

# 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.*

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## 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](#)

VISIFILE DETAILS ▼ DOCUMENTS MESSAGES ASSIGNMENTS STORY REFERENCES MORE ▼


☑ Education (1) ☑ Work History (3) + ADD

 **Work History** 8/1/2019 - 5/1/2020 (9 months)

**Assistant** Prohibition Towers ⋮

Followed orders bartended attended parties delivered messages directed staff delivered goods

[MORE DETAILS](#)

 **Work History** 7/1/2019 - 2/2/2020 (7 months)

**Bartender** West Egg Bootleggers ⋮

Stocked beer tended bar served cocktails, beers, etc. customer service

[MORE DETAILS](#)

## 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.

VISIFILE   DETAILS ▾   DOCUMENTS   MESSAGES   ASSIGNMENTS   STORY   REFERENCES   MORE

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Workflow: Basic Application   Steps: 2   1 Application Step SELECTED > 2 Onboarding Docs   **CONTINUE TO NEXT STEP**

^ Workflow Details

Date Created	5/1/2019	Date Completed	--
Date Rejected	--	Rejection Reason	--

^ Step Details

Date Started	5/1/2019	Date Completed	--
Date Submitted	5/1/2019	Status	Submitted

^ Required Signatures

No signatures are required right now

^ Pages +

- Resume
- Basic Information
- PreScreening

### 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](#)

VISIFILE	DETAILS	<b>CANDIDATES</b>	DOCUMENTS	MESSAGES	CUSTOM DATA	
Filter by status... <span>▼</span>						
Search returned 3 results <span>↓</span> <span>+</span>						
	Employee	Resume	Primary Phone	Interest Code Match % <span>↓</span>	Status	
▼	 <b>Amy Adams</b> Candidate on Mar 5, 2020		(234) 432-3456	67%	Candidate	⋮
▼	 <b>Christopher Robin</b> BuzzCancel on Aug 8, 2019		(456) 789-1250	33%	BuzzCancel	⋮
▼	 <b>Dantalion Haagenti</b> Candidate on Dec 13, 2019		(984) 561-2022	0%	Candidate	⋮
Rows per page: 20 <span>▼</span> 1-3 of 3 <span>&lt;</span> 1 <span>&gt;</span>						

## 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](#)

## Job Board Options

Posting Date

\_\_\_\_\_

Is Visible

Job Title

\_\_\_\_\_

Job Description

☺ B I U A ▾ T! ▾ 🔥 ☰ ▾ ☰ ▾ ☰ ▾ 🖋 ▾ 📏 ▾ 🔗 📄 ↺ ↻ ✍ 🖱 </> ↗

Type something

SAVE AS DRAFT

CANCEL

SUBMIT

## 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.

VISIFILE	DETAILS	MESSAGES	CUSTOM DATA
^ Details 			
Id	4302361199	Status	Open >
Employee	<a href="#">Jeremy Berry (4295098151)</a>	Customer	<a href="#">Old Ed's Soda Shop - Primary</a>
Alternate Assignment	--	Replaces Assignment	--
Customer DNA	No	Employee DNA	No
Job Order	<a href="#">Customer Service Rep.</a>		

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](#)







## Add New Assignment - Assignment Restrictions

- 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](#)

BASIC			ADVANCED		
Last Name	First Name	Customer Name	Assignment Id	Employee Id	Status
		100			Active
					<a href="#">RESET</a> <a href="#">SEARCH</a>
Search returned 149 results					
20 selected items		<a href="#">Select all 149 results?</a> 			
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">                     Mass Update Rates                 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">                     Mass Update Assignments                 </div> <div style="border: 1px solid #ccc; padding: 5px;">                     Assign a New Workflow...                      Assign a pre-configured workflow and optionally set the starting step or additional pages.                 </div>					
			Customer ↑	Department	Job Title
			100 Acre Woods, Inc.	Primary	Accounts Payable
			100 Acre Woods, Inc.	Primary	Laborer
<input checked="" type="checkbox"/>	4302412691	Stout	Jerry	100 Acre Woods, Inc.	Primary
<input checked="" type="checkbox"/>	4302412742	Peterson	Fran	100 Acre Woods, Inc.	Primary
					Bill Re
					20.00
					12.50
					12.50

## 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?	
What must be completed on the customer and/or order record before your team can make any assignments?	

## Related Articles