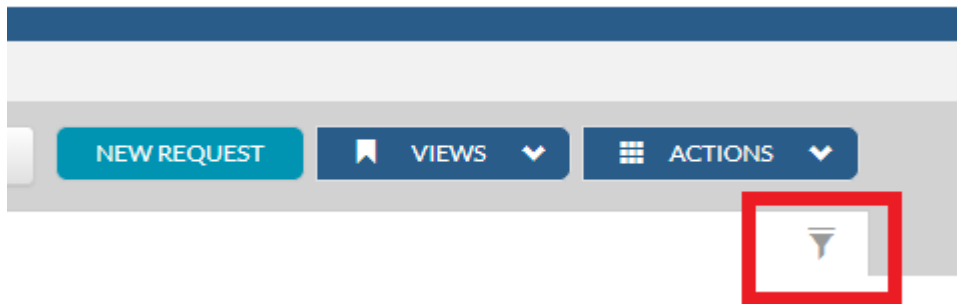


USING FILTERING AND MANAGING GROUPS

FILTERING

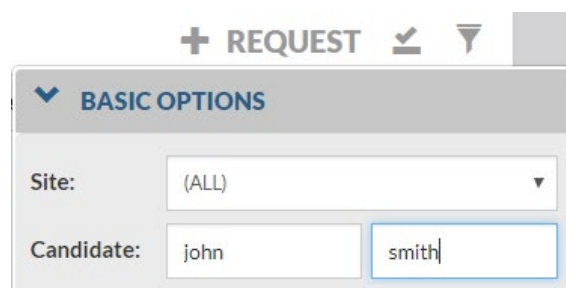
Login to WorkPro with your Administrator username and password.

Select 'Filter'



Filtering Options:

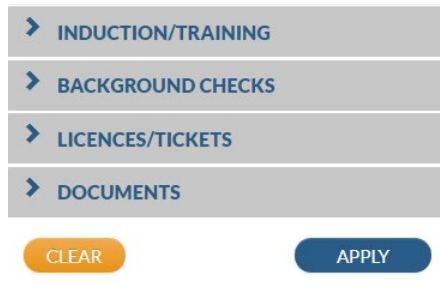
A. Quick Search for a candidate

A screenshot of the 'BASIC OPTIONS' filtering panel. At the top, there are icons for '+ REQUEST', a checkmark, and a funnel. The panel has a grey header with a dropdown arrow and the text 'BASIC OPTIONS'. Below the header, there are two rows of input fields. The first row is labeled 'Site:' and has a dropdown menu with '(ALL)' selected. The second row is labeled 'Candidate:' and has two text input fields; the first contains 'john' and the second contains 'smith'.

Enter the candidate's name for the search and 'Apply'.

B. Service Search

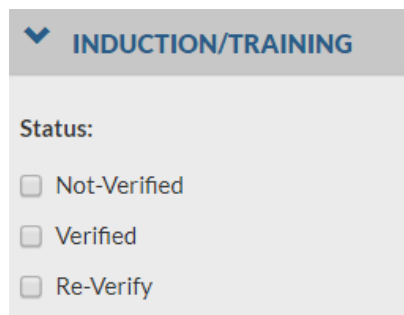
This section can be used to complete searches on a single task, multiple tasks, expiry dates and task status. Filtering allows you to select all WorkPro services.



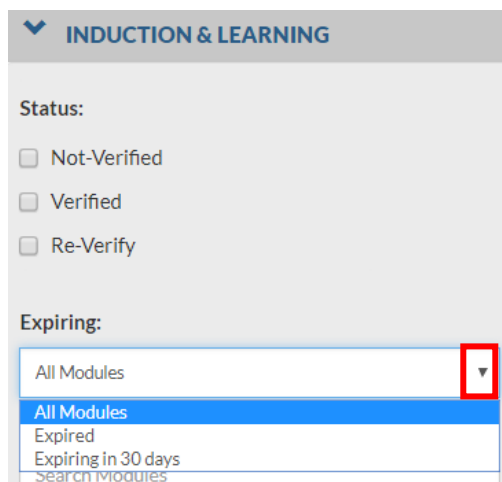
e.g. If you would like to find all workers who have completed the forklift operator safety module, and hold a current forklift licence, who has the rights to work in Australia, select each service and your criteria, and 'Apply'.

1. Induction/Training

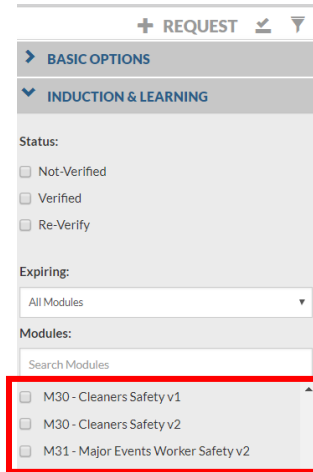
Use the **Induction/ Training** tab to view which candidate modules that are verified or not verified or need to be re-verified.



This filtering option is ideal to confirm that all candidates training is up to date and certificate produced for every candidate. You can also search for candidate's training that is due to expire.

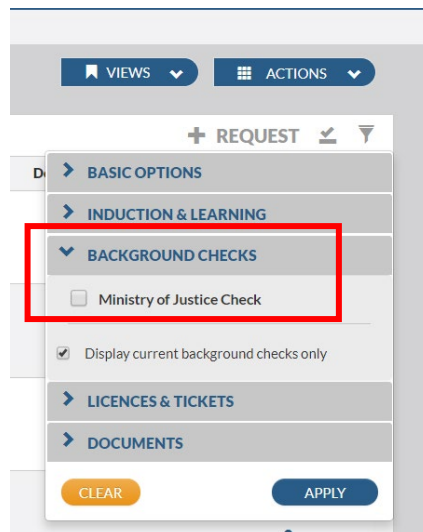


Additionally, you can select a specific module or modules to display all candidate's that have completed certain module or is due to expire.



2. Background Checks

Use the **'Background Checks'** tab to view information relating to any background check.



This filtering option allows you to quickly check progress and status of a candidate's check, particularly those that are finalised and the outcome of the check.

3. Licences & Tickets

This filtering option can be used to search for a particular licence type and/ or expiry.



Selecting 'Expiring' will display:

- All licences

- No Expiry
- Expired
- Expiring in 30 days
- Expiring in 30 to 60 days
- Expiring in 60 to 90 days

Select a 'Type' to search for a specific licence/ ticket.

4. Documents

Use this filtering option to search for a particular document type and/ or expiry.

Selecting 'Expiring' allows you to view:

- All documents
- No expiry
- Expired
- Expiring in 30 days
- Expiring in 30 to 60 days
- Expiring in 60 to 90 days



You can use the 'Name and/ or Type' to search for a document.

Exporting Data:

Once the filtering is applied, it is possible to export the data to a CSV file.

To do this, apply the search criteria, and select the export button:

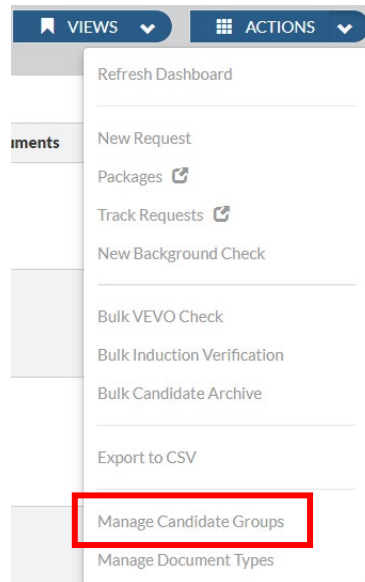
Views Actions

+ REQUEST  

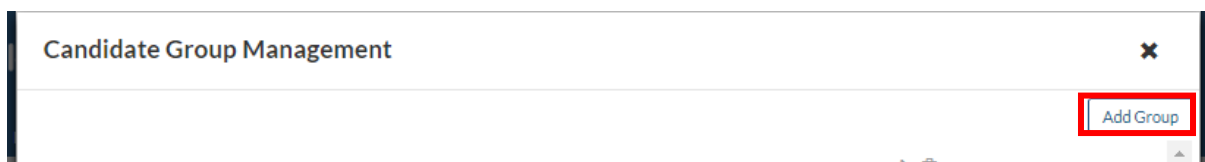
MANAGING GROUPS

'Groups' is configurable and allows you to logically assemble candidate's to suit your business. This may be certain roles within your business, groups of workers, region, or specific projects. Unlimited Groups can be created.

Step 1: To create a 'Group', select 'Actions' from the Home view, then select 'Manage Candidate Groups' from the drop-down.



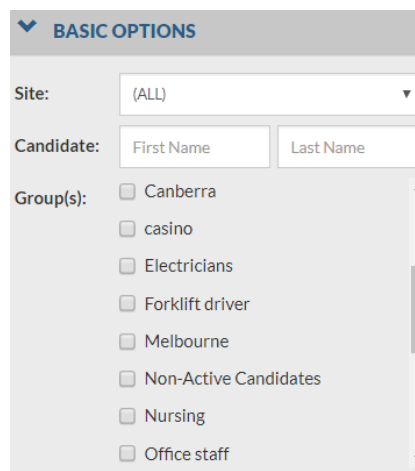
Step 2: Select 'Add Group'. Enter a Group Name and 'Save'.



Once a Group has been defined, you can quickly edit or remove them.



Viewing Groups



Groups can be viewed by selecting 'Filter' from the Home view, and 'Basic Options'.



Adding individuals to Groups

Once a Group has been defined, you can quickly see, add and remove a person from a group by selecting the blue head icon to the right of the candidates name within the Home view.

ALL RESULTS + REQUEST  

Candidate Name	Site	Background Checks	Induction & Learning	Licences	Documents
TANIA EVANS CIN: 1348691	WorkPro Demo Site AU	Police Check: Please Action			VIEW   4

Candidates can be assigned or removed by ticking the appropriate group.

