

# 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.

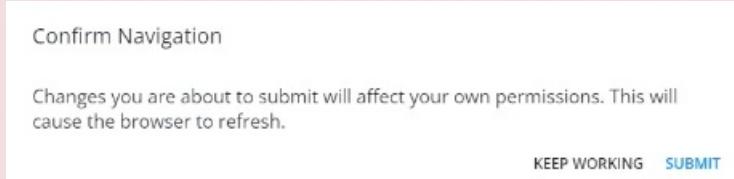
This article will outline the process to create a new Security Group using Advanced Permissions along with providing examples as to what is possible to restrict access to within Beyond.

**\*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.				<b>+ ADD SECURITY GROUP</b>
Name	Description	System Default	Hierarchy	
Admin	All Access	Any	System	⋮
Admin (Ivelina's copy)	All Access	Any	System	⋮
All	All	Any	System	⋮
Betsy's Demo	Sample advanced group	Any	System	⋮
BR No Merge	Cannot merge records	Any	System	⋮
Department Creation Restrict...	Department Creation Restriction	Any	System	⋮
Hide Prospect Functionality	Used to hide prospect functionality only	Any	System	⋮
Hierarchy	Everything but hierarchy	Any	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.				<b>+ ADD SECURITY GROUP</b>
Name	Description	System Default	Hierarchy	
Admin	All Access	Any	System	⋮
Admin (Ivelina's copy)	All Access	Any	System	⋮
All	All	Any	System	⋮
Betsy's Demo	Sample advanced group	Any	System	⋮
BR No Merge	Cannot merge records	Any	System	⋮
Department Creation Restrict...	Department Creation Restriction	Any	System	⋮
Hide Prospect Functionality	Used to hide prospect functionality only	Any	System	⋮
Hierarchy	Everything but hierarchy	Any	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

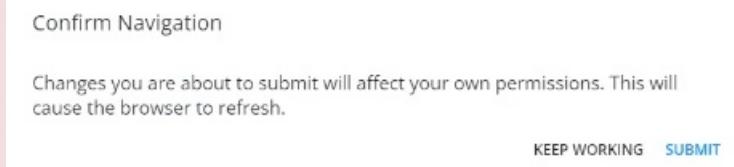
* Name Advanced Permissions Security Group - Test	* Hierarchy Level High Tech Staffing
* Description This is a test Security Group that contains Advanced Permissions.	
<input checked="" type="checkbox"/> BY PAGE <input type="checkbox"/> BY FIELD	
Selecting a parent selects children <input checked="" type="checkbox"/>	
<input type="text"/> Filter...	
<input type="checkbox"/> Global	
<input type="checkbox"/> Dashboard <input checked="" type="checkbox"/> Page	
<input type="checkbox"/> Employee	
<input type="checkbox"/> Customer	
<input type="checkbox"/> Contact	
<input type="checkbox"/> Job Order	
<input type="checkbox"/> Assignment	
<input type="checkbox"/> Prospect	
<input type="checkbox"/> Vendor	

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...

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

		Access
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

X

Category	Item	Access
Global (3)		<input checked="" type="checkbox"/>
Employee		<input checked="" type="checkbox"/>
Visifile (4) <span style="border: 1px solid blue; padding: 2px;">Page</span>		<input checked="" type="checkbox"/>
Details		<input checked="" type="checkbox"/>
Details <span style="border: 1px solid blue; padding: 2px;">Page</span>	ACA Card	<input type="checkbox"/>
Change ACA Status (1) <span style="border: 1px solid blue; padding: 2px;">Form</span>		<input checked="" type="checkbox"/>
Set hire date (1) <span style="border: 1px solid blue; padding: 2px;">Form</span>		<input checked="" type="checkbox"/>
Candidate (1) <span style="border: 1px solid blue; padding: 2px;">Page</span>		<input type="checkbox"/>

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

X

Category	Item	Access
Employee		<input checked="" type="checkbox"/>
Visifile <span style="border: 1px solid blue; padding: 2px;">Page</span>		<input checked="" type="checkbox"/>
Employee Hiring Information <span style="border: 1px solid blue; padding: 2px;">Form</span>		<input type="checkbox"/>
Staffing Specialist <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write
Job Order Type <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write
Activation Date <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write
Profession <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write
Numeric Rating <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write
Worked Hours <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write

BY PAGE      BY FIELD      Selecting a parent selects children

X

Category	Item	Access
Employee		<input checked="" type="checkbox"/>
Visifile <span style="border: 1px solid blue; padding: 2px;">Page</span>		<input checked="" type="checkbox"/>
Employee Personal Information <span style="border: 1px solid blue; padding: 2px;">Form</span>		<input checked="" type="checkbox"/>
First Name <span style="border: 1px solid blue; padding: 2px;">Field</span>		<input type="checkbox"/> Read <input type="checkbox"/> Write
Details		<input checked="" type="checkbox"/>
Details <span style="border: 1px solid blue; padding: 2px;">Page</span>		<input checked="" type="checkbox"/>
Employee Personal Information <span style="border: 1px solid blue; padding: 2px;">Form</span>		<input checked="" type="checkbox"/>
First Name <span style="border: 1px solid blue; padding: 2px;">Field</span>		<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
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:

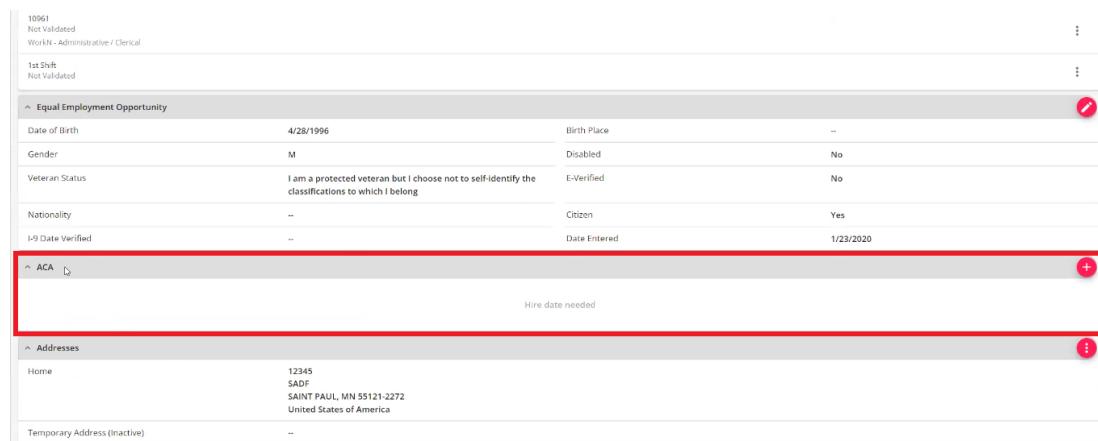
### Assignment Page - Before:



### Assignment Page - After:



### ACA Card - Before:



10961 Not Validated Work - 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
Work-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	<a href="#">Eligible for Hire &gt;</a>
Job Order Type	Temp	Profession	--
Job Title	--	Vendor	<a href="#">BadaVendorBing</a>
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)	--

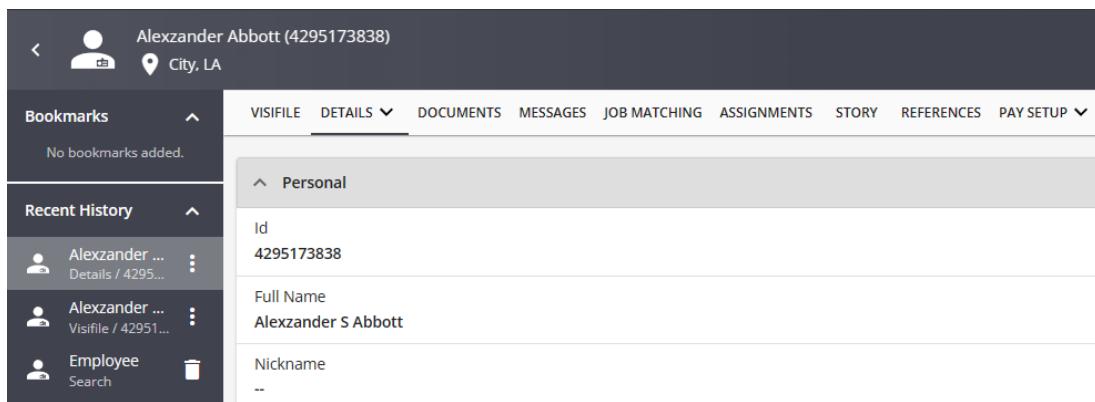
Hiring

Washed Status	Familiar	Hire Status	<a href="#">Eligible for Hire &gt;</a>
Job Order Type	Temp	Profession	--
Job Title	--	Vendor	<a href="#">BadaVendorBing</a>
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	--

Sorry, but you don't have permission to access this.

[CLOSE](#)

### Employee First Name - Before:



Alexander Abbott (4295173838)  
City, LA

Bookmarks  
No bookmarks added.

Recent History  
Alexander ... Details / 42951...  
Alexander ... Visifile / 42951...  
Employee Search

VISIFILE DETAILS DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP

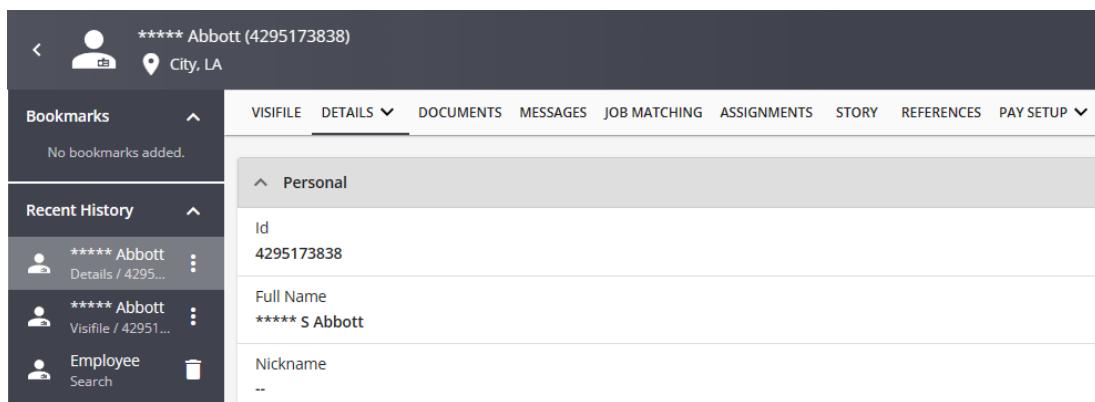
Personal

Id  
4295173838

Full Name  
Alexander S Abbott

Nickname  
--

Employee First Name - After:



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

Bookmarks  
No bookmarks added.

Recent History  
\*\*\*\*\* Abbott Details / 42951...  
\*\*\*\*\* Abbott Visifile / 42951...  
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 <input checked="" type="radio"/> BY FIELD <input type="radio"/> Selecting a parent selects children <input checked="" type="checkbox"/>					
<input type="text"/> Filter...					
<ul style="list-style-type: none"> <li>▼ Global</li> <li>▼ Dashboard <input checked="" type="checkbox"/> Page</li> <li>▼ Employee</li> <li>▼ Customer</li> <li>▼ Contact</li> <li>▼ Job Order</li> <li>▼ Assignment</li> <li>▼ Prospect</li> <li>▼ Vendor</li> </ul>					
<table border="1"> <tr> <td>Members (0)</td> <td>+</td> </tr> <tr> <td colspan="2">No members added yet</td> </tr> </table>		Members (0)	+	No members added yet	
Members (0)	+				
No members added yet					
SAVE AS DRAFT <span style="float: right;">CANCEL <input type="button" value="SUBMIT"/></span>					

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

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

## Advanced Permissions Security Group

\* Name  \* Hierarchy Level

\* Description

BY PAGE  BY FIELD  Selecting a parent selects children

Filter...

Category	Access
Global	<input checked="" type="checkbox"/> Access
Dashboard <input type="radio" value="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 type="checkbox"/> Access

Members (2)

<input type="button" value="Delete"/> Alan Grant (23185)
<input type="button" value="Delete"/> Api Test-User (30245)

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