

How to Update Multiple Records

1) Select Target Records

Job List (3) Filter + Add New Job Bulk Action -

Open(3) Close(0)

Sample Job 01 -

Matching 1 > Recommend 1 > 1st Interview 1 > 2nd Interview > Decision 1 > Offer >

Client [Sample Client 01](#)

Salary Details Sample Salary Details

Work Location Tōkyō

Permission Publish (Real Name)

Job Owner N/A Catherine Porters

Sublist

Sample Job 03 -

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

Client [Sample Client 01](#)

Position Sample Job 03

Salary Details Sample Salary Details

Work Location Tōkyō

Permission Publish (Real Name)

Job Owner N/A Catherine Porters

Sublist

Bulk Update can be performed from the List View of each global menu item.

■ Bulk Update can be performed using these 3 patterns:

1. All Items (Matching Search Criteria)
The count of the target items is the “●●” in the “Job List(●●)” located at the upper left corner of the screen
✂ In our example, the target count is 3.
2. Displayed Items
The default number of displayed items in the List View screen is 50. Those 50 items are the target records.
When the “more” link at the bottom of the page is clicked, an additional 50 items will be displayed. Therefore, the number of bulk update target records also increases at the same time.
3. Selected Items
The target items are the records with checks.

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✂ 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) Launch Bulk Update dialog

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The 'Job List' section shows three jobs: 'Sample Job 01', 'Sample Job 02', and 'Sample Job 03'. Each job has a 'Bulk Action' dropdown menu, and the 'Update' option is highlighted in the first one. A callout box points to the 'Update' option with the text: 'After selecting the target records, Click "Bulk Action" and select the "Update" item.'

PORTERS Trial expires in 594 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action Update Export Delete Customize View

Open(3) Close(0)

Sample Job 01 Matching Job Sent 1 Recommend 1st Interview 2nd Interview

Client Sample Client 01 Phase Open
Position Sample Job 01 Phase Date 2014/10/29 17:03:00
Salary Details Sample Salary Details Phase Memo Sample Phase Memo
Work Location Tōkyō
Permission Publish (Real Name)
Job Owner N/A Catherine Porters

Sublist

Sample Job 02 Matching 1 Job Sent Recommend 1st Interview 2nd Interview Decision

Client Sample Client 02 Phase Open
Position Sample Job 02 Phase Date 2014/10/30 16:46:00
Salary Details Sample Salary Details Phase Memo Sample Phase Memo
Work Location Tōkyō
Permission Publish (Real Name)
Job Owner N/A Catherine Porters

Sublist

Sample Job 03 Matching 2 Job Sent 2 Recommend 1st Interview 2nd Interview Decision Offer

Client Sample Client 01 Phase Open
Position Sample Job 03 Phase Date 2014/10/30 16:46:00
Salary Details Sample Salary Details Phase Memo
Work Location Tōkyō
Permission Publish (Real Name)
Job Owner N/A Catherine Porters

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3) Select Target

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action Customize View

Open(3) Close(0)

Sample Job 01 Matching Job Sent 1 Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner Sublist

Sample Job 02 Matching Job Sent 1 Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner Sublist

Sample Job 03 Matching Job Sent 2 Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner Sublist

Job - Bulk Update (1/2)

Select the bulk update target

All Items (matching search criteria)

Displayed Items

Selected Items

Previous Next OK Cancel

Select "Selected Items" and click the "Next" button.

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4) Select Fields

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the logo 'PORTERS HR-Business Cloud' is visible. The main navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The user is logged in as 'Catherine Porters'. The 'Job List' section shows three sample jobs: 'Sample Job 01', 'Sample Job 02', and 'Sample Job 03'. A 'Job - Bulk Update (2/2)' dialog box is open, prompting the user to 'Please click the field item to be bulk updated.' The dialog box contains two sections: 'Basic Information' and 'Job Information'. The 'Basic Information' section includes fields for 'Recruiter', 'Position', 'Job Owner', 'Phase (latest)', 'Phase Date (latest)', and 'Phase Memo (latest)'. The 'Job Information' section includes fields for 'Permission', 'Job Summary', 'Job Category', and 'Business Summary'. The 'Phase (latest)' field is highlighted with a blue border, and a callout bubble points to it with the text 'Click on "Phase (latest)"'. The dialog box also has 'Previous', 'Next', 'OK', and 'Cancel' buttons at the bottom.

5) Enter Information and Execute

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the user is logged in as Catherine Porters. The main navigation bar includes options like Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The 'Job List' section shows three jobs: Sample Job 01, Sample Job 02, and Sample Job 03, all of which are selected. A 'Job - Bulk Update (2/2)' dialog box is open in the center. The dialog box has a title bar and a close button. Below the title bar, there is a message: 'Please click the field item to be bulk updated.' followed by a 'Help' link. The dialog box is divided into two main sections: 'Basic Information' and 'Job Information'. The 'Basic Information' section is expanded and contains several fields: 'Recruiter', 'Position', 'Job Owner', 'Phase (latest)', 'Phase Date (latest)', and 'Phase Memo (latest)'. The 'Phase (latest)' field is highlighted with a blue border and contains the text 'Close'. The 'Phase Date (latest)' field contains '2014/10/31 17:00' and a clock icon. The 'Job Information' section is collapsed and contains 'Permission', 'Job Summary', 'Job Category', and 'Business Summary'. At the bottom of the dialog box, there are four buttons: 'Previous', 'Next', 'OK', and 'Cancel'. The 'OK' button is highlighted with a blue border. A green callout box with a white background and a green border points to the 'Phase (Update)' field. The callout box contains the text: 'After the Edit dialog appears, please set the contents of the update. Then click the "OK" button.' In the bottom right corner of the interface, there are links for 'Terms of Agreement' and 'About PORTERS HR-Business Cloud', and a copyright notice: 'copyright © PORTERS Corporation All Rights Reserved.'

6) Confirmation

The screenshot displays the PORTERS HR-Business Cloud interface. A 'Job - Bulk Update (2/2)' dialog box is open, prompting the user to click a field item to be bulk updated. The dialog shows a list of fields under 'Basic Information' and 'Job Information'. A confirmation dialog is also visible, asking 'Do you want to execute the update?' with 'Yes' and 'No' buttons. A yellow callout box highlights the 'Yes' button with the text 'Click the "Yes" button to continue with the execution.' and a caution note: '⚠ Caution: This process can't be undone.' The background shows a 'Job List' with three sample jobs selected.

PORTERS HR-Business Cloud

Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action Customize View

Open(3) Closed(1)

Sample Job 01 Matching Job Sent Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner Sublist

Sample Job 02 Matching Job Sent Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner Sublist

Sample Job 03 Matching Job Sent Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner Sublist

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)

Job Information

Permission

Job Summary

Job Category

Business Summary

Phase (Update) Close

Phase Date (Update) 2014/10/

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Do you want to execute the update?

Yes No

For system administrator

Apply the access privileges of the field and flow control of phase

Do not apply the access privileges of the field and flow control

Previous Next OK Cancel

Click the "Yes" button to continue with the execution.

⚠ Caution: This process can't be undone.

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7) Notification

The screenshot displays the PORTERS HR-Business Cloud interface. A 'Job - Bulk Update (2/2)' dialog box is open, showing a list of fields to be updated: Recruiter, Position, Job Owner, Phase (latest), Phase Date (latest), Phase Memo (latest), Permission, Job Summary, Job Category, and Business Summary. The 'Phase (Update)' field is selected, with 'Close' as the value and '2014/10/31 17:00' as the 'Phase Date (Update)'. Below the dialog, a confirmation pop-up asks 'Bulk update is done. Do you want to update more?' with 'Yes' and 'No' buttons. A yellow callout bubble points to the 'No' button, containing the text: 'Click the "Yes" button to update more. Otherwise, if you are finished with the update, click "No".'

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter Add New Job Bulk Action

Open(3) Close

Sample Job 01 Matching Job Sent Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner

Sublist

Sample Job 02 Matching Job Sent Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner

Sublist

Sample Job 03 Matching Job Sent Recommend 1st Inter Client Position Salary Details Work Location Permission Job Owner

Sublist

Job - Bulk Update (2/2)

Please click the field item to be bulk updated.

Basic Information

Recruiter

Position

Job Owner

Phase (latest)

Phase Date (latest)

Phase Memo (latest)

Job Information

Permission

Job Summary

Job Category

Business Summary

Phase (Update) Close

Phase Date (Update) 2014/10/31 17:00

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Bulk update is done. Do you want to update more?

Yes No

For system administrator

Apply the access privileges of the field and flow control of phase

Do not apply the access privileges of the field and flow control

Previous Next OK Cancel

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8) List View after Bulk Update

When Bulk Update is performed, this icon is displayed at the upper right corner of the HRBC screen.

After the Bulk Update, the List View is displayed. At this point, Bulk Action is not yet finished so old information is displayed.

The screenshot shows 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 'Job List (3)' section with a 'Filter' icon and 'Add New Job' and 'Bulk Action' buttons. A callout points to a small icon in the top right corner, stating: 'When Bulk Update is performed, this icon is displayed at the upper right corner of the HRBC screen.'

The job list contains three entries, each with a 'Sublist' button and a 'Phase' table. A callout points to the first job entry, stating: 'After the Bulk Update, the List View is displayed. At this point, Bulk Action is not yet finished so old information is displayed.'

Job ID	Client	Position	Phase	Phase Date	Phase Memo
Sample Job 01	Sample Client 01	Sample Job 01	Open	2014/10/29 17:03:00	Sample Phase Memo
Sample Job 02	Sample Client 02	Sample Job 02	Open	2014/10/30 16:46:00	Sample Phase Memo
Sample Job 03	Sample Client 01	Sample Job 03	Open	2014/10/30 16:46:00	Sample Phase Memo

At the bottom of the page, there are links for 'Terms of Agreement', 'About PORTERS HR-Business Cloud', and a copyright notice: 'copyright © PORTERS Corporation All Rights Reserved.'

9) Confirm Completion

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the user is logged in as Catherine Porters. The main navigation bar includes options like Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The 'Job List' section shows three sample jobs. A notification box titled 'Job - Bulk Update Complete' is overlaid on the interface, indicating the start and end times of the update. A blue box highlights the 'Confirm results' button within this notification. A green callout box provides instructions on how to interact with the notification icon.

Job - Bulk Update Complete
Start time 2014/10/31 13:21
End time 2014/10/31 13:21
[Confirm results](#)

The icon will blink when Bulk Update is completed. Click the icon, and inside it, click "Confirm results" to display the results of the operation.

Client	Sample Client 01	Phase	Open
Position	Sample Job 01	Date	2014/10/29 17:03:00
Salary Details	Sample Salary Details	Memo	Sample Phase Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Client	Sample Client 02	Phase	Open
Position	Sample Job 02	Date	2014/10/30 16:46:00
Salary Details	Sample Salary Details	Memo	Sample Phase Memo
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

Client	Sample Client 01	Phase	Open
Position	Sample Job 03	Phase Date	2014/10/30 16:46:00
Salary Details	Sample Salary Details	Phase Memo	
Work Location	Tōkyō		
Permission	Publish (Real Name)		
Job Owner	N/A Catherine Porters		

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10) Result

PORTERS HR Business Cloud

Job bulk update results

Start time: 2014/10/31 13:23

End time: 2014/10/31 13:23

Number of success: 3

Number of failure: 0

Target field: Phase is updated to Close; Phase Date is updated to 2014-10-31 17:00:00

The result of the Bulk Update is displayed in a separate window.

11) Error

PORTERS HR Business Cloud

Job bulk update results

Start time: 2014/10/31 13:27
End time: 2014/10/31 13:27
Number of success: 0
Number of failure: 3
Target field: Phase is updated by Group, Phase Date is updated by 2014-10-29 09:09:09

ID	Code	Error details
10001	126	Phase Date must be more recent than the current Phase Date
10002	126	Phase Date must be more recent than the current Phase Date
10003	126	Phase Date must be more recent than the current Phase Date

In case Bulk Update is not completely successful, error information is also displayed in the result page. Please perform bulk update again after fixing the problem.

- ※ It is possible to click the links and fix the problem.
- ※ As seen in the sample image, the problem is that the Phase Date is older than the date of the latest phase.