

Document Type Security Enhancements

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Overview

In an effort to improve maintainability, performance, and security when accessing documents across Beyond, Enterprise, and WebCenter; TempWorks is implementing a new document storage solution that utilizes the power and efficiency of the cloud.

As a result, there are new security requirements when setting up users with Document Type permissions.

Note Self-Hosted clients do **not** need to take any further action.

Managing Document Type Security

With the implementation of the new document storage solution, documents within TempWorks products will only be accessible via Security Groups.

Note Please keep in mind the following:

- If you are **only** utilizing **Beyond**, you do not need to take any further action.
- If you are **only** utilizing **Enterprise**, you will need to convert your existing Document Type Security **Roles** into Security **Groups**.
- If you are utilizing **both Beyond and Enterprise**, you will need to validate Document Type permissions and make edits to Security **Groups** as necessary.
- New and existing users will need to be a member of the appropriate Document Type Security **Group** in order to **access documents** within TempWorks products.

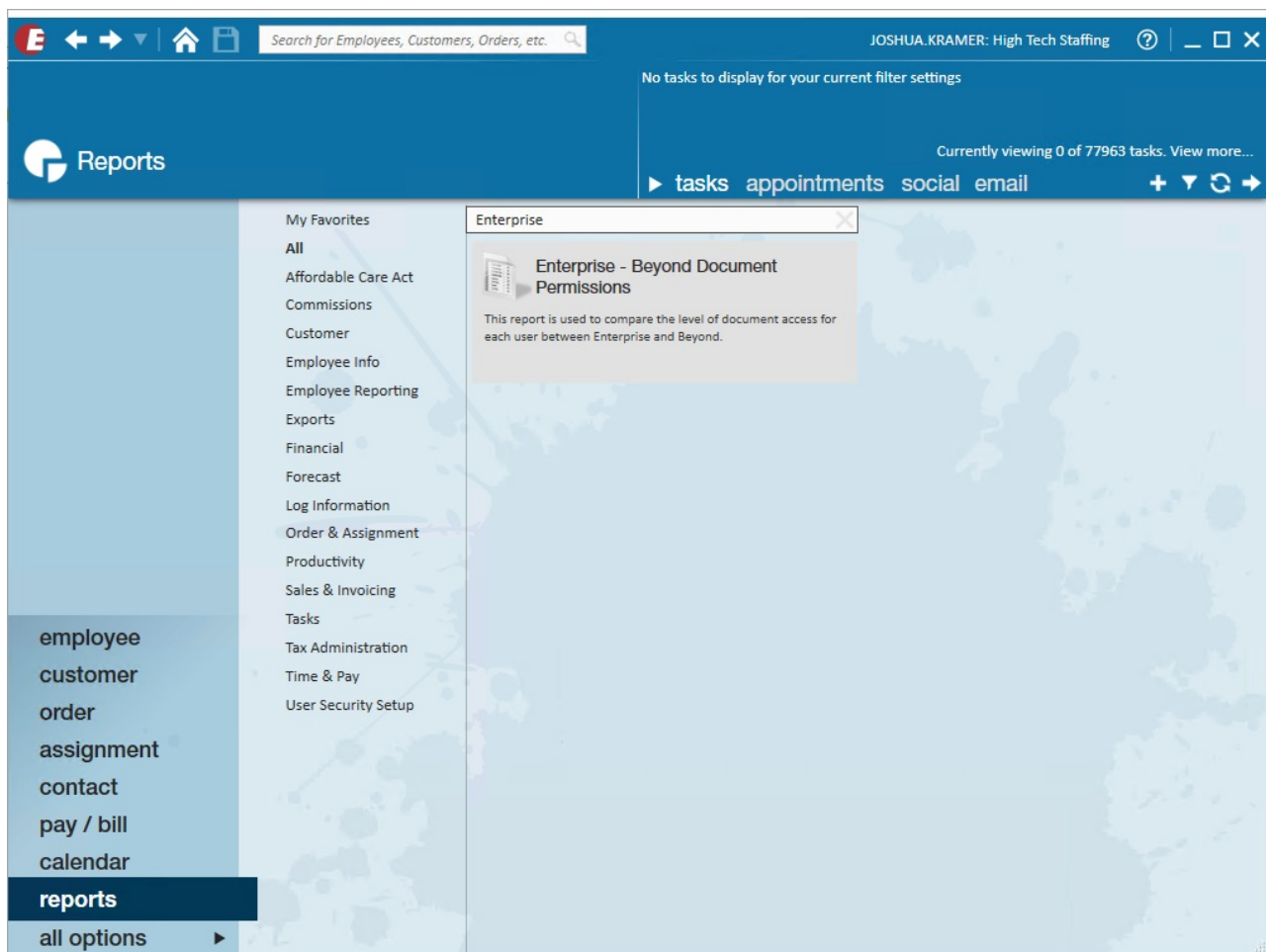
Once the document migration is complete, if users are **not** a member of a Document Type Security Group with the appropriate permissions, they will be **unable to access documents** within TempWorks products.

Utilizing the Document Type Security Report

Note TempWorks has created a report that includes a breakdown of the current Document Type permissions relationship between Beyond and Enterprise. This report, as outlined below, can be utilized to assist in determining which Service Reps require modified Document Type permissions.

To access the report, navigate to Enterprise > Reports > All > "Enterprise - Beyond Document Permissions":

Note When accessing the report, it is recommended you be at your highest allowed hierarchy.

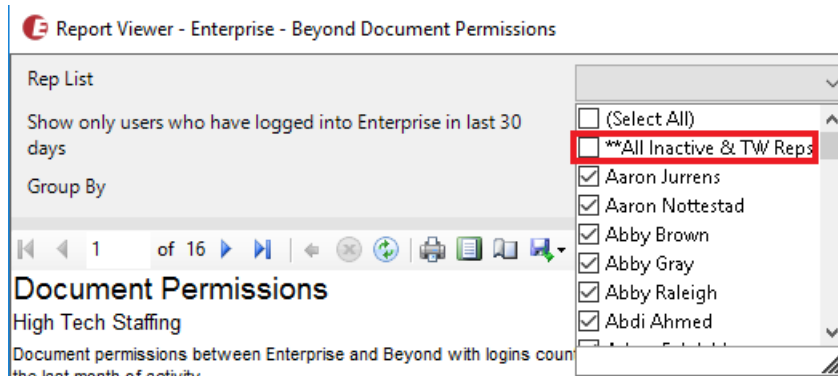


Note To access the report in Beyond, navigate to the B Menu > Reports > All Reports > "Enterprise - Beyond Document Permissions".

Understanding the Report Filters

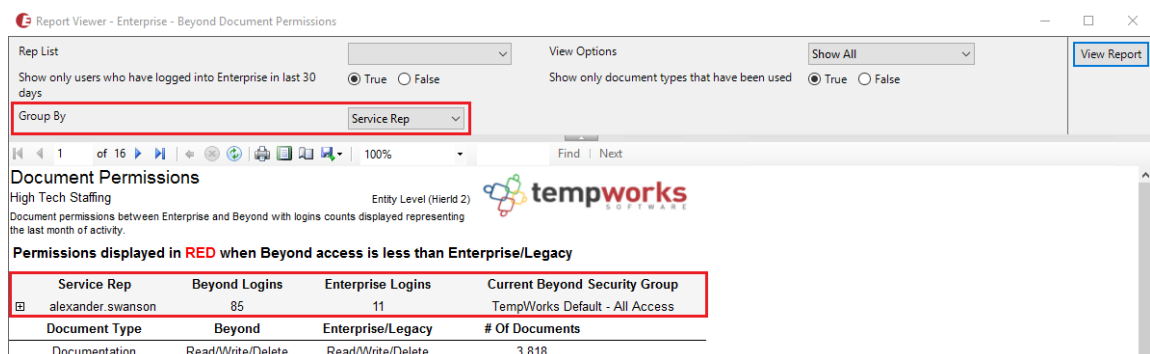
When running the report, please keep in mind the following information related to the filters:

- **Rep List:** Contains all Service Reps within your company.
 - If you are planning for the report to contain all Service Reps. choose the "(Select All)" option.
 - To remove **inactive** Service Reps from the report, make sure the "All Inactive" option is **not** selected.

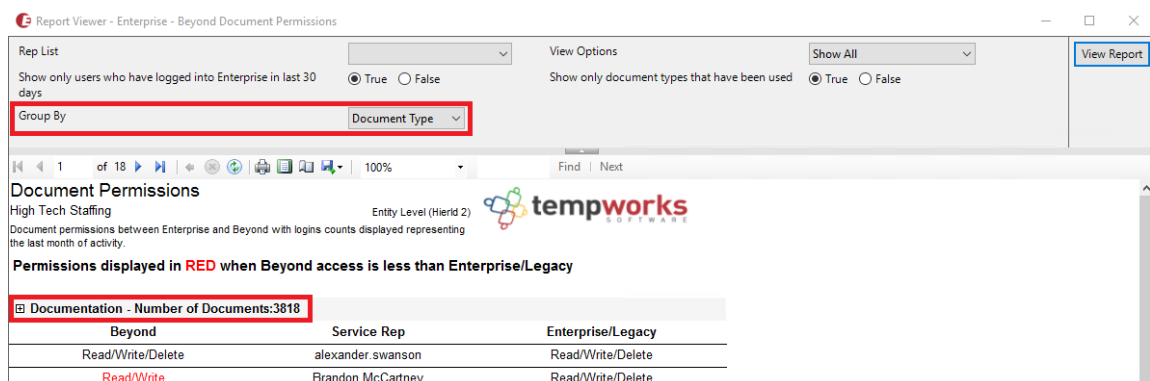


- **Show only users who have logged into Enterprise in last 30 days:** Shows Service Reps whether they have logged into Enterprise within the last 30 days.
 - If you want Service Reps that have logged into Enterprise within the last 30 days, select "True".
 - If you want all Service Reps to be included within the report, regardless of their last login into Enterprise, select "False".
- **Group By:** Determines how the report is grouped.
 - Select "Service Rep" to group all Document Types and related Permissions by the individual Service Rep:

Rep:



- Select "Document Type" to group all Service Reps by the individual Document Type and related Permissions:



- **View Options:** Shows the Document Type permission relationship between Beyond and Enterprise based on the option selected.
 - **Show All** - Shows all Document Type permissions and their corresponding relationship between Beyond and Enterprise:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False Group By: Service Rep

View Options: Show All ☒ True ☐ False View Report

Document Permissions
High Tech Staffing Entity Level (Hierid 2)
Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in RED when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
alexander.swanson	85	11	TempWorks Default - All Access

Document Type	Beyond	Enterprise/Legacy	# Of Documents
Documentation	Read/Write/Delete	Read/Write/Delete	3,819
Resume	Read/Write/Delete	Read/Write/Delete	3,584
Federal W-4	Read/Write/Delete	Read/Write/Delete	1,798
Federal I-9	Read/Write/Delete	Read/Write/Delete	1,564

- Only Visible in Beyond - Shows the Document Types that are only visible to the corresponding Service Rep within Beyond:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False Group By: Service Rep

View Options: Only Visible In Beyond ☒ True ☐ False View Report

Document Permissions
High Tech Staffing Entity Level (Hierid 2)
Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in RED when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
alexander.swanson	85	11	TempWorks Default - All Access

Document Type	Beyond	Enterprise/Legacy	# Of Documents
Federal 9175	Read/Write/Delete	Nothing	45
FADV Consent Form	Read/Write/Delete	Nothing	5
Timecard Adj Document	Read/Write/Delete	Nothing	3
Medical	Read/Write/Delete	Nothing	3
HR Center V4	Read/Write/Delete	Nothing	2

- Only Visible in Enterprise - Shows the Document Types that are only visible to the corresponding Service Rep within Enterprise:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False Group By: Service Rep

View Options: Only Visible in Enterprise ☒ True ☐ False View Report

Document Permissions
High Tech Staffing Entity Level (Hierid 2)
Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in RED when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
Brandon McCartney	10	1	All Document Types

Document Type	Beyond	Enterprise/Legacy	# Of Documents
COVID Religious Exemption	Nothing	Read/Write/Delete	28
Covid-19 Child Care Leave	Nothing	Read/Write/Delete	8
TestGeorgia	Nothing	Read/Write/Delete	3
COVID Proof of Booster	Nothing	Read/Write/Delete	1
COVID Initial Vaccine	Nothing	Read/Write/Delete	1
COVID Vaccine Series	Nothing	Read/Write/Delete	1
COVID Medical Exemption	Nothing	Read/Write/Delete	1

- Only Writable in Beyond - Shows the Document Types that are only able to be viewed and edited by the corresponding Service Rep within Beyond:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: alexander.swanson
Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False
Group By: Service Rep

View Options: Only Writable in Beyond
Show only document types that have been used: ☒ True ☐ False

Document Permissions
High Tech Staffing
Entity Level (Hierid 2)
Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in RED when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
alexander.swanson	85	11	TempWorks Default - All Access

Document Type	Beyond	Enterprise/Legacy	# Of Documents
Federal 9175	Read/Write/Delete	Nothing	45
FADV Consent Form	Read/Write/Delete	Nothing	5
Medical	Read/Write/Delete	Nothing	3
Timecard Adj Document	Read/Write/Delete	Nothing	3
HR Center V4	Read/Write/Delete	Nothing	2

- Only Writable in Enterprise - Shows the Document Types that are only able to be viewed and edited by the corresponding Service Rep within Enterprise:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: Brandon McCartney
Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False
Group By: Service Rep

View Options: Only Writable in Enterprise
Show only document types that have been used: ☒ True ☐ False

Document Permissions
High Tech Staffing
Entity Level (Hierid 2)
Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in RED when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
Brandon McCartney	10	1	All Document Types

Document Type	Beyond	Enterprise/Legacy	# Of Documents
COVID Religious Exemption	Nothing	Read/Write/Delete	28
Covid-19 Child Care Leave	Nothing	Read/Write/Delete	8
TestGeorgia	Nothing	Read/Write/Delete	3
COVID Initial Vaccine	Nothing	Read/Write/Delete	1
COVID Proof of Booster	Nothing	Read/Write/Delete	1
COVID Medical Exemption	Nothing	Read/Write/Delete	1
COVID Vaccine Series	Nothing	Read/Write/Delete	1

- Only Deletable in Beyond - Shows the Document Types that are only able to be removed from records by the corresponding Service Rep within Beyond:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: alexander.swanson
Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False
Group By: Service Rep

View Options: Only Deletable in Beyond
Show only document types that have been used: ☒ True ☐ False

Document Permissions
High Tech Staffing
Entity Level (Hierid 2)
Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in RED when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
alexander.swanson	85	11	TempWorks Default - All Access

Document Type	Beyond	Enterprise/Legacy	# Of Documents
Federal 9175	Read/Write/Delete	Nothing	45
PeopleG2 Background Check	Read/Write/Delete	Read/Write	12
FADV Consent Form	Read/Write/Delete	Nothing	5
Timecard Adj Document	Read/Write/Delete	Nothing	3
Medical	Read/Write/Delete	Nothing	3
HR Center V4	Read/Write/Delete	Nothing	2

- Only Deletable in Enterprise - Shows the Document Types that are only able to be removed from records by the corresponding Service Rep within Enterprise:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: Brandon McCartney

Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False

Group By: Service Rep

View Options: **Only Deletable in Enterprise** (highlighted)

Show only document types that have been used: ☒ True ☐ False

View Report

Document Permissions

High Tech Staffing

Entity Level (Hierid 2)

Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in **RED** when Beyond access is less than Enterprise/Legacy

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
Brandon McCartney	10	1	All Document Types
Document Type	Beyond	Enterprise/Legacy	# Of Documents
Documentation	Read/Write	Read/Write/Delete	3,819
Resume	Read/Write	Read/Write/Delete	3,584
Federal W-4	Read/Write	Read/Write/Delete	1,798
Federal I-9	Read/Write	Read/Write/Delete	1,564
Timecard Image	Read/Write	Read/Write/Delete	904
Order Contract	Read/Write	Read/Write/Delete	391

- Show only document types that have been used:
 - (Recommended) Select "True" to only show document types that have been used within your system.
 - Select "False" to show all document types.

Note Located at the top of the report is a banner that states "Permissions displayed in **RED** when Beyond access is less than Enterprise/Legacy":

Report Viewer - Enterprise - Beyond Document Permissions

Rep List: Brandon McCartney

Show only users who have logged into Enterprise in last 30 days: ☒ True ☐ False

Group By: Service Rep

View Options: Show All

Show only document types that have been used: ☒ True ☐ False

View Report

Document Permissions

High Tech Staffing

Entity Level (Hierid 2)

Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in **RED** when Beyond access is less than Enterprise/Legacy

This means that when permissions under the "Beyond" column are **red**, the service rep has **less access** to documents with that Document Type in Beyond vs Enterprise:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List

Show only users who have logged into Enterprise in last 30 days

Group By

Service Rep

View Options

Show only document types that have been used

Show All

View Report

2 of 16

100%

Find | Next

Service Rep	Beyond Logins	Enterprise Logins	Current Beyond Security Group
Brandon McCartney	10	1	All Document Types
Document Type	Beyond	Enterprise/Legacy	# Of Documents
Documentation	Read/Write	Read/Write/Delete	3,819
Resume	Read/Write	Read/Write/Delete	3,586
Federal W-4	Read/Write	Read/Write/Delete	1,798
Federal I-9	Read/Write	Read/Write/Delete	1,564
Timecard Image	Read/Write	Read/Write/Delete	904
Order Contract	Read/Write	Read/Write/Delete	391
State W4	Read/Write	Read/Write/Delete	360
Background Check	Read/Write	Read/Write/Delete	351
Marketing	Read/Write	Read/Write/Delete	330
Photograph	Read/Write	Read/Write/Delete	129
Proposal	Read/Write	Read/Write/Delete	114
Mag Media	Read/Write	Read/Write/Delete	74
Care Now Report	Read/Write	Read/Write/Delete	58
Applicant Portal Resume	Read/Write	Read/Write/Delete	55
Provelt Test Result	Read/Write	Read/Write/Delete	54
Nelco Form	Read/Write	Read/Write/Delete	45
Federal 8850	Read/Write	Read/Write/Delete	43
COVID Religious Exemption	Nothing	Read/Write/Delete	28
Transcripts	Read/Write	Read/Write/Delete	28
CIA Result	Read/Write	Read/Write/Delete	22
Customer call	Read/Write	Read/Write/Delete	21
PeopleG2 Background Check	Read/Write	Read/Write	12
Covid-19 Child Care Leave	Nothing	Read/Write/Delete	8
Federal W-9	Read/Write	Read/Write/Delete	8
Federal 9852	Read/Write	Read/Write/Delete	4

With Document Type security now requiring the setup of Security Groups, the end goal is to have your Document Type permissions **match** between Beyond and Enterprise.

Example Scenarios for Running the Report

The following examples are based on your current utilization of Beyond and/or Enterprise.

Enterprise Only

With this scenario, we only utilize Enterprise and therefore do not have any Security Groups configured within our system.

The below example contains the following filter options:

- **Rep List:** All selected, with the "All Inactive" option **not** selected.
- **Show only users who have logged into Enterprise in last 30 days:** "True"
- **Group By:** Document Type
- **View Options:** "Only Writable in Enterprise" or "Only Deletable in Enterprise"
 - Either of these options should be chosen due to the point that Document Types that are able to be edited/deleted can also be viewed.
- **Show only document types that have been used:** "True"

Once the report is run based on the above parameters, keep in mind the following information related to the columns within the report:

- **Document Type:** When uploading a document to a record, these are the values presented within the dropdowns.
- **Beyond:** The Service Rep's current Document Type permissions within Beyond.
- **Enterprise/Legacy:** The Service Rep's current Document Type permissions within Enterprise.
- **# Of Documents:** The number of documents within your system that are under that specific Document Type.

With the above filter options selected, we are able to see the Document Types that are accessible by individual Service Reps within Enterprise, but not within Beyond:

Report Viewer - Enterprise - Beyond Document Permissions

Rep List

Show only users who have logged into Enterprise in last 30 days

☒ True
☐ False

Group By

Document Type

View Options

Only Writable in Enterprise

☒ True
☐ False

Show only document types that have been used

View Report

1 of 5

100%

Find | Next

Document Permissions

System Level (Hield 1)

tempworks SOFTWARE

Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.

Permissions displayed in **RED** when Beyond access is less than Enterprise/Legacy

Documentation - Number of Documents:3940

Beyond	Service Rep	Enterprise/Legacy
Nothing	Ian.lehfeldt	Read/Write/Delete

Resume - Number of Documents:3678

Beyond	Service Rep	Enterprise/Legacy
Nothing	Ian.lehfeldt	Read/Write/Delete

Federal W-4 - Number of Documents:1839

Beyond	Service Rep	Enterprise/Legacy
Nothing	Ian.lehfeldt	Read/Write/Delete

Federal 1042 - Number of Documents:1587

With this information, we can make an informed decision as to whether Service Reps can be added to an existing Default Security Group or if a new Document Type Security Group will need to be created with the appropriate permissions (instructions below).

Beyond & Enterprise

With this scenario, we utilize both Beyond and Enterprise and therefore have Document Type permissions that might not match between the two.

The below example contains the following filter options:

- **Rep List:** All selected, with the "All Inactive" option **not** selected.
- **Show only users who have logged into Enterprise in last 30 days:** "True"
- **Group By:** Document Type
- **View Options:** Show All
- **Show only document types that have been used:** "True"

Once the report is run based on the above parameters, keep in mind the following information related to the columns within the report:

- **Document Type:** When uploading a document to a record, these are the values presented within the dropdowns.
- **Beyond:** The Service Rep's current Document Type permissions within Beyond.
- **Enterprise/Legacy:** The Service Rep's current Document Type permissions within Enterprise.
- **# Of Documents:** The number of documents within your system that are under that specific Document Type.

The screenshot shows the 'Report Viewer - Enterprise - Beyond Document Permissions' window. The filters are set to: Rep List (All), Show only users who have logged into Enterprise in last 30 days (True), Group By (Document Type), View Options (Show All), and Show only document types that have been used (True). The report title is 'Document Permissions' and it is for 'System Level (Hield 1)'. The subtitle is 'Document permissions between Enterprise and Beyond with logins counts displayed representing the last month of activity.' The main heading is 'Permissions displayed in RED when Beyond access is less than Enterprise/Legacy'. The report shows a table with 3 columns: Beyond, Service Rep, and Enterprise/Legacy. The table is filtered by 'Documentation - Number of Documents: 3940'. The table shows permissions for Brandon, with 'Read/Write/Delete' in Enterprise/Legacy and 'Read/Write' or 'Nothing' in Beyond.

Beyond	Service Rep	Enterprise/Legacy
Read/Write/Delete	alexander.swanson	Read/Write/Delete
Read/Write/Delete	andrew.bridges	Read/Write/Delete
Read/Write/Delete	Derek Palm	Read/Write/Delete
Nothing	Ian.lehfeldt	Read/Write/Delete
Read/Write/Delete	Jacob Kelly	Read/Write/Delete
Read/Write	Jawon Bryant	Read/Write/Delete
Read/Write	Jessy Abraham	Read/Write/Delete
Read/Write	Josh Carlin	Read/Write/Delete
Read/Write/Delete	kyleb	Read/Write/Delete
Read/Write	Macy Daugaard	Read/Write/Delete

Based on the above example, we see that Brandon has access to Read/Write/Delete for many Document Types in Enterprise but only has access to Read/Write, and in some cases has no permissions, for those same Document Types within Beyond.

Therefore, if the Service Rep requires additional Document Type permissions, it is recommended you do the following:

- Navigate through the report, making note of the Document Types the Service Rep does not have access to

within Beyond.

- Determine if there is an existing Security Group that contains the related Document Type permissions that the Service Rep can be added to.
 - If not, create a new Document Type Security Group with the intended permissions (instructions below).

Creating Document Type Security Groups

This section details how to create and add users to Document Type Security Groups within both Enterprise and Beyond.

Note When managing Security Groups, you will always see the following default Document Type Security Groups:

- **TempWorks Default - All Access:** Can Read/Write all Document Types.
- **TempWorks Default - No Access:** No Access to Document Types.
- **TempWorks Default - Read Only - All:** Can View all Document Types.

The above defaults are always available to utilize. If you want more manual control over what documents are accessible, you can create your own Document Type Security Groups (as outlined below).

Enterprise

Navigate to All Options > Administration > Security > Select "Document Type Security Groups" from the dropdown:

The screenshot displays the Enterprise Administration interface. The left sidebar contains a navigation menu with categories like 'interview questionnaire', 'job title', 'message', 'multiplier code', 'owner', 'personal access tokens', 'required document', 'sales pipeline status', 'sales team', 'sec roles', 'security' (highlighted), 'service rep', 'tag type', 'task admin', 'timeclock punches', 'web user account', 'worker comp code', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', 'calendar', 'reports', and 'all options'. The main content area is titled 'Administration' and shows a search bar with the text 'Search for Employees, Customers, Orders, etc.'. Below the search bar, there's a message: 'No tasks to display for your current filter settings'. The 'Document Type Security Groups' dropdown is highlighted in red. The 'security' section is expanded, showing a list of document type security groups. The 'document types' section shows 55 document types with columns for 'Can Read', 'Can Write', and 'Can Delete'. The 'members' section shows a list of users with columns for 'Rep Full Name', 'Active', and 'Srident'.

Administration

Search for Employees, Customers, Orders, etc.

JOSHUA.KRAMER: System

No tasks to display for your current filter settings

tasks appointments social email

Document Type Security Groups

Find a document type security group

All Access Document Type

An Optimus Document Type

Brandon's Document Types

Darek Document Type

doaa

Hierarchy

High Tech NE Branch

High Tech Staffing SubSystem

QA Automation - All Access

QA Automation - No Access

QA Automation - Read Only - All

Read Only

TempWorks Default - All Access

TempWorks Default - All Access OSP

TempWorks Default - No Access

TempWorks Default - Read Only - All

Testing Document Types

16 items available

security group

Name: All Access Document Type

Description: Permission-Admin permission

Hierarchy: System

document types

55 document types. Read:24, Write:24, Delete:24

Document Type	Can Read	Can Write	Can Delete
(new)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acknowledgement Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applicant Portal Resume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Care Now Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

members

Rep Full Name	Active	Srident
Administrator.	<input type="checkbox"/>	14
Aleks2	<input checked="" type="checkbox"/>	30314
Alex Binenstock	<input type="checkbox"/>	23066
Amelia Stout	<input checked="" type="checkbox"/>	23309
andrew grout2	<input checked="" type="checkbox"/>	30331
andrewRC groutRC	<input checked="" type="checkbox"/>	30350

Select the "+" at the top right corner to create your own Document Type Security Group:

Administration

Search for Employees, Customers, Orders, etc.

JOSHUA.KRAMER: System

No tasks to display for your current filter settings

tasks appointments social email

16 items available

security group

Name: All Access Document Type

Description: Permission-Admin permission

Hierarchy: System

document types 55 document types. Read:24, Write:24, Delete:24

Document Type	Can Read	Can Write	Can Delete
(new)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acknowledgement Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applicant Portal Resume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Background Check	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Care Now Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

members

Rep Full Name	Active	Srident
Administrator.	<input type="checkbox"/>	14
Aleks2	<input checked="" type="checkbox"/>	30314
Alex Binenstock	<input type="checkbox"/>	23066
Amelia Stout	<input checked="" type="checkbox"/>	23309
andrew grout2	<input checked="" type="checkbox"/>	30331
andrewRC groutRC	<input checked="" type="checkbox"/>	30350

Within the "Create New Security Group" window, enter/select the following:

- **Hierarchy:** The hierarchy level where the Document Type Security Group will be accessible
- **Name:** The name of the Document Type Security Group
- **Description:** The description of the Document Type Security Group
- **Permissions:** Select the "Can Read", "Can Write", and/or "Can Delete" permissions for each document type you'd like to include.

Once complete, select "Save" to create the Document Types Security Group:

?

X

create new security group

Security Group Type

Document Type

Hierarchy

High Tech Staffing

Name

Testing Document Types

Description

Testing Document Types

Select document types to be included in the new security group

Document Type	Can Read	Can Write	Can Delete
(new)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acknowledgement Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Applicant Portal Resume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Background Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Care Now Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CIA Result	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Confidentiality Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contract	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

0

!

X Cancel

Save

Once saved, navigate to the newly created Document Type Security Group and select the "+" within the "Members" section:

Administration

Search for Employees, Customers, Orders, etc.

JOSHUA.KRAMER: System

No tasks to display for your current filter settings

tasks appointments social email

16 items available

security group

Name: Testing Document Types

Description: Testing Document Types

Hierarchy: High Tech Staffing

document types

55 document types. Read:7, Write:7, Delete:2

Document Type	Can Read	Can Write	Can Delete
(new)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Acknowledgement Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Applicant Portal Resume	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Background Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Care Now Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

members

No Records Found

Within the "Add Member to Security Group", select the appropriate user from the dropdown, and select "Save" to add the user:

add member to security group

Security Group Type: Document Type

Name: Testing Document Types

Description: Testing Document Types

Select a service rep to add to this security group: Abaarta Abaarta

0

Cancel Save

Note In the event you attempt to add a user who is a member of a different Document Type Security Group, you will receive the following message:



Note Within Enterprise, users are added to Security Groups one by one. Repeat the above step for any additional users that need to be added to the Security Group.

For more information on creating Security Groups within Enterprise, please see the following article titled [Enterprise - Security Group Administration](#).

Beyond

Navigate to B Menu > System Settings > Security > Document Types:



Select the "+" at the top right corner to create your own Document Type Security Group:

Document Type security groups are used to grant service representatives read, write, and delete permissions for different documents document types. Note that service reps may be a member of only one of this type of security group.

Name	Description	System Default	Hierarchy
Filter...	Filter...	Filter...	Filter...
TempWorks Default - All Access	Can Read/Write all Document Types.	✓	System
TempWorks Default - No Access	No Access to Document Types.	✓	System
TempWorks Default - Read Only - All	Can view all Document Types.	✓	System
All Document Permissions	All Document Permissions	⊕	System
All Document Types	All Document Types	⊕	System
DEMO USERS - TRAINING	DEMO USERS - TRAINING	⊕	System

Within the "Document Types Security Group" window, enter/select the following:

- **Name:** The name of the Document Type Security Group
- **Hierarchy Level:** The hierarchy level where the Document Type Security Group will be accessible
- **Description:** The description of the Document Type Security Group
- **Permissions:** Select the "Can Read", "Can Write", and/or "Can Delete" permissions for each document type you'd like to include.
- **Members:** Select the appropriate users to be added to this Document Type Security Group.

Once complete, select "Submit" to create the Document Types Security Group:

Document Types Security Group

* Name

Testing Document Types

* Hierarchy Level

High Tech Staffing

▼

* Description

Testing Document Types

Permissions (55)

11 Can Read 11 Can Write 3 Can Delete

🔍 Filter...

(new)	<input type="checkbox"/> Can Read	<input type="checkbox"/> Can Write	<input type="checkbox"/> Can Delete
Acknowledgement Form	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input type="checkbox"/> Can Delete
Applicant Portal Resume	<input type="checkbox"/> Can Read	<input type="checkbox"/> Can Write	<input type="checkbox"/> Can Delete
Assessment	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input checked="" type="checkbox"/> Can Delete
Background Check	<input checked="" type="checkbox"/> Can Read	<input checked="" type="checkbox"/> Can Write	<input type="checkbox"/> Can Delete
Care Now Report	<input type="checkbox"/> Can Read	<input type="checkbox"/> Can Write	<input type="checkbox"/> Can Delete
CIA Result	<input type="checkbox"/> Can Read	<input type="checkbox"/> Can Write	<input type="checkbox"/> Can Delete

Members (1)

+

🗑️ joshua.kramer (23091)

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Note For more information on creating Security Groups within Beyond, please see the following article titled [Beyond - Managing Security Groups](#).

Troubleshooting

In the event users are not a member of a Document Type Security Group, they may encounter the following issues when attempting to view documents within TempWorks products:

Beyond/Enterprise

- Issue: Unable to view documents within the "Documents" tab.

- Error: "An established connection was aborted by the software in your host machine."
- Error: "You do not have permission to create or modify documents with a Document Type ID of ###."
- Error: "Documents could not be retrieved. Enterprise cannot communicate with the TempWorks Open API. The API configuration information is missing."
- Warning: Your security groups do not allow access to any document types. Please contact your administrator:
 - This warning can be received when attempting to upload a document within Enterprise/Beyond.
 - To fix, ensure the Document Type has been added to an intended Document Type Security Group as outlined within the steps of this article.

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