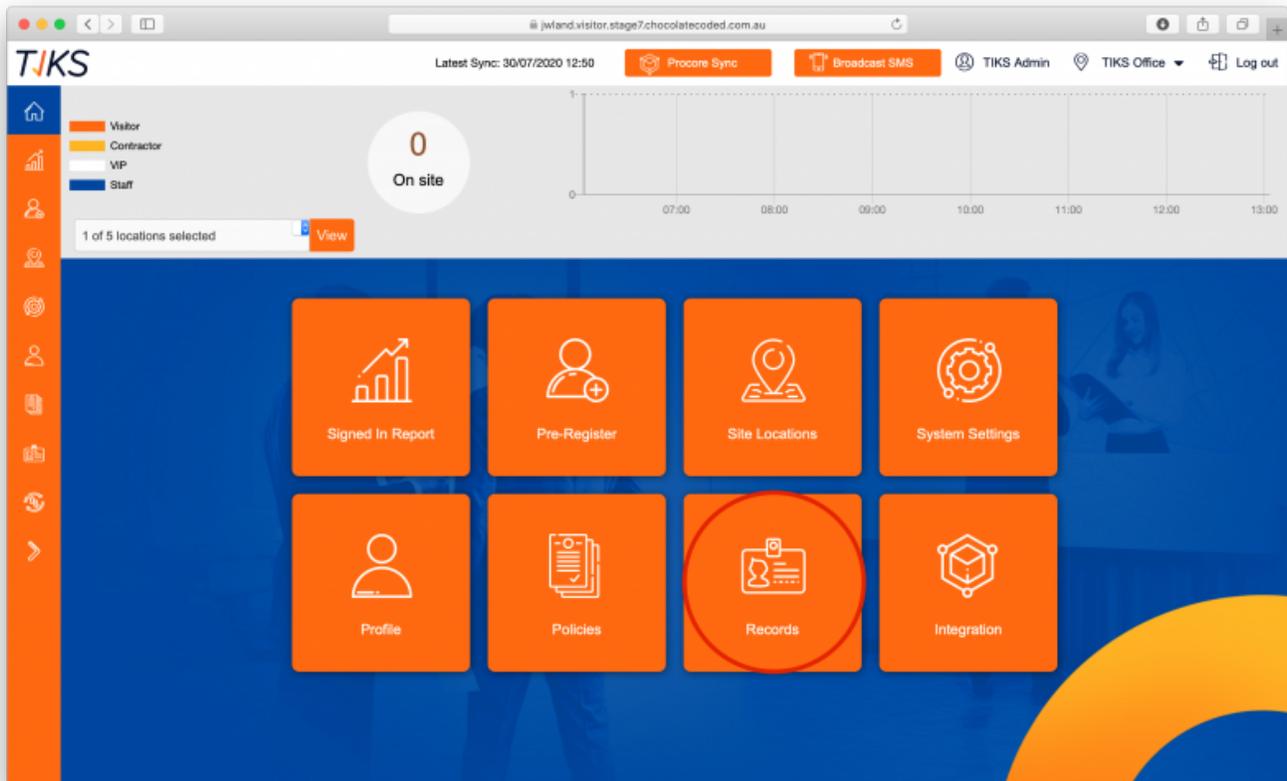


How to Set-up Records for Contractors

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 shows a web browser window displaying the TIKS 'Companies List' page. The browser address bar shows 'jwland.visitor.stage7.chocolatecoded.com.au'. The page header includes the TIKS logo, a 'Latest Sync: 30/07/2020 12:50' timestamp, and buttons for 'Procure Sync', 'Broadcast SMS', 'TIKS Admin', 'TIKS Office', and 'Log out'. The main content area is titled 'Companies List' and features a search bar, a 'Download Report' button, and a 'Filter Results' button. A 'Show entries' dropdown is set to '10'. Below this, there are input fields for 'Test Company', 'Sam Marciano', 'sam+test@tks.com.au', and '+61 0421969482'. A dropdown menu shows '1 of 3 locations selected' with options: '[Select all]', 'Milagre Site', 'TIKS Office' (checked), and 'TIKS Test Site'. To the right of the dropdown are buttons for 'Record Type Settings' and 'Invite Company'. The main table has columns: 'Company', 'Company Admin', 'Email', 'Company Status', 'Site Locations', and 'Actions'. The table contains three rows: 'Client STAFF Company' (Client STAFF Member, client@staffmember.com, Pending Approval, TIKS Office), 'Company Expired Insurance' (No data to display, No data to display, Pending Approval, TIKS Office), and 'Company No Insurance' (No data to display, No data to display, Pending Approval, TIKS Office). Each row has 'View Individuals' and 'View Records' buttons. A red notification bubble with the number '1' is visible in the top right corner of the table area.

Step 2: Tap on the "Add Records Type"

Latest Sync: 30/07/2020 12:50

Procure Sync Broadcast SMS TIKS Admin TIKS Office Log out

Company List > Record Type List

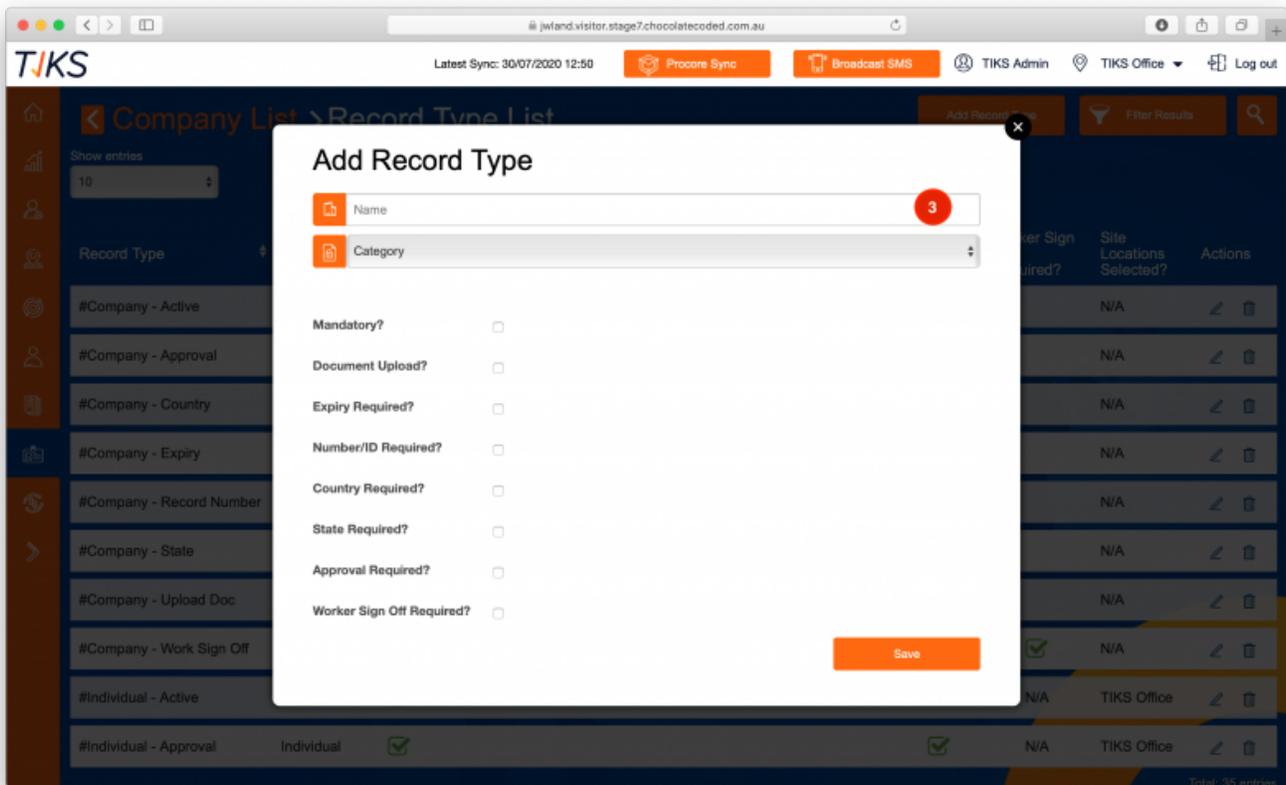
2 Add Record Type Filter Results

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

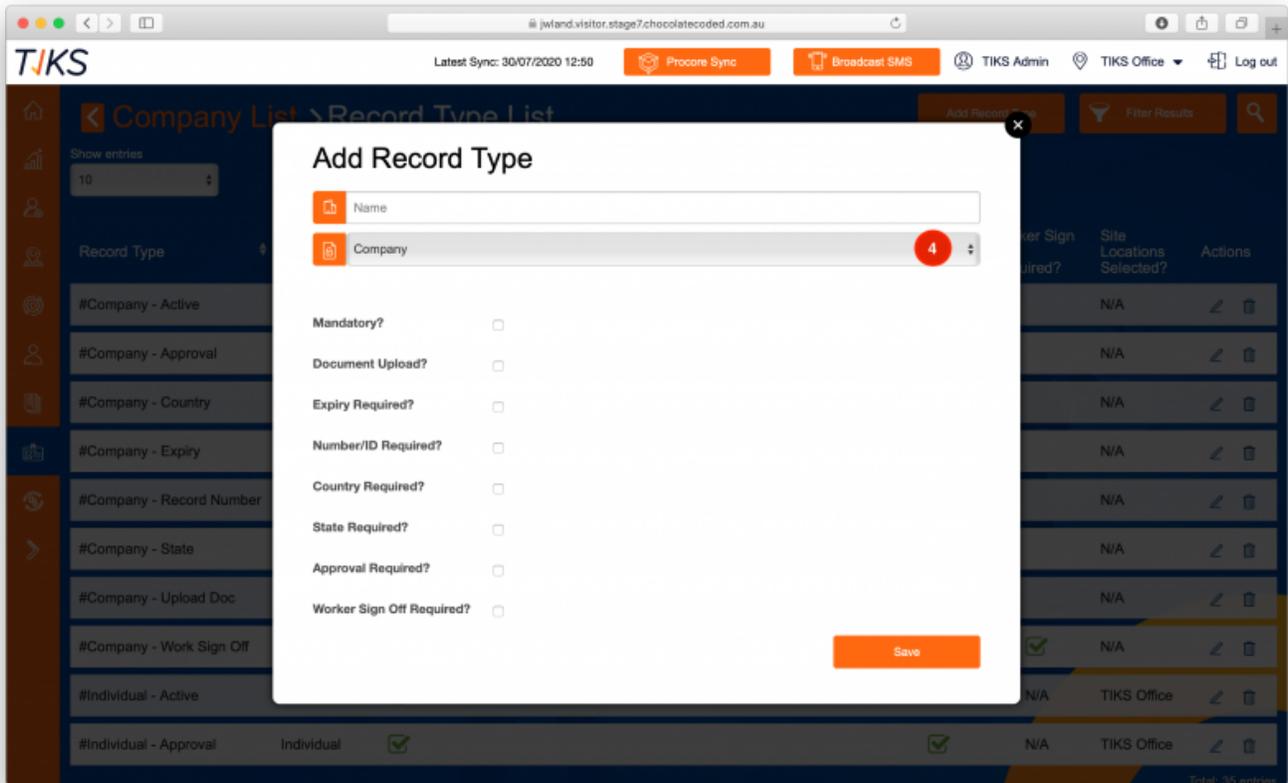
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

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 4 years ago by [Sam Marciano](#)

Updated 4 years ago by [Robert Milagre](#)