

Beyond - How to Create an Employee Record

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Creating Employee Records in Beyond™

Employee records in Beyond allow you to keep track of the relationship history your team has with an employee as well as keep track of documents and information that will be helpful for placing them on a job.

There are 4 ways to create an employee record in Beyond:

1. [Employee From Resume](#) - create an employee based on a resume uploaded
2. [Manual Entry](#) - entering employee information manually in Beyond
3. [HRCenter™](#) - utilizing our online onboarding and application tool to have employees fill out required information
4. [Outlook™ Add-in](#) - entering employee information including parsing a resume straight from your Outlook email

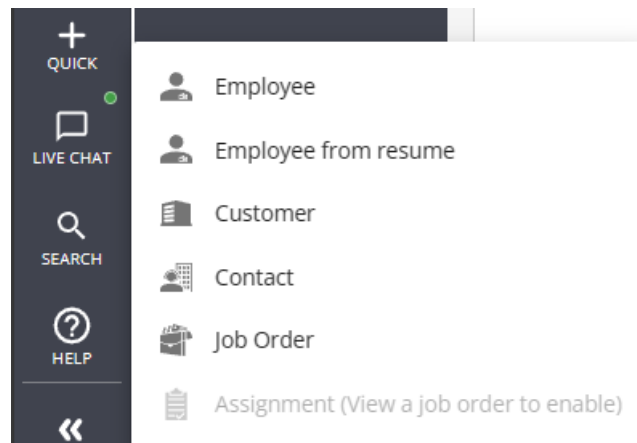
Trainer Tip: It is recommended that you first search to see if there is already an existing record for the employee before entering them to avoid creating duplicate records.

This article will cover the Manual Entry option. For more information on the other options for entering employees, *click on the links above.*

Employee From Resume

This option allows you to upload a resume from a new employee and have the system create an employee record based on the information provided. This works great for recruiters who receive a lot of resumes. At this time, Beyond will only allow you to upload one resume at a time and it does not check for duplicate employees in the system so make sure to search for the person first to check if they are already in the system.

1. From the Beyond home screen, select the "Quick +" button in the left and choose add employee from resume:



2. Drag and drop or tap to select a file from your device:

Create Employee from Resume

Submitting this form will immediately create an employee from the parsed resume.



Drop file here
or click to select a file.

*Required

SAVE AS DRAFT

CANCEL

SUBMIT

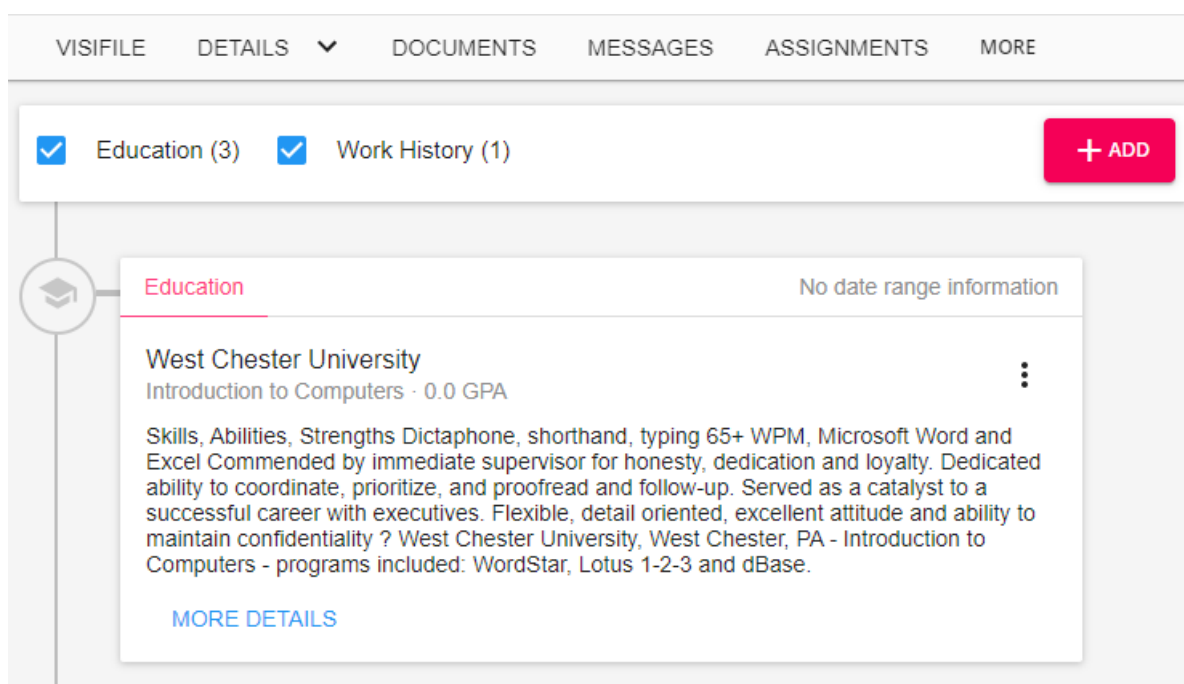
3. Select Submit and you will be brought to the newly created employee record.

The **resume** will be attached to the record under documents tab or on the Resume Card in Beyond.



Address and contact information will be found on the details tab

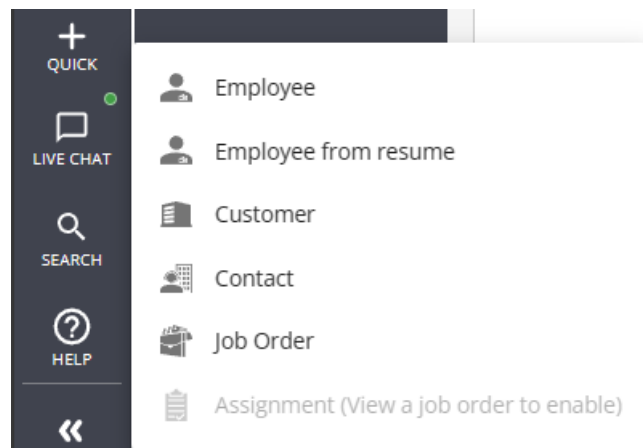
Work history and Education that the system finds will be parsed into the Story tab of the employee record. We recommend that you review this section and make sure to update/add anything that the computer missed.



Manual Entry

Manual entry can occur when an employee record needs to be added into your system by your service rep. With this method, the service rep will be responsible for gathering all important information pertinent to the employee record.

From the Beyond home screen, select the "Quick +" button in the left to add an employee record:



Once selected, this will open the 'Add new employee' wizard. Enter the employee's first and last name, select the branch the employee is tied to, address details, and contact information. Fields that are required are marked with an asterisk and must be filled out in order to save the record.

Note You can only enter the following characters within the "First Name" and "Last Name" fields:

- ABCDEFGHIJKLMNOPQRSTUVWXYZ
- 0123456789
- . (Period)
- - (Hyphen)
- ' (Apostrophe)

Add New Employee

* First Name

Albus

* Last Name

Dumbledore

SSN

763-48-7654

How Heard Of

Client Referral



* Branch

High Tech NE



Home Address

Street

123 Hogwarts Lane

Street 2

City

Minneapolis

* State

Minnesota



Zip Code

55123

* Country

United States of America



Contact Information

* Phone Format

U.S. +1

Phone Number

(456) 789-4560

Email Address

SAVE AS DRAFT

CANCEL [SUBMIT](#)

Note In the event you have entered a last name and last 4 of SSN that match an employee record that exists in your system, the "Submit" option will turn into a "Next" option, navigating you to an additional screen for duplicate record checking:

Add New Employee - Employee Creation

1 Employee Creation

2 Duplicate Check

3 Address Standardization

* First Name John	* Last Name Alaska
SSN [REDACTED] 7411	How Heard Of ▼
* Branch High Tech SE ▼	
Home Address	
Street 123 Main Street	Street 2
City Eagan	* State Minnesota ▼
Zip Code 55121	* Country United States of America ▼
Contact Information	
* Phone Format U.S. +1 ▼	Phone Number (555) 555-5555
Email Address testemail@gmail.com	

CANCELNEXT >

Within the "Duplicate Check" screen, you will have the option to continue with the creation of the new employee record, or abandon the new creation and edit an already existing record with similar found information:

Add New Employee - Duplicate Check

1 Employee Creation — 2 Duplicate Check — 3 Address Standardization

2 employees are potential duplicates of the new employee, based on the last name and last 4 digits of SSN. Choose to create the new employee or update a matching employee.

New Employee

John Alaska
(555) 555-5555
testemail@gmail.com
SSN: [REDACTED] 7411

CONTINUE WITH NEW RECORD
CREATION

Matching Records

[Baked Alaska](#)
[4296220628](#)
(612) 555-0155
first.last@gmail.com
SSN: 000-00-7411

ABANDON AND EDIT EXISTING RECORD

[Joe Alaska](#)
[5027](#)
(651) 236-8236 ext. 123
imapdummyaccount@gmail.com
SSN: 000-00-7411

ABANDON AND EDIT EXISTING RECORD

CANCEL < PREVIOUS

Configuration Alert

If you have Address Standardization enabled for the employee record permanent address, there will be a second step to verify the address with the USPS. To learn more about address standardization, see [Beyond - Address Standardization](#).

You will be taken directly to the Visifile of the newly created employee record. You are now ready to interact with your employee's record by adding information into its various cards, tabs, and by logging messages:

VISIFILEDETAILS▼DOCUMENTSMESSAGESASSIGNMENTSSTORYMORE

^ Snapshot

Id

4295081737

Hire Status

Eligible and Active >

Job Title

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^ Note

No note available

^ Contact Information

(456) 789-4560

Phone

^ Messages

No messages

^ Resume

No resume to view

^ Assignments

No assignments

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