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
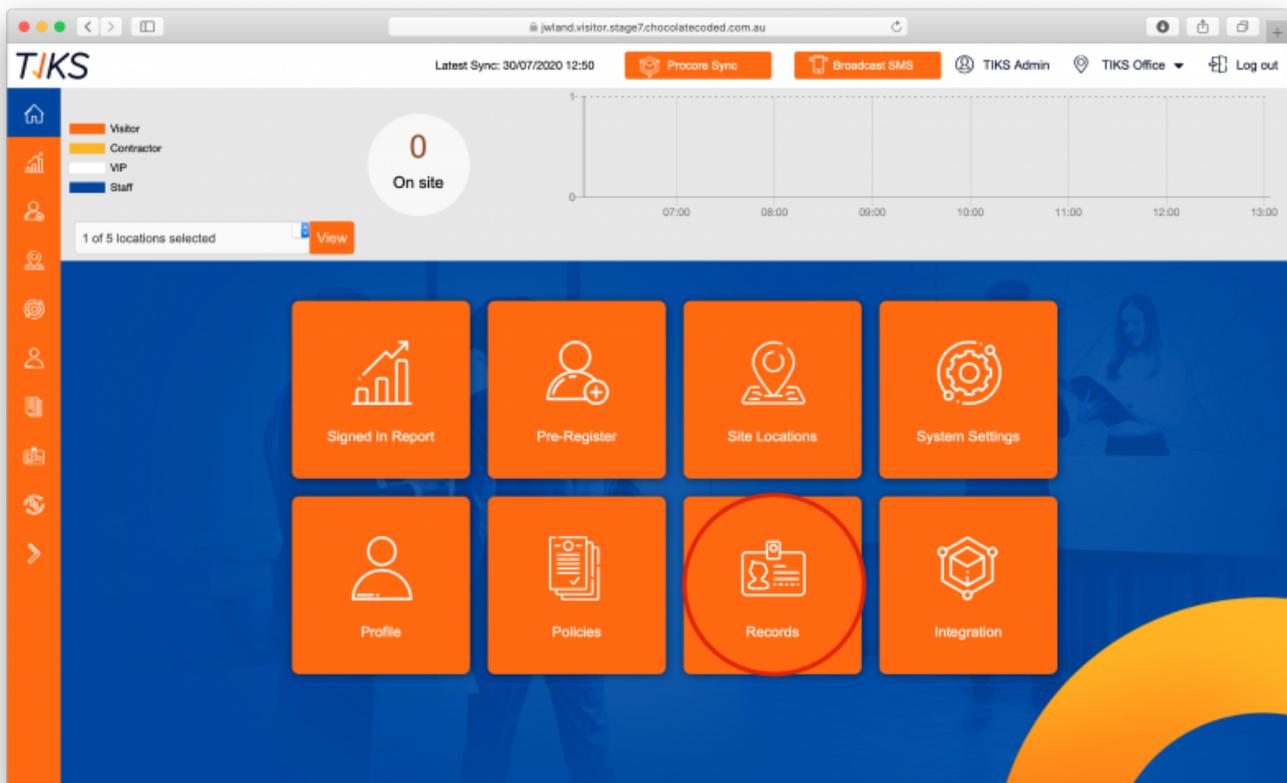
Step 1: Tap on the "Records Type Settings"

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	✎ 🗑

Total: 35 entries

Step 3: Give this record a Name/title ie: "Safe Work Method Statements"
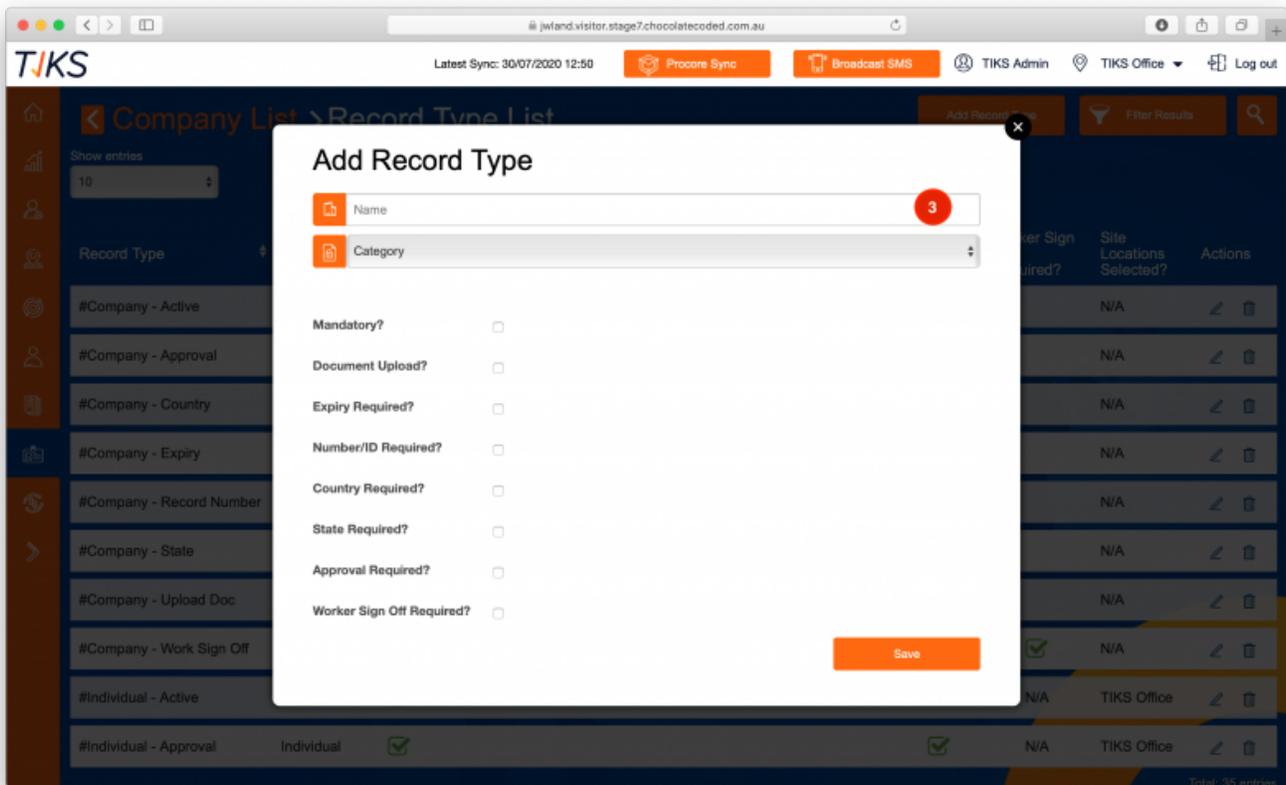
Step 4: To make this record available to the Contractor Company, please select **"Individual"** in the **Category dropdown list** and select the options which are relevant for this record.

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**.
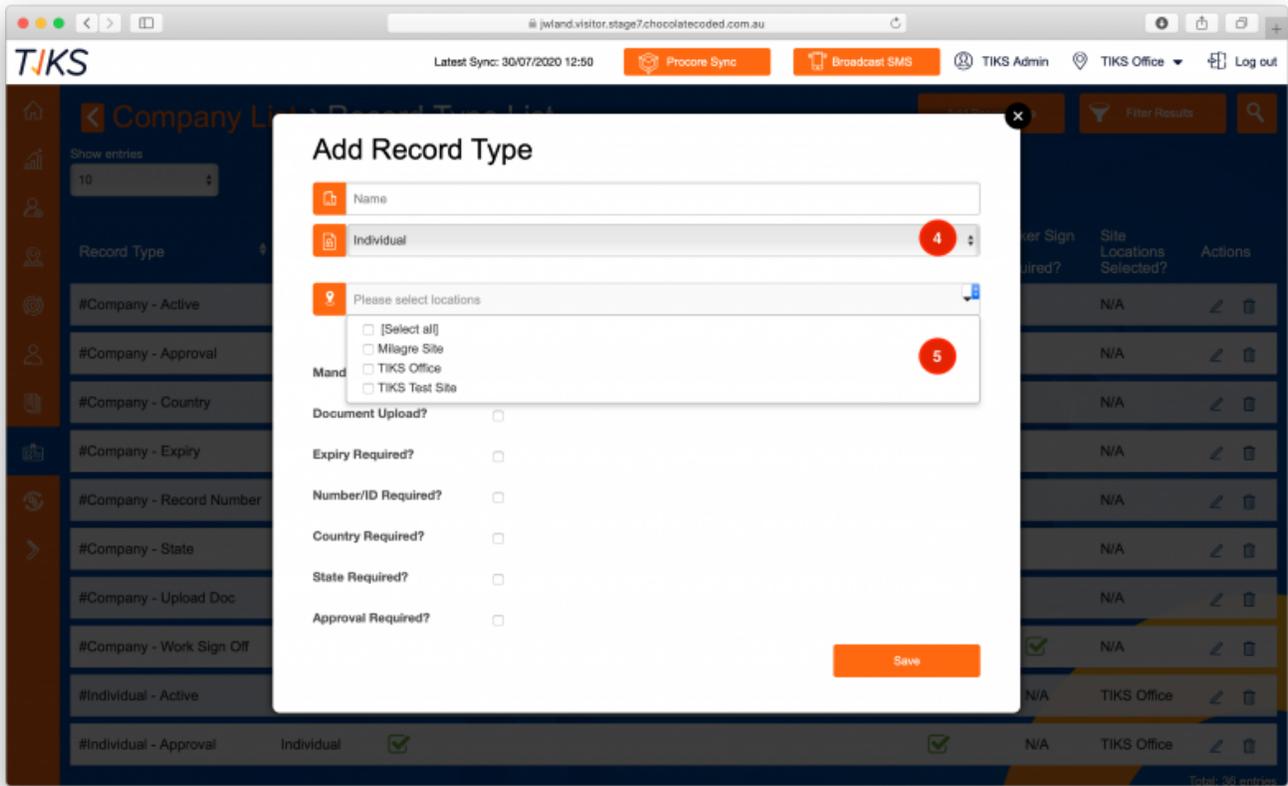
Revision #6

Created 4 years ago by Sam Marciano

Updated 4 years ago by Robert Milagre