

Onboarding - Syncing Data Between Beyond and the Onboarding Portal

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Overview

The TempWorks integration within the Onboarding Portal is primarily one-directional. Beyond is the system of record for the data, and the Onboarding Portal pulls that data in to drive onboarding tasks. A smaller set of data is then sent back to Beyond including:

- Completed forms as PDF documents on the employee record
- Task status as onboarding actions
- Employee profile updates collected during onboarding

Data that Syncs to the Onboarding Portal

Note Please see the article titled [Onboarding - Terminology](#) for a table that highlights verbiage that is used within the Onboarding Portal and their relation to TempWorks Software.

Employee/Candidate

- First Name
- Middle Name
- Last Name
- Phone Number
- Email Address
- Address
- The TempWorks Employee ID and Branch ID are stored as Custom Attributes so they can be referenced in field mappings and onboarding actions.

Customer/Client

- Customer Name
- Customer ID

Job Order/Job

- Job Title
- Worksite Address
- The TempWorks Job Order ID is stored as a Custom Attribute.

Employer

- Employer Name
- Legal Name
- FEIN
- Phone Number
- Address

Assignment/Placement

- An assignment ties an employee to a customer, job order, and employer. When syncing an assignment, it chains through all four entities, syncing the employee, client, job, and employer if they haven't been synced yet, then creates a Placement record that links them together.

Field Mappings

- Field Mappings determine exactly which fields in Beyond map to which field paths within the Onboarding Portal.
- Default mappings cover the standard fields for all five entity types.
- You can add custom mappings to pull in additional fields. For example, mapping a custom data field to a Custom Attribute within the Onboarding Portal.

Data that Syncs to Beyond

Onboarding Actions (Tasks)

- Every task created, updated, or deleted in within the Onboarding Portal is synced to Beyond as an Onboarding Action.

Completed form PDFs

- When an employee completes a form that has a document mapping configured, the completed form is then uploaded to the employee's profile within Beyond as a PDF.

Employee Profile Updates

- When an employee updates their personal information through a form, those changes are pushed back to their employee record within Beyond.

- The following employee fields are synced automatically to Beyond:
 - First Name
 - Last Name
 - Middle Name
 - Address
 - Email Address
 - Phone Number
 - SSN
 - Date of Birth
 - Branch

Note Field Mappings is separate from the above list and **do not sync back to Beyond** from the Onboarding Portal.

Note Employee profile information is **only** updated within Beyond once an onboarding task has been completed, such as submitting a finished form.

For example, updating an employee's phone number or address manually within the Onboarding Portal will **not update** that same field within Beyond.

Note In the event you want additional fields to be synced back to Beyond from the Onboarding Portal, you will need to create an Automation.

Please see the article titled [Onboarding - Logging an Employee Message in Beyond via Automation](#) for an example on how to create an Automation that syncs additional information back to Beyond.

Related Articles
