

How to Change User Type

(System Administrator / Standard User)

HRBC Top Page

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, and user information (Catherine Porters). Below this is a main menu with options like Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The main content area shows a calendar for October 2014. A blue callout box labeled "Settings menu" points to a dropdown menu in the top right corner. This menu contains the following items: System Account, Company Profile, User, Department, Settings, IP Address Restriction, Duplicate check, Security Group, Customize, and another Customize option. A pink text box in the foreground provides details about the Settings menu.

Settings menu

The following functionalities are available under the “Settings” menu:
(For System Administrators only)

- Edit company profile
- Access User information management screen (Change user type / Login history check / User ID & Password notification / Force user logout)
- Edit user department
- IP address restriction settings
- Candidate duplicate check settings
- Access Customize screen

- ※ 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”.

User List View

PORTERS Trial expires in 597 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Sales Process Activity

User

	Name	Email	Department	User Type	Start Date	End Date	Last Login Date
▼	Catherine Porters	hrbc-support@porters.jp	N/A	System Administrator	2014/05/16		2014/10/28
▼	Nancy	nozomi.ishii@porters.jp	N/A	System Administrator	2014/05/19		2014/05/26
▼	Stacie	satoko.sakamaki@porters.jp	N/A	System Administrator	2014/05/19		2014/06/30
▼	Jack Porters	a@porters.jp	N/A	Standard User	2014/11/01		

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From the User List View, you can change the user type. The procedure is explained on the next slides.

- ※ System Administrator: Use of Settings menu and Apps menu is allowed.
- ※ Standard User: Use of the menus mentioned above is not allowed.

1) Access the User List View

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the logo 'PORTERS' is followed by 'Trial expires in 597 days'. The user 'Catherine Porters' is logged in, and the 'Apps' menu is open. The main navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The 'Home' page is active, showing a calendar for October 2014. A callout box with a green gradient background and a white border points to the 'User' option in the 'Settings' menu. The callout text reads: 'Click the "Settings" icon and select "User" from the menu.'

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Client Recruiter Job Person Resume Sales Process Activity

Home

Customize the calendar < October 2014 > Today Month Week Day

Sun 28 Mon 29 Tue 30 Wed 1 Thu 2 Fri 3 Sat 4

5 6 7 8 9

12 13 14 15 16

19 20 21 22 23 24 25

26 27 28 29 30 31 1

Information

Helpdesk

Phone: 050-... Fri 9:00-18:00

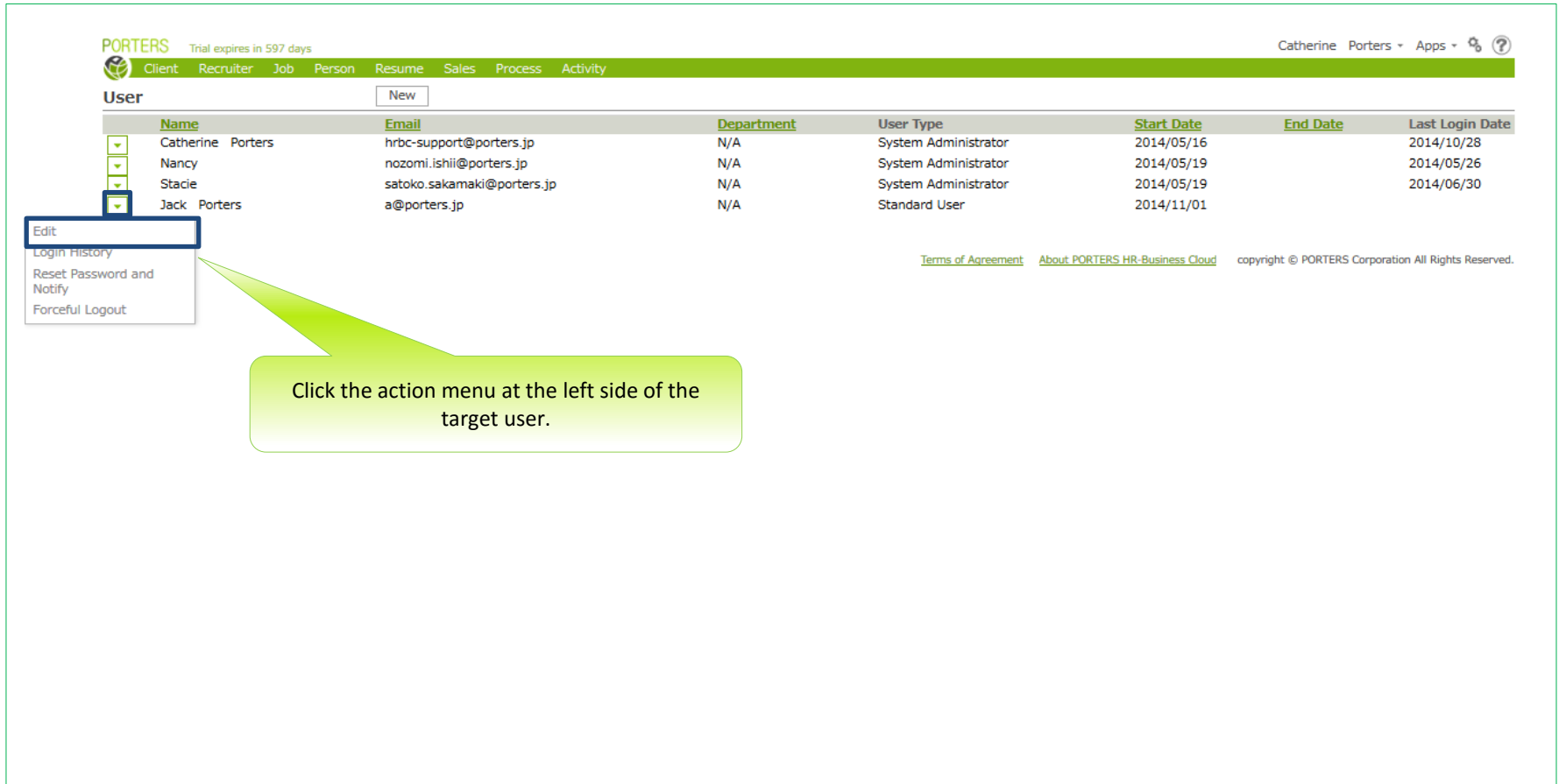
Email: ...

Settings

- System Account
- Company Profile
- User
- Department
- Settings
- IP Address Restriction
- Duplicate check
- Security Group
- Customize
- Customize

Click the "Settings" icon and select "User" from the menu.

2) Access the Edit User Information Dialog



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Client Recruiter Job Person Resume Sales Process Activity

User New

Name	Email	Department	User Type	Start Date	End Date	Last Login Date
Catherine Porters	hrbc-support@porters.jp	N/A	System Administrator	2014/05/16		2014/10/28
Nancy	nozomi.ishii@porters.jp	N/A	System Administrator	2014/05/19		2014/05/26
Stacie	satoko.sakamaki@porters.jp	N/A	System Administrator	2014/05/19		2014/06/30
Jack Porters	a@porters.jp	N/A	Standard User	2014/11/01		

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Edit
Login History
Reset Password and Notify
Forceful Logout

Click the action menu at the left side of the target user.

3.1) Select New Type

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the header includes the PORTERS logo, a trial expiration notice, and user information (Catherine Porters). A navigation bar contains tabs for Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The main content area shows a 'User' management section with a 'New' button and a table of users. A 'User - Edit' dialog box is open, showing fields for Name, Phone Number, Email, User Name, Default Language, Start Date, End Date, User Type, Created On, Updated On, Time zone, and checkboxes for 'Receive Mail Magazine' and 'Receive Important Notifications'. A callout bubble highlights the 'User Type' dropdown menu, which is currently set to 'Standard User'.

User - Edit

Basic Information

Name: [Field] Department: [N/A]

Phone Number: [Field]

Email: [Field]

User Name: Jack Porters Authorizer tag: [Field]

Default Language: English Time zone: (GMT+09:00) Tokyo Standard Time (Asia)

Start Date: 2014/11/01 End Date: [Field]

User Type: Standard User

Created by: N/A Catherine Porters

Updated by: N/A Catherine Porters

Created On: 2014/10/28 13:21:24

Updated On: 2014/10/28 13:21:24

Receive Mail Magazine:

Receive Important Notifications (E.G. Scheduled maintenance windows, etc):

Save Cancel

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3.2) Select New Type

User - Edit

Basic Information

Name: Jack Porters

Phone Number: 00-0000-0000

Email: a@porters.jp

User Name: Jack Porters

Default Language: English

Start Date: 2014/11/01

End Date: (GMT+09:00) Tokyo Standard Time (Asia)

User Type: System Administrator

Created On: 2014/10/28 13:21:24

Updated On: 2014/10/28 13:21:24

Created by: N/A Catherine Porters

Updated by: N/A Catherine Porters

Receive Mail Magazine:

Receive Important Notifications (E.G. Scheduled maintenance windows, etc):

Save Cancel

Name	Email	Department	User Type	Start Date	End Date	Last Login Date
Catherine Porters	hrbc-support@porters.jp	N/A	System Administrator	2014/05/16		2014/10/28
Nancy	nozomi.ishii@porters.jp	N/A	System Administrator	2014/05/19		2014/05/26
Stacie						
Jack Porters						2014/06/30

4) Change Verification

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Client Recruiter Job Person Resume Sales Process Activity

User

Name	Email	Department	User Type	Start Date	End Date	Last Login Date
▼ Catherine Porters	hrbc-support@porters.jp	N/A	System Administrator	2014/05/16		2014/10/28
▼ Nancy	nozomi.ishii@porters.jp	N/A	System Administrator	2014/05/19		2014/05/26
▼ Stacie	satoko.sakamaki@porters.jp	N/A	System Administrator	2014/05/19		2014/06/30
▼ Jack Porters	a@porters.jp	N/A	System Administrator	2014/11/01		

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The user type has been changed.

※The target user must logout and login to reflect this change.