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.

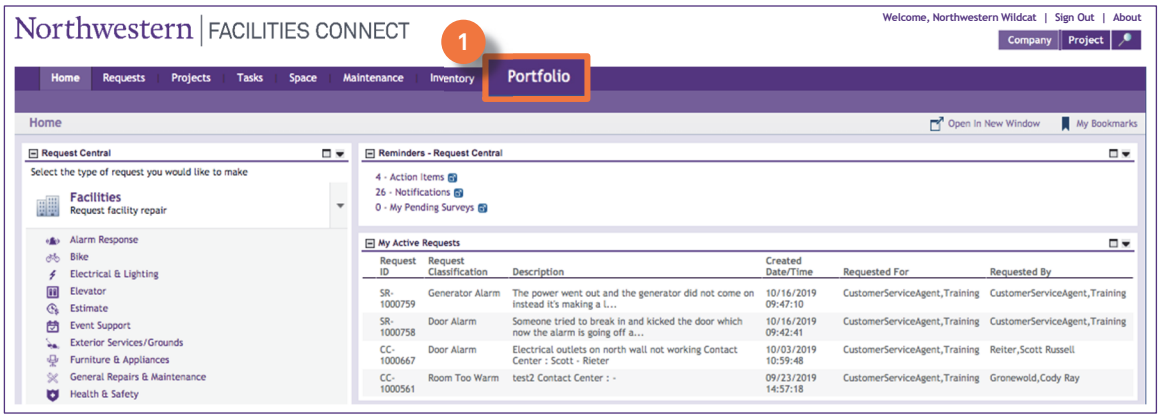
▼ GETTING STARTED

Once a new employee has been added to Facilities Connect, 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:

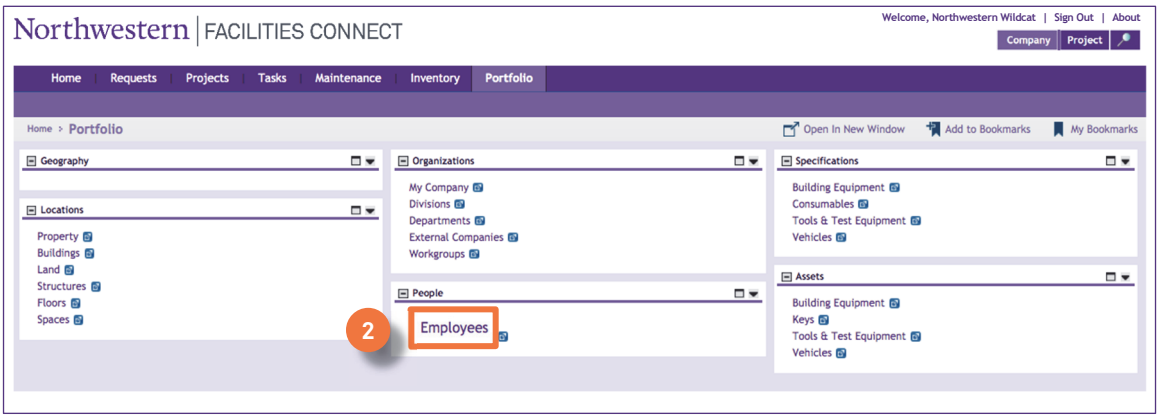
1 From the Facilities Connect homepage,

1. Click on the **Portfolio** tab.



2 Locate the **People** section:

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



HUMAN RESOURCES

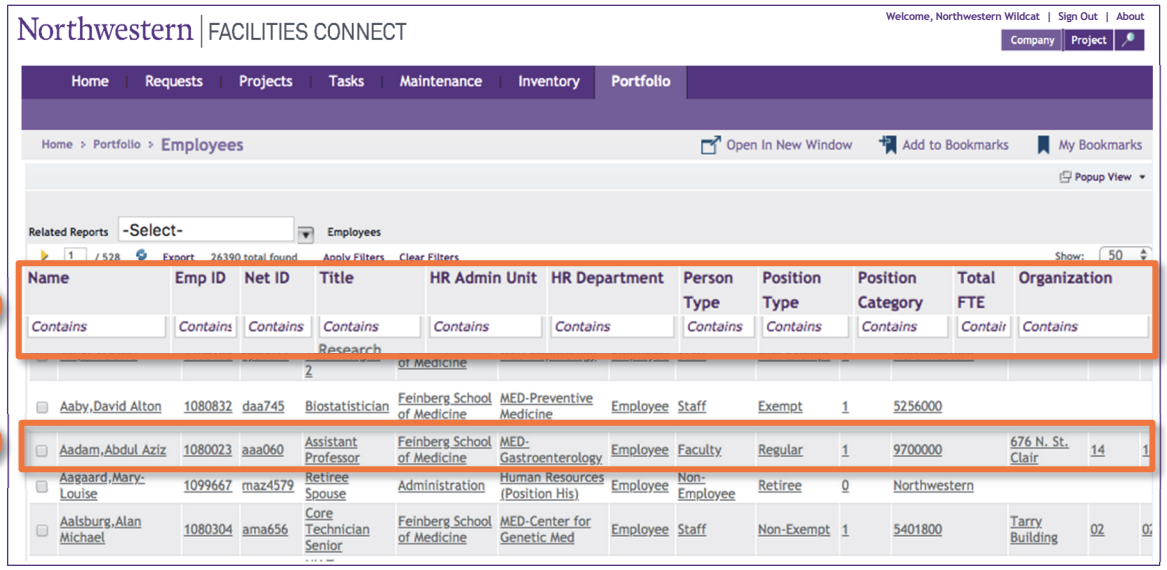
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

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

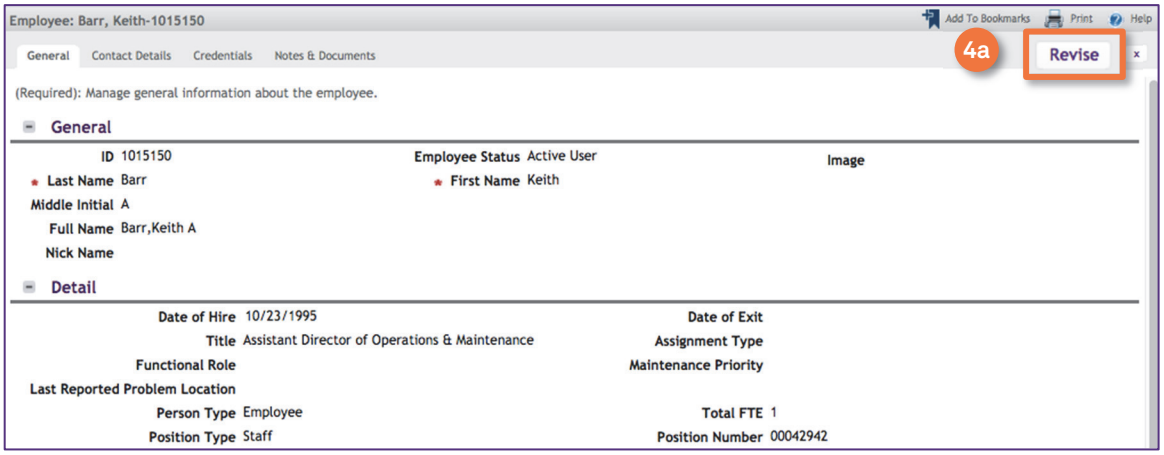
3a Use the available **Search Fields** to locate a specific employee.

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.



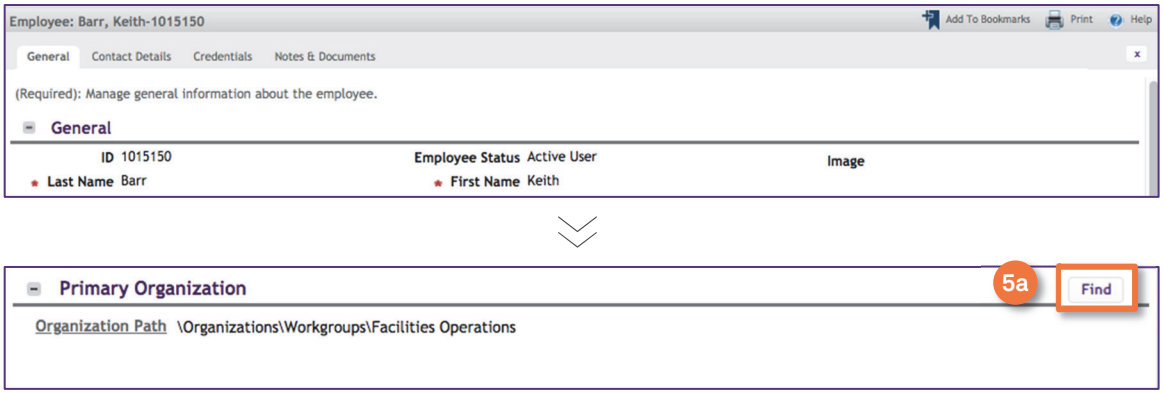
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

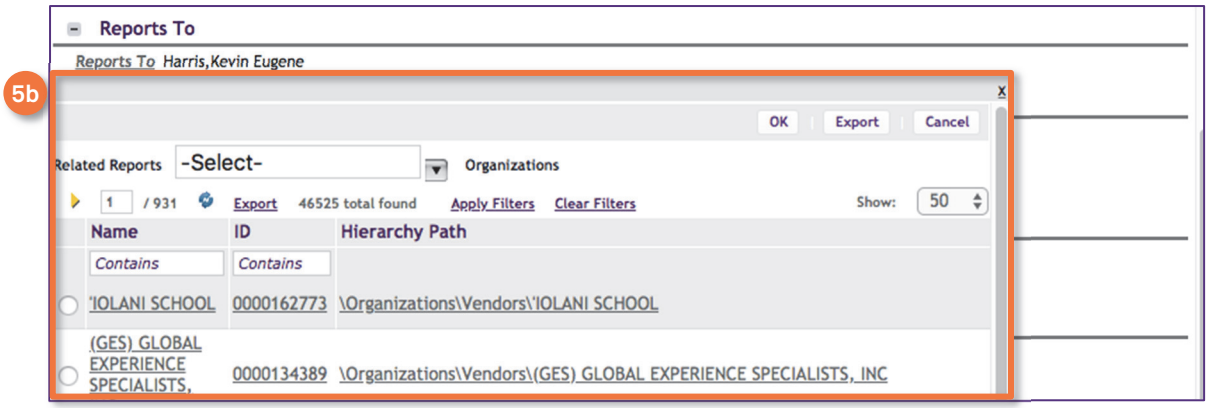
DIRECTIONS:

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.

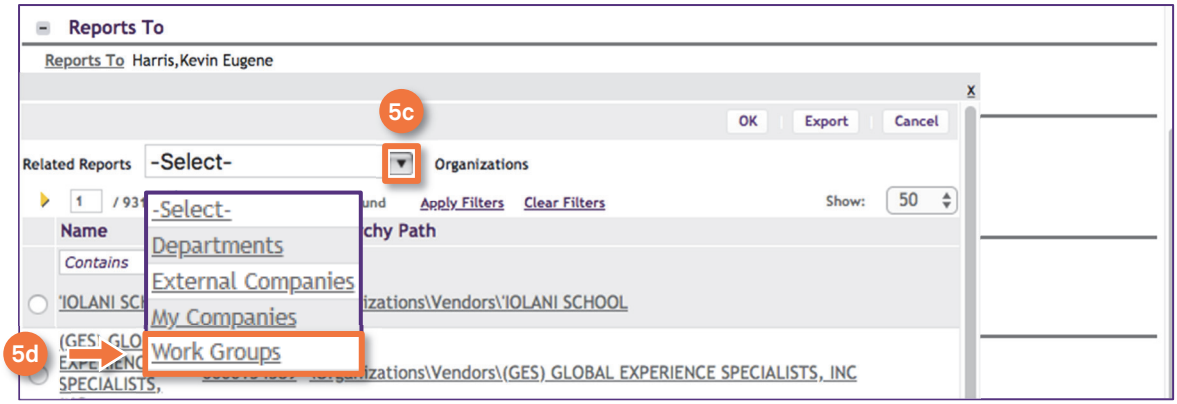


5b Upon clicking, the **Organization** selection window will pop-up inside the Employee Record.



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

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



HUMAN RESOURCES

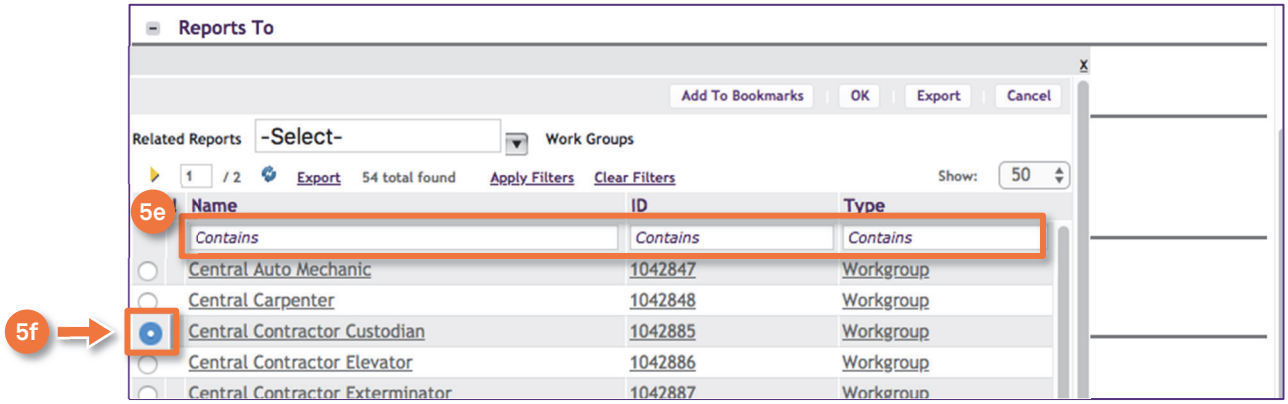
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

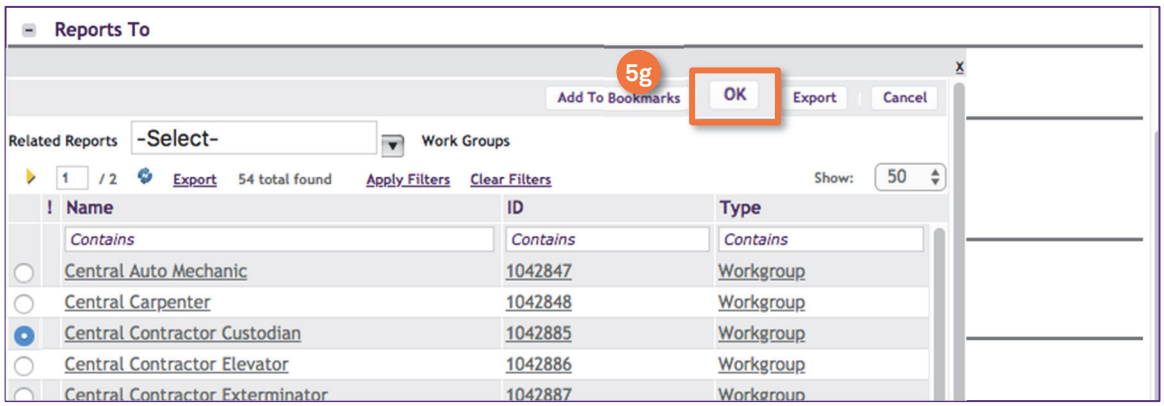
5 Update the **Primary Organization** (continued):

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

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



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.

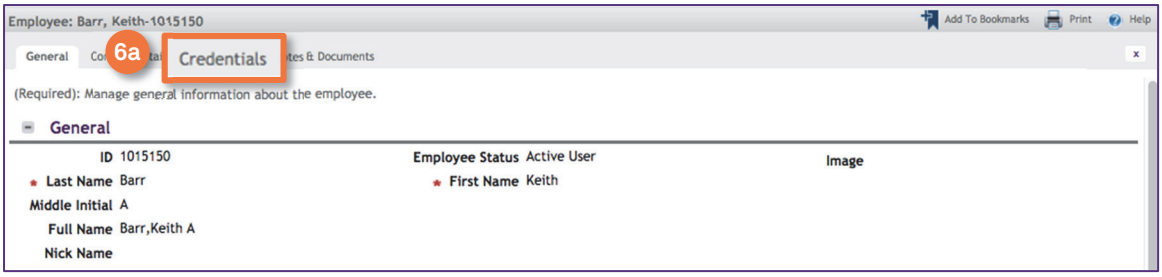
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

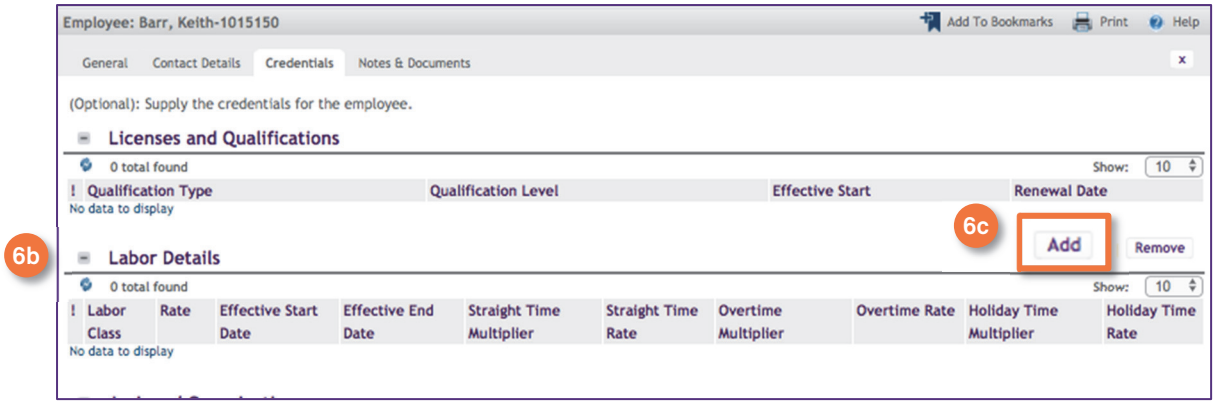
6 Next, confirm the **Labor Rate and Fiscal Year**:

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

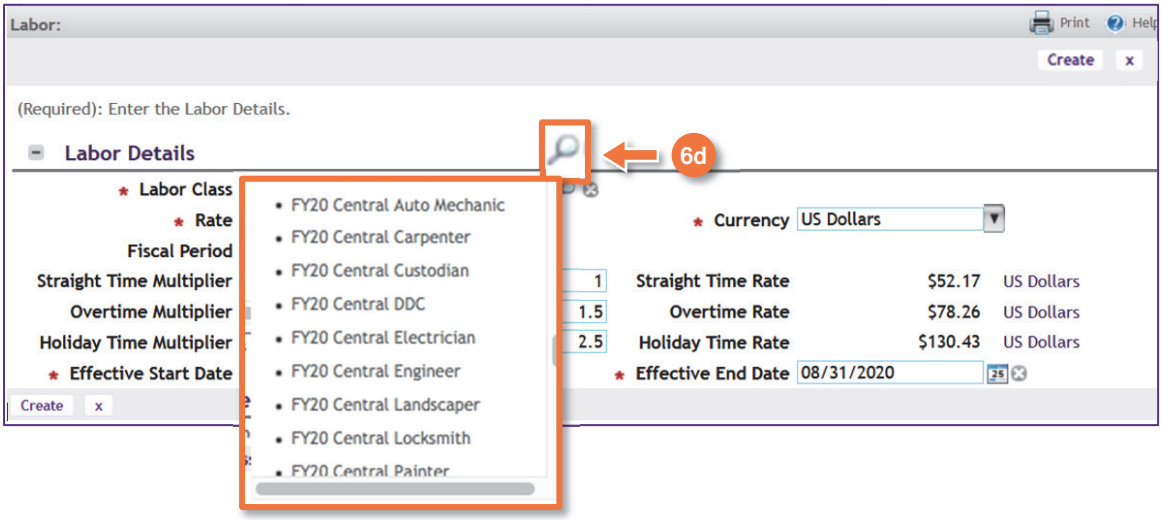


6b Locate the **Labor Details** Section.

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.



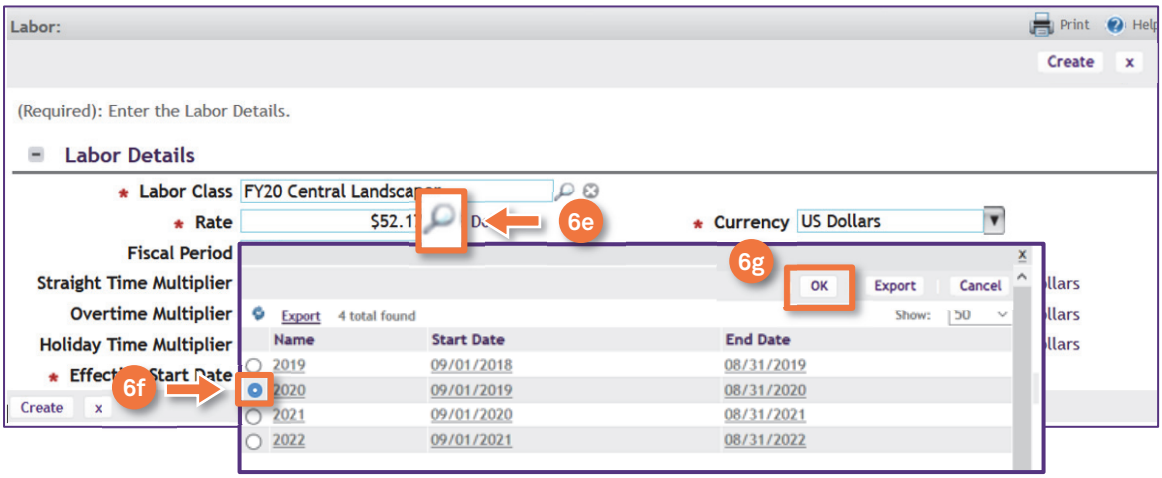
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

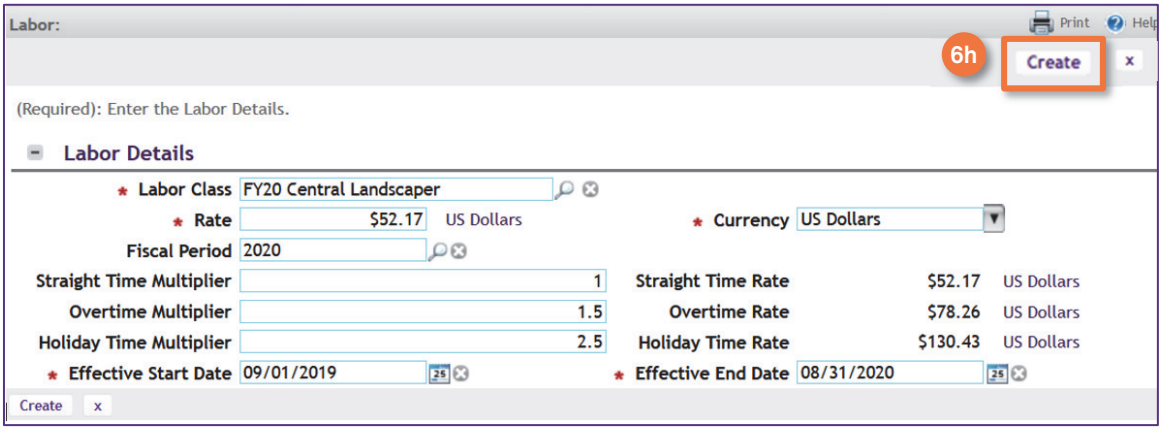
DIRECTIONS:

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.



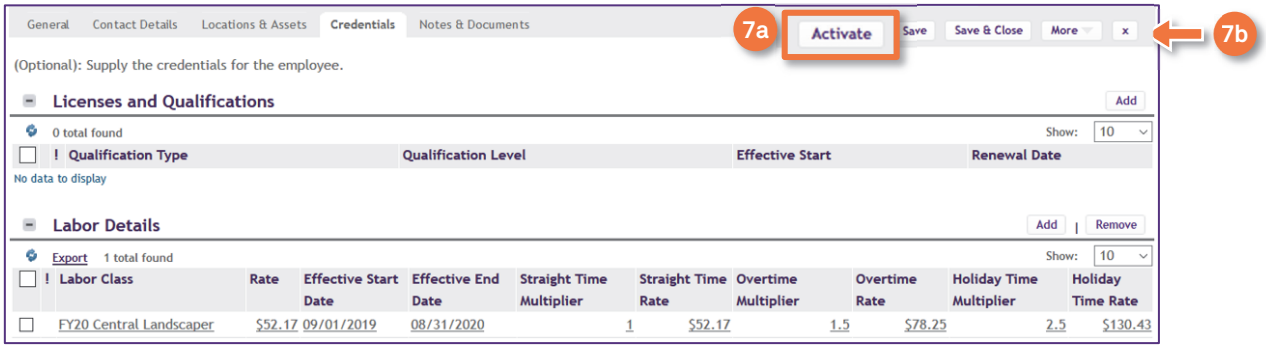
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

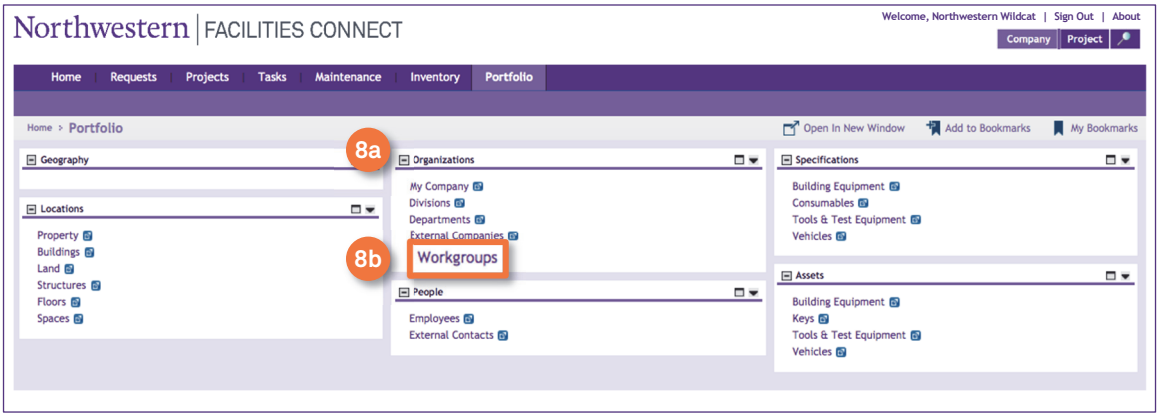
7 Confirm and save the changes to the **Employee Record**:

- **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

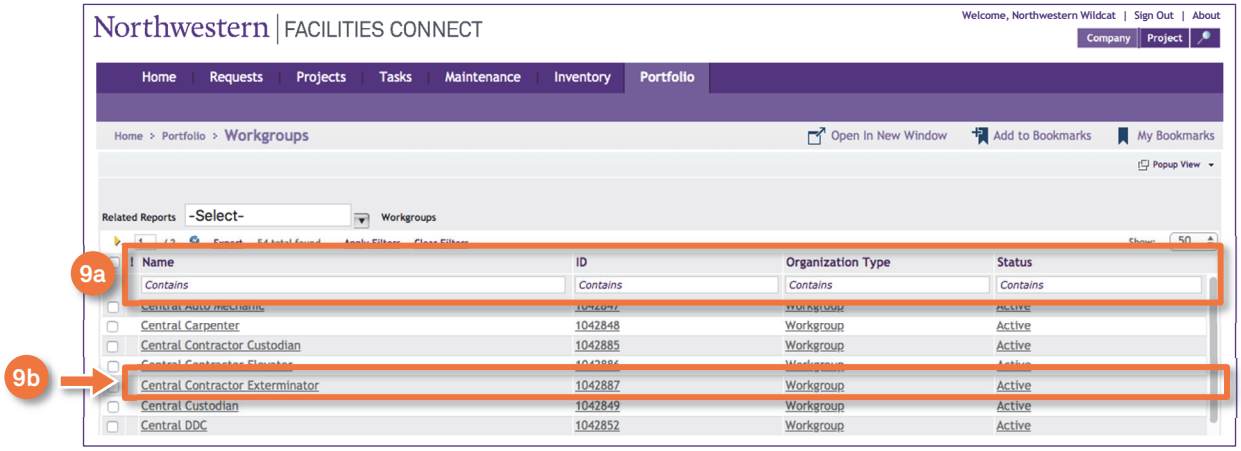
ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

9 Confirm and save the changes to the Employee Record:

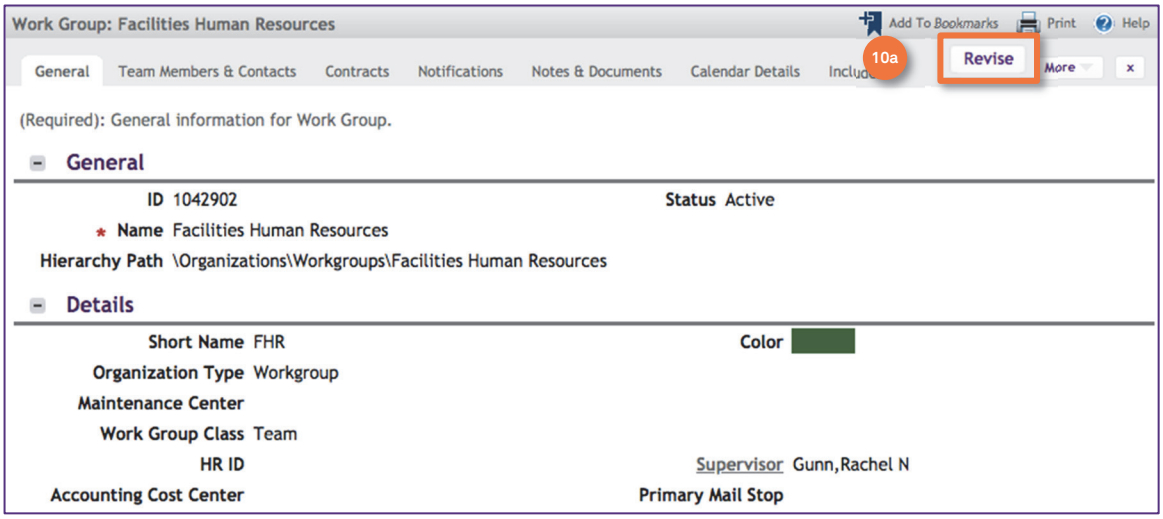
9a Use the available **Search Fields** to locate the desired Workgroup.

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



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

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



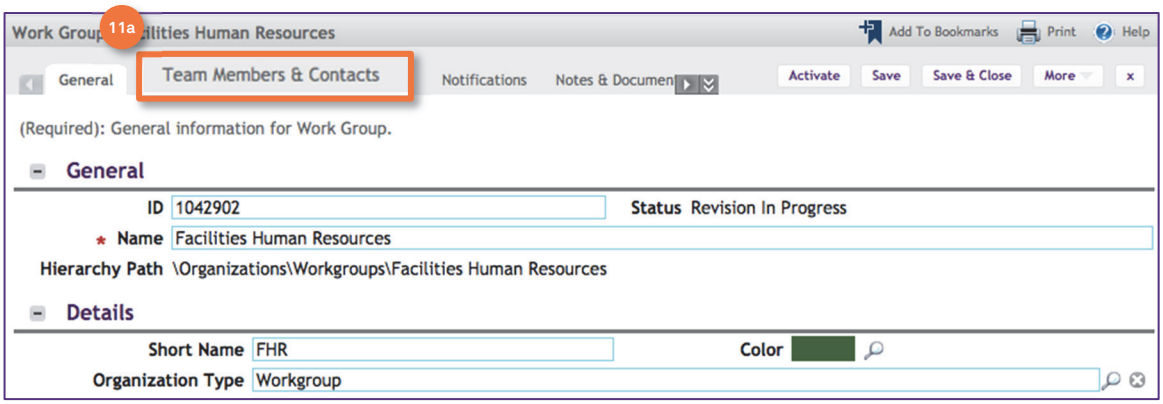
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

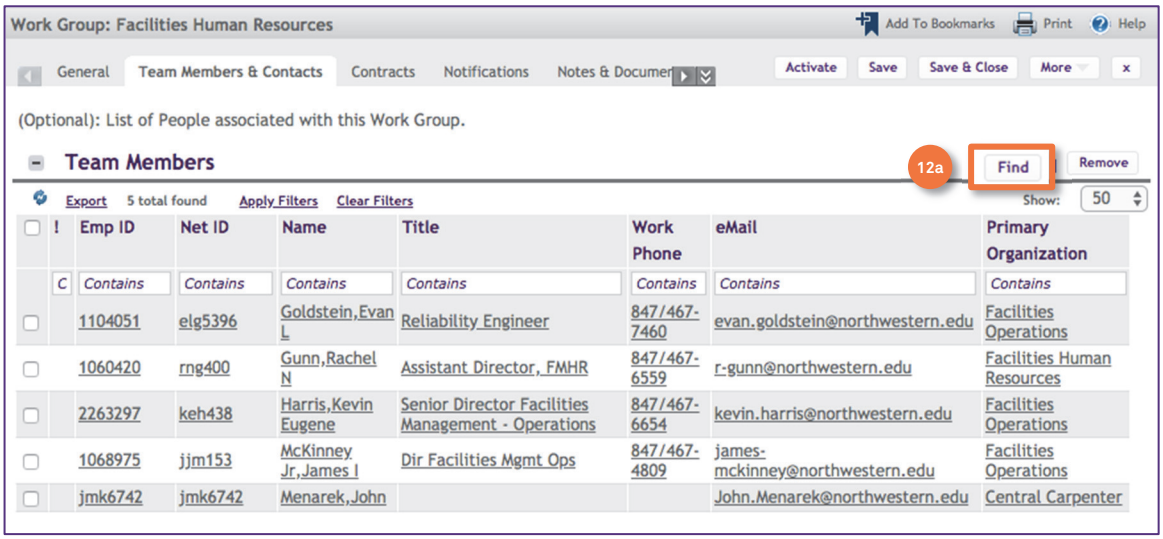
11 Once the Workgroup Record is in **Edit Mode**,

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



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

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



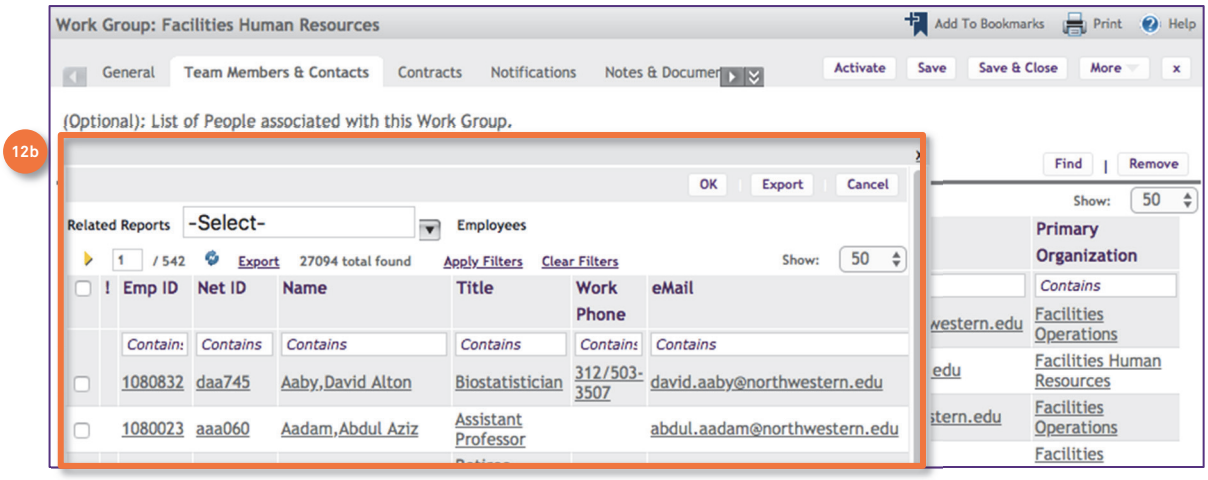
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

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

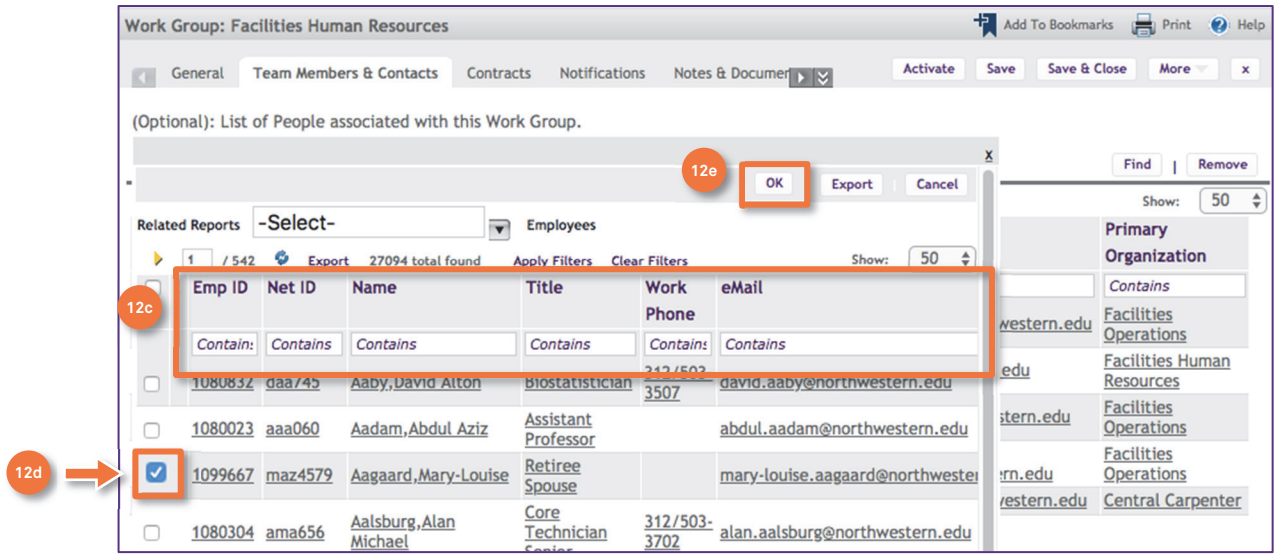
12b Upon clicking, the **Employee** selection window will pop-up inside the Team Member List.



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.



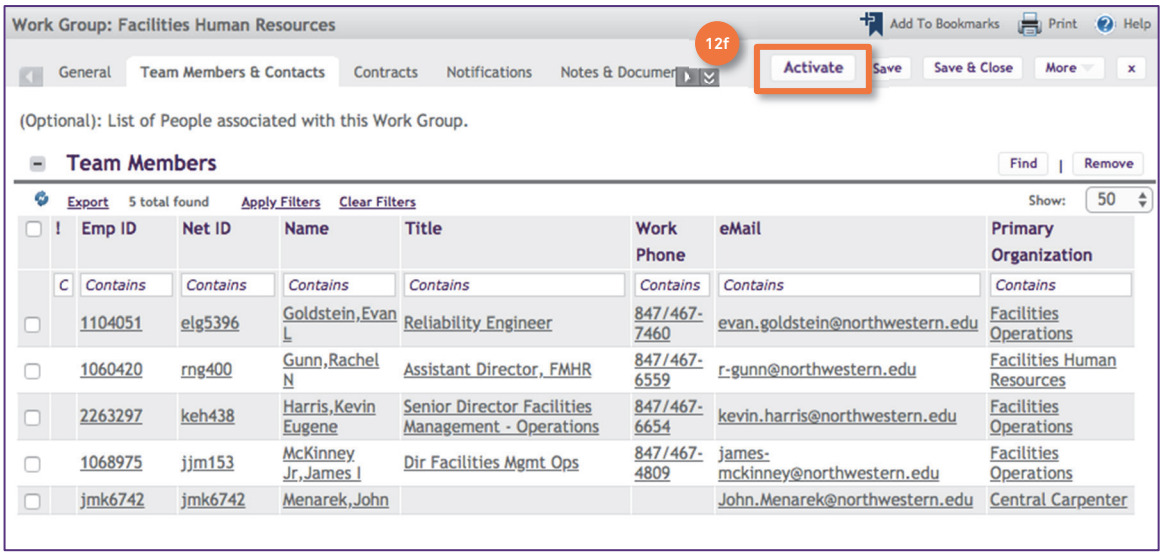
HUMAN RESOURCES

ADD A NEW WORKGROUP MEMBER

DIRECTIONS:

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

12f Click on the Activate button to save the new Team Member List.



▼ INFORMATION

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