

# Beyond - Advanced Searching

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## Searching

The goal of any database is to collect as much information as possible. As a record becomes more and more detailed through data entry and tools like HRCenter™, it becomes easier and easier to find the right employees later on. The better your data, the easier and more variable your searching can become.

The goal of this article is to walk the user through the basics of record searching within Beyond™. In addition, we will also examine our more advanced options.

### This article reviews:

1. [Basic Searching vs. Advanced Searching](#)
2. [Basic Searching Options](#)
3. [Advanced Searching Options](#)
4. [Search Results](#)

**\*Note\*** Looking for other kinds of searches? Check out the following:

- [Onboarding](#)
- [Web Users](#)
- [Background Checks](#)
- [E-Verify Cases](#)
- [Near Me](#)

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## Basic Searching vs Advanced Searching

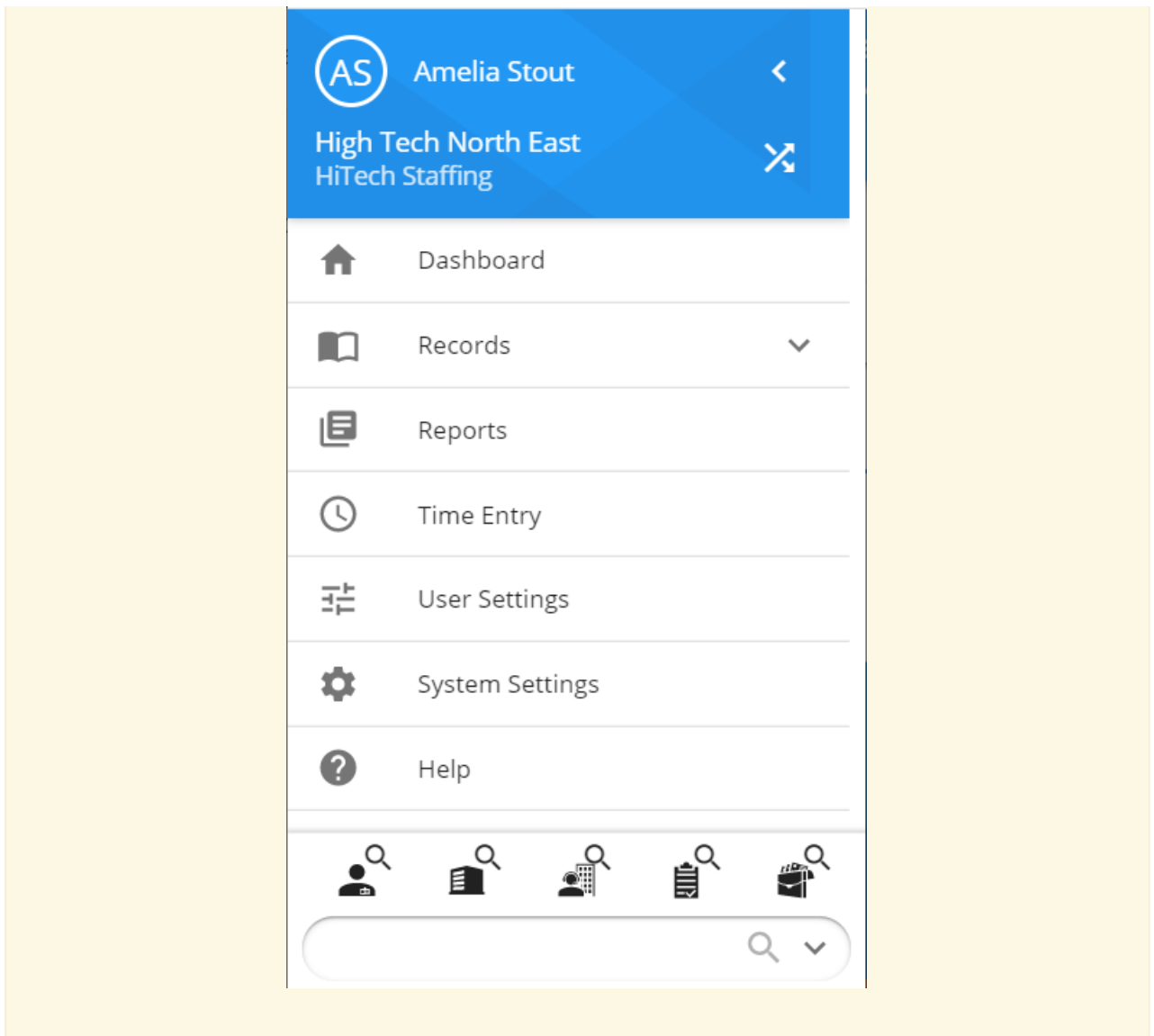
In Beyond, [Basic Searching](#) is used to typically find a singular record, whereas an [Advanced Search](#) is run to create a list of results or multiple records that adhere to a set criteria.

To conduct either of these searches, locate the five principle records in the upper left hand corner of the screen:

From left to right, the five principle records are:

1. **Employee**- Records of individuals who could be placed on assignment in your system.
2. **Customer**- The clients and businesses your company services.
3. **Contact**- The individuals associated with Customer records in your system who are not considered your employees.
4. **Assignment**- The record of an employee's employment. This will always be tied to a Job Order.
5. **Job Order**- The request of a customer for employees, typically defined best by worksite and job title.

**\*Note\*** If you do not see the record type searches in the upper left, you can find them in the  menu.



To perform any search, select the record type of the desired search. For example, a recruiter might select to search Employee records for an employee that recently called in as 'Available' in a logged message:



Once selected, this will usher the user into the searching area. The user can first select whether they would like to conduct a Basic or Advanced search:

BASIC		ADVANCED	
Last Name	<input type="text"/>	First Name	<input type="text"/>
Id	<input type="text"/>	Govt ID	<input type="text"/>
Assigned	Either	Status	Active

[^ FEWER FILTERS](#)
RESET
SEARCH

**\*Note\*** Depending on the type of search, the screen layout will appear differently. The screen shot above is a Basic search for employees.

## Basic Searching

Basic searching is just that- designed to find a specific record. Options include searching by:

BASIC			ADVANCED		
Last Name	First Name	Id	Govt ID	Assigned	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Either	Active

RESET
SEARCH

- **Last**- The last name of the record.
- **First**- The first name of the record.
- **ID**- The individual ID of the record.
- **Govt ID**- The Social Security Number or other Government ID of the Employee (can be with or without hyphens or spaces)
- **Assigned**- A drop-down filter allowing the user to select only those that are assigned, unassigned, or either.
- **Status**- A drop-down filter allowing the user to select only those that are active, inactive or either.

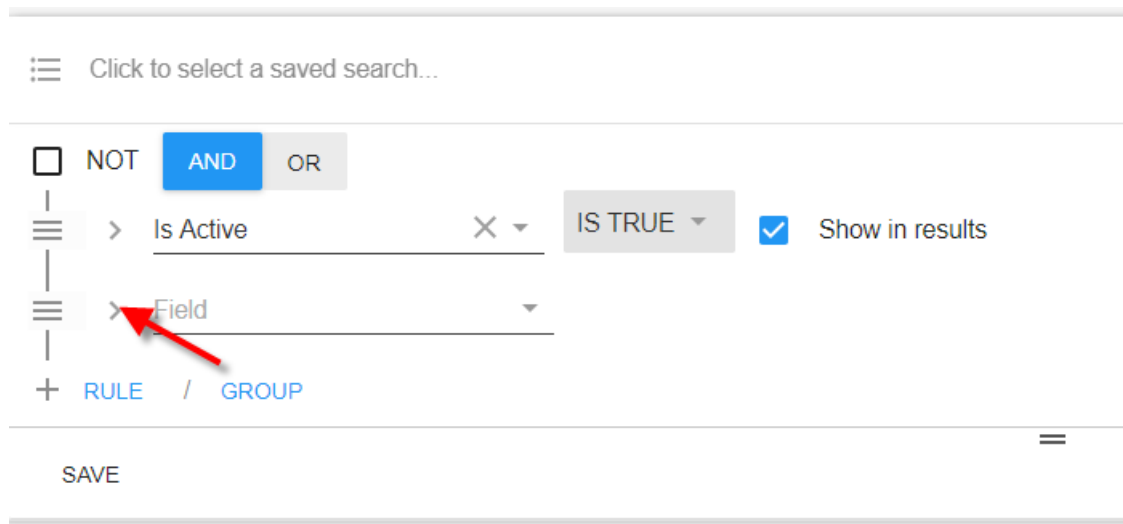
**\*Note\*** Depending on the record type being searched, the above fields may vary.

When a search returns results, those results will be posted in the lower half of the screen:

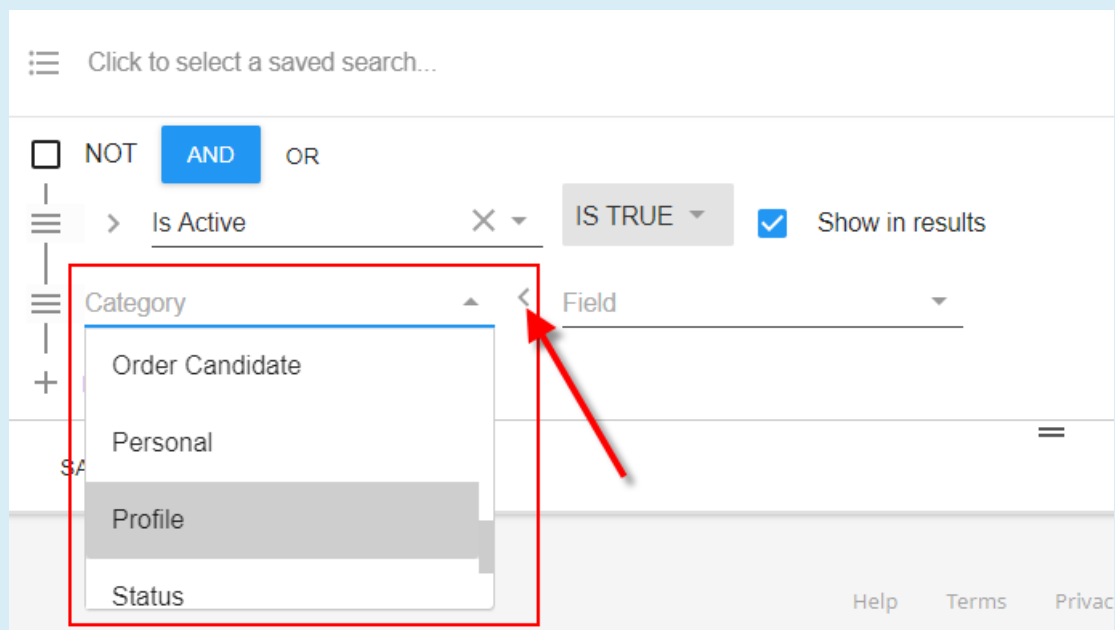
BASIC				ADVANCED		
Last smith	First Name	Id	Govt ID	Assigned Either	Status Active	
						RESET SEARCH
Search returned 216 results						↓
<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned
<input type="checkbox"/>	4295094440	Smith	Abbi	St.Paul	✓	✓
<input type="checkbox"/>	4295079656	Smith	Abigail	St.Paul	✓	✓

**\*Trainer Tip\*** When searching for a record, partial information can be searched on. In addition, a "wildcard search" can be performed if you are unsure of a name. A wildcard is represented by the % sign beside the text. See the example below:





**\*Trainer Tip\*** If you are unsure what fields can be searched for in Beyond, select the caret beside the field, this will add the category field as well. This can be useful for learning about new searchable fields.



Those rules will be connected by the group concept of "AND." This says that any record must have all listed criteria in the statement to appear in the results:

☰ Click to select a saved search...

☐ NOT **AND** OR

☰ > Is Active X ▾ IS TRUE ▾  Show in results

☰ Status X ▾ < Is Assigned X ▾ IS FALSE ▾  Show in results

☰ > Interest Code X ▾ EQUALS ▾ 3rd Shift X ▾

+ RULE / GROUP

SAVE

For example, in the statement above, a user might look for employees that are {active "AND" unassigned "AND" have the interest code of 3rd shift}.

## Groups

Groups act as sections of rules within a statement that are to be run first when compared to the rest of the rules within the statement. Within a group, you must first define the kind of group. There are three basic kinds of groups:

1. 'AND' Groups
2. 'OR' Groups
3. 'NOT' Groups

## AND

This is an exclusive group and will only return results for records that possess all the criteria within the group. Let's look at an example statement:

☐ NOT **AND** OR

☰ > Message Action X ▾ EQUALS ▾ Available X ▾

☰ > Message Date X ▾ IS ON OR AFTER ▾ Value

Value is required.

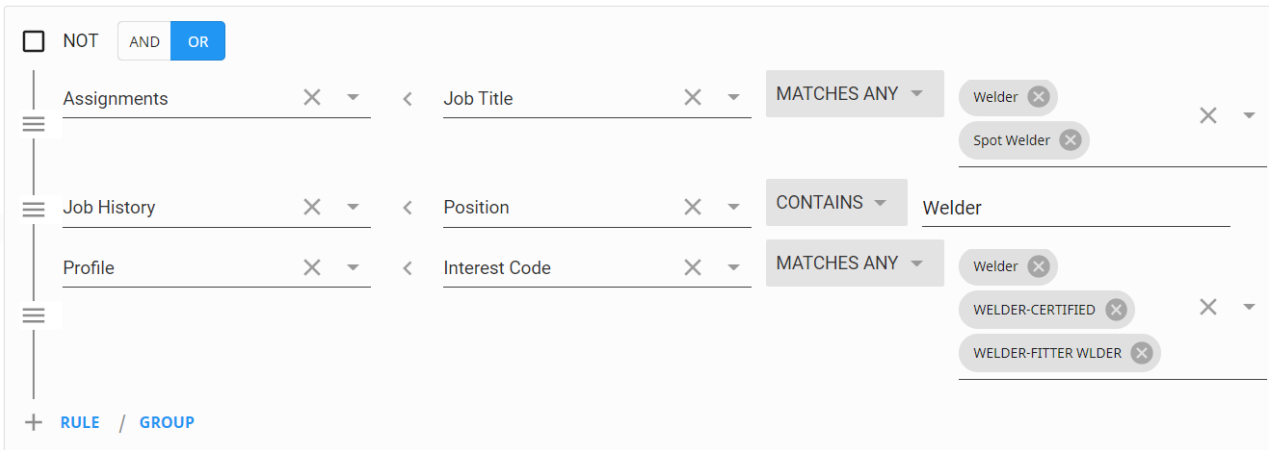
+ RULE / GROUP

In this case, we are looking for employees that have a message logged with the action code of Available AND the message was logged on or after a specific date.

## OR

This is an inclusive group and will return results with records that qualify for any of the criteria within the group. Let's look at an example statement:





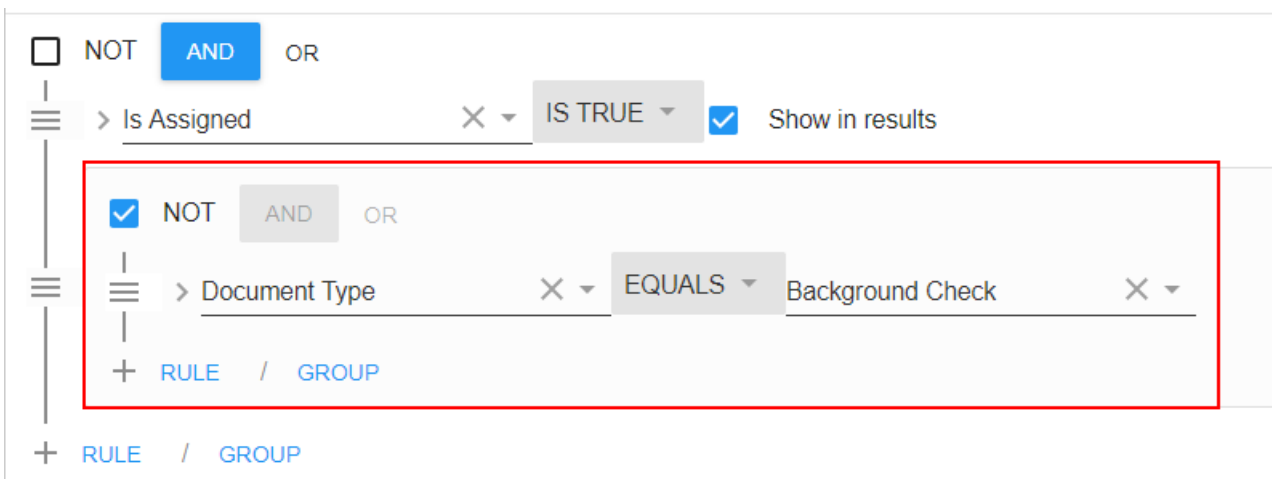
In this example, we are looking for a candidate for a welding position. So we are looking for an employee that has either:

- Had an assignment with us as a welder OR
- In their resume job history (on the story tab) have had a position as a welder OR
- Has an interest code that matches Welder/Welder-certified, etc.

The employees in the search results will have to meet at least one of these criteria (but not have to have all 3).

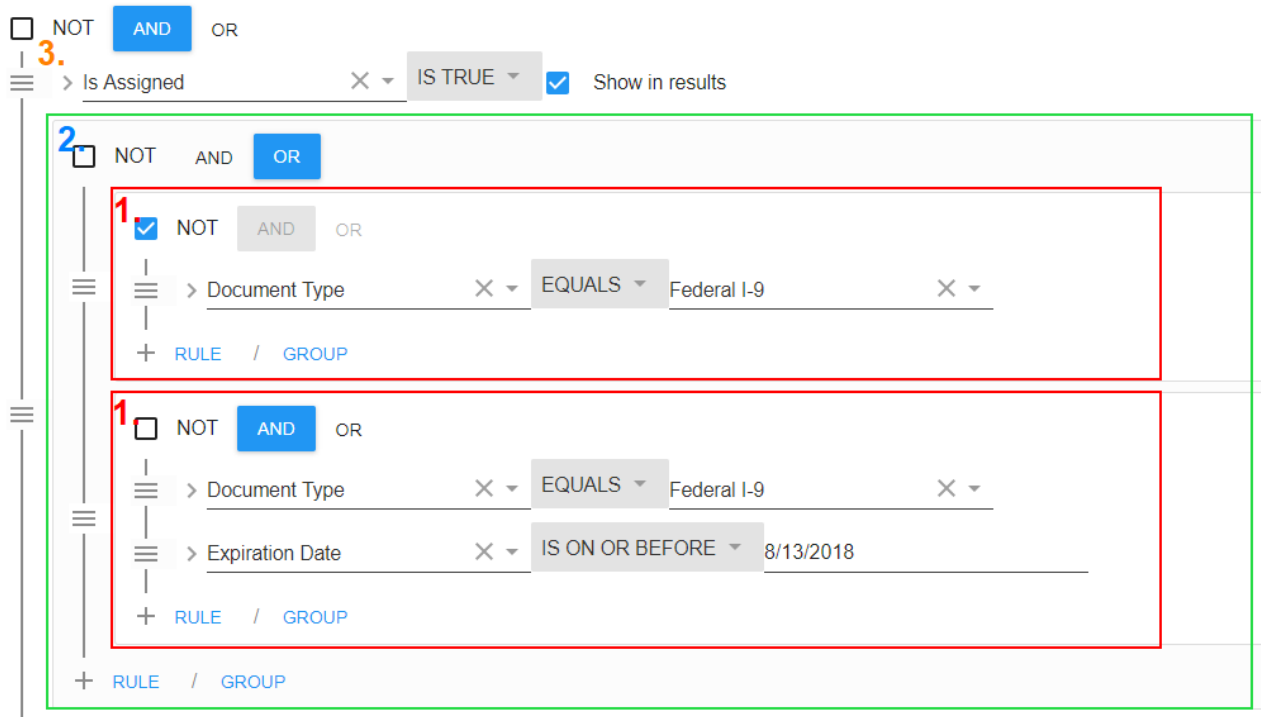
## NOT

This allows the searcher to locate information that does not exist. This is used primarily to audit records for missing information. Lets look at an example statement:



In the example statement above, the user is looking for people who are assigned do NOT have a background check document on file.

You can mix and match using AND OR & NOT options in a search and utilize groups within groups to customize your searches. For example, If you need to audit your system to see which assigned employees don't have a current I-9 on file.



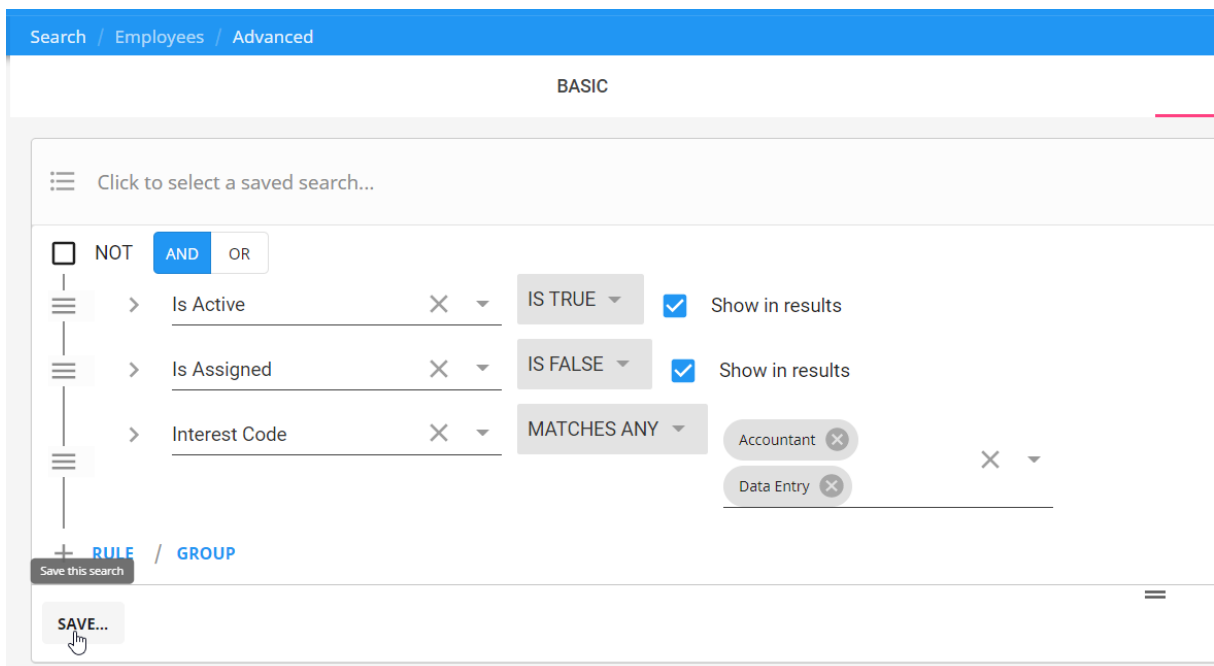
1. First you add the rule denoting that you are looking for assigned employees.
2. Next you create a group and set it to OR because to audit the system you are looking for employees who do NOT have an I-9 OR employees who have an I-9 but it's expired.
3. Then you create 2 groups inside that OR group you created
  - One group will have a single rule that is a NOT Document Type = Federal I-9 stating you want employees that do not have an I-9 on file
  - The second group will have 2 rules stating you are looking for employees that have a Federal I-9 and the Expiration Date is on or before today's date so you see who has expired I-9s

## Saving an Advanced Search

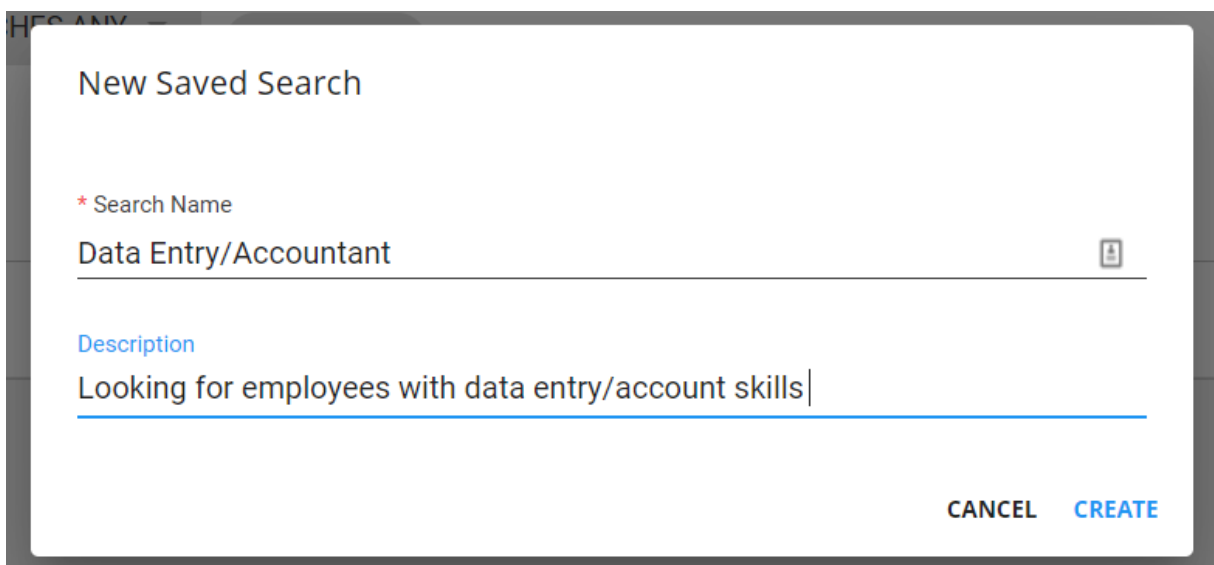
Once you have set up an advanced search the way you like it, you can save this search to save yourself time. It is important to note that saving a search does not save the results of a search but instead saves the rules and groups established for the search.

### To save an advanced search:

1. Create the search criteria exactly as you want it saved
2. Select the save button in the lower left

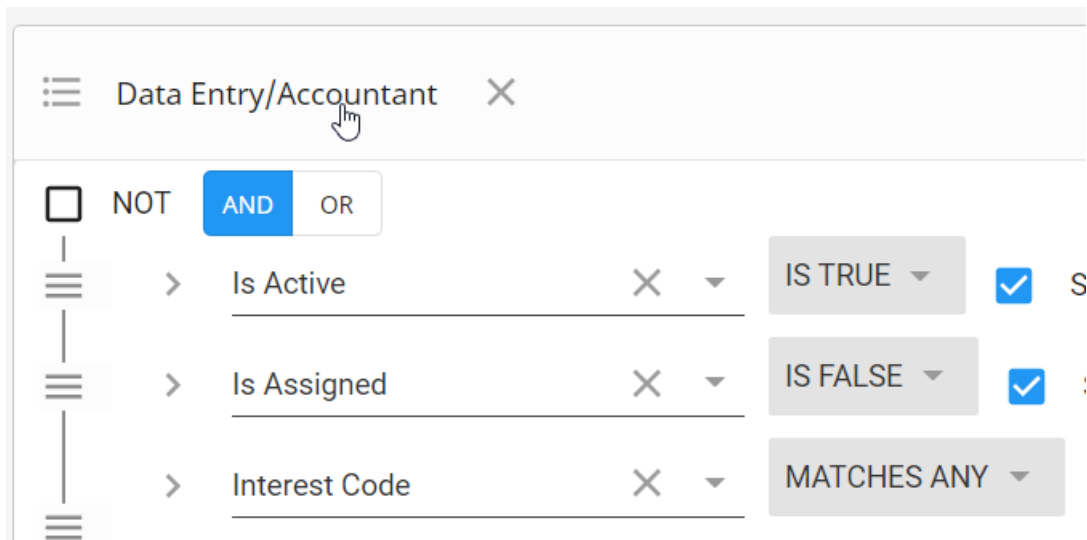


3. Enter a name for the search
4. Optionally, enter a description to help remind you what the search is used for:

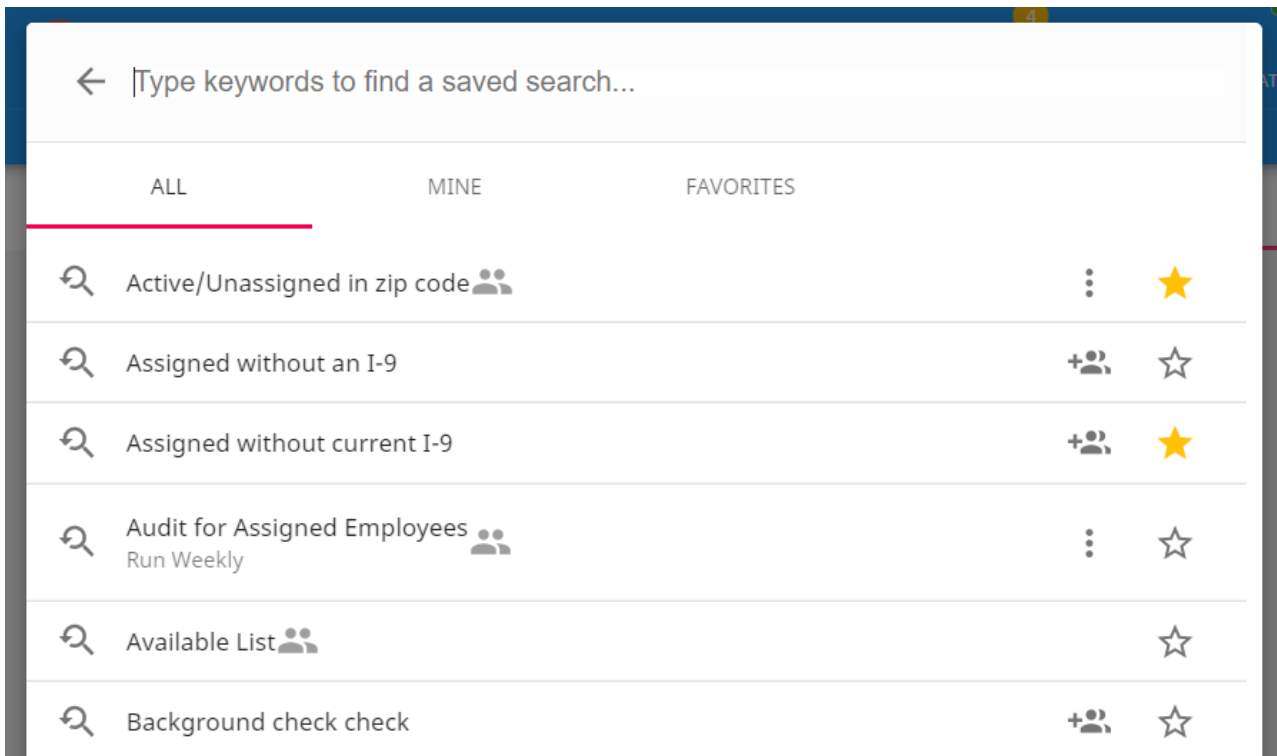


5. Select Create

To find a saved search, select the white bar at the top of the advanced search options:



You can search for a saved search by typing a name or scrolling through the list.



- Select the star icon to mark a search as a favorite. Favorite searches appear in the favorite tab.
- The Mine tab will limit your list to searches you have created.

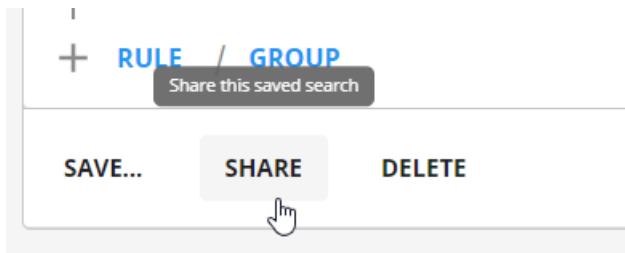
### Sharing an Advanced Search

By sharing an advanced search you are allowing other users to utilize one of your saved searches.

To share an advanced search:

1. Select a saved search you want to share

2. Select the Share button in the lower left



3. Choose the Team you want to share with (teams are set up by your administrators)

4. Select Submit to share



A shared search can be identified by the share icon located next to the name of the search.



**\*Note\*** Teams must be set up by your administrators, check out [Beyond - Creating & Managing Service Rep Teams](#) for more information.

## Search Results

Once a search has been ran, regardless of whether it was a basic or advanced, the results will display below it.

BASIC

ADVANCED

Active Ready to Work People X

NOT **AND** OR

> Is Active X IS TRUE  Show in results X

> Is Assigned X IS FALSE  Show in results X

> Washed Status X EQUALS Familiar X

Show in results

> Hire Status X EQUALS Eligible and Active X

Show in results

+ RULE / GROUP

SAVE...

SHARE v

DELETE

RESET

SEARCH

Search returned 694 results

Hire Status, Is Active, Is Assigned, Washed Status



<input type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑	Branch	Phone
<input type="checkbox"/>	4295003834	Abbott	Darrell	10 -Eval SE	
<input type="checkbox"/>	12959	Abrams	Terri	10 -Eval SE	5742325400
<input type="checkbox"/>	4295080856	Adams	Tracy	Minneapolis	
<input type="checkbox"/>	4295083377	Aikman	Troy	Minneapolis	

### Organizing Search Results:

You can rearrange columns by holding and dragging the column header:

NOT  AND  OR

- > Is Active  IS TRUE  Show in results
- > Is Assigned  IS FALSE  Show in results
- > Washed Status  EQUALS Familiar  Show in results
- > Hire Status  EQUALS Eligible and Active  Show in results

Search returned 694 results  
 Hire Status, Is Active, Is Assigned, Washed Status


<input type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑	Branch	Phone	Is Active	Is Assigned
<input type="checkbox"/>	4295003834	Abbott	Darrell	10 -Eval SE		✓	⊘
<input type="checkbox"/>	12959	Abrams	Terri	10 -Eval SE	5742325400	✓	⊘
<input type="checkbox"/>	4295080856	Adams	Tracy	Minneapolis		✓	⊘
<input type="checkbox"/>	4295083377	Aikman	Troy	Minneapolis		✓	⊘

Right click to change which columns are shown:

<input type="checkbox"/>	Employee Id	Last Name ↑	Branch	Phone
<input checked="" type="checkbox"/>	4295003834	Abbott	10 -Eval SE	
<input type="checkbox"/>	12959	Abrams	10 -Eval SE	5742325400
<input type="checkbox"/>	4295080856	Adams	Minneapolis	
<input type="checkbox"/>	4295083377	Aikman	Minneapolis	
<input type="checkbox"/>	25927	Alaska	Labor Hall 101	
<input type="checkbox"/>	25930	Allen	Labor Hall 101	

- Employee Id
- Last Name
- First Name
- Branch
- Phone
- Is Active
- Is Assigned
- Last Message



By selecting a column you can reorganize your results and order them alphabetically. The up arrow indicates the list is being sorted A-Z the down arrow indicates they are being displayed Z-A:

Employee Id	Last Name 
4295003834	Abbott
12959	Abrams

### Functionality with Search Results

You can click on the blue highlighted name or ID to be brought to the related record or, in some cases, you can select multiple search results for more functionality.



To select multiple search results, tap the square to the left of the result

<input type="checkbox"/>	Employee Id	Last Name 	First Name 
<input checked="" type="checkbox"/>	4295003834	Abbott	Darrell
<input type="checkbox"/>	12959	Abrams	Terri

To select all results, tap the square at the top of the results - this will select all records shown,

Search returned 694 results  
Hire Status, Is Active, Is Assigned, Washed Status

20 selected employees Select all 694 results?

<input checked="" type="checkbox"/>	Employee Id	Last Name 	First Name 
<input checked="" type="checkbox"/>	4295003834	Abbott	Darrell
<input checked="" type="checkbox"/>	12959	Abrams	Terri
<input checked="" type="checkbox"/>	4295080856	Adams	Tracy
<input checked="" type="checkbox"/>	4295083377	Aikman	Troy
<input checked="" type="checkbox"/>	25927	Alaska	Joe
<input checked="" type="checkbox"/>	25930	Allen	Donna
<input checked="" type="checkbox"/>	4295080492	Anderson	Andrea

To select all results click the text above:







Search returned 694 results  
Hire Status, Is Active, Is Assigned, Washed Status

20 selected employees ▼ [Select all 694 results?](#)

<input checked="" type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑
<input checked="" type="checkbox"/>	4295003834	Abbott	Darrell
<input checked="" type="checkbox"/>	12959	Abrams	Terri
<input checked="" type="checkbox"/>	4295080856	Adams	Tracy
<input checked="" type="checkbox"/>	4295083377	Aikman	Troy
<input checked="" type="checkbox"/>	25927	Alaska	Joe

Select the Actions button to see a list of available actions

20 selected employees ▼ [Select all 12157 results?](#)

-  Email 7 Recipients
-  Make Candidates
-  Make Job Offers
-  Assign

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**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.

<input checked="" type="checkbox"/>	4295003562	Abandon 3	Invoice
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Check out this table for what actions you have available for each search:

Record Search	Additional Search Functionality
	<ul style="list-style-type: none"> <li>Email Recipients</li> <li>Make Candidates (on last order viewed)</li> <li>Make Job Offers (on last order viewed)</li> </ul>

Record Search	Additional Search Functionality
	<ul style="list-style-type: none"> <li>• Onboarding:               <ul style="list-style-type: none"> <li>◦ Assign a New Workflow</li> <li>◦ Assign Pages Ad Hoc</li> </ul> </li> </ul>
Order Search	<ul style="list-style-type: none"> <li>• Mass Update Rates</li> </ul>
Assignment Search	<ul style="list-style-type: none"> <li>• Mass Update Rates</li> <li>• Mass Update Assignments</li> <li>• Assign A New Workflow</li> </ul>
Contact Search	<ul style="list-style-type: none"> <li>• Email Recipients</li> </ul>

## Related Articles