

General Troubleshooting Guide

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Overview

In this page, we are going to walk through some basic questions and ideas to consider when working with a perceived issue in the software.

Most problems presented to you are probably one of three categories:

- I Can't See Something
- I Can't Do Something
- I'm Getting an Error Message

This article will help you figure out where to start to understand where these issues might be coming from and how to fix them within TempWorks systems.

I Can't See Something (Hierarchy)

When you find yourself in a situation where you can't find something or your unable to view the same data as the colleague next to you, this may be due to a change in hierarchy.

Note For more information on how hierarchy functions within TempWorks software, please see the following articles:

- [Beyond - Hierarchy](#)
- [Enterprise - Hierarchy](#)

Records

Records in our system include Employee, Customer, Contact, Order, Assignment, Prospect, Checks, and Invoices. They can be defined as all items that are created by user interaction and are affected by hierarchy.

In the event you can see all my employee records except employee "XYZ", or you are unable to find any of the customer records you had created yesterday, this may be due to an issue with hierarchy.

Consider the following information:

- What are the names/IDs of the records that you can't see?
- What Hierarchy Level are you currently at within the software?

- How are you searching? (Universal Search, in Enterprise, in Beyond, etc.)

Note You can also set your searches to look for all records, not just "Active" or "Inactive".

Reports/Buttons/Sections of Software/Fields

If you are unable to see a report, button, module, field, etc. it's not likely a hierarchy issue but more so a permissions issue. This will be covered within a later section of this article.

For reports, if the issue is that you're not seeing the intended numbers on a report, this may be a hierarchy related issue.

Note Reports show data and information related to records. If you are not at the intended hierarchy, or have the correct parameter selected, you may not be viewing the intended records within that report.

Documents

Documents are one of the few items that look at **both** security **and** hierarchy in order to be able to view them within the software.

The hierarchy in which a document is saved can affect who has the ability to see it. However, there are also permission settings by document type. Therefore, it is important to ask the question "Am I only unable to see **one** document or am I unable to see **all** documents?" before diving into the potential issue.

I Can't Do Something (Security, Licensing, and Configurations)

When you run into an issue where a button isn't visible, you're unable to see an option on a list, or an integration isn't available to set up in administration, these may be related to security permissions, licensing, and/or configuration setup.

TempWorks systems have three main ways to determine who can do what within the software:

- Security
- Licensing
- Configs

Security

Permissions determine what each user has access to do in TempWorks systems, and the user's permissions are based on the software that is being accessed, including Beyond, Enterprise, WebCenter, etc.

Please view the following video for more information on the security options within Beyond and Enterprise:

Security Roles (SecRoles)

For Enterprise, Security Roles control most permissions for each user.

When troubleshooting, you can ask yourself, "Is there another user that can do what I need to do or have the permissions that I am looking for?" In the event there is, TempWorks Support can compare you and the other users Security Roles/Permissions and help determine what exact permissions is needed.

Note For more information on Security Roles within Enterprise, please see the article titled [Enterprise - Security Roles](#).

Enterprise and Security Groups

Normally, Security Roles are for Enterprise and Security Groups are for Beyond but with the utilization of the TempWorks API, there is some overlap in permissions. The TempWorks API typically utilizes Security Group permissions which means that some integrations, including E-Verify in Enterprise, will utilize Security Group permissions to send information to an integration partner.

Note The related integration Knowledge Base article(s) will state the type of permissions required, including Security Roles, Security Groups, and/or Licensing.

Security Groups

Security Groups control permissions in Beyond.

The idea behind security groups is to first group your users that need the same access and then set permissions to all of them at the same time.

When troubleshooting, you first need to determine what kind of security issue is occurring:

- Are you unable to access a document?
- Are you unable to log a message on a specific type of record?
- Is this a general issue with permissions?

Note Knowledge Base articles related to features within the software will state whether, if any, specific Security Group permissions are required.

For more information on Security Group management in Beyond, please see the following articles:

- [Beyond - Managing Security Groups](#)
- [Beyond - Creating Security Groups with Advanced Permissions](#)

Web User Roles

Web User accounts are used for HRCenter, WebCenter, and Buzz.

In the event you require access to HRCenter **Admin** or WebCenter **Admin**, you will need a **Service Rep** Web User account.

Web User accounts do have roles to limit can be accomplished within WebCenter, so in the event a user is unable to impersonate a user, etc. Web User Role permissions will need to be investigated within WebCenter Admin.

Note For more information on Web User management, please see the following articles:

- Beyond
 - [Beyond - Managing Web User Account](#)
 - [Beyond - Creating a Web User Account for a Contact Record](#)
- Enterprise
 - [Enterprise - Manage Web User Account](#)
 - [Enterprise - Managing Service Rep Web User Accounts](#)
 - [Enterprise - Creating a Web User Account for a Contact Record](#)

Licensing

Integrations, modules, additional features, etc. require Licensing to determine access by the user.

Features behind licensing often require additional contracts or payment agreements before they are enabled. Please reach out to your TempWorks Account Manager for further assistance.

Configurations

Configurations, or configs, can change what options are available in a system and how certain options behave. When troubleshooting a potential issue, if you've ruled out security permissions and licensing, it's time to check the configs.

WebCenter configs and rules are managed within WebCenter Administration and effect TimeClocks, On-Site Time Clock App, Buzz, Job Board and WebCenter respectively.

When troubleshooting issues related to configs & licensing, ask yourself the following:

- Can anyone access this option?
- Have you had this feature working before?
- Have you talked with your TempWorks Account Manager about this integration?

Note For more information on config and role management, please see the following articles:

- Buzz & On-Site TimeClock App
 - [Buzz - Buzz Specific WebCenter Configurations](#)
 - [On-Site Time Clock Configuration Options](#)
- Job Board
 - [Job Board - Posting Options & Configurations](#)
- WebCenter
 - [WebCenter Admin - Intro to Configurations](#)
 - [WebCenter Admin - Setting up WebCenter Roles](#)
 - [Admin Portal - Employee Roles and Configs](#)
 - [WebCenter and Contact Roles](#)
 - [WebCenter Admin - Configuring Order Candidate Review for Customer Contacts](#)

I'm Getting an Error Message (Retracing

Steps)

When you're presented with an error message, you may not be sure where to start. Here are a few recommendations that may help.

Refreshing the System

Sometimes software and technology are unpredictable or they just get stuck.

The first thing you should try to do is refresh the system to see if that fixes the error. This can be accomplished via the following methods:

- Refreshing your Hierarchy
- Closing/Re-Opening the Software
- Clearing the Web Browser Cache

Refresh Hierarchy

If you are encountering issues in Enterprise, always attempt to refresh hierarchy first.

- Navigate to the Hierarchy selector option by selecting the username at the top
- Select "Next"
- Select "Finish"

Note The above instructions only work within Enterprise. Re-selecting your hierarchy option in Beyond doesn't refresh the system the same way.

Closing/Re-Opening the Software

In the event refreshing your hierarchy does not resolve the issue, you can then attempt to close and reopen the software.

- **Enterprise**
 - Close and reopen the software
- **Beyond/HRCenter/WebCenter**
 - Log out of the application
 - Close and reopen your web browser
 - Log back into the application
- **Buzz/On-Site TimeClock Application**
 - Force-close the application on the mobile device
 - Reopen the application

Clearing Browser Cache

If you are working within Beyond, HRCenter, WebCenter, or the Job Board, clearing your web browser cache can help alleviate potential issues.

This can be accomplished via the following methods:

- **Beyond:** Has a clear cache and/or preferences option via B Menu > User Settings > Data Cache > "Clear Cache"
- **Buzz:** Has a clear data option under the Profile Menu > "About this App"
- **HRCenter:** Has a "Refresh Cached Data" button on the dashboard
- **Web Browser:** Each web browser will have a clear cache/cookies option usually under "History":
 - [Chrome](#)
 - [Edge](#)
 - [Firefox](#)
 - [Safari](#)

Reproduce the Error

If a quick refresh doesn't resolve the issue, it's time to retrace the steps that got you here.

- Which software and what area of the software did the error occur in?
 - Integrations, additional features, etc. should warn you to check that licensing, configs, and security were correctly set up
- Understand what steps have been taken to get the error message.
- Look for key words within the error message:
 - "Permission" = Security roles/groups issue
 - "Can't find" = Something hasn't been setup/configured as intended
 - "API" = Security Groups, Integration setup, Personal Access Token permissions, etc
- Follow the same steps and attempt to get the same error.
 - Also note if multiple people are getting the same error. If you can reproduce it, that typically means there is something wrong with the system itself. Maybe something was missed during the setup of a feature or integration. Maybe the integration partner is currently experiencing down time, etc.

If you are unable to reproduce the error, it's time to log out and log back in to the software or force-close the application and re-open it.

Note Please contact [TempWorks Support](#) for further assistance.

Related Articles