Beyond - Recruiter Manual

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Welcome to Beyond™ for Recruiters!

TempWorks® Beyond is our mobile friendly front office applicant tracking system (ATS). It works seamlessly with Enterprise, our full back office solution. Beyond helps your recruiters who are always on the go stay organized and track all the necessary information in an easy to use software package.

This guide is here to provide a road map for front office recruiters or staffing specialists to help them understand the full functionality of Beyond.

When we talk about Recruiters or Staffing Specialists, we mean anyone who works with employees to help find them a job. This can include:

- Managing Employees & Applicants
- Creating & Managing Customer Requests
- Assigning Employees to a Job

New to Beyond?

If you are brand new to Beyond, check out our Beyond Starter Pack which is packed with articles for all users. Looking for a place to start? Check out:

- Beyond How to Log In
- Beyond Record Types
- Beyond Dashboard
- Beyond Hierarchy

Note If you are looking for more training, we offer weekly webinars that you (or your admin) can find and sign up for via Bridge.

The following sections of this guide provide links to articles to learn about different functionality. These sections are separated by record type and are organized to help you navigate from basic functionality to some of our more advanced options all with the recruiter responsibilities in mind.

Managing Employees & Applicants

What is an Employee Record?

The Employee section of Beyond includes all applicants, current & past employees. These records contain

information such as current employment status, compliance documents, past jobs, skills, and more.

Check out the following links to learn more about the employee record:

Employee Record Basics

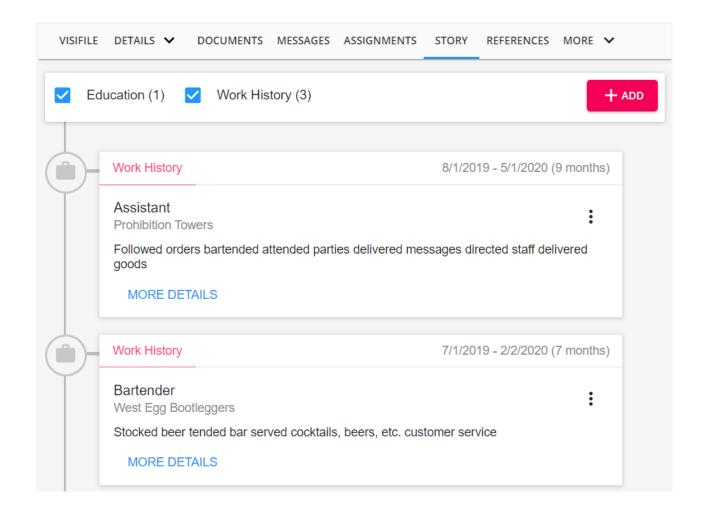
Start with the following articles to gather more fundamental knowledge related to employee records.

- Beyond How to Create an Employee Record
- Beyond The Visifile
- Beyond Washed Status
- Beyond How to Deactivate and Reactivate Employee Records
- Beyond Message Logging

Tracking Employee Information

Every staffing company needs to track different sets of information about the employee to find them the right job. Check out the following options for tracking information on the employee record:

- Beyond How to Attach a Resume to an Employee Record
- Beyond How to Create an Employee Record Story
- Beyond Managing Employee Interest Codes
- Beyond Documents

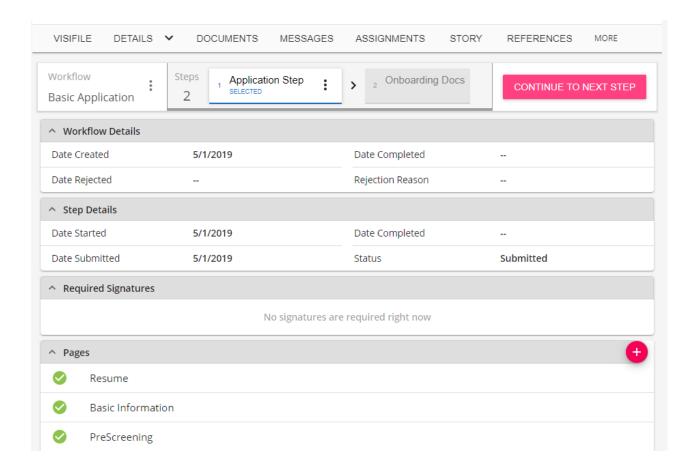


Using HRCenter™ with Beyond

If you are utilizing HRCenter, our online application and onboarding solution, check out the following videos and articles for more information:

- Beyond Onboarding
- Beyond Managing Web User Account
- Beyond How to Assign a New HRCenter Workflow or Page
- Beyond Utilizing Recruiter First Workflows

Note If you are new to HRCenter, check out our TempWorks University HRCenter Minor for Beyond Users: Beyond University: HRCenter Minor Overview. This series of videos walks through how Beyond & HRCenter work together to provide a seamless onboarding experience for your employees complete with quizzes and questions to get your recruiters thinking.



Employee Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this page) and take notes or discuss these questions with your team:

Question	Answer
How will most employee records be entered into your	
system?	
Will applicants be filling out an online application? If yes, what will it include?	
Will you be using HRCenter for onboarding documents? If yes, what kinds of additional forms need to be added?	

Question	Answer
What are all the requirements before an employee's washed status can be changed to 'Familiar'?	
What types of interactions do you want to track by logging messages(ex. left voicemail, scheduled interview, etc.)? What Message Action Codes will you need to use?	
What interest codes do you want to have in the system to quickly tag employees with?	
What fields on the employee record are going to be required for you to fill out? What kinds of information do you need to enter or track to create better searches?	
Will you be saving documents on the employee file or keeping them in filing cabinets? Which documents do all employees need before they can be assigned?	

Create & Manage Customer Requests

What is an Order Record?

The Order record contains information regarding all job openings (requisitions, openings, requests) placed by customers. Order records hold valuable information including shift times, start dates, financial details, worksite details etc.

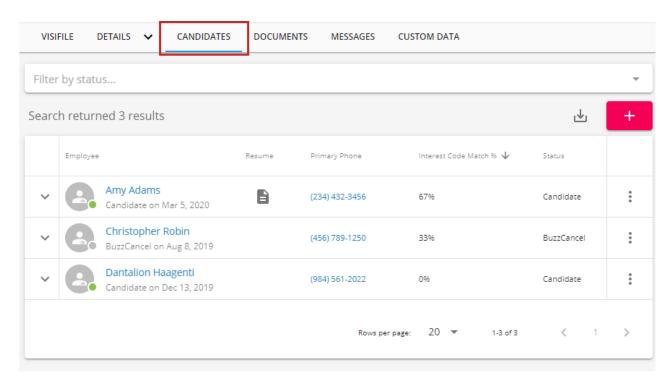
Check out the following links to learn more about the order record:

Order Basics

Start with the following basic order options for making your order creation and management easy:

- Beyond How to Create an Order
- Beyond Managing Customer Defaults
- Beyond How to Track Candidates on an Order

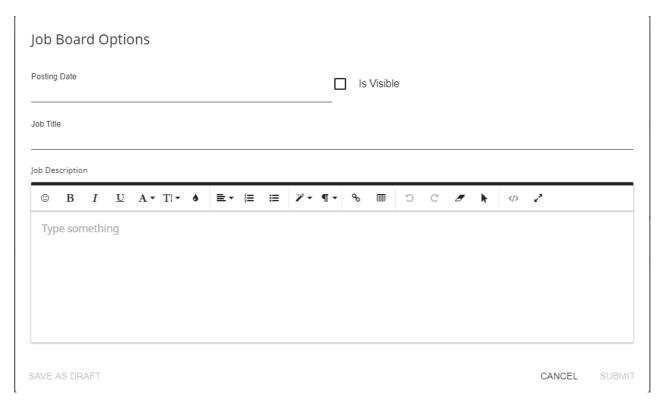
• Beyond - Searching for Orders & Job Order Statuses



Advanced Order Topics

Check out the following articles for more advanced order options:

- Beyond Managing Order Interest Codes
- Beyond Posting Jobs to Your TempWorks Job Board
- Beyond Utilizing Order Contact Roles
- Beyond Departments vs Worksites
- Beyond Documents



Order Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this article) and take notes or discuss these questions with your team:

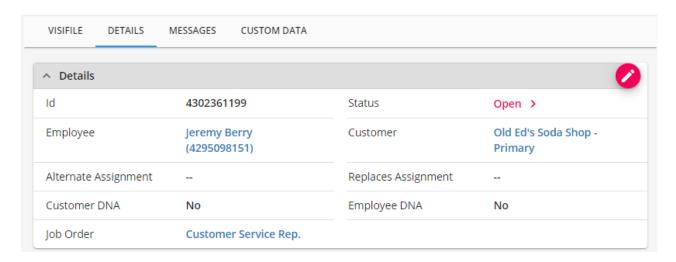
Question	Answer
Who on your team will be taking order requests from	
customers and entering them in the system?	
Who will be adding customer defaults to make order	
creation easier? What defaults will you be using for most	
customers?	
Will you be saving documents to your Orders?	
Will you be posting to the TempWorks Job Board?	
What kinds of order searches will you be doing regularly?	

Question	Answer
How will you track candidates you are considering for an	
order?	

Assign Employees to a Job

What is an assignment record?

Contains data regarding all placements made by your organization(s). Assignments are created off order records and are what tie the employee to a position. The information gathered from assignment records directly communicates to the back office (payroll and invoicing) portion of Enterprise.



Check out the following links to learn more about the assignment record options:

Assignment Basics

Use the following links to learn more about creating assignments and managing candidates

- Beyond How to Create an Assignment Record
- Beyond Assignment Details Overview
- Beyond How to End an Assignment
- Beyond Understanding Assignment Restrictions
- Beyond Message Logging



Enter Assignment Information



Assignment Restrictions

One or more restrictions cannot be approved. Please correct the records as indicated below or select a different combination of employee and job order.

Assignment Restrictions



Cannot approve: Employee status is unwashed, Please verify employee details and update washed status.

Adams, Tracy



The employee is missing the following interest code: 7 Panel Drug Tested Adams, Tracy



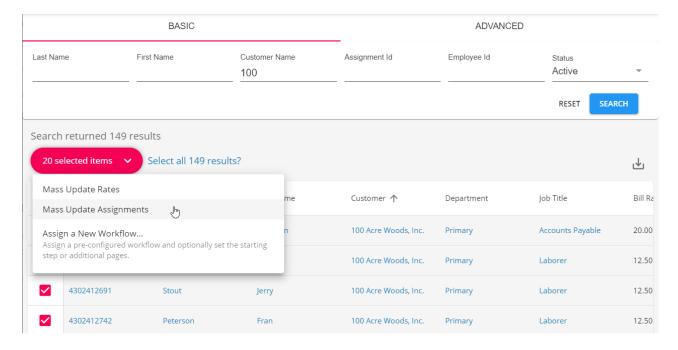
Employee I9 has not been received. Adams, Tracy



Employee is missing ACA Hire Date Adams, Tracy

Advanced Assignment Topics

- Beyond Extending an Assignment
- Beyond How to Mass Update Assignments
- Beyond How to Mass Update Rates
- Beyond Advanced Searching



Assignment Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this article) and take notes or discuss these questions with your team:

Question	Answer
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Question	Answer
Will you be using the Candidate Tab to track employees	
that you are considering for work? If yes, what statuses	
will you be using?	
How will you document check in calls with the supervisor	
or employee?	
How will your team handle assignment restrictions? Will	
you be utilizing required interest codes?	
Who will be responsible for ending the assignment when the employee is done working?	
the employee is done working.	
What must be completed on the customer and/or order record before your team can make any assignments?	
record before your team carrillane any assignments:	

Related Articles