

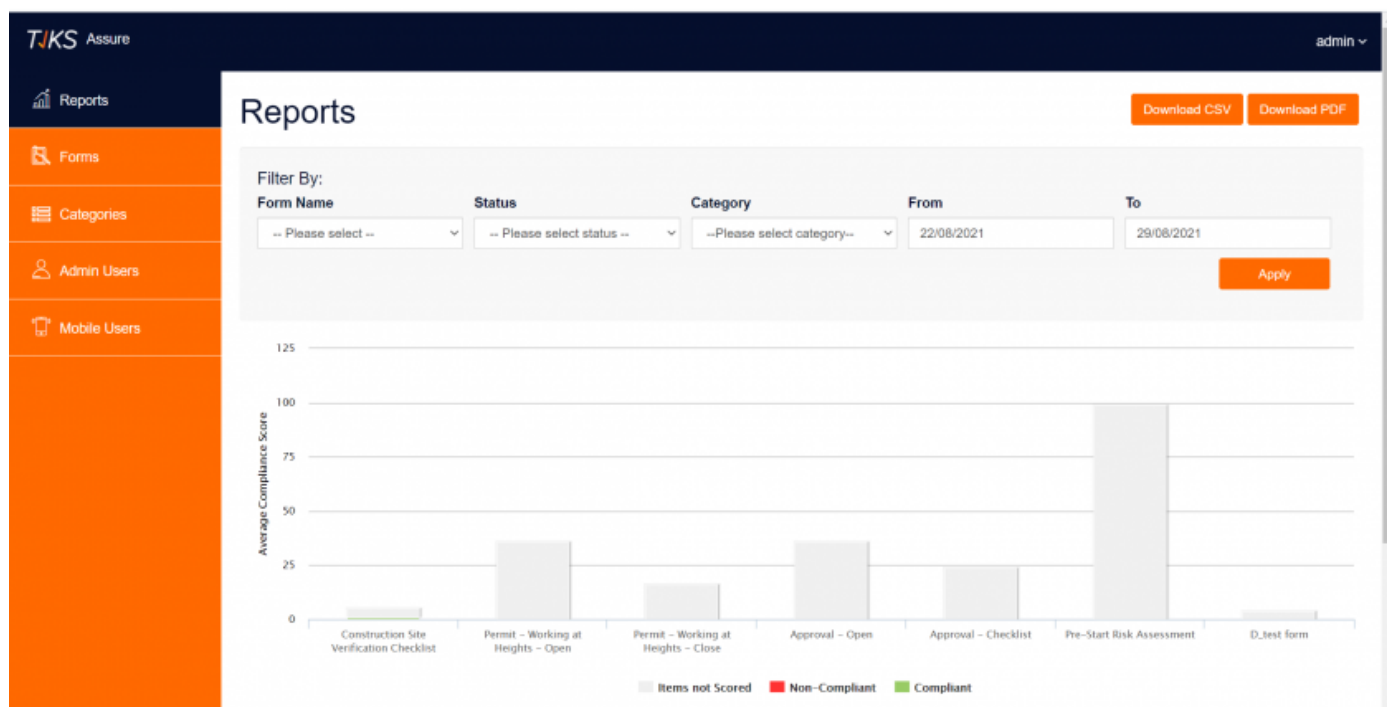
# Admin Portal

Welcome to the Auditor's admin portal. At the left of your page are menu tabs; these are Reports, Forms and Categories, User and Mobile User. From Auditor's admin portal you can manage and create forms, categories and generate reports.

- [Reports](#)
- [Forms](#)
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# Reports

After logging into Auditor's admin portal, the default-landing page is Reports. All data that is captured using Auditor's app is seen here. Auditor has the reports function that allows you to filter through data, generate reports and export results as a CSV or PDF file. Reports will only ever display data from active forms that have been filled at least once. As the data set increases in size the report graphs adapt to display the information.



## Filter Report Data

To filter report data, simply select your range criteria from the drop down menu and press the blue *Apply* button to narrow/ refine your search.

# Reports

[Download CSV](#)[Download PDF](#)

Filter By:

Form Name

Status

Category

From

To

-- Please select --

-- Please select status --

--Please select category--

22/08/2021

29/08/2021

Apply

- ‘Filter By’ ranges include Form types and Date range.
- Reports results are displayed as a bar graph.

## Reports Graph

Reports graph displays the following values: Not Scored, Non-Compliant and Compliant as a bar graph. Each bar represents an individual form. The Y-axis represents total compliance score; the X-axis represents the name of a form.

The following table indicates score value:

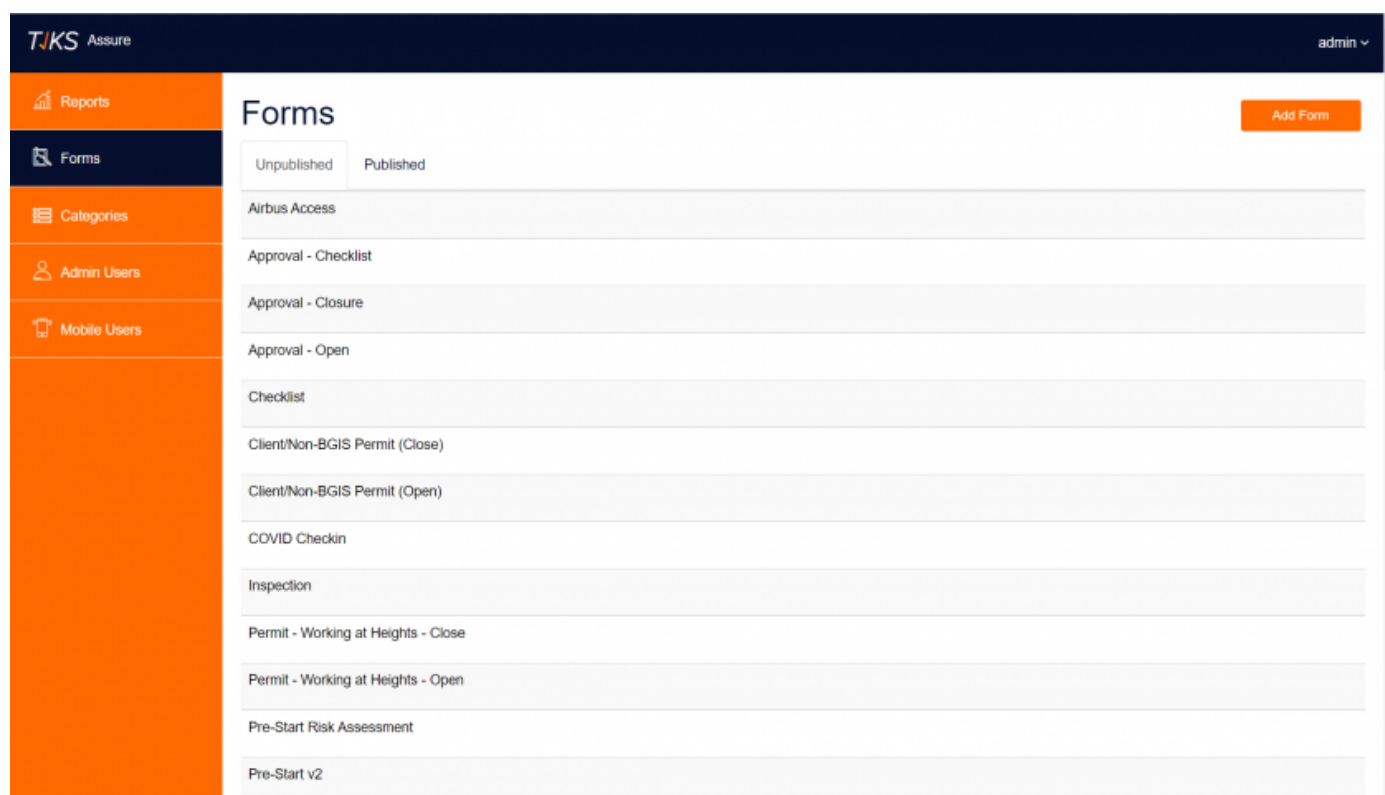
Score Value	Colour Code
Items not scored	Grey
Non-compliant	Red
Compliant	Green

- Hide/unhide any score by clicking on its corresponding label, doing this will alter the graph too.
- The Report Graph is interactive; when a cursor is hovered over a bar, numeric points will display data within your selected date range.

# Forms

Forms tab is located on the menu bar at the left of your screen. Create new forms, edit or clone existing forms and sort forms into categories. Forms are divided into two main groups: Published and Unpublished.

*Note: Mobile users cannot view or use Unpublished forms\**

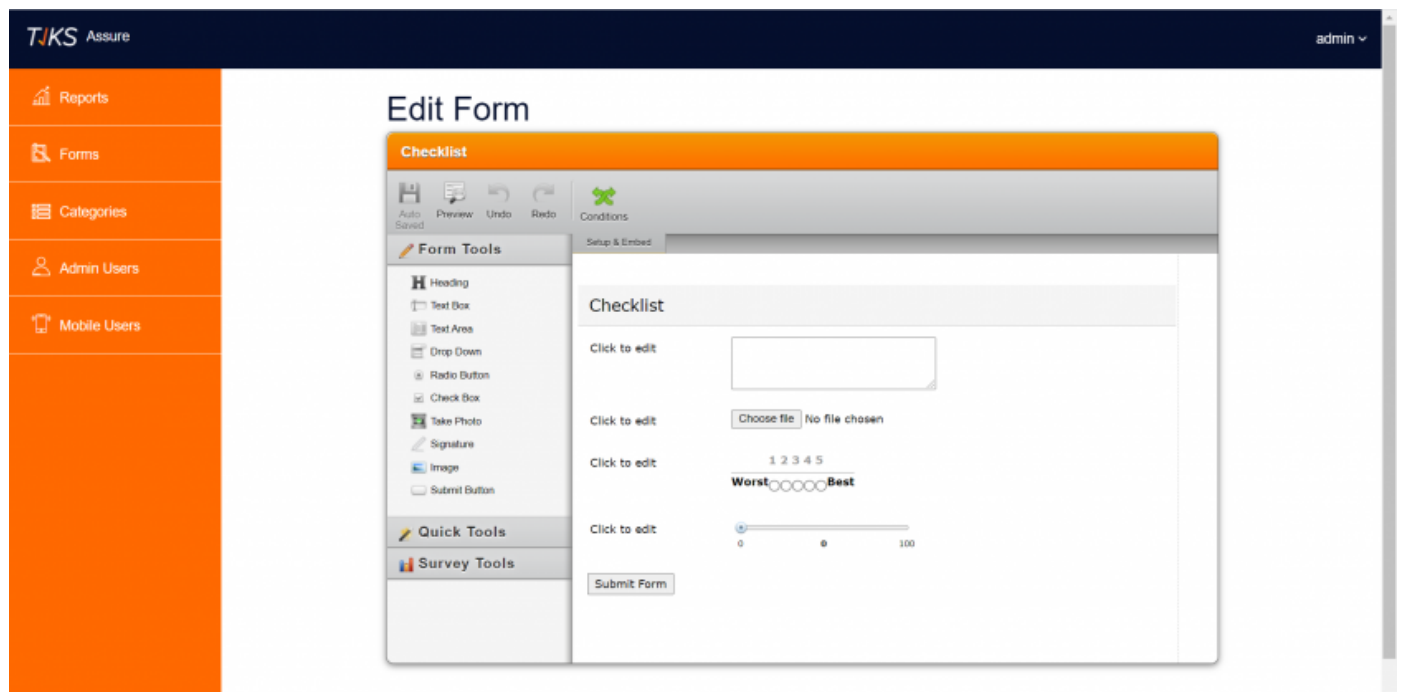


## Unpublished Forms

Unpublished forms are forms that have not yet been Published into categories. Auditor users are not able to view or use Unpublished forms. Forms that are in the process of being edited are saved and can be accessed from this page at a later time. Hovering the cursor over a form will bring up its options. Edit a form, sort a form into categories, set recipients, or delete a form.

## Edit a form

To edit a form, select the blue *Edit* button on the right hand side of the table, this will launch the Auditor form builder.



## Publishing a form

To sort a form into categories, bring up the form options by clicking the blue *arrow* button. A drop down menu will appear, select *Publish* from the list. You will be taken another page that displays all categories; select the check box/boxes of the categories that form will belong to.

- Forms are managed via categories (see below).
- After a form is Published, users will be able to see and use the form on their mobile device via the Auditor app.

## Published Forms

Published forms are forms that have been Published into at least one category. Once a form is Published, users can view and use forms on their mobile device via the Auditor app.

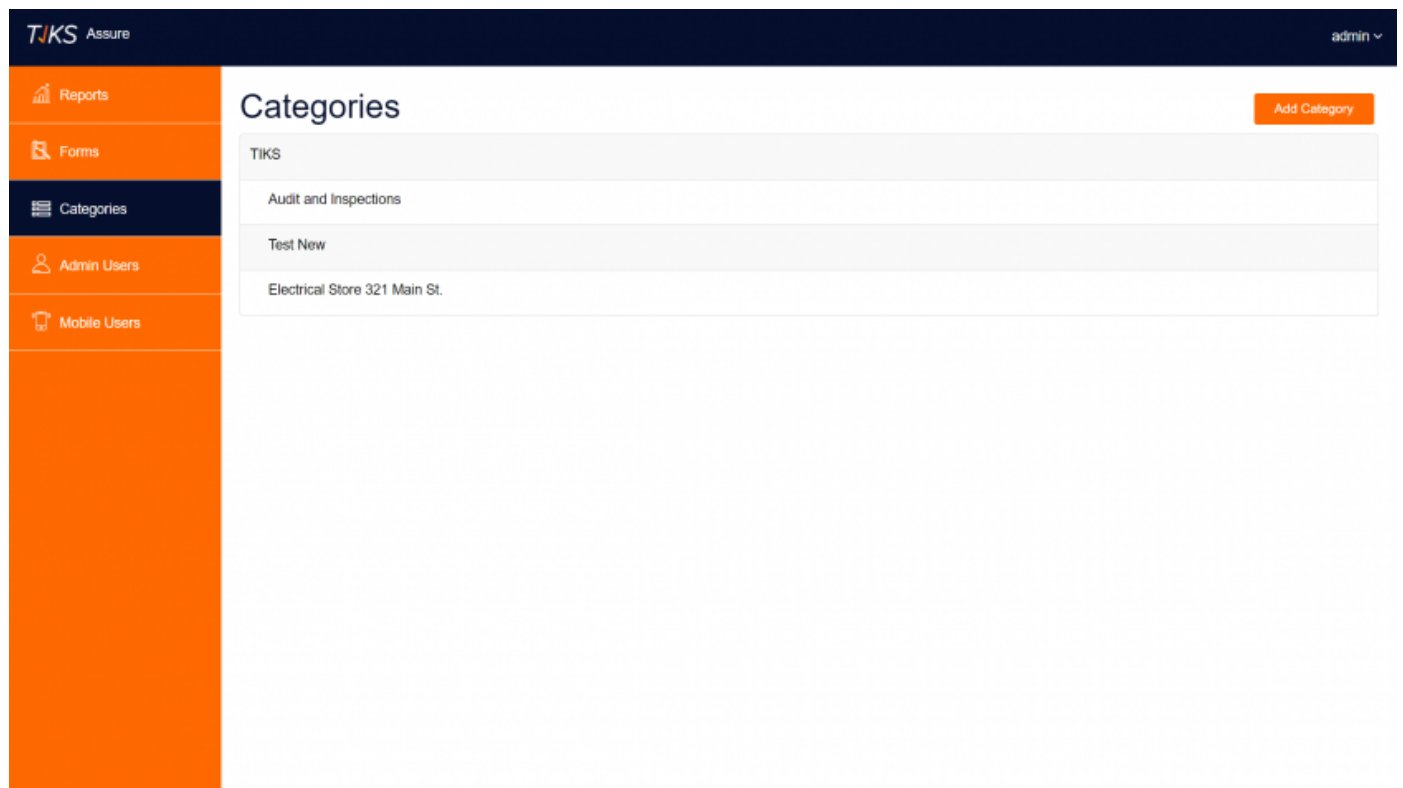
- Forms can belong to more than once category;
- Forms that belong to more than one category will display these labels separated by commas.

# Categories

Categories tab is located on the menu bar at the left of your screen. Create new categories, edit or delete existing categories.

## Families

Families are different groups that forms are Published into. Users see families' in-app as a levelled menu. Families make it easy for users to find forms.



The screenshot shows the 'Categories' page in the TIKS Assure application. The left sidebar contains navigation links: Reports, Forms, Categories (highlighted), Admin Users, and Mobile Users. The main content area is titled 'Categories' and features an 'Add Category' button. Below the title is a table with the following data:

TIKS
Audit and Inspections
Test New
Electrical Store 321 Main St.

## Add Category

To add categories select the blue *Add Category* button. This will bring you to a new page, which displays a list of all existing categories.

- To add new categories simply type a label into the *Title* field;
- Then select which family it can be accessed from.
- New categories can only be assigned to one family group.

## Edit Categories

By editing a category you can either update the title – or change the family it belongs to. To edit a category, hover the cursor to bring up the blue *Edit* button. Selecting edit will bring you to a new page; this displays a list of all categories.

- Note that categories being edited do not display a radio button.
- To finish editing a category, select the green *Update*

## Delete Categories

You may need to delete a category if it is no longer valid. To delete a category select the red Delete button. Auditor will prompt you to confirm your decision through a browser alert.

- Select 'OK' to confirm
- If you do not wish to delete select 'Cancel'

Forms can belong to more than one category. If a form belongs to a single category and that category is deleted, the form will return to *Unpublished Forms*\*



# Admin Users

Admin Users can be added by another administrator user.

TJKS Assure

admin

Reports

Forms

Categories

Admin Users

Mobile Users

Users

Manage (1)

+ Create User

Username	Email	Role	Action
admin	support@tjks.com.au	<div>Report</div> <div>Category &amp; Form</div> <div>Super User</div>	<div>Edit</div> <div>Delete</div>

# Mobile Users

Mobile Users can be approved by Admin Users with the appropriate permissions.

Users can be approved by clicking the Approved button in line with the user row.

TIKS Assure

admin

Reports

Forms

Categories

Admin Users

Mobile Users

Mobile Users Manage (13)

Show 10 entries

Search:

Name	Email	Phone	Approved	UserType	Action
Alex Tiks	alex@tiks.com.au	+61422423450	✓	Contractor	<div>Edit</div> <div>Deny</div>
Alex TIKS	alex+2@tiks.com.au	+61422423450	✗	Employee	<div>Edit</div> <div>Approve</div>
ALex TIKS	alex+3@tiks.com.au	+61422423450	✓	Employee	<div>Edit</div> <div>Deny</div>
Alex Tiks	alex+4@tiks.com.au	+61422423450	✓	Contractor	<div>Edit</div> <div>Deny</div>
Rob Auditor	rob+auditor@tiks.com.au	+61400378977	✓	Contractor	<div>Edit</div> <div>Deny</div>
Robert Milagre	rob@tiks.com.au	+61400 378 977	✓	Contractor	<div>Edit</div> <div>Deny</div>
Sam Marciano	sam@tiks.com.au	+61421 969 482	✓	Contractor	<div>Edit</div> <div>Deny</div>
Sam Marciano	sam+user@tiks.com	+61421 969 482	✓	Contractor	<div>Edit</div> <div>Deny</div>
Sam Marciano	sam+test@tiks.com.au	+61421 969 482	✓	Contractor	<div>Edit</div> <div>Deny</div>
Support Android	support+android@tiks.com.au	+61401 234 567	✓	Contractor	<div>Edit</div> <div>Deny</div>

Showing 1 to 10 of 13 entries

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