How to View Data

PORTERS HR-Business Cloud

PORTERS Trial expires in 314 days

Catherine Porters   Apps ▾ ⚙ ❓

Client Recruiter Job Person Resume Process Sales Activity

- Search
- New
- Saved Search
- **All Client** ⬈
- My Client
- Recently Accessed
- Sample Client 01
- Sample Client 02
- Import
- Import Client
- Import Contract

◀ August 2015 ▶ Today   Month | Week | Day

Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	
				7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	
23	24	25	26	27	28	
30	31	1	2	3	4	

Mail

To display the information registered in HRBC, please click the global menu.
In this example, click "All Client".

Information   Refresh

2015-08-06 14:25:28
【Important Notice】 Maintenance Report

Due to system maintenance, services will be temporarily su
spended during the following period.
We appreciate your understanding and we apologize for any
inconvenience this may cause.

_____

[Schedule]
August 9,2015 21:00 ～ August 10,2015 07:30 (Japan tim
e)

*HRBC service will be temporarily unavailable during the ti
me mentioned above.
Also, if there are bulk operations running (i.e. Import, Expor
t, Bulk Delete, Bulk Mail),
please be advised that there is possibility that it will be inter
rupted.
*API, Webparts, Third Party Applications services are not af
fected and can be used.

■Search
You can view the data that matches the specified search criteria.

■Saved Search
If you frequently uses the same search criteria, save it, therefore you can view the data simply by clicking it.
※The maximum number of displayable menu is 5

■Recently Accessed
Recently created, edited, and opened data are displayed. If you click it, the corresponding data will be displayed in the List View
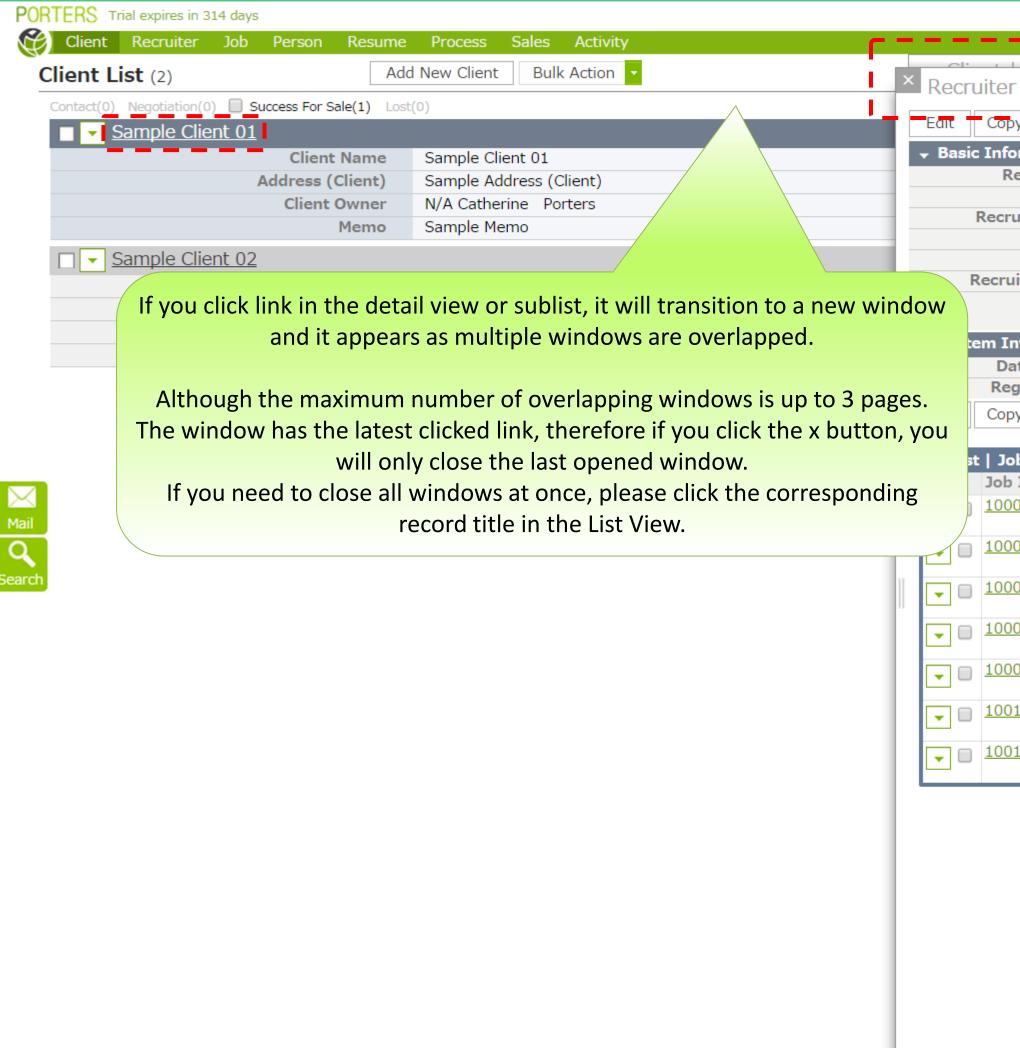※The maximum number of item can be displayed in the menu is 12.

※ This screenshot might be different than the actual screen.
※ The global menu: name, sorting order, view/hidden can be changed for each company, therefore it might be different than this manual.

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Client   Recruiter   Job   Person   Resume   Process   Sales   Activity

Client List (2)

Add New Client

Customize View

Contact(0)   Negotiation(0)   ☐ Success For Sale(1)   Lost(0)

☐ ▾ Sample Client 01

| Clien... | Sample Client 01 | Phase | |
| Address (C... | ...ess (Client) | Phase Date | |

☐ ▾ Sample Cli...

| | | Phase | Success For Sale |
| | | Phase Date | 2014/05/16 00:00:00 |

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Mail

Search

Number of data that matches the condition

In this phase selection, the number of data registered in the latest phase is displayed.
If you check the checkbox, you can filter the data, and if you uncheck it you will return to the original list view.

※This only counts the number of latest phase, the previous ones are not counted.

【List View】
List View shows maximum of 50 items.
If there are more than 50 items, there will be
"See more" button on the lower left of the screen. If you click it, List View will further display another 50 items.

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On the list view, if you double click the title bar, you can collapse the info. If you double click the title bar again, you will expand the info back to original.

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Client | Recruiter | Job | Person | Resume | Process | Sales | Activity

Client List (2)

Add New Client | Bulk Action ▾

Contact(0) Negotiation(0) ☐ Success For Sale(1) Lost(0)

☐ ▾ Sample Client 01
- Detail
- Edit
- Copy
- Delete
- Docu...
- Ema...
- Goo...
- Yah...
- Add...

Client Name: Sample Client 01
Address (Client): Sample Address (Client)
Client Owner: N/A Catherine Porters
Memo: Sample Memo

Mail

Search

If you click the Client name or "Detail" in the action menu, you will see the details and sublist (related information) of the Client on right side.

Client | **Sample Client 01 (10001)**

Print View

Edit | Copy | Delete | Document | Email | Google Search | Yahoo Search | Add Activity

▾ **Basic Information**
Client ID: 10001
Client Name: Sample Client 01
Client Owner: N/A Catherine Porters
Memo: Sample Memo
Phone (Client): 00-0000-0000
Fax (Client): 00-0000-0000

▾ **Opportunity**
Phase (Current):
Phase Date (Current):
Phase Memo (Current):

▾ **System Information**
Date Created: 2014/05/16 13:23:52
Registered by: N/A Catherine Porters
Date Updated: 2014/11/27 14:55:50
Updated by: N/A Stacie

Edit | Copy | Delete | Document | Email | Google Search | Yahoo Search | Add Activity

If you click the "Print View", you can printout the detailed and sublist information altogether.

Detail

※If you double click the group name's gray bar, you can collapse the display.
(System information, etc.)

Sublist | Activity ↻ Add New

	Activity ID	From	Title	Memo	Activity Owner	Date Updated
▾	10015	2014/10/30 17:15:00	Call	Answering machine	N/A Catherine Porters	2014/10/30 17:16:29

Sublist | Phase History ↻ Add New

Sublist | Job ↻ Add New | Bulk Update | Job List ⤢

		Job ID	Position	Phase		Date Updated
▾	☐	10001	Sample Job 01	Close		2015/07/30 07:39:48
▾	☐	10003	Sample Job 03	Close		2015/07/23 21:32:32
▾	☐	10007	Sample Job 04		N/A Catherine Porters	2015/07/23 11:46:23
▾	☐	10008	Sample Job 05(JobId:10008)		N/A Catherine Porters	2014/12/09 11:24:47
▾	☐	10009	Sample Job 06(JobId:10009)		N/A Catherine Porters	2014/12/09 11:24:35
▾	☐	10010	Sample Job 07(JobId:10010)		N/A Catherine Porters	2014/12/09 11:24:25
▾	☐	10011	Sample Job 08(JobId:10011)		N/A Catherine Porters	2014/12/09 11:24:15

Sublist (Related) Information

※Sublist information is displayed up to 30 each. If you need to display more information, please click the "See more" on the lower left of the screen.

Sublist | Recruiter ↻ Add New | Bulk Update | Recruiter List ⤢

		Recruiter ID	Recruiter Name	Division	Title	Telephone (Recruiter)	E-mail (Recruiter)	Date Updated
▾	☐	10001	Sample Recruiter 01	Sample Division	Sample Title	00-0000-0000	sample@porters.jp	2014/05/16 04:23:52

Sublist | Sales ↻ Add New | Sales List ⤢

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Client Recruiter Job Person Resume Process Sales Activity

Client List (2)

Add New Client | Bulk Action ▾

Contact(0) Negotiation(0) ☐ Success For Sale(1) Lost(0)

☐ ▾ Sample Client 01

Client Name	Sample Client 01
Address (Client)	Sample Address (Client)
Client Owner	N/A Catherine Porters
Memo	Sample Memo

☐ ▾ Sample Client 02

✉ Mail

🔍 Search

If you click link in the detail view or sublist, it will transition to a new window and it appears as multiple windows are overlapped.

Although the maximum number of overlapping windows is up to 3 pages.
The window has the latest clicked link, therefore if you click the x button, you will only close the last opened window.
If you need to close all windows at once, please click the corresponding record title in the List View.

✕ Recruiter | **Sample Recruiter 01 (10001)** | ✉ (10)

🖨 Print View

Edit | Copy | Delete | Document | Send Email | Google Maps | facebook Search | LinkedIn Search

▾ Basic Information

Recruiter ID	10001	Zip Code (Recruiter)	000-0000
Client	Sample Client 01	Address (Recruiter)	Sample Address (Recruiter)
Recruiter Name	Sample Recruiter 01	Telephone (Recruiter)	00-0000-0000
Division	Sample Division	Fax (Recruiter)	00-0000-0000
Title	Sample Title	E-mail (Recruiter)	sample@porters.jp
Recruiter Owner	N/A Catherine Porters	Mobile (Recruiter)	090-0000-0000
Memo	Sample Memo	Mobile E-mail (Recruiter)	sample@porters.jp

em Information

Date Created	2014/05/16 04:23:52	Date Updated	2014/05/16 04:23:52
Registered by	N/A Catherine Porters	Updated by	N/A Catherine Porters

Copy | Delete | Document | Send Email | Google Maps | facebook Search | LinkedIn Search

st | Job ↻ | Add New | Bulk Update | Job List ⤢

Job ID	Position	Phase	Phase Date	Job Owner	Date Updated
10001	Sample Job 01	Close	2014/10/31 17:00:00	N/A Catherine Porters	2015/07/30 07:39:48
10003	Sample Job 03	Close	2014/10/31 21:15:00	N/A Catherine Porters	2015/07/23 21:32:32
10007	Sample Job 04			N/A Catherine Porters	2015/07/23 11:46:23
10008	Sample Job 05(Job Id:10008)			N/A Catherine Porters	2014/12/09 11:24:47
10009	Sample Job 06(Job Id:10009)			N/A Catherine Porters	2014/12/09 11:24:35
10010	Sample Job 07(Job Id:10010)			N/A Catherine Porters	2014/12/09 11:24:25
10011	Sample Job 08(Job Id:10011)			N/A Catherine Porters	2014/12/09 11:24:15