USER GUIDE

CREW

Centralized Resource & Employee Workforce

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> This guide covers what every CREW user needs day to day. It is written for Viewers and Admins with site or global scope — HR, IT, Security, Facility, Lobby staff, Management, and other authorized stakeholders. Some sections mention capabilities visible only to certain functions or roles; if you don't see a menu item or button described here, it's because your account isn't authorized for it, not a bug.

1. Logging in

1. Go to the CREW login page and enter your email and password.
2. If this browser isn't already trusted, you'll be emailed a 6-digit verification code — enter it within 10 minutes. You get 3 attempts before you need to start the login over.
3. Optionally check "trust this device" to skip the code for the next hour on this browser.
4. Three wrong passwords in a row locks your account for 60 minutes — this protects your account, not a bug to work around; wait it out or ask a Super Admin to unlock it.
5. Forgotten your password? Use **Forgot your password?** on the login page: enter your email and, if it matches an account, you'll get a reset link (valid 60 minutes). For privacy, the page shows the same message either way — it never confirms or denies that an email is registered.

2. What you can see

Your view of the Workforce list is automatically scoped to what you're allowed to see:

- If your role is site-scoped, you only see resources at your assigned site(s).
- If your role is "all sites," you see everyone.
- Regardless of scope, personal email and gender are hidden from you unless your function is HR or Owner, or your role is Super Admin — this is a deliberate access-control rule, not a display gap. Employment type is visible to everyone.

You never need to ask "which site am I in" — the list is already filtered; anything you can open by clicking is something you're authorized to see.

3. The Dashboard

Your landing page after login: a simple, deliberately uncluttered summary — current headcount, upcoming arrivals/departures, and, for those with statistics access, the turnover trend.

4. Workforce list and detail

- **Workforce** (top navigation) lists resources in your scope, with filters for site, business unit, and status.
- Click a resource to see its full detail page: identity fields you're authorized to see, current lifecycle status, and its **Readiness** panel.

5. Readiness

Each resource being onboarded or offboarded has a set of readiness types that apply to that direction:

Direction	Readiness types checked
Onboarding	Security, Facility, IT, Lobby
Offboarding	Security, IT, Lobby — no Facility, since Facility only has onboarding tasks

If you have write access (an Admin-tier role), you'll see a **Confirm** action on each line, from either the resource's own page or the matching **Departments** page; if you're a Viewer, it's read-only to you. "Overall Ready" only shows true once every applicable type is confirmed.

6. Departmental views

Departments in the navigation gives you a landing page per stakeholder function (HR, Security, Facility, IT, Lobby) instead of digging through the full resource list: HR sees every field on every resource in scope, and the other four each show what's still awaiting their confirmation for onboarding and offboarding. Anyone logged in can look at any department's page — it's a shared coordination view, not gated by your own function.

7. Statistics

Statistics is split into two pages, each with its own access:

- **Statistics HR** — turnover trend (stable/increasing/decreasing, based on the last 3 months of departures), total resources, Headcount by site/country, employment type ratios, gender ratios. Visible to the HR and Owner functions, and Super Admin.
- **Statistics Facility** — Headcount by Building/Wing/Floor. Visible to the same three, plus the Facility function.

> "Headcount" follows the definition configured for your deployment — it is not simply "everyone with ACTIVE status." Ask your Super Admin if you need the exact rule for your organization.

8. Organization

Organization is a per-site org chart: the site manager shown at the top, then their direct reports laid out side by side, and each manager's own team nested underneath as an indented list. Visible only to HR, Owner, and Super Admin. If you only have one site in scope you land straight on its chart; otherwise you pick a site first. A resource with no manager on record (or whose manager isn't at this site) shows in a separate list below the chart rather than silently disappearing.

Use **Export to PDF** (your browser's print dialog, "Save as PDF") to get a file — for a very large or deep org, use landscape orientation and "fit to page width" in that dialog.

9. Your Profile

My Profile, in the top navigation, is available to every logged-in user regardless of role or function. It shows your name, email, role, and site read-only, plus a **Change password** form. For security, a password change doesn't take effect immediately: after submitting, you'll get a confirmation email — the password only actually changes once you click the link in it (valid 30 minutes). This protects you even if someone else were using your already-logged-in session.

10. Requests — feedback, bugs, enhancements

Request, in the footer of every page, opens a form for any logged-in user: your name and site are shown read-only (taken from your account), pick a type (Feedback, Bug, or Enhancement), and write your message. Submitting gives you a request number (e.g. "#42"), emails every Super Admin immediately, and logs it.

Super Admins manage the full list, with search and status filters (New/Open/Closed) and a response/action field per request. When a Super Admin marks a request Closed, you get an email confirming it, including whatever they wrote in that response field.

> This is the right channel for anything that isn't working, anything confusing, or any idea for improving CREW — see also **Section 13, Getting help**.

11. Exporting

If you have export access, an **Export CSV** button on the Workforce list downloads exactly what you can see on screen — same site scope, same field masking. There is no separate, less-restricted export path.

12. Logging out

Use **Logout** in the top navigation. This immediately ends your session server-side (not just a client-side redirect) — the idle timeout (30 minutes of inactivity) does the same automatically if you forget.

13. Getting help

Many things that look like bugs (a missing field, a resource you can't see, an account lockout) are deliberate access-control behavior described in this guide, not mistakes. If something is still genuinely wrong, or you'd like to suggest an improvement:

- Use the **Request** link in the footer (see Section 10) — this is the primary channel, tracked and followed up by the team that owns CREW.
- See the **Support** link in the footer for who owns this application.