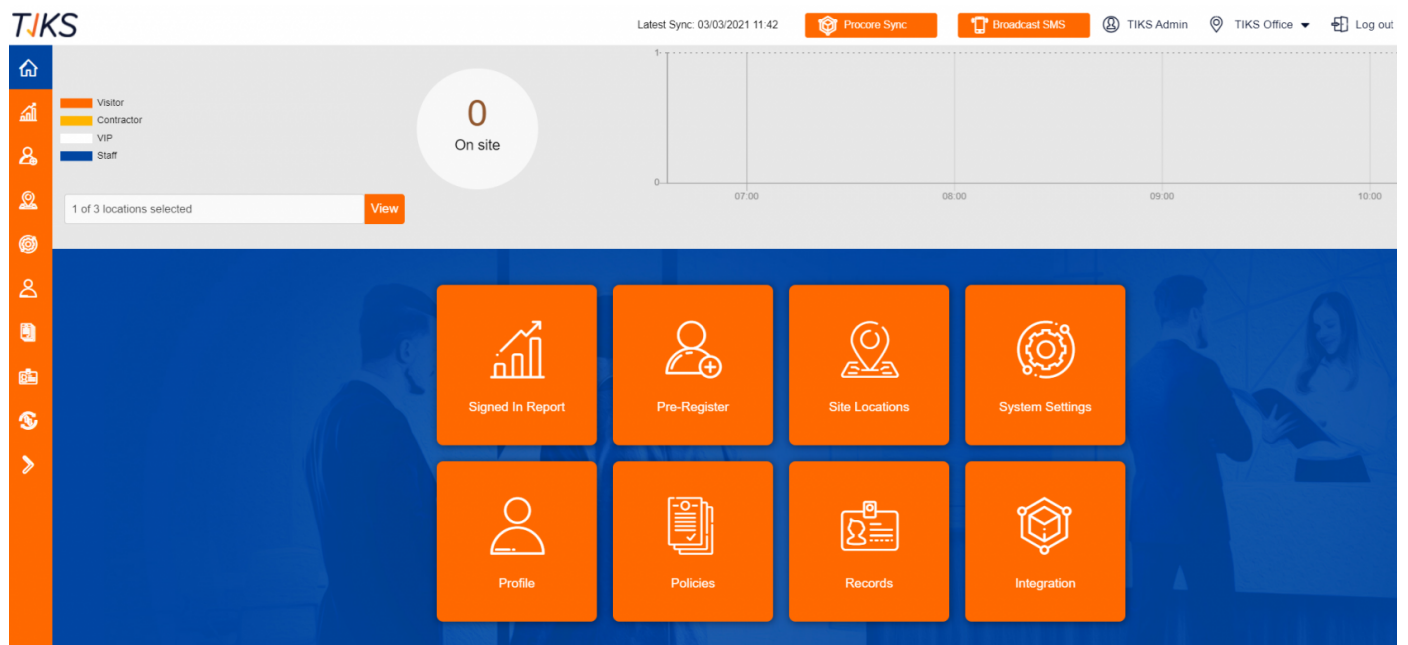
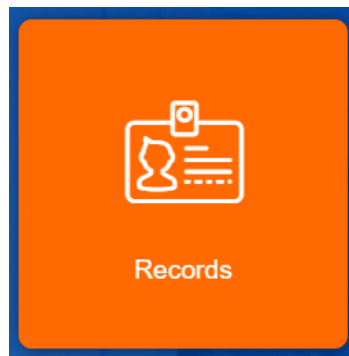


How do I set up Records for contracting companies?

Log into the admin portal.



Select the "Records" tile.



Step 1: Select "Records Type Settings" at the top of the page.

Companies List Download Report Filter Results Search

Show entries: 10

Company Name: Company Admin: Email: +61-

Please select locations Record Type Settings Invite Company

Step 2: Select "Add Record Type"

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

Show entries: 10

Record Type	Category	Active?	Document Upload?	Expiry Required?	Number/ID Required?	Country Required?	State Required?	Approval Required?	Worker Sign Off Required?	Site Locations Selected?	Actions
Asbestos Awareness	Individual		✓		✓			✓	N/A		Edit Delete
Canadian ID Card	Individual	✓	✓		✓			✓	N/A	TIKS Office TIKS Office 2	Edit Delete
Construction Industry Inductio...	Individual	✓	✓		✓	✓	✓	✓	N/A	TIKS Office	Edit Delete
Contractor Company Licence	Company		✓		✓			✓		N/A	Edit Delete
First Aid Certificate	Individual		✓		✓			✓	N/A		Edit Delete
Other Company Insurance	Company		✓		✓			✓		N/A	Edit Delete
Other Company Licence	Company		✓		✓			✓		N/A	Edit Delete
Professional Indemnity Insuran...	Company	✓	✓	✓	✓		✓	✓		N/A	Edit Delete
Proof of Identity (e.g. driver...	Individual		✓		✓			✓	N/A		Edit Delete
SWMS _ Confined Entry (Roof)	Company	✓	✓	✓	✓			✓	✓	Procure Demo TIKS Office 2	Edit Delete

Step 3: Give this record a Name/title e.g. "Safe Work Method Statement"

The screenshot shows a web form titled "Add Record Type" with a close button in the top right corner. The form contains two input fields: "Name" with a document icon and "Category" with a lock icon and a dropdown arrow. Below these are eight checkboxes, all of which are currently unselected. An orange "Save" button is located at the bottom right of the form.

Field	Value
Name	
Category	
Active?	<input type="checkbox"/>
Document Upload?	<input type="checkbox"/>
Expiry Required?	<input type="checkbox"/>
Number/ID Required?	<input type="checkbox"/>
Country Required?	<input type="checkbox"/>
State Required?	<input type="checkbox"/>
Approval Required?	<input type="checkbox"/>
Worker Sign Off Required?	<input type="checkbox"/>

Step 4: To apply this type of record to Contractor Companies, select "Company" in the "Category" dropdown list and select the options which are relevant for this record. To activate the record select the "Active?" check box (this will apply the record to all companies). Once done, click "Save".

The screenshot shows the same "Add Record Type" form, but now with three checkboxes selected: "Active?", "Document Upload?", and "Approval Required?". The "Name" field contains the text "Safe Work Method Statement" and the "Category" dropdown is set to "Company". The "Save" button remains at the bottom right.

Field	Value
Name	Safe Work Method Statement
Category	Company
Active?	<input checked="" type="checkbox"/>
Document Upload?	<input checked="" type="checkbox"/>
Expiry Required?	<input type="checkbox"/>
Number/ID Required?	<input type="checkbox"/>
Country Required?	<input type="checkbox"/>
State Required?	<input type="checkbox"/>
Approval Required?	<input checked="" type="checkbox"/>
Worker Sign Off Required?	<input type="checkbox"/>

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