

Beyond - How to Create an Assignment Record

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What is an Assignment?

An assignment record is the fulfillment of a job order for a customer. When a customer places an order for employees, it is the recruiters responsibility to create an assignment record for every employee intended to be placed on the order. This will help track placement history of each employee and create a timecard for this employee each week.

Active assignment records are those records that persist each week that the employee works. After the employee has finished an assignment, that assignment should be ended. Ended assignments are no longer considered active and will have an end date and status update to show they are completed.

Active assignments are important records for your front office team as they provide job details specific to that employee. They also are important for your back office team as each week a time card will be populated in the system for every active assignment based on the pay and bill rates listed there.

This article reviews:

- [1. How to Create an Assignment](#)
- [2. Searching for Assignments](#)

How to Create an Assignment

Note Before an assignment can be created, an order record must exist to tie it to. For help creating orders, check out [Beyond- How to Create an Order](#).

Navigate to the order you would like to create an assignment for. This can be done by utilizing an order that has been bookmarked or by searching for the order.

The screenshot displays the 'Job Order Search' interface. The search criteria are set to 'BASIC' and 'ADVANCED'. The search results table shows 6 results. The row for Job Order Id 4295033815 is highlighted with a red box. The table columns are: Job Order Id, Job Title, Customer Name, Department Name, Job Order Type, Pay Rate, Bill Rate, Start Date, Job Order Status, Positions Required, and Position.

Job Order Id	Job Title	Customer Name	Department Name	Job Order Type	Pay Rate	Bill Rate	Start Date	Job Order Status	Positions Required	Position
4295036752	Office Manager	Old Ed's Soda Shop	Primary	TE	22.00	33.00	1/25/2021	Unfilled	1	0
4295039010	Office Manager	Old Ed's Soda Shop	Primary	TE	22.00	33.00	1/25/2021	Unfilled	1	0
4295036658	Accountant	Old Ed's Soda Shop	Primary	TE	0.00	0.00	12/1/2020	Unfilled	2	0
4295033815	Customer Service Rep.	Old Ed's Soda Shop	Primary	TE	15.00	24.00	8/7/2019	Filled	3	6
4295036381	Special Project(s)	Old Ed's Soda Shop	Primary	TE	15.40	21.87	6/2/2020	Unfilled	3	1
4295036433	Timekeeper	Old Ed's Soda Shop	Primary	TE	0.00	0.00	7/22/2020	Unfilled	3	1

Once an order has been selected, Beyond will remember that this is the last order that was visited. When assignments are about to be created, the last order will be the order Beyond will want to create the assignment for.

There are three ways to create an assignment:

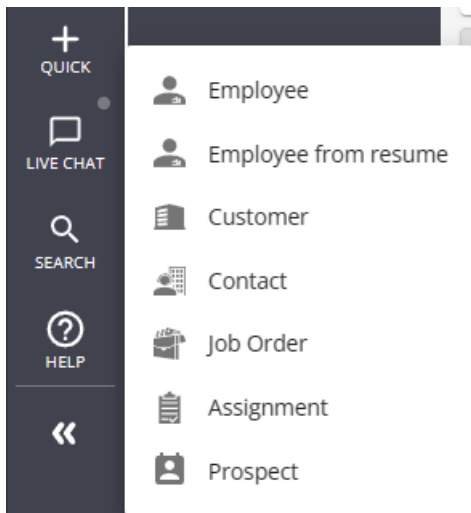
- The 'Quick Add' button
- Employee Search
- Order Record

The 'Quick Add' Button

To create an assignment, you must first view the order you would like to assign an employee to. The system will automatically try to assign an employee to the last order viewed.

The quick add button allows you to quickly add an assignment for an employee. It's important that you first know the employee you are going to assign. If you do not know who you are looking to assign, run an employee [search](#) first & find the employee you are looking for.

1. Select the "+ Quick" button in the lower left and select "Assignment" (assignment option will only be available once you have first viewed an order):



2. This will open the Add New Assignment wizard, Review the information:

Add New Assignment - Enter Assignment Information

1 Enter Assignment Information
2 Assignment Restrictions

Assigning To Job Order:

Old Ed's Soda Shop - Primary
 Customer Service Rep.: 6 of 3 positions filled

Start Date

8/7/2019
✕

- Double check the Job Order
- Enter the Start Date

3. Select the employee you are looking to assign

- If you were not viewing an employee record, you will need to search for the employee. Use the Last, First, SSN, or ID fields to search:

Please use the search to find an employee:

Last	First	SSN	Id
Aardson	Name		5759

- If you were on the employee's record that you wanted to assign, you will see their name selected at the bottom of the window:

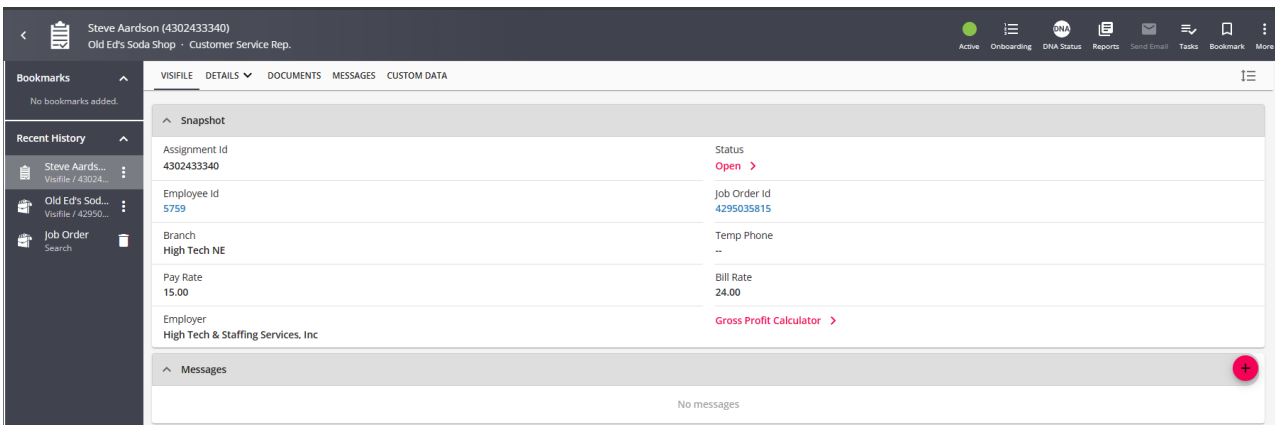
	Employee Id	Last Name	First Name	SSN
<input checked="" type="checkbox"/>	5759	Aardson	Steve	389648501

Rows per page: 10 ▼ 1 of 1

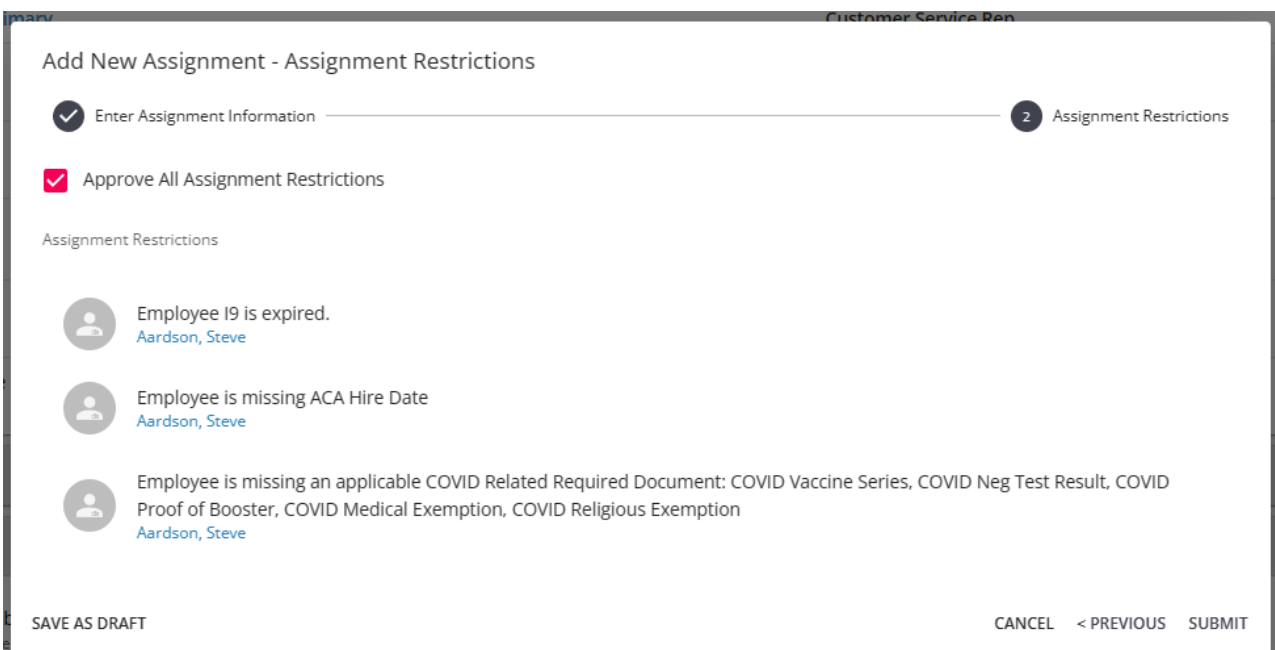
4. Select Submit

Once you have submitted an assignment, the system will check for assignment restrictions.

If no assignment restrictions are found, you will be redirected to the employee's assignment record.



If assignment restrictions are found, they will be displayed for the recruiter to review. Some restrictions can be approved by selecting the approve restrictions checkbox. Other restrictions will require the recruiter to return to the employee record to make changes before creating the assignment.



For more information on assignment restrictions see [Beyond - Assignment Restrictions](#).

Employee Search

To create an assignment, you must first view the order you would like to assign an employee to. The system will automatically try to assign an employee to the last order viewed.

When performing an employee search, one or more employees can be assigned from the search results page.

1. Navigate to employee search and select your search criteria:

BASIC ADVANCED

☰ Click to select a saved search... ^

NOT AND OR

> Is Active X IS TRUE ☑ Show in results X

> Interest Code X EQUALS Forklift X X

> Zip Code X CONTAINS 55121 ☑ Show in results X

+ RULE / GROUP

SAVE... RESET SEARCH

◦ For more information on searching, see [Beyond - Advanced Searching](#)

2. Select search and your search results will appear below:

Search returned 28 results
Interest Code, Is Active, Zip Code

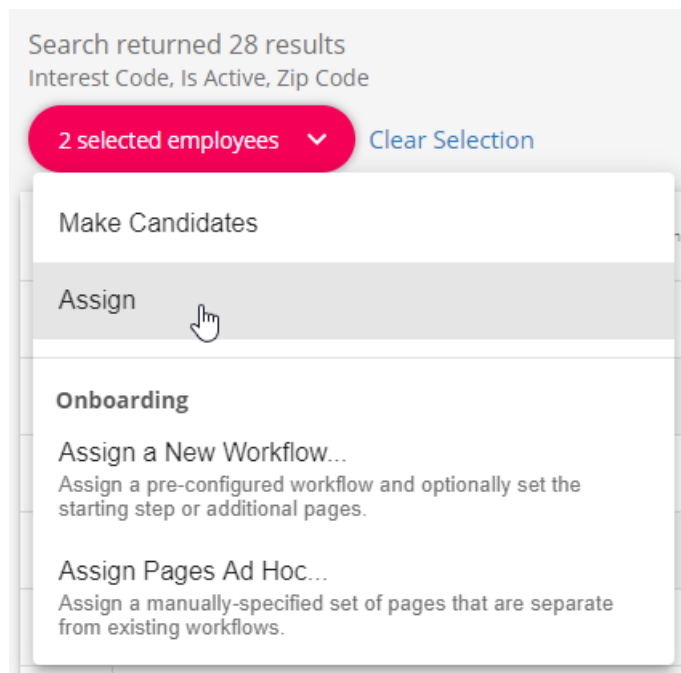
<input type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑
<input type="checkbox"/>	5759	Aardson	Steve
<input type="checkbox"/>	5412	Abbott	Sam
<input type="checkbox"/>	4295015070	Arnett	Julie
<input type="checkbox"/>	11971	Barker	Roberto
<input type="checkbox"/>	5414	Beach	Tracy
<input type="checkbox"/>	12698	Beck	Steve

3. Use the top check box to select all employees or pick and choose the number of employees you would like to assign:

2 selected employees Clear Selection

<input type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑
<input type="checkbox"/>	5759	Aardson	Steve
<input checked="" type="checkbox"/>	5412	Abbott	Sam
<input type="checkbox"/>	4295015070	Arnett	Julie
<input checked="" type="checkbox"/>	11971	Barker	Roberto

4. A new button will appear to show the total number of employees selected. Click on this button for more options:




5. Select Assign & the Add New Assignment wizard will open. Review the information and update any unique start dates:


Add New Assignment - Enter Assignment Information

1 Enter Assignment Information ————— 2 Assignment Restrictions ————— 3 Results

Assigning To Job Order:


 Angelucci's Flowers - Warehouse
Forklift: 1 of 5 positions filled

Employee:

 Roberto Barker (11971)
324723577

Start Date
5/15/2019 X

Employee:

 Sam Abbott (5412)
832475412

Start Date
5/15/2019 X


CANCEL [NEXT >](#)

6. Select Next, the system will double check for any assignment restrictions. Review and submit employee(s):

Add New Assignment - Assignment Restrictions


Enter Assignment Information Assignment Restrictions Results

Assigning To Job Order:


 Angelucci's Flowers - Warehouse
Forklift: 1 of 5 positions filled

Approve All Allowed Assignments

 Roberto Barker (11971)
324723577 Assign This Employee

 Sam Abbott (5412)
832475412 Approve Restrictions For This Employee

Assignment Restrictions

 Employee state (OH) does not match worksite state(MN)
[Angelucci's Flowers - Warehouse](#)

CANCEL < PREVIOUS [SUBMIT 1 ASSIGNMENT](#)


- For more information on assignment restrictions, see [Beyond - Assignment Restrictions](#).

7. The final step will confirm which assignments have been created and allow you to navigate to them by selecting the assignment number:

Add New Assignment - Results

Enter Assignment Information Assignment Restrictions Results

Assigning To Job Order:

 Angelucci's Flowers - Warehouse
Forklift: 1 of 5 positions filled

 Roberto Barker (11971)
324723577 [Assignment Created \(4301406203\)](#)

CANCEL < PREVIOUS [CLOSE](#)

Order Record

Navigate to the order record that requires the assignment and select the "Assignments" tab:

Note If you utilize custom Security Groups with Advanced Permissions, please add the access to the "Assignments" page within Job Order > Assignments to the Security Groups that require the functionality:

BY PAGE BY FIELD Selecting a parent selects children

🔍 assignment ✕

- ▼ Employee (5) Access
- ▼ Customer (3) Access
- ▲ Job Order Access
 - ▼ Visifile (3) Page Access
 - ▼ Details (2)
 - ▼ Candidates (1) Page Access
 - ▼ Candidate Matching (1) Page Access
 - Assignments** Page Access

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Old Ed's Soda Shop - Primary (4295035815)
Customer Service Rep.: 7 of 3 positions filled

Active Copy Order Reports Tasks Bookmark More

Bookmarks: No bookmarks added.

Recent History: Old Ed's Sod... Assignments / 4295035815, Job Order Search, Steve Aards... Visifile / 43024...

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA **ASSIGNMENTS**

Open

Search returned 5 results + NEW ASSIGNMENT

Assignment Id	Last Name	First Name	Customer	Department	Status	Job Title	Bill Rate	Pay Rate	Start Date
4302412894	Frodowald	Eric	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
4302413447	Chesler	Jodi	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
4302372287	Adams	Amy	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	8/7/2019
4302412576	Abocorabi	Deborah	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
4302433340	Aardson	Steve	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	8/7/2019

Rows per page: 20 1-5 of 5 < 1 >

Select "New Assignment:

Old Ed's Soda Shop - Primary (4295035815)
Customer Service Rep.: 7 of 3 positions filled

Active Copy Order Reports Tasks Bookmark More

Bookmarks: No bookmarks added.

Recent History: Old Ed's Sod... Assignments / 4295035815, Job Order Search, Steve Aards... Visifile / 43024...

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA **ASSIGNMENTS**

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4302412894	Frodowald	Eric	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
4302413447	Chesler	Jodi	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
4302372287	Adams	Amy	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	8/7/2019
4302412576	Abocorabi	Deborah	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
4302433340	Aardson	Steve	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	8/7/2019

Rows per page: 20 1-5 of 5 < 1 >

Follow the instructions as outlined previously within this article.

Searching for Assignments

You can search for an assignment record by selecting "Assignments" at the left or from within the BMenu > Records > Assignments.

The Assignment Search screen has two options including Basic and Advanced:

The screenshot shows the 'Assignment Search' screen in 'BASIC' mode. The interface includes a left sidebar with 'Bookmarks' (No bookmarks added), 'Recent History', and 'Assignment Search'. The main area has search criteria: Last Name (empty), First Name (empty), Customer Name (empty), Assignment Id (empty), Employee Id (empty), Status (Active), Branch (All), and Service Representative (All). There are 'RESET' and 'SEARCH' buttons at the bottom right.

The screenshot shows the 'Assignment Advanced Search' screen in 'ADVANCED' mode. The left sidebar includes 'Bookmarks', 'Recent History', 'Assignment Search', and 'Assignment Advanced Search'. The main area features a search builder with options for 'NOT', 'AND', 'OR', and 'RULE / GROUP'. A dropdown menu shows 'Field'. There are 'SAVE...', 'RESET', and 'SEARCH' buttons at the bottom.

Below are some examples of Assignment searches for both search areas. The below example uses the basic search area to do an assignment lookup. The search is looking for an active assignment for Christopher Robin.

The screenshot shows the 'Assignment Search' screen in 'BASIC' mode with search results. The search criteria are Last Name: Robin, First Name: Christopher, Status: Active, Branch: All, and Service Representative: All. The results table shows 2 results:

Assignment Id	Last Name	First Name	Customer Name	Department Na...	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Sup
4302361160	Robin	Christopher	100 Acre Woods, Inc. 2	Primary	Forklift	28.00	16.00	1/20/2020		Anc
4302361161	Robin	Christopher	100 Acre Woods, Inc. 2	Primary	Packer	13.00	10.00	1/19/2020		The

Rows per page: 20, 1-2 of 2, 1

The below example uses the Advanced search area to look for all active assignments for the customer 100 Acre Woods. For more information on searching in Beyond, see [Beyond - Advanced Searching](#).

The screenshot shows the 'Assignment Advanced Search' screen in 'ADVANCED' mode with search results. The search criteria are Active (IS TRUE) and Customer Name (CONTAINS 100 Acre Woods). The results table shows 12 results:

Assignment Id	Employee Name	Customer Name	Department Na...	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Supervisor
4302361132	Abbott, Guadalupe C	100 Acre Woods, Inc.	test2	Unknown	30	29	1/3/2020	1/3/2020	

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