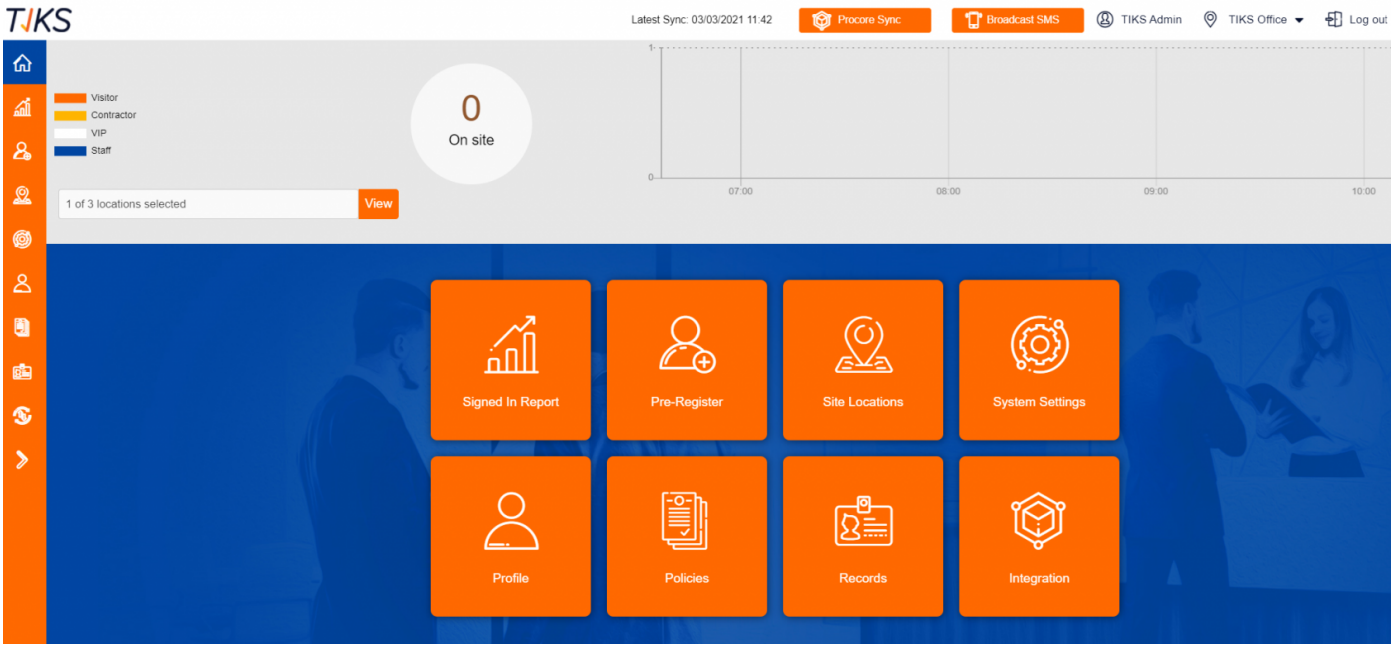
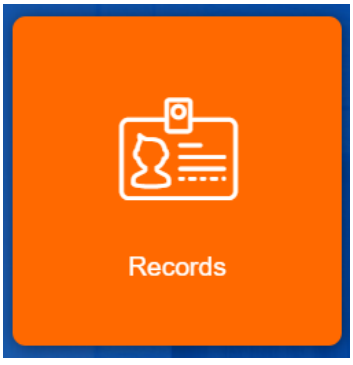
How do I set up records for Individual Workers?

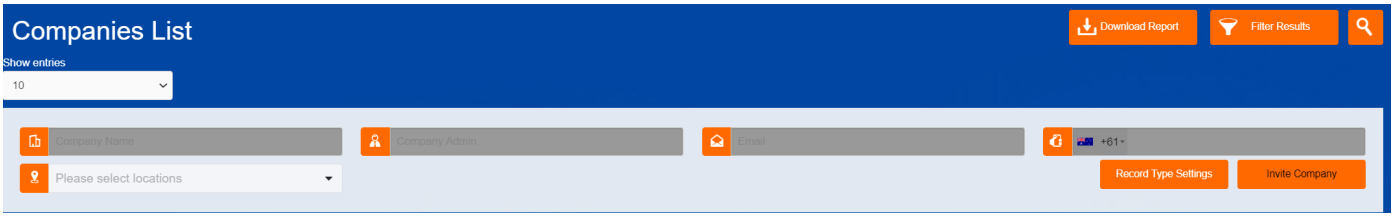
Log into the admin portal.



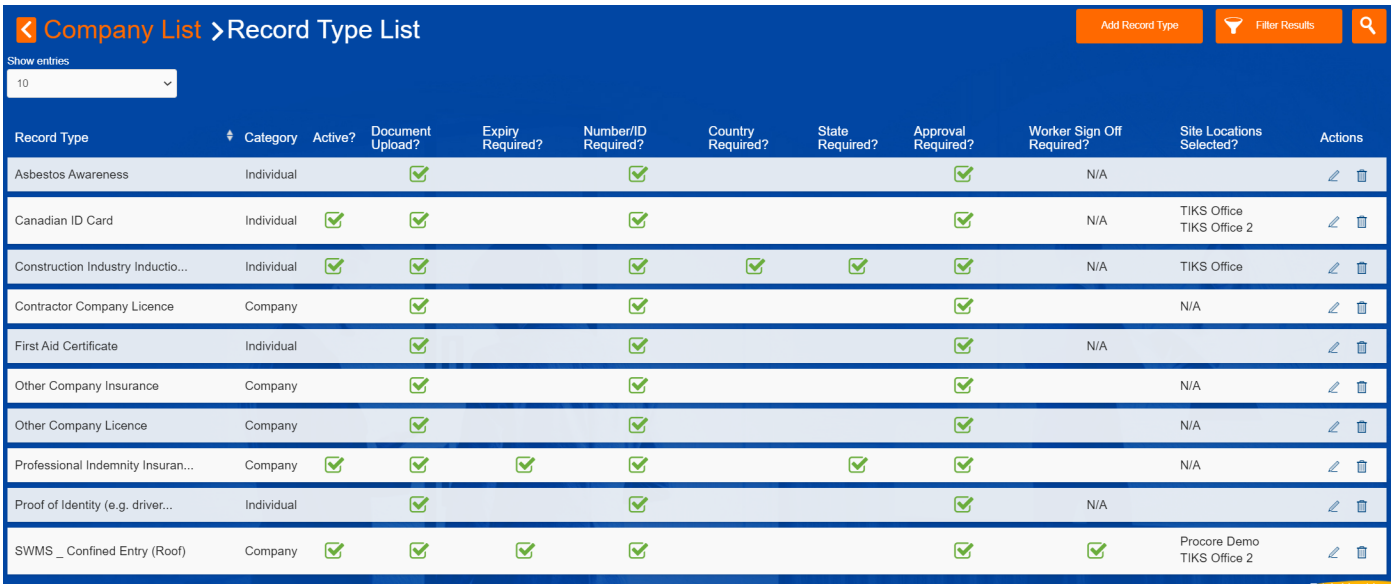
Select the "Records" tile.



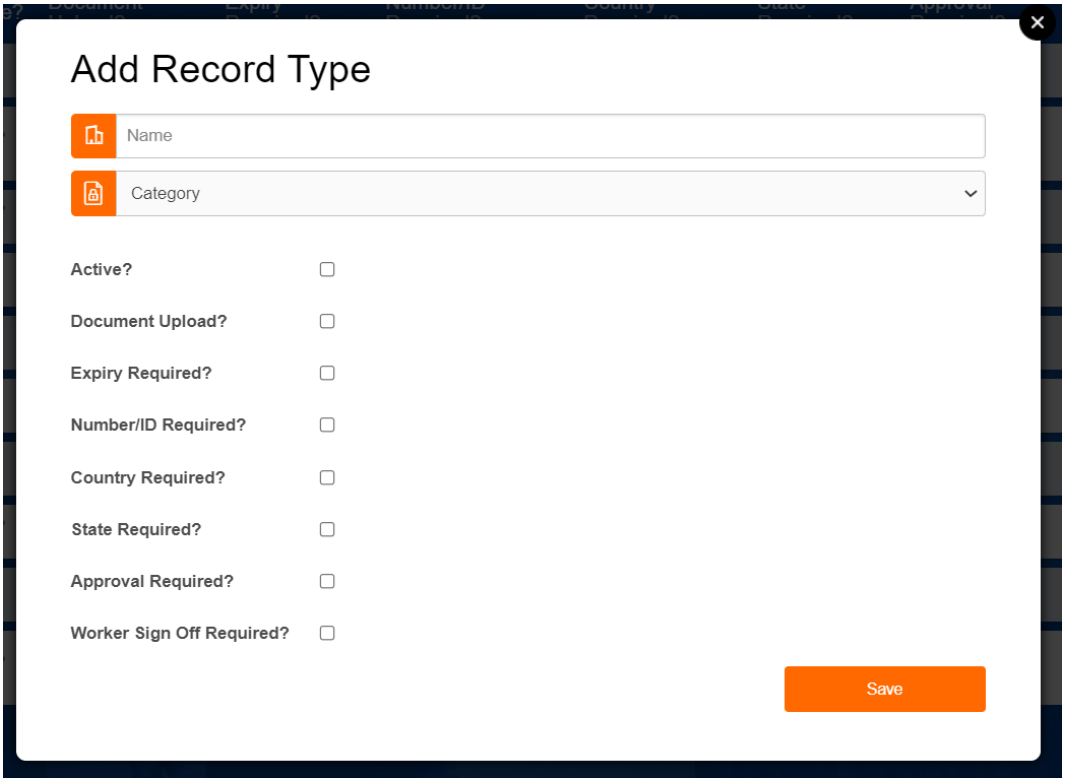
Step 1: Select “Records Type Settings” at the top of the page.



Step 2: Select "Add Record Type"

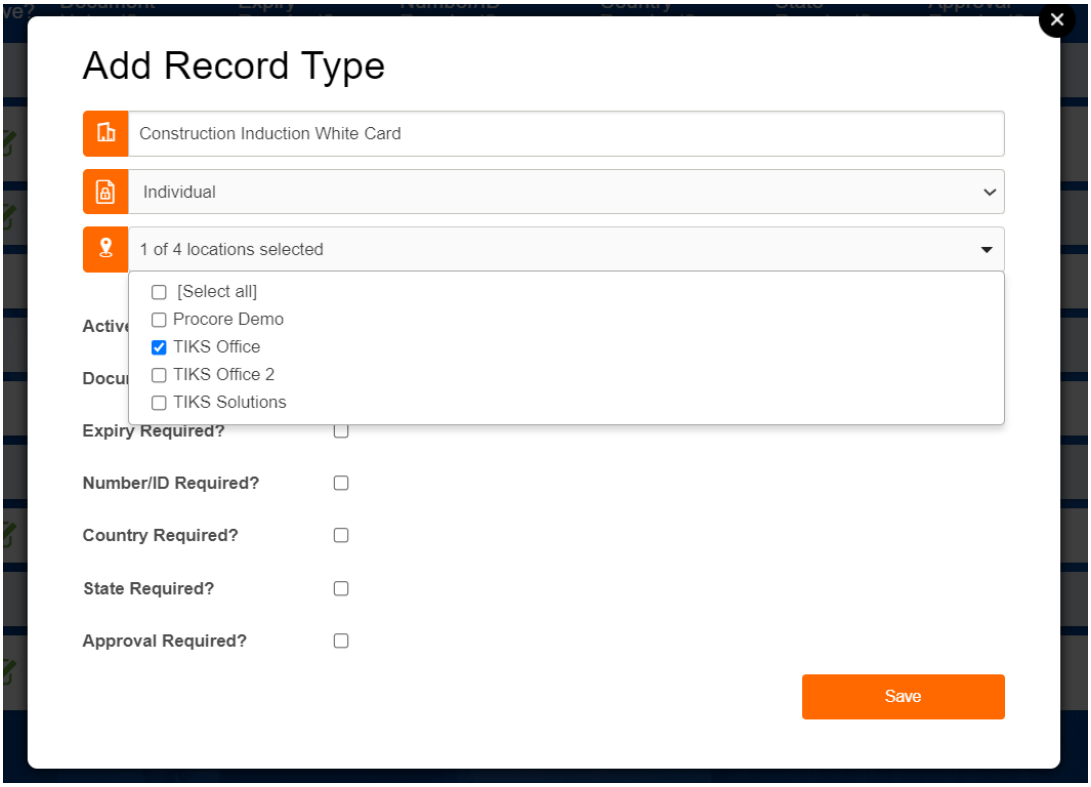


Step 3: Give this record a Name/title e.g. "Construction Induction White Card"



Step 4: To apply this Record to individual workers, select "Individual" in the Category dropdown list.

Step 5: Select which site or sites this requirement will apply to. Then 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 workers for the site/s). Once done, click "Save".



Revision #1
Created 3 years ago by Admin
Updated 3 years ago by Admin