

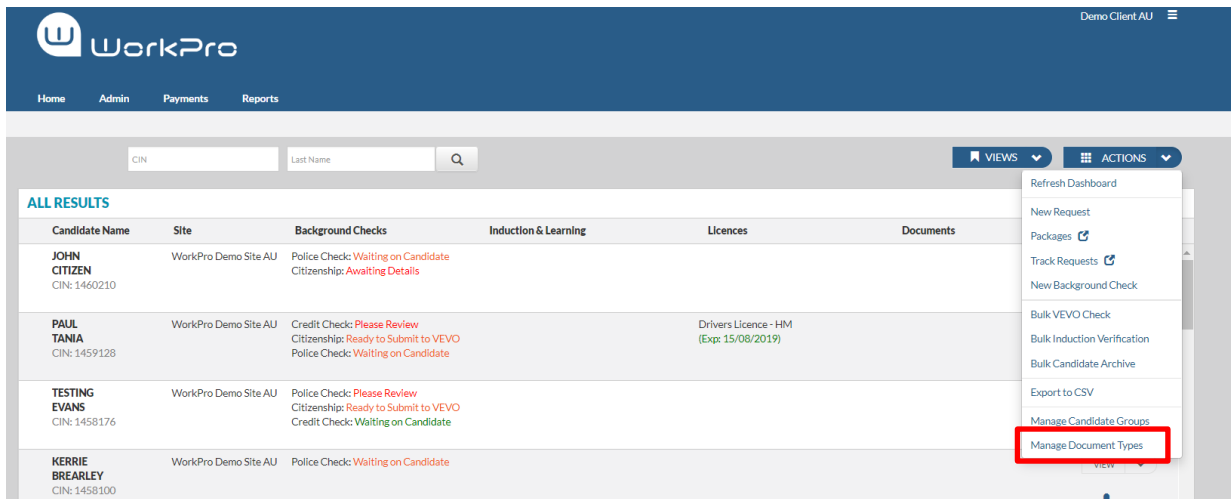


## DOCUMENT MANAGEMENT FUNCTION

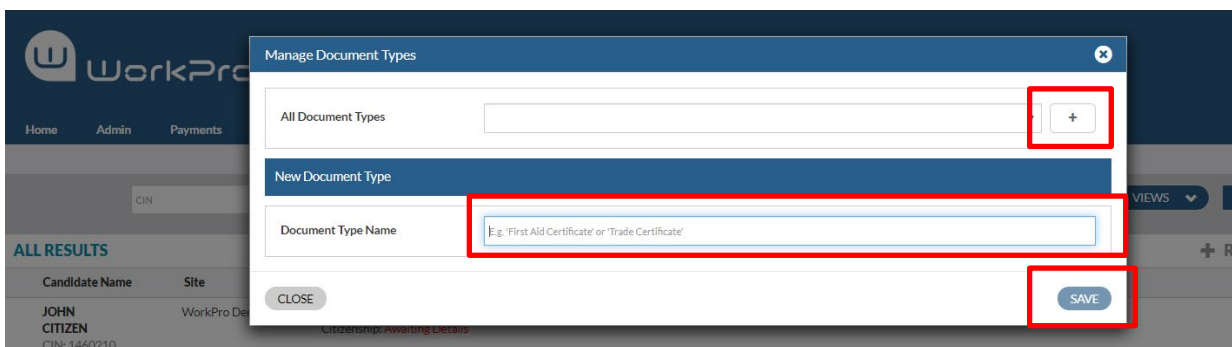
WorkPro’s document management function allows you to define and configure documents that you would like a worker, group of workers or an entire workforce to upload, and for you to monitor, as part of their engagement.

Customers can define an unlimited number of documents and have the freedom to administer in line with changing business needs.

### STEP 1: - Log in to WorkPro, select ‘Actions’ and ‘Manage Document Types’



### STEP 2: Choose +, enter the Document Type Name and ‘save’



Once defined, the document will appear in the drop-down list.

### STEP 3: - Select if you’d like to show an expiry date on your Administration dashboard AND configure mandatory requirements

**Key Note:** the 'Default Fields' will always be shown to the candidate to enter as part of their upload. However, you can elect to show SOME of the information on the Administration dashboard, primarily the 'Issue Date' and 'Expiry Date'. Select 'yes' to display on the dashboard. You can change this at any time.

**Manage Document Types**

All Document Types: A client

**Edit Document Type**

Document Type Name: A client

**Default Fields**

The fields noted below are always requested of the candidate in their interface. Some of this information can also be displayed on the Admin dashboard. You can elect to have the date fields on the Admin dashboard. You can switch on the date fields to display here.

Field Name	Mandatory?	Display on Dashboard?
Issue Date	YES	NO
Expiry Date	NO	YES
Description	NO	N/A
Location / Authority	NO	N/A
File / Image Front	NO	N/A
File / Image Back	NO	N/A

#### STEP 4: Define Custom Fields

It is possible to add any custom information you would like the candidate to enter as part of the upload, e.g. Issuing Body, Policy Number.

To define any custom fields, select + and enter the information required. You will need to enter a Field Name and select the input type from the Field Type dropdown menu. You can also select whether the information is mandatory or non-mandatory.

**Custom Fields**

You can define additional information you'd like to collect about the document here. E.g. *Policy Number, Registration Number, Sum Insured.*

These fields will be requested of the candidate, but will not be displayed on the Admin dashboard.

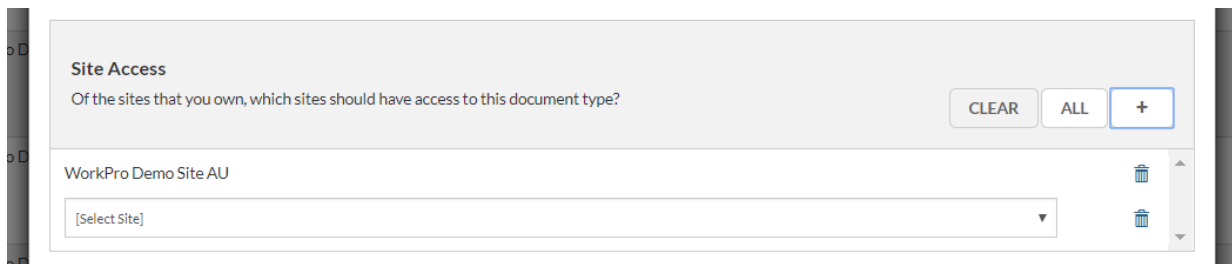
+

Field Name	Field Type	Mandatory?
E.g. Policy Number, Sum Insured		NO

#### STEP 5: Select the Site Access

If your organisation has more than one 'Site' established, you can dictate which sites have access to viewing the

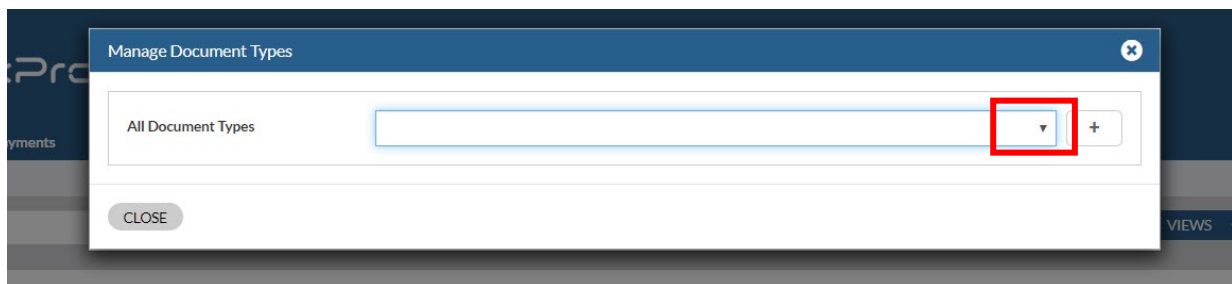
defined documents and able to add the document to a candidate request. You can also change these at any time by 'editing' the document (see below). Drop down the list, select some or all sites that your organisation owns and 'save'.



### STEP 6: Administering Existing Documents

Once the documents are defined, they can be edited/updated, or deleted by selecting 'Actions', 'Manage Document Types' and selecting the document from the drop-down menu.

Once updated, 'save'. Note: the changes will not change documents that have already been uploaded by a candidate.



### STEP 7: Adding a Document to a Package or Candidate Request

Once a document is defined, it can be added to a package or you can send a single candidate request.

To add a document to a package or request, select 'Actions' and 'Packages', create or open the package, select 'Documents' from the request list, select the document/s that is displayed in the list and add to the package.

SELECT PACKAGE ▾

Candidate Details ⚠

Background Checks

Induction & Learning

Licences & Tickets

**Documents** ▶

Reference Check

Medical Check

### Documents

Select the documents for the candidate to provide.

Search Documents 🔍

- Birth Certificate
- Certificate III Hospitality
- Consent to conduct Child Protection Records Check
- CPR
- CSE
- Custom Field Cert Type
- First Aid Certificate
- Indemnity Insurance Document
- New Documnet TType
- Professional Development Program
- Public Liability
- RN Test Doc
- Ron's Document Type
- Sample type
- Some Certificate
- Some Custom Cert Type
- Trade Certificate
- Trenching

### Request Summary

No tasks in the request.

SEND REQUEST