

# Beyond - Job Order Required Documents

Last Modified on 09/23/2021 3:41 pm CDT

## 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](#)

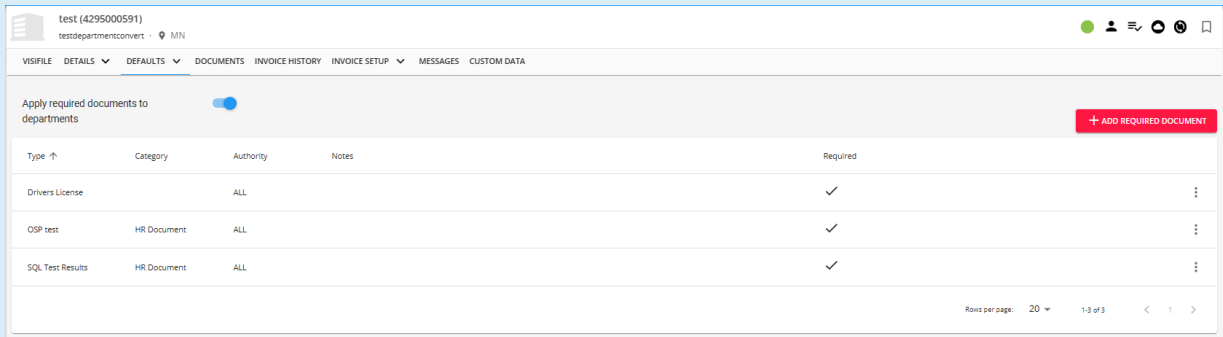
**\*Note\*** This article is part of a series that outlines how to utilize Required Documents in Beyond. For more information, please see the following articles:

- [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:



test (4295000591)  
testdepartmentconvert - MN

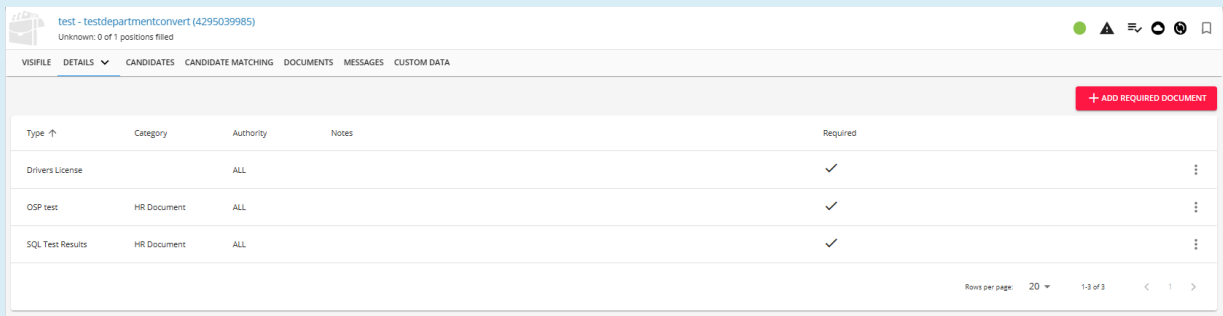
VISIFILE DETAILS DEFAULTS DOCUMENTS INVOICE HISTORY INVOICE SETUP MESSAGES CUSTOM DATA

Apply required documents to departments  [+ 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

## Newly created Job Order Record:



test - testdepartmentconvert (4295039985)  
Unknown: 0 of 1 positions filled

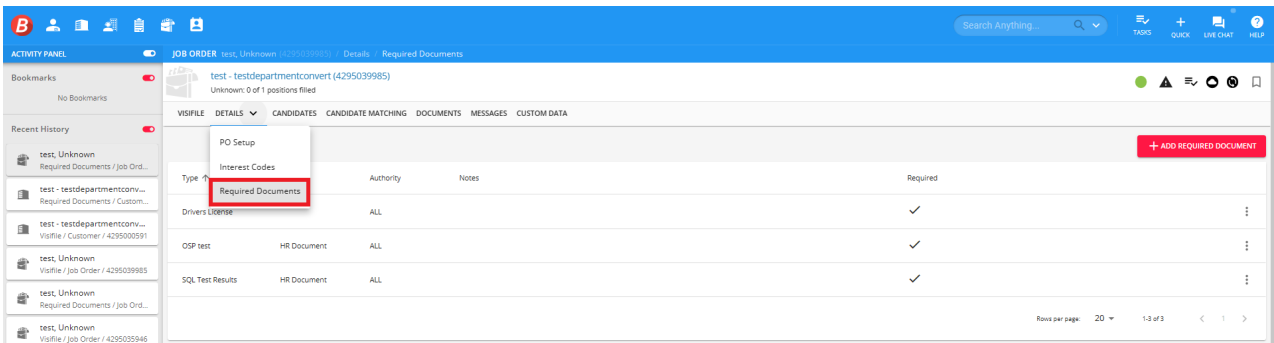
VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA

[+ 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

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



ACTIVITY PANEL **JOB ORDER** test, Unknown (4295039985) Details / Required Documents

test - testdepartmentconvert (4295039985)  
Unknown: 0 of 1 positions filled

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA

PO Setup  
Interest Codes  
**Required Documents**

[+ 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

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:

Add Required Document




Category  
All Categories ▼

---

Type  
Select type ▼

---

**Documents (3)**

*	
OSP test	
Drivers License	

CANCEL   ADD

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

### Add Required Document




Category  
All Categories

---

Type  
Select type

---

**Documents (3)**

- \* 
- OSP test 
- Drivers License 

CANCEL [ADD](#)

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:

test - testdepartmentconvert (4295039985)  
Unknown: 0 of 1 positions filled

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA

[+ ADD REQUIRED DOCUMENT](#)

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

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

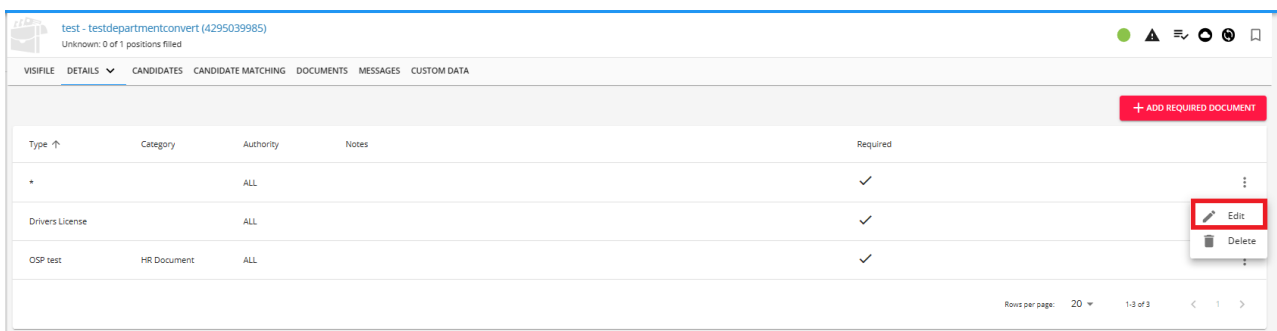
**\*Note\*** Additional added Required Documents on the Job Order will be added alongside those that have been automatically transferred from the Customer record (if the Customer record has pre-existing Required Documents).

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":

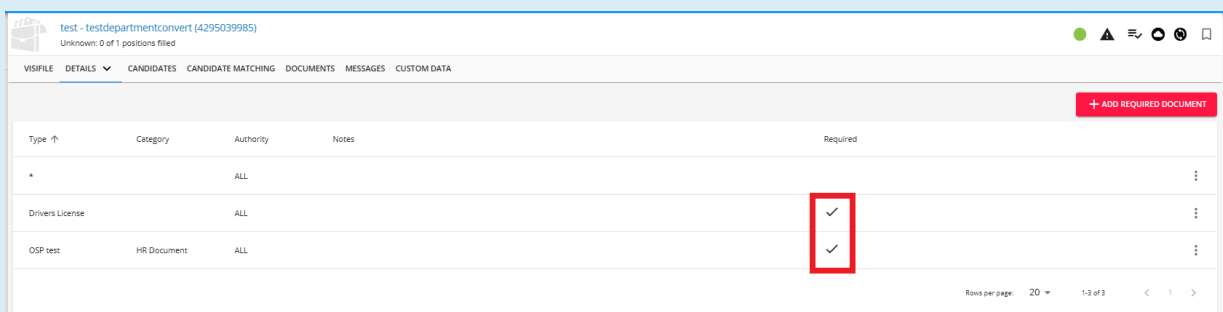


Within the "Edit Required Document" window, you will be able to modify the following:

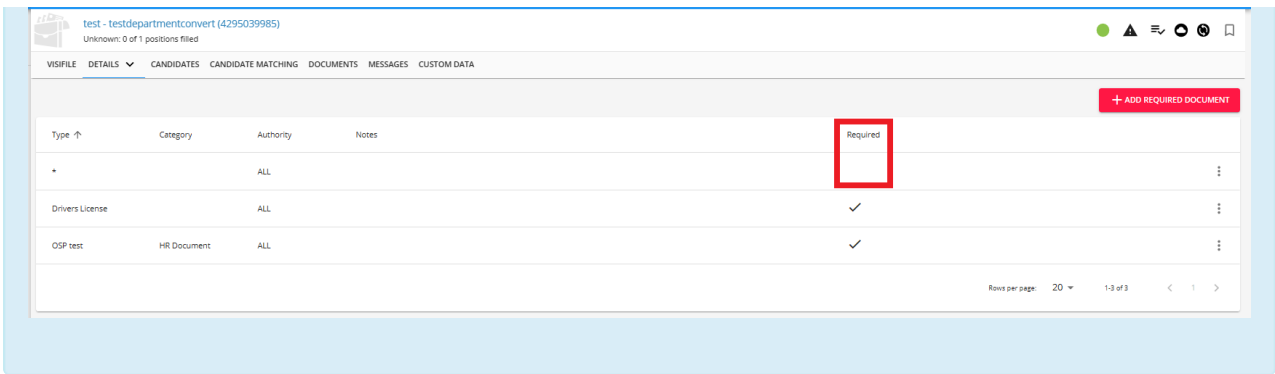
- Required
- Notes

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:

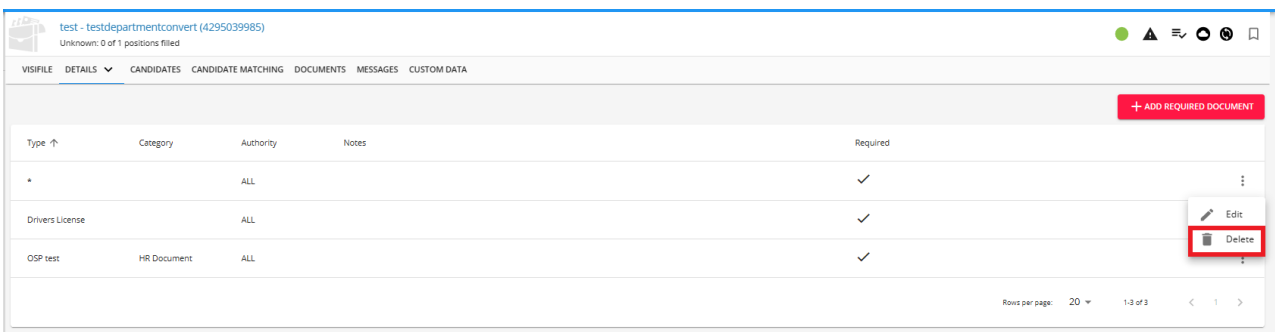


If a Job Order has a Required Document listed as "Not Required", that document will not show as Required for the Employee:

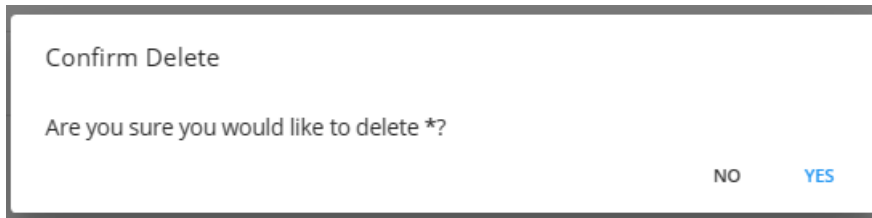


## Deleting Job Order Required Documents

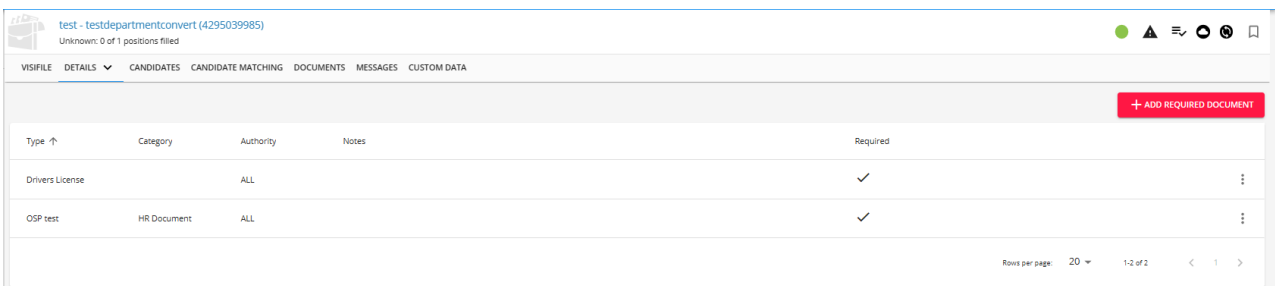
To delete a required document within the list, select the  icon to the right of the item and select "Delete":



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



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



## 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

1 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