



**iPRO**

## **Worker Compliance Guide**

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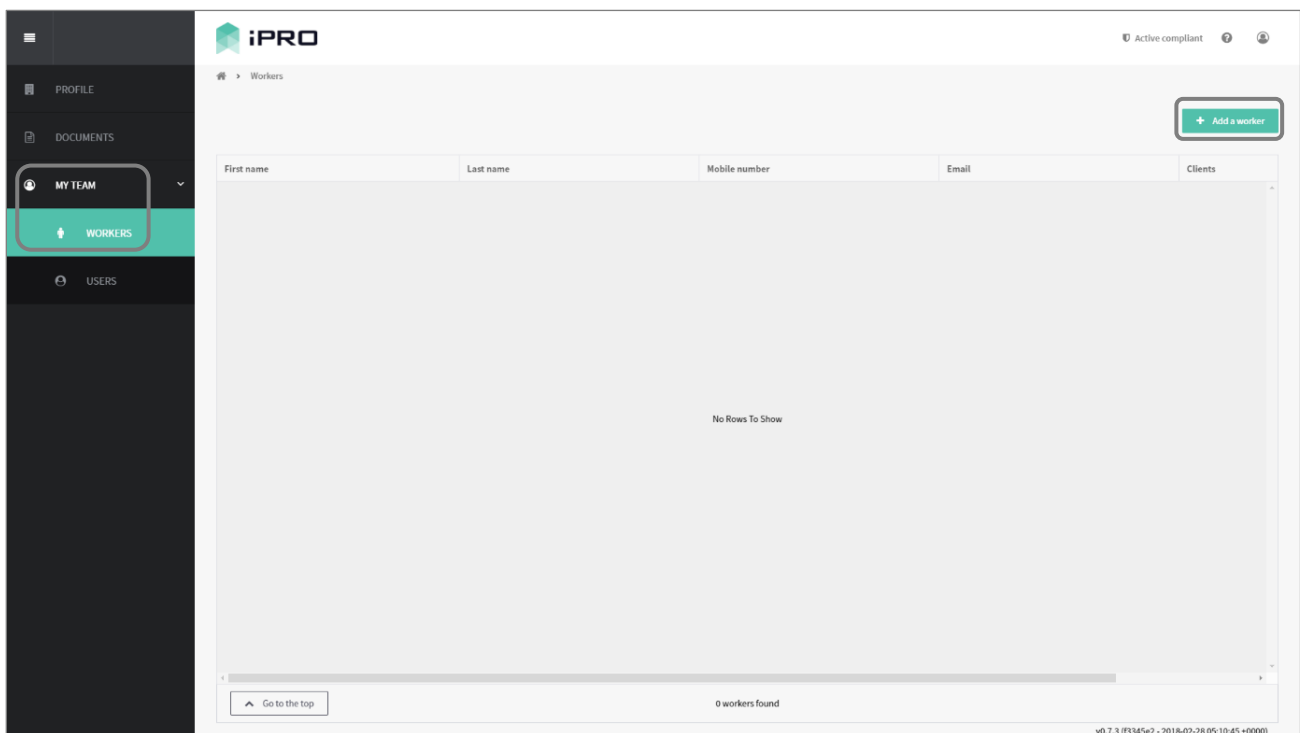
This guide provides you with the steps to take in setting up your worker to complete the assessment and credentials, induction and install the iPRO Access Mobile App.

## 1. Add a Worker in iPRO

### Quick Tips

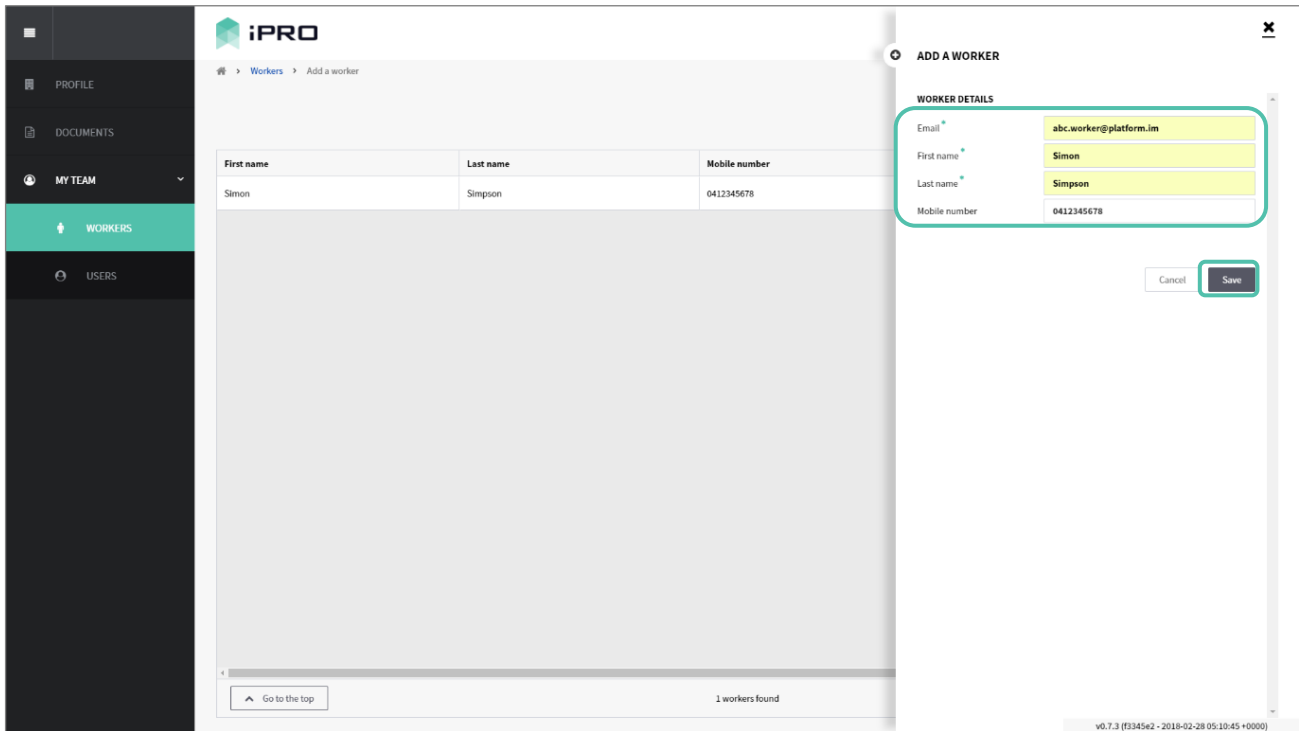
- A worker is defined as one of your employees who will attend a client site.
- A user is defined as an employee who will access the iPRO platform to view or manage your contractor compliance (administration).

1. Click **'My Team'** from the left hand navigation menu.



2. Click **'Workers'** from the left hand navigation menu (refer above).
3. Click **'Add a Worker'** in the right hand corner (refer above).

4. Complete worker details (refer below).



**ADD A WORKER**

**WORKER DETAILS**

Email *	abc.worker@platform.im
First name *	Simon
Last name *	Simpson
Mobile number	0412345678

Cancel Save

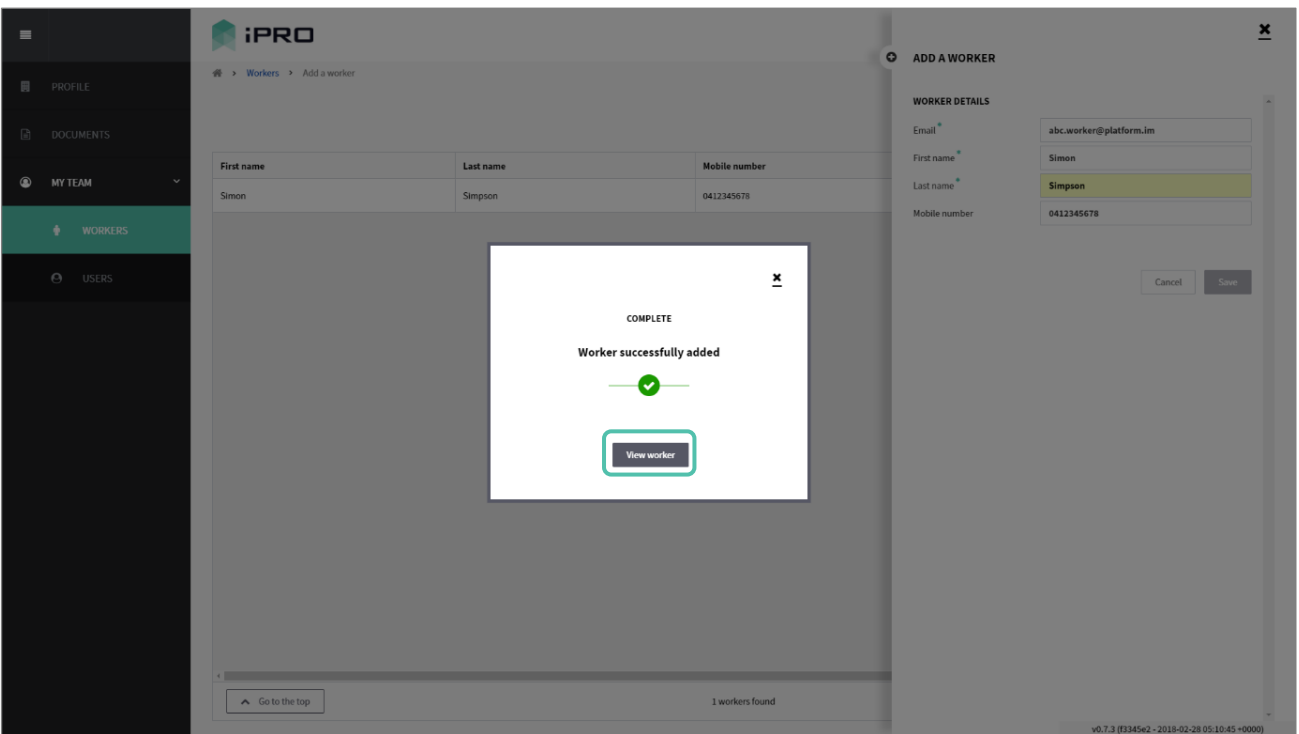
Go to the top 1 workers found

v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000)

5. Click **'Save'** (refer above).

6. The following screen will display.

7. To view the worker, click **'View worker'** (refer below).



**COMPLETE**

Worker successfully added

View worker

Go to the top 1 workers found

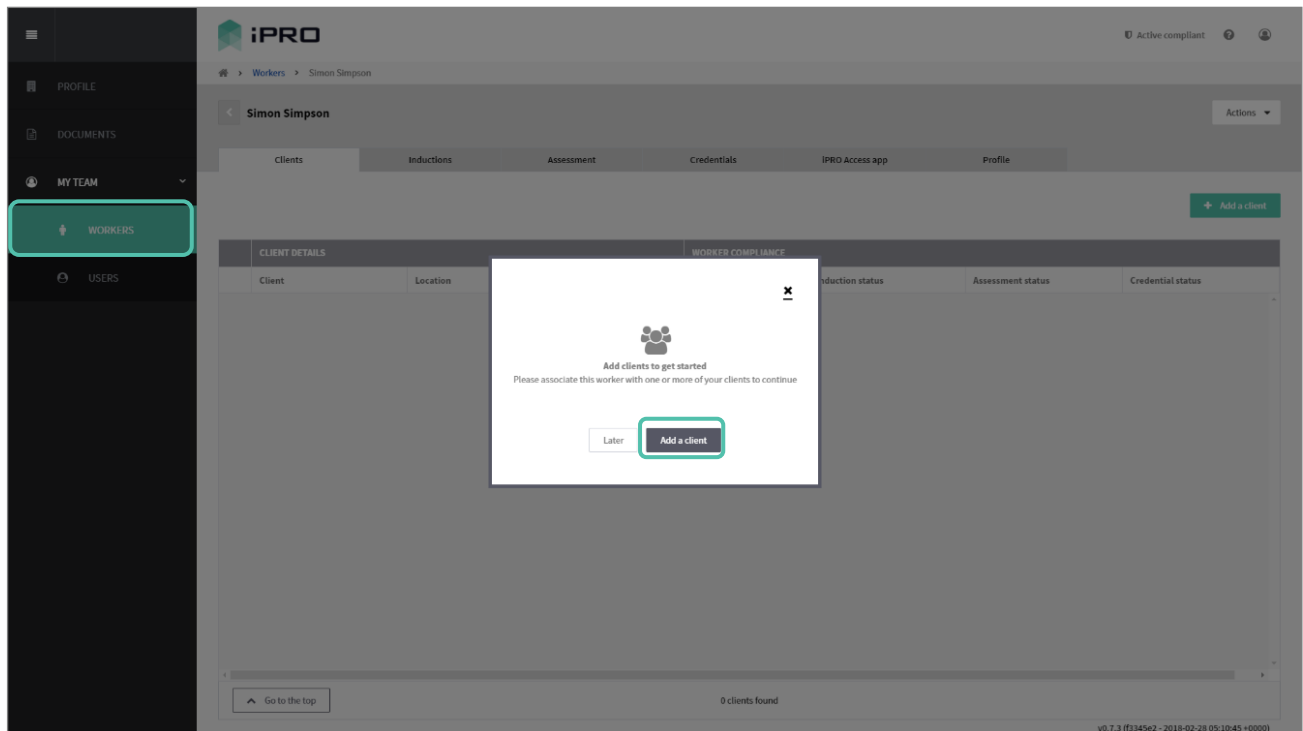
v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000)

## 2. Add a Client

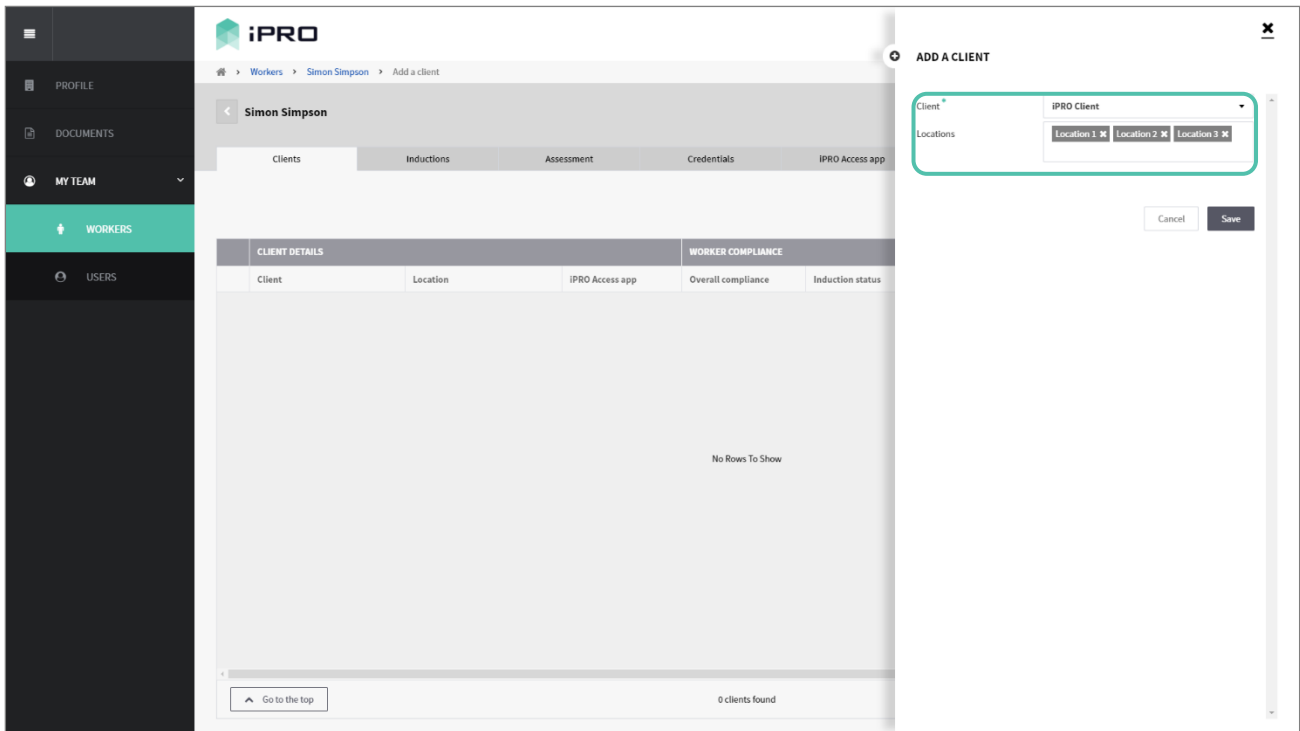
### Quick Tips

- Add client locations for contractor check-in and checkout.
- Client locations drive the contractor's credential requirements.
- QR codes are configured to each location for easy check-in and checkout.

1. Once you have added the worker (as per previous section), the following screen will display.
2. Click **'Add a client'** (refer below).



3. The following screen will display, requiring you to select the client location(s).



**ADD A CLIENT**

Client \* iPRO Client

Locations Location 1 ✕ Location 2 ✕ Location 3 ✕

Cancel Save

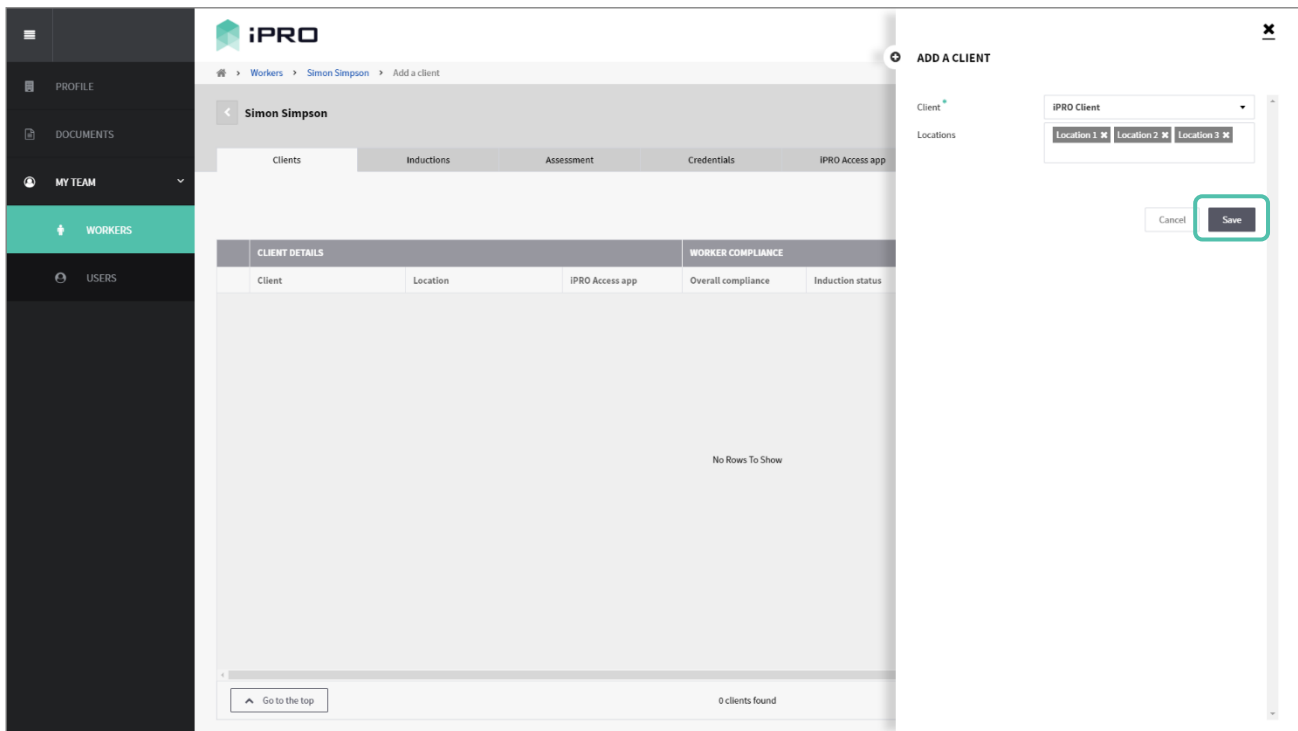
**Simon Simpson**

Clients Inductions Assessment Credentials iPRO Access app

CLIENT DETAILS			WORKER COMPLIANCE	
Client	Location	iPRO Access app	Overall compliance	Induction status
No Rows To Show				

Go to the top 0 clients found

4. Select the client name from the dropdown menu (refer above).
5. The client's location(s) will appear. Click '✕' to remove a location that your worker will not perform work at.
6. Click 'Save' (refer below).



**ADD A CLIENT**

Client \* iPRO Client

Locations Location 1 ✕ Location 2 ✕ Location 3 ✕

Cancel Save

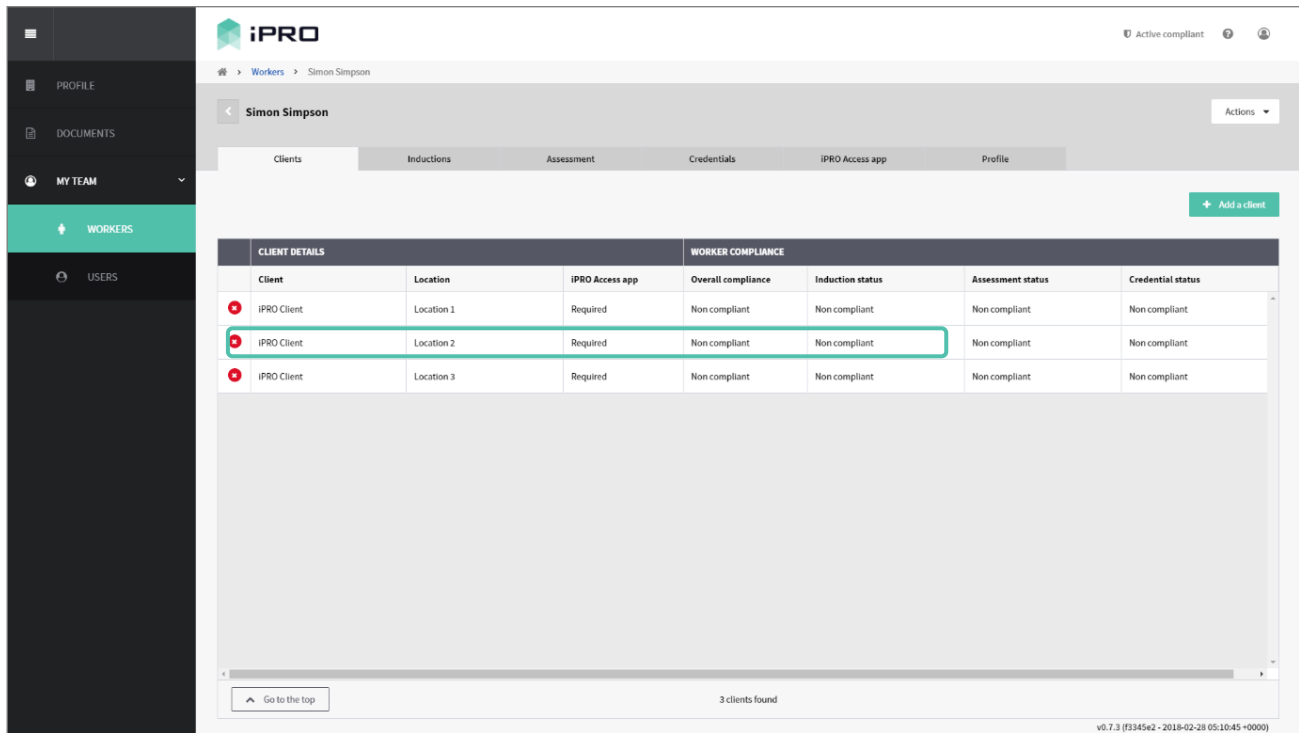
**Simon Simpson**

Clients Inductions Assessment Credentials iPRO Access app

CLIENT DETAILS			WORKER COMPLIANCE	
Client	Location	iPRO Access app	Overall compliance	Induction status
No Rows To Show				

Go to the top 0 clients found

7. Select and click the location you want to view (refer below).



**Simon Simpson** Active compliant Actions

**Clients** Inductions Assessment Credentials IPRO Access app Profile

[+ Add a client](#)

CLIENT DETAILS			WORKER COMPLIANCE			
Client	Location	IPRO Access app	Overall compliance	Induction status	Assessment status	Credential status
IPRO Client	Location 1	Required	Non compliant	Non compliant	Non compliant	Non compliant
IPRO Client	Location 2	Required	Non compliant	Non compliant	Non compliant	Non compliant
IPRO Client	Location 3	Required	Non compliant	Non compliant	Non compliant	Non compliant

[Go to the top](#) 3 clients found v0.7.3 (f334542 - 2018-02-28 05:10:45 +0000)

The detailed view will display (refer below). This display highlights the compliance requirements your worker is required to complete to become iPRO compliant.

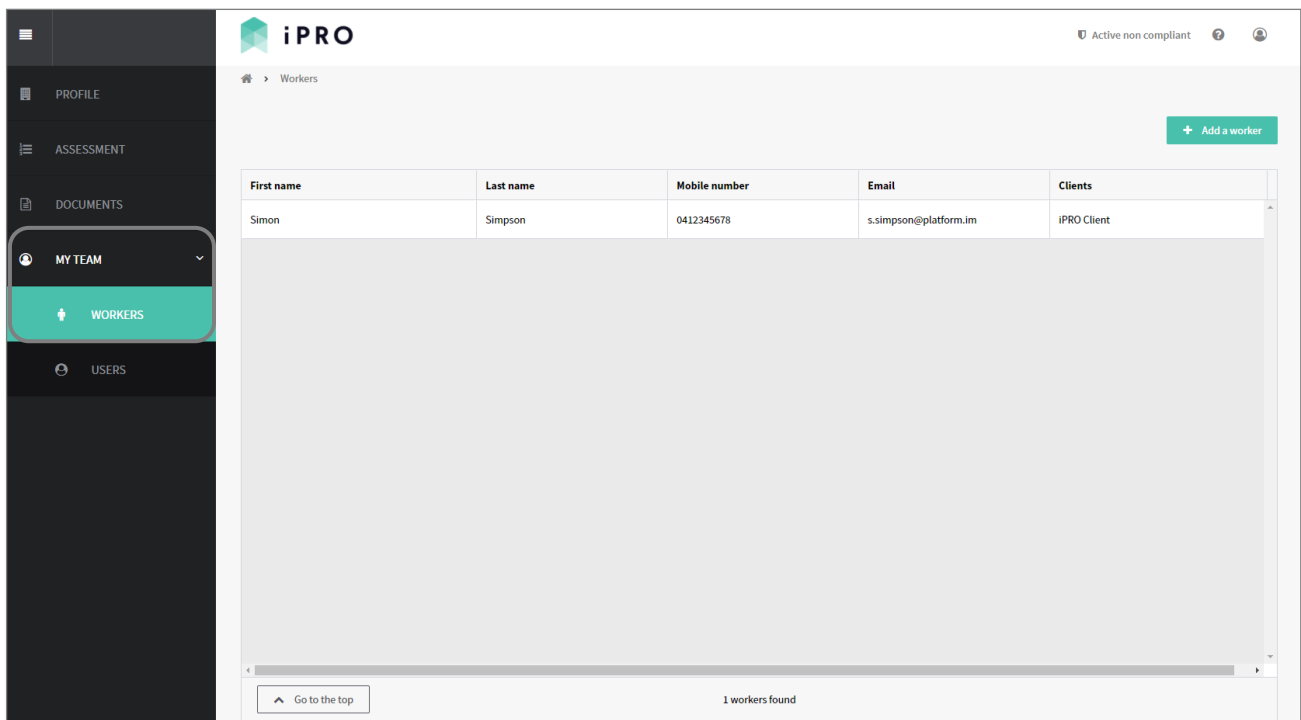
8. Click **'hyperlink'** to complete the required credential or click on a tab across the top of the page (refer above).

### 3. Invite a Worker to Complete Induction

#### Quick Tips

- Invite a worker to complete your client's induction.
- Inductions can be completed by the worker via smartphone, desktop or tablet.
- If inductions are required at a client's site, they must be completed by the worker to be compliant.

1. Click **'My Team'** in the left-hand side menu.
2. Click **'Workers'** in the left-hand side menu (refer below).

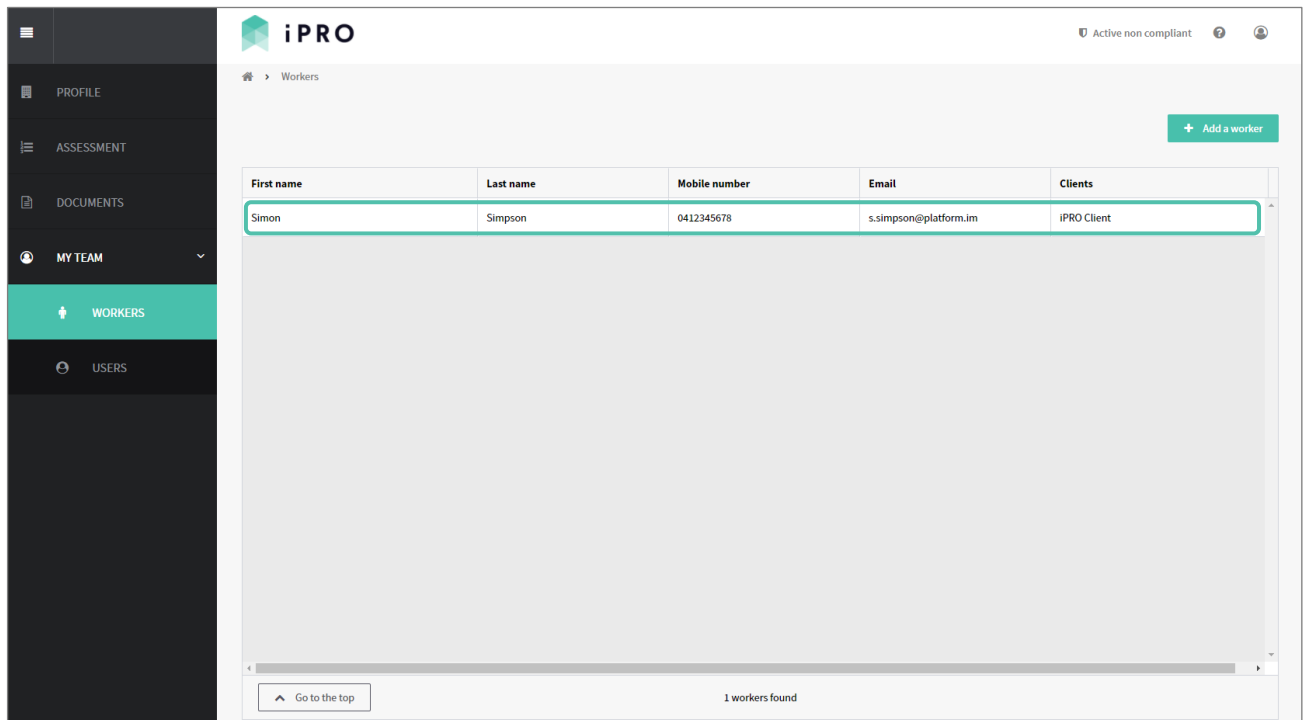


The screenshot shows the iPRO web application interface. On the left is a dark sidebar menu with options: PROFILE, ASSESSMENT, DOCUMENTS, MY TEAM (selected), WORKERS (highlighted in green), and USERS. The main content area has the iPRO logo at the top left and 'Active non compliant' status at the top right. Below the logo is a breadcrumb 'Workers'. A green '+ Add a worker' button is in the top right of the main area. A table lists workers with columns: First name, Last name, Mobile number, Email, and Clients. One worker is listed: Simon Simpson, 0412345678, s.simpson@platform.im, iPRO Client. At the bottom, there is a 'Go to the top' button and the text '1 workers found'.

First name	Last name	Mobile number	Email	Clients
Simon	Simpson	0412345678	s.simpson@platform.im	iPRO Client



3. Select and click the worker to complete the induction (refer below).

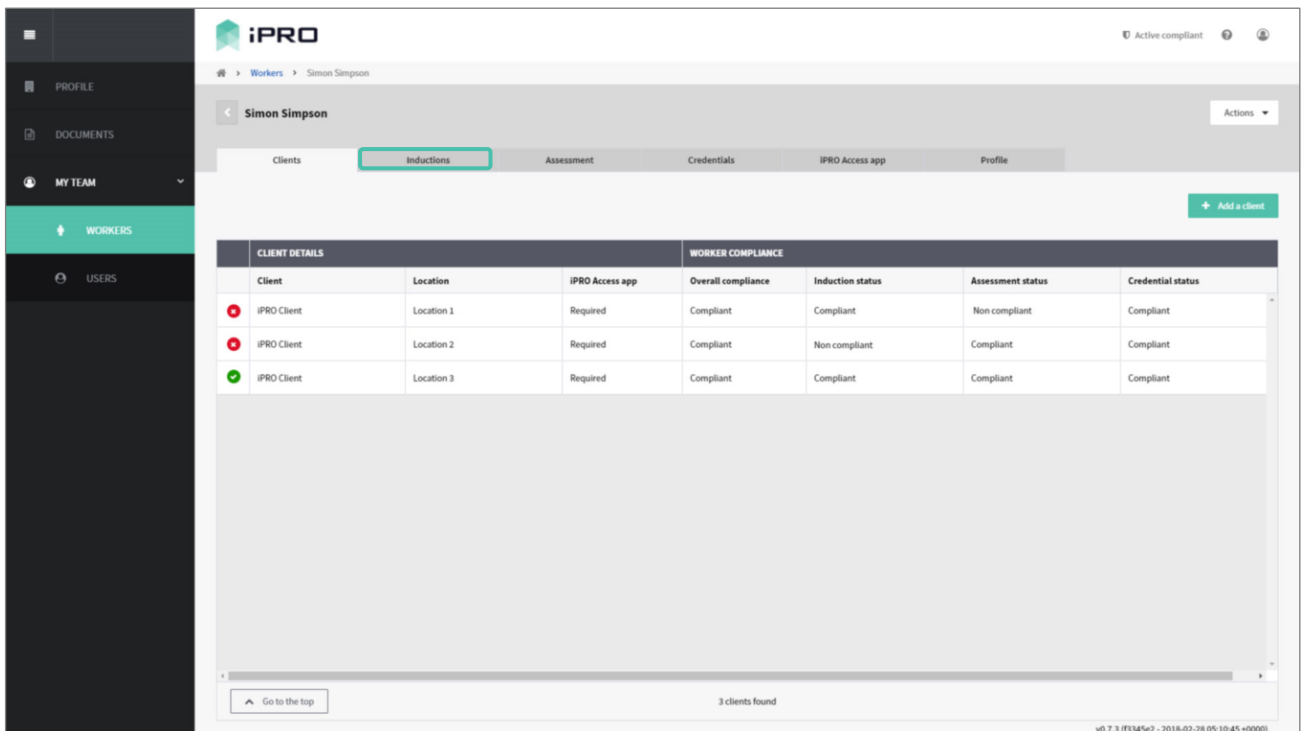


The screenshot shows the iPRO Workers page. The left sidebar has a menu with options: PROFILE, ASSESSMENT, DOCUMENTS, MY TEAM, WORKERS (highlighted), and USERS. The main content area shows a table with the following data:

First name	Last name	Mobile number	Email	Clients
Simon	Simpson	0412345678	s.simpson@platform.im	iPRO Client

At the bottom of the table, it says "1 workers found". There is a "Go to the top" button and an "Add a worker" button in the top right corner.

4. Click 'Inductions' (refer below).

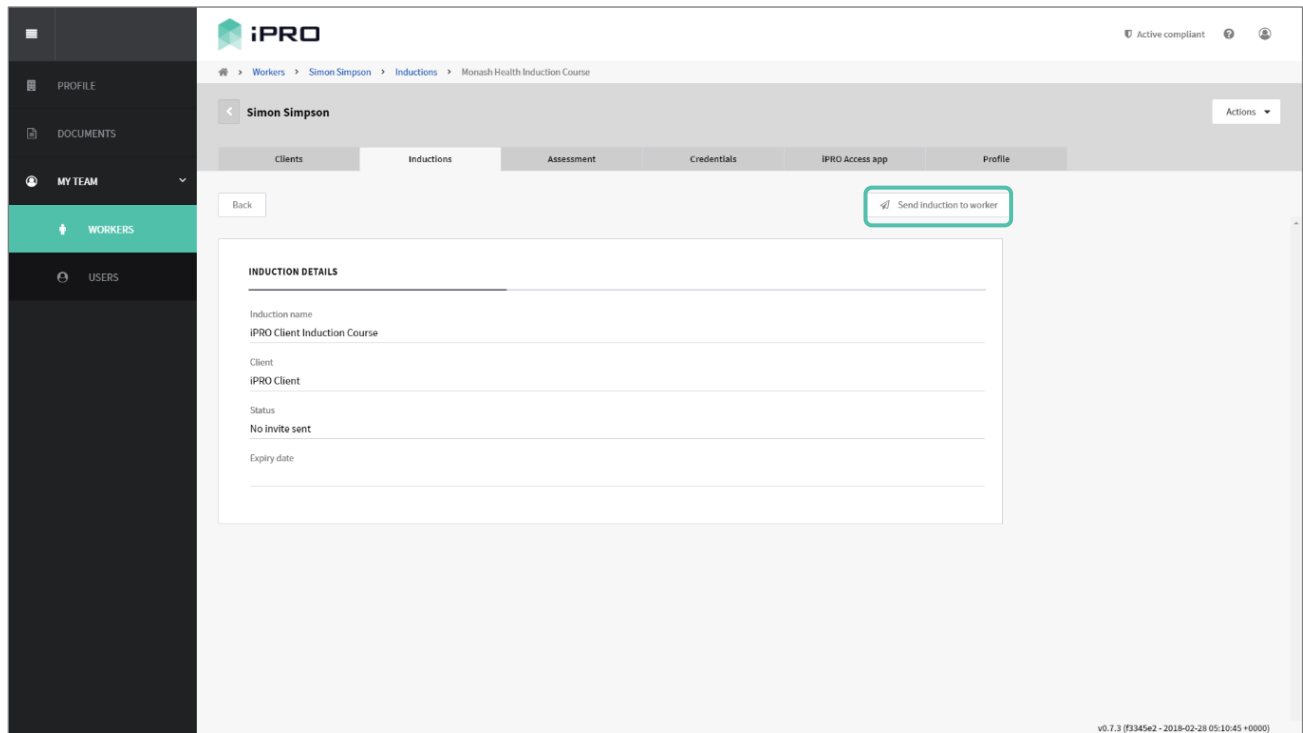


The screenshot shows the iPRO Inductions page for Simon Simpson. The left sidebar is the same as the previous screenshot. The main content area shows a tabbed interface with tabs: Clients, Inductions (highlighted), Assessment, Credentials, iPRO Access app, and Profile. The Inductions tab shows a table with the following data:

CLIENT DETAILS			WORKER COMPLIANCE			
Client	Location	iPRO Access app	Overall compliance	Induction status	Assessment status	Credential status
iPRO Client	Location 1	Required	Compliant	Compliant	Non compliant	Compliant
iPRO Client	Location 2	Required	Compliant	Non compliant	Compliant	Compliant
iPRO Client	Location 3	Required	Compliant	Compliant	Compliant	Compliant

At the bottom of the table, it says "3 clients found". There is a "Go to the top" button and an "Add a client" button in the top right corner. The footer of the page shows the version number: v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000).

5. The following screen will display.
6. Click **'Send induction to worker'** (refer below). *NB: the induction status is No invite sent.*

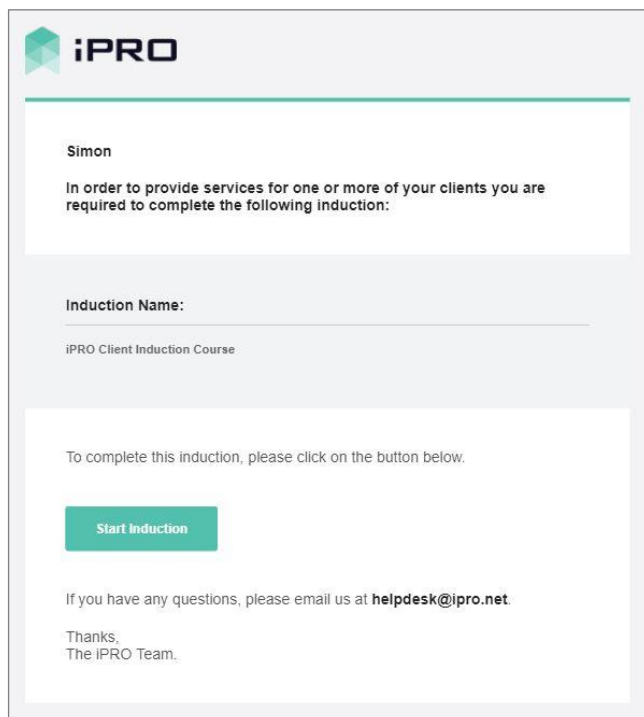


The screenshot shows the iPRO web application interface. On the left is a dark sidebar with navigation options: PROFILE, DOCUMENTS, MY TEAM, WORKERS (highlighted), and USERS. The main content area has a breadcrumb trail: Workers > Simon Simpson > Inductions > Monash Health Induction Course. Below this is a tabbed interface with tabs for Clients, Inductions (selected), Assessment, Credentials, iPRO Access app, and Profile. A 'Back' button is in the top left of the main area, and a 'Send induction to worker' button with a megaphone icon is in the top right. The 'INDUCTION DETAILS' section shows the following information:

INDUCTION DETAILS
Induction name iPRO Client Induction Course
Client iPRO Client
Status No invite sent
Expiry date 

At the bottom right of the screen, the version number 'v0.7.3 (f334562 - 2018-02-28 05:10:45 +0000)' is displayed.

7. This will send an email to the worker requesting them to complete their induction (refer below).



The screenshot shows an email template with the iPRO logo at the top. The content is as follows:

**Simon**

In order to provide services for one or more of your clients you are required to complete the following induction:

**Induction Name:**  
iPRO Client Induction Course

To complete this induction, please click on the button below.

[Start Induction](#)

If you have any questions, please email us at [helpdesk@ipro.net](mailto:helpdesk@ipro.net).

Thanks,  
The iPRO Team.

#### 4. Complete a Worker's Assessment

##### Quick Tips

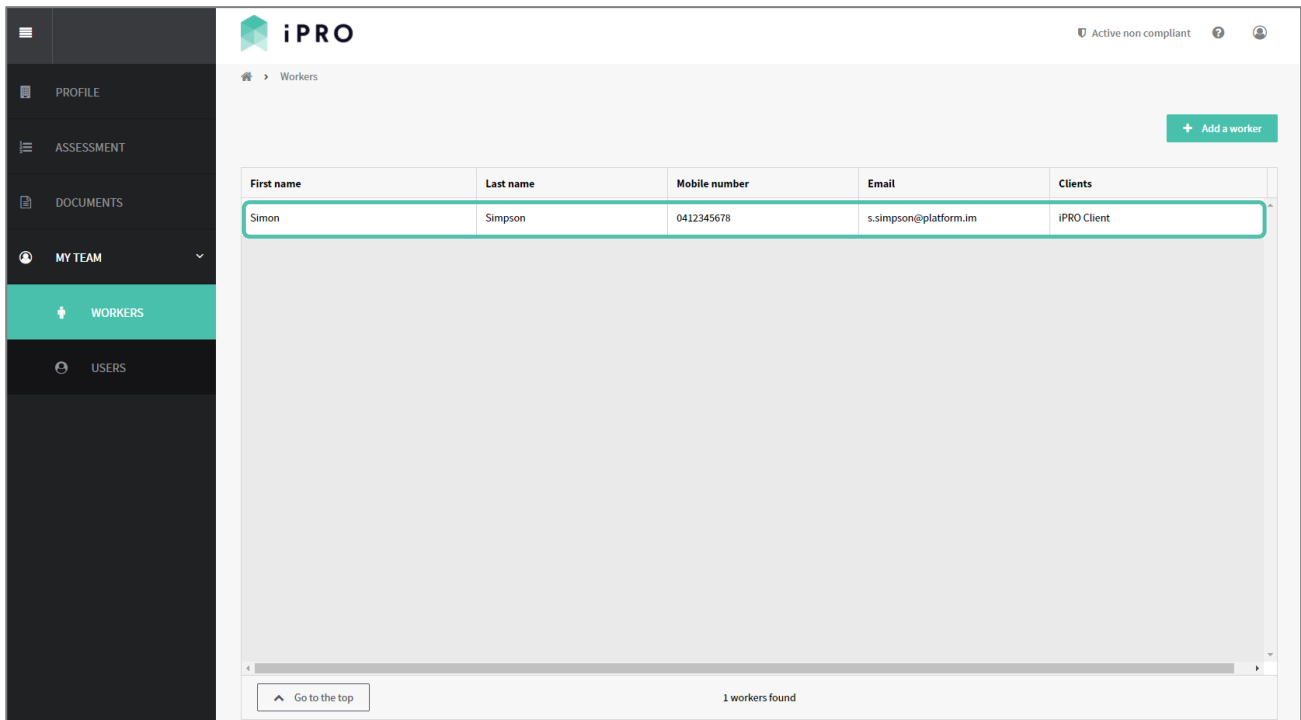
- If an assessment forms part of the client's requirement, it must be completed for the worker to be compliant.
- All questions must be answered for your worker to become compliant.
- The assessment is not complete until all questions have been answered.
- Click 'Save' at any time to complete your assessment later.

1. Click '**My Team**' from the left hand navigation menu.
2. Click '**Workers**' from the left hand navigation menu (refer below).

The screenshot shows the iPRO web application interface. On the left is a dark navigation sidebar with a menu icon at the top. Below it are links for PROFILE, ASSESSMENT, DOCUMENTS, MY TEAM (selected), WORKERS (highlighted in green), and USERS. The main content area has the iPRO logo and a breadcrumb 'Workers'. A green '+ Add a worker' button is in the top right. Below it is a table with columns: First name, Last name, Mobile number, Email, and Clients. The table contains one row for Simon Simpson. At the bottom, there is a 'Go to the top' button and the text '1 workers found'.

First name	Last name	Mobile number	Email	Clients
Simon	Simpson	0412345678	s.simpson@platform.im	IPRO Client

3. Select and click the worker to complete the assessment (refer below).



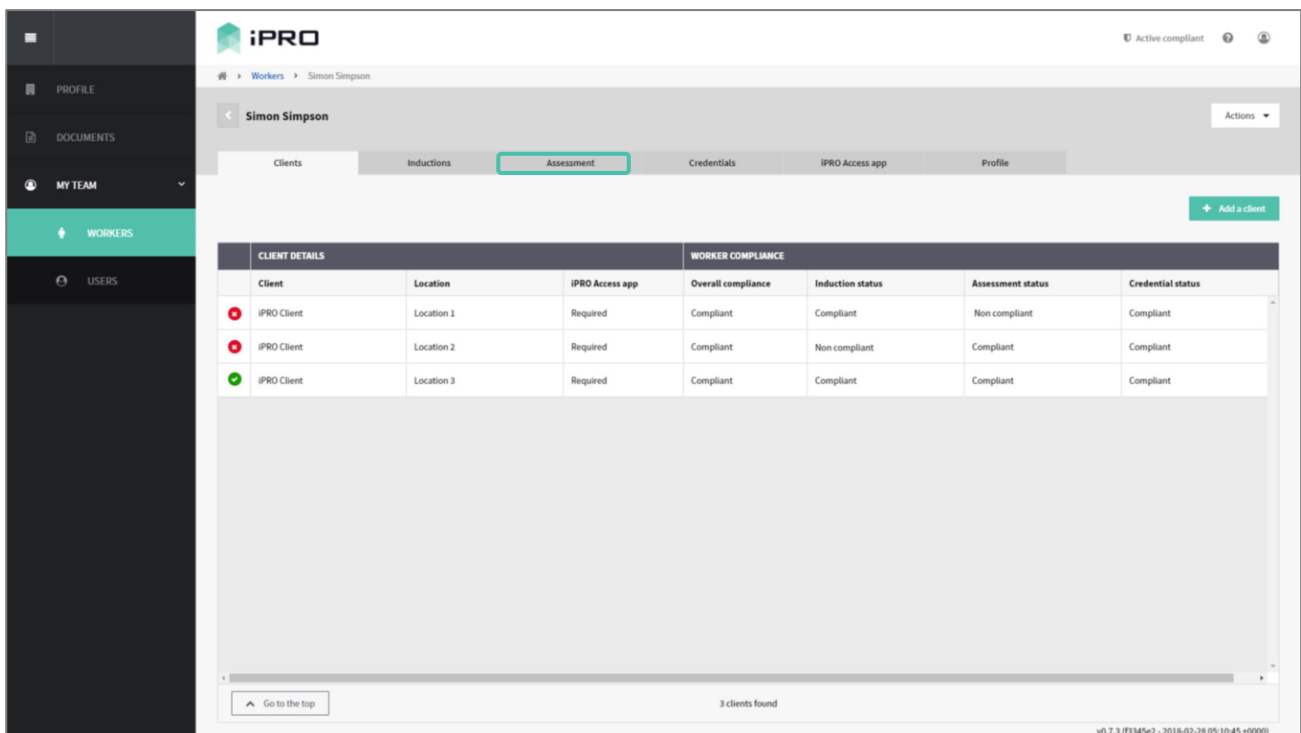
**Workers**

[+ Add a worker](#)

First name	Last name	Mobile number	Email	Clients
Simon	Simpson	0412345678	s.simpson@platform.im	iPRO Client

[Go to the top](#) 1 workers found

4. Click 'Assessment' (refer below).



**Simon Simpson**

[Actions](#)

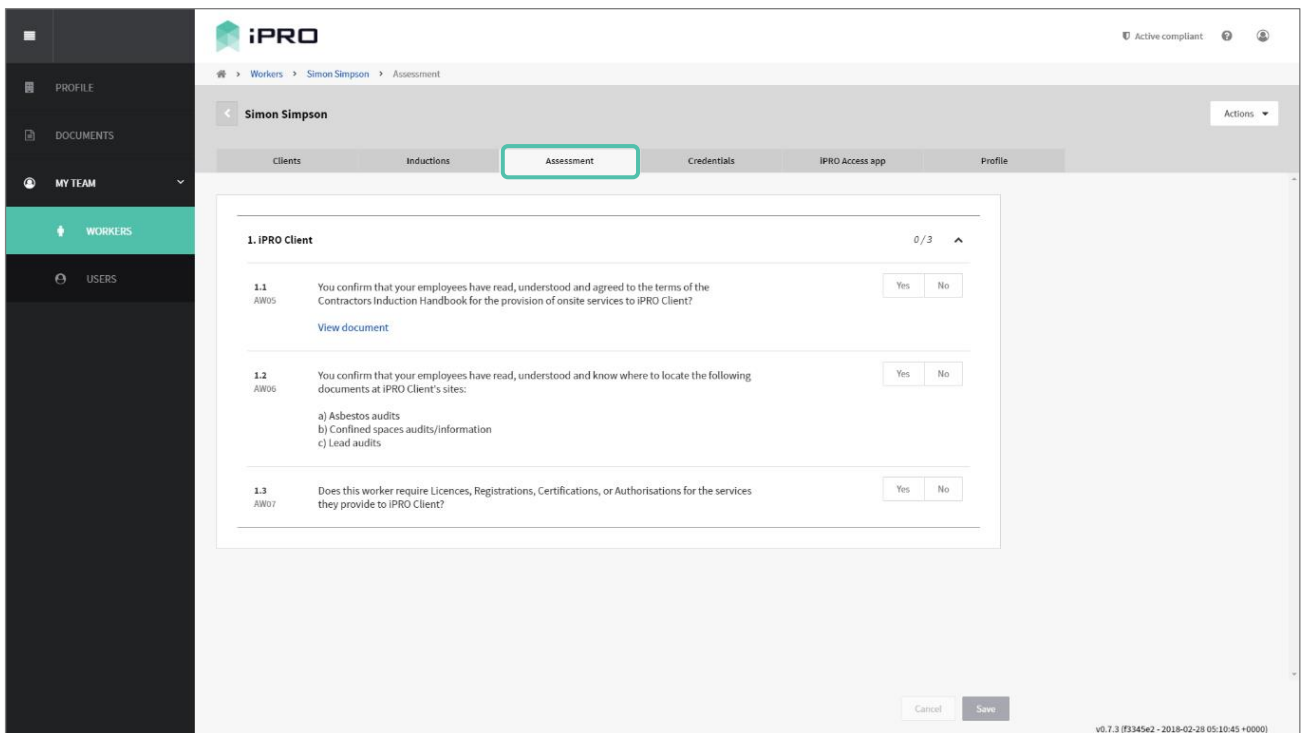
[+ Add a client](#)

CLIENT DETAILS			WORKER COMPLIANCE			
Client	Location	iPRO Access app	Overall compliance	Induction status	Assessment status	Credential status
iPRO Client	Location 1	Required	Compliant	Compliant	Non compliant	Compliant
iPRO Client	Location 2	Required	Compliant	Non compliant	Compliant	Compliant
iPRO Client	Location 3	Required	Compliant	Compliant	Compliant	Compliant

[Go to the top](#) 3 clients found

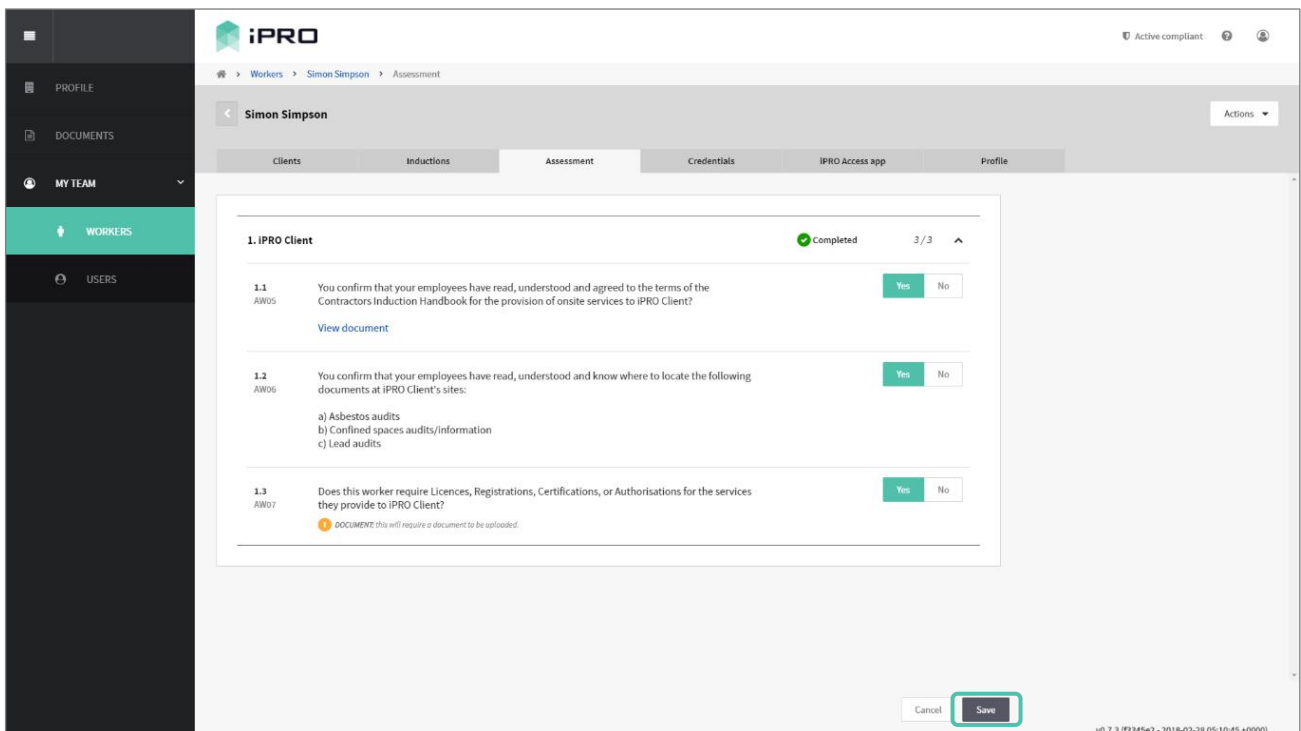
v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000)

5. The following screen will display.



6. Answer all Assessment questions.

7. Click 'Save' (refer below).



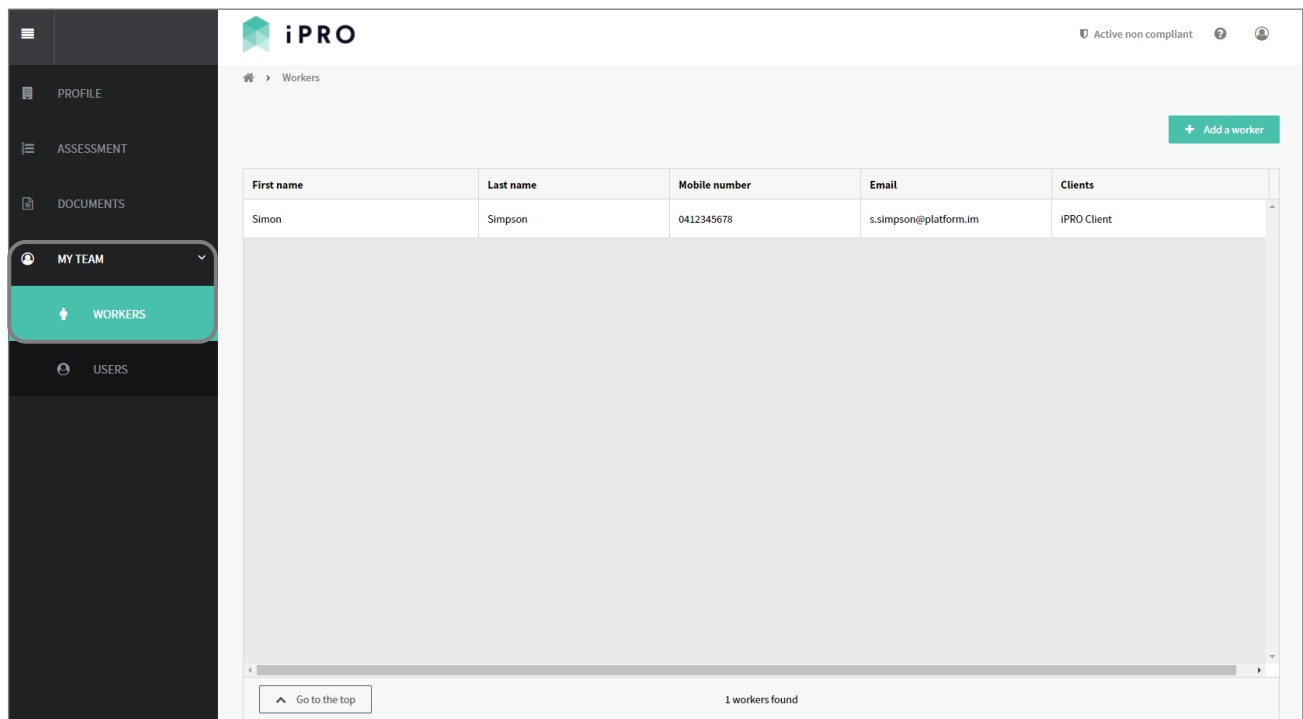
8. The assessment is now complete.

## 5. Add Worker Credentials

### Quick Tips

- The required credentials are based on the client's location.
- Upload additional work credentials.
- Documents need to be in a PDF format to upload.

1. Click **'My Team'** in the left hand navigation menu (refer below).
2. Click **'Workers'** in the left hand navigation menu (refer below).



Active non compliant

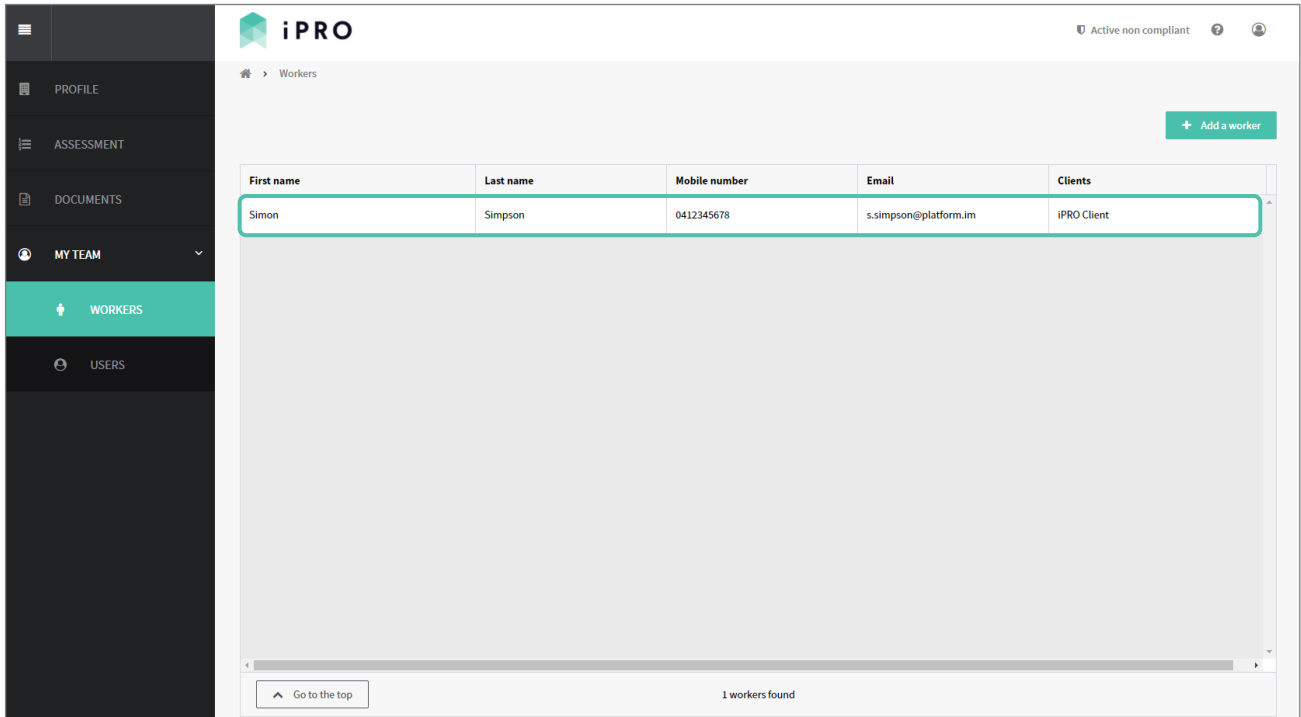
+ Add a worker

First name	Last name	Mobile number	Email	Clients
Simon	Simpson	0412345678	s.simpson@platform.im	IPRO Client

Go to the top

1 workers found

3. Click the required worker to complete the credentials (refer below).



Active non compliant

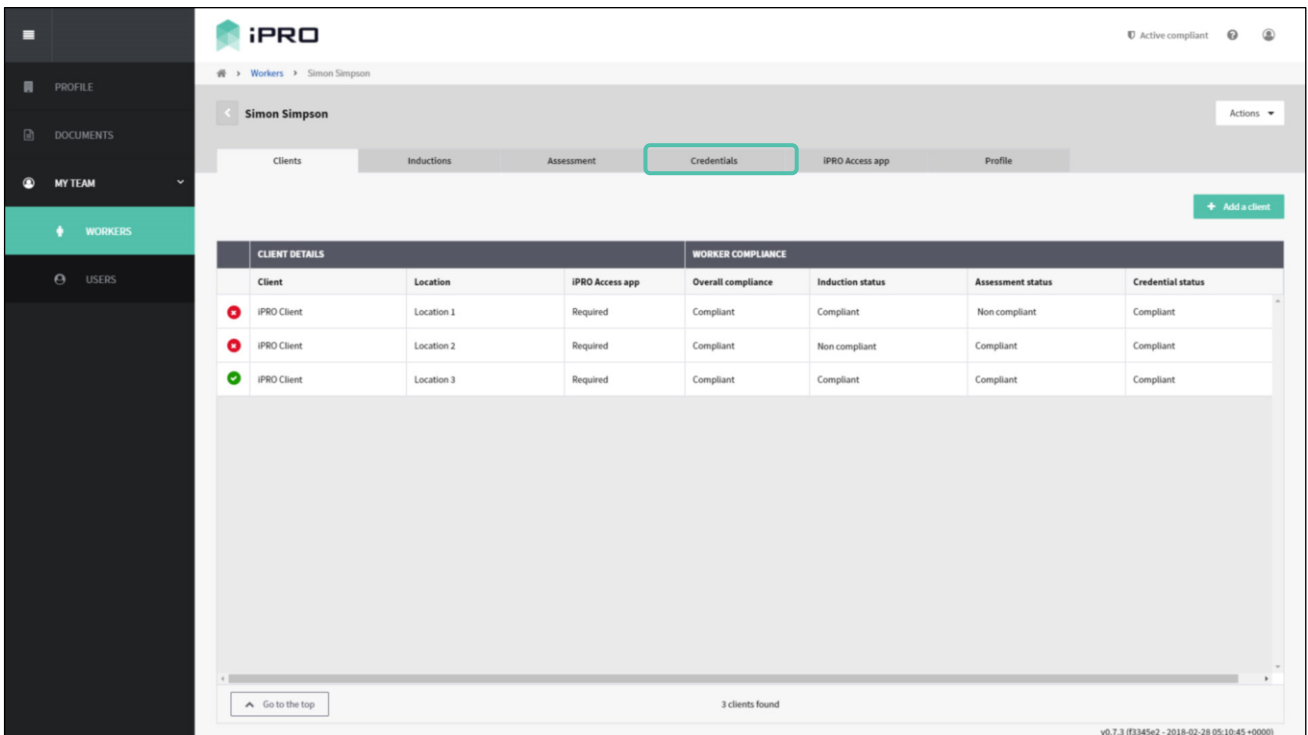
+ Add a worker

First name	Last name	Mobile number	Email	Clients
Simon	Simpson	0412345678	s.simpson@platform.im	iPRO Client

Go to the top

1 workers found

4. Click 'Credentials' tab (refer below).



Active compliant

Simon Simpson

Actions

+ Add a client

CLIENT DETAILS				WORKER COMPLIANCE			
Client	Location	iPRO Access app	Overall compliance	Induction status	Assessment status	Credential status	
iPRO Client	Location 1	Required	Compliant	Compliant	Non compliant	Compliant	
iPRO Client	Location 2	Required	Compliant	Non compliant	Compliant	Compliant	
iPRO Client	Location 3	Required	Compliant	Compliant	Compliant	Compliant	

Go to the top

3 clients found

v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000)

- The list view of the worker's mandatory credentials will display (refer below).
- Select and click the credential you want to upload (refer below).

Simon Simpson

Actions

Clients Inductions Assessment Credentials iPRO Access app Profile

+ Add a credential

Document name	Status	Period	Expiry date
Individual Licence / Work Credential	Required	Initial	
Police Check	Required	Initial	
Proof of Identity	Required	Initial	

Go to the top

3 credentials found

Export CSV

v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000)

- The following screen will display requiring you to upload your credential.
  - Click **'Upload'** (refer below).
- Note:** Some browsers may require the upload button to be double clicked to open your computer files.

Amanda Love

Actions

Back

Police Check

No file uploaded

DOCUMENT NAME

Document name Police Check

UPLOAD DOCUMENT

File

Upload

0 files uploaded

Allowed file types: pdf

DOCUMENT DETAILS

Certificate number

Issued date DD/MM/YYYY

Expiry date DD/MM/YYYY

Save

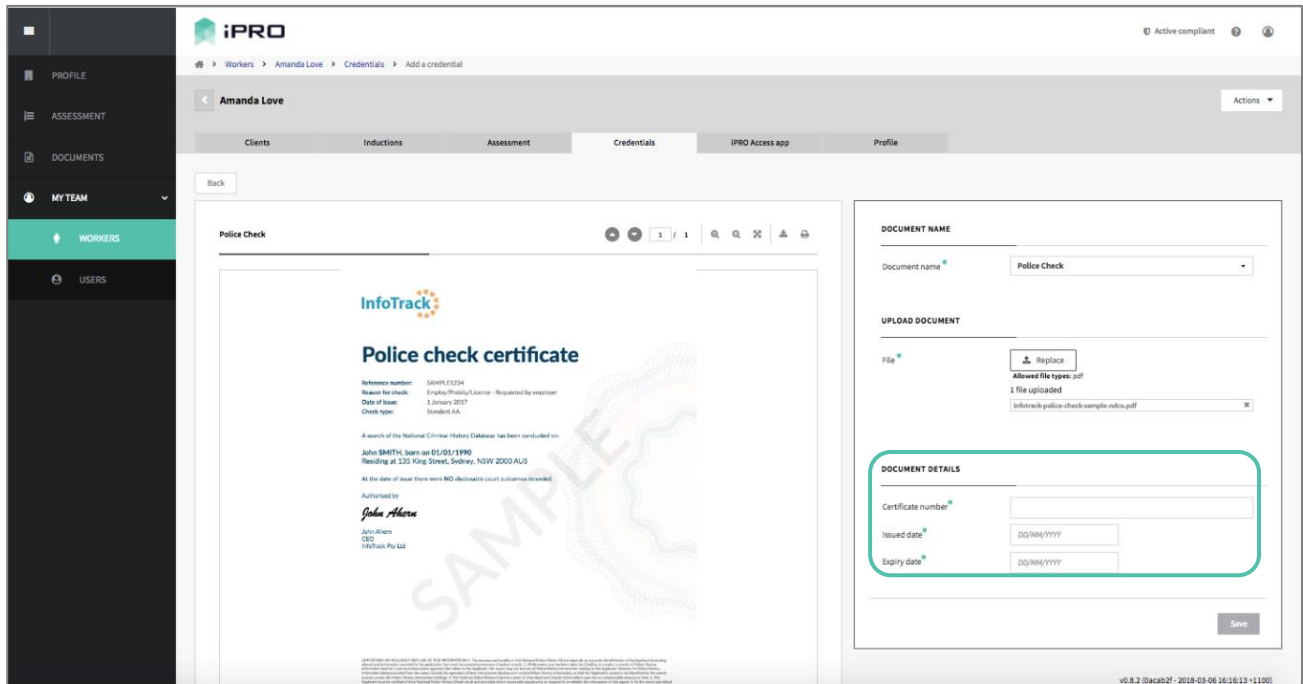
v0.8.2 (baca02f - 2018-03-06 16:16:13 +1100)

- Select the PDF document from your computer files.



10. The document will then load in the viewing pane. Enter the document details (refer below).

**Note:** The credential details required to be entered will vary depending on the credential type. All fields are required to be completed prior to clicking 'save'.



**Document Name**

Document name: Police Check

**UPLOAD DOCUMENT**

File:  Allowed file types: pdf  
1 file uploaded  
infotrack-police-check-sample-ndus.pdf

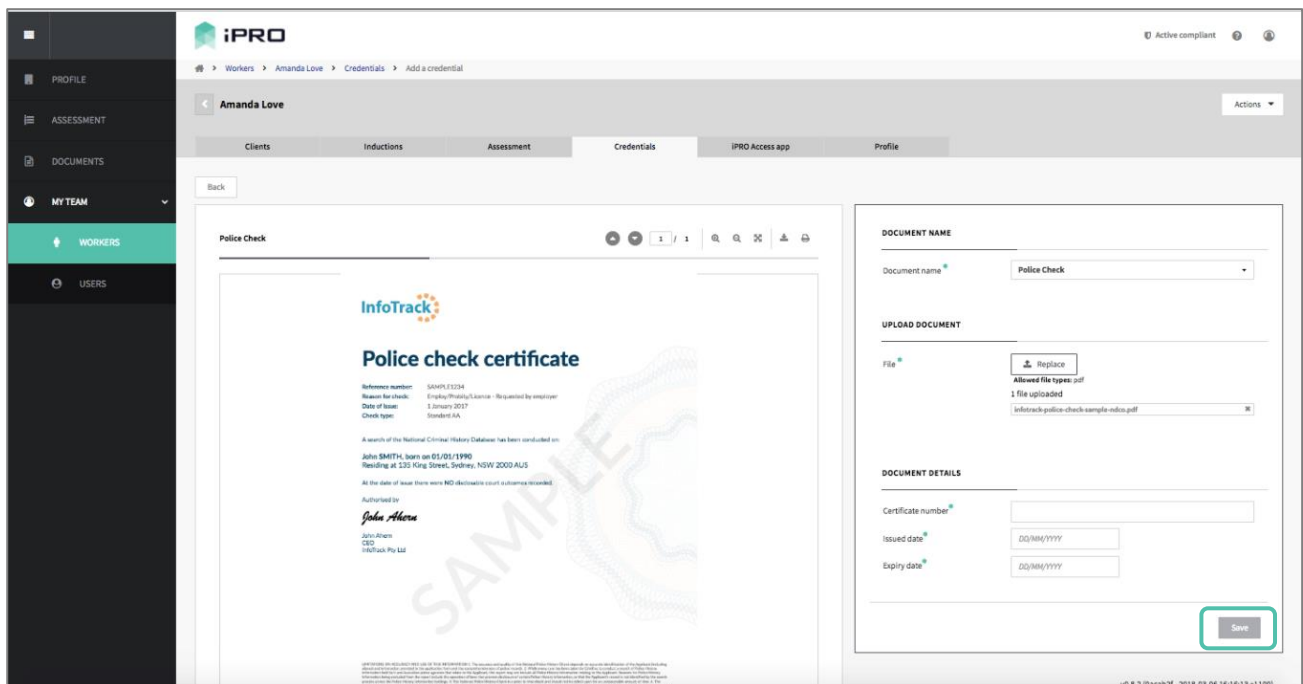
**DOCUMENT DETAILS**

Certificate number:

Issued date:

Expiry date:

11. Click 'Save' (refer below).



**Document Name**

Document name: Police Check

**UPLOAD DOCUMENT**

File:  Allowed file types: pdf  
1 file uploaded  
infotrack-police-check-sample-ndus.pdf

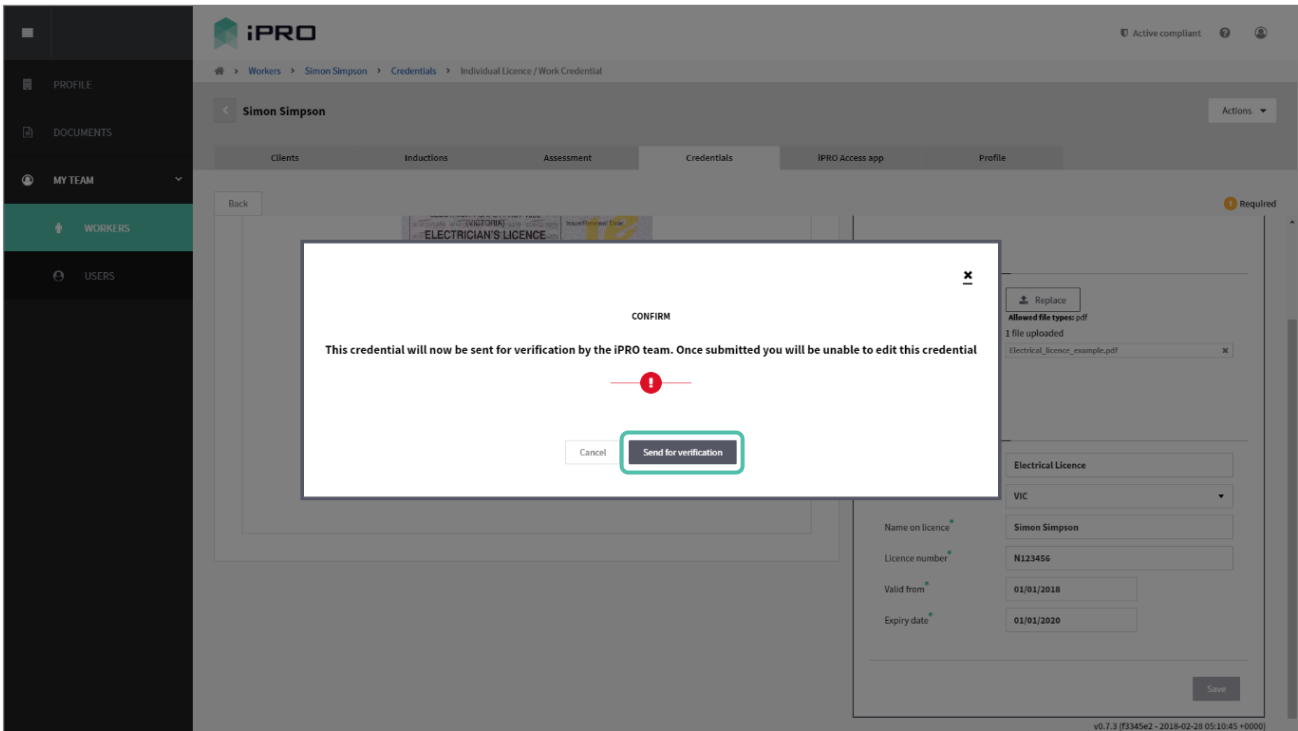
**DOCUMENT DETAILS**

Certificate number:

Issued date:

Expiry date:

12. The following screen will display, click '**Send for verification**'.



The screenshot shows the iPRO web interface. On the left is a dark sidebar with navigation links: PROFILE, DOCUMENTS, MY TEAM, WORKERS (highlighted), and USERS. The main content area shows the breadcrumb path: Workers > Simon Simpson > Credentials > Individual Licence / Work Credential. Below this is a tabbed interface with tabs for Clients, Inductions, Assessment, Credentials (active), iPRO Access app, and Profile. A modal dialog titled 'CONFIRM' is centered on the screen. The dialog contains the text: 'This credential will now be sent for verification by the iPRO team. Once submitted you will be unable to edit this credential'. Below the text is a red exclamation mark icon. At the bottom of the dialog are two buttons: 'Cancel' and 'Send for verification' (which is highlighted with a green border). In the background, the 'Electrical Licence' form is visible, showing fields for Name on licence (Simon Simpson), Licence number (N123456), Valid from (01/01/2018), and Expiry date (01/01/2020). There is also a 'Replace' button and a file upload section.

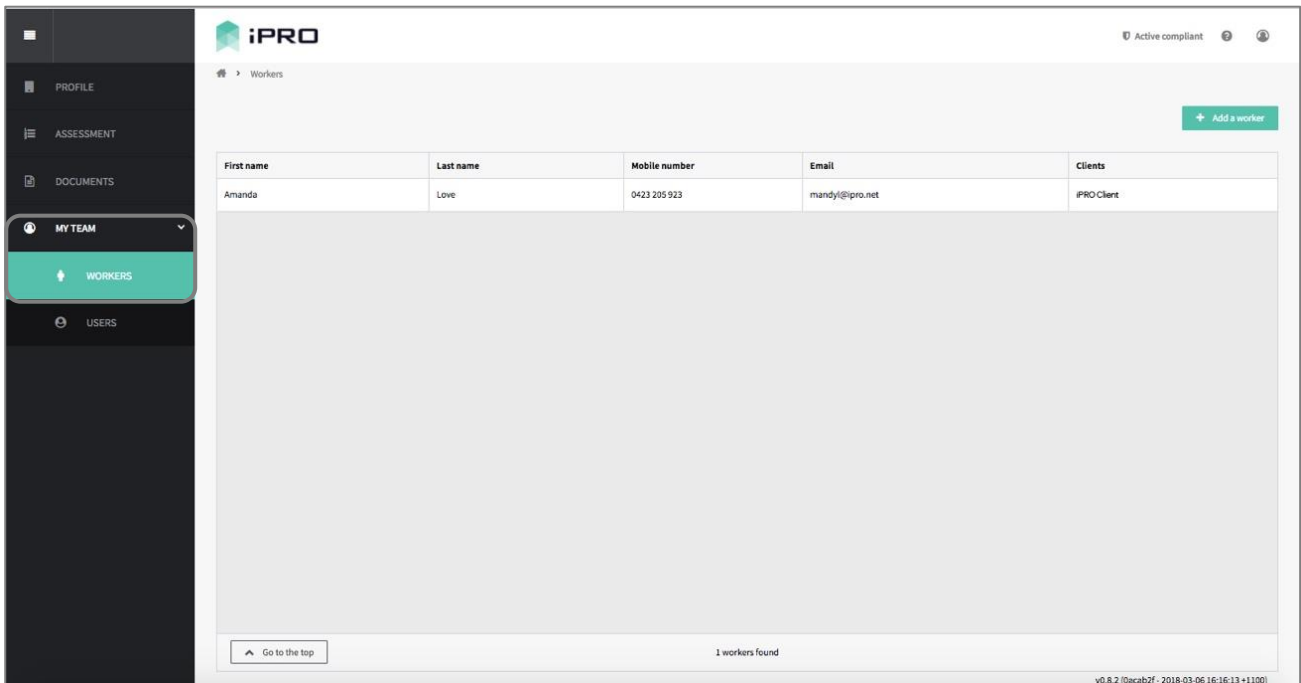
13. Repeat steps 5-12 to complete all your worker's credentials.

## 6. Invite a worker to the iPRO Access App

### Quick Tips

- Invite your workers to download the iPRO Access App. on their smartphone.
- iPRO Access App checks your organisation and worker's compliance status and grants or denies site access.
- The client location list view informs workers which sites require iPRO Access check-in with a reference to 'Check-in required'

1. Click **'My Team'** from the left hand navigation menu.
2. Click **'Workers'** from the left hand navigation menu (refer below).

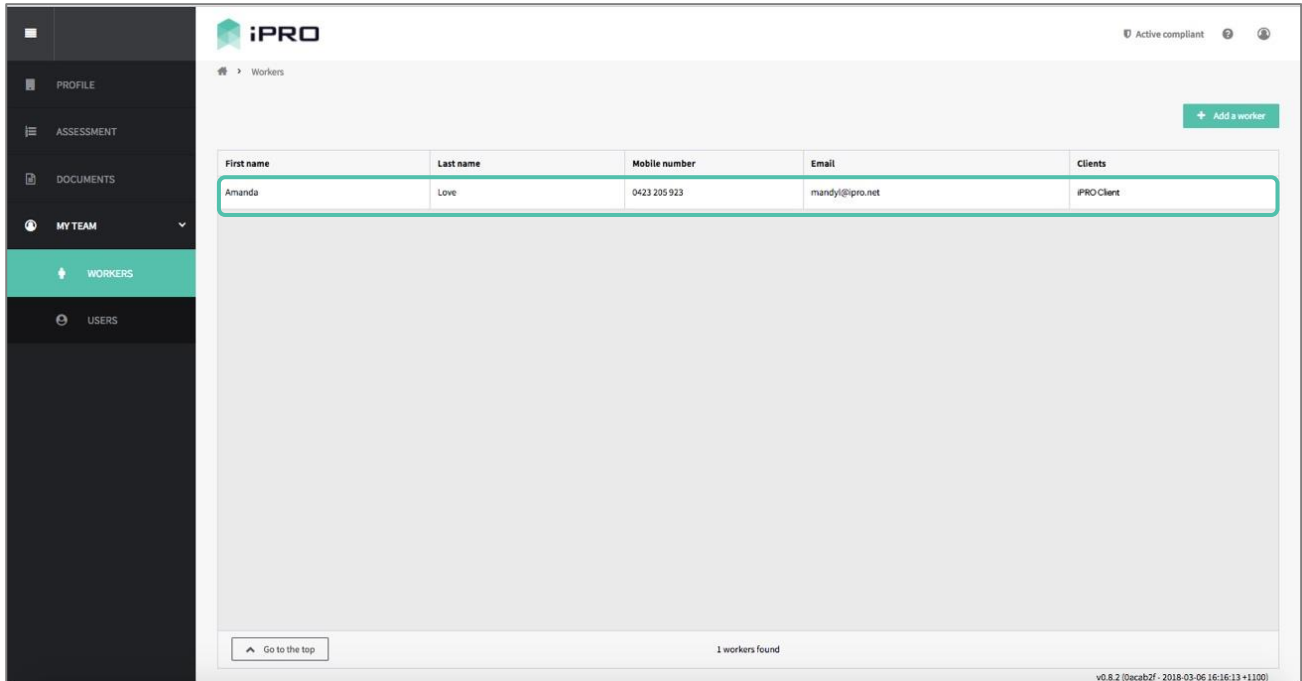


The screenshot displays the iPRO web application interface. On the left, a dark sidebar contains a navigation menu with options: PROFILE, ASSESSMENT, DOCUMENTS, MY TEAM (expanded), WORKERS (highlighted), and USERS. The main content area is titled 'Workers' and features a table with the following data:

First name	Last name	Mobile number	Email	Clients
Amanda	Love	0423 205 923	mandy@ipro.net	iPRO Client

Below the table is a large, empty light gray rectangular area. At the bottom of the main content area, there is a 'Go to the top' button and the text '1 workers found'. The footer of the page includes the version information: 'v0.8.2 (Decab2f - 2018-03-06 16:16:13 +1100)'.

3. Click the worker you would like to invite to download the iPRO Access App (refer below).

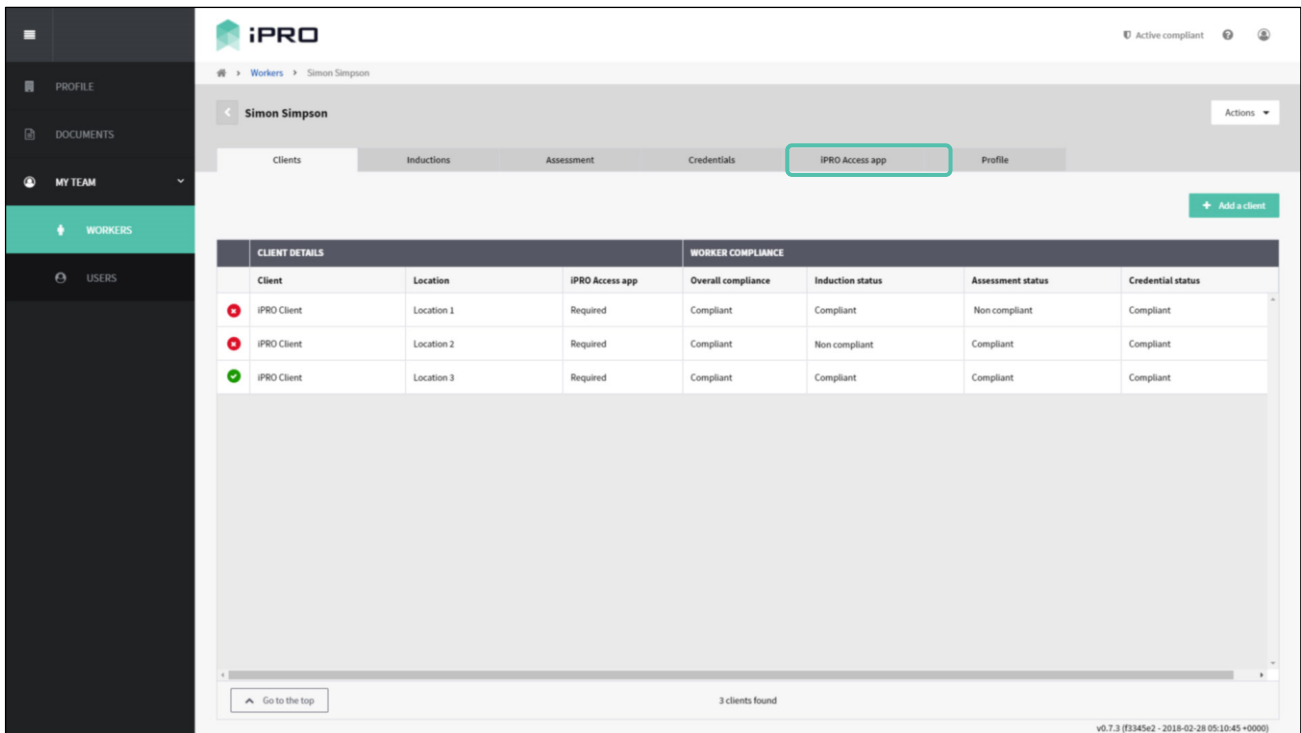


The screenshot shows the iPRO Workers page. The sidebar on the left has the 'WORKERS' tab selected. The main content area shows a table with the following data:

First name	Last name	Mobile number	Email	Clients
Amanda	Love	0423 205 923	mandy@ipro.net	iPRO Client

At the bottom of the table, it says '1 workers found'. There is a 'Go to the top' button and a version number 'v0.8.2 (Decab2f - 2018-03-06 16:16:13 +1100)' at the bottom right.

4. Click 'iPRO Access app' tab (refer below).

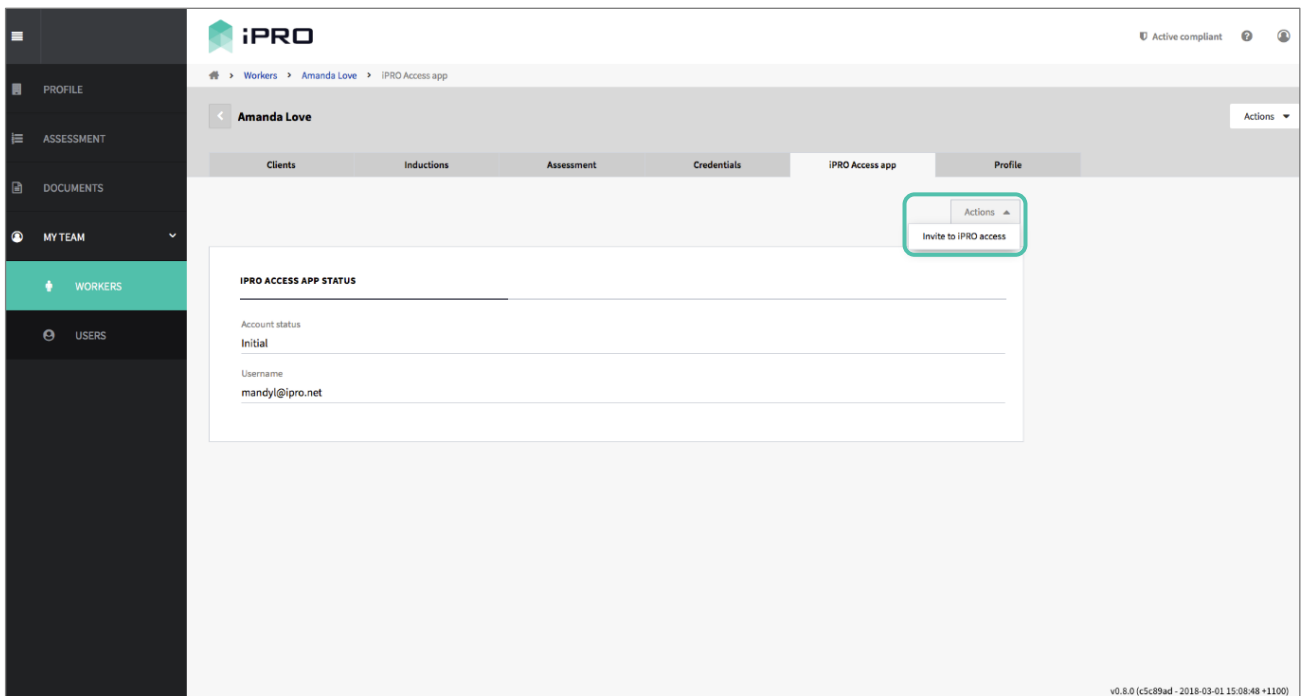


The screenshot shows the iPRO Simon Simpson page. The 'iPRO Access app' tab is selected. The table below shows the compliance status for three clients:

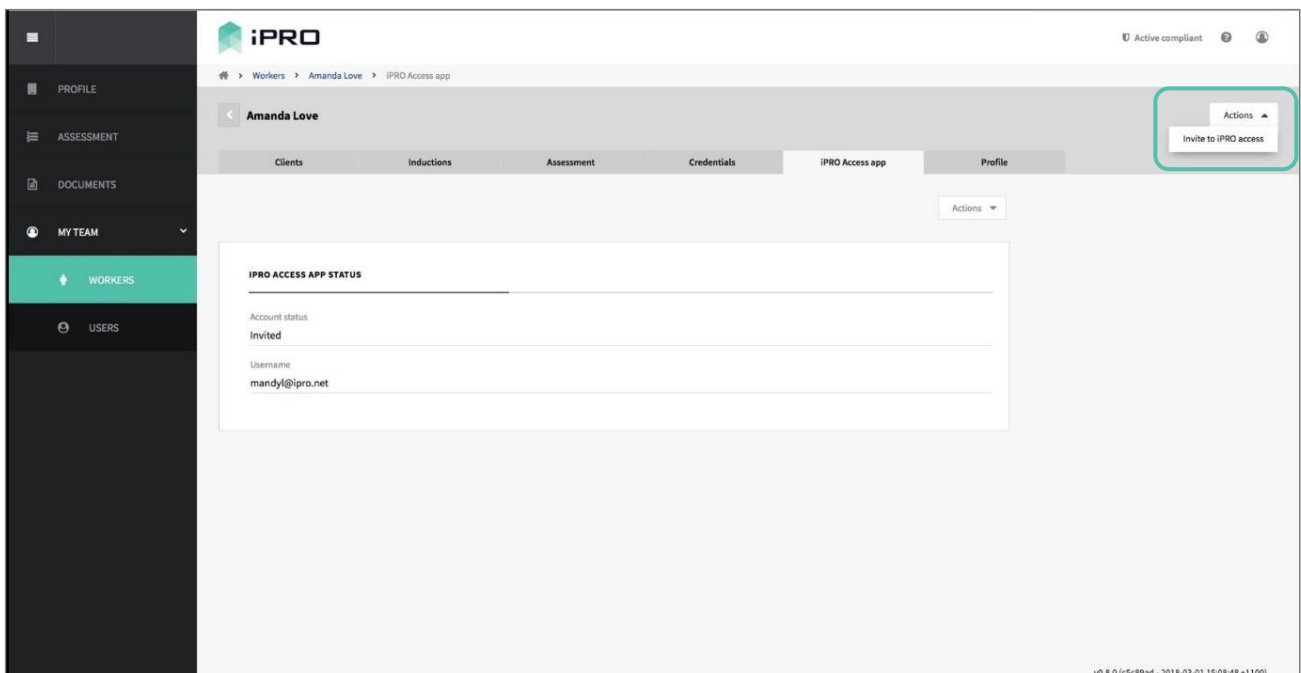
CLIENT DETAILS			WORKER COMPLIANCE			
Client	Location	iPRO Access app	Overall compliance	Induction status	Assessment status	Credential status
iPRO Client	Location 1	Required	Compliant	Compliant	Non compliant	Compliant
iPRO Client	Location 2	Required	Compliant	Non compliant	Compliant	Compliant
iPRO Client	Location 3	Required	Compliant	Compliant	Compliant	Compliant

At the bottom of the table, it says '3 clients found'. There is a 'Go to the top' button and a version number 'v0.7.3 (f3345e2 - 2018-02-28 05:10:45 +0000)' at the bottom right.

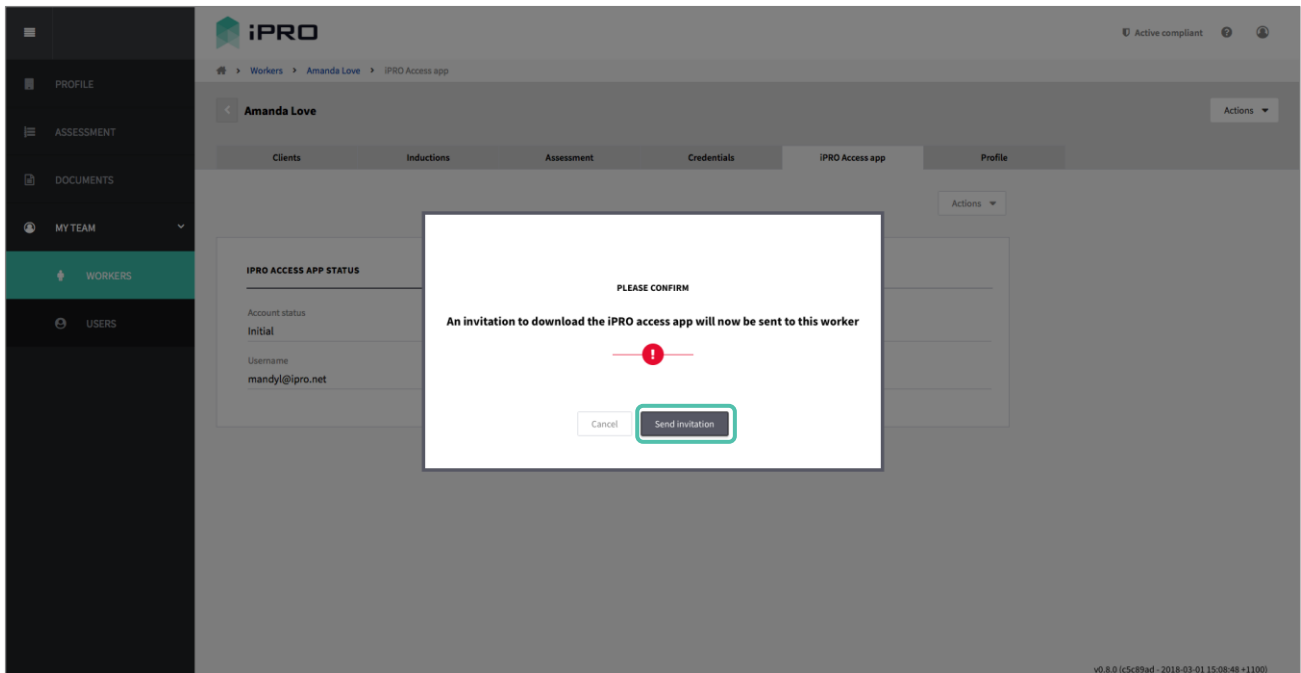
5. Navigate to Actions and click **'Invite to iPRO Access'** (refer below) or;



6. Navigate to Actions in the top right hand side and click **'Invite to iPRO Access'** (refer below).



7. The following screen will display (refer below).
8. Click **'Send invitation'** (refer below).



9. The worker will receive an email notification to register and download the iPRO Access App.