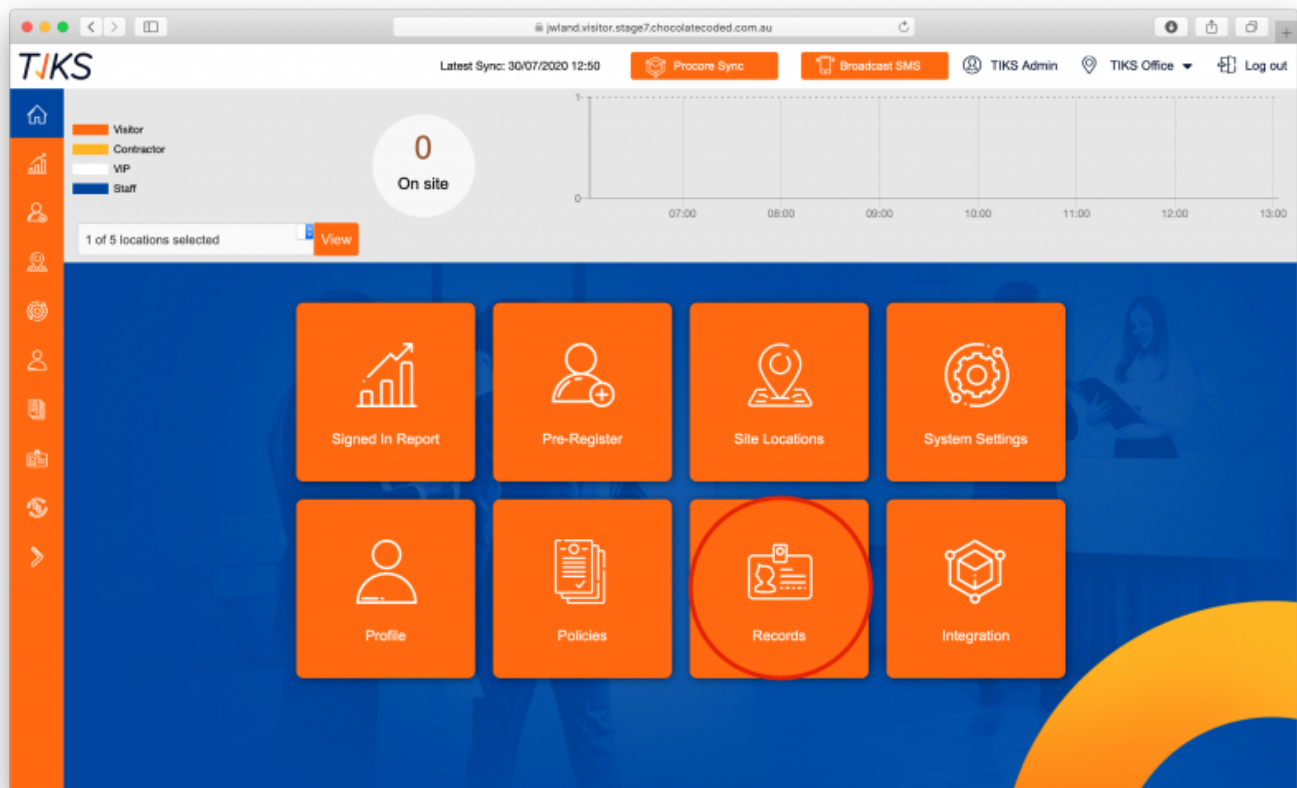


# How to Set-up Records for Individual Workers

## 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



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Step 1: Tap on the "Records Type Settings"

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

## Companies List

Show entries 10

Test Company Sam Marciano sam+test@tiks.com.au +61 0421969482

1 of 3 locations selected

- ☐ [Select all]
- ☐ Milagre Site
- ☒ TIKS Office
- ☐ TIKS Test Site

1 Record Type Settings Invite Company

Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	<a href="#">View Individuals</a> <span>1</span> <a href="#">View Records</a> <a href="#">Edit</a> <a href="#">Delete</a>
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<a href="#">View Individuals</a> <a href="#">View Records</a> <a href="#">Edit</a> <a href="#">Delete</a>
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<a href="#">View Individuals</a> <a href="#">View Records</a> <a href="#">Edit</a> <a href="#">Delete</a>

Step 2: Tap on the "Add Records Type"



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

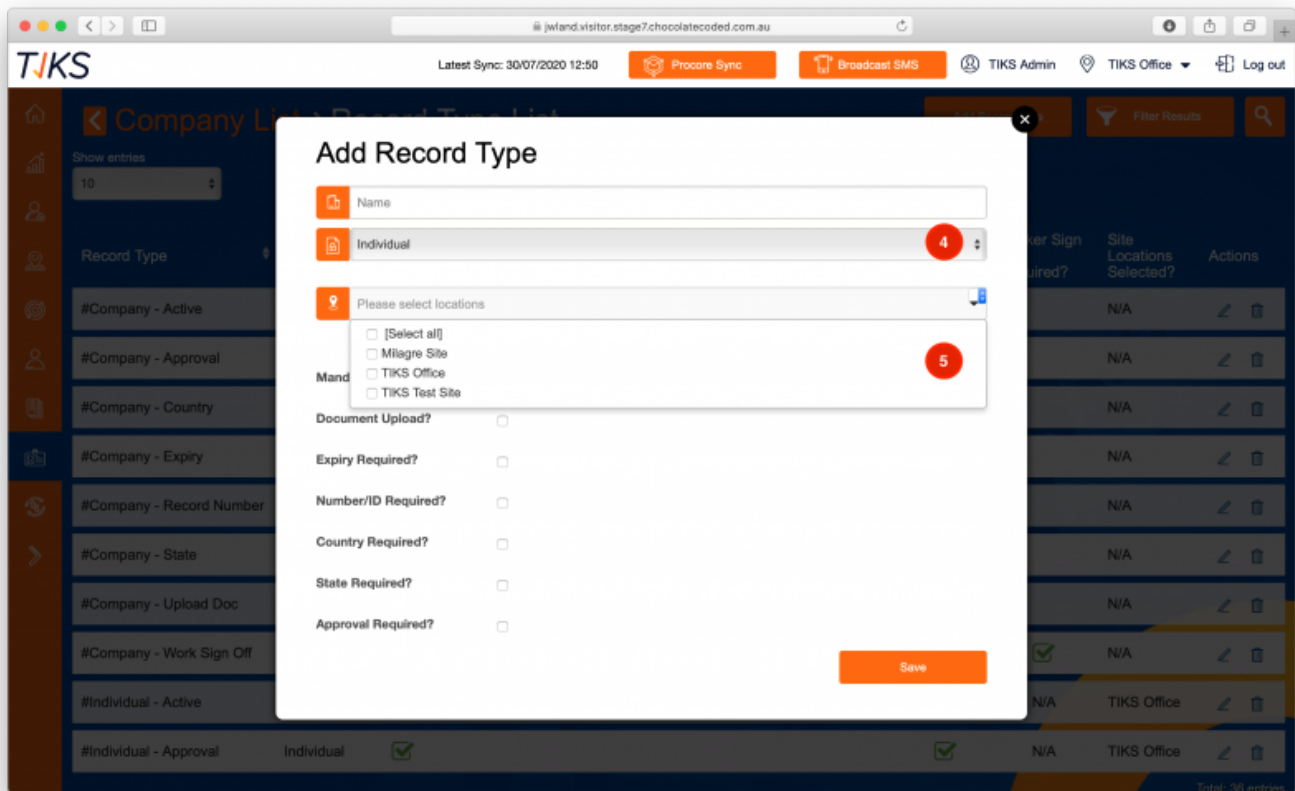
**Number/ID Required:** Select this if you require to capture the record number, an example may be the Policy Number or Licence number

**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](#)