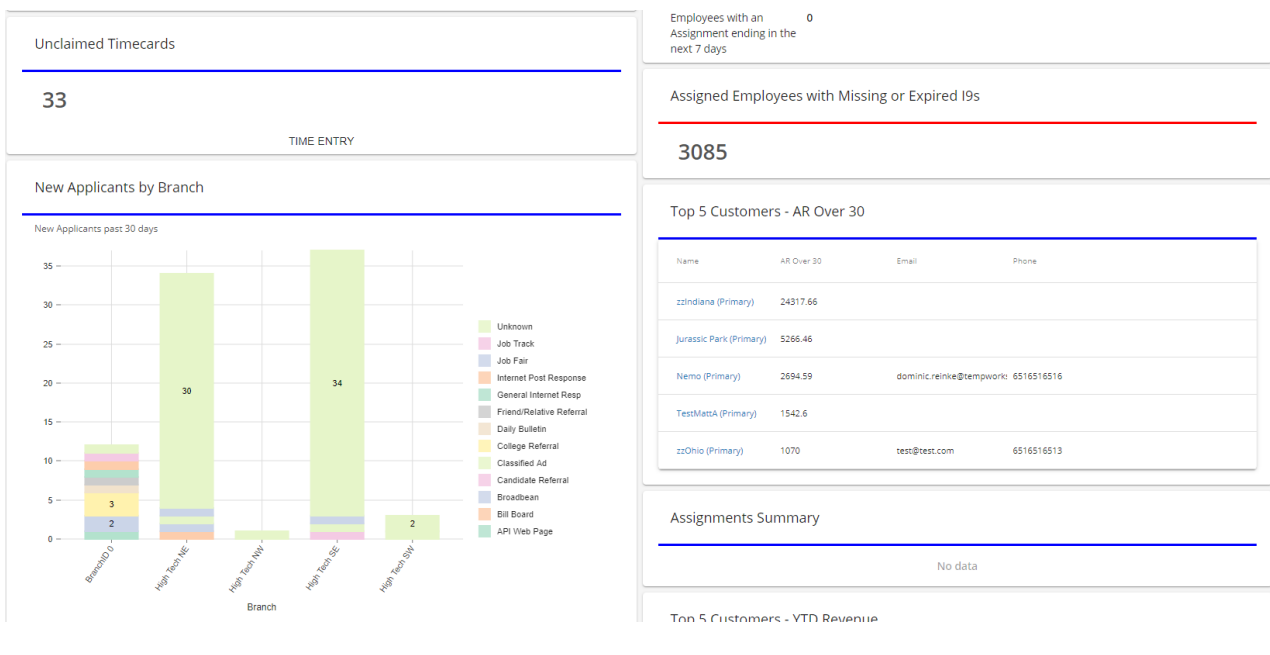


# Beyond - Insight Widget Access

Last Modified on 01/16/2020 10:55 am CST

## What are Insight Widgets?

Insight widgets provide snap shots of important information in your system. These options are located on your dashboard, the first thing every user sees when they log in. As an admin, you choose which widgets each user, or group of users, has access to. We recommend first reviewing a list of all the available default insight widgets so you have an idea of who you want to access which options.



## Setting Insight Widget Access

Each user needs to be given access to the insight widgets that are applicable to them before they can add them to their dashboards or see them on shared dashboards. Never used security groups before? Check out [Beyond - Managing Security Groups](#).

To Locate Insight Widget Security Settings:

1. Navigate to the  > System Settings
2. Select Security Groups

### 3. Select Insight Widgets

The screenshot shows a navigation bar at the top with a blue background and white icons for home, user, building, phone, clipboard, envelope, and profile. A search bar on the right contains the text "Search Anyth". Below the navigation bar is a breadcrumb trail: "System Settings > Security Groups > Insight Widgets".

The main content area is a light gray panel with a list of settings on the left and a details pane on the right. The list includes: External Service (with a downward arrow), Product Instances, Security Groups (with an upward arrow), Custom Data, Customer Status, Document Type, Message Action Type, Permission, Report, Insight Widgets (highlighted in gray), and Service Representatives.

The details pane on the right has a title: "Insight Widget security groups are used to... Widgets. Note that service reps may be a...". Below the title is a table with a header "Name ↑" and a "Filter..." input field. The table contains the following entries:

Name ↑
Dareks Widget test
High Tech NE Branch
High Tech Staffing SubSystem
Nikki Widget Test
TempWorks Default - All Insight Widgets
TempWorks Default - No Insight Widgets


**\*Note\*** We recommend reviewing or editing Security Group settings at your highest hierarchy level (ex. System or Subsystem) to give you the most control while making changes.

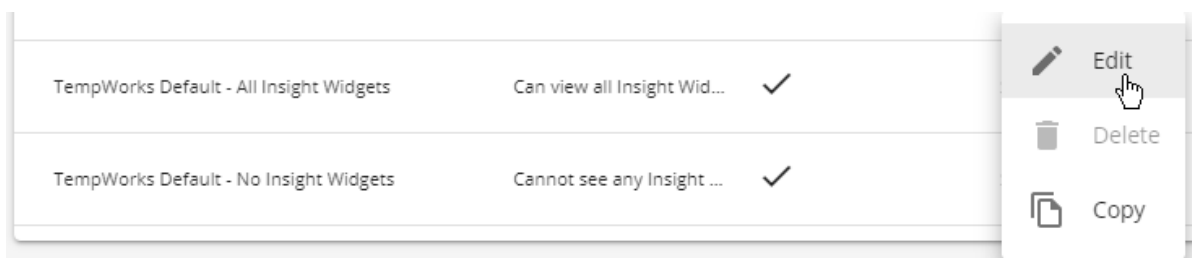
### Using Default Security Groups

There are 2 default security groups that TempWorks provides to make it easy for you to give access to those who need it right away.

- **TempWorks Default - All Insight Widgets:** Great for your admins, managers, and corporate who you want to have access to all the insight widgets available
- **TempWorks Default - No Insight Widgets:** Great for read-only or limited access users that do not need access to any insight widgets.

### Adding Users to the Default Groups:

1. In Security Groups > Insight Widgets section, Select the  to the right of the group you want to add users to
2. Select Edit



3. Select the + under Members

#### Insight Widgets Security Group

Name

TempWorks Default - All Insight Widgets

Description

Can view all Insight Widgets

Properties (23)

23 Selected

Filter...

Active Orders By Sales Team  
Chart - Bar

Assigned Employees with Missing or Expired I9s  
Single Value

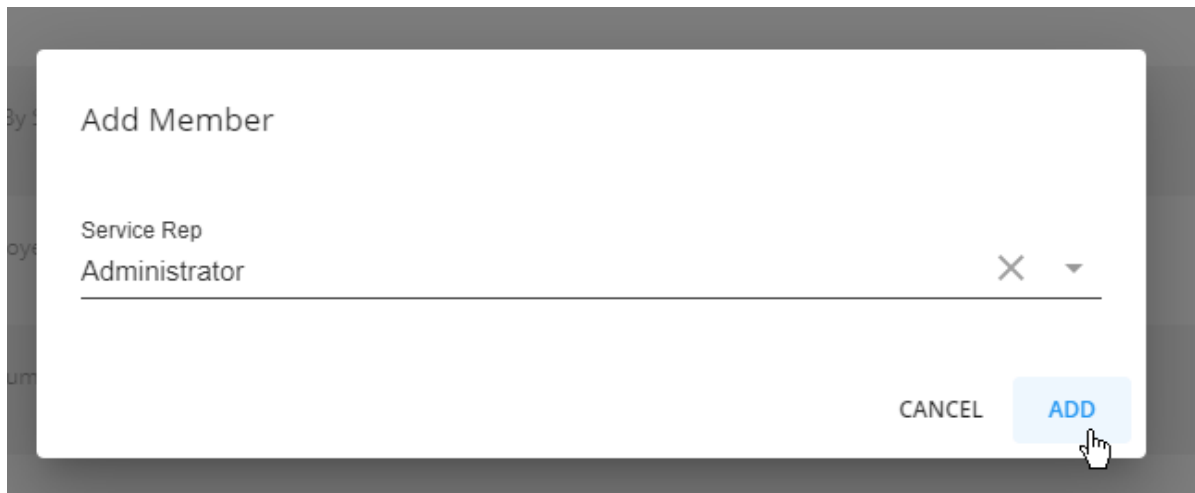
Assignments Summary  
Multi Value

Available Employees  
Multi Value

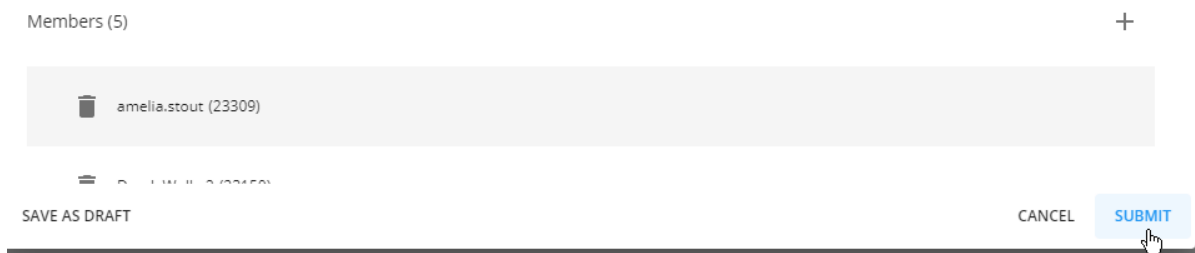
Members (4)



4. Start typing in a name or select it from the drop down



5. Select Add
6. Repeat steps 3-5 until all members have been added
7. Select Submit



**\*Note\*** If a user is not part of any Insight Widget Security Groups they will not be able to access any insight widgets.

## Additional Security Options

You may have some user groups in the middle that don't need access to everything, but should have access to some of the insight widgets available.

In these cases, you can create custom Security Groups to pick and choose what widgets they have access to. First, think of your users and come up with groups (maybe by role or information they care about, etc.). We find it's best to create a plan before you start making custom security groups.

1. In Security Groups > Insight Widgets section, Select the  to the right of one of

the default groups

2. Select the Copy option

3. Enter the following information:

- Name the security group (something easily identifiable so you later will know which users go in this group)
- Provide a description (optional but usually handy for your own admin notes)
- Select a Hierarchy Level (should default to your current level - we recommend setting this at the highest level so it applies to everything)
- Check or uncheck the different widgets you want available

4. Select the + under Members

5. Start typing in a name or select it from the drop down

6. Select Add

7. Repeat steps 4-6 until all users have been added

8. Select Submit

System Settings > Security Groups > Insight Widgets

Advanced Search

Insight Widgets

External Service

Product Instances

Security Groups

Custom Data

Customer Status

Document Type

Message Action Type

Permission

Report

Insight Widgets

Insight Widget security groups are used to grant service representatives access to Insight Widgets. Note that service reps may be a member of only one of this type of security group.

Name ↑	Description	System Default	Hierarchy	
Filter...	Filter...	Filter...	Filter...	
Dareks Widget test	Dareks Widget test		System	⋮
High Tech NE Branch	High Tech NE Branch		High Tech	⋮
High Tech Staffing SubSystem	High Tech Staffing SubS...		Sub System	⋮
Nikki Widget Test	Nikki Widget Test		224	⋮
TempWorks Default - All Insight Widgets	Can view all Insight Wid...	✓	System	⋮
TempWorks Default - No Insight Widgets	Cannot see any Insight ...	✓	System	⋮

## Sharing Dashboards with Teams

[Beyond Team functionality](#) allows you to group users for sharing searches, receiving tasks, and even sharing dashboard information.

A team dashboard can be created by anyone who has access and is in the team and configured to have the most important information for that team. For example, only showing messages in the message stream or tasks from people who belong to that team.

### Giving Someone Access to Create Team Dashboards:

A user will need the permission security group option: "Can edit Team Dashboards"

The screenshot shows a configuration page for a 'Permission Security Group'. The group name is 'All except Admin' and the description is 'All permissions except Admin'. Under the 'Properties (36)' section, 26 items are selected. A search filter is present. Three permissions are listed, with the second one, 'Can edit team dashboards', highlighted by a red rectangular box. The other permissions are 'Can edit saved searches' and 'Can enroll employees into paycards'. At the bottom, there are buttons for 'SAVE AS DRAFT', 'CANCEL', and 'SUBMIT'.

### Default Permission Security Groups with this access:

The following is a list of the default groups that have this permission

- Administrator
- Back Office Manager
- Front Office Manager
- Billing Clerk
- Pay Clerk
- Sales
- Staffing Specialist

## Related Articles