

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.

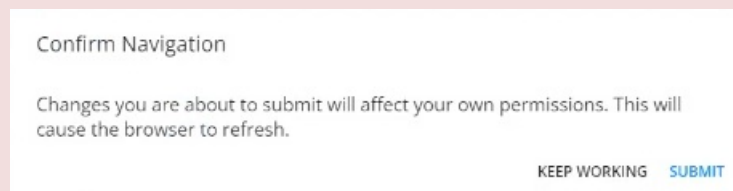
This article will outline the process to create a new Security Group using Advanced Permissions along with providing examples as to what is possible to restrict access to within Beyond.

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](#)
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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.				+
Name ↑	Description	System Default	Hierarchy	
Filter...	Filter...	Filter...	Filter...	
All Permissions	All permissions grante...	System		⋮
Object property Pe...	Object property Permi...	System		⋮

Creating Security Groups with Advanced Permissions

Within the "Advanced Permissions" screen, select the "+" icon at the top right to begin creating the Security Group.

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
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	<input type="checkbox"/>
Dashboard Page	<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

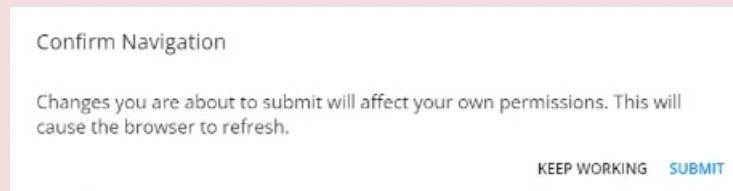
Once the required information has been added, you will now be able to add restrictions to specific

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:



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):

BY PAGE BY FIELD Selecting a parent selects children

Filter...

Employee		<input checked="" type="checkbox"/> Access
Visifile	Page	<input checked="" type="checkbox"/> Access
ACA	Card	<input checked="" type="checkbox"/> Access
Accrual Balances	Card	<input checked="" type="checkbox"/> Access
Add or Edit Contact Method	Form	<input checked="" type="checkbox"/> Access
Contact Method	Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write
Country Calling Code	Field	<input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write

Example Part 1: Creating and Configuring the Security Group

The following is an example of creating a Security Group that restricts access to an entire page (Assignment), an individual card (ACA), an individual field (Employee First Name), and an individual form (Employee Hiring Information).

To begin, deselect the "Access" checkbox to the right of "Assignment" within the list of drilldown menus. This will restrict the Service Representative that has been added as a member of this group the access to viewing/editing any and all information within the "Assignment" window of Beyond:

Note By deselecting the checkbox for the entire page and having the "Selecting a parent select children" checkbox selected, all cards/fields/forms within the parent will also be deselected.

If you do not want to restrict access for an entire page within Beyond, select the drilldown menu for additional cards/fields/forms to restrict access to.

BY PAGE BY FIELD Selecting a parent selects children

Filter...

Dashboard Page	<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 type="checkbox"/>	Access
Prospect	<input checked="" type="checkbox"/>	Access
Vendor	<input checked="" type="checkbox"/>	Access
Search	<input checked="" type="checkbox"/>	Access

Members (0) +

No members added yet

SAVE AS DRAFT

"Assignment" and its 76 children are now deselected. 125 selections changed.

CANCEL SUBMIT

Next, to find the ACA card we want to restrict access to, we will enter "ACA" into the "Filter" Search field to help find what we need.

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 Selecting a parent selects children

Q ACA X

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

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

BY PAGE BY FIELD Selecting a parent selects children

Employee Hiring In X

Employee	<input checked="" type="checkbox"/> Access
Visifile Page	<input checked="" type="checkbox"/> 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
Method Status Field	<input type="checkbox"/> Read <input type="checkbox"/> Write

BY PAGE BY FIELD Selecting a parent selects children

first name X

Employee	<input checked="" type="checkbox"/> Access
Visifile Page	<input checked="" type="checkbox"/> Access
Employee Personal Information Form	<input checked="" type="checkbox"/> Access
First Name Field	<input type="checkbox"/> Read <input type="checkbox"/> Write
Details	
Details Page	<input checked="" type="checkbox"/> Access
Employee Personal Information Form	<input checked="" type="checkbox"/> 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 / 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	
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 54321		
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.

Recent History
Alexander ...
Alexander ...
Employee Search

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP

Personal

Id
4295173838

Full Name
Alexzander S Abbott

Nickname
--

Employee First Name - After:

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

Bookmarks
No bookmarks added.

Recent History
***** Abbott
***** Abbott
Employee Search

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP

Personal

Id
4295173838

Full Name
***** S Abbott

Nickname
--

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 Access
- Employee Access
- Customer Access
- Contact Access
- Job Order Access
- Assignment Access
- Prospect Access
- Vendor 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

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 Selecting a parent selects children

🔍 Filter...

Global	
Dashboard Page	<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 (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