



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.

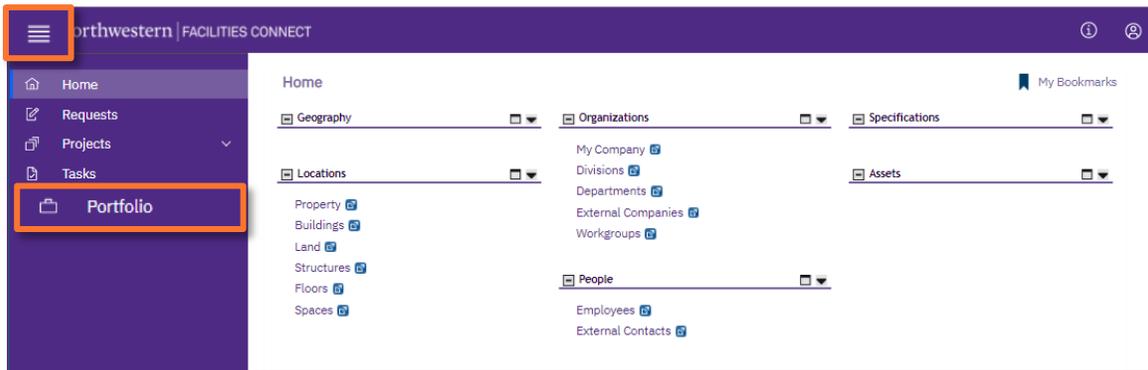
▼ GETTING STARTED

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:

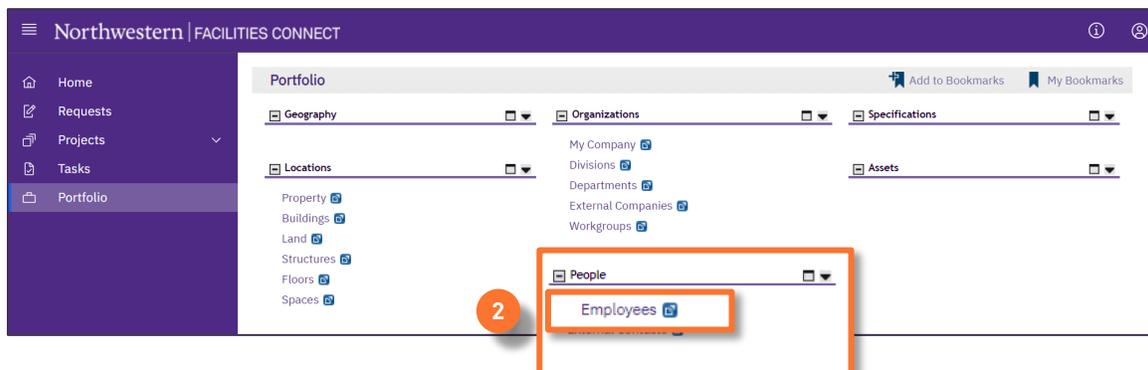
1 From the Facilities Connect homepage, locate the hamburger menu:

1 Click on the **Portfolio** section.



2 Locate the **People** section:

2 Click on the **Employees** option.



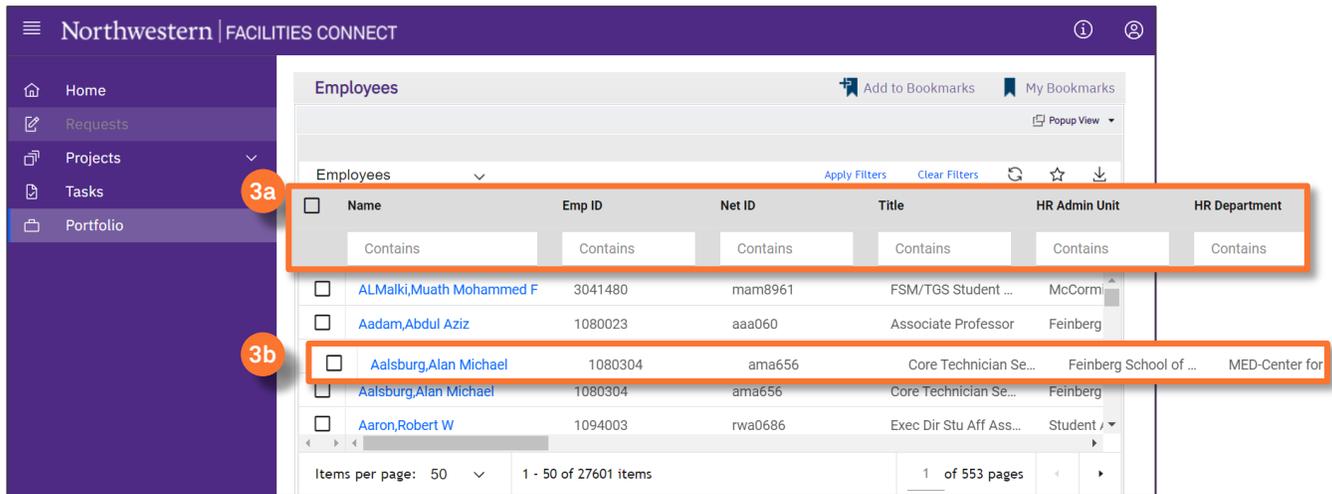


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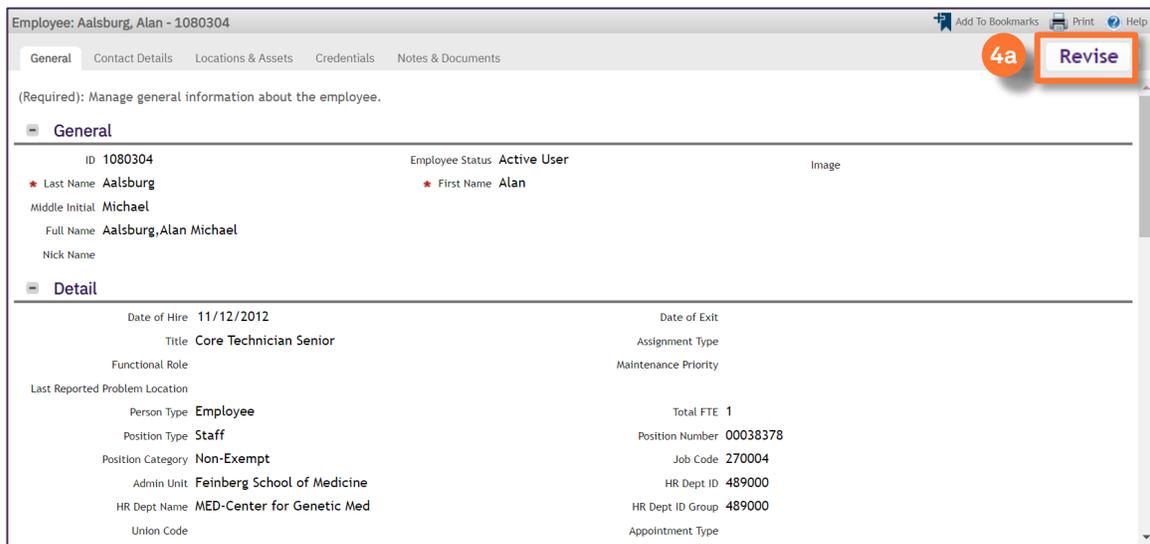
3 Upon clicking, the **Employees** screen will open:

- 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.



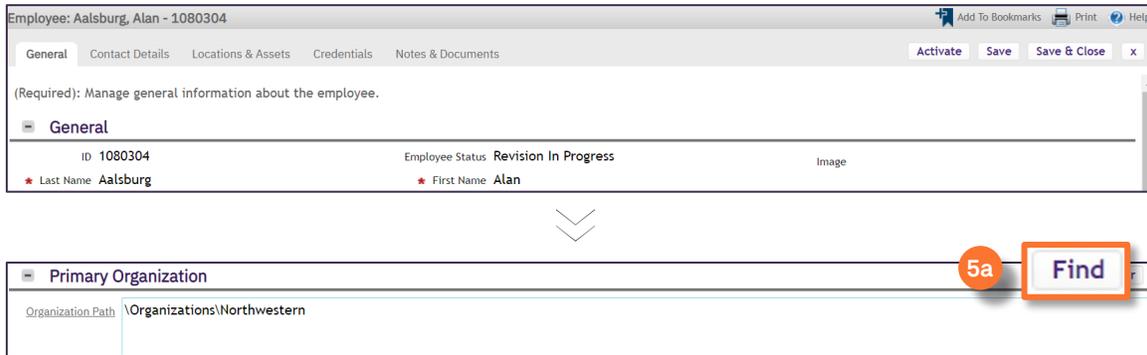


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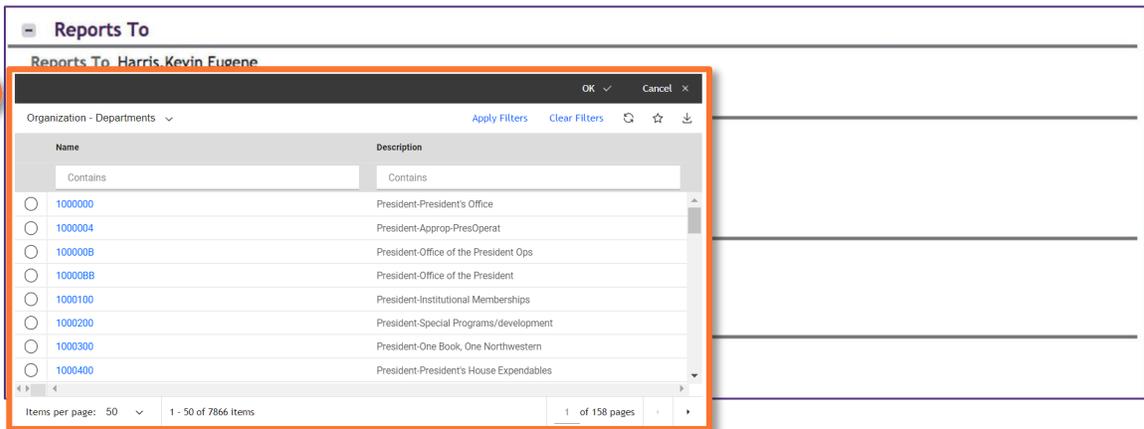
DIRECTIONS:

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.

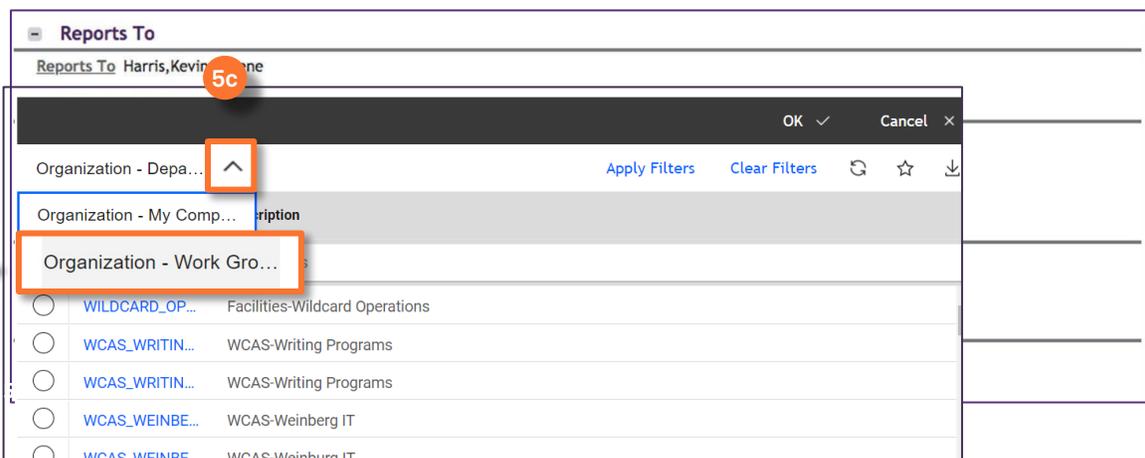


5b Upon clicking, the **Organization** selection window will pop-up inside the Employee Record.



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

5d Select the **Work Groups** option from the drop-down menu.



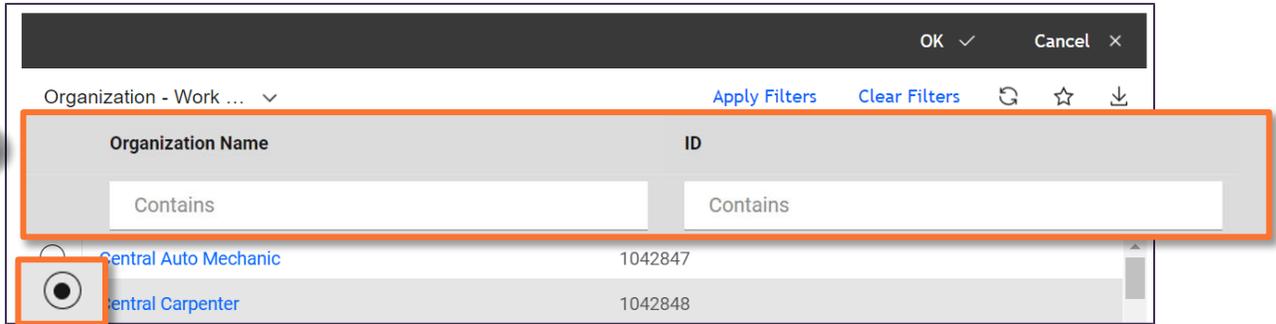


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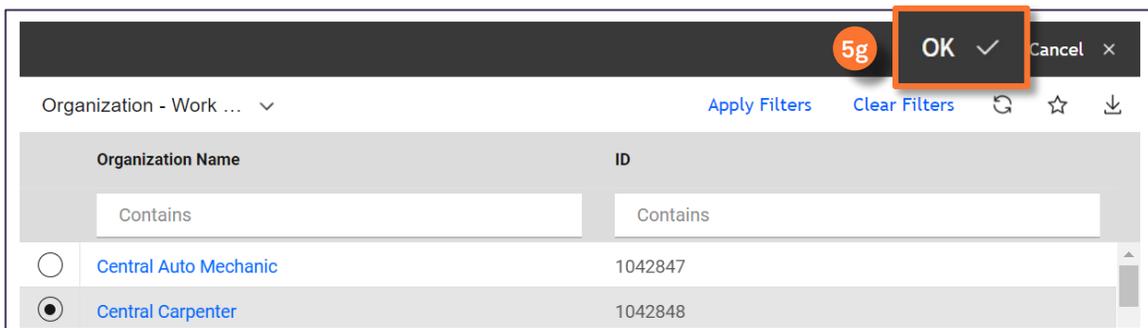
DIRECTIONS:

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.



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



▼ INFORMATION

Repeat Steps #5e-5g to add the Employee to any additional Workgroup(s) as needed.

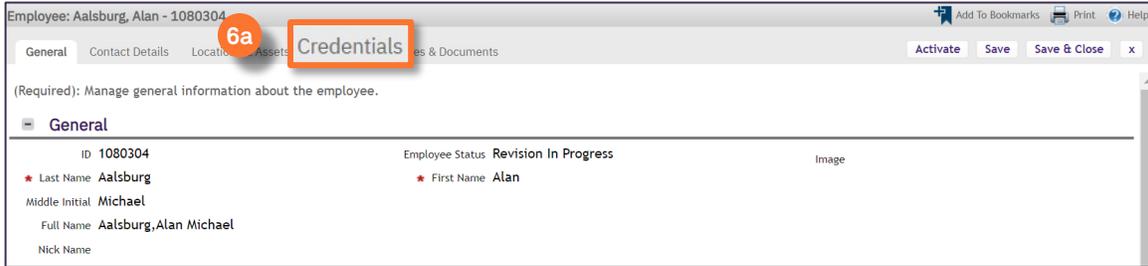


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DIRECTIONS:

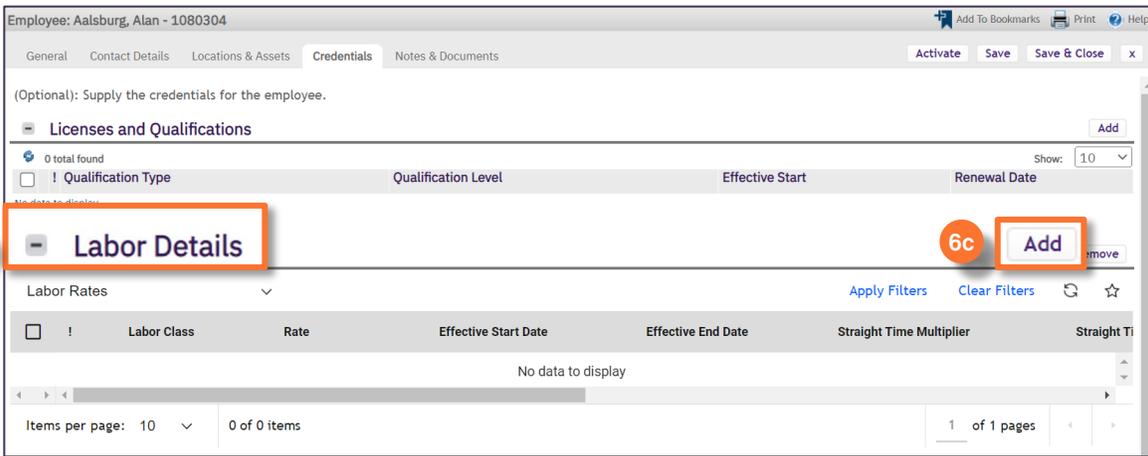
6 Next, confirm the **Labor Rate and Fiscal Year:**

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

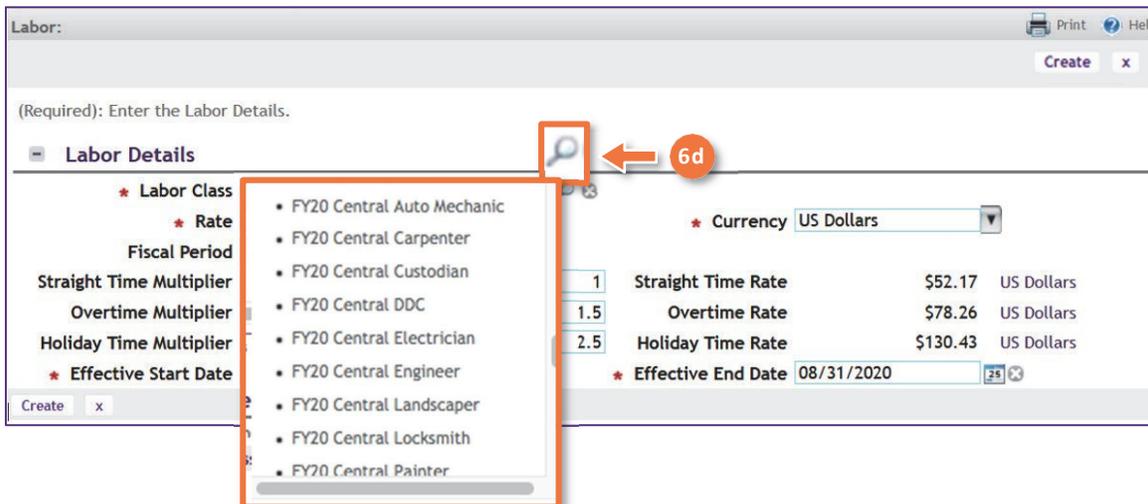


6b Locate the **Labor Details** Section.

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. FY20Central Carpenter); click on the desired option to apply.





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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.

The screenshot shows the 'Labor Details' form. At the top, there are fields for Labor Class, Rate, Fiscal Period, and Currency. A search icon is next to the Rate field, labeled '6e'. Below these is a 'Fiscal Years' table with columns for Name, Start Date, and End Date. The table lists years 2021 through 2024. The radio button for 2021 is selected, labeled '6f'. An 'OK' button is visible in the top right corner, labeled '6g'.

| Name | Start Date | End Date |
|------|------------|------------|
| 2021 | 09/01/2020 | 08/31/2021 |
| 2022 | 09/01/2021 | 08/31/2022 |
| 2023 | 09/01/2022 | 08/31/2023 |
| 2024 | 09/01/2023 | 08/31/2024 |

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

The screenshot shows the 'Labor' form with the 'Labor Details' section expanded. Fields include Labor Class (FY20 Central Landscaper), Rate (\$52.17), Currency (US Dollars), Fiscal Period (2020), and various multipliers. A 'Create' button is highlighted in the top right corner, labeled '6h'.

| | | | |
|---------------------------------|-------------------------|---------------------------|---------------------|
| Labor Class | FY20 Central Landscaper | Currency | US Dollars |
| Rate | \$52.17 US Dollars | Fiscal Period | 2020 |
| Straight Time Multiplier | 1 | Straight Time Rate | \$52.17 US Dollars |
| Overtime Multiplier | 1.5 | Overtime Rate | \$78.26 US Dollars |
| Holiday Time Multiplier | 2.5 | Holiday Time Rate | \$130.43 US Dollars |
| Effective Start Date | 09/01/2019 | Effective End Date | 08/31/2020 |



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DIRECTIONS:

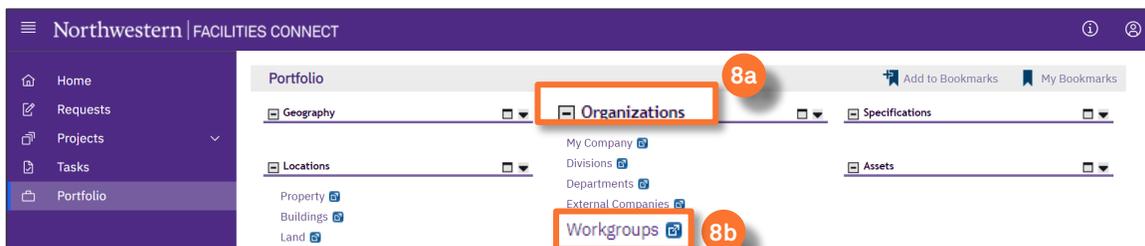
7 Confirm and save the changes to the **Employee Record**:

- 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**.





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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.

| | Name | ID | Chart String | Account Code | Work Group Class | Status |
|--------------------------|-------------------------------|---------|--------------|--------------|------------------|--------|
| <input type="checkbox"/> | Central Auto Mechanic | 1042847 | 160-1804200 | 76001 | Shop | Active |
| <input type="checkbox"/> | Central Carpenter | 1042848 | 160-1804400 | 76026 | Shop | Active |
| <input type="checkbox"/> | Central Contractor Custodi... | 1042885 | 160-1804500 | 76010 | Vendor | Active |
| <input type="checkbox"/> | Central Contractor Elevator | 1042886 | 160-1804800 | 76021 | Vendor | Active |
| <input type="checkbox"/> | Central Contractor Extermi... | 1042887 | 160-1804900 | 76022 | Vendor | Active |

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

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

Work Group: Facilities Human Resources

General Team Members & Contacts Contracts Notifications Notes & Documents Calendar Details Includes **10** Revise More x

(Required): General information for Work Group.

General

ID 1042902 Status Active

* Name Facilities Human Resources

Hierarchy Path \Organizations\Workgroups\Facilities Human Resources

Details

Short Name FHR Color [Green Box]

Organization Type Workgroup

Maintenance Center

Work Group Class Team

HR ID

Accounting Cost Center Supervisor Gunn, Rachel N Primary Mail Stop



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DIRECTIONS:

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

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

Work Group: Facilities Human Resources

General | **Team Members & Contacts** | Notifications | Notes & Documents

(Required): General information for Work Group.

General

ID: 1042902 | Status: Revision In Progress

* Name: Facilities Human Resources

Hierarchy Path: \Organizations\Workgroups\Facilities Human Resources

Details

Short Name: FHR | Color: [Green Box]

Organization Type: Workgroup

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

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

Work Group: Facilities Human Resources

General | **Team Members & Contacts** | Contracts | Notifications | Notes & Documents

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

Team Members [12a] Find Remove

Export 5 total found Apply Filters Clear Filters Show: 50

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

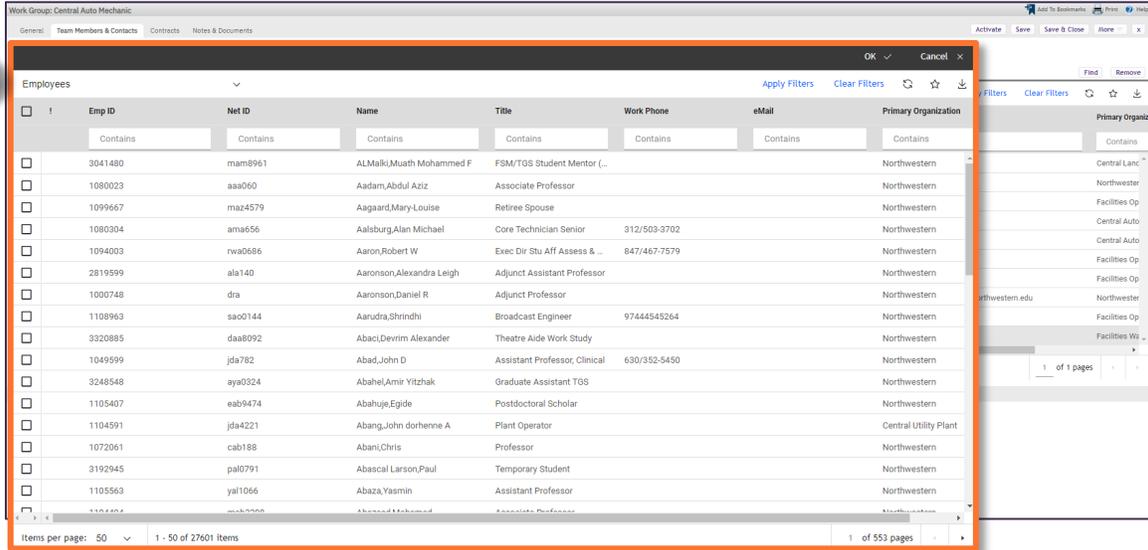


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DIRECTIONS:

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

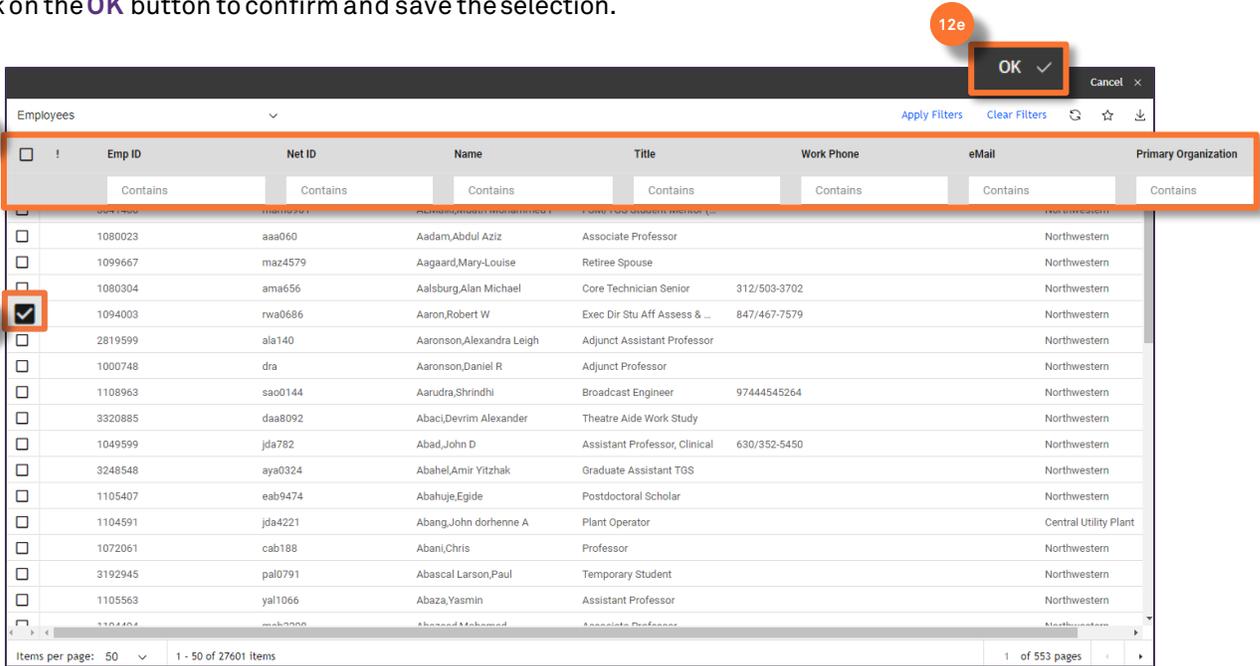
12b Upon clicking, the **Employee** selection window will pop-up inside the Team Member List.



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.



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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 & Documents 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

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