

How to Create Documents

1) Launch Create New Document dialog.

The screenshot shows the PORTERS HR-Business Cloud interface. At the top, there's 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' icon and buttons for 'Add New Job' and 'Bulk Action'. A table of job records is displayed, with 'Sample Job 03' selected. A context menu is open over this record, listing actions like Detail, Edit, Copy, Delete, Document (highlighted in red), Send Email, Email History, Resume search, and Add Activity. A callout box points to the 'Document' option with the following text:

Click the action menu of the record of which you want to create a document, then select the "Document".

On the next slides, we'll show how to create a Job Description document from Job.

Client	Sample Client 01	Phase	Close
Position	Sample Job 03	Phase Date	2014/10/31 17:00:00
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		

- ※ 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".

2.1) Available Document Template

The screenshot displays the PORTERS HR-Business Cloud interface. A modal window titled "Job - Create PDF" is open, showing options for "Document" and "Custom Document". Under the "PDF" section, there is a "Document Title, Content and Signature" area. The "Template" dropdown menu is highlighted with a red box, and a callout bubble points to it with the text "Click the Template dropdown menu to select a template." Below the "Template" dropdown are fields for "Logo Image", "Document Title", and "Document Content". At the bottom of the modal, the "Preview" button is highlighted with a red box, along with "Save" and "Cancel" buttons.

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter

Open(3) Close(0)

Sample Job 03 Matching Job Sent 2 Recon

Sublist

Sample Job 01 Matching Job Sent 1 Recon

Sublist

Sample Job 02 Matching 1 Job Sent Recon

Sublist

Job - Create PDF

Document Custom Document

PDF

Document Title, Content and Signature

Template + --

Logo Image

Document Title

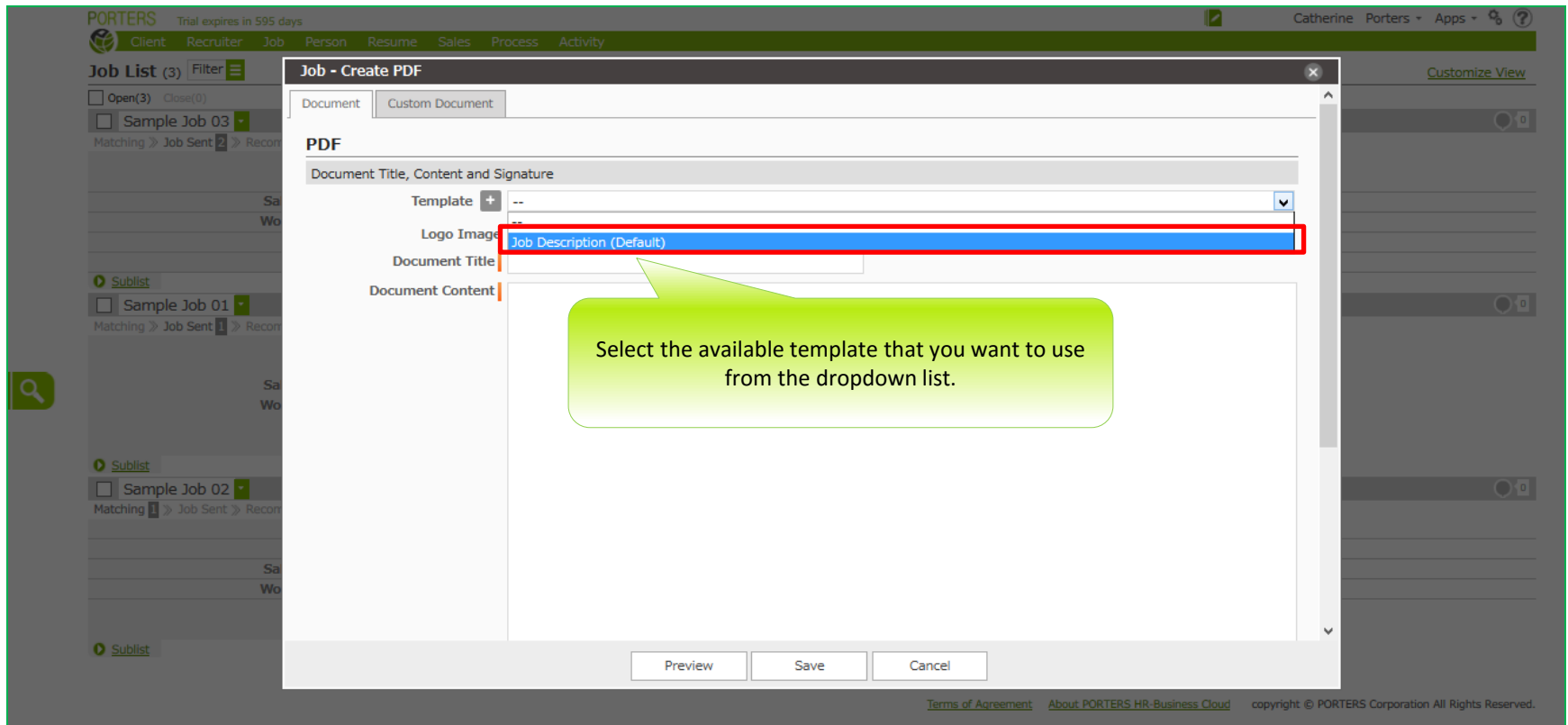
Document Content

Click the Template dropdown menu to select a template.

Preview Save Cancel

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2.2) Select Document Template



The screenshot displays the PORTERS HR-Business Cloud interface. A modal window titled "Job - Create PDF" is open, showing a "PDF" configuration section. The "Template" dropdown menu is expanded, and "Job Description (Default)" is highlighted. A callout box with a green gradient background and a white border points to the dropdown menu, containing the text: "Select the available template that you want to use from the dropdown list." The background interface shows a "Job List" with several job entries, including "Sample Job 03", "Sample Job 01", and "Sample Job 02". The top navigation bar includes "Client", "Recruiter", "Job", "Person", "Resume", "Sales", "Process", and "Activity". The user's name "Catherine Porters" and "Apps" are visible in the top right corner. The bottom of the modal window has "Preview", "Save", and "Cancel" buttons. The footer of the application contains links for "Terms of Agreement" and "About PORTERS HR-Business Cloud", along with a copyright notice: "copyright © PORTERS Corporation All Rights Reserved."

3) Apply Document Template

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter

Open(3) Close(0)

Sample Job 03 Matching Job Sent 2 Record

Sublist

Sample Job 01 Matching Job Sent 1 Record

Sublist

Sample Job 02 Matching 1 Job Sent 1 Record

Sublist

Job - Create PDF

Document Custom Document

PDF

Document Title, Content and Signature

Template + Job Description (Default) [Apply] [X]

Logo Image

Document Title Job Description

Document Content

++ Company Profile ++

- Client : Sample Client 01
- Business : Software/Information Processing,IT/Telecommunications
- Number of Employees : Sample Number of Employees

++ Position Information ++

- Position : Sample Job 03

Job Category : Custom Assistant/Consultant/Project Manager/Application Development/Engineer/Operations

Preview Save Cancel

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Click the "Apply" button to reflect the contents/settings of the template

4) Template Contents

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Client Recruiter Job Person Resume Sales Process Activity

Job List (3) Filter

Open(3) Close(0)

Sample Job 03 Matching Job Sent

Sample Job 01 Matching Job Sent

Sample Job 02 Matching Job Sent

Job - Create PDF

Document Custom Document

PDF

Document Title, Content and Signature

Template + Job Description (Default)

Apply

Logo Image

Document Title Job Description

Document Content

++ Company Profile ++

- Client : Sample Client 01
- Business : Software/Information Processing,IT/Telecommunications
- Number of Employees : Sample Number of Employees

++ Position Information ++

- Position : Sample Job 03

Preview Save Cancel

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The template title and contents can be changed.

5) Signature

Job - Create PDF

Job Category : Systems Analyst/Consultant,Project Manager,Application Development Engineer(Open Source),Application Development Engineer(Web/Mobile),Application Development Engineer(Enterprise),Application Development Engineer(Embedded Systems),Database Architect/Design Engineer,Server Architect/Design Engineer,Network Engineer (Design),Network Engineer (Operation / Maintenance),Internal Information Systems/EDP /MIS,Support (Maintenance/Operation/Training/Research & Development)Other(IT/Internet/Telecommunications) Engineer

Indus

Locat

Job C

Sample Job Summary

※Content is automatically inserted into the selected template. You can modify the content. However edited contents will not be reflected in the Template. Please use [Template Edit] to permanently modify templates.

Signature Set Signature No Signature

PORTERS Corporation
3F Toda Building Aoyama,8-5-34
Akasaka,Minato-ku,Tokyo 107-0052 Japan
Tel.181-3-XXXX-XXXX

※Signature is automatically inserted from signature template. You can edit it. signature contents are overwrite with latest contents. Please set the contents of the receiver.

Preview Save Cancel

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6) Preview



Job Description

++ Company Profile ++

■ Client : Sample Client 01

■ Business : Software/Information

■ Number of Employees : Sample Number of

++ Position Information ++

■ Position : Sample Job 03

■ Job Category : Systems Analyst/Consultant,Project manager,Application Development Engineer(Open Source),Application Development Engineer(Web/Mobile),Application Development Engineer(Enterprise),Application Development Engineer(Embedded Systems),Database Architect/Design Engineer,Server Architect/Design Engineer,Network Engineer (Design),Network Engineer (Operation / Maintenance),Internal Information Systems/EDP/MIS,Support/Maintenance/Operation/Training,Research & Development,Other(IT/Internet/Telecommunications) Engineer

■ Industry Category : Software/Information Processing,IT/Telecommunications

■ Location : Tōkyō

The PDF preview will be opened in a different window.
Since the document is now a printable format, you can print the document.

7) Save

The screenshot shows the PORTERS HR-Business Cloud interface. A 'Job - Create PDF' dialog box is open, displaying the following information:

- Job Category**: Systems Analyst/Consultant, Project Manager, Application Development Engineer (Open Source), Application Development Engineer (Web/Mobile), Application Development Engineer (Enterprise), Application Development Engineer (Embedded Systems), Database Architect/Design Engineer, Server Architect/Design Engineer, Network Engineer (Design), Network Engineer (Operation / Maintenance), Internal Information Systems/EDP /MIS, Support/Maintenance/Operation/Training, Research & Development, Other (IT/Internet/Telecommunications) Engineer
- Industry Category**: Software/Information Processing, IT/Telecommunications
- Location**: Tōkyō
- Job Category Summary**: Sample Job Summary

Below the job details, there is a signature section with the following text:

Signature Set Signature
+++++
PORTERS Corporation
3F Toda Building Aoyama, 8
Akasaka, Minato-ku, Tokyo 1
Tel: 03-XXXX-XXXX

At the bottom of the dialog, there are three buttons: 'Preview', 'Save', and 'Cancel'. The 'Save' button is highlighted with a red box. A green callout bubble points to the 'Save' button with the text: 'If there are no problems with the document, you can now finalize it by clicking the Save button.'

At the bottom of the interface, there is a footer with the following text: 'Terms of Agreement About PORTERS HR-Business Cloud copyright © PORTERS Corporation All Rights Reserved.'

8) Save Notification

The screenshot displays the PORTERS HR-Business Cloud interface. A 'Job - Create PDF' dialog box is open, showing job details such as Job Category, Industry Category, and Location. A smaller 'PORTERS' notification window is overlaid on the dialog, displaying the message 'Job is saved in attachment.' and an 'OK' button. A yellow callout bubble points to the 'OK' button with the text 'Click the "OK" button.' The background interface shows a 'Job List' with entries like 'Sample Job 03', 'Sample Job 01', and 'Sample Job 02'. The top navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. The bottom of the screen contains a footer with 'Terms of Agreement', 'About PORTERS HR-Business Cloud', and 'copyright © PORTERS Corporation All Rights Reserved.'

9) Cancel

The screenshot displays the PORTERS HR-Business Cloud interface. A 'Job - Create PDF' dialog box is open, showing the following details:

- Job Category**: Systems Analyst/Consultant, Project Manager, Application Development Engineer (Open Source), Application Development Engineer (Web/Mobile), Application Development Engineer (Enterprise), Application Development Engineer (Embedded Systems), Database Architect/Design Engineer, Server Architect/Design Engineer, Network Engineer (Design), Network Engineer (Operation / Maintenance), Internal Information Systems/EDP /MIS, Support/Maintenance/Operation/Training, Research & Development, Other (IT/Internet/Telecommunications) Engineer
- Industry Category**: Software/Information Processing, IT/Telecommunications
- Location**: Tōkyō
- Job Category Summary**: Sample Job Summary

Below these fields, there are two red warning messages:

- ※Content is automatically populated into the selected template. You can modify the content However edited content will not be reflected in the template. (modify templates).
- ※Signature is automatically inserted from signature template. You can edit it but please take care while sending an email as signature contents are overwrite with latest contents. Please set the content of the signature template for temporary edit or signature as per email receiver.

The 'Signature' field is set to 'Set Signature' and contains the following text:

PORTERS Corporation
3F Toda Building Aoyama, 8-5-1
Akasaka, Minato-ku, Tokyo 107-8565
Tel: 03-6369-0000

A callout bubble points to the 'Cancel' button, stating: "Once the document is saved, please click the 'Cancel' button to close the dialog." The 'Cancel' button is highlighted with a red box.

At the bottom of the dialog, there are three buttons: 'Preview', 'Save', and 'Cancel'.

Footer text: Terms of Agreement About PORTERS HR-Business Cloud copyright © PORTERS Corporation All Rights Reserved.

10) Document List

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Client Recruiter Job Person Resume Process Sales Activity

Job List (8) Filter Add New Job Bulk Action

Open(0) Close(3)

Sample Job 03

Client Sample Client 01
Position Sample Job 03

Sample Job 04

Client Sample Client 01
Position Sample Job 04
Salary Details Sample Salary Details
Work Location Tōkyō
Permission Publish (Real Name)
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

Job | Sample Job 03 (10003)

Print View

The document is saved as an attachment in the "Sublist Attachment".
Using the action menu associated with the document, you can either download it or delete it.

- ✘ In case the "Attachment" Sublist is disabled, please add it using the "Sublist" item in the Customize screen. (Systems Administrators only)
- ✘ In case if the document list is not up to date, click the refresh button.

Sublist | Attachment Add New

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 17:00:00	Close	We finished recruitment of employees.	N/A Stacie	2015/07/23 20:39:09

Mail Search