

Defining Profiles

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What are Profiles?

A Profile in Wurk is a set of rules that can be applied to many employees and situations. For example, within each job description defined for your company, you can assign various *profiles*, such as for whether the employee is eligible for benefits or holiday pay, or the type of work schedule they follow (like for a grow site with 24-hour days versus an office with 9am-5pm hours).

These profiles are essentially shortcuts for defining what the employee can see and do in Wurk, and for what their managers and HR and payroll specialists can do for them in Wurk. Another way to think of Profiles is "defaults": each profile can preset aspects of the employee's Wurk information and be reused again and again for each new hire. Once you pull in defaults from a profile to an employee record, you can then edit those settings to customize them for that employee.

Profiles can be set at the EIN level, the Cost Center level, or the Job level. That means that if a Holiday profile has been applied, for example, to a Cost Center, those holidays will apply to everyone in that Cost Center. To make an exception, you would have to edit the specific employee's job description.

When setting up your Wurk system, your Implementation consultant defines these based on your specifications and business needs. To see the profiles defined for your company, you can navigate to any job description and click the dropdowns in the Profiles (Defaults) section. This shows you all the profiles defined for your company.

If you need to add more or change the ones set up for you (for example, if your business grows and you find that your hiring managers are having to make lots of repetitive edits to the defaults carried over from your profiles), contact your Wurk Account Manager to request updates. Note, however, that **Pay Period Profiles** are designed to simplify the process of hiring salaried versus part-time employees, and requesting additional Pay Period Profiles may cause duplicate or conflicting timesheets.

What are *Security* Profiles Used For?

Security Profiles control what your users can see and do in Wurk, including the menu options that display for them on the main menu. During implementation, these profiles are associated with users who have access to your system. For example, a Department Manager will have access to managerial functions like reviewing timesheets, but not administrative ones like controlling other users' security access. Shown below are the typical security profiles built into most Wurk systems.

Defaults

PROFILES			
ACA	<input type="text"/>		01/01/2012
Access	<input type="text"/>		
Accruals	<input type="text"/>		
Benefit	<input type="text"/>		12/31/1900
Competency	<input type="text"/>		
Counter Distribution	<input type="text"/>		12/31/1900
Demographic	<input type="text"/>		
Employee Perspectives	<input type="text"/>		12/31/1900
Holiday	<input type="text"/>		
Labor Distribution	<input type="text"/>		
Leave of Absence	<input type="text"/>		
New UI Dashboard Layout	<input type="text"/>		12/31/1900
Pay Calculations	<input type="text"/>		12/31/1900
Pay Period	<input type="text"/>		
Pay Prep	<input type="text"/>		12/31/1900
Performance Review	<input type="text"/>		
PST Population	<input type="text"/>		
Retirement Plan	<input type="text"/>		
Security	<input type="text"/>		
Succession	<input type="text"/>		
Time Off Planning	<input type="text"/>		
Timesheet	<input type="text"/>		
TG Auto Population	<input type="text"/>		
Training	<input type="text"/>		
Workday Breakdown	<input type="text"/>		12/31/1900
Work Schedule	<input type="text"/>		
Working Time Regulations	<input type="text"/>		12/31/1900

Click here to see your company Security Profiles

Security profiles not only control what users see on the main menu, but also the dashboards they have access to.

Dashboards for Managers and Administrators

If you are an administrator or manager, you will see tabs along the top of the Home page in Wurk, which may include items highlighted below. Each tab contains dashboards for that module of Wurk. You may have permissions to customize your dashboards, meaning that you can add charts you have created to your dashboard for faster at-a-glance views.

The screenshot shows the WURK dashboard for user Both Bowman (123). The dashboard is divided into several sections:

- Header:** Includes the WURK logo, a search bar, and a navigation menu with tabs for Home, My Dashboard, Team, Time, Accruals, Benefits, HR, Learning, Payroll, and Recruitment. A note above the tabs states: "Tabs like these only display for managers and administrators based on security profiles. You can also find each one as a Dashboard sub-menu item under the Team menu (for example, Team>Time>Dashboard)".
- User Profile:** Displays the user's name "Both Bowman (123)" and hire date "Hire Date: 01/01/2016 (4 Years, 1 Month, 27 Days)".
- Clock:** Shows the current time "12:38 PM" on "Friday, Feb 28" in the "[Mountain]" time zone. It includes buttons for "CLOCK IN", "CLOCK OUT", and "CHANGE COST CENTER".
- My Pay:** Displays a message "Whoohoo, today is pay day!" and a "View Pay History" link.
- Time Statistics:** Shows "0.00 HRS PERIOD TOTAL".
- Timesheet Chart:** A bar chart showing hours worked over time, with a y-axis labeled "hours" ranging from 0 to 10.
- My Benefits:** Displays a warning "You have no benefit profile" and a "View Benefits" link.
- Recruitment:** Shows "6 Open Requisitions" and "5 Requisitions Without Applicants". It includes a table with the following data:

Category	Count
New Applicant	0
Application Received	1
Pre-Screen Applicant	0

From these dashboards (and/or your Saved Reports), you can open one of the dashboard tabs and click-through on the title of the chart. This will take you to the report that was the source of the chart. From there, you can create your own charts to show on your dashboards.

The most important security roles to understand are the ones you assign to your managers and employees. When a user in WURK has a manager role, he or she can then be assigned to users with employee roles. This might mean the manager can see the employee's profile and make changes to things like the employee's personal info, pay, deductions, benefits, and so on. As an administrator, as the managers in your company move and change positions, you will need to reassign them to employees. Re-using a Security Profile for each type of manager your company has, with its preset permissions and responsibilities, helps you do this more efficiently and then you always know what that manager can and cannot do and see in WURK. To build familiarity with the standard profiles built into WURK, see [Understanding Security Profiles](#).

JB

würk MY TEAM

Employee Information

HIRE TERMINATE REHIRE VIEW SELECTED

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Columns (1) (1)

	Employee Id	Badge	Username	First Name	Last Name	Employee Et
<input type="checkbox"/>	1		AFang81	Alexander	Fang	Sublime Mac
<input type="checkbox"/>	10		DPham69	David	Pham	Sublime Mac
<input type="checkbox"/>	103		EMutter63	Evan	Mutter	Sublime Mac
<input type="checkbox"/>	104		TRobbins60	Talia	Robbins	Sublime Mac
<input type="checkbox"/>	105		DJordan37	DeShawn	Jordan	Sublime Mac
<input type="checkbox"/>	107		JMeehan89	Joseph	Meehan	Sublime Mac
<input type="checkbox"/>	108		ATEixeira93	Andre	Teixeira	Sublime Mac
<input type="checkbox"/>	109		WSaroyan01	William	Saroyan	Sublime Mac
<input type="checkbox"/>	11		DThompson64	Davin	Thompson	Sublime Mac
<input type="checkbox"/>	112		KSommer92	Kennan	Sommer	Sublime Mac

My Team
Dashboard
Employee Information
Time
Accruals
Schedule
Benefits
HR
Learning
Payroll

Select an employee to view or edit