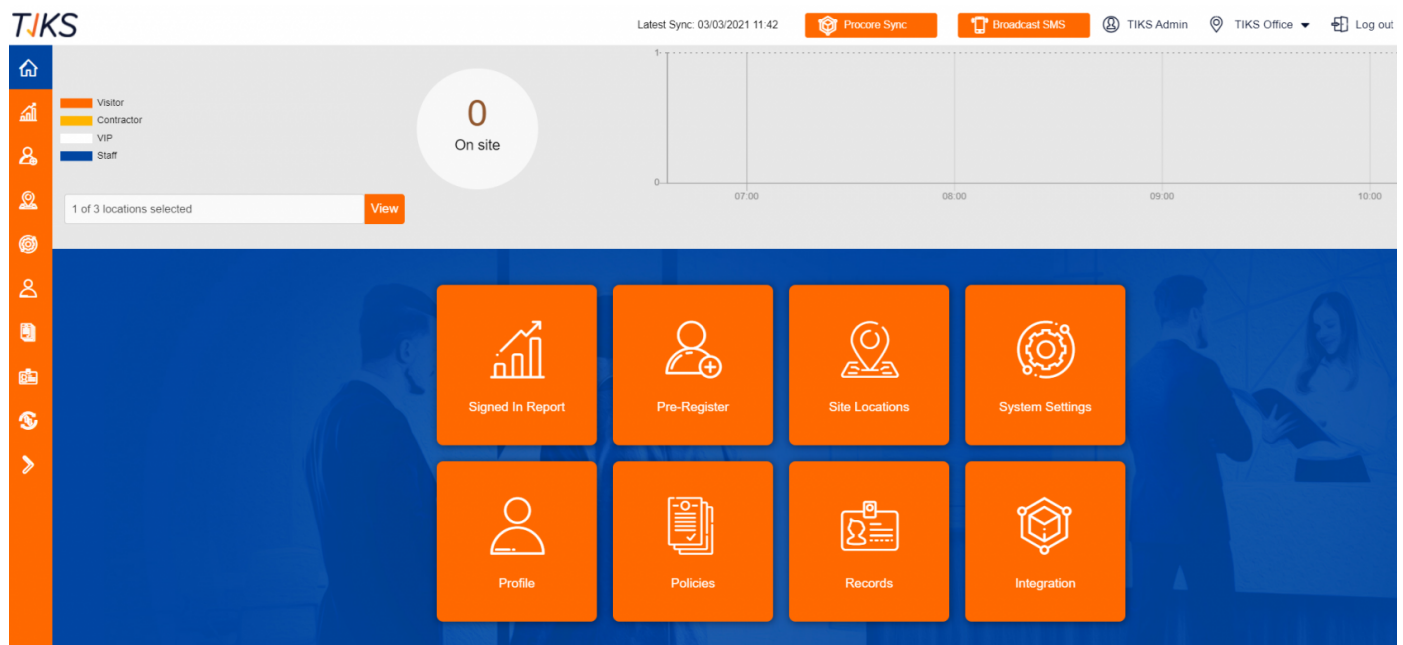
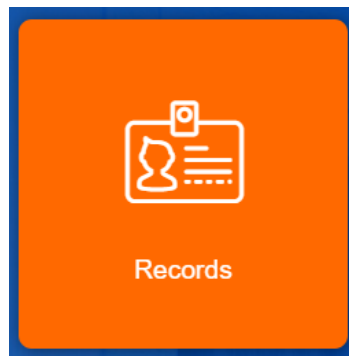


How do I set up Records for contracting companies?

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

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

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		✎ 🗑
Canadian ID Card	Individual	✓	✓		✓			✓	N/A	TIKS Office TIKS Office 2	✎ 🗑
Construction Industry Inductio...	Individual	✓	✓		✓	✓	✓	✓	N/A	TIKS Office	✎ 🗑
Contractor Company Licence	Company		✓		✓			✓		N/A	✎ 🗑
First Aid Certificate	Individual		✓		✓			✓	N/A		✎ 🗑
Other Company Insurance	Company		✓		✓			✓		N/A	✎ 🗑
Other Company Licence	Company		✓		✓			✓		N/A	✎ 🗑
Professional Indemnity Insuran...	Company	✓	✓	✓	✓		✓	✓		N/A	✎ 🗑
Proof of Identity (e.g. driver...	Individual		✓		✓			✓	N/A		✎ 🗑
SWMS _ Confined Entry (Roof)	Company	✓	✓	✓	✓			✓	✓	Procure Demo TIKS Office 2	✎ 🗑

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

Document

Expiry

Number/ID

Country

State

Approval

×

Add Record Type

Name

Category

▼

Active?

☐

Document Upload?

☐

Expiry Required?

☐

Number/ID Required?

☐

Country Required?

☐

State Required?

☐

Approval Required?

☐

Worker Sign Off Required?

☐

Save

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".

×

Add Record Type

Safe Work Method Statement

Company

▼

Active?

☒

Document Upload?

☒

Expiry Required?

☐

Number/ID Required?

☐

Country Required?

☐

State Required?

☐

Approval Required?

☒

Worker Sign Off Required?

☐

Save

Revision #1

Created 3 years ago by [Admin](#)

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