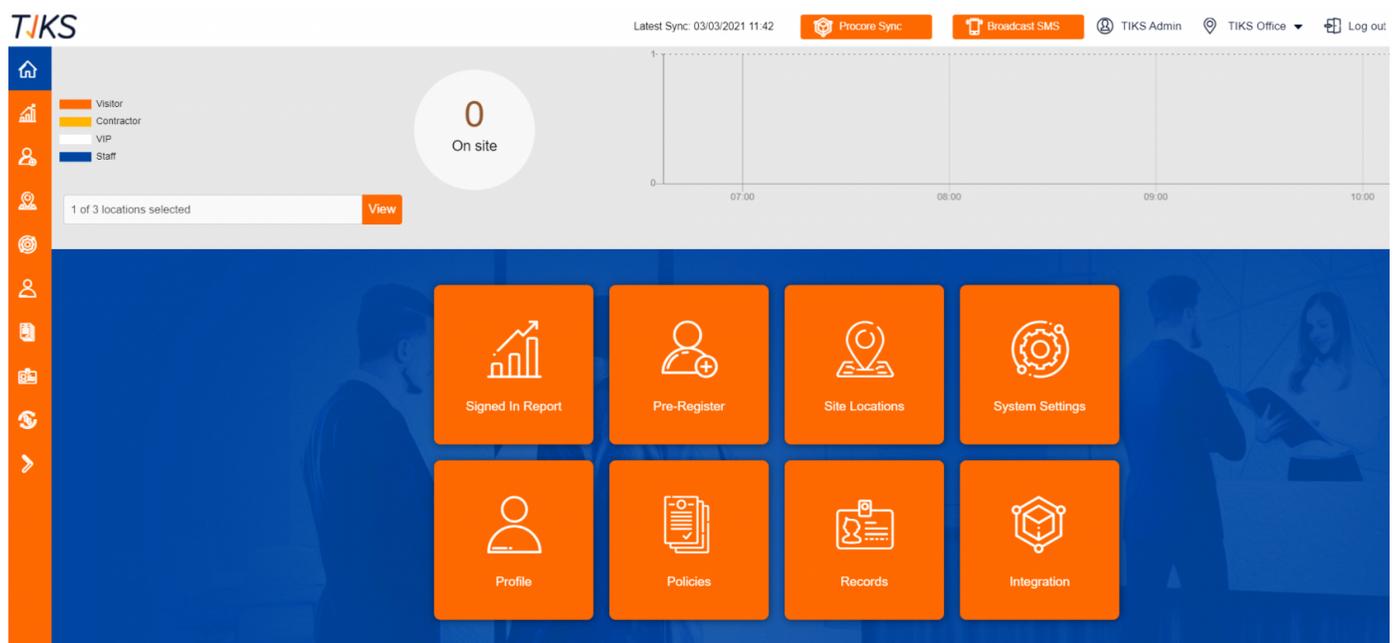
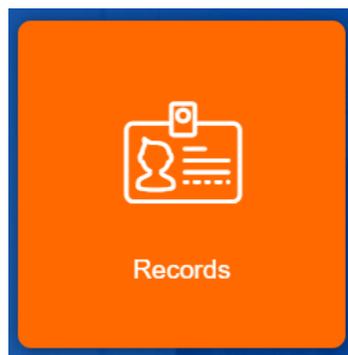


How do I set up records for Individual Workers?

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 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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	N/A		Edit Delete
Canadian ID Card	Individual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	N/A	TIKS Office TIKS Office 2	Edit Delete
Construction Industry Inductio...	Individual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	TIKS Office	Edit Delete
Contractor Company Licence	Company		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		N/A	Edit Delete
First Aid Certificate	Individual		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	N/A		Edit Delete
Other Company Insurance	Company		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		N/A	Edit Delete
Other Company Licence	Company		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		N/A	Edit Delete
Professional Indemnity Insuran...	Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		N/A	Edit Delete
Proof of Identity (e.g. driver...	Individual		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	N/A		Edit Delete
SWMS _ Confined Entry (Roof)	Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Procure Demo TIKS Office 2	Edit Delete

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

Revision #1

Created 3 years ago by [Admin](#)

Updated 3 years ago by [Admin](#)