

Client Portal

Add New Worker

Overview





Feature Description

- Clients are progressively adding workers to their workforce; the process is currently completed in our V2 product. Moving between products can be tiresome and confusing for some users. This feature aims to eliminate the need to return to the V2 product when creating new workers.

Feature Purpose

- The **purpose** of this feature is to allow client users to efficiently create a new worker profile within their workforce.




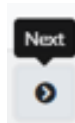
User Story/s

- As a Client Portal User, I can create a new worker profile so that I can connect them to my workforce.
- Given I am adding a new worker, as a Client Portal User, I can select a worker with an existing Pegasus Profile to add them to my workforce so that I don't create duplicate worker records.



1. Worker Search


- Click the **Add Button**  to initiate the Add Worker Process;
- **Search** for the Worker by completing the **mandatory** fields;
 - First Name;
 - Last Name;
 - Date of Birth.




- Click the **Next Arrow**



Worker
Add Worker


1 Start ————— 2 Select ————— 3 Finalise

First Name
 
First Name is required

Middle Name

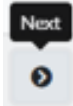
Last Name
 
Last name is required.

Date of Birth
  
Date of birth is required.

Cancel  Done



2. Select Worker or Create New

- Select an **existing Worker** from the search results; **OR**
- Select **Create As New**.
- Click the **Next Arrow** 

Worker
Add Worker

1 Start ————— 2 Select ————— 3 Finalise

i An existing worker may be in our system that matches the information you have entered. If an existing worker is found, the worker will be shown in the results below.
If the search result **matches** the worker, **select the worker**, and **click the next arrow**.
If **no matches** are found, **select create as new**, and **click the next arrow**.

1 Match Found

Damien Challenge 1464715
DARK PEGASUS AND FREEDOM ENTERPRISES PTY. LTD.
ONSITE TRACK EASY PTY LIMITED
PEGASUS MANAGEMENT PTY. LIMITED
Pegasus Management Pty. Limited [Training Data]


CREATE AS NEW ✓

Cancel < **Next** > Done



3. Complete Worker Profile

If the Worker's Profile is an **existing Pegasus Profile** or a **New Worker profile** is being created ensure the following is completed:

- Upload the **Worker's Photo** (mandatory);
- Complete the **mandatory** fields:
 - **Company** (click the *ellipsis* button  to add a company);
 - **Email Address**;
 - **Phone Number**;
 - **Gender** (mandatory based on client requirements);
- Enter any remaining worker profile details (if required).
- Click **DONE**.

Worker
Add Worker

1 Start 2 Select 3 Finalise

Worker Details

Upload Clear
Photo is required

Company
Company is required.

First Name
Joe

Middle Name


Last Name
Bloggs


Date of Birth


Cancel Done




4. Worker Profile

- If the **existing Pegasus Profile** was selected – the worker is associated to the client perspective.
- If the **Create as New** option was selected – a new worker profile is created, and a **unique Worker ID** is assigned.
- Click the **Edit**  button to **update** the Worker Profile.


Worker Profile
Joe Bloggs 





| | |
|---------------------------------|------------------------|
| ID | 3846956 |
| Types | Contractor |
| Date of Birth | 01 Jan 1998 |
| Phone Number | 0425111666 |
| Contact Email | jbloggs@pegasus.net.au |
| Unique Student Identifier (USI) | |


Companies 

Pegasus Safety And Training Pty Ltd (Default) –

Crews  None

Sites  None

Roles  None





Notes

- Gender
 - Gender will be mandatory if the Realm / Site setting of **Gender Compulsory = Yes**

Other

| | |
|--------------------------|--|
| Cal Basis: | Concurrent Login |
| Cals: | 4 |
| Gender Compulsory: | YES |
| Emp Legacy Id Locked: | NO |
| Legacy Id Name: | Legacy ID |
| Legacy Id Auto Prefix: | (none) |
| Auto Con Key: | (none) |
| Auto Emp Key: | (none) |
| Con Assoc Requires Card: | NO |
| Emp Assoc Requires Card: | NO |
| Offline Validation: | NO <input type="button" value="enable"/> |

- **Unique Email Address**

- For clients who enforce a **Unique Email Address**, the worker's email address must be exclusive for the worker's profile to be saved.
- The user will be advised if the worker's email address is not unique.