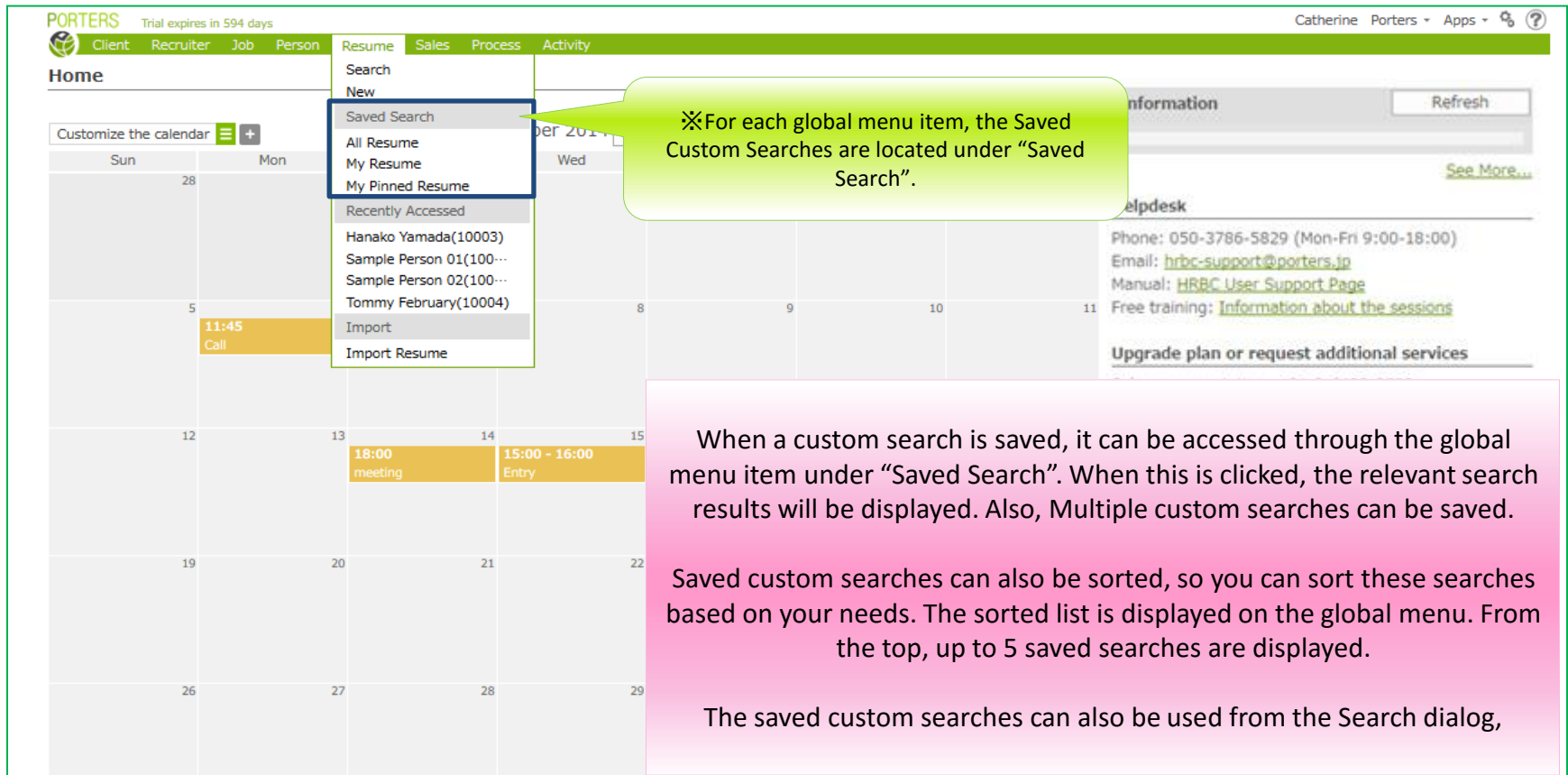


# How to Save Custom Search Conditions

## 1) Saved Search



The screenshot shows the PORTERS HR-Business Cloud interface. The top navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The 'Resume' menu is open, showing options like 'Search', 'New', 'Saved Search', 'All Resume', 'My Resume', 'My Pinned Resume', 'Recently Accessed', and 'Import Resume'. A callout box points to the 'Saved Search' item with the text: "※For each global menu item, the Saved Custom Searches are located under 'Saved Search'".

When a custom search is saved, it can be accessed through the global menu item under "Saved Search". When this is clicked, the relevant search results will be displayed. Also, Multiple custom searches can be saved.

Saved custom searches can also be sorted, so you can sort these searches based on your needs. The sorted list is displayed on the global menu. From the top, up to 5 saved searches are displayed.

The saved custom searches can also be used from the Search dialog,

- ※ 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) Save: Launch Search Dialog

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the navigation bar includes the PORTERS logo, a trial expiration notice, and user information (Catherine Porters). The main menu features tabs for Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The 'Resume' tab is selected, and a dropdown menu is open, showing options like 'Search', 'New', 'Saved Search', and 'Recently Accessed'. A callout box points to the 'Search' option in the dropdown.

As an example, we will create a custom search that will search the "Current Month's Registrant" under Resume.

Click "Search" which is located under each global menu item.

The interface also shows a calendar view with various events and a sidebar with information and helpdesk links.

## 3) Save: Set Condition - 1

PORTERS Trial expires in 594 days  
Client Recruiter Job Person

Resume List

Resume List Search Criteria

Saved Search -

Other (Creative Jobs)

Consulting

IT Systems Consultant  Strategy/Management Consultant

Finance/Financial Consultant  HR/Organization Consultant

Consultant(Other)

Preferred Industry Contains Any (OR)

Category  Software/Information Processing  IT/Telecommunications  Food Services

Hospitality, Tourism & Leisure  Human Resources  Call Center

Finance(Other)  Trading Firm

Retail/Fashion&Apparel  Retail/Distribution(Other)

Consulting  Estate  Civil Engineering / Architecture  Utilities

Governmental  Governmental Organization  Other

Expected Annual Salary -

Date Created -

Date Updated -

Expected Hourly Rate -

Current Hourly Rate -

Search

Cancel

Scroll to the bottom of the search dialog, then click the "Date Created" dropdown.

[New Saved Search](#)

[Delete Saved Search](#)

[Sort Order for Saved Searches](#)

Catherine Porters - Apps - ?

Customize View

Right © PORTERS Corporation All Rights Reserved.

## 4) Save: Set Condition - 2

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled 'Resume List Search Criteria'. A dropdown menu for 'Preferred Industry Category' is open, showing a list of options. The option 'Current Month' is highlighted in blue. A green callout box with a white border points to this option, containing the text 'From the list, select "Current Month"'. The background shows the 'Resume List' page with a search bar and various filters. The top navigation bar includes 'PORTERS', 'Client', 'Recruiter', 'Job', and 'Person'. The bottom right corner of the dialog box contains links for 'New Saved Search', 'Delete Saved Search', and 'Sort Order for Saved Searches'.

## 5) Save: New Saved Search

**Resume List Search Criteria**

Saved Search - [v]  
 Other (Creative Job)

Consulting  
 IT Systems Consultant  Strategy/Management Consultant  
 Finance/Financial Consultant  HR/Organization Consultant  
 Consultant(Other)

Preferred Industry Category: Contains Any (OR) [v]  
 Software/Information Processing  IT/Telecommunications  Food Services  
 Hospitality, Tourism & Leisure  Human Resources  Call Center  
 Medical & Healthcare  Education  
 Publishing / Printing / Advertising / Broadcasting  
 Manufacturing(Computer/Telecommunication)  
 Manufacturing(Electronics/Semiconductors)  Manufacturing(Automobile)  
 Manufacturing(Machinery)  Manufacturing(Chemicals/Materials)  
 Manufacturing(Food)  Manufacturing(Pharmaceutical/Medical Equipment)  
 Manufacturing(Other)  Finance(Banking)  Finance(Insurance)  
 Finance(Securities)  Finance(Other)  Trading Firm  
 Retail/Distribution(Fashion&Apparel)  Retail/Distribution(Other)  
 Consulting  Real Estate  Civil Engineering / Architecture  Utilities  
 Governemnt/Non-Governmental Organization  Other

Expected Annual Salary - [v]  
- [v]

Date Created: Current Month [v]

Date Updated - [v]

Search [v]  
Cancel [v]

After selecting the search conditions, click the "New Saved Search".

[New Saved Search](#)  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

✂ Delete Saved Search: Delete existing saved searches.  
✂ Sort Order for Saved Searches: Change the display sort order of saved searches.

## 6) Save: Name

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled "Resume List Search Criteria" and contains various search filters such as "Saved Search", "Preferred Industry", and "Date Created". A "New Saved Search" modal is open in the foreground, prompting the user to "Add current Search Criteria to Saved Search." and providing a text input field labeled "Name". A callout box with a green gradient background points to this input field, containing the text "Enter a meaningful custom search name." The background interface includes a navigation bar with "Client", "Recruiter", "Job", and "Person" tabs, and a sidebar with "Resume List" and "Customize View" options. The top right corner shows the user's name "Catherine Porters" and "Apps" menu.

## 7) Save: Execute Save

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled "Resume List Search Criteria" and contains various search filters such as "Designer(Fashion/Interior/Industrial)", "Consulting", "Preferred Industry", and "Category". A "New Saved Search" dialog box is open in the foreground, prompting the user to "Add current Search Criteria to Saved Search." The "Name" field in this dialog contains the text "Current Month's data recorder". A callout bubble points to the "Save" button in the dialog, with the text "Click the 'Save' button." Below the dialog, another callout bubble contains the text: "After this, the custom search condition is saved. On the next slide, we will demonstrate how to use the saved custom search."



## 8) Save: Saved Search List

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled 'Resume List' and shows a search criteria dialog box. The dialog box is titled 'Resume List Search Criteria' and contains various search filters. A callout bubble points to the 'Saved Search' dropdown menu in the upper left corner of the dialog box.

**Resume List Search Criteria**

Saved Search: -

Consulting

IT Systems Consult

Finance/Financial

Consultant(Other)

Preferred Industry Category: Contains Any (OR)

Software/Information

Hospitality, Tourism &

Medical & Healthcare  Education

Publishing / Printing / Advertising / Broadcasting

Manufacturing(Computer/Telecommunication)

Manufacturing(Electronics/Semiconductors)  Manufacturing(Automobile)

Manufacturing(Machinery)  Manufacturing(Chemicals/Materials)

Manufacturing(Food)  Manufacturing(Pharmaceutical/Medical Equipment)

Manufacturing(Other)  Finance(Banking)  Finance(Insurance)

Finance(Securities)  Finance(Other)  Trading Firm

Retail/Distribution(Fashion&Apparel)  Retail/Distribution(Other)

Consulting  Real Estate  Civil Engineering / Architecture  Utilities

Governemnt/Non-Governmental Organization  Other

Expected Annual Salary: -

Date Created: Current Month

Date Updated: -

Expected Hourly Rate: -

Current Hourly Rate: -

[New Saved Search](#)

[Delete Saved Search](#)

[Sort Order for Saved Searches](#)

From the search dialog's upper left corner, click the Saved Search dropdown.

## 9) Save: Use Saved Search

**Resume List Search Criteria**

Saved Search: - [v]

- My Pinned Resume
- All Resume
- My Resume
- Current Month's data recorder**

Preferred Industry Category: Contains Any (OR)

- Software/Information
- Hospitality, Tourism & Leisure
- Medical & Health
- Publishing / P
- Manufacturing
- Manufacturing
- Manufacturing
- Manufacturing
- Manufacturing
- Finance (Securities)
- Retail/Distribution (Fashion & Apparel)
- Consulting
- Governemnt/Non-Governmental Organization
- Education/Interior/Industrial
- Editing/Production (Jos)
- Consultant
- Strategy/Management Consultant
- Financial Consultant
- HR/Organization Consultant
- Consultant (General)
- IT/Telecommunications
- Food Services
- Human Resources
- Call Center
- Retail/Distribution (Other)
- Real Estate
- Civil Engineering / Architecture
- Utilities
- Other

Expected Annual Salary: - [v]

Date Created: Current Month [v]

Date Updated: - [v]

Expected Hourly Rate: - [v]

Current Hourly Rate: - [v]

[New Saved Search](#)  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

Search [v]  
Cancel [v]

PORTERS Trial expires in 594 days  
Client Recruiter Job Person  
Resume List  
Catherine Porters - Apps - ?  
Customize View  
Copyright © PORTERS Corporation All Rights Reserved.

## 10) Save: Search

PORTERS Trial expires in 594 days  
Client Recruiter Job Person

Resume List

Catherine Porters Apps

Customize View

Right © PORTERS Corporation All Rights Reserved.

### Resume List Search Criteria

Saved Search: Current Month's data recorder

Designer(Fashion/Interior/Industrial)  Editing/Production  
 Other(Creative Jos)

Consulting

IT Systems Consultant  Strategy/Management Consultant  
 Finance/Financial Consultant  HR/Organization Consultant  
 Consultant(Other)

Preferred Industry Category: Contains Any (OR)

Software/Informa  
 Hospitality, Touris  
 Medical & Healthc  
 Publishing / Printi  
 Manufacturing(Co  
 Manufacturing(Ele  
 Manufacturing(Machinery)  Manufacturing(Chemicals/Materials)  
 Manufacturing(Food)  Manufacturing(Pharmaceutical/Medical Equipment)  
 Manufacturing(Other)  Finance(Banking)  Finance(Insurance)  
 Finance(Securities)  Finance(Other)  Trading Firm  
 Retail/Distribution(Fashion&Apparel)  Retail/Distribution(Other)  
 Consulting  Real Estate  Civil Engineering / Architecture  Utilities  
 Governemnt/Non-Governmental Organization  Other

Expected Annual Salary: -

Date Created: Current Month

Date Updated: -

Expected Hourly Rate: -

Current Hourly Rate: -

[New Saved Search](#)  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

Search

Cancel

Either press the keyboard ENTER key or click the "Search" button to execute the search.

## 11) Save: Verify Result

PORTERS Trial expires in 594 days Catherine Porters - Apps - ?

Client Recruiter Job Person Resume Sales Process Activity

Resume List (2) Filter Add New Resume Bulk Action Customize View

Entry(1) Open(1) Close(0)

Michael green(10005) -

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

Date of Birth		Phase	Open
Address (Person)		Phase Date	2014/10/31 11:00:00
Mobile Number (Person)		Phase Memo	
E-mail (Person)	aaa@porters.ip	Photo	
Resume Owner	N/A Catherine Porters		

Sublist

Tommy February(10004) -

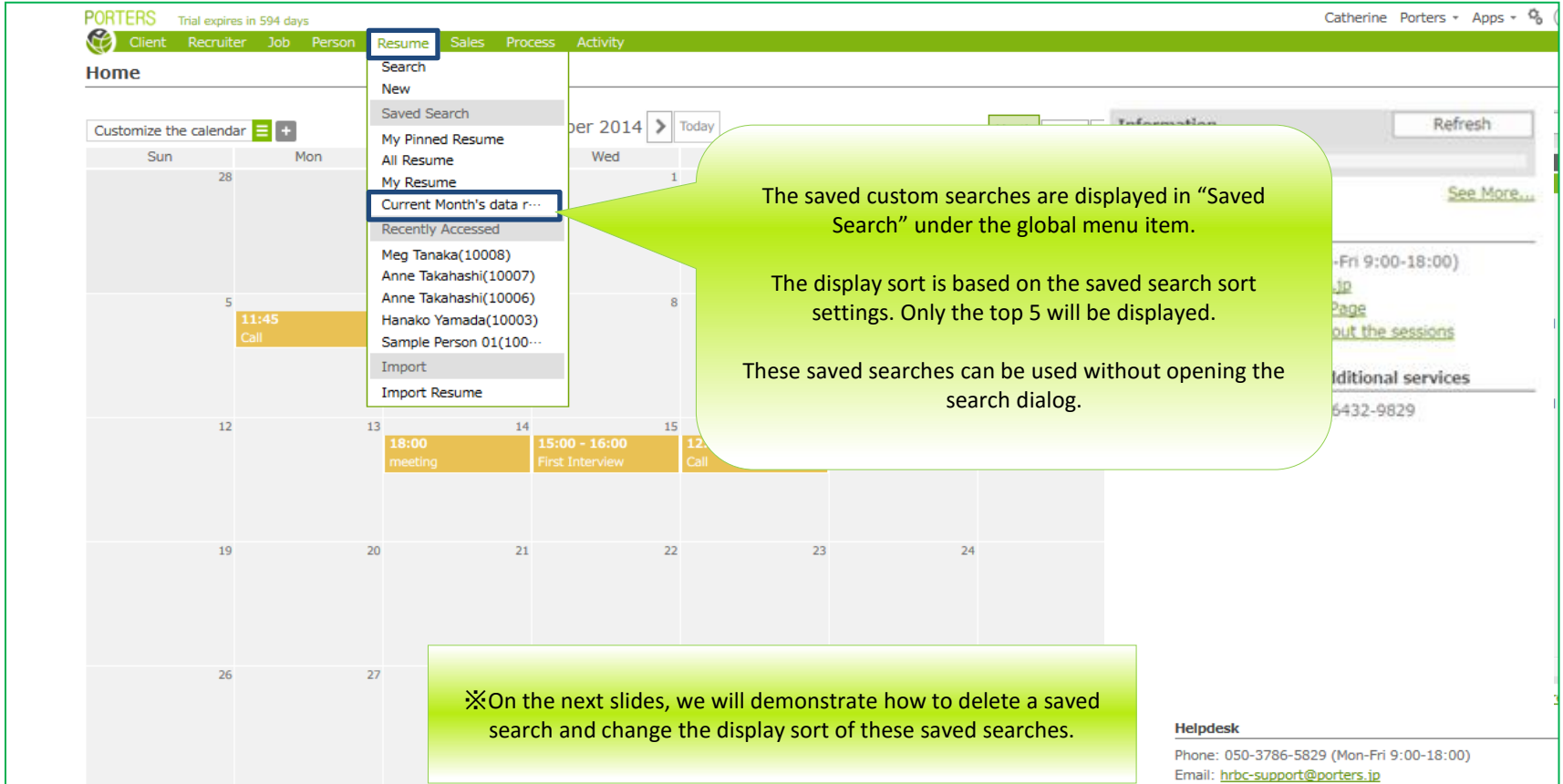
Matching > Job Sent > Recommend > 1st Interview > 2nd Interview > Decision > Offer >

Date of Birth	1991/01/01 Age 23	Phase	Entry
Address (Person)		Phase Date	2014/10/29 10:21:00
Mobile Number (Person)		Phase Memo	
E-mail (Person)	hrbc-support@porters.ip	Photo	
Resume Owner	N/A Catherine Porters		

Sublist

[Terms of Agreement](#) [About PORTERS HR-Business Cloud](#) copyright © PORTERS Corporation All Rights Reserved.

## 12) Save: Saved Search from Menu



The screenshot shows the PORTERS HR-Business Cloud interface. The top navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The 'Resume' menu is open, displaying a list of options: 'Search', 'New', 'Saved Search', 'My Pinned Resume', 'All Resume', 'My Resume', 'Current Month's data r...', 'Recently Accessed', 'Meg Tanaka(10008)', 'Anne Takahashi(10007)', 'Anne Takahashi(10006)', 'Hanako Yamada(10003)', 'Sample Person 01(100...', 'Import', and 'Import Resume'. The 'Current Month's data r...' option is highlighted with a blue box. A green callout bubble points to this option with the text: 'The saved custom searches are displayed in "Saved Search" under the global menu item. The display sort is based on the saved search sort settings. Only the top 5 will be displayed. These saved searches can be used without opening the search dialog.'

✂On the next slides, we will demonstrate how to delete a saved search and change the display sort of these saved searches.

**Helpdesk**  
Phone: 050-3786-5829 (Mon-Fri 9:00-18:00)  
Email: [hrbc-support@porters.jp](mailto:hrbc-support@porters.jp)

## 13) Delete: Select Saved Search

The screenshot displays the 'Resume List Search Criteria' dialog box in the PORTERS HR-Business Cloud application. The 'Saved Search' dropdown menu is open, showing a list of saved searches including 'All Resume', 'My Resume', and 'My Pinned Resume 2'. A green callout bubble highlights the dropdown with the instruction: 'Select the custom search that you want to delete from the Saved Search dropdown list.' The background shows the 'Resume List' page with various search filters and a 'Search' button.

PORTERS Trial expires in 594 days  
Client Recruiter Job Person  
Resume List  
Catherine Porters Apps  
Customize View  
© PORTERS Corporation All Rights Reserved.

Resume List Search Criteria

Saved Search -

All Resume  
My Resume  
My Pinned Resume  
My Pinned Resume 2

Keyword Search  
Process(End Flag) Contains Any (OR)  
Excluded  Matching  Job Search  Recommend  1st Interview  2nd Interview  
 Decision  Offer  
Pinned   
Resume ID  
Person  ID   
Resume Owner  
Registration Method Contains All (AND)  
Phase Contains Any (OR)  
Phase Date  
Photo Contains All (AND)  
Current Employment Status Contains Any (OR)  
Current Annual Salary  
Experienced Job Category Contains Any (OR)

Search  
Cancel

Select the custom search that you want to delete from the Saved Search dropdown list.

[New Saved Search](#)  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

## 14) Delete: Execute Delete Operation

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled 'Resume List' and shows a search criteria dialog box. The dialog box is titled 'Resume List Search Criteria' and contains various search filters and options. A green callout bubble with the text 'Click "Delete Saved Search".' points to the 'Delete Saved Search' link in the bottom right corner of the dialog box. The dialog box also includes a 'Search' button and a 'Cancel' button. The background shows the PORTERS logo, a trial expiration notice, and user information.

PORTERS Trial expires in 594 days  
Client Recruiter Job Person  
Resume List  
Catherine Porters Apps  
Customize View  
Copyright © PORTERS Corporation All Rights Reserved.

Resume List Search Criteria

Saved Search My Pinned Resume 2

Sort Order Updated Date(Desc)

Keyword Contains All (AND)

Keyword Search Mode  All  Attachment  Data

Process(End Flag Excluded) Contains Any (OR)  
 Matching  Job Sent  Recommend  1st Interview  2nd Interview  
 Decision  Offer

Pinned

Resume ID

Person  ID  Text  
Contains All (AND)

Resume Owner

Registration Method Contains Any (OR)  
 Method 1  Method 2  Method 3

Phase Contains Any (OR)  
 Entry  Oper

Phase Date -

Photo Contains All (AND)

Current Employment Status Contains Any (OR)  
 Employed  Between jobs  No Experience

Current Annual Salary -

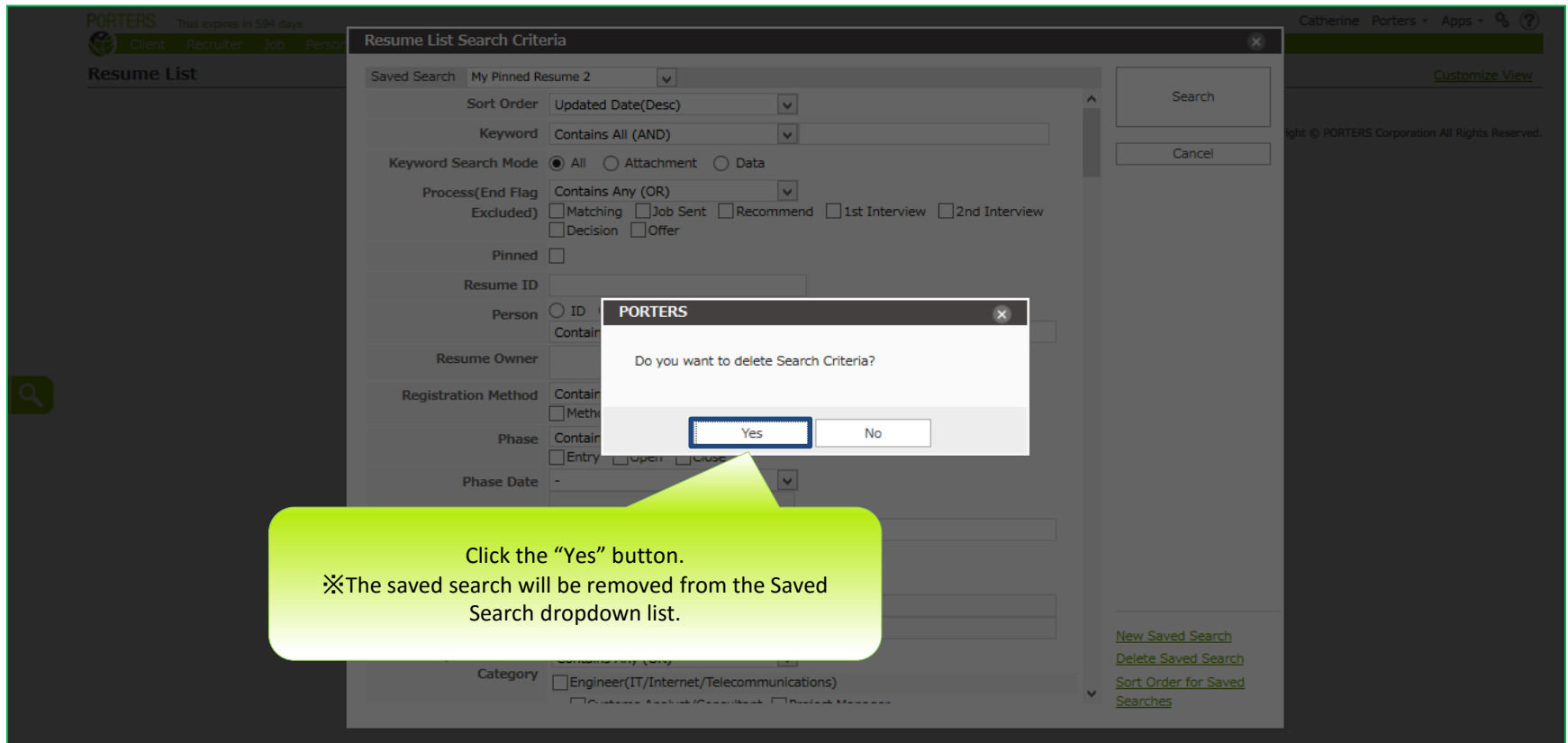
Experienced Job Category Contains Any (OR)  
 Engineer(IT/Internet/Telecommunications)

Search  
Cancel

New Saved Search  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

Click "Delete Saved Search".

## 15) Delete: Confirmation



The screenshot displays the 'Resume List Search Criteria' dialog box in the PORTERS HR-Business Cloud application. The dialog is titled 'Resume List Search Criteria' and contains various search filters such as 'Sort Order', 'Keyword', 'Keyword Search Mode', 'Process(End Flag Excluded)', 'Pinned', 'Resume ID', 'Person', 'Resume Owner', 'Registration Method', 'Phase', 'Phase Date', and 'Category'. A confirmation dialog box is overlaid on top of the search criteria dialog, with the title 'PORTERS' and the text 'Do you want to delete Search Criteria?'. The 'Yes' button is highlighted with a blue border. A green callout bubble points to the 'Yes' button with the text: 'Click the “Yes” button. ✂The saved search will be removed from the Saved Search dropdown list.'

Click the “Yes” button.  
✂The saved search will be removed from the Saved Search dropdown list.



## 16) Sort: Execute Sort Order Dialog

The screenshot displays the 'Resume List Search Criteria' dialog box within the PORTERS HR-Business Cloud application. The dialog contains various search filters such as 'Sort Order' (set to 'Updated Date(Desc)'), 'Keyword' (set to 'Contains All (AND)'), 'Keyword Search Mode' (set to 'All'), 'Process(End Flag Excluded)' (set to 'Contains Any (OR)'), 'Pinned', 'Resume ID', 'Person' (set to 'Text'), 'Resume Owner', 'Registration Method', 'Phase', 'Phase Date', 'Photo' (set to 'Contains All (AND)'), 'Current Employment Status' (set to 'Contains Any (OR)'), 'Current Annual Salary', and 'Experienced Job Category' (set to 'Contains Any (OR)').

A green callout bubble with the text "Click the 'Sort Order for Saved Searches' from the search dialog." points to a link labeled "Sort Order for Saved Searches" located in the bottom right corner of the dialog box. Other links in this area include "New Saved Search" and "Delete Saved Search".

## 17) Sort: Adjust Sort

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled 'Resume List Search Criteria' and contains various search filters such as 'Saved Search', 'Sort Order' (set to 'Updated Date(Desc)'), 'Keyword', and 'Keyword Search Mode'. A modal window titled 'Sort Order for Saved Searches' is open in the foreground, showing a list of options: 'All Resume', 'My Resume', and 'My Pinned Resume'. Below the list are 'Save' and 'Cancel' buttons. A callout bubble with a green-to-white gradient background points to the modal window and contains the text: 'Change the saved search display sort by drag & drop.'

## 18) Sort: Save

The screenshot displays the PORTERS HR-Business Cloud interface. The main window is titled 'Resume List Search Criteria' and contains various search filters such as 'Saved Search', 'Sort Order' (set to 'Updated Date(Desc)'), 'Keyword' (set to 'Contains All (AND)'), and 'Keyword Search Mode'. A modal dialog titled 'Sort Order for Saved Searches' is open in the foreground, showing a list of options: 'My Pinned Resume', 'All Resume', and 'My Resume'. The 'My Pinned Resume' option is highlighted with a blue border. Below the list are 'Save' and 'Cancel' buttons. A green callout bubble with a white background and a green border points to the 'Save' button, containing the text: 'After adjusting, click the “Save” button.'

## 19) Sort: Confirmation

The screenshot displays the PORTERS HR-Business Cloud interface. A 'Resume List Search Criteria' dialog box is open, showing search filters such as 'Sort Order: Updated Date(Desc)', 'Keyword: Contains All (AND)', and 'Experienced Job Category'. Overlaid on this is a smaller 'Sort Order for Saved Searches' dialog box with a list of options: 'My Pinned Resume', 'All Resume', and 'My Resume'. A 'PORTERS' notification box is centered on the screen, displaying the text 'Process completed.' and an 'OK' button. A yellow callout bubble points to the 'OK' button with the text 'Click the "OK" button.'.

## 20) Sort: Verify Dropdown Sort

The screenshot displays the 'Resume List Search Criteria' dialog box in the PORTERS HR-Business Cloud interface. The 'Saved Search' dropdown menu is open, showing three options: 'My Pinned Resume', 'All Resume', and 'My Resume'. A green callout box points to the dropdown with the text: 'The new sort order is reflected in the Saved Search dropdown list.'

The background shows the 'Resume List' page with various search filters and a search button. The filters include:

- Process(End Flag Excluded):  Matching  Job Sent  Decision  Offer
- Pinned:
- Resume ID:
- Person:  ID  Text
- Resume Owner:
- Registration Method:  Method 1  Method 2  Method 3
- Phase:  Entry  Open  Close
- Phase Date:
- Photo:
- Current Employment Status:  Employed  Between jobs  No Experience
- Current Annual Salary:
- Experienced Job Category:  Engineer(IT/Internet/Telecommunications)  Customer Support/Client Serv  Product Manager

Buttons: Search, Cancel

Footer: Catherine Porters - Apps - ?  
Customize View  
Copyright © PORTERS Corporation All Rights Reserved.

## 21) Sort: Verify Menu Item Sort

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 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The 'Resume' menu is open, showing a list of items: Search, New, Saved Search, My Pinned Resume, All Resume, My Resume, Recently Accessed, Michael green(10005), Hanako Yamada(10003), Sample Person 01(100..., Sample Person 02(100..., Tommy February(10004), Import, and Import Resume. A blue box highlights the 'Saved Search' item. A green callout bubble points to this item with the text: 'The sorting of saved searches under the global menu item is also based on the saved search sort. Based on this arrangement, only the top 5 custom searches are displayed.'

**Information** Refresh

2014-10-29 10:22:23

**Display order or Process entries in a Sublist**

The current specification for displaying Processes in a sublist is as follows:

- 1) The process that is most advanced is displayed at the top
- 2) The rest of the entries are sorted by the date updated in descending order (recently modified entries will be on the top)

(\*) However, processes with the "End Flag" checked are always shown below those without it checked. (The "End Flag" can be changed from the process edit screen)

We are planning on changing the specification with regards to (2). The entries will be sorted by the Process Date in descending order, as opposed to the date modified.

We will follow up with more details, once the schedule has been decided.

If you have any questions, please feel free to contact us.  
(E-mail: [hrc-support@porters.jp](mailto:hrc-support@porters.jp))

[See More...](#)

**Helpdesk**

Phone: 050-3786-5829 (Mon-Fri 9:00-18:00)