

Beyond - Required Document Types

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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.

This article covers the following for Required Document Types:

1. [Adding Required Document Types](#)
2. [Editing Required Document Types](#)
3. [Deactivating Required Document Types](#)

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 - Customer Required Documents](#)
- [Beyond - Employee Required Documents](#)
- [Beyond - Job Order Required Documents](#)

Adding Required Document Types

Before being able to add required documents to a specific record type (Customer, Job Order, Employee), the corresponding required document type must be added within Beyond.

Note In order to see system settings or manage users you will need to have the "can administrate" permission. If you are missing this functionality and you are the Admin for your team, reach out to your TempWorks' Account Manager or our [TempWorks' Support Team](#).

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.

To begin, navigate to B Menu > System Settings > Required Document Types. You will be shown the list of required document types associated with your system:

Required Document Types + NEW REQUIREMENT TYPE

Create and manage requirement types to use required documents.

Search

Requirement Types (111)

Required Type ↑	Category	Description	Expire	Days Warning	Hierarchy	Status
Drivers License			365 days	14	System	Active
Drug Screen			365 days	14	System	Active
Drug Test			365 days	14	System	Active

Note You can search and filter the required document types within the list by utilizing the Search bar and header filters:

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Drug Screen			365 days	14	System	Active
Drug Test			365 days	14	System	Active

Select the option for "+ New Requirement Type" at the top right to open a new window to add the requirement type:

New Requirement Type

* Requirement Type Name Assign to Category ▼

Requirement Type Name is required.

Ex: Safety Certificate, Drivers License, etc.

* Hierarchy * Days Warning Before Expire

Select... 14

Hierarchy is required.

Default Expiration Date

None
 End Of This Year
 In Days After Document Upload

Description

Active

Requirement types cannot be deleted, they can only be edited or deactivated.

CANCEL SAVE

Enter the following information:

- **Required Type Name:** The name of the required document type.
- **Assign to Category:** The category that the required document type will be assigned to.
- **Hierarchy:** The hierarchy that the required document type will be accessible within.
- **Days Warning Before Expire:** A warning will appear for the user when the required document is this many days before expiring.
- **Default Expiration Date:** This can either be "None", "End Of This Year", or an amount of days after the upload of the required document.
- **Description:** The description of the required document type.
- **Active:** Select whether or not the required document type is Active.

Note If you would like additional Categories, please contact [TempWorks Support](#) to get them setup.

Note Required Document Types are unable to be deleted. They are only able to be edited or deactivated.

Once all of the required information has been entered, select "Save" within the window:

New Requirement Type

* Requirement Type Name
Test Required Document Type

Assign to Category
HR Document

Ex: Safety Certificate, Drivers License, etc.

* Hierarchy
High Tech Staffing

* Days Warning Before Expire
14

Default Expiration Date

None End Of This Year In Days After Document Upload

Description
This is a test Required Document Type.

Active

Requirement types cannot be deleted, they can only be edited or deactivated.

CANCEL **SAVE**

The newly created Required Document Type will now appear within the main list.

With the Required Document Type created, you have the ability to do the following:

- Edit
- Deactivate

Editing Required Document Types

To edit the Required Document Type, select the  icon to the right of the item and select "Edit".

You will be navigated back to "Edit Required Document" window with the same functionality as adding a new Required Document Type:

Edit Required Document

*** Requirement Type Name**
 Test Required Document Type
Ex: Safety Certificate, Drivers License, etc.

Assign to Category
 HR Document

*** Hierarchy**
 High Tech Staffing

*** Days Warning Before Expire**
 14

Default Expiration Date
 None End Of This Year In _____ Days After Document Upload

Description
 This is a test Required Document Type.

Active

Requirement types cannot be deleted, they can only be edited or deactivated.

CANCEL **UPDATE**

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

Deactivating Required Document Types

To deactivate the Required Document Type, select the  icon to the right of the item and select "Deactivate".

The Required Document Type will now show within the list as Deactivated.

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Related Articles