Beyond - Documents

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Storing Documents in Beyond

You can save and store documents electronically in Beyond. This can help make documents easier to find and stop you from having to buy another filing cabinet. Documents can be saved under the documents tab, found on most records.

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Documents can be stored on the following records:

Record Types	Example Documents
Employee	Save a copy of a resume, signed documents (ex. 19), saved
	correspondence, worker comp claims, etc.
Prospect	Save a copy of a business card, contact information, or
	quote provided to them
Customer	Save a copy of a contract, safety evaluation, and other
Customer	forms provided to this customer
	Save a business card or other documentation provided to
Contact	or sent by this contact
	Save the request from the customer for this job order
Order	and any specific documentation that is related to this
	order
Assignment	Save any specific documentation that is related to this
Assignment	assignment record.

Document types that are accepted include:

- 1. PDF
- 2. DOC
- 3. DOCX
- 4. XLS
- 5. XLSX
- 6. CSV

7. TXT

8. RTF

- 9. JPEG
- 10. PNG
- 11. GIF
- 12. ODT
- 13. HTML

This Article Includes:

- 1. Saving Documents to a Record
- 2. Searching for Documents
- 3. Creating a URL Link to a Document
- 4. Documents & Security

Saving Documents to a Record

Whether you scanned in a document, or saved an electronic document on your computer, you can save it to a record in Beyond.

Note If you are having employee's fill out onboarding documents such as an I-9 or W-4 online via HRCenter, their filled out forms will automatically save on their file in Beyond.

The maximum document size we allow for uploading is 26MB.

To Upload a Document

4.

- 1. Navigate to the record you want to add a document to
- 2. Select the + in the upper right

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3. Drag and drop the file or tap to select a file from your device

Document			
	Drop file here		
	or click to select a file.		
	*Required		
	Recommended .pdf, .doc, .txt (26MB)		
SAVE AS DRAFT		CANCEL	SUBMI

Document				
	ID Ca	rd 3.jpg		
	jpg	7.71 KB		
	REMO	VE FILE		
Name		Document Type		
Photo ID	≜	Photograph		*
Expiration Date				
5/1/2024	×	-		
Description				
Driver's License				
SAVE AS DRAFT			CANCEL S	UBMIT

- Name: Name of the document (ex. Amy's Resume)
- **Document Type:** Select what type of document this from the drop down. This is used for searching and security purposes

- Optionally, enter a expiration date if this file expires
- Optionally, enter a description or note about this particular document
- 5. Tap Submit to save the document

The document will now appear in the document section on the record to view, edit, download and preview. To preview the document, as seen to the right below, select from the list and the preview will generate for .txt, .pdf and .doc document files.

ONBOARDING PAY HISTORY 🗸 CUSTOM DATA	TUP 🗸	P/	REFERENCES	STORY	ASSIGNMENTS	MESSAGES	DOCUMENTS	*	DETAILS	VISIFILE	_
				Ð					nts	Documen	
Amy's Resume				:			020	4/1/20	Photo ID Photograp		
JANE DOE				:				ie /5/2020	Amy's Resum Resume 3	•	
SUMMARY OF QUALIFICATIONS											
 Dedicated and self-motivated individual offering a solid educational back administration, with extensive hands-on experience in quality customer ser- administration, and e-commerce business strategies. Tunked to delive the perp administration, and e-commerce business strategies. Tunked to delive the perp administration, and e-commerce business strategies are business of Excellent communication, organization and time management skills. Strong m needing little on supervision. Work will both independently and as a contrib team. Proven record of achievement in reducing costs, streamlining operatio generating long term customer commitments through superior customer service. Proficient in Windows 96/XP. Microsoft Office Suite (Word, Excel, Acces), Adobie Internet. Applied experience in diatabase management and Website deviopment. 											
Areas of Focus Business Administration / P&L Program & Project Le HR Operations Management Sales & Revenue Grov											

To Edit, Download, or Delete a Document:

- 1. Navigate to the document you wish to edit, download, or remove
- 2. Select the 🚦 icon to the right
- 3. Choose from the following options:

Docume	nts		Ð
C	Photo ID Photograph 4/1/2020		:
C	Amy's Resume Resume 3/5/2020	1	Edit
		⊎	Download
		Î	Delete
		_	_

- Choose Edit to change the information (document type, description, etc. of the document
- Choose Download to download a copy of the file
- Choose Delete to remove the document You may not have this option depending on your security

Searching for Documents

You can search for employees by which documents they have under advanced search. To learn more about searching check out Beyond - Advanced Searching.

When you create a new rule you can click the arrow on the left to open up the category and choose Document

category. This will show you all Document related fields you can search by:

Click to select a saved sear	rch					
I NOT AND OR		×	Ŧ	IS TRUE 💌	~	Show in results
Document	\times	~	<	Field		-
+ RULE / GROUP				Create date		
SAVE				Document N	ame	
5771				Document Ty	/pe	
				Document V	ersion	

Searching for records that have a specific document type:

ex. Document type equals Federal I-9

BASIC			ADVANCED				
E Click to select a saved search				^			
□ NOT AND OR I ⇒ Is Active	× •	IS TRUE 🔻	Show in results	×			
Document Type	× •	EQUALS -	Federal I-9	× • ×			
+ Show category / GROUP		=					
SAVE			RESET	SEARCH			

Searching for Expired Documents:

Keep document type rule and add another rule for expiration date is on or before [Today's date or date next week, etc.]

E Click to select a saved search							^
NOT AND OR							
I > Is Active	×	Ŧ	IS TRUE 👻	~	Show in results		×
Document Type	×	Ŧ	EQUALS -	Fed	eral I-9	× •	\times
Expiration Date	× -	IS	ON OR BEFORE	Ŧ	4/1/2020	×	\times
H RULE / GROUP							
SAVE			=		RESET	SEARC	:н

Searching for Missing Documents:

Use the group option and create a rule in the group where Document Type equals Federal I-9. Then check the box in the top left of the group to indicate NOT - meaning that the search will exclude people who have an I-9 on file which leaves only the employees who are missing the document.

BASIC	ADVANCED	
E Click to select a saved search		^
□ NOT AND OR I □ > Is Active	X - IS TRUE - Show in results	×
$ \begin{array}{ c c c } \hline \hline$	X - EQUALS - Federal I-9 X	• ×
+ RULE / GROUP	= RESET SE	ARCH

Creating a URL Link to a Document

In order to save time searching for specific documents, you have the ability to create a direct link to a document within Beyond. This link can then be given to another user to they are able to log into Beyond and be immediately directed to said document.

To Create a URL Link to a Document:

- 1. Navigate to the record (Employee, Prospect, Customer, Contact, Order) that contains the document you want to create the URL for.
- 2. Select the 'Documents' tab
- 3. Find the document you want to create the URL for and select the \vdots icon to see the options related to the document:

VISIFILE	DETAILS 🗸	DOCUMENTS	MESSAGES	JOB MATCHING	ASSIGNMENTS	STORY
Docum	ents				6	
C	Test Resume. Resume 8/12	docx /2021			:]

4. Select the option to 'Copy URL':

VISIFILE DETAILS	DOCUMENTS	MESSAGES	JOB MATCHING	ASSIGNME	NTS STORY
Documents					•
Test Resume 8	ne.docx /12/2021				:
				✓ ↓	Edit Download
				Ĵ.	Delete
				ß	Copy Url

5. Once selected, you will see the following confirmation message at the bottom of the page:



6. With the URL for the document copied, this can now be provided to another user for access.

Note When the user navigates to the URL to the document, if they are not already logged into Beyond, they will be prompted to log in.

Note Document permissions apply for the URL as well. Therefore, if the URL is provided to a user who does not have access to the viewing of documents in Beyond, they will not be able to see the document that the URL is referencing.

Documents & Security

Note You must be set as an admin with the correct permissions in order to review or change security for users. Talk with your manager if you think you need different permissions.

Some documents that you save may contain sensitive or secure information that not every one in your system should have access to. As an Administrator in Beyond, you can set up document security to limit who can upload, view, or remove documents based on document type.

New to security in Beyond? Check out Beyond - Managing Security Groups.

To Manage Document Security in Beyond:

- 1. Make sure you are at your highest Hierarchy level (system or subsystem, etc.)
- 2. Navigate to B Menu > System Settings > Security > Document Types:

B < Settings / / D	locument Types				
Proofing Error Management	Document Type security groups are us security group.	sed to grant service representatives read, write, and delete permissions for different docum	ents document types.	. Note that service reps may be a member of only one of this type	^{of} +
Required Document Types	Name 个	Description	System Default	Hierarchy	
Sales Teams	TempWorks	Filter	Filter	Filter	
Security ^	TempWorks Default - All Access	Can Read/Write all Document Types.	\otimes	System	:
Authentication 🗸 🗸	TempWorks Default - No Access	No Access to Document Types.	\otimes	System	:
Custom Data	TempWorks Default - Read Only - All	Can view all Document Types.	\otimes	System	:
Customer Statuses					
0					

3. Select the 👔 to the right of the security group you want to add members to or edit

Branch Managers	For Branch Managers	н :
TempWorks Default - All Access	Can Read/Write all Doc 🗸	🖍 Edit
TempWorks Default - No Access	No Access to Document 🗸	Delete
TempWorks Default - Read Only - All	Can view all Document 🗸	Copy

4. Select Edit

Document Type Security Group

Name	
Branch Managers	Â
Description	
For Branch Managers	
Properties (25)	6 Can Read 6 Can Write 1 Can Delete
Q Filter	
Applicant Portal Resume	Can Read Can Write Can Delete
Background Check	🗸 Can Read 🗸 Can Write 🔲 Can Delete
Care Now Report	🗸 Can Read 🖌 Can Write 🔲 Can Delete
CIA Result	🗸 Can Read 🖌 Can Write 🔲 Can Delete
Customer call	🗸 Can Read 🖌 Can Write 🔲 Can Delete
Documentation	🗸 Can Read 🗸 Can Write 🗌 Can Delete
Fadaral 9050	Con Pand Con Write Con Dalata
Members (4)	+
aaron (21775)	

- Read = View documents
- Write = Upload documents
- Delete = Remove documents

Default Groups Available:

TempWorks has a few default groups you can utilize. Default group permissions can not be edited but users can be added or removed from these groups.

TempWorks Default - All Access	Can Read/Write all Doc	
TempWorks Default - No Access	No Access to Document	
TempWorks Default - Read Only - All	Can view all Document	

- All Access Can Read/Write/Delete all document types
- No Access Can NOT Read/Write/Delete any document types
- Read Only Can only read (view) documents

We recommend considering your team members and customizing a few groups based on what they should have

access to. Review your employees and separate them into groups and then create or utilize the default groups to match the security accordingly.

For Example:

- 1. Admins/HR who should have all access to all documents
- 2. Managers that have access to most and can delete documents
- 3. Recruiters/Sales that can upload most document types but can not view docs with sensitive information and can not delete

Check out Beyond - Managing Security Groups for more information on creating your own groups.

Add Users To Groups

Whether you made your own or you've decided to use the TempWorks defaults, you will need to add each of your users to the correct document type security group to ensure they have the correct permissions.

- 1. Find the group you want to add users to
- 2. Select the 👔 to the right of the group
- 3. Select the + under the members section (towards the bottom) to add a new user

Customer call	\checkmark	Can Read	\checkmark	Can Write	\checkmark	Can Delete
Documentation	\checkmark	Can Read	\checkmark	Can Write	\checkmark	Can Delete
Fodoral OOEA		Cap Poad		Con Write		Can Dolata
Members (16)						+
alexander.swanson (24213)						

4. Type in a user's name or select from the drop down

,	Add Member		
:	Service Rep Ameli		٨
	Service Rep	Full Name	
	Amelia Stout	amelia.stout	

5. Select ADD

Add Member	
Service Rep	
amelia.stout	×
	CANCEL

6. Repeat 3 through 5 until all users are added

7. Once all users are added, tap on Submit in the lower right to save your changes

Related Articles