

How to Manage Phase

1) Edit Record

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 is a 'Job List (8)' section with a 'Filter' button and 'Add New Job' and 'Bulk Action' buttons. A table of job records is shown, with 'Sample Job 03' selected. An action menu is open for 'Sample Job 03', with the 'Edit' option highlighted in a red box. A callout bubble points to the 'Edit' option with the text: 'Click the action menu and select "Edit" from the menu.' Another red dashed box highlights the 'Phase' and 'Open' columns for 'Sample Job 03', showing 'Phase: Open' and 'Phase Date: 2014/05/23 21:15:00'. Below this, 'Sample Job 01' is also visible with its own action menu open.

Job	Client	Phase	Open
Sample Job 03	Sample Client 01	Open	2014/05/23 21:15:00
Sample Job 04	Sample Client 01		
Sample Job 01	Sample Client 01	Close	2014/10/31 17:00:00

- ※ 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".

2) Display Phases

The screenshot shows the 'Job - Edit' interface in the PORTERS HR-Business Cloud. The 'Phase(Current)' dropdown menu is highlighted with a red box, and a callout bubble points to it with the text 'Click the "Phase(Current)" dropdown.' The form is divided into several sections:

- Basic Information:** Job ID (10003), Client (Sample Client 01), Recruiter (Sample Recruiter 01), Position (Sample Job 03), Phase(Date) (2014/05/23 21:15:00), Phase Memo (Current), and Job Owner (N/A Catherine Porters).
- Contact Information:** Telephone (Recruiter) (00-0000-0000), Fax (Recruiter) (00-0000-0000), E-mail (Recruiter) (sample@porters.jp), Mobile (Recruiter) (090-0000-0000), Mobile E-mail (Recruiter) (sample@porters.jp), Zip Code (Recruiter) (000-0000), and Address (Recruiter) (Sample Address (Recruiter)).
- Job Information:** Permission (Publish (Real Name) selected, Publish (Anonymous), No Publish) and Job Summary (Sample Job Summary).

At the bottom of the form, there is a 'Send notification email' link and 'Save' and 'Cancel' buttons.

3) Select Phase

Choose the "Phase" that you want to change.

✘The available phases can be customized under the Phase Option settings under the Customize screen.

4) Edit Phase Date

Click the Calendar Entry dialog, then select the date.

- ※The month and year can be selected using the dropdown.
- ※By clicking the clock icon, the current date and time will be entered.

5) Phase Memo

The screenshot shows the 'Job - Edit' form in the PORTERS HR-Business Cloud interface. The form is divided into several sections:

- Basic Information:** Includes fields for Job ID (10003), Client (Sample Client 01), Recruiter (Sample Recruiter 01), Position (Sample Job 03), and Job Owner (N/A Catherine Porters).
- Phase Information:** Includes Phase(Current) (Close), Phase Date(Current) (2014/10/31 21:15 NOW), and Phase Memo(Current) (We finished recruitment of employees.).
- Contact Information:** Includes Telephone (Recruiter), Fax (Recruiter), E-mail (Recruiter), and Mobile (Recruiter).
- Job Information:** Includes Job Title and Job Status.

A green callout bubble contains the following text:

Enter a phase memo in "Phase Memo(Current)" if necessary.

Once the changes are set, click the "Save" button.

The 'Save' button at the bottom of the form is highlighted with a red box.

6) Verify Data

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 is a 'Job List (8)' section with a 'Filter' button and 'Add New Job' and 'Bulk Action' buttons. The main content area shows a list of jobs, each with a 'Job Sent' count and a 'Matching' status. A red box highlights the phase information for 'Sample Job 03', which is 'Close' with a phase date of '2014/10/31 21:15:00' and a phase memo of 'We finished recruitment of employees.' A green callout box points to this information, stating: 'The new Phase information is now reflected on the list view.'

Client	Sample Client 01	Phase	Close
Position	Sample Job 03	Phase Date	2014/10/31 21:15:00
Salary Details	Sample Salary Details	Phase Memo	We finished recruitment of employees.
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Client	Sample Client 01	Phase	Close
Position	Sample Job 01	Phase Date	2014/10/31 17:00:00
Salary Details	Sample Salary Details	Phase Memo	
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

7) Phase History

PORTERS Trial expires in 329 days

Client Recruiter Job Person Resume Process Sales Activity

Job List (8) Filter Add New Job Bulk Action Job | Sample Job 03 (10003) | (0)

Industry Category Software/Information Processing, IT/Telecommunications

Print View

Open(0) Close(3)

Sample Job 03

Job Sent 3

Client Sample Client 01
Position Sample Job 03
Salary Details Sample Salary Details
Location Tōkyō

Job Owner N/A Catherine Porters

Matching

Sample Job 01

Job Sent 1 1st Interview 1 Decision 1

Client Sample Client 01
Position Sample Job 01
Salary Details Sample Salary Details
Work Location Tōkyō
Permission Publish (Real Name)
Job Owner N/A Catherine Porters

Matching

Sample Job 02

Matching 1

Sublist | Attachments

ID	File Name	File Size	Updated By	Date Updated
3	Job Description.pdf	17.474KB	N/A Catherine Porters	2014/10/30 14:42:07

Sublist | Phase History Add New

Date	Phase	Memo	Updated By	Date Updated
2014/10/31 21:15:00	Close	We finished recruitment of employees.	N/A Stacie	2015/07/23 21:32:32
2014/05/23 21:15:00	Open		N/A Stacie	2015/07/23 21:25:08

Sublist | Process Add New Bulk Action Process List

Process ID	Resume Title	Process	Process Date	Process Memo	End Flag	Process Owner	Date Updated
10019	Meg Tanaka(10009)	Job Sent	2015/07/23 11:55:00				2015/07/23 11:56:09
10004	Hanako Yamada(10003)	Job Sent	2014/06/20 14:52:00				2015/07/22 19:00:14
10006	Tommy Febur...	Job Sent	2014/10/29 1...				2014/10/29 1...

To display the detail view, click the title.

The phase changes can be viewed via "Phase History" in the "Sublist Phase History."
✂ In case if the Phase History list is not up to date, click the refresh button