

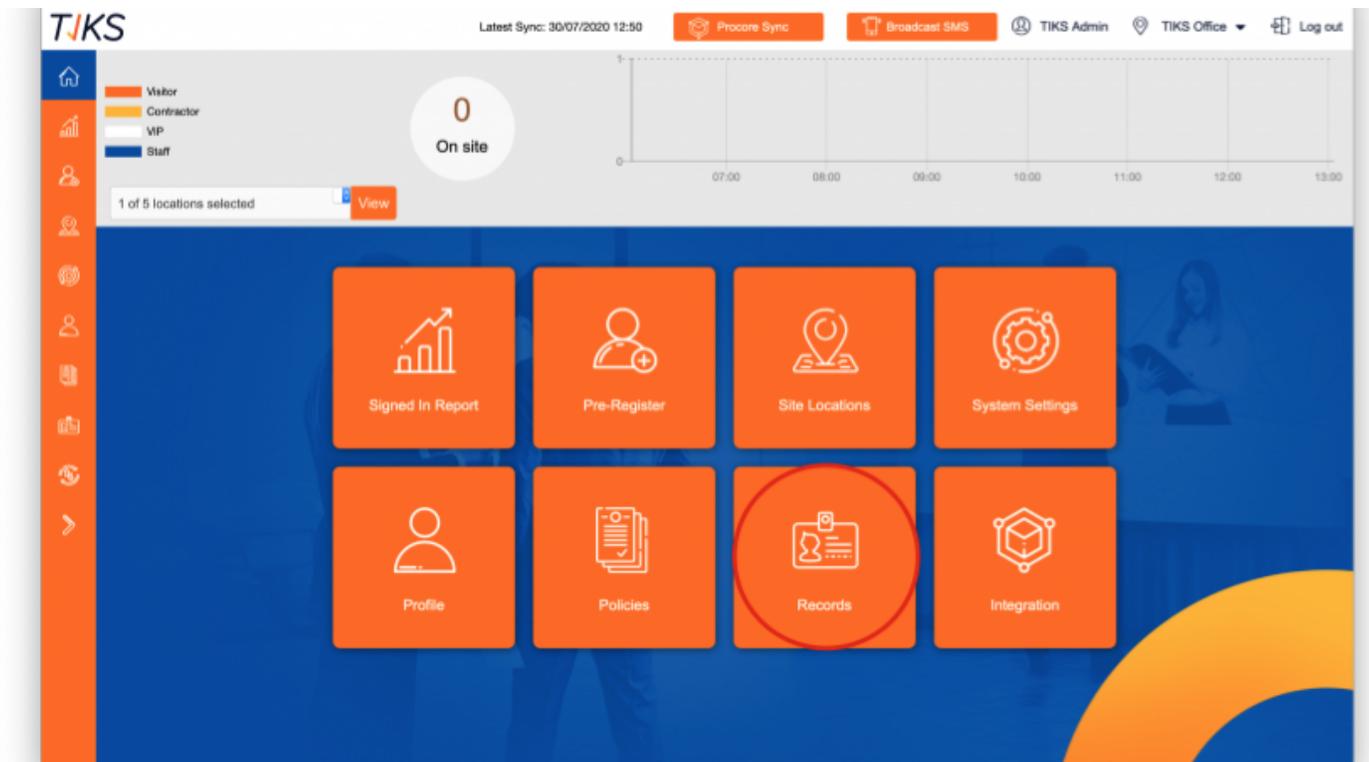
How to Set Up and Approve Requirements on Records

- [How to Set Up Records for Contractor Companies](#)
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- [How to Set Up Inductions for Site Locations](#)

How to Set Up Records for Contractor Companies

How to Set Up Records for your Contracting Companies

1. Log into the admin portal
2. Tap on the "Records" button



Step 1: Tap on the "Records Type Settings"

Companies List

Show entries: 10

Test Company | Sam Marciano | sam+test@tik.com.au | +61 0421969482

1 of 3 locations selected

- [Select all]
- Milagre Site
- TIKS Office
- TIKS Test Site

Record Type Settings | Invite Company

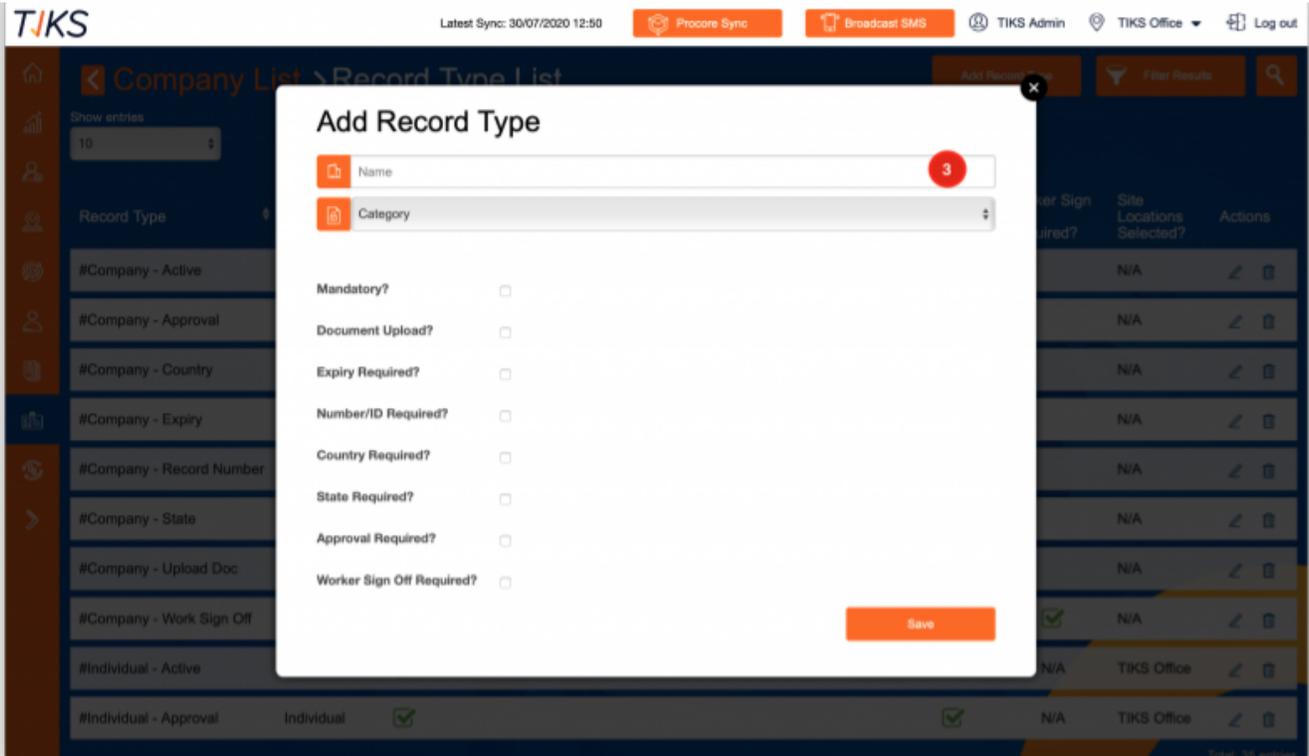
Company	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals ¹ View Records ↶ 🗑️
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ↶ 🗑️
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ↶ 🗑️

Step 2: Tap on the "Add Records Type"

Company List > Record Type List											
Record Type	Category	Mandatory?	Document Upload?	Expiry Required?	Number/ID Required?	Country Required?	State Required?	Approval Required?	Worker Sign Off Required?	Site Locations Selected?	Actions
#Company - Active	Company	✓								N/A	✎ 🗑
#Company - Approval	Company	✓						✓		N/A	✎ 🗑
#Company - Country	Company	✓				✓				N/A	✎ 🗑
#Company - Expiry	Company	✓		✓						N/A	✎ 🗑
#Company - Record Number	Company	✓			✓					N/A	✎ 🗑
#Company - State	Company	✓					✓			N/A	✎ 🗑
#Company - Upload Doc	Company	✓	✓							N/A	✎ 🗑
#Company - Work Sign Off	Company	✓						✓		N/A	✎ 🗑
#Individual - Active	Individual	✓								N/A	TIKS Office ✎ 🗑
#Individual - Approval	Individual	✓						✓		N/A	TIKS Office ✎ 🗑

Total: 35 entries

Step 3: Give this record a Name/title ie: "Safe Work Method Statements"



Step 4: To make this record available to the Contractor Company, please select "**Company**" in the **Category** dropdown list and select the options which are relevant for this record. **Once done, please tap on the "Save" button.**

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

Expiry Required: Select this if you want to capture the expiry date of this record

Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked

Worker Sign Off Required: Select this option if you would like the Contractor Worker to acknowledge that they have viewed the information the Company has submitted against this record

Company List > Record Type List

Show entries: 10

Record Type

- #Company - Active
- #Company - Approval
- #Company - Country
- #Company - Expiry
- #Company - Record Number
- #Company - State
- #Company - Upload Doc
- #Company - Work Sign Off
- #Individual - Active
- #Individual - Approval

Add Record Type

Name

Company 4

Mandatory?

Document Upload?

Expiry Required?

Number/ID Required?

Country Required?

State Required?

Approval Required?

Worker Sign Off Required?

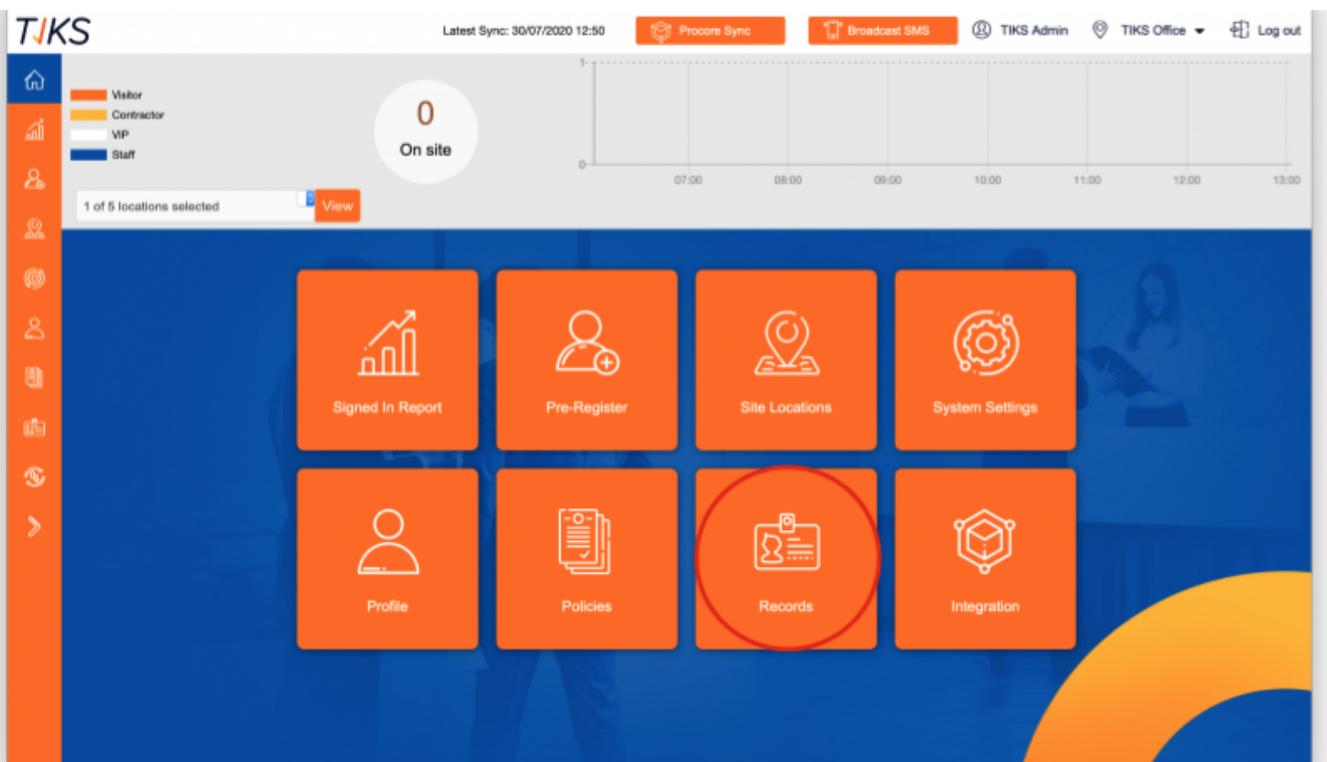
Save

Record Type	Company	Worker Sign Off Required?	Site Locations Selected?	Actions
#Company - Active		N/A		Edit Delete
#Company - Approval		N/A		Edit Delete
#Company - Country		N/A		Edit Delete
#Company - Expiry		N/A		Edit Delete
#Company - Record Number		N/A		Edit Delete
#Company - State		N/A		Edit Delete
#Company - Upload Doc		N/A		Edit Delete
#Company - Work Sign Off		<input checked="" type="checkbox"/>	N/A	Edit Delete
#Individual - Active		N/A	TIKS Office	Edit Delete
#Individual - Approval	Individual <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	TIKS Office Edit Delete

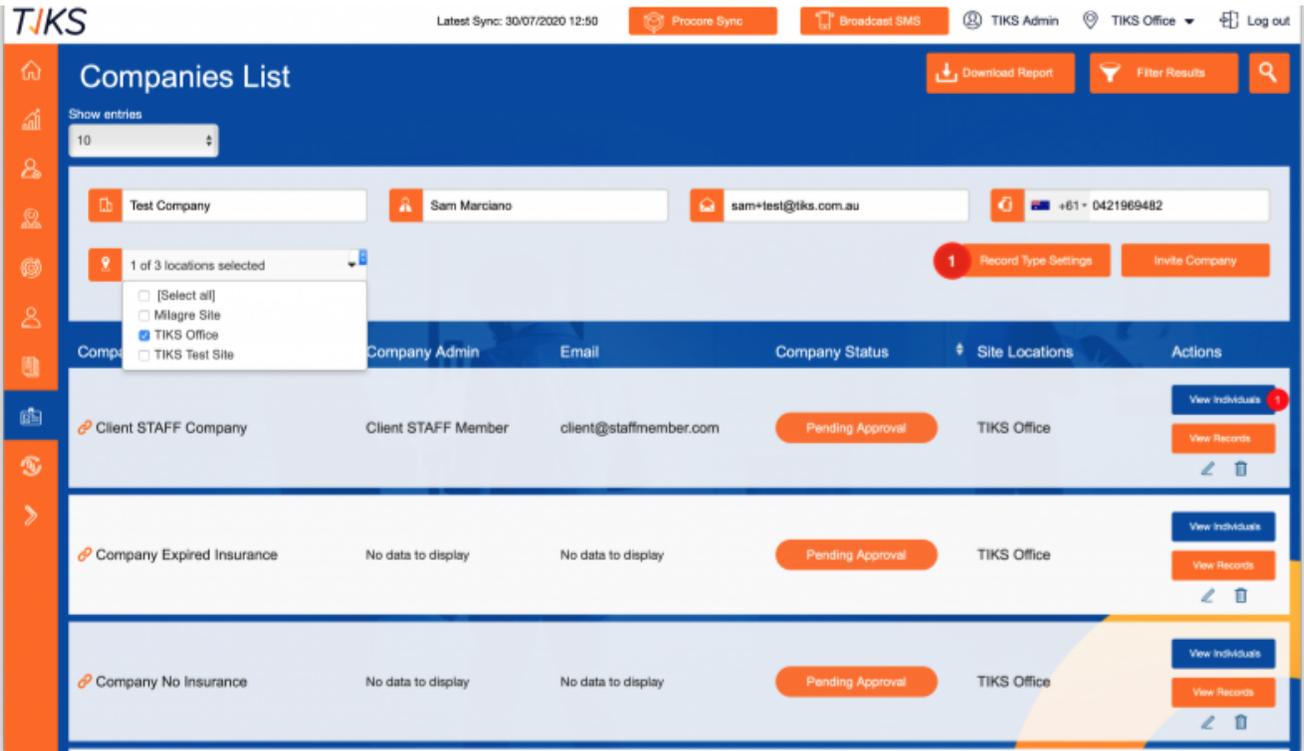
Total: 35 entries

How to Set Up Records for Individual Workers

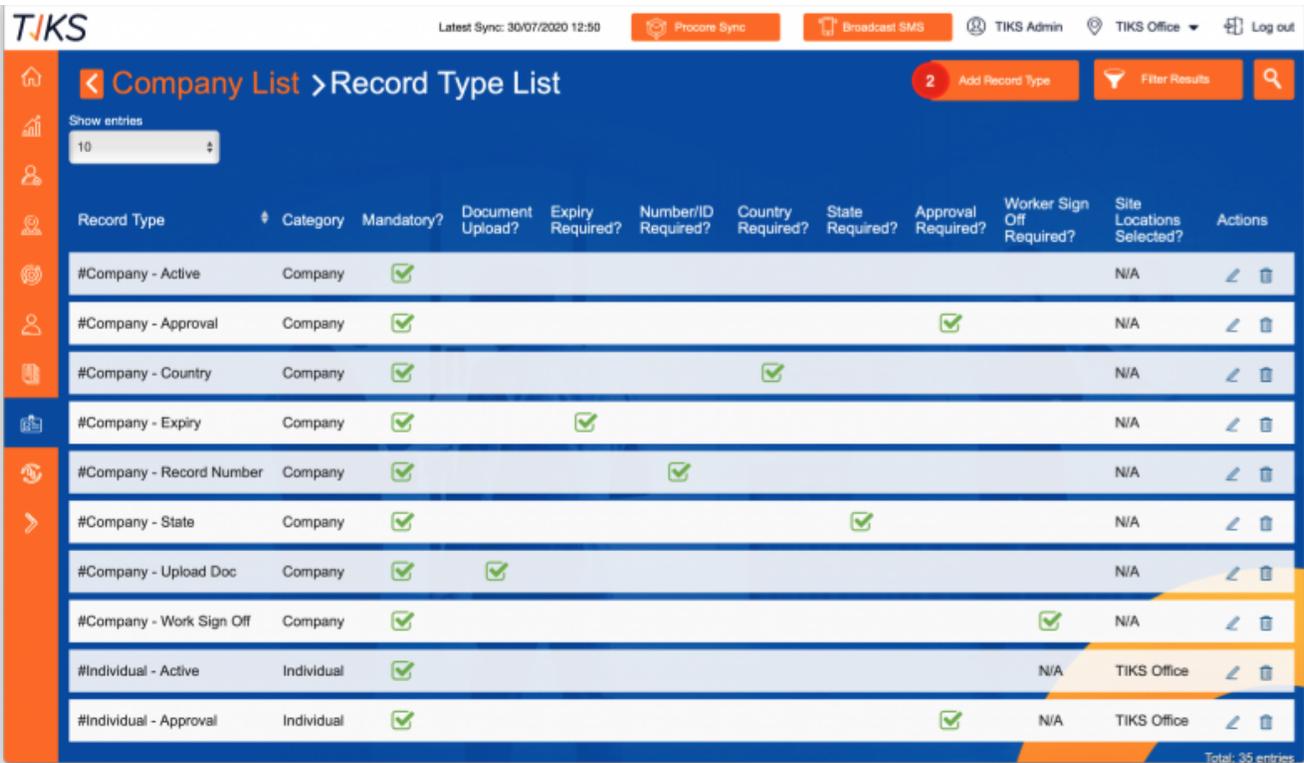
1. Log into the admin portal
2. Tap on the "Records" button



Step 1: Tap on the "Records Type Settings"



Step 2: Tap on the "Add Records Type"



Step 3: Give this record a Name/title ie: "Safe Work Method Statements"

The screenshot shows the 'Add Record Type' form in the TIKS system. The form is titled 'Add Record Type' and is overlaid on a 'Record Type List' page. The 'Name' field is filled with 'Safe Work Method Statements' and has a red notification bubble with the number '3'. The 'Category' dropdown menu is set to 'Individual'. Below the input fields, there are several checkboxes for optional requirements: 'Mandatory?', 'Document Upload?', 'Expiry Required?', 'Number/ID Required?', 'Country Required?', 'State Required?', 'Approval Required?', and 'Worker Sign Off Required?'. A 'Save' button is located at the bottom right of the form. The background shows a list of existing record types with columns for Name, Category, Mandatory, Document Upload, Expiry, Number/ID, Country, State, Approval, and Worker Sign Off.

Step 4: To make this record available to the Contractor Company, please select "**Individual**" in the **Category dropdown list** and select the options which are relevant for this record.

Definition of options:

Active: Select this if you require the Company to fill/respond back to this record type. You must select this to have the record displayed in the users Records List - it activates the record for completion.

Document Upload: Select this if you require the company to upload a file to support this record type

Expire Required: Select this if you want to capture the expiry date of this record

Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

County Required: Select this if you want to capture the Country this record is recognised for

State Required: Select this if you want to capture the State this record is recognised for

Approval Required: Select this if you wish to review and approve the record captured. If you do not need to review/verify this record, please leave this option un-checked

Step 5: Select which site this worker can work on in the check-box options available: **Once done, please tap on the "Save" button**

Company List

Show entries: 10

Record Type

- #Company - Active
- #Company - Approval
- #Company - Country
- #Company - Expiry
- #Company - Record Number
- #Company - State
- #Company - Upload Doc
- #Company - Work Sign Off
- #Individual - Active
- #Individual - Approval

Add Record Type

Name

Individual 4

Please select locations

- [Select all]
- Milegre Site
- TIKS Office
- TIKS Test Site

Mand 5

Document Upload?

Expiry Required?

Number/ID Required?

Country Required?

State Required?

Approval Required?

Save

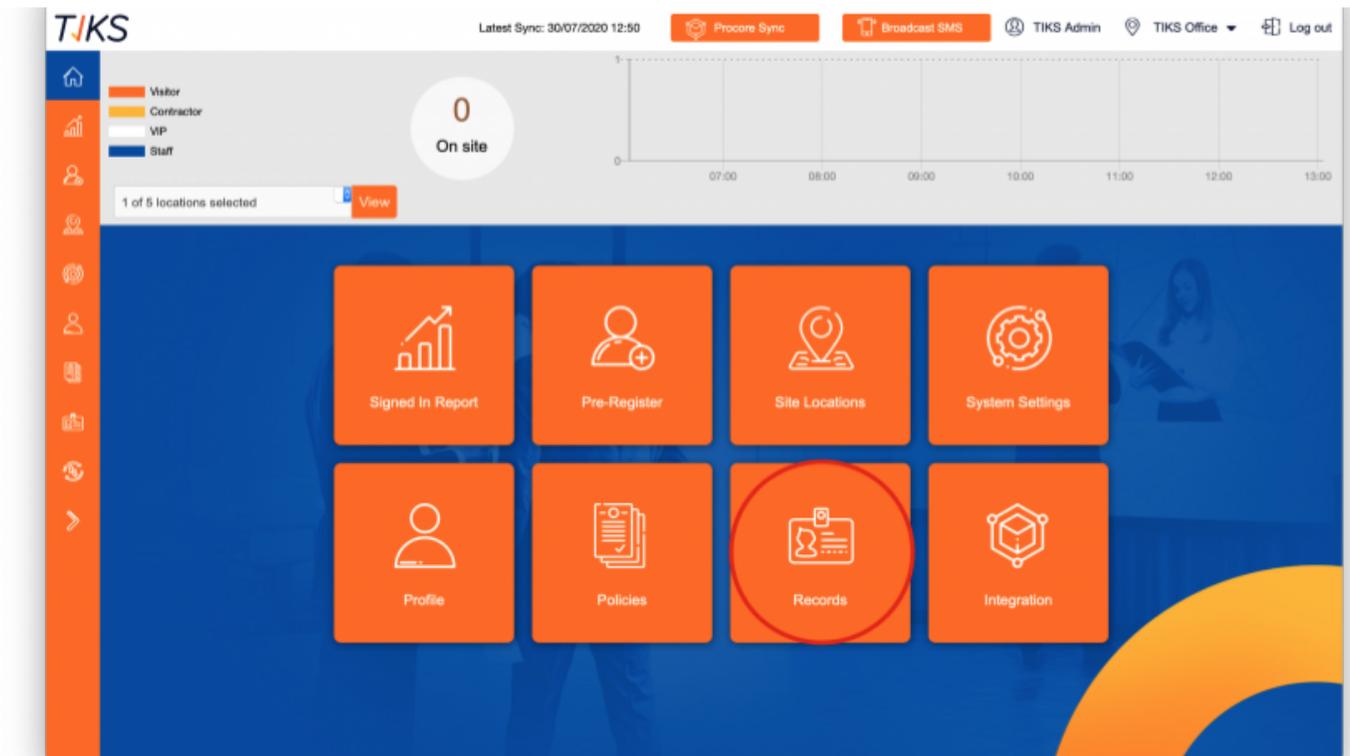
Work Sign Off?	Site Locations Selected?	Actions
N/A		Edit Delete
N/A		Edit Delete
N/A		Edit Delete
N/A		Edit Delete
N/A		Edit Delete
N/A		Edit Delete
N/A		Edit Delete
N/A		Edit Delete
N/A	TIKS Office	Edit Delete
N/A	TIKS Office	Edit Delete

Total: 30 entries

How to Approve or Reject Records

Review Records

1. Log into the admin portal
2. Tap on the "Records" button



Step 1: Tap on the search icon and type in the Company you wish to review. Alternatively, you can scroll down the page until you find that Company.

Companies List

Download Report Filter Results 1

Show entries
10

Company Name Company Admin Email +61
Please select locations Record Type Settings Invite Company

Company Name	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals View Records ↶ 🗑️
Company All Valid	admin one	admin@one.com	Pending Approval	TIKS Office	View Individuals 1 View Records ↶ 🗑️
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records ↶ 🗑️

Step 2: To view the records for this Company, tap on the "View Records" against the company listing

Companies List

Download Report Filter Results

Show entries: 10

Company Name Company Admin Email +61

Please select locations Record Type Settings Invite Company

Company Name	Company Admin	Email	Company Status	Site Locations	Actions
Client STAFF Company	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	View Individuals View Records 2
Company All Valid	admin one	admin@one.com	Pending Approval	TIKS Office	View Individuals 1 View Records
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records

Step 3: You will now see a list of records submitted by this company, to view documents that may have been uploaded, tap on the download document icon

Record Type	Record Number	Locations	Record Expiry	Record Status	Actioned By	Actions
Milagre Company and Worker Ack... Australia NSW	SWMS		24/07/2020	Expired Since: 23/07/2020 23:30	TIKS Admin	Approve Reject
###NEW SWMS				Pending Approval		Approve Reject
Mandatory Compnay Record				Pending Approval		Approve Reject
Please upload your Public Liab...				Pending Approval		Approve Reject

Step 4: To approve this record, tap on the "Approve" button. This will also allow you to add any comments you wish the Contractor Company Admin to see. Once approved, this record tile will go green.

To **Reject** this record, simply tap on the "Reject" button and add notes to help your Contractor understand what is needed for this record.

Milagre Construction... > Records List

Show entries

10

Record Type	Record Number	Locations	Record Expiry	Record Status	Actioned By	Actions
 Milagre Company and Worker Ack... Australia NSW	SWMS		24/07/2020	Expired Since: 23/07/2020 23:30	TIKS Admin	4  Approve  Reject  
 ###NEW SWMS				Pending Approval		 Approve  Reject  
 Mandatory Company Record				Pending Approval		 Approve  Reject  
 Please upload your Public Liab...				Pending Approval		 Approve  Reject  

How to Set Up Inductions for Site Locations

Site Locations

Site locations can be added manually by clicking Add Site. This is typically used when TIKS is used as a standalone package, not integrated to 3rd party applications.

Site Locations will be brought across to TIKS automatically if Procore integration is being used.

The screenshot displays the TIKS Site Locations management interface. At the top, there's a navigation bar with the TIKS logo, a sync status indicator (Latest Sync: 10/08/2020 15:27), and buttons for Procore Sync, Broadcast SMS, and TIKS Admin. The main content area is titled 'Site Locations' and includes a 'Show Archived' toggle. Below this, there's a 'Current Site' section and a table listing site locations. The table has columns for Map, Name, QR Code, Configurations, and Actions. Two sites are listed: 'TIKS Office' and 'Milagre Site'. The 'TIKS Office' entry shows a map, name, QR code, and a list of configurations including Record Administrators, Induction (12 Months), Print, Email, Photo, Active Site Location, and Date Format (DD/MM/YYYY). The 'Milagre Site' entry shows a map, name, QR code, and configurations including Record Administrators, Active Site Location, and Date Format (DD/MM/YYYY). Numbered callouts (1-8) highlight specific UI elements: 1. 'Show Archived' checkbox, 2. 'Map' column header, 3. 'Name' column header, 4. 'QR Code' column header, 5. 'Configurations' column header, 6. 'Actions' column header, 7. 'Add Site' button, and 8. User profile icon.

1. **Site Locations:** This section shows a list of all of the site locations also available to switch to. This also includes all of the same details as the Current Site which will be explained.
2. **Map:** This shows the map that is generated using a Google maps API from the input address.
3. **Name:** This is the naming of the site, generally companies use the naming convention of the site street in order to make searches easier.

4. **QR Code:** This is a unique string that is generated when a site location is created. This is the string used to create QR codes that you can display prominently at your site location for people to use if/ when you use the mobile integration for TIKS VMS.
5. **Configurations:** This shows at a glance the configurations set for the site, the max configurations it will show will be; Induction (?? Months), Print, Email and Photo. If these are in use, they will be shown with a coloured tick for that site.
6. **Actions:** There are 5 different actions you can select from that will be explained in the next section
7. **Add Site:** If you would like to add a new site to TIKS VMS, on the Site Location select the coloured “Add Site” button in the top right-hand corner, this will open up an Add Location pop-up. This will be explained further in a later. section.
8. **Search:** If you’d like to find a specific site in the Site Location page you can use this function. Simply select the coloured magnifying icon and a slightly translucent black bar will appear along the top of the page. You just start typing the desired search text and hit enter to complete your search.

Sites Actions

1. **Inductions:** If you select this button, you can view and edit the induction slides for that site. Depending on how your site is set up, you will be able to see 3 tabs on the inductions page; Visitor, Staff and Contractor. You can have different induction content for each of these different user types and it will be shown to them when signing in.
2. **Schedule:** This button allows you to leave a message on the tablet/kiosk for times when the desk is unmanned. It allows you to schedule an instruction message on the screen.
3. **Switch:** This function allows you to switch to the selected site (dependant on your permissions level). Once you have successfully switched you’ll see the site you’re logged into in the “Current Site” section and you’ll also see the site name appear in the top right-hand corner of the black bar.
4. **Edit:** This is the naming of the site, generally companies use the naming convention of the site street in order to make searches easier.
5. **Delete:** This will delete the Site Location.