

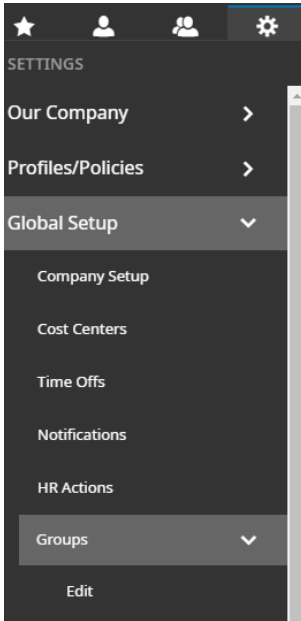
Understanding Work Groups

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START HERE

You can create any number of groups to help organize personnel and management responsibilities. The steps below guide you through Groups so you can work with these on your own.

1. Navigate to Admin Setting > Global Setup > Groups. Click Edit to see your Groups.



2. Edit or delete an existing group or create a new one. Review below before proceeding:

Learn More About Groups...

- Groups have members and managers. Members are the people in the group. The *group* manager simply oversees the group in Wurk (but does not have to be an actual manager by title at your company). This person has access to the employee records of the group members. Some groups do not have managers. These are used for reporting, messaging, and so on, instead of for granting access to people's records.
- "Manager" groups: the pre-installed groups, Manager 1 and Manager 2, are set up for your company during implementation. When we set up your employees in Wurk, we use these "slots" to assign organizational managers to them. You can then adjust and change people who are in these two groups to quickly give them access to employee information, and you can rename these groups to something more meaningful, such as "Grow Manager" and "Office Manager." Groups that do not have the X next to them in the list cannot be deleted and are created during
- Groups without organizational managers and manually created groups: aside from the "Manager"

groups above, you can also create your own groups to grant access to employee information for non-Managers, for example,

- A Payroll Clerk is not a manager of anyone, but needs to see all Full-Time non-executives to process their payroll. A manually created group can be created for this situation, filtered to pull in full-time non-executives, with the Payroll Clerk assigned as the manager of the group. This enables the clerk to view and edit their information.
- A VP of a whole area has five employees (over which they are Manager 1 or 2), but needs to see more employees outside of those five. By manually creating a special group By Department for this team, the VP can be assigned to see additional employees.
- Wurk also has a group set up for your entire Company, and whenever you hire new employees, they are automatically added to that group. This enables you to report on and see information for everyone in the company.
- Filter-based groups bring in people by using filters, such as Job title or Department. These will not allow you to manually add people to the group.

3. Open an existing, non-filtered group in Edit mode to get familiar with the settings within a group.

The screenshot displays the 'Edit Group' interface. On the left, the 'Group Members' section shows a table with 3 rows of members. The 'Auto Add New Accounts' checkbox is checked. The main area shows a list of 'Members Not In the Group' with a table of employee details.

Group Members Table:

Employee Id	First Name	Last Name	Emp
00128	Kenton	Clarkson	D&D
00127	Lauren	Dubois	D&D
00122	Katie	Waters	D&D

Members Not In the Group Table:

Employee Id	First Name	Last Name	Employee EID
engin-25	Jason	A.	Second D&D
engin-37	Heather	A.	Second D&D
engin-32	Justi20	Admin20	Second D&D
1002	Engin	API	D&D
engin-12	Jesse	B.	Second D&D
123	Beth	Bowman	D&D
113	Joshua	Brown	D&D
engin-10	Kristie	C.	Second D&D
engin-16	Peter	C.	D&D
engin-27	Lane	C.	D&D
engin-38	Stephanie	C.	D&D
development_engin-179	Briante	C.	D&D

If you select the Auto Add New Accounts option in the upper left area of the first screen, this means that any new employees will be automatically added to this group.