

# Beyond - Creating Security Groups with Advanced Permissions

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## Overview

Beyond allows for the creation of highly customized Security Groups which include precise restrictions for Service Reps within your system.

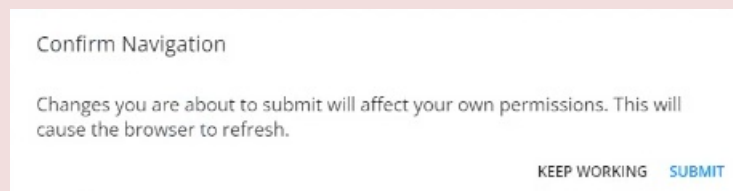
This article will outline the process to create a new Security Group using Advanced Permissions along with providing examples as to what is possible to restrict access to within Beyond.

**\*Note\*** For more general information about Security Groups and Service Representatives, please see the following articles titled [Beyond - Managing Security Groups](#) and [Beyond - Managing Your Service Representatives](#) respectively.

**\*Note\*** As explained later within this article, your ability to grant/restrict access to specific pages/cards/forms/fields within Beyond is directly linked to what you are able to view/edit within Beyond.

Therefore, please do not create a test Security Group with Advanced Permissions and link it to your personal Service Rep record in Beyond as this will prevent you access to information you had previous access to.

If you attempt to alter your own permissions, you will see the following message:



In the event this occurs, please contact [TempWorks Support](#) for further assistance.

### This article covers:

1. [Getting Started](#)
2. [Creating Security Groups with Advanced Permissions](#)
  - [Example Part 1: Creating and Configuring the Security Group](#)
  - [Example Part 2: The Before and After](#)
3. [Assigning Security Groups to Service Representatives](#)
4. [Managing Security Groups with Advanced Permissions](#)
5. [FAQ](#)

## Getting Started

Begin by navigating to Beyond > System Settings > Security > Advanced Permissions.

**\*Note\*** To access this section of Beyond, you will need to be a member of a Security Group with the "Can administrate" and "Can administrate security groups" permissions.

This will bring you to the "Advanced Permissions" screen, allowing you the ability to create and manage Security Groups that contain Advanced Permissions:

Manage permissions for individual pages, cards (sections within pages), forms, and form fields.					<a href="#">+ ADD SECURITY GROUP</a>
Name ↑	Description	System Default	Hierarchy		
Filter...	Filter...	Any	Filter...		
Admin	All Access	ⓧ	System		⋮
Admin (Ivelina's copy)	All Access	ⓧ	System		⋮
All	All	ⓧ	System		⋮
Betsy's Demo	Sample advanced group	ⓧ	System		⋮
BR No Merge	Cannot merge records	ⓧ	System		⋮
Department Creation Restricti...	Department Creation Restriction	ⓧ	System		⋮
Hide Prospect Functionality	Used to hide prospect functionality only	ⓧ	System		⋮
Hierarchy	Everything but hierarchy	ⓧ	System		⋮

## Creating Security Groups with Advanced Permissions

Within the "Advanced Permissions" screen, select the "+ Add Security Group" button at the top right to begin creating the Security Group:

Manage permissions for individual pages, cards (sections within pages), forms, and form fields.					<a href="#">+ ADD SECURITY GROUP</a>
Name ↑	Description	System Default	Hierarchy		
Filter...	Filter...	Any	Filter...		
Admin	All Access	ⓧ	System		⋮
Admin (Ivelina's copy)	All Access	ⓧ	System		⋮
All	All	ⓧ	System		⋮
Betsy's Demo	Sample advanced group	ⓧ	System		⋮
BR No Merge	Cannot merge records	ⓧ	System		⋮
Department Creation Restricti...	Department Creation Restriction	ⓧ	System		⋮
Hide Prospect Functionality	Used to hide prospect functionality only	ⓧ	System		⋮
Hierarchy	Everything but hierarchy	ⓧ	System		⋮

You will now see the "Advanced Permissions Security Group" window and you will be able to add the following required information:

- **Name:** The name of the Security Group that is being created.
- **Hierarchy Level:** The Hierarchy level this Security Group applies to (ex. system)
- **Description:** A brief description of the Security Group.

## Advanced Permissions Security Group

* Name	* Hierarchy Level
Advanced Permissions Security Group - Test	High Tech Staffing

\* Description

This is a test Security Group that contains Advanced Permissions.

BY PAGE      BY FIELD      Selecting a parent selects children ☒

Filter...

- Global
- Dashboard Page ☒ Access
- Employee ☒ Access
- Customer ☒ Access
- Contact ☒ Access
- Job Order ☒ Access
- Assignment ☒ Access
- Prospect ☒ Access
- Vendor ☒ Access

Once the required information has been added, you will now be able to add restrictions to specific pages/cards/forms/fields within Beyond via the drilldowns and checkboxes within the "Advanced Permissions Security Group" window.

**\*Note\*** Your ability to grant/restrict access to specific pages/cards/forms/fields within Beyond is directly linked to what you are able to view/edit within Beyond.

Therefore, please do not create a test Security Group with Advanced Permissions and link it to your personal Service Rep record in Beyond as this will prevent you access to information you had previous access to.

If you attempt to alter your own permissions, you will see the following message:

Confirm Navigation

Changes you are about to submit will affect your own permissions. This will cause the browser to refresh.

KEEP WORKING      [SUBMIT](#)

In the event this occurs, please contact [TempWorks Support](#) for further assistance.

The drilldown menus are setup in a way to show how items are viewed within Beyond, starting with the main areas (Dashboard, Employee, Customer, Contact, etc), and continuing into cards/forms/fields within said main area (Employee > Visifile > Add or Edit Contact Method > Contact Method):



Once it has been found, deselect the "Access" checkbox to the right of the ACA card.

**\*Note\*** This search field can be used to find any pages/cards/forms/fields that are able to be configured within Beyond.

BY PAGE BY FIELD

Search: ACA X

Selecting a parent selects children ✓

Global (3)	
Employee	✓ Access
Visifile (4) Page	✓ Access
Details	
Details Page	✓ Access
ACA Card	<input type="checkbox"/> Access
Change ACA Status (1) Form	✓ Access
Set hire date (1) Form	✓ Access
Candidates (1) Page	✓ Access

Follow the same process for the "Employee Hiring Information" form and the "Employee First Name" field:

BY PAGE BY FIELD

Search: Employee Hiring In X

Selecting a parent selects children ✓

Employee	✓ Access
Visifile Page	✓ Access
Employee Hiring Information Form	<input type="checkbox"/> Access
Staffing Specialist Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Job Order Type Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Activation Date Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Profession Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Numeric Rating Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Worked Hours Field	<input type="checkbox"/> Read <input type="checkbox"/> Write

BY PAGE BY FIELD

Search: first name X

Selecting a parent selects children ✓

Employee	✓ Access
Visifile Page	✓ Access
Employee Personal Information Form	✓ Access
First Name Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Details	
Details Page	✓ Access
Employee Personal Information Form	✓ Access
First Name Field	<input type="checkbox"/> Read <input type="checkbox"/> Write

**\*Note\*** By deselecting any item that has been labeled as a "Field", read/write access will be restricted for every location in which that specific field appears within Beyond, regardless of where it had been deselected within the "Advanced Permissions Security Group" window.

For this example, this means anywhere the Employee's First Name would appear within Beyond will now no

longer be seen by the Service Reps who are a member of this Security Group.

**\*Note\*** For items labeled as "Fields", they can have "Read" (able to view) and/or "Write" (able to edit) permissions restricted.

With the restrictions confirmed, select "Submit" to create the new Security Group with Advanced Permissions. Once saved, the Security Group will appear within the "Advanced Permissions" window:

Manage permissions for individual pages, cards (sections within pages), forms, and form fields.				+
Name ↑	Description	System Default	Hierarchy	
Filter...	Filter...	Filter...	Filter...	
Advanced Permissions Security Group - Test	This is a test Security Group that contains Advanced Permissions.		High Tech Staffing	⋮

## Example Part 2: The Before and After

With the Security Group created, here are the before and after scenarios within Beyond for a Service Rep that is a member of this new Security Group with Advanced Permissions:

### Assignment Page - Before:

VISIFILE	DETAILS	DOCUMENTS	MESSAGES	JOB MATCHING	ASSIGNMENTS	STORY	REFERENCES	PAY SETUP	ONBOARDING	PAY HISTORY	CUSTOM DATA
----------	---------	-----------	----------	--------------	-------------	-------	------------	-----------	------------	-------------	-------------

### Assignment Page - After:

VISIFILE	DETAILS	DOCUMENTS	MESSAGES	JOB MATCHING	STORY	REFERENCES	PAY SETUP	ONBOARDING	PAY HISTORY	CUSTOM DATA
----------	---------	-----------	----------	--------------	-------	------------	-----------	------------	-------------	-------------

### ACA Card - Before:

10961 Not Validated WorkN - Administrative / Clinical	⋮		
1st Shift Not Validated	⋮		
^ Equal Employment Opportunity			
Date of Birth	4/28/1996	Birth Place	--
Gender	M	Disabled	No
Veteran Status	I am a protected veteran but I choose not to self-identify the classifications to which I belong		E-Verified
Nationality	--	Citizen	Yes
I-9 Date Verified	--	Date Entered	1/23/2020
^ ACA			
Hire date needed			
^ Addresses			
Home	12345 SADF SAINT PAUL, MN 55121-2272 United States of America		
Temporary Address (Inactive)	--		

### ACA Card - After:

Interest Codes			
1 Testing	Not Validated		
10961	Not Validated		
WorkN - Administrative / Clerical			
1st Shift	Not Validated		
Equal Employment Opportunity			
Date of Birth	4/28/1996	Birth Place	--
Gender	M	Disabled	No
Veteran Status	I am a protected veteran but I choose not to self-identify the classifications to which I belong	E-Verified	No
Nationality	--	Citizen	Yes
I-9 Date Verified	--	Date Entered	1/23/2020
Addresses			
Home	12345 SADF SAINT PAUL, MN 55121-2272 United States of America		
Temporary Address (inactive)			


## Employee Hiring Information - Before:


Date of Birth	4/28/1996	Birth Place	--
Gender	M	Disabled	No
Veteran Status	I am a protected veteran but I choose not to self-identify the classifications to which I belong	E-Verified	No
Nationality	--	Citizen	Yes
I-9 Date Verified	--	Date Entered	1/23/2020
Addresses			
Home	12345 SADF SAINT PAUL, MN 55121-2272 United States of America		
Temporary Address (inactive)			
Hiring			
Washed Status	Familiar	Hire Status	Eligible for Hire >
Job Order Type	Temp	Profession	--
Job Title	--	Vendor	BadaVendorBing
Orientation Date	--	Anniversary Date	--
Activation Date	7/3/2018	Deactivation Date	--
Interviewed By	wc_admin on 8/10/2021	I-9	Not On File
Entered By	wc_admin	Staffing Specialist	wc_admin
Numeric Rating	0	WOTC Eligibility Status	--

## Employee Hiring Information - After (Upon Selecting Edit):

Date of Birth	4/28/1996	Birth Place	--
Gender	M	Disabled	No
Veteran Status	I am a protected veteran but I choose not to self-identify the classifications to which I belong	E-Verified	No
Nationality	--	Citizen	Yes
I-9 Date Verified	--	Date Entered	1/23/2020
Addresses			
Home	12345 SADF		
Temporary Address (inactive)			
Hiring			
Washed Status	Familiar	Hire Status	Eligible for Hire >
Job Order Type	Temp	Profession	--
Job Title	--	Vendor	BadaVendorBing
Orientation Date	--	Anniversary Date	--
Activation Date	7/3/2018	Deactivation Date	--
Interviewed By	wc_admin on 8/10/2021	I-9	Not On File
Entered By	wc_admin	Staffing Specialist	wc_admin
Numeric Rating	0	WOTC Eligibility Status	--

## Employee First Name - Before:

<

Alexander Abbott (4295173838)

 City, LA

---

**Bookmarks** ^

No bookmarks added.

VISIFILE
**DETAILS** ▾
DOCUMENTS
MESSAGES
JOB MATCHING
ASSIGNMENTS
STORY
REFERENCES
PAY SETUP ▾

^
Personal

Id	4295173838
Full Name	Alexander S Abbott
Nickname	--

Employee First Name - After:

<
\*\*\*\*\* Abbott (4295173838)  
 City, LA

---

**Bookmarks**   
 No bookmarks added.

[VISIFILE](#)   
 [DETAILS ▾](#)   
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 [PAY SETUP ▾](#)

Personal

Id <b>4295173838</b>
Full Name <b>***** S Abbott</b>
Nickname --

**Recent History**

- \*\*\*\*\* Abbott  
Details / 4295173838
- \*\*\*\*\* Abbott  
Visifile / 4295173838
- Employee Search

**\*Note\*** The above example was just one of many different types of Security Groups that you can create based on the number of pages/cards/forms/fields that are utilized within Beyond.

## Assigning Security Groups to Service Representatives

Once you have selected all the necessary restrictions for your Security Group, Service Representatives are able to be provided the new Security Group by selecting the "+" icon within the "Members" section of the "Advanced Permissions Security Group" window:



Advanced Permissions Security Group

\* Name  
Advanced Permissions Security Group - Test

\* Hierarchy Level  
High Tech Staffing

\* Description  
This is a test Security Group that contains Advanced Permissions.

BY PAGE BY FIELD Selecting a parent selects children ☒

Filter...

Global	
Dashboard <b>Page</b>	<input checked="" type="checkbox"/> Access
Employee	<input checked="" type="checkbox"/> Access
Customer	<input checked="" type="checkbox"/> Access
Contact	<input checked="" type="checkbox"/> Access
Job Order	<input checked="" type="checkbox"/> Access
Assignment	<input checked="" type="checkbox"/> Access
Prospect	<input checked="" type="checkbox"/> Access
Vendor	<input checked="" type="checkbox"/> Access

Members (0) +

No members added yet

SAVE AS DRAFT CANCEL SUBMIT

Once the "+" has been selected, choose the intended Service Representative from the "Service Rep" dropdown menu of the "Add Member" card, and select "Add":

**\*Note\*** Service Representatives can only be selected one at a time.

Add Member

Service Rep  
Alan Grant

X

CANCEL ADD

Once all the Service Representatives have been added to the Security Group, select "Submit" to finish:

Advanced Permissions Security Group

\* Name  
Advanced Permissions Security Group - Test

\* Hierarchy Level  
High Tech Staffing

\* Description  
This is a test Security Group that contains Advanced Permissions.

BY PAGE BY FIELD

Filter...

Global

Dashboard **Page**

Employee

Customer

Contact

Job Order

Assignment

Prospect

Vendor

Access

Access

Access

Access

Access

Access

Access

Access


Members (2)

Alan Grant (23185)

Api Test-User (30245)


SAVE AS DRAFT

CANCEL **SUBMIT**

Service Representatives can be removed from the list by selecting the  icon to the left of the Reps name.

**\*Note\*** For more information on managing Service Representatives, please see the article titled [Beyond - Managing Your Service Representatives](#).

## Managing Security Groups with Advanced Permissions

Security Groups that have been created have additional options by navigating to System Settings > Security > Advanced Permissions > 

These options include:

- Edit
- Delete
- Copy

## FAQ

The following answers have been provided for some frequently asked questions surrounding this functionality.

### New Pages/Cards/Forms/Fields from new Features in Beyond

**Q.** When a new feature is released to Beyond that adds pages/cards/forms/fields, how will this reflect within my custom Security Group with Advanced Permissions?

**A.** These new pages/cards/forms/fields will need to be granted access within your custom Security Group with Advanced Permissions. If the custom Security Group had been created before the new feature had been released to Beyond, the area will automatically be deselected within the Advanced Permissions options of the Security Group.

## Related Articles