Beyond - How to Create an Employee Record

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.*
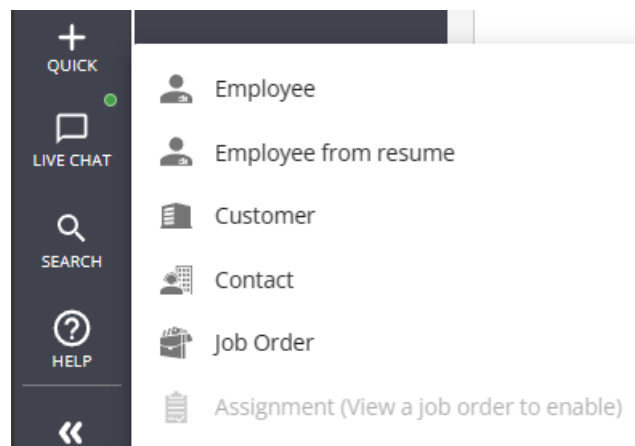
Employee From Resume

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.

> *Note* Duplicate checking is not available when utilizing the "Quick Add - Employee from Resume" functionality.
>
> To ensure the system is checking for duplicate records when uploading resumes, you can utilize the Bulk Resume Upload functionality that is outlined within the article titled Beyond - How to Upload Resumes in Bulk. This also allows you to upload resumes individually.

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:
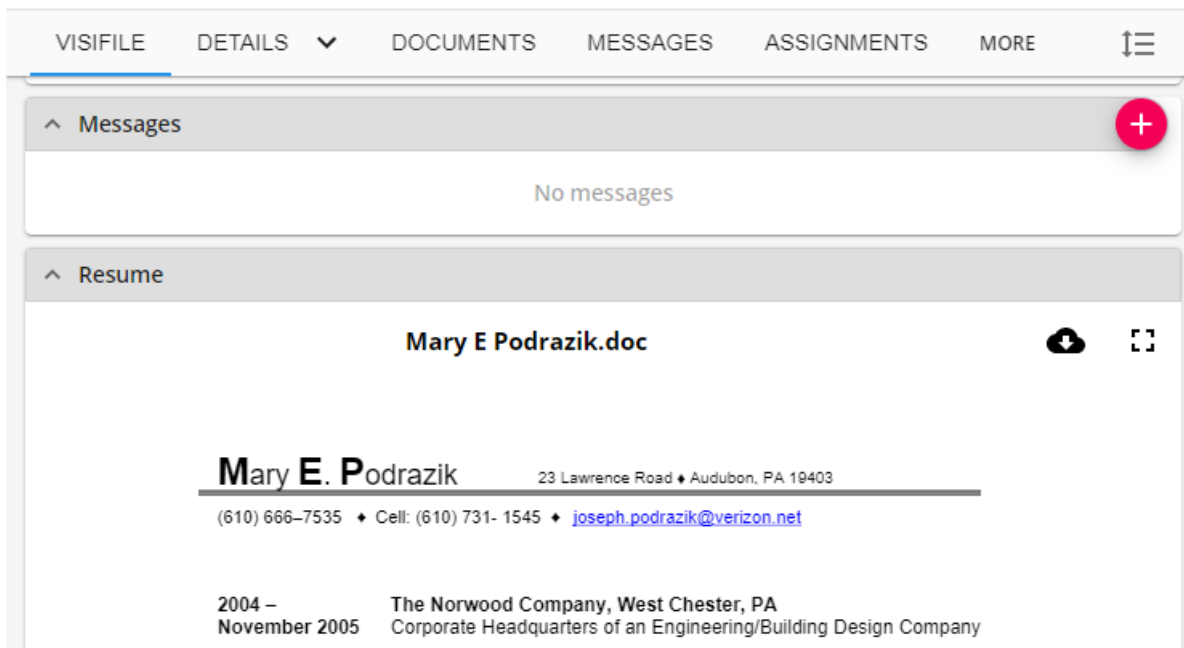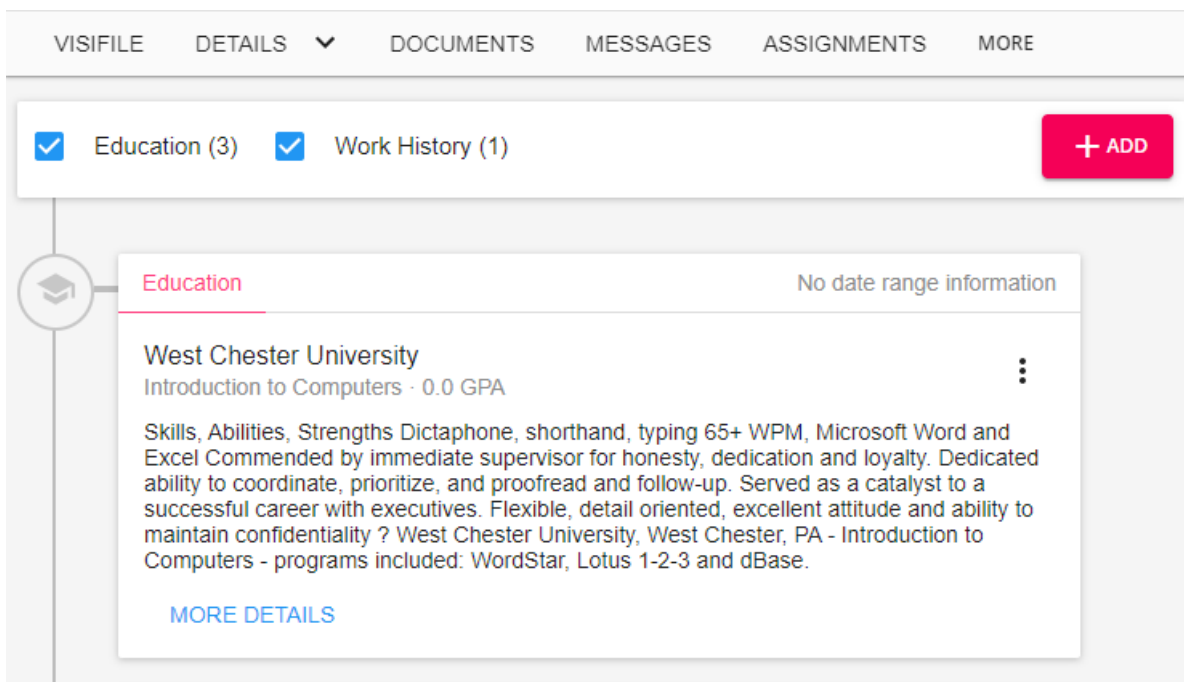

3. Select Submit and you will be brought to the newly created employee record.

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

∧ Messages ⊕

No messages

∧ Resume

Mary E Podrazik.doc ☁ ⛶

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| 2004 – November 2005 | The Norwood Company, West Chester, PA Corporate Headquarters of an Engineering/Building Design Company |

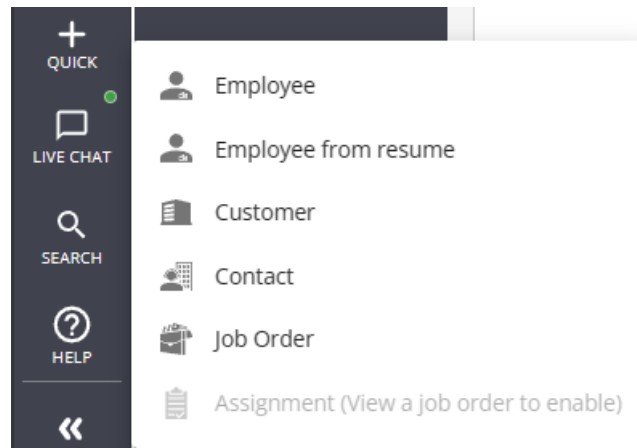**Address** and **contact information** will be found on the details tab

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.

VISIFILE   DETAILS ∨   DOCUMENTS   MESSAGES   ASSIGNMENTS   MORE

☑ Education (3)   ☑ Work History (1)   **+ ADD**

🎓 | Education | No date range information

West Chester University
Introduction to Computers · 0.0 GPA   ⋮

Skills, Abilities, Strengths Dictaphone, shorthand, typing 65+ WPM, Microsoft Word and Excel Commended by immediate supervisor for honesty, dedication and loyalty. Dedicated ability to coordinate, prioritize, and proofread and follow-up. Served as a catalyst to a successful career with executives. Flexible, detail oriented, excellent attitude and ability to maintain confidentiality ? West Chester University, West Chester, PA - Introduction to Computers - programs included: WordStar, Lotus 1-2-3 and dBase.

MORE DETAILS

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
████ 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

CANCEL   NEXT >

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

✓ 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   ‖   ### Matching Records

John Alaska
(555) 555-5555
testemail@gmail.com
SSN: ███7411

[CONTINUE WITH NEW RECORD CREATION]

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:

⌃ Snapshot

Id	4295081737	Hire Status	Eligible and Active ›
Job Title	--		

⌃ Note

No note available

⌃ Contact Information

(456) 789-4560
Phone

⌃ Messages

No messages

⌃ Resume

No resume to view

⌃ Assignments

No assignments

Related Articles