

How to Use the Calendar Feature

(Scheduling, Meeting Room Reservations, Notifications)

PORTERS Trial expires in 595 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Sales Process Activity

Home

Customize the calendar < October 2014 > Today Month Week Day

Information Refresh

See More...

18:00)

essions

services

9

By utilizing the calendar functions, you can manage things such as users' schedules and meeting room reservations.

[Regarding registration]
From the calendar screen, activities and resources can be registered, edited, or deleted.
Process can be registered from the following resources:
Client, Recruiter, Job, Person, Resume, Process

Display Color Classifications (the following three colors only):
Blue: Tied to job or resume, or schedule for matching or interview (Process)
Orange: Internal meetings and interviews, etc. Schedule unrelated to Process. (Activity)
Grey: Meeting room and projector, etc. usage situation (Resource)

- ※ 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".

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the logo and navigation menu are visible. The main area shows a calendar for October 2014. A customization panel is open on the left, titled "Customize the calendar". This panel has four sections: "Set the users to show:", "Set the events to show:", "Set the resources to show:", and "Set the events to show:". The "Set the users to show:" section includes a checked "Show my events" option and a search box containing "AAA All the users". The "Set the events to show:" section includes a checked "Show the Activity" option and a search box containing "Phase (Selection Process) 1st Interview" and "Phase (Selection Process) Offer". The "Set the resources to show:" section includes a search box containing "Equipment All". The "Set the events to show:" section also includes a "Show only current phase" checkbox. The calendar shows several events, including "Open - Sample Person 01(10001)" on October 8th, "Call" on October 16th, and "Open - Hanako Yamada(10003)" on October 27th. A pink callout box on the right contains text explaining the customization options.

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Client Recruiter Job Person Resume Sales Process Activity

Home

Customize the calendar October 2014 Today

Set the users to show:

Show my events

Show other users events

AAA All the users

Set the events to show:

Show the Activity

Show the following phases/Process Show only current phase

Phase (Selection Process) 1st Interview

Phase (Selection Process) Offer

Set the resources to show:

Show this resources

Equipment All

Ok Cancel

10:00 Open - Sample Person 01(10001)

12:00 Call

Open - Hanako Yamada(10003)

[Regarding display contents]

The contents displayed in the calendar can be altered by clicking "Customize the calendar"

You can set the calendar to display desired information such as the process from the interview step only, and not show recommendations or document process, etc., by the setting of "Set the events to show" on the left side.

By checking the "Show only current phase", only the latest phase will be shown in the calendar.

[Regarding resource]

By changing the "Set resource to show", you can manage the use of resources such as conference rooms and interview space.

Resources can be freely edited in the "Option Schema" panel in the Customization screen.

*This menu item is displayed by default if you began using HRBC after 3 September 2013. In the event that HRBC use began prior to that date, please change the setting of "Resource" in the Activity detail view panel in the Customization screen.

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Client Recruiter Job Person Resume Sales Process Activity

Home

Customize the calendar < October 2014 > Today Month Week Day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6 11:45 Call	7	8	9 10:00 Open - Hanako Yamada(10003)	10	11
12	13	14	15 15:00 - 16:00 First Interview 15:00 - 16:00 Meeting Room A - First Interview	16 12:00 Call	17	18
19	20	21 18:36 Open - Hanako Yamada(10003)	22	23	24	25
26	27	28	29	30	31	1

Example: Here, the candidate's initial interview is registered

Information Refresh

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Client Recruiter Job Person Resume Sales Process Activity

Home

Customize the calendar

< October 201

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Day
28	29	30				4	
5	6 11:45 Call	7	8 Sample 01(10001)	9	10	11	
12	13	14 15:15 Open - Sample Person 02(10002) 18:00 meeting 18:00 Meeting Room A - meeting	15	16 12:00 Call	17	18	
19	20	21 18:36 Open - Hanako Yamada(10003)	22	23	24	25	
26	27	28	29 10:21	30 16:46	31	1	

Information

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Click the day in which you wish to register a new schedule event.

Activity- New

Members

Resource Client Job Resume None

Resource ID 🔍 +

Activity Information

Activity ID

Activity Owner | N/A Catherine Porters ✎

From | 2014/10/15 00:00 🕒

To | 2014/10/15 00:00 🕒

Title |

Memo

Activity Participants | N/A Catherine Porters ✕ 🔍

Equipment Meeting Room A Meeting Room B Projector A

System Information

Date Created	Date Updated
Registered by	Updated by

[Send notification email](#) 📧

Save Cancel

The New Activity dialog box will open.
In order to connect the activity to a job candidate, select "Resume"

Activity- New

Members

Resource Client Job Resume None

Resource ID x 🔍 +

Tommy February(10004) Tommy February

Add new

Activity Information

Activity ID

Activity Owner | N/A Catherine Porters ✎

From | 2014/10/15 00:00 ⌚

To | 2014/10/15 00:00 ⌚

Equipment Meeting Room A Meeting Room B Projector A

System Information

Date Created	Date Updated
Registered by	Updated by

[Send notification email](#) 📧

Save Cancel

Callout 1 (Pink): When you wish to select an unregistered person, you can click the plus button on the right side of the entry field or select "Add New" from the bottom of the pull-down list to register a new person.

Callout 2 (Green): The activity registration name entry form will open, and by typing a part of the candidate's name, you can select a previously registered person from the pull-down list.

Activity- New

required | web | document

Members

Resource Client Job Resume None

Resource ID Tommy February(10004) ✎

Activity Information

Activity ID

Activity Owner N/A Catherine Porters ✎

From 2014/10/15 00:00 ⌚

To 2014/10/15 00:00 ⌚

Title

Memo

Activity Participants N/A Catherine Porters ✎ 🔍

Equipment Meeting Room A Meeting Room B Projector A

System Information

Date Created Date Updated

Registered by Updated by

[Send notification email](#) 📧

Save Cancel

Select the date and time.

By clicking the date entry field, a calendar will be displayed.
By clicking the time field, a pull-down menu will be displayed.
By clicking the clock icon, the current time will be entered.

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Client Recruiter Job Person

Home

Customize the calendar

Sun 28 Mon 29

5 6

11:45 Call

12 13

19 20

26 27

Activity- New

required web document

Members

Resource Client Job Resume None

Resource ID Tommy February(10004)

Activity Information

Activity ID

Activity Owner N/A Catherine Porters

From 2014/10/15 15:00

To 2014/10/15 16:00

Title First Interview

Memo

Activity Participants N/A Catherine Porters

Equipment Meeting Room A Meeting Room B Projector A

System Information

Date Created Date Updated

Registered by Updated by

[Send notification email](#)

Save Cancel

The contents of the subject line will be displayed in the relevant date in the calendar, so be sure to make it easy to understand.

Fill in the memo field if necessary.

Activity- New

Members
Resource: Client Job Resume None
Resource ID: Tommy February(10004)

Activity Information
Activity ID:
Activity Owner: N/A Catherine Porters
From: 2014/10/15 15:00
To: 2014/10/15 16:00
Title: First Interview
Memo:

Activity Participants
N/A Catherine Porters
Equipment: Meeting Room A Meet

System Information
Date Created
Registered by

Search Results:
N/A All the users
N/A Catherine Porters
N/A Nancy
N/A Stacie

Callout: Select participants as required. By entering part of a participant's name, a list of potential names will be displayed. After selecting participants, you can remove them by clicking the X button to the right of their name.

Send notification email

Save Cancel

Activity- New

Members

Resource: Client Job Resume None

Resource ID: Tommy February(10004)

Activity Information

Activity ID: []

Activity Owner: N/A Catherine Porters

From: 2014/10/15 15:00

To: 2014/10/15 16:00

Title: First Interview

Memo: []

Activity Participants: N/A Catherine Porters

Equipment: Meeting Room A Meeting Room B Projector A

System Information

Date Created: [] Date Updated: [] Updated by: []

[Send notification email](#)

Save Cancel

Callout 1: Select the resource as required.

Callout 2: To send a reminder to the relevant personnel, click the "Send notification email" button.

Activity- New

Members

Resource Client Job Resume None

Resource ID Tommy February(10004)

Activity Information

Activity ID

Activity Owner N/A Catherine Porters

From 2014/10/15 15:00

To 2014/10/15 16:00

Title First Interview

Memo

Activity Participants N/A Catherine Porters

System I

Resource owner(s) Me Activity Participants

Additional comment

Send notification email

Save Cancel

Select the recipients you wish to send a reminder to. Enter any comments if necessary.

When you are finished entering the information, click "Save".

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12	13	14 15:15 Open - Sample Person 02(10002) 18:00 meeting 18:00 Meeting Room A - meeting	15 15:00 - 16:00 First Interview 15:00 - 16:00 Meeting Room A - First Interview	16 12:00 Call	17	18
19	20 18:36 Open - Hanako Yamada(10003)	21	22	23	24	25
26	27	28	29	30	31	1

10:21 00:00 13:58

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The schedule is reflected in the calendar.

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28	29	30	1	2	3	4
5	6 11:45 Call	7	8 10:00 Open 01	9	10	11
12	13	14	15 15:15 15:00 - 16:00 12:00	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

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By clicking the schedule, the details can be checked.

By clicking "Edit", the contents can be updated.

First Interview
2014/10/15 15:00 - 16:00

Resume [Tommy February\(10004\)](#)

Activity Participants N/A Catherine Porters, N/A Nancy, N/A Stacie

Equipment Meeting Room A

Memo

Edit Delete Cancel