How to set up a Contractor
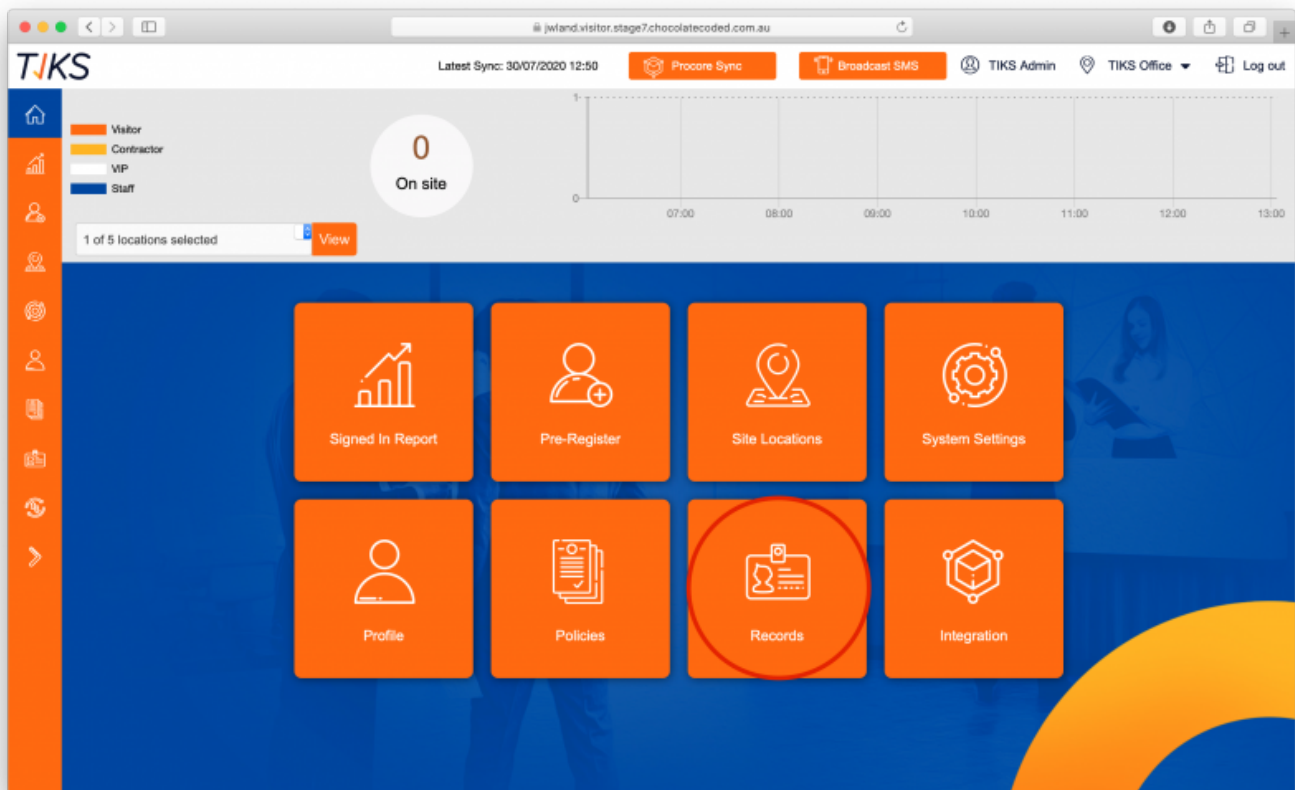
- How to onboard a new Contractor Company
- How to Set-up Records for Contractors
- How to Set-up Records for Individual Workers
- How to Approve or Reject Records

How to onboard a new Contractor Company

Inviting a new Contracting Company

The instructions below are to manually invite a contracting company to onboard. When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS Records. However, you will have to manually invite an Administrator for each of the synced companies from Procore.

1. Log into the admin portal: https://jwland.visitor.tiks.com.au/dashboard
2. Tap on the "Records" button

Next, to invite a **Contracting Company** you will need to fill in the following fields:

Step 1: Add the Company name

Step 2: Add the Company Admin user's Full Name

Step 3:Add their admin user's email address

Step 4: Add their admin user's mobile number

Step 5: Select which active sites this Company can work on.

Now tap on the "Invite Company" to finalise the registration. The Admin user for this account will now be notified by email.

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Latest Sync: 30/07/2020 12:50   Procore Sync   Broadcast SMS   TIKS Admin   TIKS Office ▾   Log out

Companies List

Download Report   Filter Results   🔍

Show entries
10

| 📑 Test Company ① | 🔐 Sam Marciano ② | ✉ sam+test@tiks.com.au ③ | 📞 🇦🇺 +61 ▾ 0421969482 ④ |

| 📍 1 of 3 locations selected ▾ | Record Type Settings   Invite Company |

☐ [Select all]
☐ Milagre Site
☑ TIKS Office   ⑤
☐ TIKS Test Site

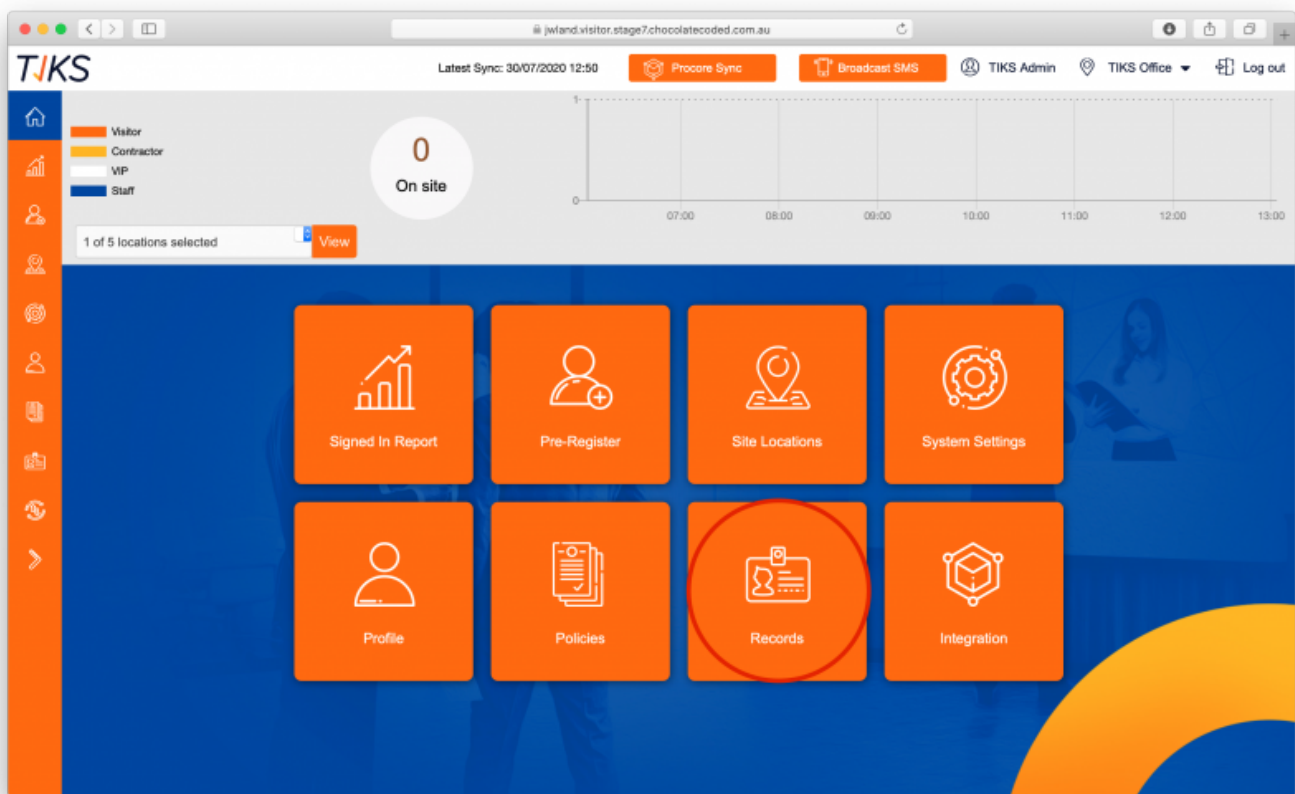| Compa...	Company Admin	Email	Company Status ⇕	Site Locations ⇕	Actions
🔗 Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals ① View Records ✏ 🗑
🔗 Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ✏ 🗑
🔗 Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ✏ 🗑

How to Set-up Records for Contractors

How to Set-up Records for your Contracting Companies

1. Log into the admin portal: https://jwland.visitor.tiks.com.au/dashboard

2. Tap on the "Records" button

Step 1: Tap on the "Records Type Settings"

Step 2: Tap on the "Add Records Type"

Record Type		Category	Mandatory?	Document Upload?	Expiry Required?	Number/ID Required?	Country Required?	State Required?	Approval Required?	Worker Sign Off Required?	Site Locations Selected?	Actions
#Company - Active		Company	☑								N/A	✎ 🗑
#Company - Approval		Company	☑						☑		N/A	✎ 🗑
#Company - Country		Company	☑				☑				N/A	✎ 🗑
#Company - Expiry		Company	☑		☑						N/A	✎ 🗑
#Company - Record Number		Company	☑			☑					N/A	✎ 🗑
#Company - State		Company	☑					☑			N/A	✎ 🗑
#Company - Upload Doc		Company	☑	☑							N/A	✎ 🗑
#Company - Work Sign Off		Company	☑							☑	N/A	✎ 🗑
#Individual - Active		Individual	☑							N/A	TIKS Office	✎ 🗑
#Individual - Approval		Individual	☑						☑	N/A	TIKS Office	✎ 🗑

Step 3: Give this record a Name/title ie: "Safe Work Method Statements"

Step 4: To make this record available to the Contractor Company, please select **"Company"** in the **Category dropdown list** and select the options which are relevant for this record. **Once done, please tap on the "Save" button**.

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

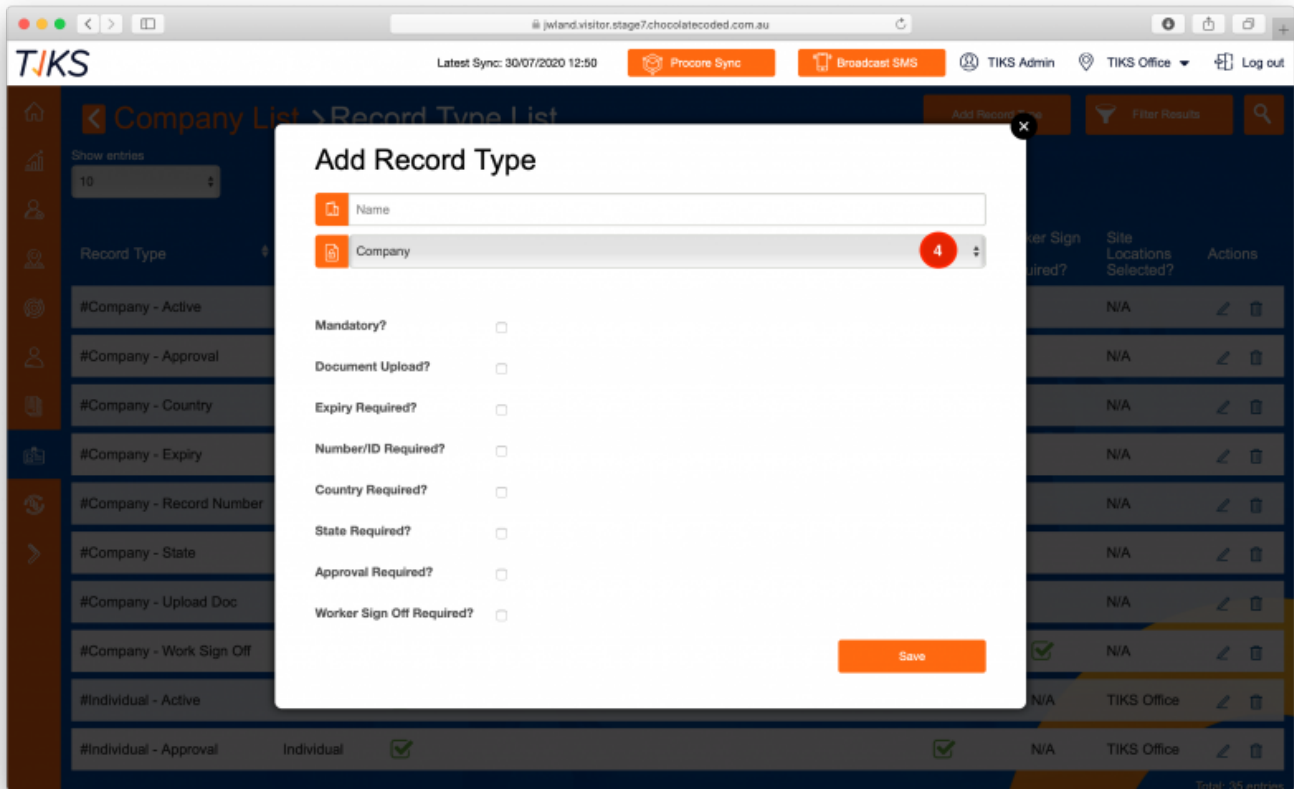**Expire Required:** Select this if you want to capture the expiry date of this record

Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked
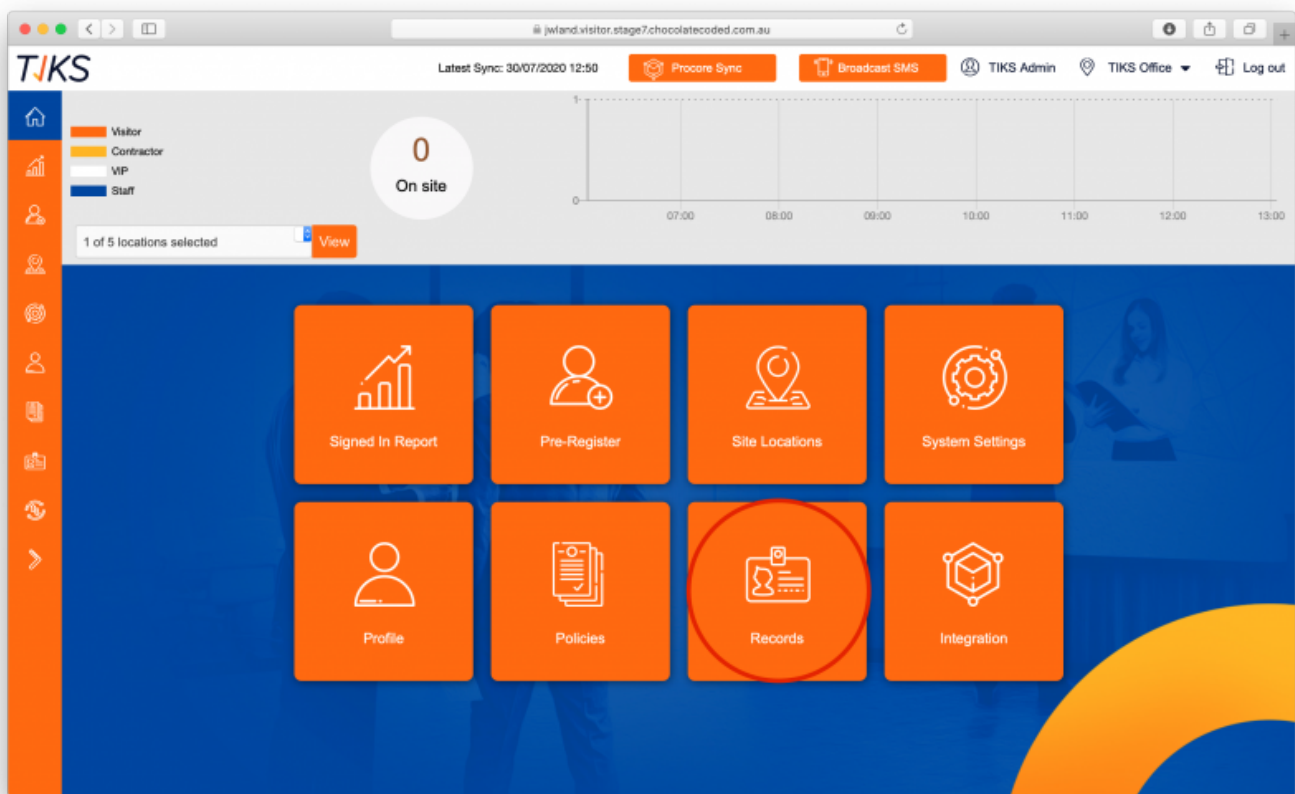
Worker Sign Off Required: Select this option if you would like the Contractor Worker to acknowledge that they have viewed the information the Company has submitted against this record

Company List > Record Type List   Add Records   Filter Results

Show entries
10

Record Type

Add Record Type ✕

Name

Company   4 ⬍

Mandatory?   ☐

Document Upload?   ☐

Expiry Required?   ☐

Number/ID Required?   ☐

Country Required?   ☐

State Required?   ☐

Approval Required?   ☐

Worker Sign Off Required?   ☐

                                        Save

#Company - Active   N/A   ✎ 🗑

#Company - Approval   N/A   ✎ 🗑

#Company - Country   N/A   ✎ 🗑

#Company - Expiry   N/A   ✎ 🗑

#Company - Record Number   N/A   ✎ 🗑

#Company - State   N/A   ✎ 🗑

#Company - Upload Doc   N/A   ✎ 🗑

#Company - Work Sign Off   ☑   N/A   ✎ 🗑

#Individual - Active   N/A   TIKS Office ✎ 🗑

#Individual - Approval   Individual   ☑   ☑   N/A   TIKS Office ✎ 🗑

How to Set-up Records for Individual Workers

How to Set-up Records for Individual Workers

1. Log into the admin portal: https://jwland.visitor.tiks.com.au/dashboard
2. Tap on the "Records" button

Step 1: Tap on the "Records Type Settings"

Step 2: Tap on the "Add Records Type"

Record Type		Category	Mandatory?	Document Upload?	Expiry Required?	Number/ID Required?	Country Required?	State Required?	Approval Required?	Worker Sign Off Required?	Site Locations Selected?	Actions
#Company - Active		Company	☑								N/A	✎ 🗑
#Company - Approval		Company	☑						☑		N/A	✎ 🗑
#Company - Country		Company	☑				☑				N/A	✎ 🗑
#Company - Expiry		Company	☑		☑						N/A	✎ 🗑
#Company - Record Number		Company	☑			☑					N/A	✎ 🗑
#Company - State		Company	☑					☑			N/A	✎ 🗑
#Company - Upload Doc		Company	☑	☑							N/A	✎ 🗑
#Company - Work Sign Off		Company	☑							☑	N/A	✎ 🗑
#Individual - Active		Individual	☑							N/A	TIKS Office	✎ 🗑
#Individual - Approval		Individual	☑						☑	N/A	TIKS Office	✎ 🗑

Step 3: Give this record a Name/title ie: "Safe Work Method Statements"

Step 4: To make this record available to the Contractor Company, please select **"Individual"** in the **Category dropdown list** and select the options which are relevant for this record.

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

Expire Required: Select this if you want to capture the expiry date of this record

Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked
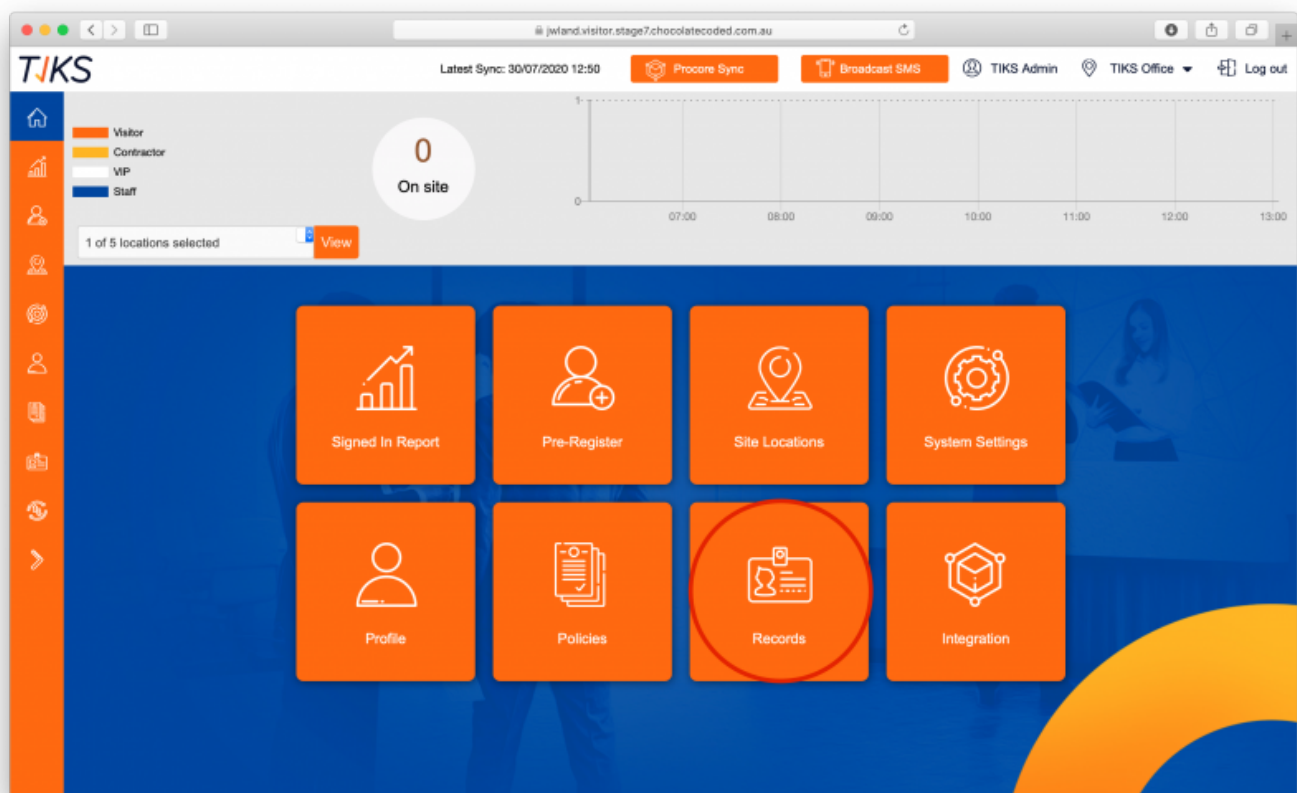
Step 5: Select which site this worker can work on in the check-box options available: **Once done, please tap on the "Save" button**.
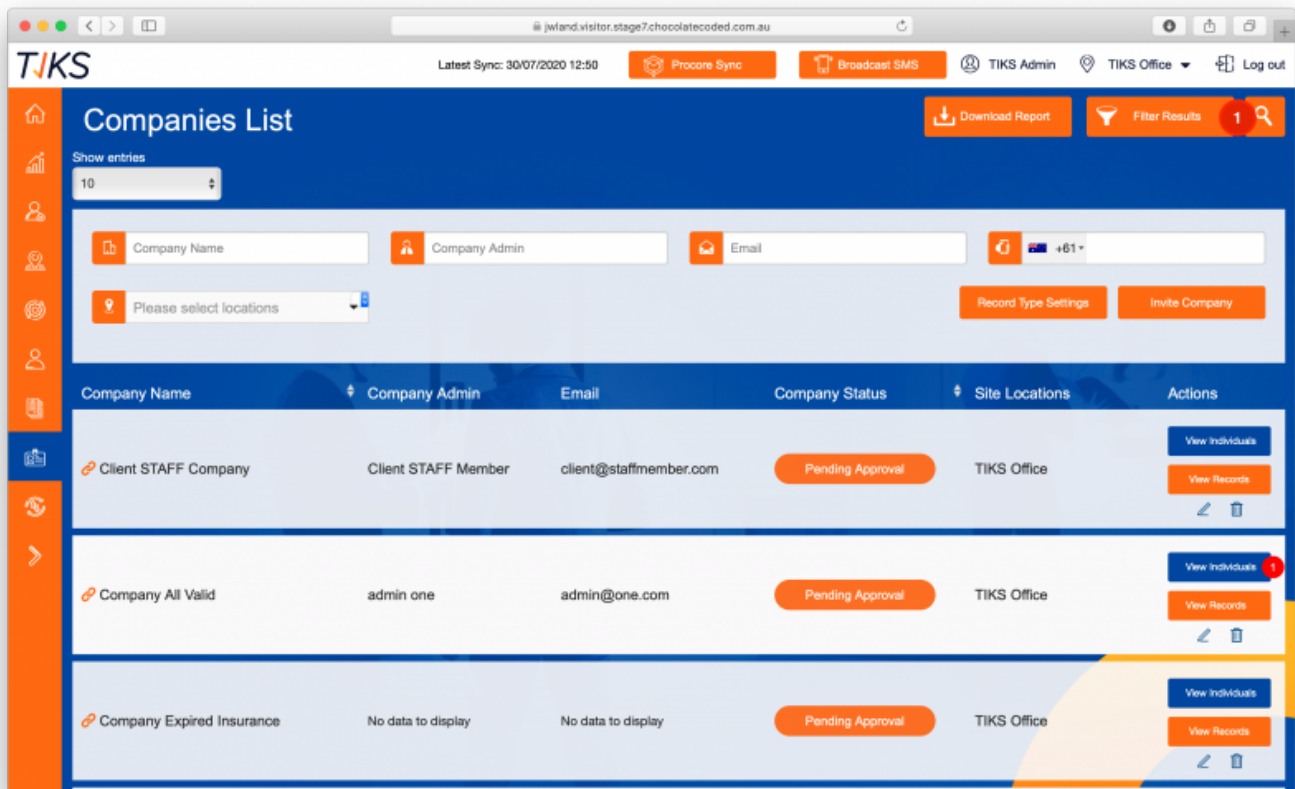
TIKS

Company List > Record Type List

Filter Results

Show entries
10

Record Type				ker Sign uired?	Site Locations Selected?	Actions

Add Record Type

Name

Individual ④

Please select locations

- [Select all]
- Milagre Site ⑤
- TIKS Office
- TIKS Test Site

Mand

Document Upload? ☐

Expiry Required? ☐

Number/ID Required? ☐

Country Required? ☐

State Required? ☐

Approval Required? ☐

Save

#Company - Active					N/A	✎ 🗑
#Company - Approval					N/A	✎ 🗑
#Company - Country					N/A	✎ 🗑
#Company - Expiry					N/A	✎ 🗑
#Company - Record Number					N/A	✎ 🗑
#Company - State					N/A	✎ 🗑
#Company - Upload Doc					N/A	✎ 🗑
#Company - Work Sign Off				✓	N/A	✎ 🗑
#Individual - Active	Individual				N/A	TIKS Office	✎ 🗑
#Individual - Approval	Individual	✓		✓	N/A	TIKS Office	✎ 🗑

Total: 36 entries

How to Approve or Reject Records

Review Records

1. Log into the admin portal: https://jwland.visitor.tiks.com.au/dashboard
2. Tap on the "Records" button

Step 1: Tap on the search icon and type in the Company you wish to review. Alternatively, you can scroll down the page until you find that Company.

Step 2: To view the records for this Company, tap on the "View Records" agains the company listing

Step 3: You will now see a list of records submitted by this company, to view documents that may have been uploaded, tap on the download document icon

Step 4: To approve this record, tap on the "Approve" button. This will also allow you to add any comments you wish the Contractor Company Admin to see. Once approved, this record tile will go green.

To *Reject* this record, simply tap on the "Reject" button and add notes to help your Contractor understand what is needed for this record.

TIKS

< Milagre Construction... > Records List

Show entries
10

	Record Type	Record Number	Locations	Record Expiry	Record Status	Actioned By	Actions
	Milagre Company and Worker Ack... Australia NSW	SWMS		**24/07/2020**	Expired Since: 23/07/2020 23:30	TIKS Admin	**4** Approve / Reject
	###NEW SWMS				Pending Approval		Approve / Reject
	Mandatory Compnay Record				Pending Approval		Approve / Reject
	Please upload your Public Liab...				Pending Approval		Approve / Reject