

Beyond - Interview Questionnaire

Last Modified on 09/26/2024 10:56 am CDT

Overview

Within Beyond™, users have the ability to conduct employee interviews with questions that have been tailored to your needs.

Note Please note the following regarding Interview Questionnaire backwards compatibility between Enterprise and Beyond:

- All interviews added in Enterprise will appear in Beyond.
- A user is unable to add a questionnaire of the same category multiple times when adding new interviews in Enterprise.
- A user can add questionnaires of the same category multiple times when adding new interviews in Beyond where Enterprise will show only the latest version if multiple interviews of the same category exist in Beyond.

Note At this time, the interview groups and questions must first be set up within Enterprise by your admin.

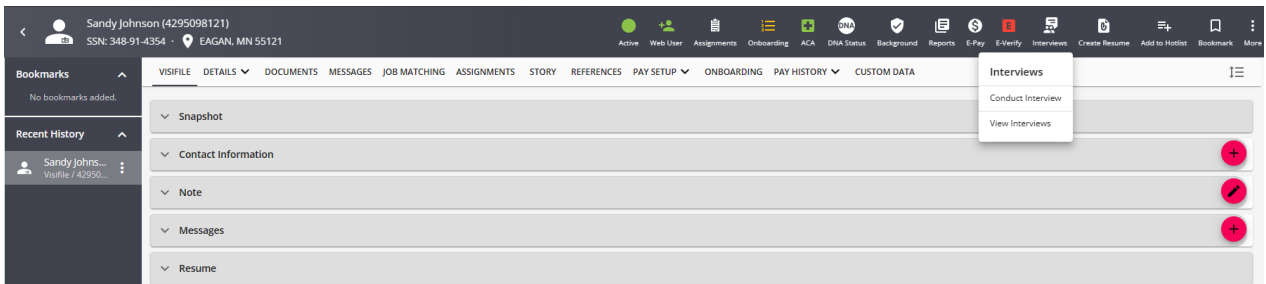
For more information, please see the following article: [Enterprise - Setting Up the Interview Questionnaire](#).

This article contains the following:

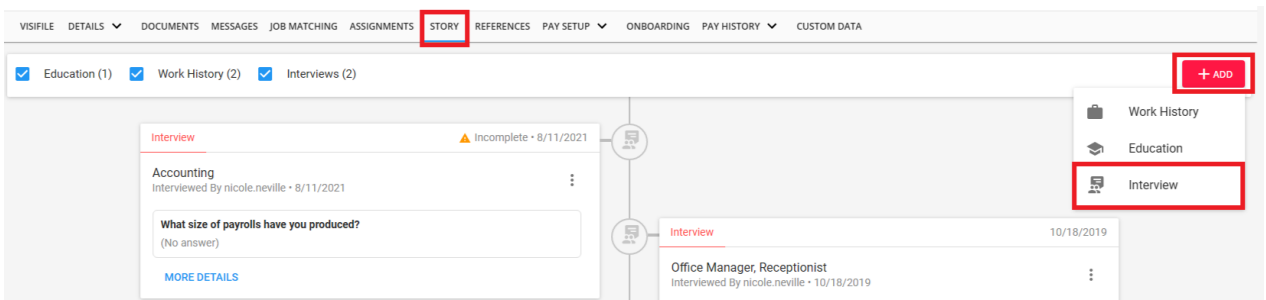
- [Creating an Employee Interview](#)
- [Completing an Employee Interview](#)
- [Viewing Employee Interviews](#)
- [Utilizing the Employee Interviews Report](#)
- [Editing Employee Interviews](#)
- [Deleting Employee Interviews](#)
- [Searching Employee Interviews](#)

Creating an Employee Interview

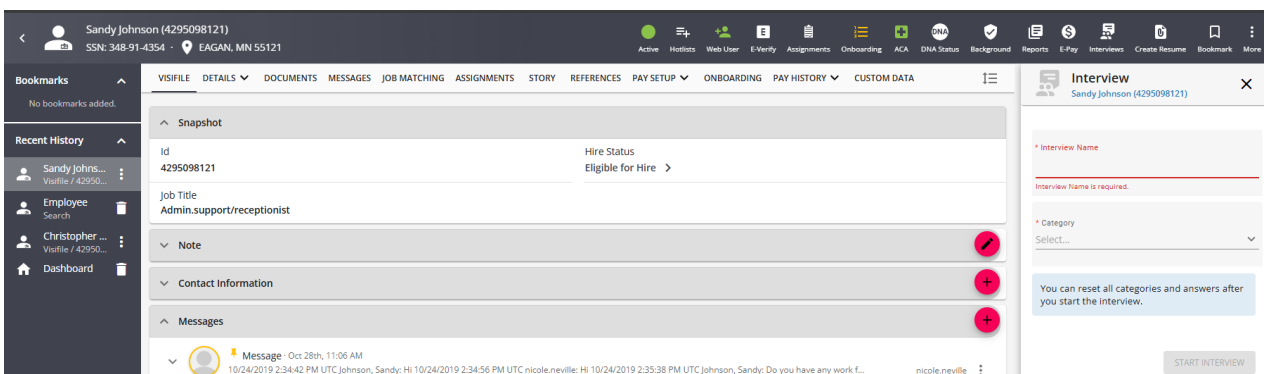
There are two methods to conduct an interview with an employee in Beyond. These methods include the Interviews Charm on the employee's Visifile by selecting the "Interviews" Charm, and selecting "Conduct Interview":



Or within the Employee's Story by selecting the "Story" tab, selecting the "+ Add" button, and selecting "Interview":



Once you have chosen your preferred method, the "Interview" sidebar will appear:

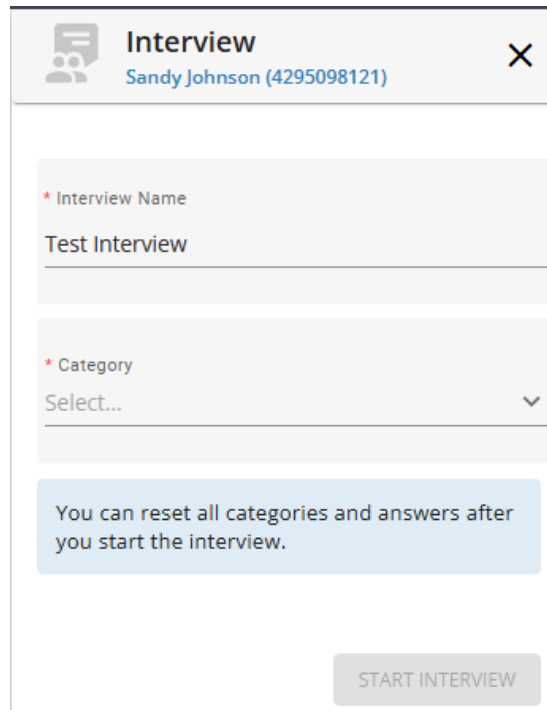


Note The Interview Sidebar will remain open even when navigating away from the Employee file.

To dismiss the Interview Sidebar, select the "X" at the top right corner of the Sidebar.

Within the Interview Sidebar, do the following:

- Enter a name for the interview.
- Select the Category (or multiple) of questions you would like to be presented to the employee for the interview.



The screenshot shows the 'Interview' sidebar for 'Sandy Johnson (4295098121)'. It features a header with a close button (X) and a sidebar icon. Below the header, there are two input fields: 'Interview Name' with the value 'Test Interview' and 'Category' with a dropdown menu set to 'Select..'. A blue informational box states: 'You can reset all categories and answers after you start the interview.' At the bottom, there is a 'START INTERVIEW' button.

Note The question Categories in Beyond relate to the question Groups that will need to be created in Enterprise beforehand.

For more information on this process, please see the following article: [Enterprise - Setting Up the Interview Questionnaire](#).

Note You are able to select more than one question Category for the employee to complete within the interview. By selecting one Category, it will be shown within the list:

Interview ×
Sandy Johnson (4295098121)

Set up questions

Category

Accounts Receivable/Accounts Payable × × ▾

You can reset all categories and answers after you start the interview.

[CANCEL](#) [START INTERVIEW](#)

Select the Category dropdown again to add another:

Interview ×
Sandy Johnson (4295098121)

Set up questions

Category

Accounts Receivable/Accounts Payable × × ▾

Achievements × | _____


You can reset all categories and answers after you start the interview.

[CANCEL](#) [START INTERVIEW](#)

Repeat the process until all required question Categories have been selected and are seen within the list.

To remove a question Category before the interview has begun, select the "X" to the right of the Category within the list.

Once all of the required question Categories have been chosen, select the "Start Interview" button:

 **Interview** ×
Sandy Johnson (4295098121)

Set up questions

Category

Accounts Receivable/Accounts Payable ×

Achievements × × ▼

Behavioral Questions × |

You can reset all categories and answers after you start the interview.

CANCEL

START INTERVIEW

[Back To Top](#)

Completing an Employee Interview

Once the interview has started, enter the answers to the questions presented:

Accounts Receivable/Accounts Paya...

Interviewed by joshua.kramer

ACCOUNTS RECEIVABLE/ACCOUNTS PAYABLE

Software Programs ^

What accounting software programs do you have experience with? How proficient are you with that/these programs?

Type answer

NEXT

Experience Level v

Disputes v

Collections v

Training v

Which part is your favorite v

Note When navigating through the list of questions, the following helpful points should be taken into consideration:

- Depending on the Category selected, questions may have Required answers. These answers must be entered before being able to save or exit the Employee interview:

*** Your word** ^

Which word best describes you?

select... v

NEXT

- Once an answer is entered for a question, the answer will autosave with a green checkmark to prevent a loss of information:

Software Experience

Tell me about word processing, spreadsheet, and database management programs that you have experience with, explaining which one you like the best, and which ones you have had problems with, and why.

This is a test|

985

NEXT

- Answers to questions have a character limit of 1000, and once the limit has been reached for an answer, you will simply not be able to add any more characters within the field:

Software Experience

Tell me about word processing, spreadsheet, and database management programs that you have experience with, explaining which one you like the best, and which ones you have had problems with, and why.


This is a test.

985

NEXT

- Once an answer has been entered for a question, you can navigate to the next question quickly within the list by either clicking the "Tab" key on your keyboard, or selecting "Next" within the UI.

Note In the event the incorrect Categories were chosen when creating the interview, you can select the option to "Reset" the interview:

 **Interview** ×
Sandy Johnson (4295098121)

Accounts Receivable/Accounts Paya...
Interviewed by joshua.kramer
ACCOUNTS RECEIVABLE/ACCOUNTS PAYABLE

Software Programs ✓

What accounting software programs do you have experience with? How proficient are you with that/these programs?

This is a test.

985 NEXT

Experience Level ▼

Disputes ▼

Collections ▼

Training ▼

Which part is your favorite ▼

BEHAVIORAL QUESTIONS

Favorite ▼

RESET COMPLETE

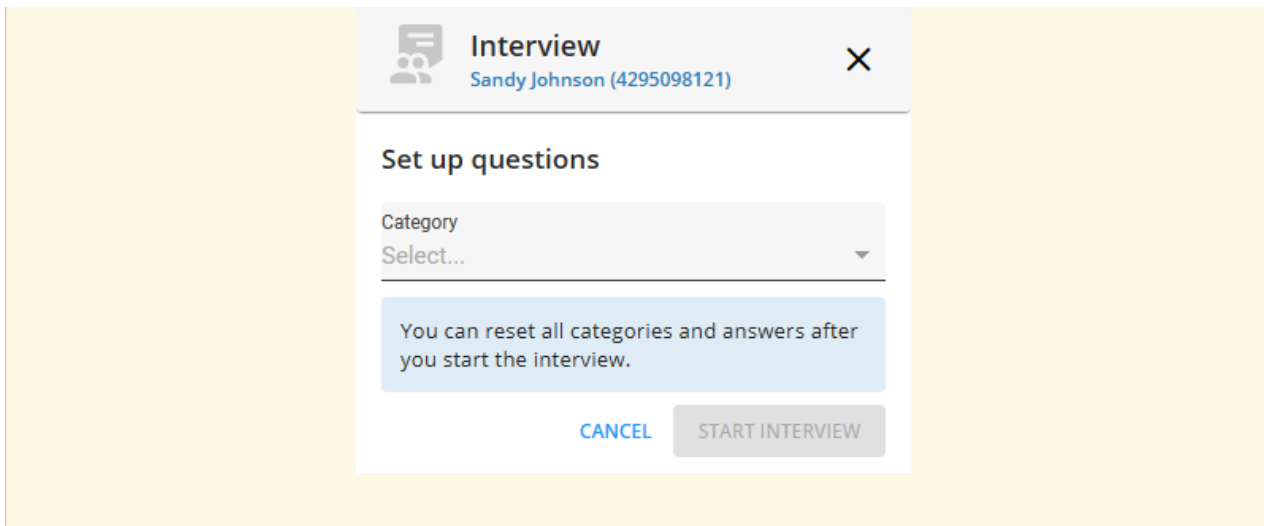
By selecting this option, you will receive a prompt asking if this is what you would like to do:

Confirm Reset

All categories and answers will be lost on this interview. Are you sure you want to continue?

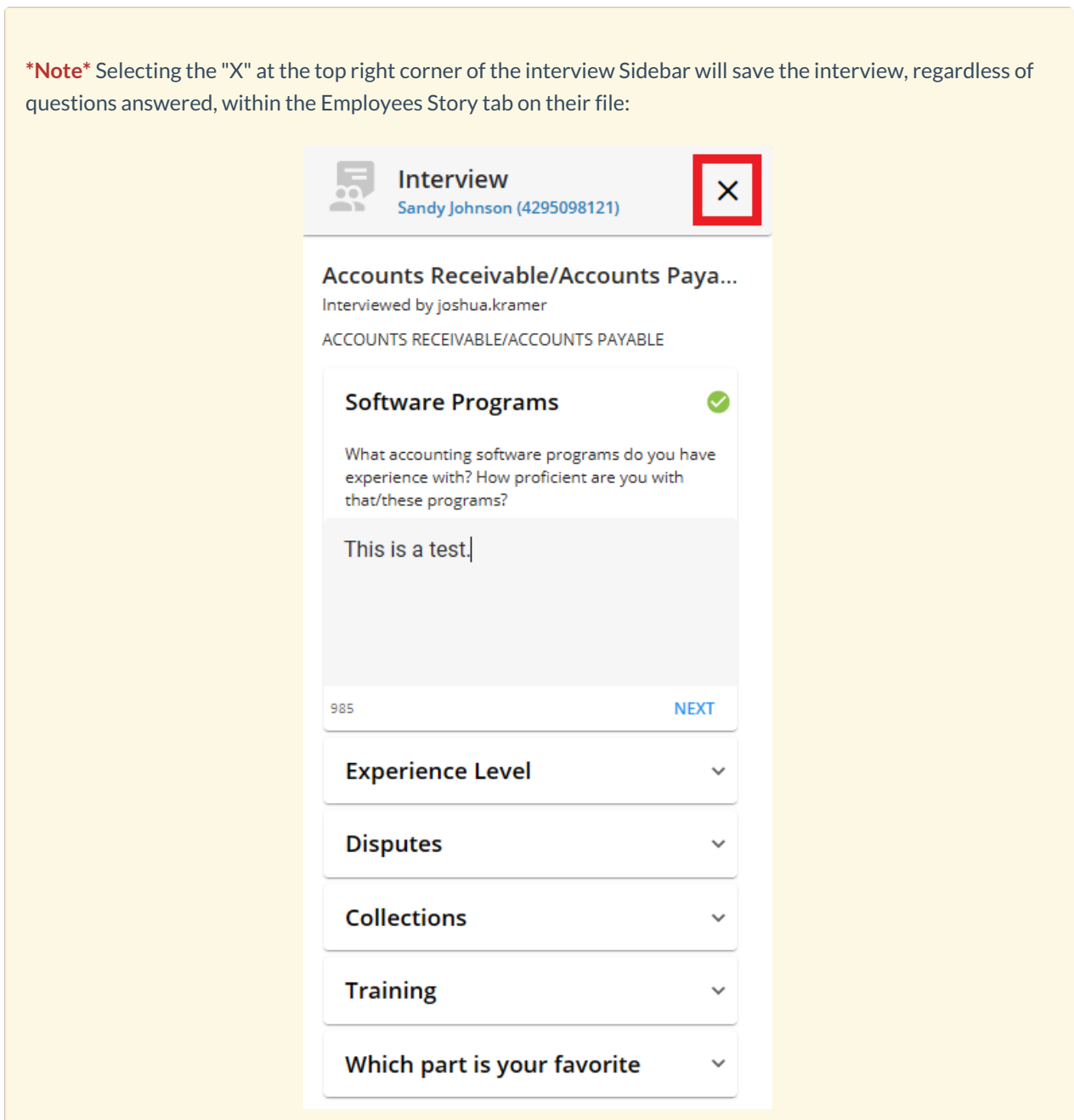
CANCEL CONTINUE AND RESET ALL

Upon selecting "Continue And Reset All", this will reset all Categories and questions of the interview, navigating you back to the creation window of the Sidebar:



Continue entering answers for all of the questions presented until the interview has been completed.

Note Selecting the "X" at the top right corner of the interview Sidebar will save the interview, regardless of questions answered, within the Employees Story tab on their file:




In the event there are unanswered Required questions, you will be prompted to completed them before being able to navigate away from the interview:

Missing required Information

All required questions must be answered before exiting the interview.

KEEP WORKING

Once all of the questions within the interview have been answered, select "Complete" to finish and save the interview:

 **Interview** ×
Sandy Johnson (4295098121)

Accounts Receivable/Accounts Paya...
Interviewed by joshua.kramer
ACCOUNTS RECEIVABLE/ACCOUNTS PAYABLE

- Software Programs ✓
- Experience Level ✓
- Disputes ✓
- Collections ✓
- Training ✓
- Which part is your favorite ✓

BEHAVIORAL QUESTIONS

- Favorite ✓
- * Your word ✓

RESET

COMPLETE

The interview will be saved under the Employee's Story tab on their file.

Once an Employee interview is completed, the "Interviewed By" field on the Employee Details page will be updated as well:

The screenshot shows the 'Employee Details' page for a hire. The 'Interviewed By' field is highlighted with a red box and contains the text 'joshua.kramer on 9/20/2021'. Other fields include 'Washed Status: Familiar', 'Job Order Type: Direct Hire', 'Job Title: Admin.support/receptionist', 'Orientation Date: --', 'Activation Date: --', 'Entered By: nicole.neville', and 'Numeric Rating: 0'. The 'Hire Status' is 'Eligible for Hire' and the 'Staffing Specialist' is 'nicole.neville'.

[Back To Top](#)

Viewing Employee Interviews

Employee interviews are able to be viewed by navigating to the Employee record > Story:

The screenshot shows the 'Employee Story' page with a timeline of interviews. The 'Interviews (3)' filter is selected. The timeline shows three interviews in descending order of completion date: 1) 'Accounting' (8/11/2021, Incomplete), interviewed by nicole.neville, with the question 'What size of payrolls have you produced?'; 2) 'Office Manager, Receptionist' (10/18/2019), interviewed by nicole.neville, with the question 'For what specific duties as an Office Manager have you been responsible?'; and 3) 'Behavioral Questions, Accounts Receivable/Accounts Payable' (9/20/2021), interviewed and modified by joshua.kramer, with the question 'Describe your favorite job in the past 5 years?'. A '+ ADD' button is visible in the top right corner.

Interviews will be shown via a timeline format in descending order by the date the interview had been completed:

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS **STORY** REFERENCES PAY SETUP ONBOARDING PAY HISTORY CUSTOM DATA

Education (1) Work History (2) Interviews (3) + ADD

Interview ▲ Incomplete - 8/11/2021

Accounting
Interviewed By nicole.neville • 8/11/2021

What size of payrolls have you produced?
(No answer)

[MORE DETAILS](#)

Interview 10/18/2019

Office Manager, Receptionist
Interviewed By nicole.neville • 10/18/2019

OFFICE MANAGER

For what specific duties as an Office Manager have you been responsible?
Answering phones, scheduling meetings, greeting guests, ordering supplies.

Interview 9/20/2021

Behavioral Questions, Accounts Receivable/Accounts Payable
Interviewed By joshua.kramer • 9/20/2021
Modified By joshua.kramer • 9/20/2021

BEHAVIORAL QUESTIONS

Describe your favorite job in the past 5 years?
(No answer)

[MORE DETAILS](#)

Note Incomplete interviews that have been saved to the Employee Story are always sent to the top of the timeline:

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS **STORY** REFERENCES PAY SETUP ONBOARDING PAY HISTORY CUSTOM DATA

Education (1) Work History (2) Interviews (3) + ADD

Interview ▲ Incomplete - 8/11/2021

Accounting
Interviewed By nicole.neville • 8/11/2021

What size of payrolls have you produced?
(No answer)

[MORE DETAILS](#)

Interview 10/18/2019

Office Manager, Receptionist
Interviewed By nicole.neville • 10/18/2019

OFFICE MANAGER

For what specific duties as an Office Manager have you been responsible?
Answering phones, scheduling meetings, greeting guests, ordering supplies.

Interview 9/20/2021

Behavioral Questions, Accounts Receivable/Accounts Payable
Interviewed By joshua.kramer • 9/20/2021
Modified By joshua.kramer • 9/20/2021

BEHAVIORAL QUESTIONS

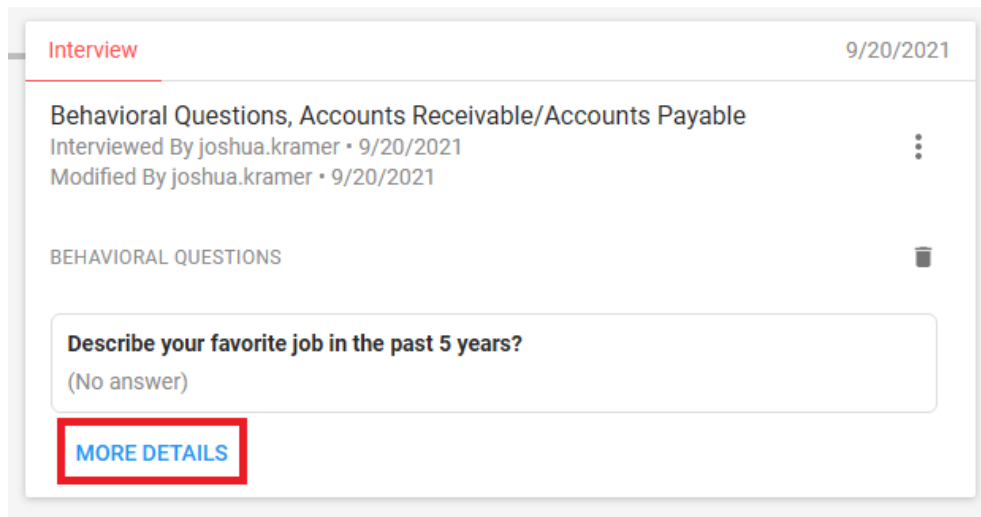
Describe your favorite job in the past 5 years?
(No answer)

[MORE DETAILS](#)

An interview will only show as "Incomplete" in the event the interview wasn't saved and/or completed. This includes a power outage or system shut down.

Once an incomplete interview has been completed, it will enter the timeline based off the date of completion.

To view an entire interview, select the "More Details" option within the interview card:




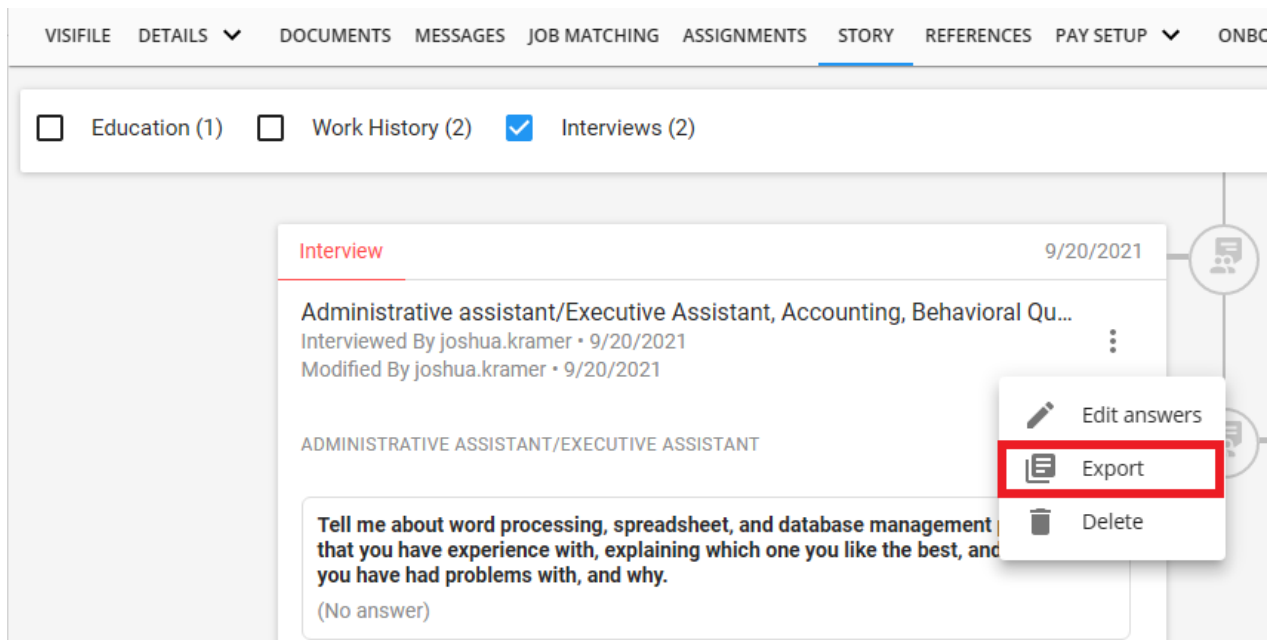
In the event more than one interview for an Employee has been completed in the same day, they will all appear within one timeline entry on the Employees Story.

[Back To Top](#)

Utilizing the Employee Interviews Report

You have the ability to export Employee interview results by means of the Employee Interview Report within Beyond.

To begin, navigate to the Employee record > Story > the  icon of the Interview card > Export:




This will open the Employee Interview Report for that employee record:

Aident®
4295098121

PAGE 1 OF 2

VIEW REPORT

Employee Interview Report
High Tech Staffing
Interview questions/answers

Entity Level (Held 2) 

Sandy Johnson - 4295098121

Question Name	Question Text	Date	Interviewer
Group Name: Accounting			
Payroll Size	What size of payrolls have you produced?	9/20/2021	joshua.kramer
Test			
Software Programs	What accounting software programs do you have experience with?	9/20/2021	joshua.kramer
Test			
General Ledger	Tell me about your experience and skill level with general ledger accounting.	9/20/2021	joshua.kramer
Test			
Experience 1	What experience do you have with accounts payable? Accounts receivable? Payroll? How many years?	9/20/2021	joshua.kramer
1-2 years			
Favorite	What has been your favorite position?	9/20/2021	joshua.kramer
Test			
Accounting Reports	Have you created accounting reports? If yes, describe them.	9/20/2021	joshua.kramer
Test			
Accounting Coursework	What college accounting coursework have you completed?	9/20/2021	joshua.kramer
Test			
Words Per Minute	What is your words per minute?	9/20/2021	joshua.kramer
Test			
Group Name: Accounts Receivable/Accounts Payable			
Software Programs	What accounting software programs do you have experience with? How proficient are you with that/these programs?	9/20/2021	joshua.kramer
This is a test.			
Experience Level	What experience do you have with accounts payable? Accounts receivable? Payroll? How many years?	9/20/2021	joshua.kramer
This is a test.			
Disputes	Have you ever handled an invoice dispute?	9/20/2021	joshua.kramer
This is a test.			

Note At this time, the Employee Interviews report will generate all interviews for the entered Aident (Employee ID) and not just the single interview chosen within the Employees Story.

This report will show you the following information:

- **Question Name:** The title of the question being asked to the employee.
- **Group Name:** The Group or Category the question is within.
- **Question Text:** The question being asked to the employee.
- **Date:** The date the interview was completed.
- **Interviewer:** The Service Rep who conducted the interview.
- **Answer:** The answer to the question being asked.


Once the report has been generated, you have the option to Print and/or Download the report via the options to the top right:

Aident®
4295098121

PAGE 1 OF 2

VIEW REPORT

Employee Interview Report
High Tech Staffing
Interview questions/answers

Entity Level (Held 2) 


Sandy Johnson - 4295098121

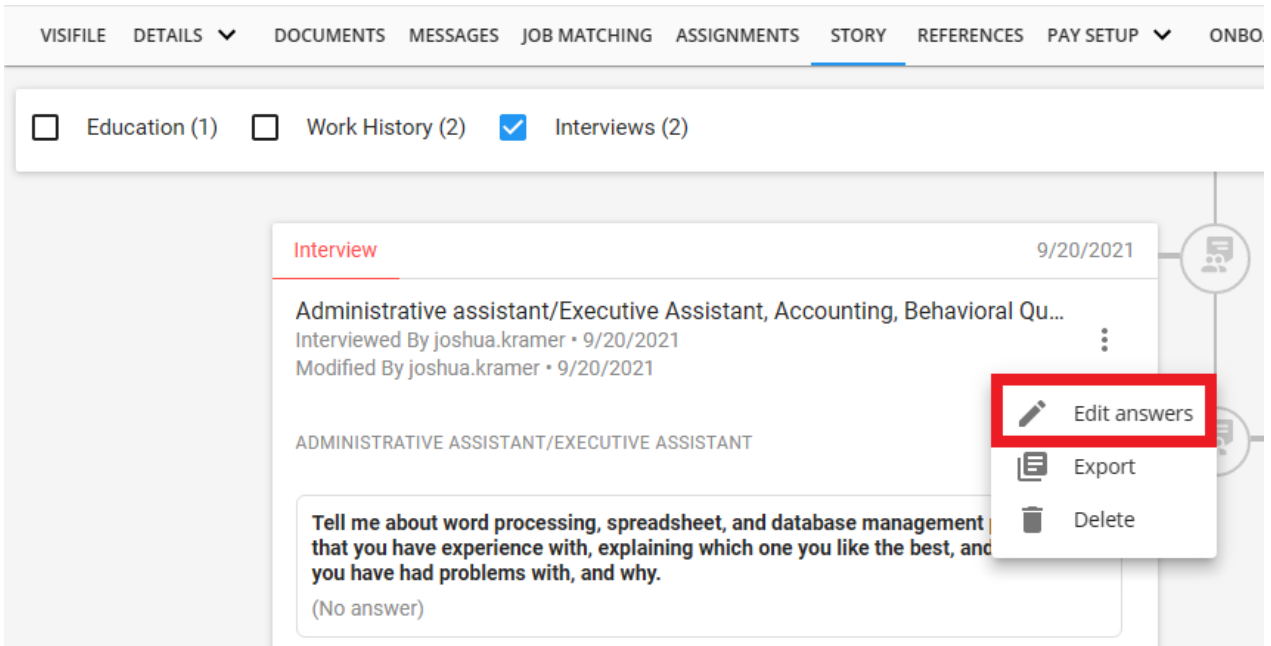
Question Name	Question Text	Date	Interviewer
Group Name: Accounting			
Payroll Size	What size of payrolls have you produced?	9/20/2021	joshua.kramer
Test			
Software Programs	What accounting software programs do you have experience with?	9/20/2021	joshua.kramer
Test			

This report is also accessible by navigating to the B Menu > Reports > Employee Interview Report.

[Back To Top](#)

Editing Employee Interviews

To edit the answers to an Employees interview questions, navigate to the Employee record > Story > the  icon of the Interview card > "Edit answers":



This will open the Interview Sidebar for the interview selected:

Administrative assistant/Executive A...

Interviewed by joshua.kramer

ADMINISTRATIVE ASSISTANT/EXECUTIVE ASSISTANT

Software Experience ^

Tell me about word processing, spreadsheet, and database management programs that you have experience with, explaining which one you like the best, and which ones you have had problems with, and why.

Type answer

[NEXT](#)

Proofreading v


Scheduling v

Business Letters v

Organization v

Continue to update the answers to the intended questions within the interview until complete.

Once complete, select "Save" for the changes to reflect on the interview:

 **Interview** ✕
Sandy Johnson (4295098121)

Administrative assistant/Executive A...

Interviewed by joshua.kramer

ADMINISTRATIVE ASSISTANT/EXECUTIVE ASSISTANT

- Software Experience** ✔
- Proofreading** ▼
- Scheduling** ▼
- Business Letters** ▼
- Organization** ▼
- Motivator** ▼

ACCOUNTING

- Payroll Size** ▼
- Software Programs** ▼
- General Ledger** ▼
- * Experience 1** ✔
- Favorite** ▼

SAVE

The Interview Sidebar will close and you will see the interview has a new "Modified By" entry on the interview record of the Employees Story:

VISIFILE DETAILS ▾ DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ▾ ONBO

Education (1) Work History (2) Interviews (2)

Interview 9/20/2021

Administrative assistant/Executive Assistant, Accounting, Behavioral Qu...

Interviewed By joshua.kramer • 9/20/2021

Modified By joshua.kramer • 9/20/2021

ADMINISTRATIVE ASSISTANT/EXECUTIVE ASSISTANT

Tell me about word processing, spreadsheet, and database management programs that you have experience with, explaining which one you like the best, and which ones you have had problems with, and why.

This is a test.

[MORE DETAILS](#)

[Back To Top](#)

Deleting Employee Interviews

When deleting interviews, you have the option to delete separate Categories of questions from an interview, or the interview in its entirety.

Both processes begin by navigating to the Employee record > Story > the Interview card.

Deleting a Category of Questions

To delete a single Category of questions from the Interview, select the Trash Can icon to the right of the Category name:

The screenshot shows an interview titled "Administrative assistant/Executive Assistant, Accounting, Behavioral Qu..." dated 9/20/2021. It lists the interviewer and modifier as Joshua Kramer. Below the title, the category "ADMINISTRATIVE ASSISTANT/EXECUTIVE ASSISTANT" is highlighted with a red box. To the right of this category is a trash can icon. Below the category are three question prompts, each followed by the text "This is a test.":

- Tell me about word processing, spreadsheet, and database management programs that you have experience with, explaining which one you like the best, and which ones you have had problems with, and why.**
- Please rate your proofreading ability. What are the top 3 things for which you usually look?**
- What experience do you have with maintaining a manager's work schedule? What would you consider prior to committing your manager to a meeting? How would you handle the situation if a salesperson came in to talk to your boss without an appointment?**

You will receive a prompt to confirm you want to delete this Category of questions (and answers) from the selected interview:

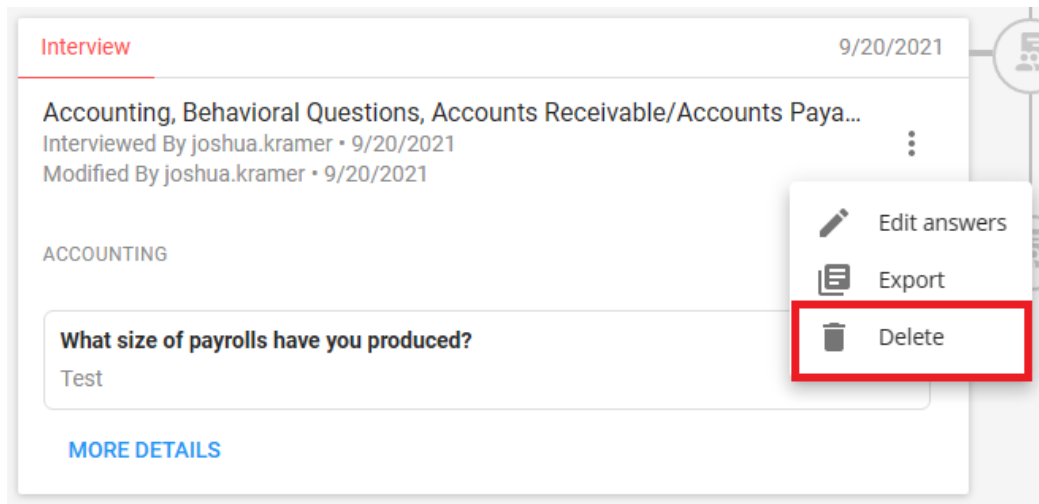
The dialog box is titled "Confirm Delete" and contains the following text: "Delete Administrative assistant/Executive Assistant interview? This action cannot be undone." At the bottom right, there are two buttons: "CANCEL" and "DELETE".

To confirm, select "Delete". The interview will have been updated within the Employees Story to reflect the deletion of the Category of questions (and answers).

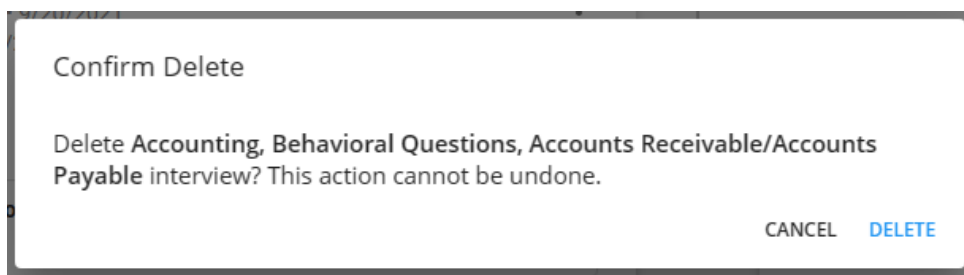
Note Once a Category of questions has been deleted from an interview, those questions (and answers) are gone forever. The same category is able to be re-added to the interview, but new answers will need to be provided.

Deleting an Entire Interview

To delete the entire interview, select the  icon to the right of the interview and select "Delete":



You will receive a prompt to confirm you want to delete the entire interview:



To confirm, select "Delete". The interview will be removed from the Employees Story.

Note Once an interview is deleted, it is gone forever.

[Back To Top](#)

Searching Employee Interviews

There are two sections within Beyond that allow for the searching of Employee interview information.

Interviews Search

Begin by navigating to the B Menu > Records > Interviews to navigate to the Interview Search:

Category	Question	Answer
Interview Name	Date	Status
Hire Status		Active
Eligible for Hire		

RESET SEARCH

The following search fields can be used within the Interview Questionnaire functionality:

- Category

- Question
- Answer
- Interview Name
- Date
- Status
- Hire Status

Enter information within the fields and select "Search" to see the results.

Note When completing an Interview search, the following helpful points should be taken into consideration:

- Selecting the "Reset" option within the search will revert the search fields to their default values.
- The Date filter can be set as either a range or an individual value.

With the search completed, you can expand the results by either selecting the dropdown to the left of the record, or by selecting the "Expand All" option:

Category: Accounting | Question: | Answer: | Date: 9/20/2021 - 9/20/2021 | Status: Active | Hire Status: Eligible for Hire

RESET SEARCH

Search returned 1 result Expand All

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Hire Status	Phone
<input checked="" type="checkbox"/>	4295098121	Johnson	Sandy	High Tech South East	✓	Eligible for Hire	6514705250

QUESTION	ANSWER	CATEGORY	DATE
What size of payrolls have you produced?	Test	Accounting	9/20/2021
What accounting software programs do you h...	Test	Accounting	9/20/2021
Tell me about your experience and skill level ...	Test	Accounting	9/20/2021
What experience do you have with accounts p...	1-2 years	Accounting	9/20/2021
What has been your favorite position?	Test	Accounting	9/20/2021

Selecting a question within the list will open the Interview Sidebar with the selected question highlighted so the information can be viewed:

Category: Accounting | Question: | Answer: | Date: 9/20/2021 - 9/20/2021 | Status: Active | Hire Status: Eligible for Hire

RESET SEARCH

Search returned 1 result Expand All

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Hire Status	Phone
<input checked="" type="checkbox"/>	4295098121	Johnson	Sandy	High Tech South East	✓	Eligible for Hire	6514705250

QUESTION	ANSWER	CATEGORY	DATE
What size of payrolls have you produced?	Test	Accounting	9/20/2021
What accounting software programs do you h...	Test	Accounting	9/20/2021
Tell me about your experience and skill level ...	Test	Accounting	9/20/2021
What experience do you have with accounts p...	1-2 years	Accounting	9/20/2021
What has been your favorite position?	Test	Accounting	9/20/2021

Interview ×

Sandy Johnson (4295098121)

Accounting, Behavioral Questions, ...

Modified By Joshua.Kramer - 9/20/2021

What size of payrolls have you produced?

Test

What accounting software programs do you have experience with?

Test

Tell me about your experience and skill level with general ledger accounting.

Test

What experience do you have with accounts payable? Accounts receivable? Payroll? How many years?

1-2 years

Note The information within this instance of the Interview Sidebar is not able to be edited.

To edit the information within the Employee Interview, select the Employee's name at the top of the Interview Sidebar to be navigated to the Employee's Story:

The screenshot shows the Interview sidebar on the right and search results on the left. The sidebar has a header 'Interview' with a sub-header 'Sandy Johnson (4295098121)'. Below it, there are three sections of questions, each with a 'Test' button. The first section is 'Accounting, Behavioral Questions, ...' with the question 'What size of payrolls have you produced?'. The second section is 'What accounting software programs do you have experience with?'. The third section is 'Tell me about your experience and skill level with general ledger accounting.'.

The search results on the left show a table with columns: Employee Id, Last Name, First Name, Branch, Is Active, Hire Status, and Phone. The first result is for Sandy Johnson, High Tech South East, who is Active and Eligible for Hire. Below the table is a table with columns: QUESTION, ANSWER, CATEGORY, and DATE. The first row shows the question 'What size of payrolls have you produced?' with the answer 'Test', category 'Accounting', and date '9/20/2021'. The second row shows the question 'What accounting software programs do you h...' with the answer 'Test', category 'Accounting', and date '9/20/2021'.

Employee Advanced Search

Begin by navigating to Search Employees > Advanced to navigate to the Advanced Search of Employees:

The screenshot shows the Employee Advanced Search interface. At the top, there are two tabs: 'BASIC' and 'ADVANCED'. The 'ADVANCED' tab is selected. Below the tabs, there is a search bar with a dropdown menu. The search criteria are: 'Is Active' with a dropdown menu set to 'IS TRUE' and a checkbox 'Show in results' checked. There are also buttons for 'NOT', 'AND', 'OR', 'RULE / GROUP', 'SAVE...', 'RESET', and 'SEARCH'.

The following Advanced Search fields can be used with the Interview Questionnaire functionality:

- Interview Name
- Interview Date
- Interviewed By
- Question Name
- Question Answer

Note For more information on Advanced Searching functionality within Beyond, please see the [Beyond - Advanced Searching](#) article.

[Back To Top](#)

Related Articles