

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.

Bookmarks

- Old Ed's Soda Shop. Custo...
Vasfile / Job Order / 4295035815

Recent History

- Job Order
Search
- Old Ed's Soda Shop. Custo...
Vasfile / Job Order / 4295035815
- Dashboard

Search returned 5 results

<input type="checkbox"/>	Job Order Id	Job Title	Customer Name	Department Name	Job Order Type	Pay Rate	Bill Rate	Start Date	Job Order Status	Positions Required	Pos
<input type="checkbox"/>	4295036752	Office Manager	Old Ed's Soda Shop	Primary	TE	22.00	33.00	1/25/2021	Unfilled	1	0
<input type="checkbox"/>	4295036658	Accountant	Old Ed's Soda Shop	Primary	TE	0.00	0.00	12/1/2020	Unfilled	2	0
<input type="checkbox"/>	4295035815	Customer Service Rep.	Old Ed's Soda Shop	Primary	TE	15.00	24.00	8/7/2019	Filled	3	6
<input type="checkbox"/>	4295036381	Special Project(s)	Old Ed's Soda Shop	Primary	TE	15.40	21.87	6/2/2020	Filled	3	1
<input type="checkbox"/>	4295036453	Timekeeper	Old Ed's Soda Shop	Primary	TE	0.00	0.00	7/22/2020	Unfilled	3	1

Rows per page: 20 1/5 of 5

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

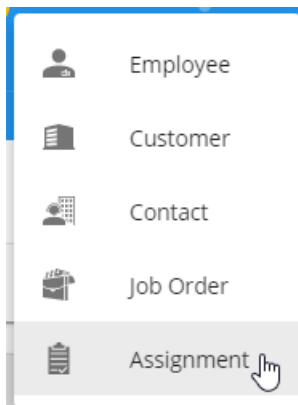
The 'Quick Add' Button

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:

BASIC
ADVANCED

☰ 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](#)

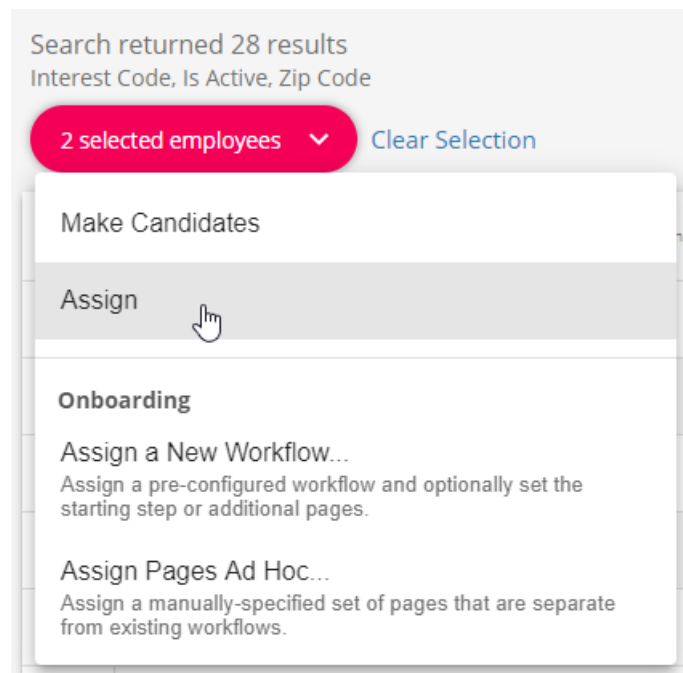
2. Select search and your search results will appear below:

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:

<div style="background-color: #e91e63; color: white; padding: 5px 10px; border-radius: 10px; display: inline-block;">2 selected employees ▾</div> 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

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

1 Enter Assignment Information 2 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

Search: assignment X

Selecting a parent selects children ☒

- 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](#)".

JOB ORDER Old Ed's Soda Shop, Customer Service Rep. (4295035815) / Assignments

Old Ed's Soda Shop - Primary (4295035815)
Customer Service Rep.: 6 of 3 positions filled

ACTIVE REPORTS TASKS COPY ORDER BOOKMARK MORE

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

Open

Search returned 6 results [+ NEW ASSIGNMENT](#)

<input type="checkbox"/>	Assignment Id	Last Name	First Name	Customer	Department	Status	Job Title	Bill Rate	Pay Rate	Start Date
<input type="checkbox"/>	4302412894	Frodowald	Eric	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
<input type="checkbox"/>	4302413447	Chesler	Jodi	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020
<input type="checkbox"/>	4302427921	Berry	Jeremy	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	25.50	17.00	8/4/2020
<input type="checkbox"/>	4302377287	Adams	Amy	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	8/7/2019
<input type="checkbox"/>	4302377233	Acosta	Marlin	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/11/2020
<input type="checkbox"/>	4302412576	Abootorabi	Deborah	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020

Rows per page: 20 1-6 of 6 < 1 >

Select "New Assignment:

JOB ORDER Old Ed's Soda Shop, Customer Service Rep. (4295035815) / Assignments

Old Ed's Soda Shop - Primary (4295035815)
Customer Service Rep.: 6 of 3 positions filled

ACTIVE REPORTS TASKS COPY ORDER BOOKMARK MORE

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

Open

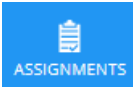
Search returned 6 results [+ NEW ASSIGNMENT](#)

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<input type="checkbox"/>	4302377233	Acosta	Marlin	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/11/2020
<input type="checkbox"/>	4302412576	Abootorabi	Deborah	Old Ed's Soda Shop	Primary	Open	Customer Service Rep.	24.00	15.00	5/18/2020

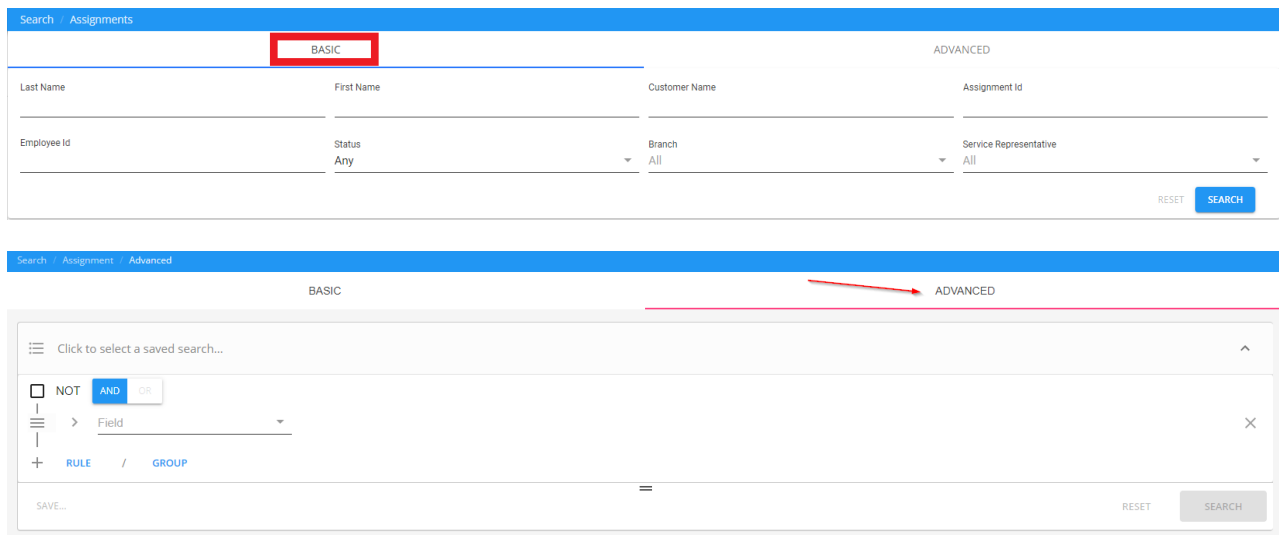
Rows per page: 20 1-6 of 6 < 1 >

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  Menu > Records > Assignments.

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...

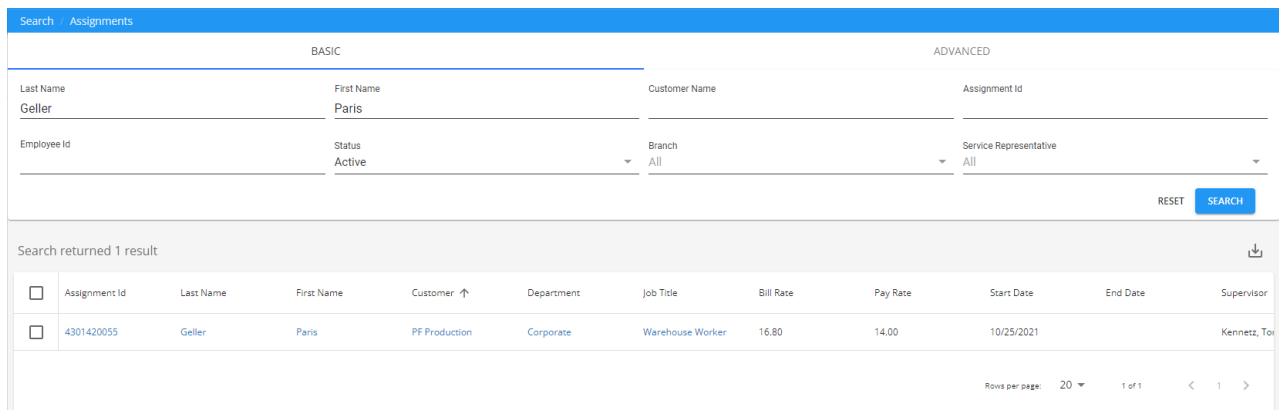
NOT AND OR

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 First Name Customer Name Assignment Id

Geller Paris

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, To

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

+

RULE

/

GROUP

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

860111543

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