

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 recruiter's 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.

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

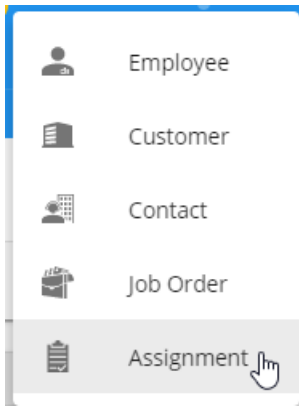
The 'Quick Add' Button

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  button in the upper right
2. Choose Assignment (assignment option will only be available once you have first viewed an order)




3. 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:

 Angelucci's Flowers - Warehouse
Forklift: 0 of 5 positions filled

Start Date

- Double check the Job Order
- Enter the Start Date

4. 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

5. 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.

Steve Aardson (4301406202)

Angelucci's Flowers · Forklift

VISIFILE
DETAILS
MESSAGES
CUSTOM DATA

^ Snapshot

Assignment Id	4301406202
Employee Id	5759
Branch	Minneapolis
Pay Rate	10.00
Employer	High Tech Staffing

^ Messages

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.

Add New Assignment - Assignment Restrictions

Enter Assignment Information 2 Assignment Restrictions

Approve All Assignment Restrictions

Assignment Restrictions

- Employee I9 is expired.
Aardson, Steve
- Employee is missing ACA Hire Date
Aardson, Steve

SAVE AS DRAFT

CANCEL < PREVIOUS SUBMIT

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:

Click to select a saved search...

NOT AND OR

Is Active IS TRUE Show in results

Interest Code EQUALS Forklift

Zip Code CONTAINS 55121 Show in results

+ 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:

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

2 selected employees ▼ [Clear Selection](#)

- Make Candidates
- Assign** 

Onboarding

- Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.
- Assign Pages Ad Hoc...
Assign a manually-specified set of pages that are separate from existing workflows.

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

Employee:

 Sam Abbott (5412)
832475412

Start Date
5/15/2019


CANCEL [NEXT >](#)

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

Add New Assignment - Assignment Restrictions


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

Assigning To Job Order:

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

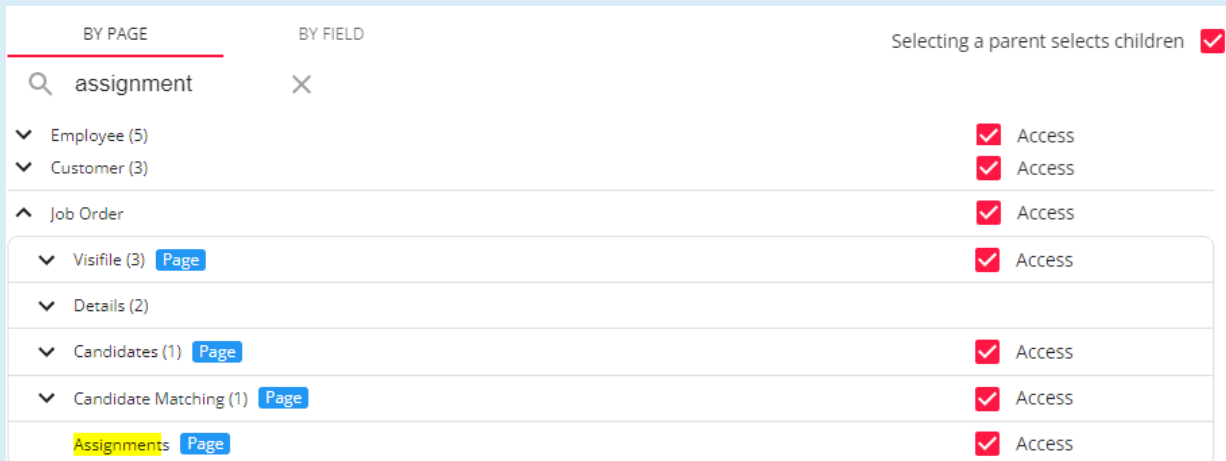
 Roberto Barker (11971)
324723577 **Assignment Created (4301406203)**

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:

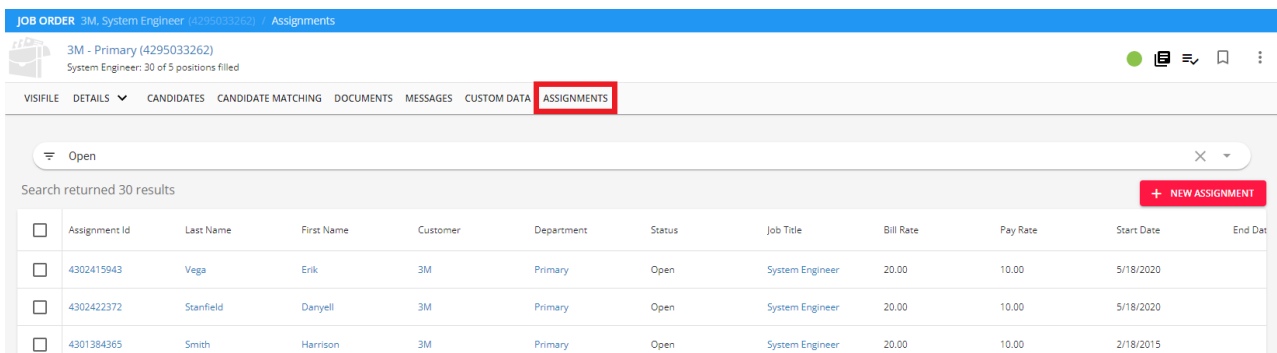


BY PAGE BY FIELD Selecting a parent selects children

assignment X

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

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



JOB ORDER 3M, System Engineer (4295033262) / Assignments

3M - Primary (4295033262)
System Engineer: 30 of 5 positions filled

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

Open X

Search returned 30 results [+ NEW ASSIGNMENT](#)

<input type="checkbox"/>	Assignment Id	Last Name	First Name	Customer	Department	Status	Job Title	Bill Rate	Pay Rate	Start Date	End Date
<input type="checkbox"/>	4302415943	Vega	Erik	3M	Primary	Open	System Engineer	20.00	10.00	5/18/2020	
<input type="checkbox"/>	4302422372	Stanfield	Danyell	3M	Primary	Open	System Engineer	20.00	10.00	5/18/2020	
<input type="checkbox"/>	4301384365	Smith	Harrison	3M	Primary	Open	System Engineer	20.00	10.00	2/18/2015	

Select "New Assignment":

JOB ORDER 3M, System Engineer (4295033262) / Assignments

3M - Primary (4295033262)
System Engineer: 30 of 5 positions filled

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS


Open

Search returned 30 results + NEW ASSIGNMENT







<input type="checkbox"/>	Assignment Id	Last Name	First Name	Customer	Department	Status	Job Title	Bill Rate	Pay Rate	Start Date	End Date
<input type="checkbox"/>	4302415943	Vega	Erik	3M	Primary	Open	System Engineer	20.00	10.00	5/18/2020	
<input type="checkbox"/>	4302422372	Stanfield	Danyell	3M	Primary	Open	System Engineer	20.00	10.00	5/18/2020	
<input type="checkbox"/>	4301384365	Smith	Harrison	3M	Primary	Open	System Engineer	20.00	10.00	2/18/2015	

Follow the instructions as outlined previously within this article.

Searching for Assignments

You can search for an assignment record by selecting  in the upper left or from within the **B** menu > Search:

Search

-  Employee Search >
-  Customer Search >
-  Contact Search >
-  Prospect Search >
-  Job Order Search >
-  Assignment Search >

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

Search / Assignments

BASIC ADVANCED

Last Name	First Name	Customer Name	Assignment Id
Employee Id	Status Any	Branch All	Service Representative All

RESET SEARCH

Search / Assignment / Advanced

BASIC → ADVANCED

Click to select a saved search...

NOT AND OR

> Field

+ RULE / GROUP

SAVE... RESET SEARCH

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 Paris Geller.

Search / Assignments

BASIC ADVANCED

Last Name: Geller, First Name: Paris, Customer Name: , Assignment Id:

Employee Id: , Status: Active, Branch: All, Service Representative: All

RESET SEARCH

Search returned 1 result

Assignment Id	Last Name	First Name	Customer	Department	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Supervisor
4301420055	Geller	Paris	PF Production	Corporate	Warehouse Worker	16.80	14.00	10/25/2021		Kennetz, Tor

Rows per page: 20 1 of 1 < 1 >

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

Search / Assignment / Advanced

BASIC ADVANCED

Click to select a saved search...

NOT AND OR

> Active IS TRUE Show in results

> Customer CONTAINS weston's bakery Show in results

SAVE... RESET SEARCH

Search returned 7 results
Active, Customer

Assignment Id	Employee Name	Customer	Department	Job Title	Bill Rate	Pay Rate	Start Date	End Date	Supervisor	Supervisor P
4301407497	Dawson, Jack	Weston's Bakery	Primary	Loader-unloader	22.66	13.25	1/15/2020			
4301406614	Forrester, Dean	Weston's Bakery	Primary	Baker	22.4	16	9/9/2019			860555497
4301406807	Gilmore, Lorelai Lei	Weston's Bakery	Primary	Baker	34.2	20	10/7/2019		Weston, Fran	86011543
4301406892	Johannson, Annie	Weston's Bakery	Primary	Baker	22.5	15	10/28/2019			860555497
4301406744	Smith, Andrea	Weston's Bakery	Primary	Forklift	25.5	17	9/30/2019			
4301406661	Smith, Tommy	Weston's Bakery	Primary	Baker	24	16	9/12/2019			
4301406862	Spartan, Sparty	Weston's Bakery	Primary	Baker	21	14	10/22/2019			860555497

Related Articles