Beyond - How to Upload Resumes in Bulk

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Bulk Uploading Resumes

Within Beyond, you have the ability to upload resumes in bulk. This functionality allows for employees to be created more quickly and efficiently when uploading resumes.

This article includes:

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2. Uploading Resumes In Bulk
3. Duplicate Checking
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6. Merging Employees from Uploaded Resumes
7. Deleting Staged Employees

Getting Started

Begin by navigating to the B Menu > Resume Management > Resume Upload.

> *Note* There are no specific security permissions required to access this functionality.

Within the 'Resume Upload' window, by default, you will see all of the uploaded resumes that are under your Service Rep name:


> *Note* To change this view to be of a different Service Rep, select the 'Resumes Uploaded By' dropdown and

select the Service Rep to view the list of resumes uploaded by them. To view all resumes that have been uploaded by all Service Reps, select 'Show All' within the dropdown:
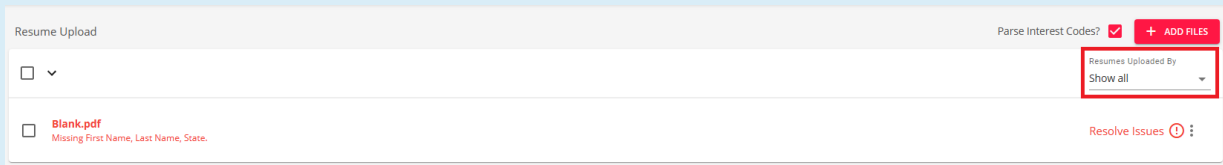
Upon the initial viewing of the 'Resume Upload' window, you will be shown a tooltip stating that you are able to simply drag and drop a resume, group of resumes, or folder containing resumes within the window at any time:
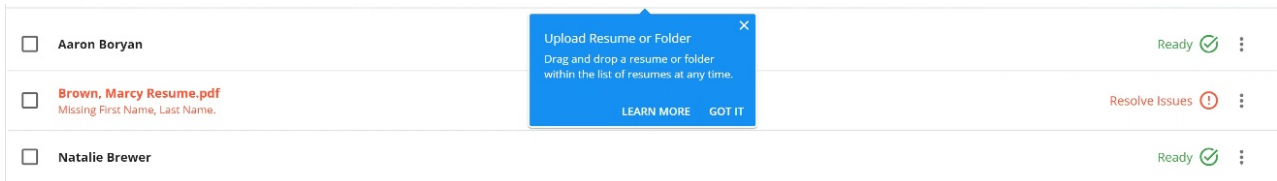
Note By selecting 'Got It' within the tooltip, the tooltip will be dismissed forever. By selecting the 'X' at the top right corner of the tooltip, the tooltip will be dismissed for your login session. Once you log into Beyond again and navigate to the Upload Resume window, the tooltip will reappear until dismissed.

Uploading Resumes In Bulk

Resumes are able to be uploaded in bulk via three methods.

Note When uploading resumes en masse, it is recommended to stay within the threshold of 1000 resumes within a single upload.

Note Resumes must be one of the following supported formats and can have a maximum file size of 2MB:
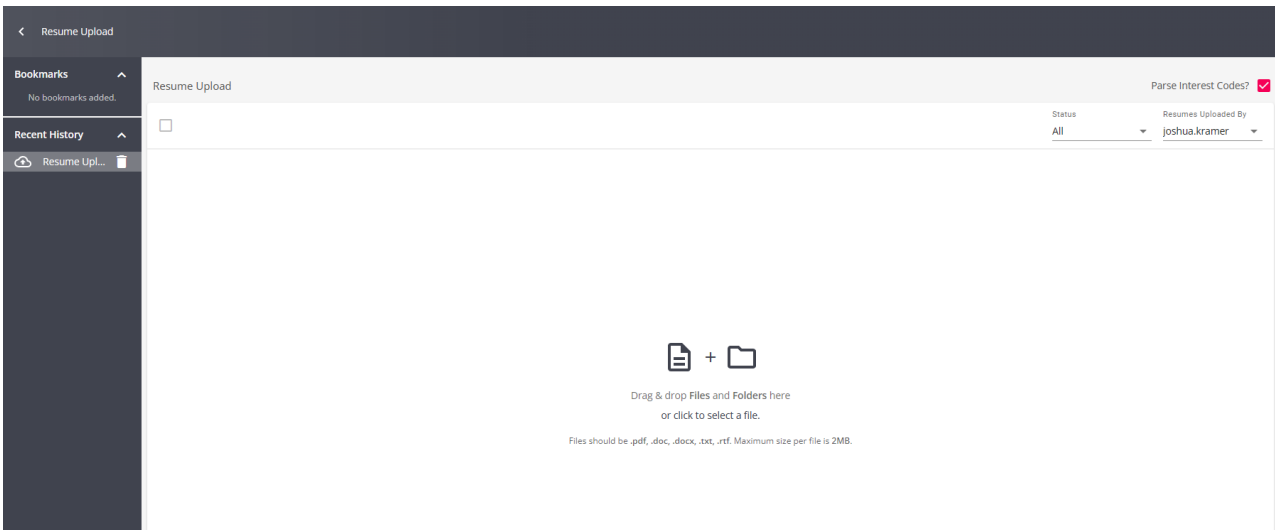
- .pdf
- .doc
- .docx
- .txt
- .rtf

Note When uploading resumes, you have the ability to parse interest codes. To do this, select the checkbox

that states 'Parse Interest Codes' before uploading the resume(s):

First Upload Method

When you navigate to the Upload Resume window for the very first time, or if you do not have any uploaded resumes, you will be shown the following:


To upload a resume, or group of resumes, either drag and drop from your file destination to the 'Resume Upload' window, or select the option that states 'or click here to select a file' to open a File Explorer window where you can navigate to your file destination and upload from there into the 'Resume Upload' window:
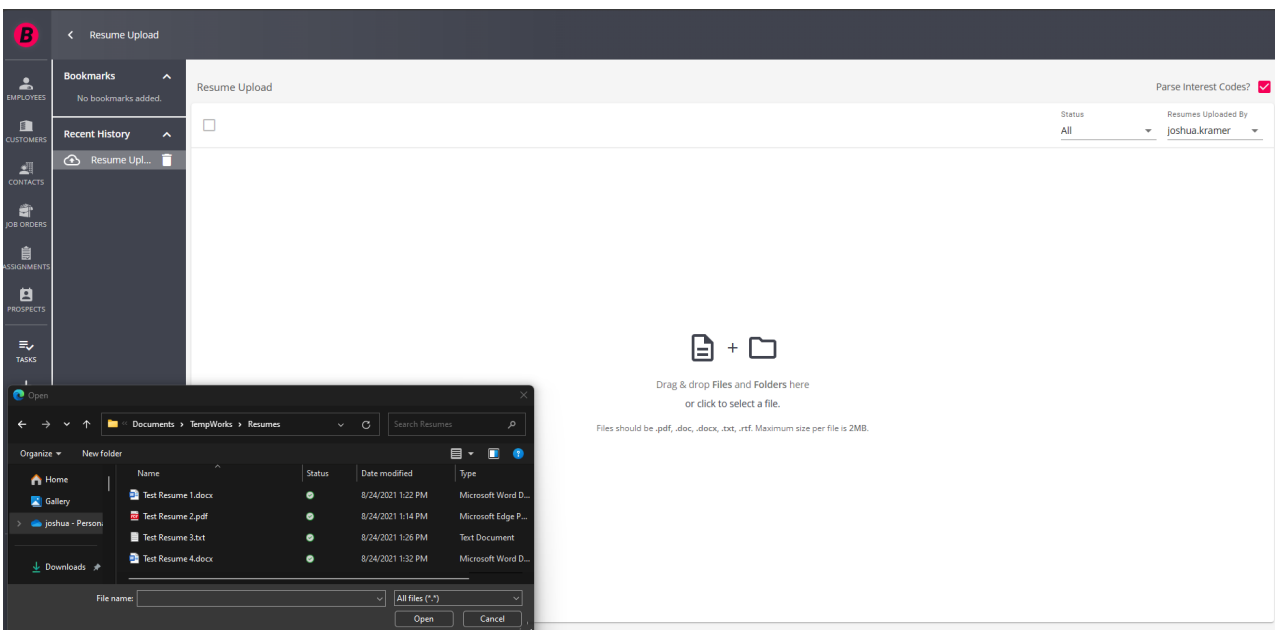
Drag and Drop Method

This method is able to be done regardless if you have already uploaded resumes.

To upload a resume, or group of resumes, drag and drop from your file destination to the 'Resume Upload' window:
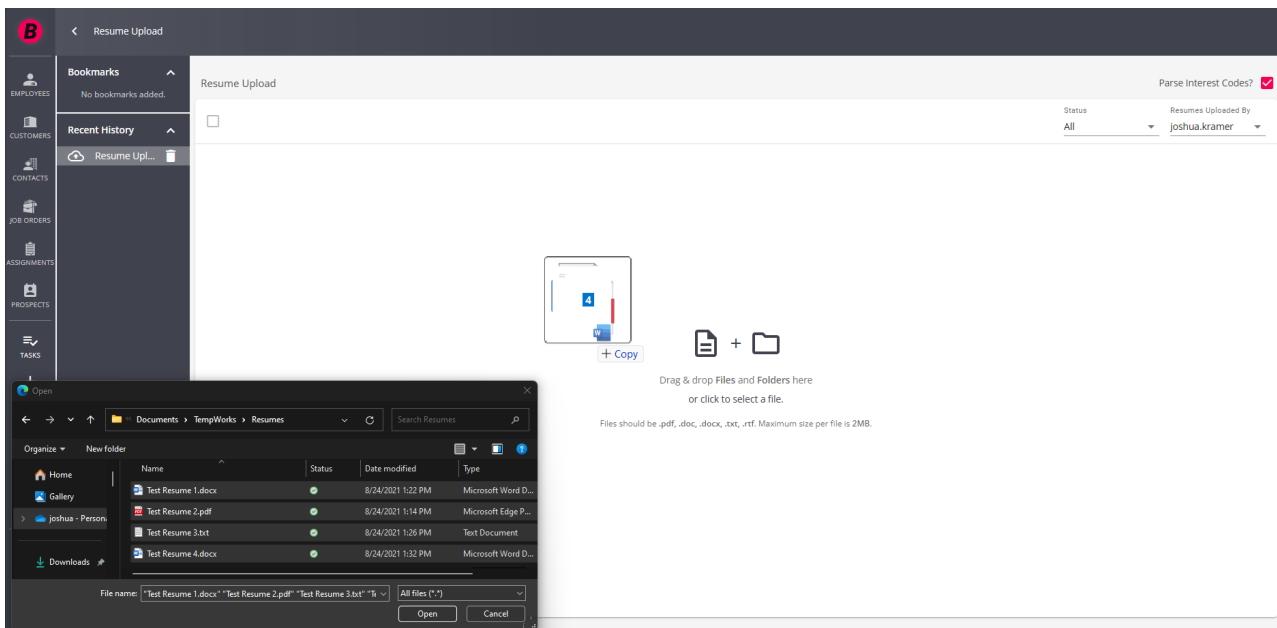

Add Files Method

This method is made available once you have resumes uploaded within the 'Resume Upload' window.

> *Note* It is not recommended to attempt to upload a folder of resumes using this method. When uploading a folder of resumes, it is recommended to use the Drag and Drop method.

To upload a resume using this method, select the 'Add Files' button at the top right. This will open a File Explorer window where you can navigate to your file destination and upload from there into the 'Resume Upload' window:
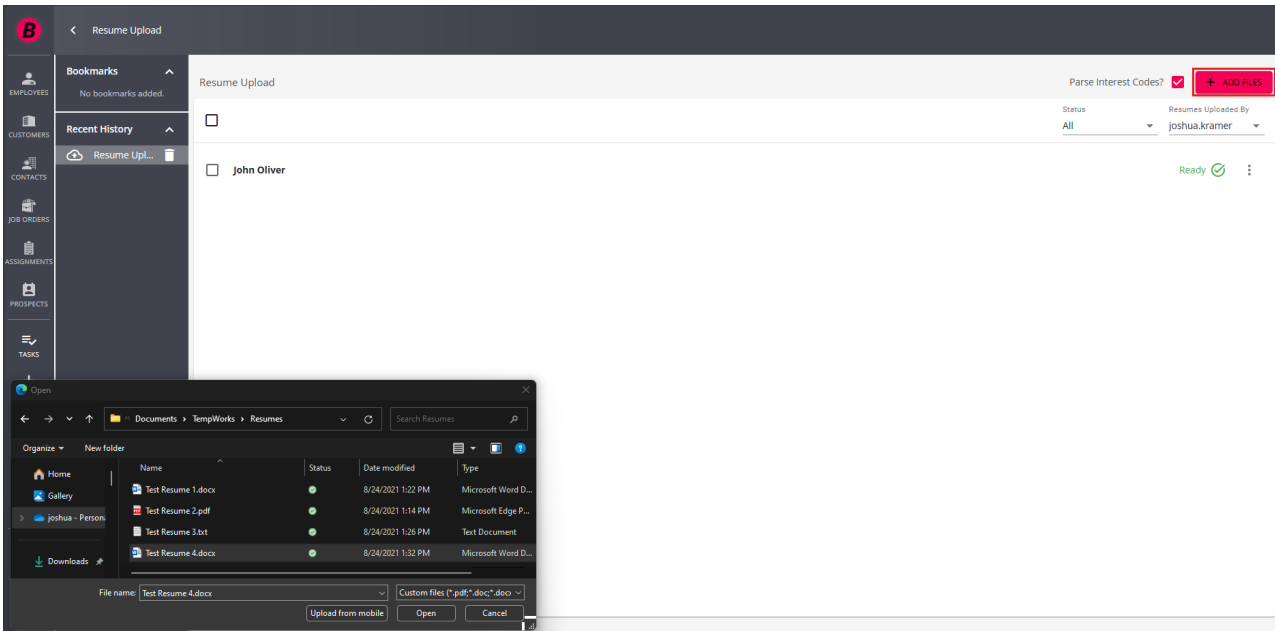
Resume Upload Duplicate Checking

Once resumes have been uploaded within Beyond, duplicate records are identified via two methods, resumes within the Upload Resume screen, and potential duplicate employees within your system.

> *Note* Duplicate checking does not take into account the event where multiple users are uploading the same resumes, at the same time.

Identifying Duplicate Resumes

When uploading resumes in bulk, either being a multi-select or by folder, there is a possibility that the same resume is attempted to be uploaded more than once within the "Resume Upload" screen.

> *Note* When uploading resumes in bulk, either by multi-select or by folder, there is a possibility that the same person might already exist as an employee within your system.
>
> To identify the potential duplicates, the following is done:
>
> 1. We first match on the employee's **first and last name**.
>   - The first and last name must match exactly with the name on the employee record.
> 2. Next, we check that the **Email Address** of the resume being uploaded exists amongst the same group matched by first and last name. If a match is found, the resume (staged employee) is considered a duplicate.
> 3. Lastly, we check that the **Street Address**, and the **Zip Code** of the resume being uploaded exists amongst the very same collection of employees that were found within the first step. If a match is present, the
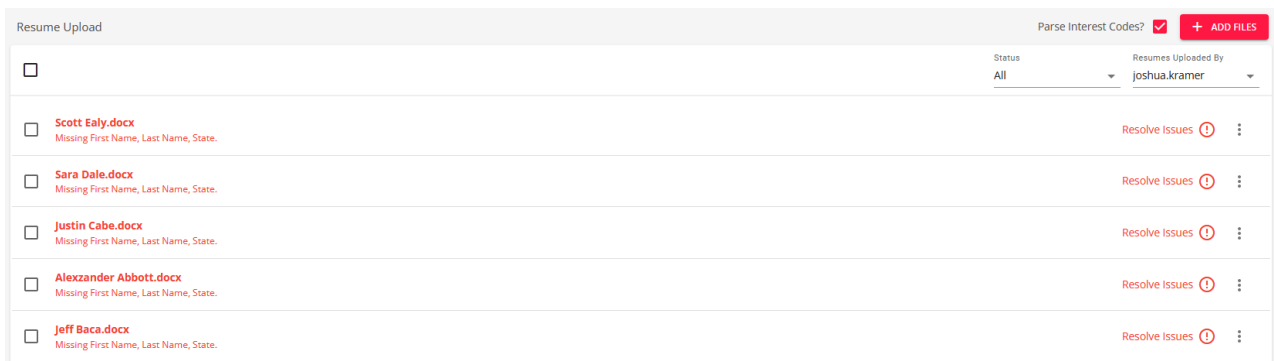
For example, 5 resumes are uploaded within Beyond.

Those same resumes are then attempted to be uploaded once more; this time located within a folder with additional resumes:

A validation message will appear at the top of the "Resume Upload" screen, showing the number of resumes within your current instance that were not uploaded due to being duplicates, along with a link to the others if there are more than 5 duplicates found:

Identifying Duplicate Employees

When uploading resumes in bulk, either being a multi-select or by folder, there is a possibility that the information within the resume matches information present within an existing Employee record within your system. If this happens, Beyond flags the resume within the "Upload Resumes" screen to show that it might be a duplicate record.

For example, a resume for Abbigail Jones is uploaded into Beyond and an Employee record is created for Abbigail based off the resume information:

Later on, a new resume for Abbigail Jones has been uploaded into Beyond and the Staged Employee record is flagged as being a potential duplicate based on the information provided within the newly uploaded resume:

Note When uploading resumes in bulk, either by multi-select or by folder, there is a possibility that the same person might already exist as an employee within your system.

To identify the potential duplicates, the following is done:

1. We first match on the employee's **first and last name**.

- The first and last name must match exactly with the name on the employee record.
2. Next, we check that the **Email Address** of the resume being uploaded exists amongst the same group matched by first and last name. If a match is found, the resume (staged employee) is considered a duplicate.
3. Lastly, we check that the **Street Address**, and the **Zip Code** of the resume being uploaded exists amongst the very same collection of employees that were found within the first step. If a match is present, the resume (staged employee) is considered a duplicate.

Note For points 2 and 3 above, the duplicate will be flagged only once the Email Address and Street Address match exactly with the corresponding information on the employee record.

Note TempWorks supports address standardization throughout Beyond, but in the instance of resume upload, the address is **not** standardized during the upload process:

- If a resume or an employee was previously added to the system and was standardized, but the resume, at the time of upload, is not standardized, the system will not recognize it as a duplicate on address.
- Some common issues tend to be that the last 4 digits of the zip code are missing on the resume, or that the standardization added/removed special characters. Both scenarios in this case would result in no duplicates found.

Note Even if Beyond flags a record as being a potential duplicate, you will still have the option to create an Employee record from the resume, delete the Staged Employee record, or merge the Staged Employee record with the existing Employee record. Instructions for these items can be found later within this article.

Resolving Resume Issues and Editing Resume Information

Once you have uploaded your resume(s), they will appear within the 'Resume Upload' window along with a status as to whether they were successful or if issues need to be resolved:

Note In order for a resume to be considered 'Ready' for an employee to be created, it must contain a First Name, Last Name, and State.

For resumes that have issues that need to be resolved, select one of the resumes via the checkbox on the left, select the ⋮ icon on the right of the resume, and select 'Edit Result':

Within the 'Edit Result' window, you will see a preview of the resume that has been uploaded and you will have the ability to update the following information:

- **Details**: First Name, Middle Name, Last Name, Street 1, Street 2, City, State, Zip Code, Country
- **Contact Information**: Method Type, Contact Information
    - In the event the resume parser finds a phone number for the employee, this will be listed as a Cell Phone at default.
- **Education**: Institution, Date Started, Date Ended, Degree Type, GPA, Other Information
- **Interest Codes**: Interest Code, Years of Experience
- **Work History**: Job Title, Employer, Supervisor, Phone Number, Date Started, Date Ended, Pay, Street 1, Street 2, City, State, Postal Code, Reason for Leaving, Duties, and checkboxes for Full Time, Part Time, Temporary, and Permission to Contact

Note You can click and drag information from the resume preview into the respective field within the 'Edit Results' window.

Enter the information you would like added along with the required fields that had missing information (First Name, Last Name, and/or State) and select 'Save' to update your changes:

Test

| Details | First Name
John | Middle Name | Last Name
Wayne |
Contact Information			
Education	Street		Street 2
Interest Codes			
Work History	City	State
Minnesota	Zip Code
Review Issues	Country		

RESET **SAVE**

Note When adding information within each section (Details, Contact Information, Education, Interest Codes, and Work History), these sections will need to be saved individually before being able to move on:

| Details | * Method Type
Cell Phone | * Phone Format
U.S. +1 | * Phone Number
1 (234) 567-890 |
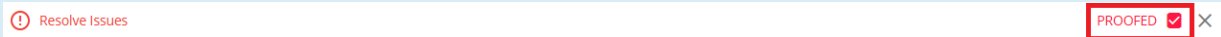| Contact Information | | | |
Education			
Interest Codes			
Work History			CANCEL **SAVE**
Review Issues			

In the event you do not save your changes within one section before moving to another section, those unsaved changes will be removed.

Once the updates to the resume have been saved, select the 'X' at the top right of the window to return to the Upload Resumes window. You will see that as long as all issues have been resolved, the resume will have a 'Ready' status with a green checkmark, signifying that an employee is able to be created from the resume:

This process can be completed for all other resumes that have issues to be resolved.

Creating Employees from Uploaded Resumes

Once the status of the resume(s) show 'Ready' with the green checkmark, an employee is able to be created. This can be done via two methods.

Creating Employees Individually

Select one of the resumes with the 'Ready' or 'Proofed' (with all issues resolved) status via the checkbox on the left, select the ⋮ icon on the right of the resume, and select 'Create Employee':

Within the 'Create Employee' window, you will have the following options to review and update as necessary:

- Job Order Type
- Branch
- Category
- Hire Status
- Washed Status
- How Heard Of
- How Heard Of Detail

Additionally, you can add a message to post to the employee file upon creation by using the Message Action and Log Message fields.

Create Employee

Review employee default settings and update if necessary.

Job Order Type	Branch
Temp	High Tech NW

Category	Hire Status
All	

How Heard Of	Washed Status
	Unfamiliar

How Heard of Detail

Message

Message Action

Log Message

☑ Employee Active

CANCEL   CREATE EMPLOYEE

Add/update the information, check the box for whether the employee should be active upon creation, and select 'Create Employee' at the bottom right of the window for the employee file to be created:

Once the employee has been created successfully from the resume, that employees resume will be removed from the 'Resume Upload' window.

This process can be completed for all other resumes that are to have employees created from them individually.

Creating Employees In Bulk

Select multiple resumes with the 'Ready' or 'Proofed' (with all issues resolved) status via the checkbox on the left, select the ⌄ icon, and select 'Create Employees':

Within the 'Create Employees' window, you will have the following options to review and update as necessary:

- Job Order Type
- Branch
- Category
- Hire Status
- Washed Status
- How Heard Of
- How Heard Of Detail

Additionally, you can add a message to post to the employee files upon creation by using the Message Action and Log Message fields.

Create Employees

Review employee default settings and update if necessary.

Job Order Type

Temp

Branch

High Tech NW

Category

All

Hire Status

How Heard Of

Washed Status

Unfamiliar

How Heard of Detail

Message

Message Action

Log Message

☑ Employee Active

CANCEL   **CREATE EMPLOYEES**

Add/update the information, check the box for whether the employees should be active upon creation, and select 'Create Employees' at the bottom right of the window for the employee files to be created:

Once the employees have been created successfully from the resumes, the employee resumes will be removed from the 'Resume Upload' window.

Merging Employees from Uploaded Resumes

Staged Employee records that are flagged as potential duplicates from uploading resumes in Beyond are able to be merged into the respective existing Employee record.

Begin by selecting the record that has been flagged as a duplicate:

Select either the ⟨icon⟩ icon or the ⟨icon⟩ icon and select "Merge Resume". This will open the "Merge Record" window:

Within the "Merge Record" window, you will see the Staged Employee information on the left and the existing Employee information on the right.

Select the ⟨icon⟩ icon to bring over the information to be updated from the Staged Employee to the existing Employee record:

Merge Record

1 Profile Information ——————————————— **2** Merge Options

Verify information. Changes that you make will be applied after the merge is complete.

This record will be deleted	This record will be updated

Employee Id: **4295038470**

First Name
Abbigail

Last Name
Jones

First Name
Abbigail

Last Name
Jones

Street
16th Ave S

Street
16Th Ave S

Street 2

Street 2

City
Green Bay

City
Green Bay

State
Wisconsin

Zip Code
54229

State
Wisconsin

Zip Code
54229

Branch
High Tech NE

Hire Status
Eligible for Hire

CANCEL   NEXT >

Once the information has been transferred within the "Merge Record" window, select "Next" to continue with the merging process:

> *Note* The existing Employee record will be updated with the information chosen to be brought over from the Staged Employee record. The Staged Employee record will then be deleted once the merge has been completed.

On the final step of the merge, you will have the option to include Education, Work History, Interest Codes, and Contact Methods from the uploaded resume to be added to the existing Employee record:

Merge Record

✓ **Profile Information** ——————————————————— ② **Merge Options**

Select items you want to include in the merge. If checked, they will be added to the primary record (**Abbigail Jones**).

☐ Education

☐ Work History

☐ Interest Codes

☑ **Contact Methods**
  Duplicate contact methods will be logged as a message for manual review

CANCEL   < PREVIOUS   MERGE

Note Boxes within this window will only be able to be selected/deselected if relative information exists within the uploaded resume.

Once all of the information has been verified, select "Merge" to complete the merging of the Staged Employee information to the existing Employee record.

Deleting Staged Resumes

Staged resumes are able to be deleted at any time via two methods.

Note Staged resumes can be deleted regardless of status.

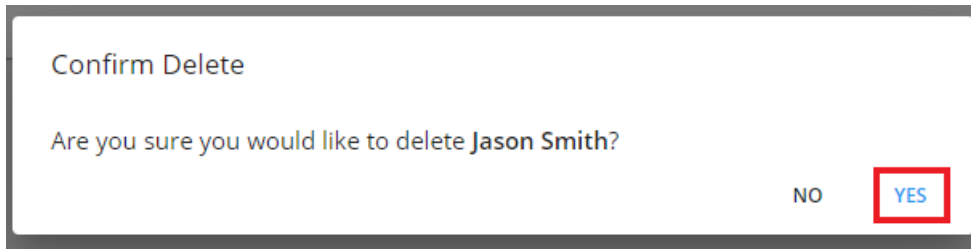
Deleting Staged Resumes Individually

Select one of the resumes via the checkbox on the left, select the ⋮ icon on the right of the resume, and select 'Delete':

Resume Upload   Parse Interest Codes? ☑ **+ ADD FILES**

☑ ⌄   Resumes Uploaded By
                                                            joshua.kramer ▾

☑ **Jason Smith**   Resolve Issues ⓘ ⋮
    Missing State.
                                                         Edit Result
☐ **Jeff Goldblum**   Create Employee

☐ **John Oliver**   **Delete**

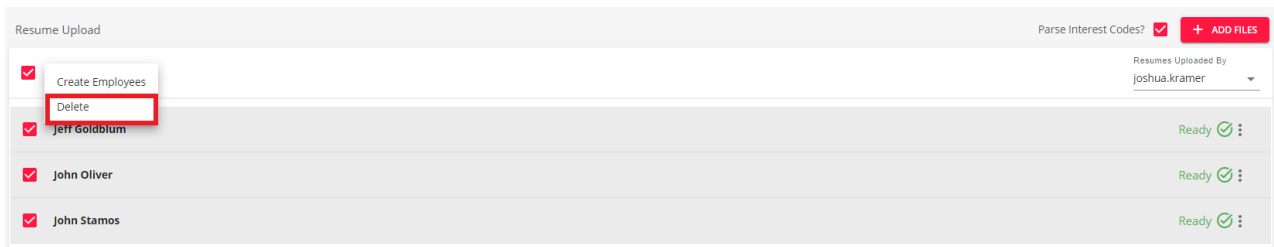☐ **John Stamos**   Ready ✓ ⋮

You will receive a prompt to confirm the deletion of the staged resume. Select 'Yes' to confirm or 'No' to return to the 'Resume Upload' window:
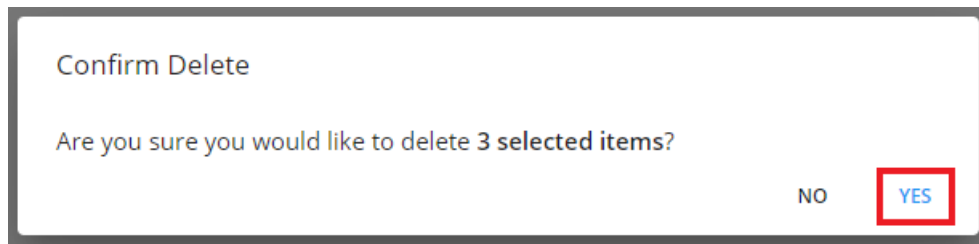
Once the resume has been deleted, the resume will no longer appear within the 'Resume Upload' window.

Deleting Staged Resumes In Bulk

Select multiple resumes via the checkbox on the left, select the ⌄ icon, and select 'Delete':

You will receive a prompt to confirm the deletion of the staged resumes. Select 'Yes' to confirm or 'No' to return to the 'Resume Upload' window:

Once the resumes have been deleted, the resumes will no longer appear within the 'Resume Upload' window.

Related Articles