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, he/she/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,
   - Click on the Portfolio tab.

2. Locate the People section:
   - 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.

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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:

First, update the employee’s **Primary Organization**:

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

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

3. Next, use the **Related Reports** drop down arrow to search for the desired Workgroup.

4. Select the **Work Groups** option from the drop-down menu.
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.
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:

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.
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.

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**.
ADD A NEW WORKGROUP MEMBER

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.

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

10  Click the Revise button to edit the record.
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

**11** Once the Workgroup Record is in Edit Mode,
   
11a Select the Team Member & Contacts tab.

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

12a Click on the Find button.
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.
To add an Employee to the Team Member List (continued):

Click on the Activate button to save the new Team Member List.

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