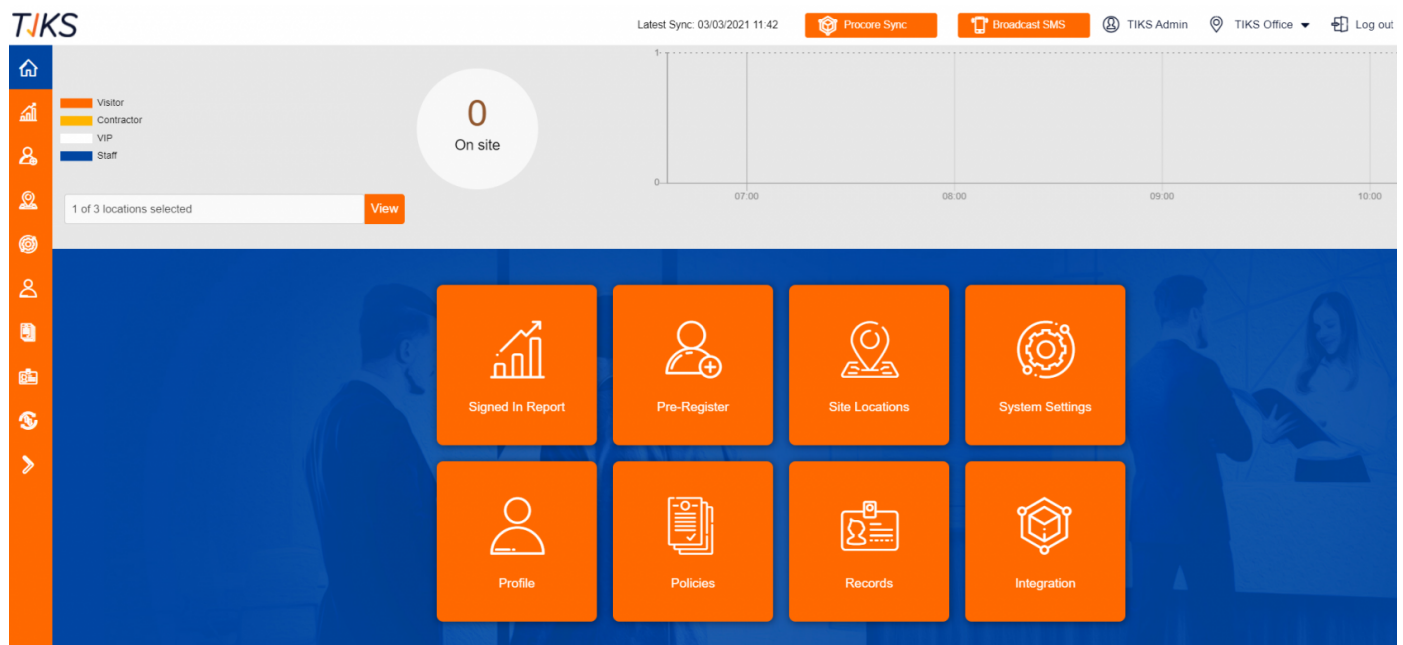
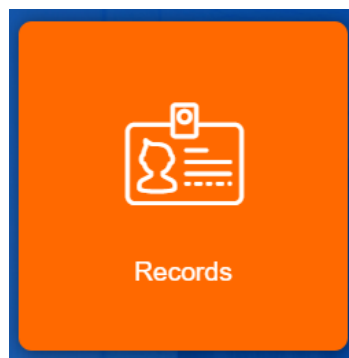


How do I set up records for Individual Workers?

Log into the admin portal.



Select the "Records" tile.



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

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. "Construction Induction White Card"

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 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".

Add Record Type

Construction Induction White Card

Individual

1 of 4 locations selected

Active? ☒

Document Upload? ☐

Expiry Required? ☐

Number/ID Required? ☐

Country Required? ☐

State Required? ☐

Approval Required? ☐

Save

[Select all]

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Revision #1

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