HUMAN RESOURCES:
ADD A NEW WORKGROUP MEMBER

Provides guidance for adding a new Workgroup Member in FC Desktop. Note all Workgroup Members will have the ability to charge labor via Job Cost in Facilities Connect.

▼ GETTING STARTED

Once a new employee has been added to Facilities Connect, they can be added to a Facilities Connect Workgroup, and Labor Rate information can be applied. If a new employee is not visible and you are unable to complete the steps outlined in this job guide, please contact NUIT for assistance.
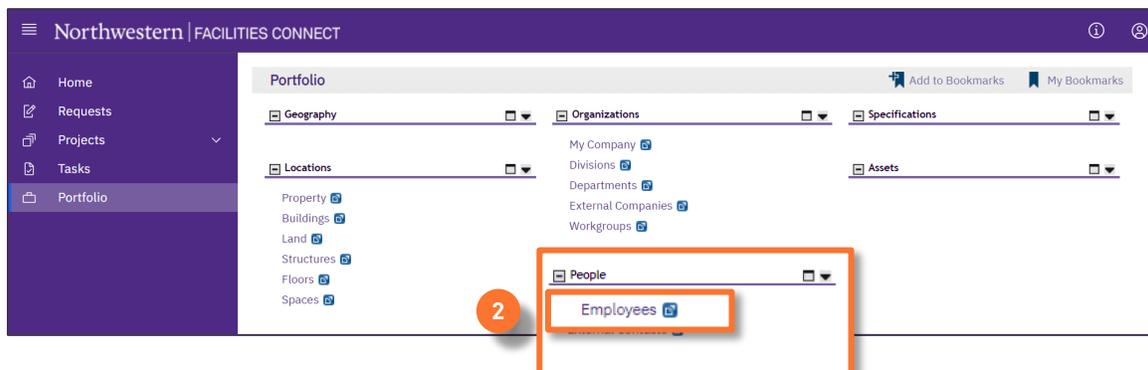
DIRECTIONS:

1 From the Facilities Connect homepage, locate the hamburger menu:

1 Click on the **Portfolio** section.
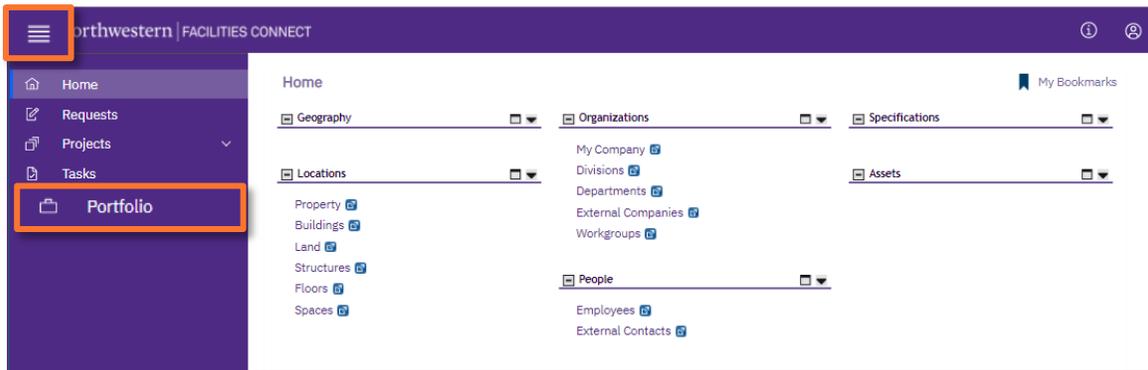
2 Locate the **People** section:

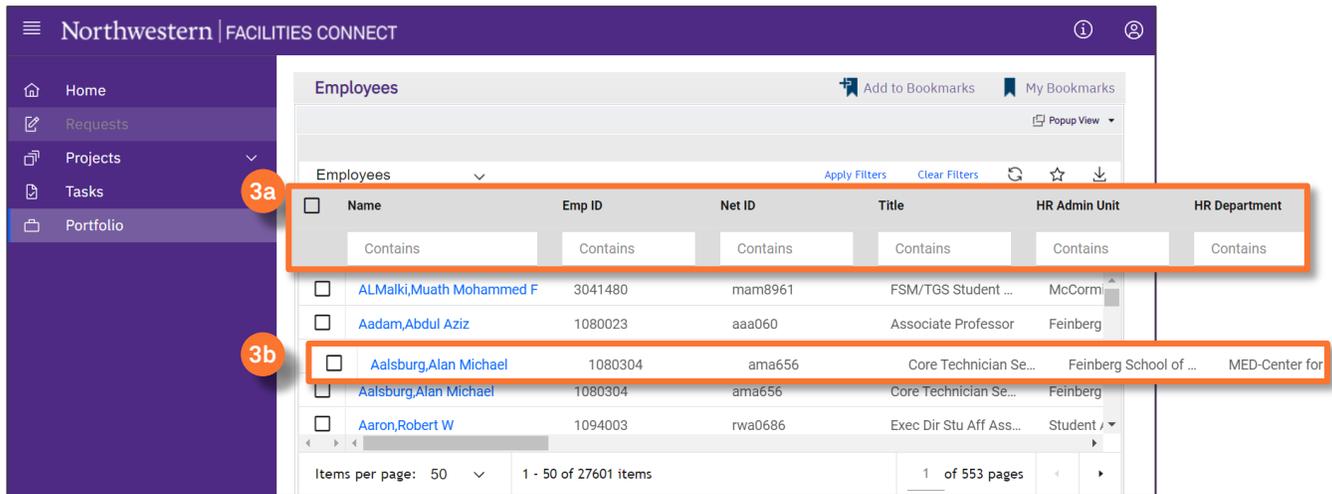**2** Click on the **Employees** option.

HUMAN RESOURCES:
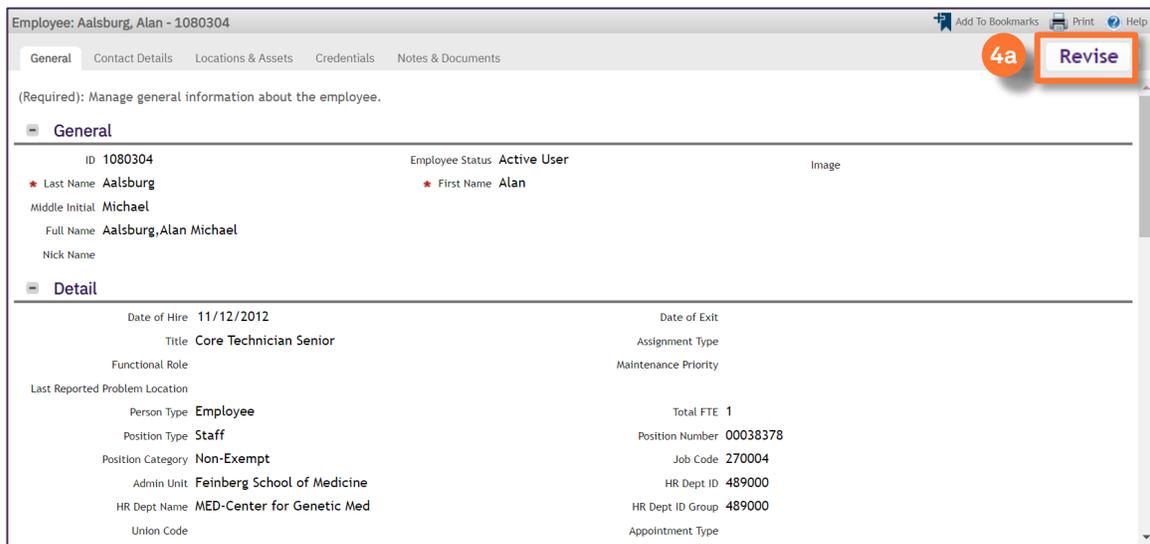# ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

3 Upon clicking, the **Employees** screen will open:

3a Use the available **Search Fields** to locate a specific employee.

3b Once located, click anywhere on the **Employee Record** line to open.

4 Upon clicking, the **Employee Record** will open in a new window.

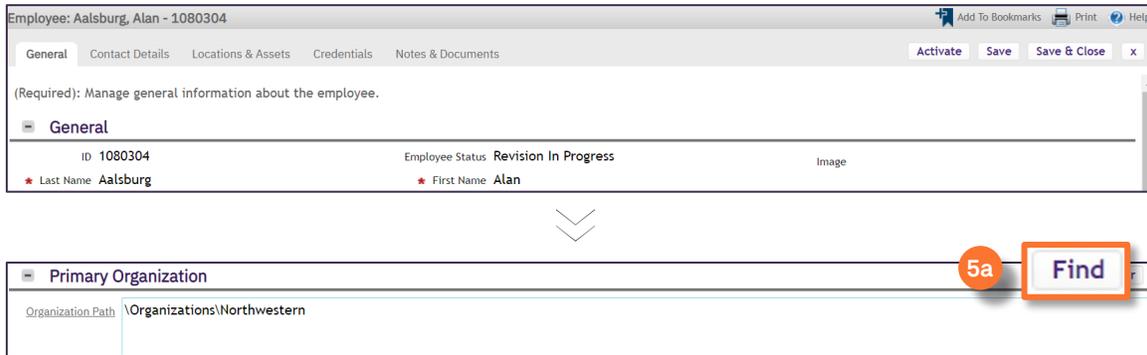**4a** Click the **Revise** button to edit the employee record.
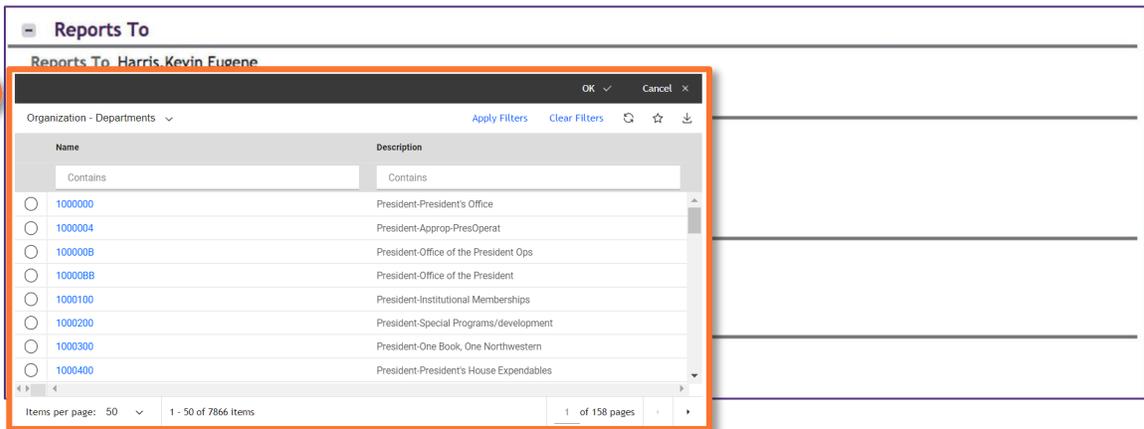
HUMAN RESOURCES:
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

5 First, update the employee's **Primary Organization**:

5a Scroll down the record and locate the **Primary Organization** section; click on the **Find** button to search available organizations.
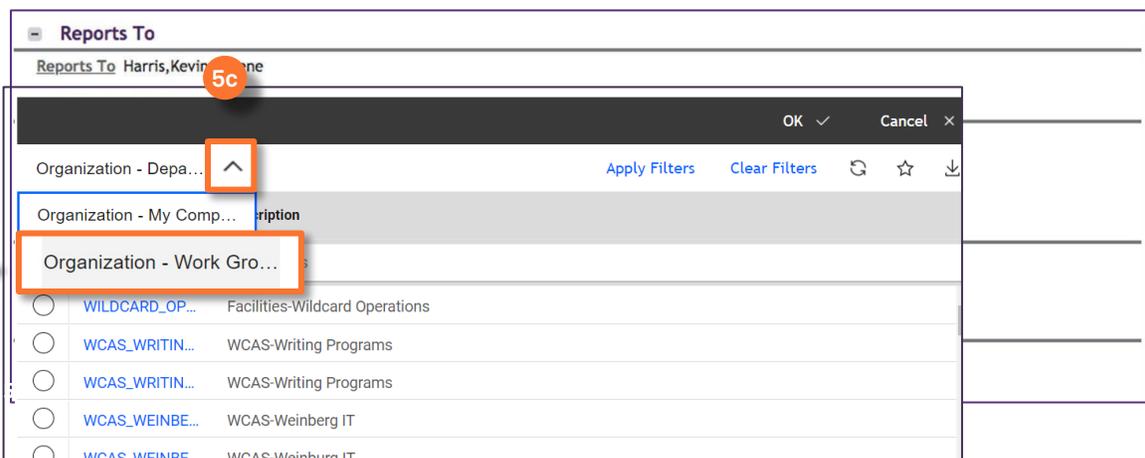

5b Upon clicking, the **Organization** selection window will pop-up inside the Employee Record.

5c Next, use the drop down arrow to search for the desired Workgroup.

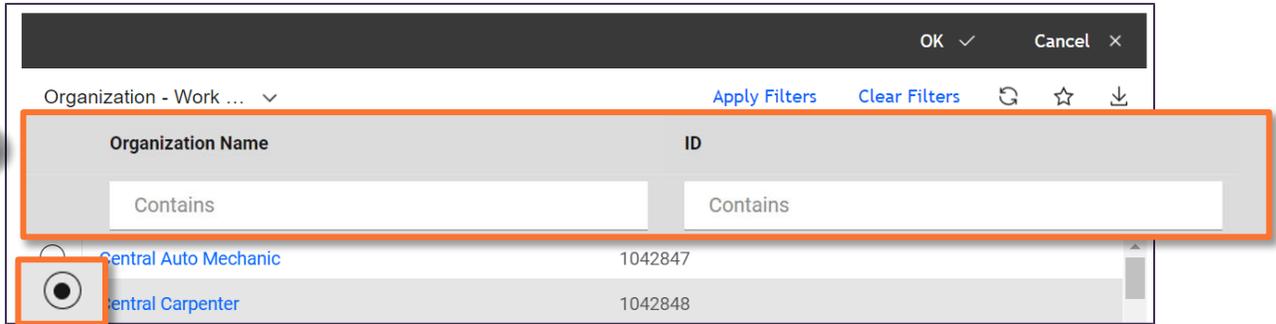**5d** Select the **Work Groups** option from the drop-down menu.
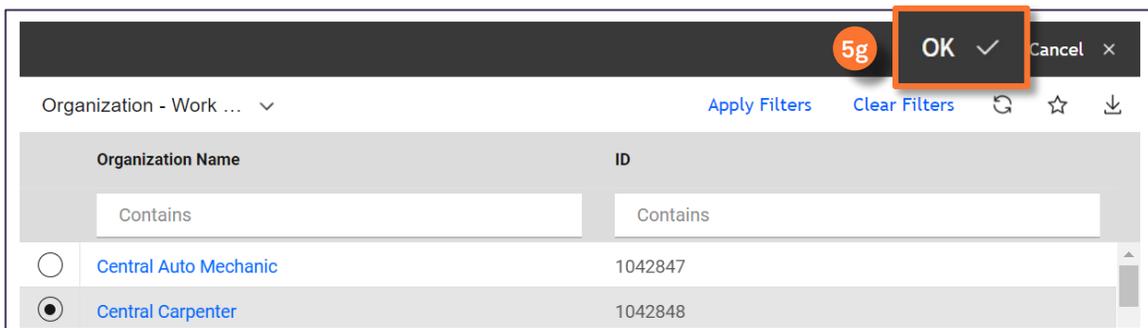
HUMAN RESOURCES:
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

5 Update the **Primary Organization** (continued):

5e Use the available **Search Fields** to locate the desired Workgroup.

5f Click on the **radio** button beside the Workgroup to select.

	OK ✓	Cancel ✕
Organization - Work ... ⌄	Apply Filters Clear Filters	↻ ☆ ⬇

Organization Name	**ID**
Contains	Contains

	Central Auto Mechanic	1042847
⦿	Central Carpenter	1042848

5g Click the **OK** button to confirm and save the updated Workgroup.

	5g OK ✓	Cancel ✕
Organization - Work ... ⌄	Apply Filters Clear Filters	↻ ☆ ⬇

Organization Name	**ID**
Contains	Contains

◯	Central Auto Mechanic	1042847
⦿	Central Carpenter	1042848

▼ INFORMATION

Repeat Steps #5e-5g to add the Employee to any additional Workgroup(s) as needed.
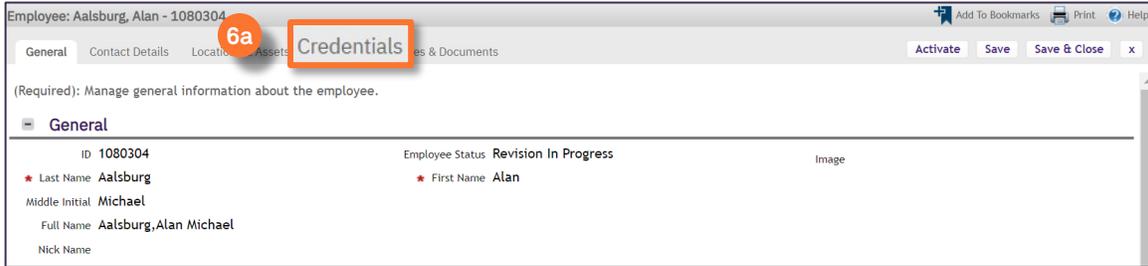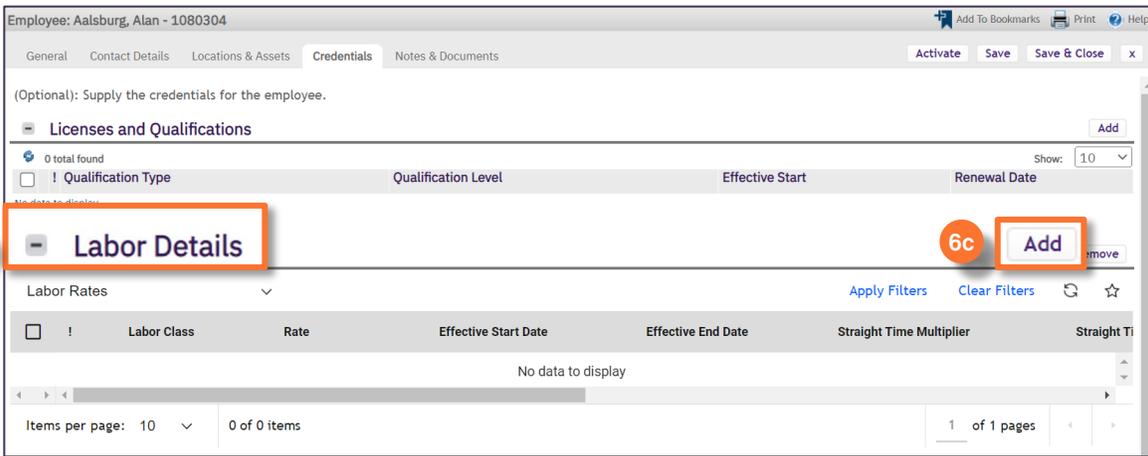
HUMAN RESOURCES:
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

6 Next, confirm the **Labor Rate and Fiscal Year**:

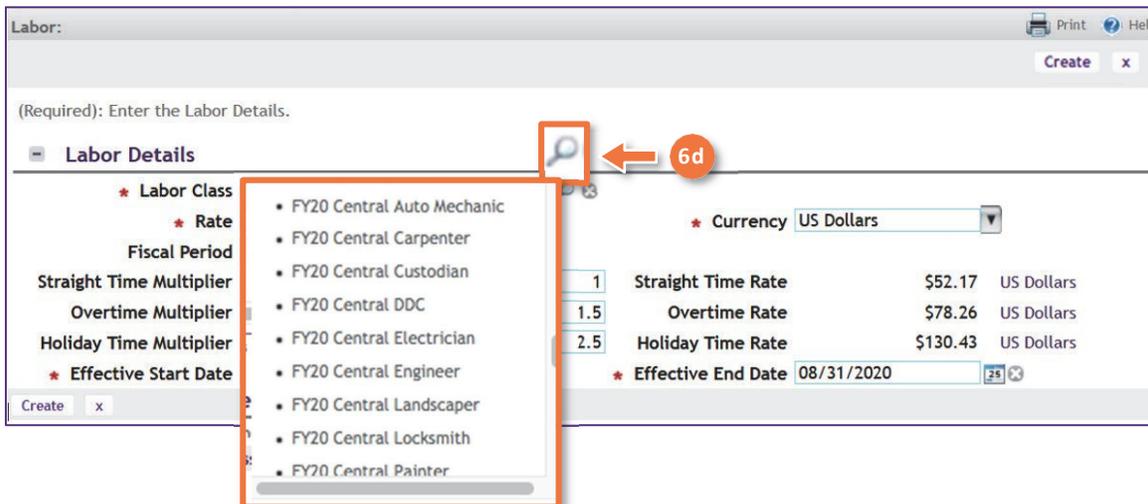**6a** Click on the **Credentials** tab.

6b Locate the **Labor Details** Section.

6c Click on **Add** button.

6d Beside the **Labor Class** field, use the **Search** button to locate the appropriate **Fiscal Year / Workgroup** option (e.g. FY20 Central Carpenter); click on the desired option to apply.

HUMAN RESOURCES:
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

6 Confirm the **Labor Rate and Fiscal Year** (continued):

6e Beside the **Rate** field, use the **Search** button to locate the correct **Fiscal Year Period**.

6f Click on the **radio** button beside the Fiscal Year Period to select.

6g Click the **OK** button to confirm and save the updated Fiscal Year Period.

6h Click on the **Create** button to save the Labor Details.

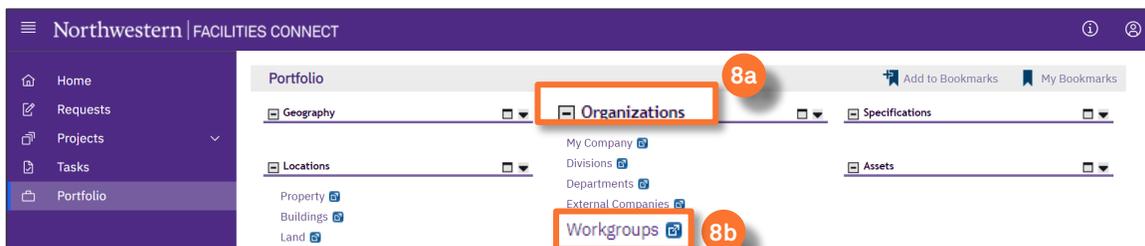# HUMAN RESOURCES:
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DIRECTIONS:

7 Confirm and save the changes to the **Employee Record**:

7a Click on the **Activate** button.

7b Use the X to close the Employee Record window.

8 Next, update the Employee status to "Team Member" in all Workgroups they are assigned:

8a From the Portfolio tab, locate the Organization section.

8b Click on **Workgroups**.

HUMAN RESOURCES:
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DIRECTIONS:

9 Confirm and save the changes to the Employee Record:

9a Use the available **Search Fields** to locate the desired Workgroup.

9b Click anywhere on the Workgroup Record line to open.

10 Upon clicking, the **Workgroup Record** will open in a new window.

10 Click the **Revise** button to edit the record.

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DIRECTIONS:

11 Once the Workgroup Record is in **Edit Mode**,

11 Select the **Team Member & Contacts** tab.

12 Next, add the Employee to the **Team Member List**:

12a Click on the **Find** button.

HUMAN RESOURCES:
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DIRECTIONS:

12 To add an Employee to the **Team Member List** (continued):

12b Upon clicking, the **Employee** selection window will pop-up inside the Team Member List.
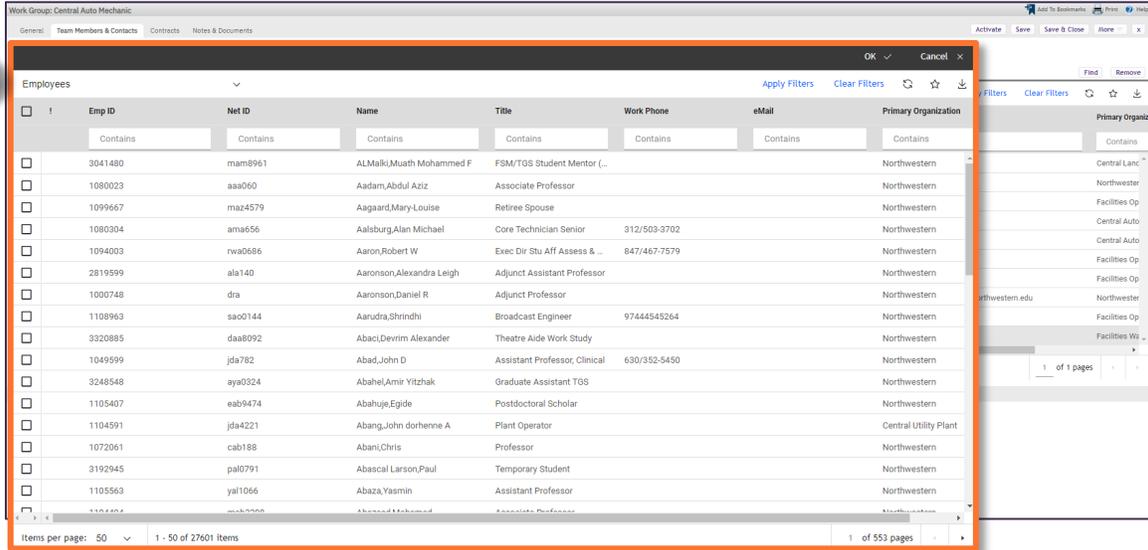
12c Use the available **Search Fields** to locate the desired Employee.

12d Click on the **Checkbox** beside the Employee to select.

12e Click on the **OK** button to confirm and save the selection.
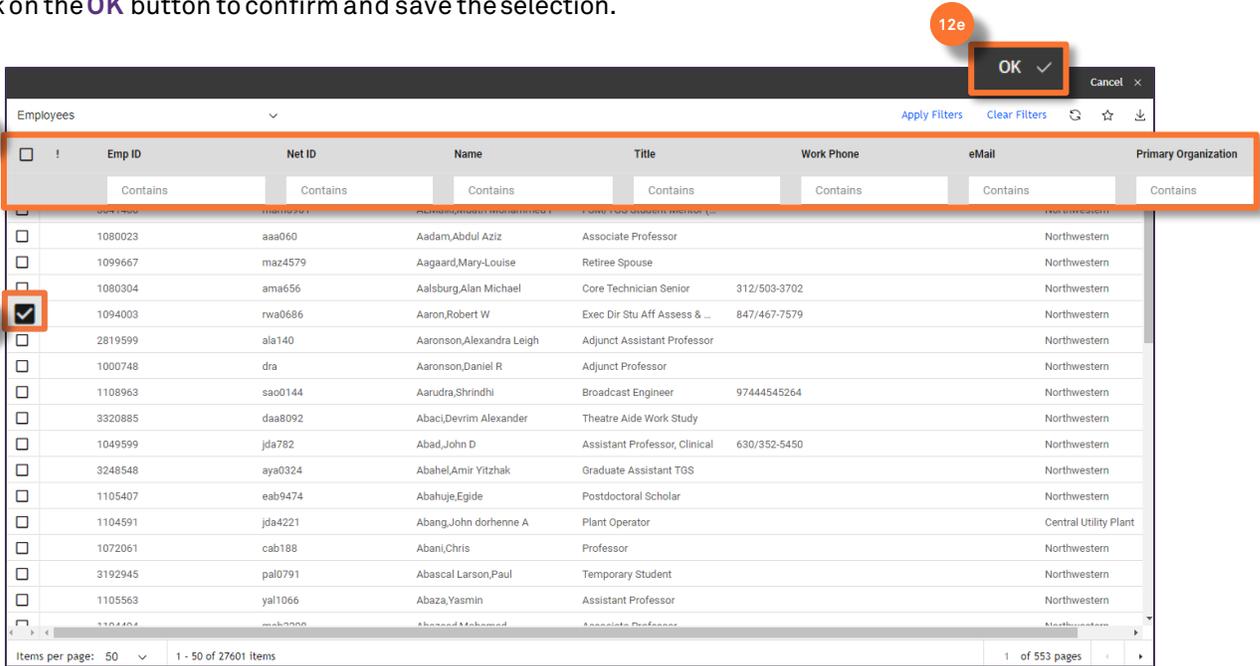
▼ INFORMATION

Repeat Step #12 as necessary to add any additional Employees to the Team Member List.

HUMAN RESOURCES:
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DIRECTIONS:

13 To save all changes made to the **Team Member List**:

13a Click on the **Activate** button.

Work Group: Facilities Human Resources					13a Add To Bookmarks	Print	Help

General | Team Members & Contacts | Contracts | Notifications | Notes & Documer ▶ ⌄ | **Activate** | Save & Close | More ▾ | x

(Optional): List of People associated with this Work Group.

─ Team Members   Find | Remove

⚙ Export   5 total found   Apply Filters   Clear Filters   Show: 50 ⌄

|	!	Emp ID	Net ID	Name	Title	Work Phone	eMail	Primary Organization
	C	Contains	Contains	Contains	Contains	Contains	Contains	Contains
☐		1104051	elg5396	Goldstein,Evan L	Reliability Engineer	847/467-7460	evan.goldstein@northwestern.edu	Facilities Operations
☐		1060420	rng400	Gunn,Rachel N	Assistant Director, FMHR	847/467-6559	r-gunn@northwestern.edu	Facilities Human Resources
☐		2263297	keh438	Harris,Kevin Eugene	Senior Director Facilities Management - Operations	847/467-6654	kevin.harris@northwestern.edu	Facilities Operations
☐		1068975	jjm153	McKinney Jr,James I	Dir Facilities Mgmt Ops	847/467-4809	james-mckinney@northwestern.edu	Facilities Operations
☐		jmk6742	jmk6742	Menarek,John			John.Menarek@northwestern.edu	Central Carpenter