

# How to Close User ID

## How to Close User ID

① Click the settings icon, then select the "User" item from the menu.

② Click the action menu associated with the user which you want to close and click "Edit" from the menu.

③ Enter the "End Date" and click "Save"

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, there is a navigation bar with tabs for Client, Recruiter, Job, Person, Resume, Process, Sales, and Activity. Below this, a 'User' section shows a list of users. The first user, Catherine Porters, is selected, and an action menu is open, showing options like 'Edit', 'Login History', 'Reset Password and Notify', and 'Forceful Logout'. The 'Edit' option is highlighted. To the right, a table lists user details:

User Type	Start Date	Login Date
System Administrator	2014/05/16	2015/07/17
System Administrator	2015/02/25	2015/07/16
System Administrator	2014/11/01	
Standard User	2014/11/25	
System Administrator	2014/05/19	2014/12/11
System Administrator	2014/05/19	2015/06/25
System Administrator	2014/05/19	2015/07/16
System Administrator	2015/02/27	2015/05/11

Below the table, a 'User - Edit' modal form is open, showing fields for Name, Department Name, Phone Number, Mobile Number, Email, User Name, Authorizer flag, Default Language, Time zone, Start Date, End Date, User Type, Created by, Updated by, Receive Mail Magazine, and Receive Important Notifications. The 'End Date' field is highlighted, and a calendar is open, showing the date 31/07/2015. The 'Save' button is also highlighted.

## ■ Precautions on User ID closure

☆ ID subscription fee is billed monthly, it cannot be per diem.

☆ If you are about to close User ID with system administrator privileges, please leave at least 1 User ID with system administrator privileges. If there is no User ID with administrator privileges, no one will be able to access the Settings or App Page.

☆ After you close the User ID, the history of resources (Job, resume, etc.) of that particular User such as: Owner, Created By, or Updated By will stay as it is.

However...

The options to select particular User name in Search, Created By, Updated By will not be available.

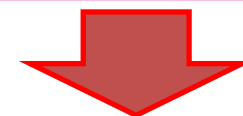
✘ During the Edit, if there is no change of Owner, it is possible to re-save the data with the same already closed User ID.



**You will not be able to Search resource with the already closed User information in the Owner, Created By and/or Edited By.**

We recommend you to link (change the owner of) the planned to be closed User ID's data to a different User ID before closing it.

**Steps to Change User ID Owner**



## Steps to Change User ID Owner ~e.g. JOB~ 【1/2】

Job List Search Criteria

Sort Order: Updated Date(Desc)

Keyword: Contains All (AND)

Keyword Search Mode: All (selected), Attachment, Data

Process(End Flag Excluded): Contains Any (OR)

Matching, Job Sent, Recommend, 1st Interview, 2nd Interview, Decision, Offer

Pinned

Job ID

Client: ID, Text (selected)

Recruiter: ID, Text (selected)

**Job Owner: N/A Catherine Porters**

Phase: Contains Any (OR)

Open, Close

Search

Cancel

① [Search Criteria]  
Input the "Job Owner" with to be closed User ID and click the "Search"

PORTERS Trial expires in 335 days

Client Recruiter Job Person Resume Process Sales Activity

Job List (9) Filter

Add New Job Bulk Action

Update (selected)

Export

Delete

Open(1) Close(3)

Sample Job 02(JobId:10002)

Matching 1

Client	Sample Client 02
Position	Sample Job 02(JobId:10002)
Salary Details	Sample Salary Details
Work Location	Tōkyō
Permission	Publish (Real Name)
Job Owner	N/A Catherine Porters

Matching

② [Search List]  
Bulk Action > Up date

## Steps to Change User ID Owner ~e.g. JOB~ 【2/2】

**Job - Bulk Update (1/2)**

Select the bulk update target [Help](#)

- All Items (matching search criteria)
- Displayed Items
- Selected Items

③ Select "All items"

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**Job - Bulk Update (2/2)**

Please click the field item to be bulk updated. [Help](#)

Basic Information

- Recruiter
- Position
- Job Owner**
- Phase (latest)
- Phase Date (latest)
- Phase Memo (latest)
- Department

Job Information

- Permission
- Job Summary
- Job Category

Job Owner | John Ito

Append data to existing data  Overwrite the existing data

④ Click "Job Owner" >Click the pencil sign and select the to be assigned new Job owners name

For system administrator

- Apply the access privileges of the field and flow co
- Do not apply the access privileges of the field

⑤ Click "OK"

Previous Next **OK** Cancel