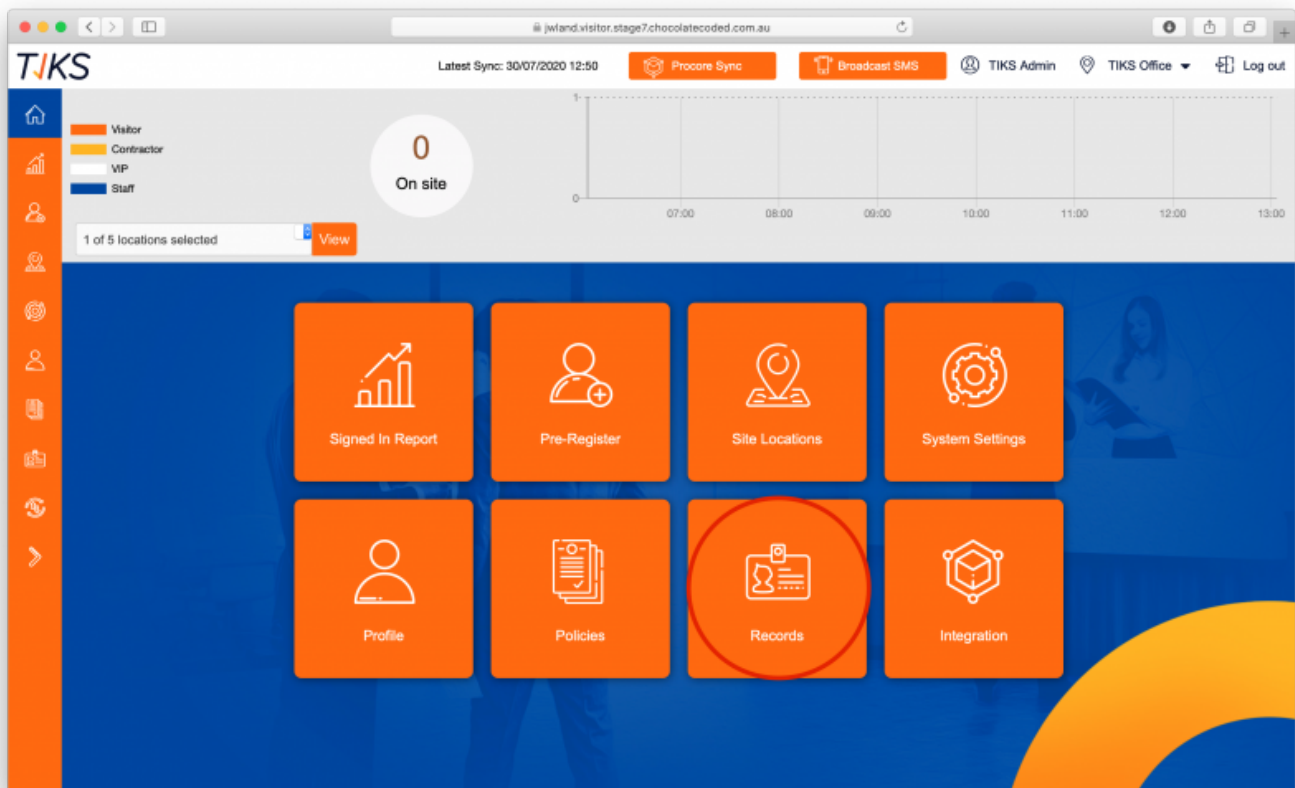


How to Set-up Records for Individual Workers

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"

The screenshot shows 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 the header, there are buttons for 'Download Report', 'Filter Results', and a search icon. A 'Show entries' dropdown is set to '10'. The main content area features a form for adding a company with fields for 'Test Company', 'Sam Marciano', 'sam+test@tks.com.au', and '+61 0421969482'. A dropdown menu is open for '1 of 3 locations selected', with options: '[Select all]', 'Milagre Site', 'TIKS Office' (checked), and 'TIKS Test Site'. Below the form is a table with the following columns: 'Company', 'Company Admin', 'Email', 'Company Status', 'Site Locations', and 'Actions'. The table contains three rows:

Company	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, Refresh, Delete
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals, View Records, Refresh, Delete
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals, View Records, Refresh, Delete

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

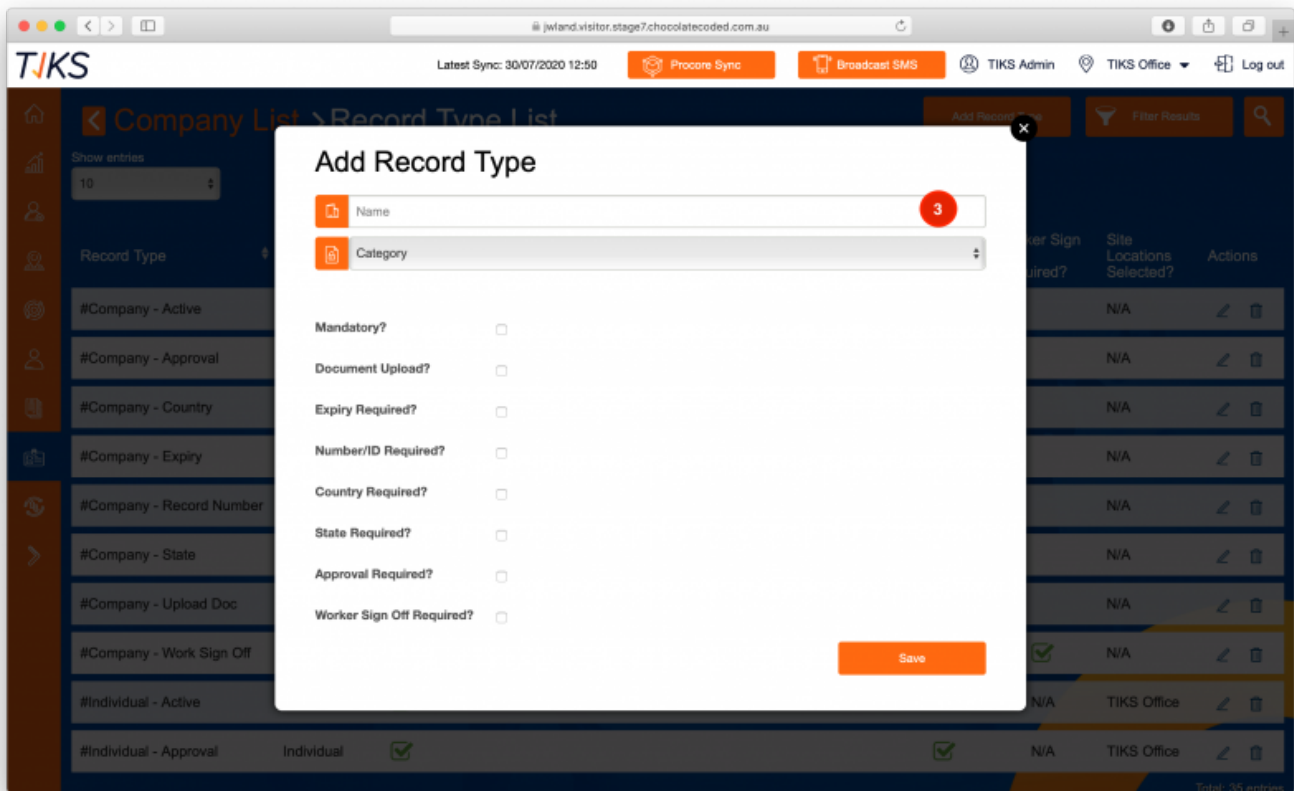
Company List > Record Type List 2 Add Record Type Filter Results Search

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

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 "**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

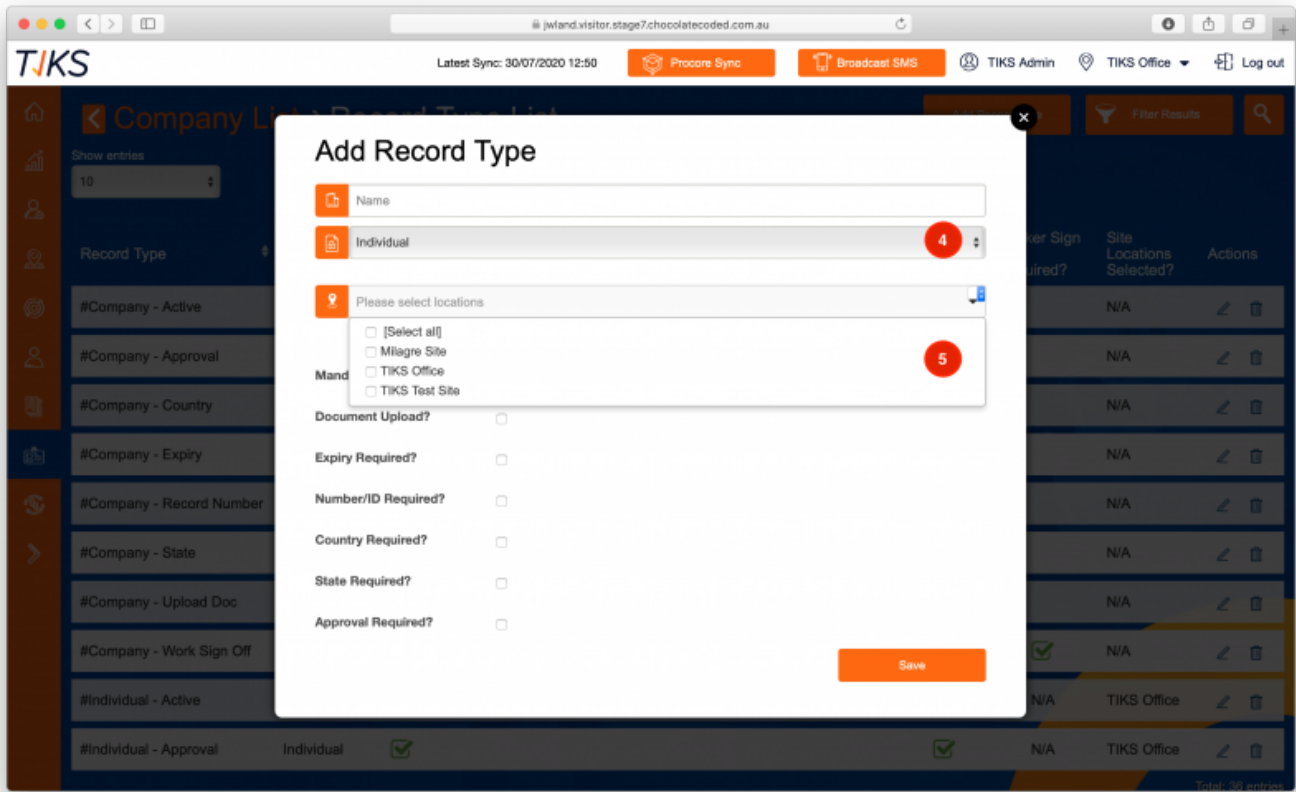
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

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.**



Revision #6

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

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