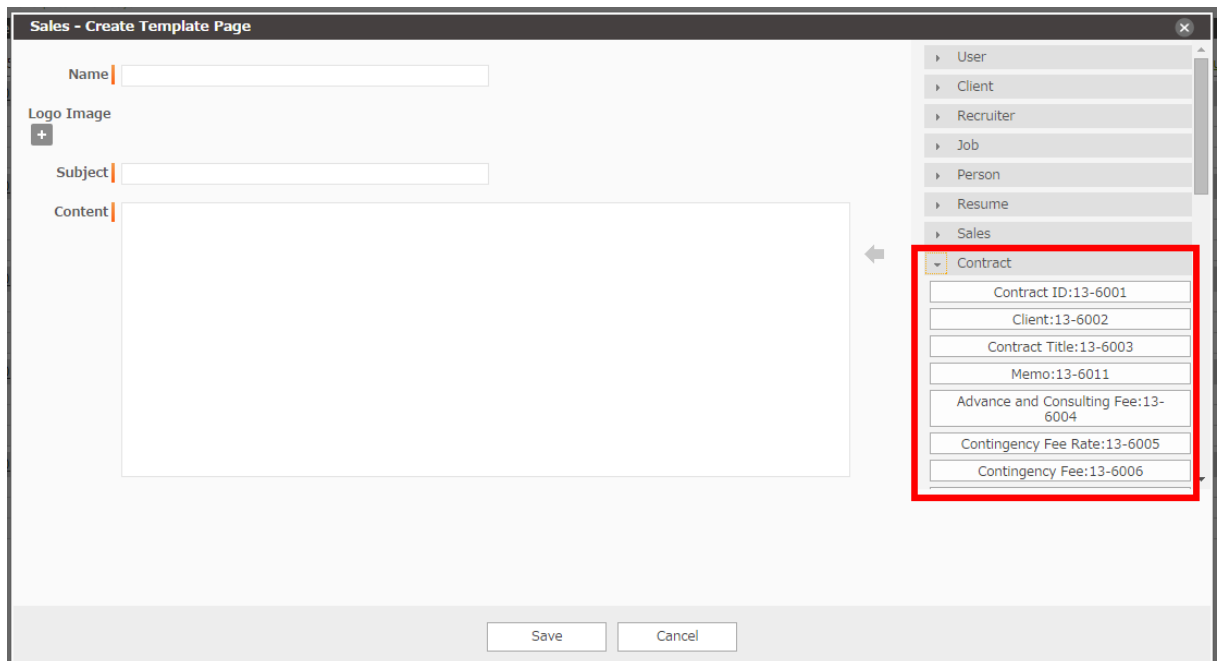


The screenshot shows the 'Process Search Criteria' dialog box. It features a 'Saved Search' dropdown, a 'Sort Order' dropdown set to 'Updated Date(Desc)', and a 'Keyword' dropdown set to 'Contains All (AND)'. Below these is the 'Keyword Search Mode' section with radio buttons for 'All', 'Attachment', and 'Data'. The 'Relation Owner' field is highlighted with a red box and contains a search icon. Below this field are four checkboxes: 'Client', 'Job', 'Resume', and 'Process'. To the right of the dialog are 'Search' and 'Cancel' buttons.

## 1-H) Sales Document Template

In the Sales document template, contract customized fields can now be set.

When setting the contract fields in the document template, only the data that has the contract information when creating or updating Sales record will appear. When the contract is not selected at the time of creation or update, blank will be displayed.



The screenshot shows the 'Sales - Create Template Page' dialog box. It has fields for 'Name', 'Logo Image' (with a plus icon), 'Subject', and 'Content'. On the right side, there is a dropdown menu with a list of categories: 'User', 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', and 'Contract'. The 'Contract' category is expanded, and its sub-items are highlighted with a red box: 'Contract ID:13-6001', 'Client:13-6002', 'Contract Title:13-6003', 'Memo:13-6011', 'Advance and Consulting Fee:13-6004', 'Contingency Fee Rate:13-6005', and 'Contingency Fee:13-6006'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

## 2-A) Dashboard (New Functionality)

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

### ➤ Opening 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.

The screenshot displays the PORTERS application interface. At the top left, the PORTERS logo is shown with the text "Trial expires in 191 days". A navigation bar contains the following items: Client, Recruiter, Job, Person, Resume, Process, Sales, Activity, and Report. Below the navigation bar, the word "Home" is displayed. The main content area features a calendar for December 6th. On the left side of the calendar, there is a vertical menu with two icons: a mail icon labeled "Mail" and a dashboard icon labeled "Dash board". The "Dash board" icon is highlighted with a red rectangular box.

	Sun 12/6	Mon 12/7	Tue 12/8	Wed 12/9
6:00				
7:00				
8:00				
9:00				
10:00				
11:00				
12:00				
13:00				

## ➤ Dashboard

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.

**A Phase history total count in specific period is displayed**

Job [My Departments records]		Resume		Process	
Open	Close	Entry	Open	Close	Matching
0 (3)	0 (3)	0 (1)	1 (5)	0 (0)	0 (3)
1st Interview		2nd Interview		Decision	
0 (1)		0 (0)		0 (1)	

\* The value for the previous period is shown in the brackets ( ), except when a custom range is selected.

**B Latest phase total count is displayed. Clicking the link will open the search result list.**

Job [My Departments records] (2015/12/08 16:17)			Resume [My Departments records] (2015/12/08 16:18)			Process [Stacie] (2015/12/08 16:18)		
Phase	Count	Client	Phase	Count		Process	Count	
Open	0	0	Entry	1		Matching	0	
Close	2	2	Open	6		Job Sent	2	
			Close	0		Recommend	1	
						1st Interview	0	
						2nd Interview	0	
						Decision	0	0
						Offer	0	0

**C Phase history count graph in specific period is displayed.**

Graph [This year] [Stacie] (2015/12/08 16:18) Settings

Phases: 2

Y-axis: 5, 4, 3, 2, 1, 0, -1

X-axis: 2011/01/01, 2012/01/01, 2013/01/01, 2014/01/01

Legend: Matching, Job Sent

※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



➤ 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.

The screenshot shows a 'Settings' dialog box with three main sections highlighted by red boxes and callouts:

- Aggregate by record owner:** Includes radio buttons for 'My records', 'My Departments records' (selected), and 'Other user's records (Choose)'. A callout says: "Select the owner of the record to aggregate."
- Choose an period Interval:** Includes radio buttons for 'This week (Sunday to Saturday)', 'This week (Monday to Sunday)', 'This week (Saturday to Friday)', 'This month', 'This year' (selected), and 'Custom range'. A callout says: "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."
- Choose Phases:** Includes a checked checkbox for 'Job' and a table of phases:
 

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

 A callout says: "Select the target phases to aggregate."

Buttons for 'Save' and 'Cancel' are at the bottom.

In the period, if the period such as “This year” is selected, the total count for the previous period is also displayed.

Example: “This week” is selected in the period.

**JOB**

Open
2
(0)

Callouts point to the '2' and '(0)' values:

- Total this week.
- Total last week.

➤ 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.

The screenshot shows a dialog box titled "Current Phase Settings" with a close button (X) in the top right corner. The dialog is divided into three main sections, each highlighted with a red border and a callout box:

- Aggregate by record owner:** This section contains three radio button options: "My records" (unselected), "My Departments records" (selected), and "Other user`s records (Choose)" (unselected). A callout box points to this section with the text: "Select the owner of the record to aggregate."
- Choose Phases:** This section contains a table with two columns: "Show" and "Phase".

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

A callout box points to this section with the text: "Selected the target phase to aggregate."
- Unique count by resource:** This section contains a checked checkbox labeled "Client". A callout box points to this section with the text: "In the case of Job, the unique client count of each phase can be computed and displayed. In the case of Process, the unique Job/Resume count can be computed and displayed."

At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

➤ 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.

The screenshot shows the 'Graph Settings' dialog box with three main sections highlighted by red boxes. Callouts provide instructions for each section:

- Aggregate by record owner:** Includes radio buttons for 'My records' (selected), 'My Departments records', and 'Other user`s records (Choose)'. A search icon is present. A callout says: "Select the owner of the record to aggregate."
- Choose an period:** Includes a section for 'Interval' with radio buttons for 'This week (Sunday to Saturday)', 'This week (Monday to Sunday)', 'This week (Saturday to Friday)', 'Quarter (Jan. - Mar. / Apr. - Jun. / Jul.', 'Quarter (Feb. - Apr. / May. - Jul. / Aug', 'Quarter (Mar. - May. / Jun. - Aug. / Sep', 'This month', and 'This year' (selected). A callout says: "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."
- Choose Phases:** Includes checkboxes for 'Job' and 'Resume'. Below each is a table with 'Show' and 'Phase' columns. For 'Job', 'Open' and 'Close' are checked. For 'Resume', 'Entry', 'Open', and 'Close' are checked. A callout says: "Select the target phase for the graph."

Buttons for 'Save' and 'Cancel' are at the bottom.

## Other bug fixes included in the release

- Report
  - Bug fix for the name display when creating a folder for personal use.
- Detail View
  - Bug fix for the display of the record owner in the Sales detail view when the related resource owner of a reference type (such as Resume Owner) is configured to be displayed.