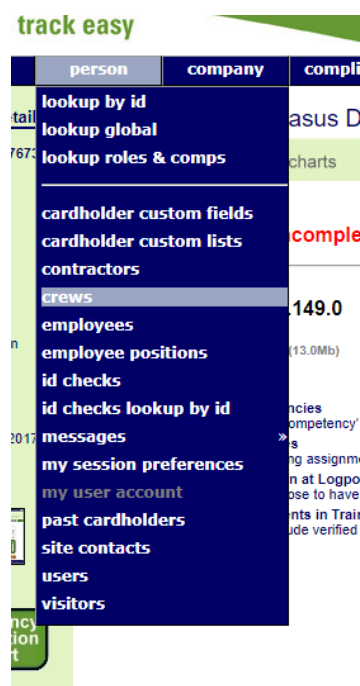N.B – Before beginning this process ensure the user has the correct permissions → Can Manage Crews

STEP ONE | Create the crew

Under the Person tab, click crews

Click add

Name the crew, the location the crew will work at and the minimum number of members for the crew. Click Save.

STEP TWO | Adding Members

Chose if you are wanting to search in All Cardholders, Employees, Contractors or Existing Crew. Leave the search box blank and this will return the full list of the category you have chosen.

Tick the people you want to add to the crew (the add button will appear once you tick a person). If that person is a part of a second crew you will also need to tick the 'Retain' box so they remain in the first crew. Click Add to add them to the crew.

STEP THREE | Adding Members from their Profile

On the person Profile scroll down to the 'Crews' section, select the crew you want to add them to and click Add

Once you add the additional crew you will have the option to decide which crew will be the default crew.

STEP FOUR | Deleting Members

If a crew changes and you need to remove crew members.

Select the crew you are wanting to amend. Click 'delete' next to the person's name you are removing from the crew.

STEP FIVE | Inactivating a crew

You are unable to delete a crew, you instead will make them inactive. When making a crew inactive it is not necessary to remove the crew members.

Select the crew you want to make inactive, click edit

Crew Project Crew

Name:	Project Crew
Location:	Pegasus Demonstration
Min. Members:	2
Active:	✓

edit

Untick the active box and click Save

Edit Crew Project Crew

Name:	Project Crew
Location:	Pegasus Demonstration ▼
Min. Members:	2
Active:	☐

cancel   save

► A crew is **complete** if it has equal to or greater than the minimum number of members.

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