

Beyond - Job Order Required Documents

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Overview

Required documents allow you to store, track, and manage documents that are required for employees.

Users in Beyond have the ability to add and manage required documents on Customer, Job Order, and Employee records.

Note Required Document functionality is backwards compatible between Enterprise and Beyond. This means when a Required Document is created, modified, or removed within Enterprise, the same take place within Beyond. The process is the same from Beyond to Enterprise.

Note In order to view/add/edit Required Documents in Beyond, you must have the proper Security Group of Document Type with Read/Write permissions.

This article covers the following for Job Order Required Documents:

1. [Adding Job Order Required Documents](#)
2. [Editing Job Order Required Documents](#)
3. [Deleting Job Order Required Documents](#)
4. [Assignments Created from a Job Order with Required Documents](#)

Note This article is part of a series that outlines how to utilize Required Documents in Beyond. For more information, please see the following articles:

- [Beyond - Required Document Types](#)
- [Beyond - Customer Required Documents](#)
- [Beyond - Employee Required Documents](#)

Adding Job Order Required Documents

Note As mentioned within the [Beyond - Customer Required Documents](#) article, Required Documents setup within the Customer will automatically apply to newly created Job Orders under that customer.

Customer Record:

VISIFILE DETAILS ▾ DEFAULTS ▾ DOCUMENTS INVOICE HISTORY INVOICE SETUP ▾ MESSAGES CUSTOM DATA				
Apply required documents to departments <input checked="" type="checkbox"/>				+ ADD REQUIRED DOCUMENT
Type ↑	Category	Authority	Notes	Required
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓
SQL Test Results	HR Document	ALL		✓
Rows per page: 20 ▾ 1-3 of 3 < 1 >				

Newly created Job Order Record:

VISIFILE DETAILS ▾ CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA				
				+ ADD REQUIRED DOCUMENT
Type ↑	Category	Authority	Notes	Required
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓
SQL Test Results	HR Document	ALL		✓
Rows per page: 20 ▾ 1-3 of 3 < 1 >				

Begin by navigating to the Job Order record > Details > Required Documents:

VISIFILE DETAILS ▾ CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA				
				+ ADD REQUIRED DOCUMENT
Type ↑	Category	Authority	Notes	Required
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓
SQL Test Results	HR Document	ALL		✓
Rows per page: 20 ▾ 1-3 of 3 < 1 >				


Select the option for "+ Add Required Document" at the top right to open the window for adding a required document:

Add Required Document

Category
All Categories ▾

Type
Select type ▾

Documents (0)



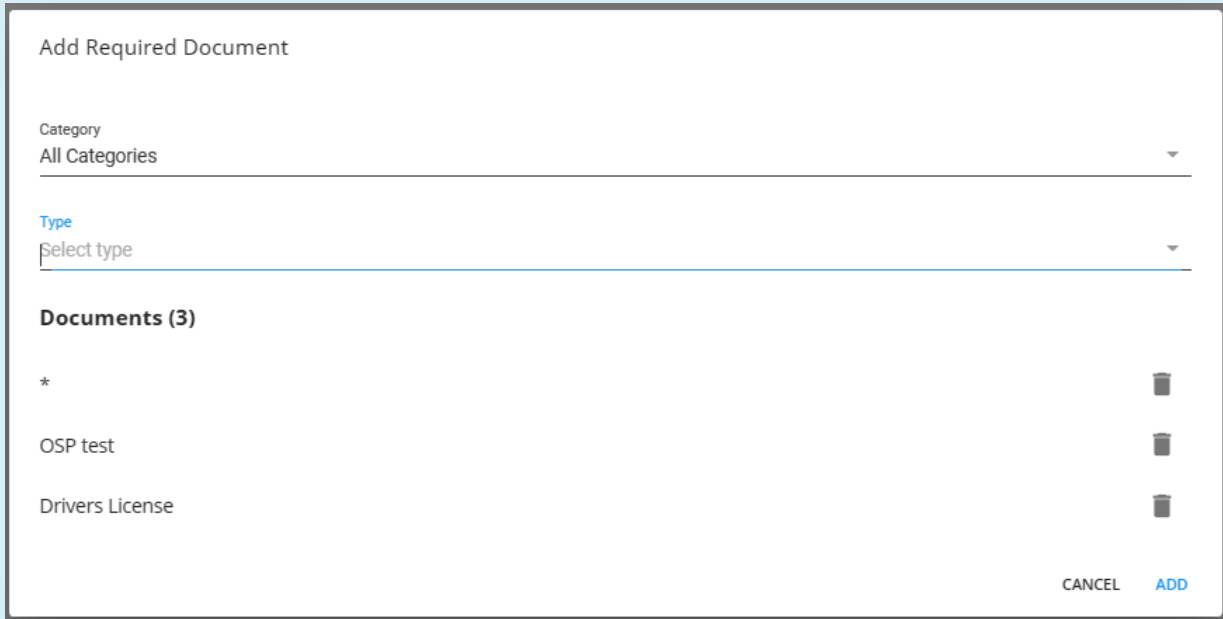
No documents added yet

[CANCEL](#) [ADD](#)

Select the following:

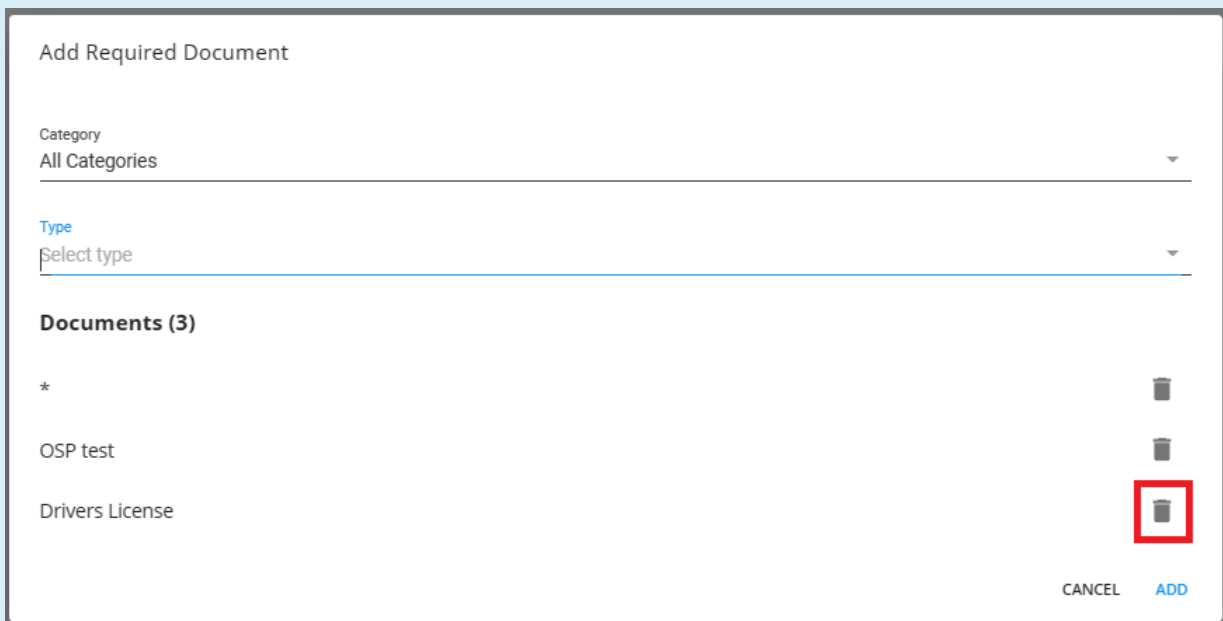
- **Category:** The category of the Required Document Type.
- **Type:** The Required Document Type.

Note You are able to add more than one Required Document at a time. Continue to select the Required Documents from the "Type" dropdown and they will appear within the "Documents" list:



The screenshot shows a form titled "Add Required Document". It has two dropdown menus: "Category" with "All Categories" selected, and "Type" with "Select type" selected. Below these is a section titled "Documents (3)" containing a list of three items: an asterisk (*), "OSP test", and "Drivers License". Each item has a trash can icon to its right. At the bottom right of the form are "CANCEL" and "ADD" buttons.

You can also remove a Required Document from the list by selecting the Trash Can icon to the right of the item:



This screenshot is identical to the previous one, but the trash can icon next to the "Drivers License" item is highlighted with a red square, indicating the removal action.

Once all of the Required Documents have been added for the Job Order, select "Add" at the bottom right:

Add Required Document

Category
All Categories

Type
Select type

Documents (3)

- *
- OSP test
- Drivers License

CANCEL **ADD**

You will now see the added Required Documents within the main list on the Job Order record:

Type ↑	Category	Authority	Notes	Required
*		ALL		✓
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓


Rows per page: 20 1-3 of 3

Note Additional added Required Documents on the Job Order will be added alongside those that have been automatically transferred from the Customer record (if the Customer record has pre-existing Required Documents).

Once the Required Documents have been added to the Job Order record, you can do the following:

- Edit
- Delete

Editing Job Order Required Documents

To edit a required document within the list, select the  icon to the right of the item and select "Edit":

Type ↑	Category	Authority	Notes	Required
*		ALL		✓
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓

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Within the "Edit Required Document" window, you will be able to modify the following:

- Required
- Notes

Once the changes are complete, select "Submit" for the changes to be saved.

Note When creating a Job Order, only the documents listed as "Required" will appear for the Employee:

Type ↑	Category	Authority	Notes	Required
*		ALL		
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓

Rows per page: 20 1-3 of 3 < 1 >

If a Job Order has a Required Document listed as "Not Required", that document will not show as Required for the Employee:

Type ↑	Category	Authority	Notes	Required
*		ALL		
Drivers License		ALL		✓
OSP test	HR Document	ALL		✓

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Deleting Job Order Required Documents

To delete a required document within the list, select the  icon to the right of the item and select "Delete":

Type ↑	Category	Authority	Notes	Required	
*		ALL		✓	⋮
Drivers License		ALL		✓	⋮
OSP test	HR Document	ALL		✓	⋮

Rows per page: 20 1-3 of 3 < 1 >

You will receive a confirmation prompt asking if you are sure you want to delete the specific Required Document from the Job Order record:

Confirm Delete

Are you sure you would like to delete *?

NO YES

Select "Yes" to confirm the deletion and once deleted, the Required Document will be removed from the list entirely:

Type ↑	Category	Authority	Notes	Required	
Drivers License		ALL		✓	⋮
OSP test	HR Document	ALL		✓	⋮

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Assignments Created from a Job Order with Required Documents

When an assignment is created from a Job Order that has Required Documents, and/or the Employee being assigned has Required Documents, a prompt will be received with the Assignment Restrictions in the event the Required Document(s) is missing and/or expired:

Add New Assignment - Assignment Restrictions

Enter Assignment Information 2 Assignment Restrictions

Approve All Assignment Restrictions

All restrictions must be approved in order to create the assignment

Assignment Restrictions

- Expired document: Background Check
Test, Auto
- Missing document: OSP test
Test, Auto
- Employee state (AL) does not match worksite state(MN)
test - testdepartmentconvert
- Employee I9 has not been received.
Test, Auto
- Employee is missing ACA Hire Date
Test, Auto

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

You have the option of navigating to the Employee record and making the necessary changes so these warnings are resolved, or you can select the checkbox "Approve All Assignment Restrictions" to bypass the warning.

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Related Articles