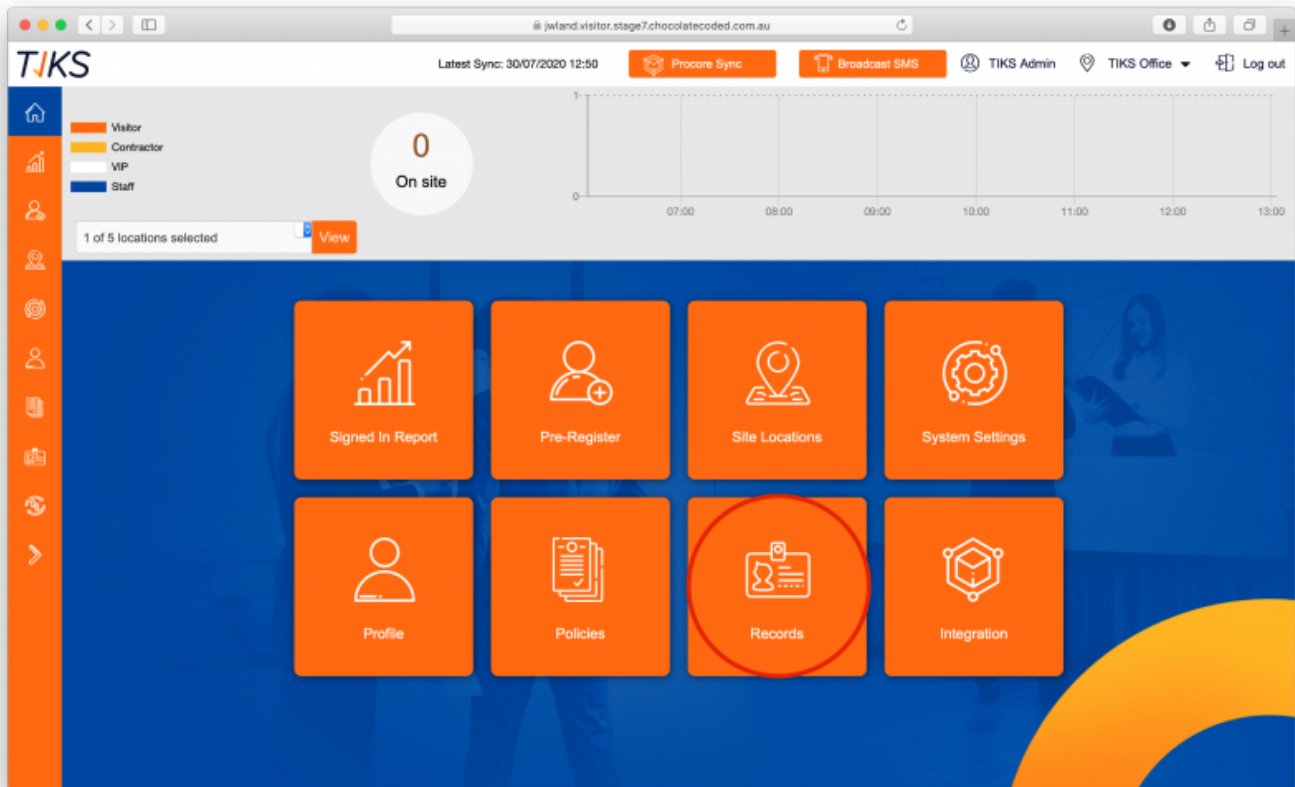


# How to Set-up Records for Contractors

## 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"

The screenshot displays the 'Companies List' interface in the TIKS application. At the top, there's a navigation bar with the TIKS logo, a sync status ('Latest Sync: 30/07/2020 12:50'), and buttons for 'Procure Sync', 'Broadcast SMS', 'TIKS Admin', 'TIKS Office', and 'Log out'. Below this is a search bar and buttons for 'Download Report' and 'Filter Results'. The main content area features a 'Show entries' dropdown set to '10'. A search bar contains 'Test Company', and a dropdown menu is open over the 'Site Locations' column, showing options: '[Select all]', 'Milagre Site', 'TIKS Office' (checked), and 'TIKS Test Site'. The table below has columns: 'Company', 'Company Admin', 'Email', 'Company Status', 'Site Locations', and 'Actions'. The first row shows 'Client STAFF Company' with status 'Pending Approval' and location 'TIKS Office'. The other two rows show 'Company Expired Insurance' and 'Company No Insurance', both with 'No data to display' for admin and email, and 'Pending Approval' status.

Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals 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

Step 2: Tap on the "Add Records Type"

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

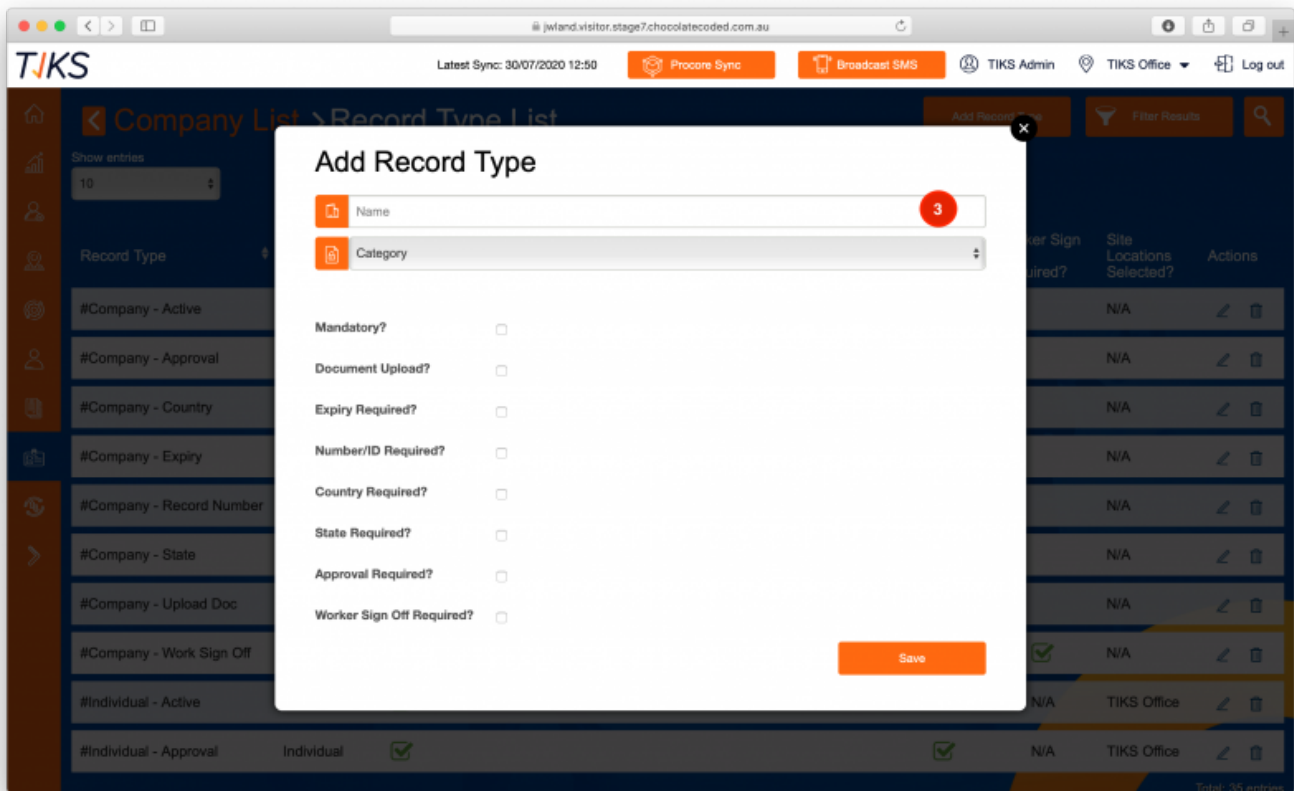
Company List > Record Type List

Show entries: 10

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	✎ 🗑

Total: 35 entries

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

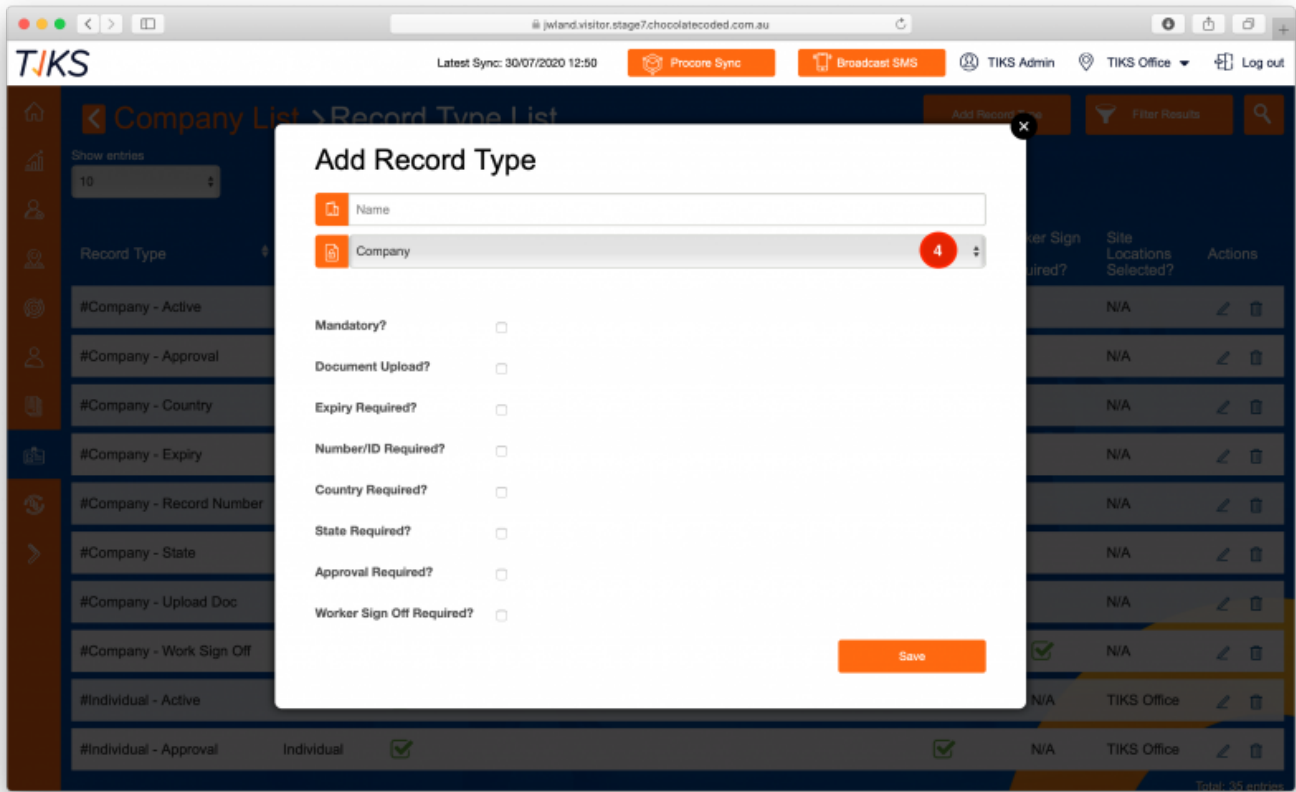
**Number/ID Required:** Select this if you require to capture the record number, an example may be the Policy Number or Licence number

**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



Revision #7

Created 5 years ago by [Sam Marciano](#)

Updated 5 years ago by [Robert Milagre](#)