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:
   - Click on the Portfolio section.

2. Locate the People section:
   - Click on the Employees option.
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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.
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DIRECTIONS:

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.

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

5b 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.

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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.

   ![Credentials Tab](image)

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

6c. Click on **Add** button.

   ![Labor Details Add Button](image)

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.

   ![Search Button](image)
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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.

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

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**, select the **Team Member & Contacts** tab.

12 Next, add the Employee to the **Team Member List**: click on the **Find** button.
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DIRECTIONS:

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.

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

To save all changes made to the Team Member List:

1. Click on the Activate button.