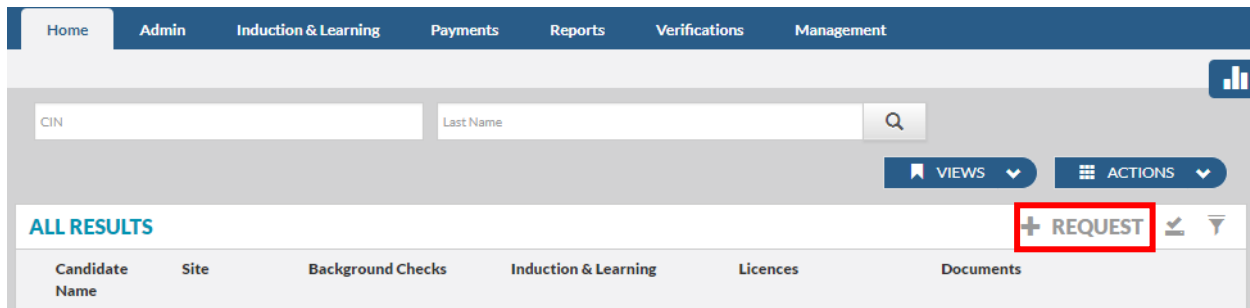


STEP-BY-STEP GUIDE TO CREATING, MANAGING, AND TRACKING REQUESTS

Sending a single request

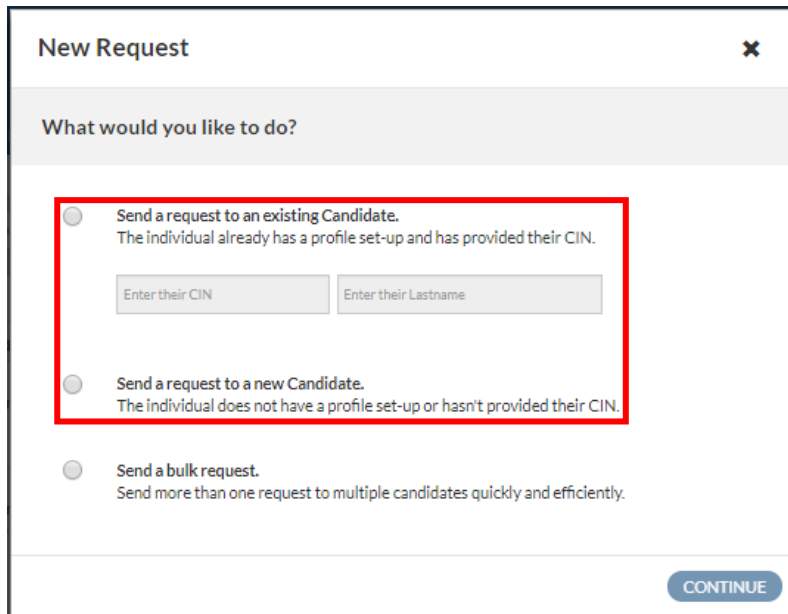
Step 1:

On the Home page, select '+ Request'



Step 2:

Choose the appropriate option – either 'Send a request to an existing Candidate' or 'Send a request to a new Candidate'.



The screenshot shows the 'New Request' dialog box with a close button (X) in the top right corner. The dialog box contains the question 'What would you like to do?' and three radio button options:

- Send a request to an existing Candidate.
The individual already has a profile set-up and has provided their CIN.
Enter their CIN: Enter their Lastname:
- Send a request to a new Candidate.
The individual does not have a profile set-up or hasn't provided their CIN.
- Send a bulk request.
Send more than one request to multiple candidates quickly and efficiently.

A red box highlights the first option and its associated input fields. A 'CONTINUE' button is located at the bottom right of the dialog box.

- Use 'Send a request to an existing Candidate' when the candidate has an account within WorkPro. To 'Send a request to an existing Candidate', you will need to enter the candidate's CIN and their Last name.

- b) Select 'Send a request to a new Candidate' when the candidate does not yet have an account within WorkPro, then select 'Continue'. Complete the Candidate Name and Candidate Email fields.

The screenshot shows a 'New Request' window. On the left is a sidebar with a 'SELECT PACKAGE' dropdown and a list of categories: Candidate Details (with a warning icon), Background Checks, Induction & Learning, Licences & Tickets, and Documents. The main area is divided into two panels. The 'Candidate Details' panel contains the instruction 'Complete the details below and then add each task to include in the request.' and four input fields: 'Candidate Name' (text), 'Candidate Email' (text), 'Requesting Site' (dropdown menu with 'Workpro NZ' selected), and 'Splash/Landing Page' (dropdown menu). The 'Request Summary' panel on the right contains the text 'No tasks in the request.' At the bottom right of the window is a blue 'SEND REQUEST' button.

Step 3:

After following either of the two processes, either select a pre-defined package that you have created to be sent, or select the tasks to be completed. Any selected tasks will appear in the request summary panel.

Select 'Send Request'.

This screenshot is identical to the one above, showing the 'NEW REQUEST' form. A red rectangular box highlights the 'SELECT PACKAGE' dropdown menu in the left sidebar. The rest of the form, including the 'Candidate Details' and 'Request Summary' panels and the 'SEND REQUEST' button, remains the same.

Note: Packages can be created by selecting 'Actions' from the Home page, then 'Packages' & 'Create'.

Sending multiple/bulk Requests

Step 1:

To be able to send a bulk request, you will need to create a package. The instruction for this process is available in the User Guide 'Creating and Managing Packages'.

Once the package is defined, to send a bulk request, select '+ Request', 'Send a bulk request' and 'Continue'.

New Request [Close]

What would you like to do?

- Send a request to an existing Candidate.
The individual already has a profile set-up and has provided their CIN.
Enter their CIN [] Enter their Lastname []
- Send a request to a new Candidate.
The individual does not have a profile set-up or hasn't provided their CIN.
- Send a bulk request.**
Send more than one request to multiple candidates quickly and efficiently.

[CONTINUE]

Step 2:

Choose whether to 'Use a CSV File' or to 'Enter Details Manually' and follow the instruction.

Bulk Request [Close]

This function will allow you to send more than one request to multiple people quickly.

USE A CSV FILE [] ENTER DETAILS MANUALLY []

[CLOSE] [SEND REQUESTS]

Tracking Requests

All sent requests can be tracked from the 'Actions' tab under 'Track Requests'. You have the option of re-sending the request, viewing the request or deleting the request.