Beyond - How to Deactivate and Reactivate Employee Records

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Deactivating vs Deleting

For data integrity purposes, Beyond does not allow you to truly "delete" employee records from the system. Instead, you are able to deactivate employee records. Deactivating a record will ensure that it does not show up in your every day searches and reports.

Note The user must have permission to log a message with the deactivate or reactive message action codes in order to log these messages. Beyond permissions are managed in Security Groups. To learn more, check out Message Action Security Groups.

How to Deactivate Employee Records

Begin by navigating to the visifile of the employee record you wish to deactivate. The "Status" charm in the charms section of the employee record indicates whether the record is active or inactive. **If the "Status" charm is green, the record is** *active.*

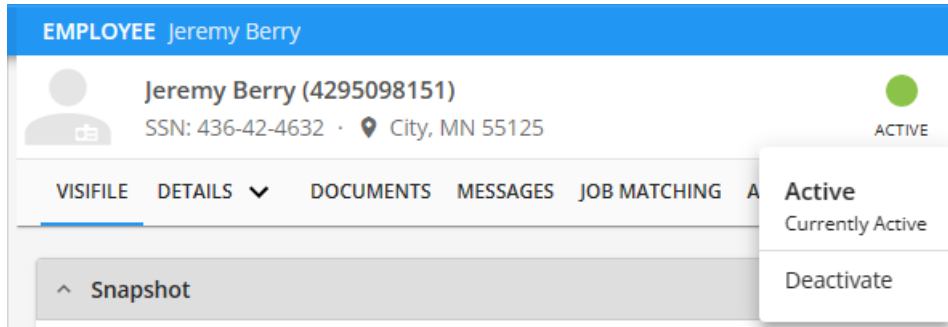Select the "Status" ACTIVE charm and then select "Deactivate":

Once selected, a "Deactivate" message will automatically be logged on the employee profile, and their Status will be updated to "Inactive":
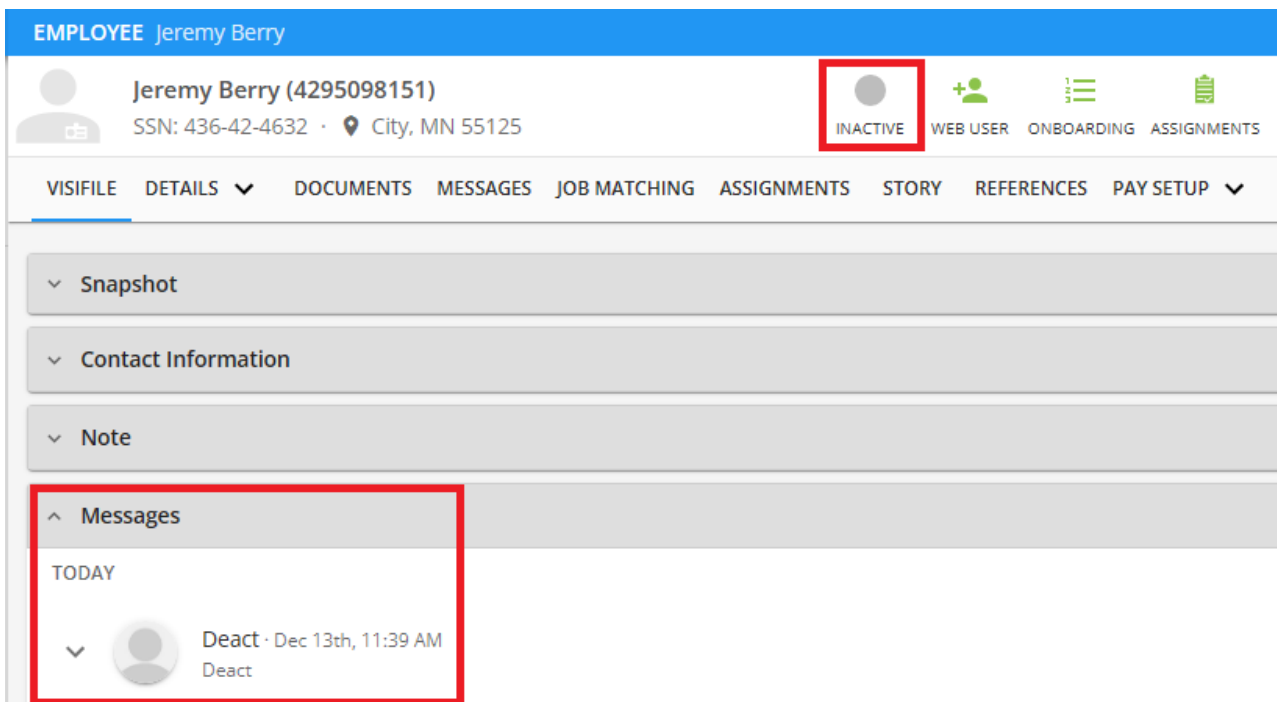
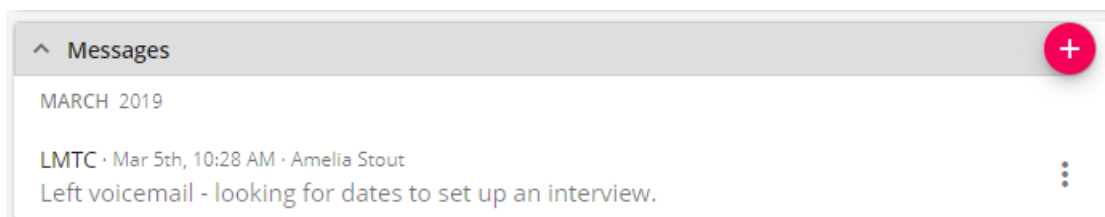Alternatively, in the 'Messages' card on the visifile, select the ➕ button to open the "Compose Message" wizard:

Enter the reason for the deactivation under the message section and select the "Deactivate" action code.

Compose Message

Message
Moved away to Ireland

_____

Action
Deactivate   ▼

☐   Create a task

SAVE AS DRAFT   CANCEL   SUBMIT

Note Message action codes are customizable so you may have a different action code you need to select in order to deactivate. Talk with your system admin if you are unsure which action code to use.

Deactivating Employees from Search Results

Employees are able to be deactivated, en masse, from the Employee search results.

Begin by navigating to an Employee search within Beyond, searching for the employees that you would like to Deactivate, ensuring the Status is currently set to "Active" within the search:

Search / Employees											
BASIC						ADVANCED					
Last Name		First Name		Employee Id				Government Id			
Al		First									
Assigned		Status		Branch				Service Representative			
Either		Active		All				All			
									RESET	SEARCH	
Search returned 91 results											⬇
☐	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
☐	5026	Alabama	Morgan	Memphis NE	✓		React	35893	✓	(651) 235-8235x123	
☐	4295037184	Alaska	Ally	Minneapolis	✓	✓	Placed	55123		6514520366	651452036
☐	16438	Alaska	Joe	Minneapolis	✓		Offered	45056	✓	6125550919	612555123
☐	5027	Alaska	Joe	Minneapolis	✓	✓	Customer Interview	9950		(651) 236-8236x123	
☐	4294973045	Alaska	Joe	Minneapolis	✓	✓	ACA Exchange Notific...	19131	✓	(215) 878-7877	
☐	4295027073	Albers	Pete	Minneapolis	✓	✓	ACA Exchange Notific...	55123			
☐	4295059137	Albertson	Ted	New Brighton	✓	✓	Order Candidate	55402			846156145

Highlight the group of Employees that are to be Deactivated:

Either Right-Click or select the dropdown menu next to the "# selected employees", select the "Log Message for # Recipients" and select the option for "Deactivate":

Note Employees that are currently Assigned are unable to be Deactivated. In the event this is attempted, you will be prompted with a message stating how the Employee records were not Deactivated and the reason why:

Message Action Error

No messages were logged for the following records.

^ DETAILS

The following 2 out of 5 failed the process:

Zoe Alvarez 4295083028 (You can not deactivate an employee who is still on assignment.)

Jodi Ambers 11860 (You can not deactivate an employee who is still on assignment.)

CLOSE
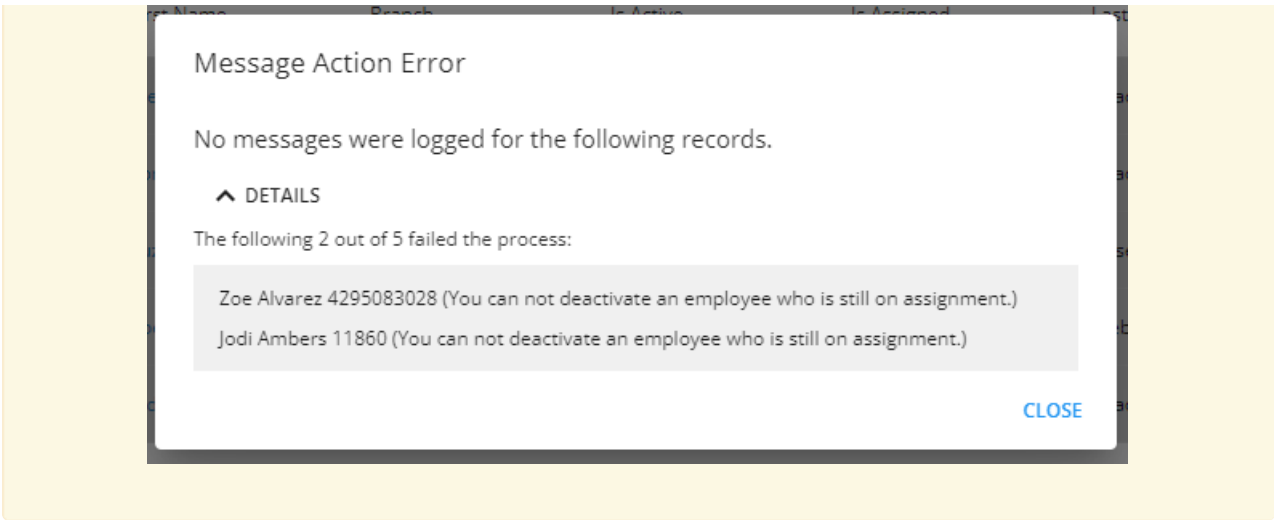
Once the Deactivation is complete, a message will appear at the bottom of the screen indicating the amount of records that have been successfully Deactivated:

Search returned 7607 results

3 selected employees ⌄   Clear Selection

	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message
☑	4294971762	Altstatt	Megan	Memphis NE	✓		React
☑	4294972294	Alvarado	Lorenzo	Minneapolis	✓		React
☑	4295093620	Alvaran	Luz	New Brighton	✓		Absent (excused)
☐	4295083028	Alvarez	Zoe	Eagan	✓	✓	WebMessage
☐	11860	Ambers	Jodi	Memphis NE	✓	✓	React
☐	4295048935	Ameliabedelia	Ameliabedelia	Minneapolis	✓		React
☐	4295081730	Amendt	Kate	Minneapolis	✓	✓	Refused
☐	4295083424	America	John	Minneapolis	✓		
☐	4295079870	America	John	New Brighton	✓	✓	Order Candidate
☐	4295083583	amia	mam	Minneapolis	✓		Placed
☐	4295014363	Amons	Tori	Memphis NE	✓	✓	React
☐	17309	Amoss	Royal	Memphis NE	✓		React
☐	4295081282	Anaya	Ailen				Placed

3 Deact messages logged

Note The Employee Search results will need to be reloaded for the employees to be removed from the list.

What Happens When a Deactivation Message is Submitted?

The activation charm status will change to *inactive and grey.*

The 'Deactivation Date' field will be populated in the hiring card of the employee records 'DETAILS' tab:


The employee will be listed as *inactive* in search results.

Note You may not assign an inactive employee. When attempting to assign an inactive employee to an order, a hard stop assignment restriction will prevent you from completing the process. Before you are able to proceed with creating the assignment record, you will need to reactivate the employee record.

How to Reactivate an Employee Record

To reactivate an employee record simply follow the same steps taken to deactivate the record.

Begin by navigating to the visifile of the employee record you wish to deactivate.

Select the "Status" INACTIVE charm and then select "Reactivate":
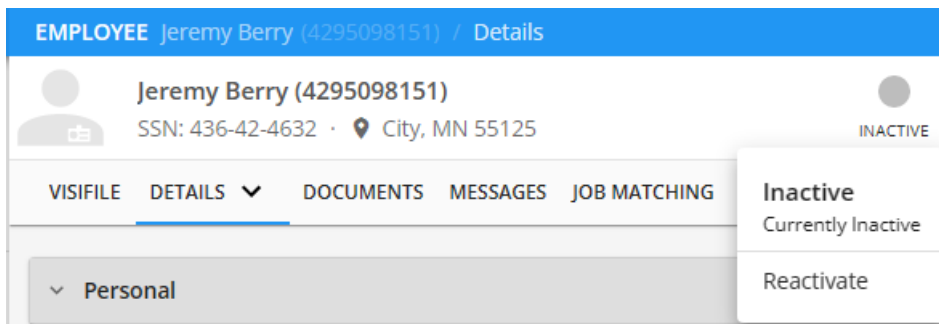
Once selected, a "Reactivate" message will automatically be logged on the employee profile, and their Status will be updated to "Active":
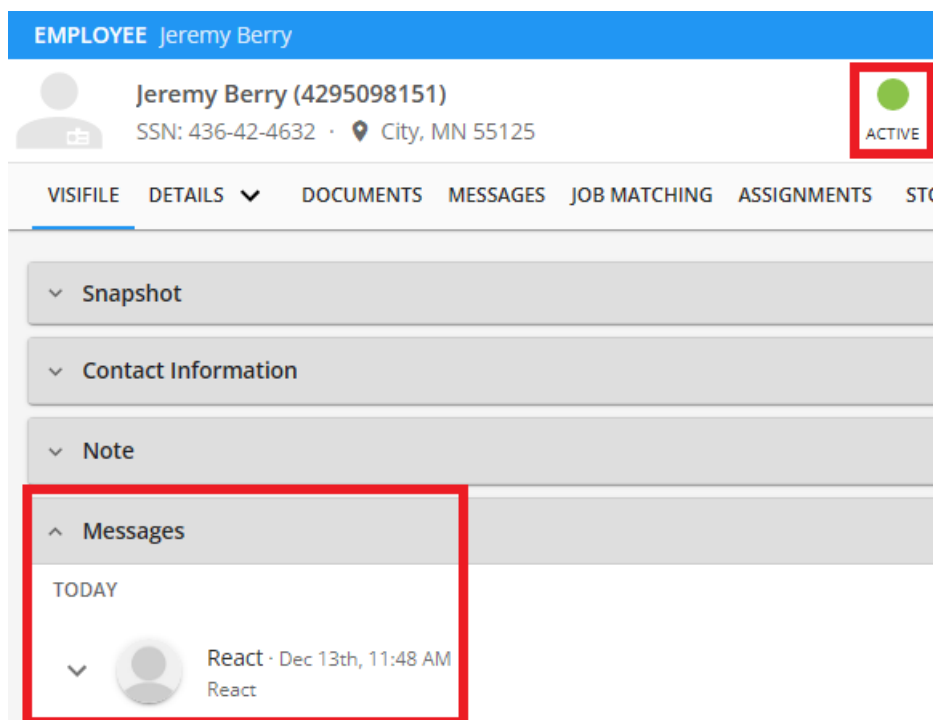
Alternatively, in the 'Messages' card, select the ⊕ button to open the "Compose Message" wizard:
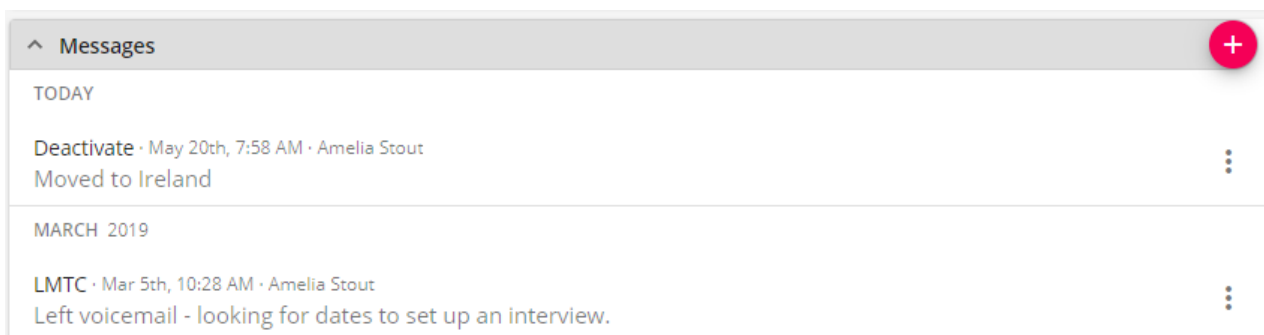
This time, choose an *action code* that starts with "react" and fits the reason as to why you are reactivating the employee's record. You may also expand on this by entering more information into the body of your message:

Reactivating Employees from Search Results

Employees are able to be Reactivated, en masse, from the Employee search results.

Begin by navigating to an Employee search within Beyond, searching for the employees that you would like to Reactivate, ensuring the Status is currently set to "Inactive" within the search:

Highlight the group of Employees that are to be Reactivated:

Either Right-Click or select the dropdown menu next to the "# selected employees", select the "Log Message for # Recipients" and select the option for "Reactivate":

Once the Reactivation is complete, a message will appear at the bottom of the screen indicating the amount of records that have been successfully Reactivated:

Search returned 15053 results

[5 selected employees ▼] Clear Selection

	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned
☑	4295037857	Candidate	Mister	Minneapolis		
☑	4294972436	Cannon	Davion	Minneapolis		
☑	4295015911	Cannon	Skylar	Minneapolis		
☑	4295038797	Capone	Allen	Minneapolis		
☑	4295026940	Car	Carol	Minneapolis		
☐	16134	Carbajal	Sharmaine	Minneapolis		
☐	16444	Carbondale	Elizabeth	Minneapolis		
☐	4295015761	Cardwell	Becky	Memphis NE		
☐	4295003620	Caril	Ryan	Minneapolis		
☐	4294971696	Carleo	Malik	Memphis NE		
☐	4295037338	Carley	Monica	Minneapolis		
☐	12628	Carlton	Jesse	Minneapolis		
☐	15843	Carpenter	Kelley		5 React messages logged	

Note The Employee Search results will need to be reloaded for the employees to be removed from the list.

What Happens When a Reactivation Message is Submitted?

The "Status" charm status will change to *active and green*.
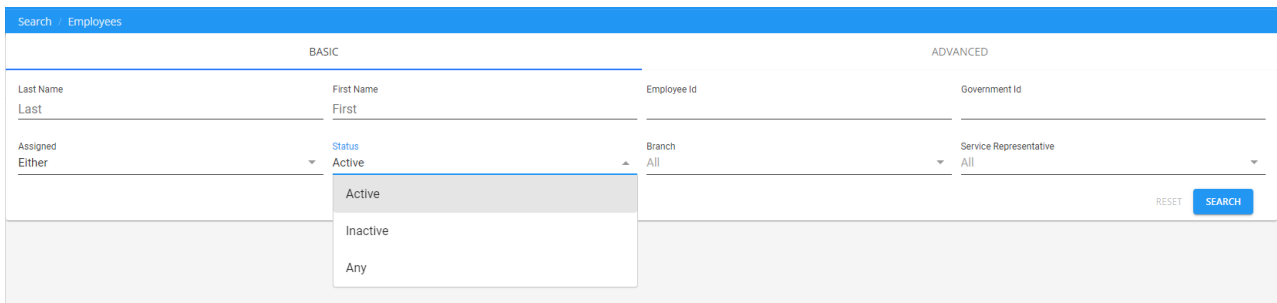
EMPLOYEE Jeremy Berry

Jeremy Berry (4295098151)
SSN: 436-42-4632 · 📍 City, MN 55125

● ACTIVE

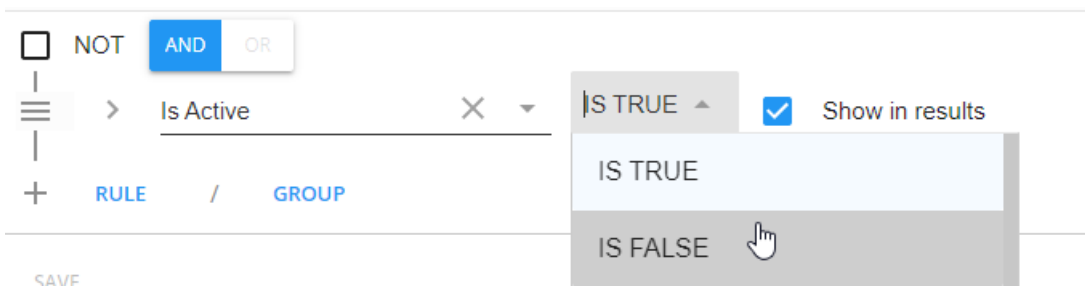The employee will be listed as *active* in search results.

Searching For Employees By Status

If you need to find an employee record that may be active or inactive, you can toggle your options in a basic employee search.

In Advanced Searching, you can also indicate whether you want active employees by adding the Is Active rule. True would mean only active employees and False would mean only inactive.

To learn more about searching, check out Beyond - Advanced Searching

Related Articles