

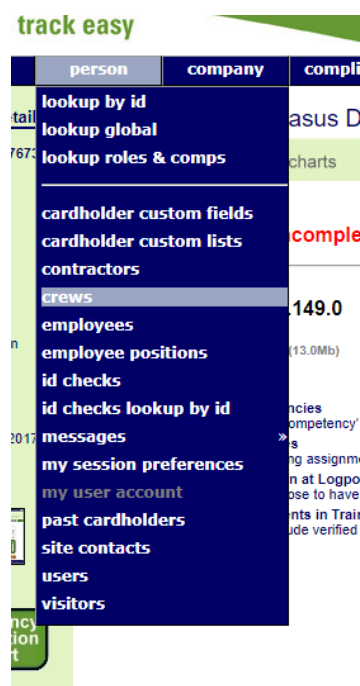
User Guide

Managing Crews

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

Crews

Search: Include Inactive

Found 0 matches.

- ▶ Leave search box blank to match all crew names, or enter a text fragment to find matching names.
- ▶ Click add to add a new crew.

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

Add Crew

Name:

Location:

Min. Members:

Active:

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

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.

Crew Marketing Crew

Name: Marketing Crew
 Location: Pegasus Demonstration
 Min. Members: 0
 Active:

MEMBERS

0 members **INCOMPLETE**

Name	Leader	ID	Delete
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- ▶ A cardholder can be a member of multiple crews
- ▶ A complete crew has at least the minimum number of members.
- ▶ Click link in Leader column to toggle a member's leader status. To be a crew leader the member must have an email address.
- ▶ Add new members by doing a cardholder, custom list or crew search, select cardholders and use the add button.

Cardholders

Crew

Select	Name	ID	Person Type	Retain	Crews
<input type="checkbox"/>	Anthony, Chris	1437941	Contractor	<input type="checkbox"/>	
<input type="checkbox"/>	Crawford, Jarrod	1437940	Contractor	<input type="checkbox"/>	
<input type="checkbox"/>	Dundas, Amy	1437968	Employee	<input type="checkbox"/>	Project Crew
<input type="checkbox"/>	Elliott, Adam	1437943	Contractor	<input type="checkbox"/>	
<input type="checkbox"/>	Patel, Sarah	1437972	Employee	<input type="checkbox"/>	
<input type="checkbox"/>	Spurling, Hiren	1437971	Employee	<input type="checkbox"/>	Project Crew
<input type="checkbox"/>	Stevenson, Felicity	465383	Contractor	<input type="checkbox"/>	

Select All

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.

MEMBERS

0 members **INCOMPLETE**

Name	Leader	ID	Delete
------	--------	----	--------

add

- ▶ A cardholder can be a member of multiple crews
- ▶ A complete crew has at least the minimum number of members.
- ▶ Click link in Leader column to toggle a member's leader status. To be a crew leader the member must have an email address.
- ▶ Add new members by doing a cardholder, custom list or crew search, select cardholders and use the add button.

Cardholders ▼ **search**

Crew

Select	Name	ID	Person Type	Retain	Crews
<input type="checkbox"/>	Anthony, Chris	1437941	Contractor	<input type="checkbox"/>	
<input type="checkbox"/>	Crawford, Jarrod	1437940	Contractor	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Dundas, Amy	1437968	Employee	<input checked="" type="checkbox"/>	Project Crew
<input type="checkbox"/>	Elliott, Adam	1437943	Contractor	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Patel, Sarah	1437972	Employee	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Spurling, Hiren	1437971	Employee	<input checked="" type="checkbox"/>	Project Crew
<input checked="" type="checkbox"/>	Stevenson, Felicity	465383	Contractor	<input type="checkbox"/>	

Select All

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

edit

photo & card

CREWS

Marketing Crew ▼

add

Name	Default	Delete
Marketing Crew		
Project Crew	Yes	Delete

PERSONAL CONTACTS*

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

CREWS

Marketing Crew ▼ **add**

Name	Default	Delete
Marketing Crew	No	Delete
Project Crew	Yes	Delete

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.

MEMBERS

Show Logpoint Access

3 members **COMPLETE**

Name	Leader	ID	Delete
Dundas, Amy		1437968	Delete
Patel, Sarah		1437972	Delete
Spurling, Hiren	no	1437971	Delete

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:



Untick the active box and click Save

Edit Crew Project Crew

Name:
Location: ▼
Min. Members:
Active:



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