

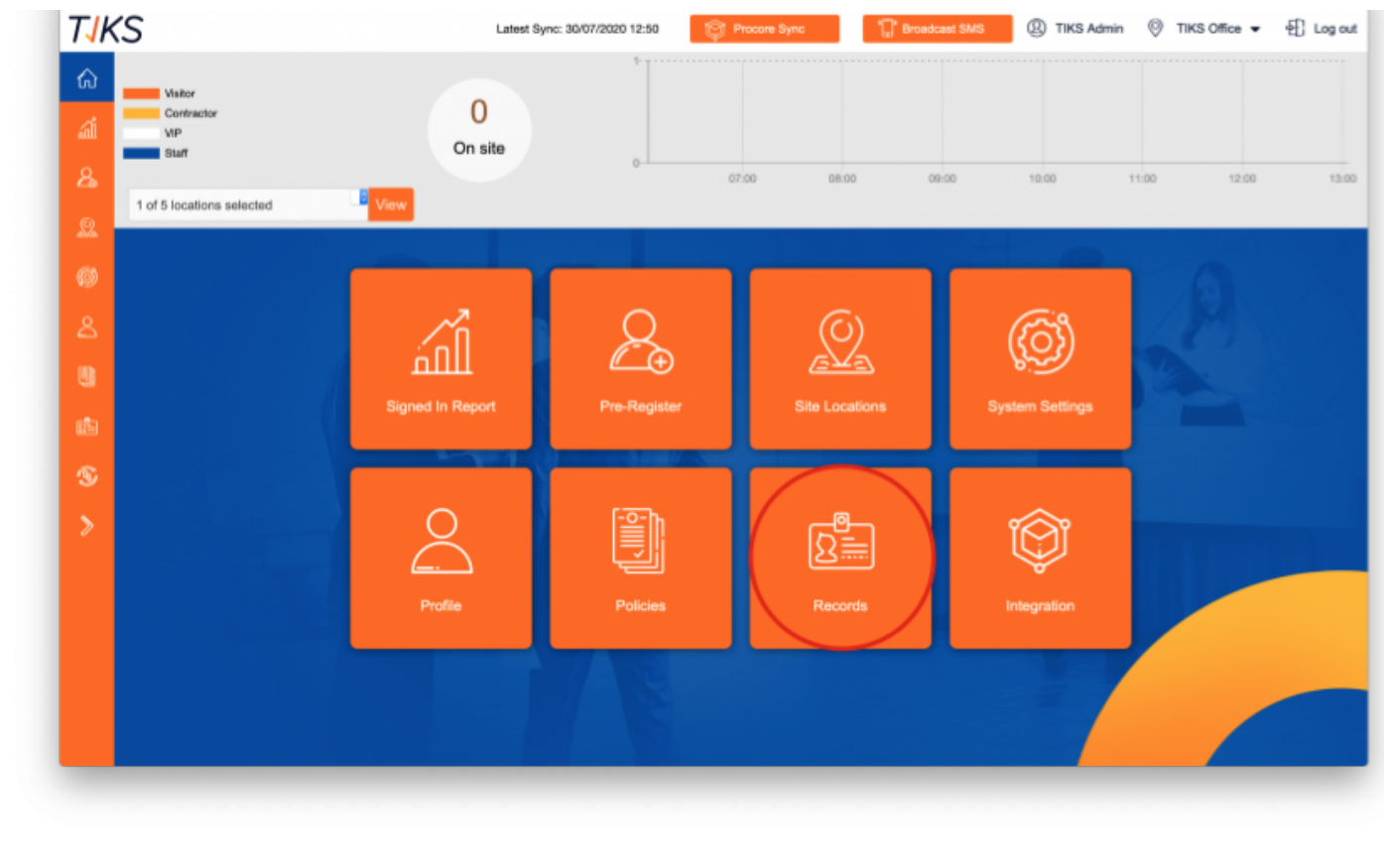
# How to Set Up and Approve Requirements on Records

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# 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"

TIKS

Latest Sync: 30/07/2020 12:50

Procore Sync

Broadcast SMS

TIKS Admin

TIKS Office

Log out

Companies List

Show entries

10

Test Company

Sam Marciano

sam+test@tiks.com.au

+61 0421969482

1 of 3 locations selected

☐ [Select all]

☐ Milagre Site

☒ TIKS Office

☐ TIKS Test Site

1

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	<div>View Individuals</div> <div>View Records</div>
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div>
Company No Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div>

Step 2: Tap on the "Add Records Type"

Company List > Record Type List											
2 Add Record Type											
Filter Results											
Show entries											
10											
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	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - Approval	Company	✓						✓		N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - Country	Company	✓				✓				N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - Expiry	Company	✓		✓						N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - Record Number	Company	✓			✓					N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - State	Company	✓					✓			N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - Upload Doc	Company	✓	✓							N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Company - Work Sign Off	Company	✓							✓	N/A	<a href="#">Edit</a> <a href="#">Delete</a>
#Individual - Active	Individual	✓							N/A	TIKS Office	<a href="#">Edit</a> <a href="#">Delete</a>
#Individual - Approval	Individual	✓						✓	N/A	TIKS Office	<a href="#">Edit</a> <a href="#">Delete</a>

Total: 35 entries

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

TIKS Latest Sync: 30/07/2020 12:50 Procure Sync Broadcast SMS TIKS Admin TIKS Office Log out

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

Individual

Mandatory?

Document Upload?

Expiry Required?

Number/ID Required?

Country Required?

State Required?

Approval Required?

Worker Sign Off Required?

Save

Record Type List

Record Type	Mandatory?	Site Locations Selected?	Actions
#Company - Active		N/A	
#Company - Approval		N/A	
#Company - Country		N/A	
#Company - Expiry		N/A	
#Company - Record Number		N/A	
#Company - State		N/A	
#Company - Upload Doc		N/A	
#Company - Work Sign Off		N/A	
#Individual - Active		N/A	
#Individual - Approval		N/A	

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

Worker Sign  
Off Required?Site  
Locations  
Selected?

Actions

N/A



N/A



N/A



N/A



N/A



N/A



N/A



✓

N/A



N/A

TIKS Office



✓

N/A

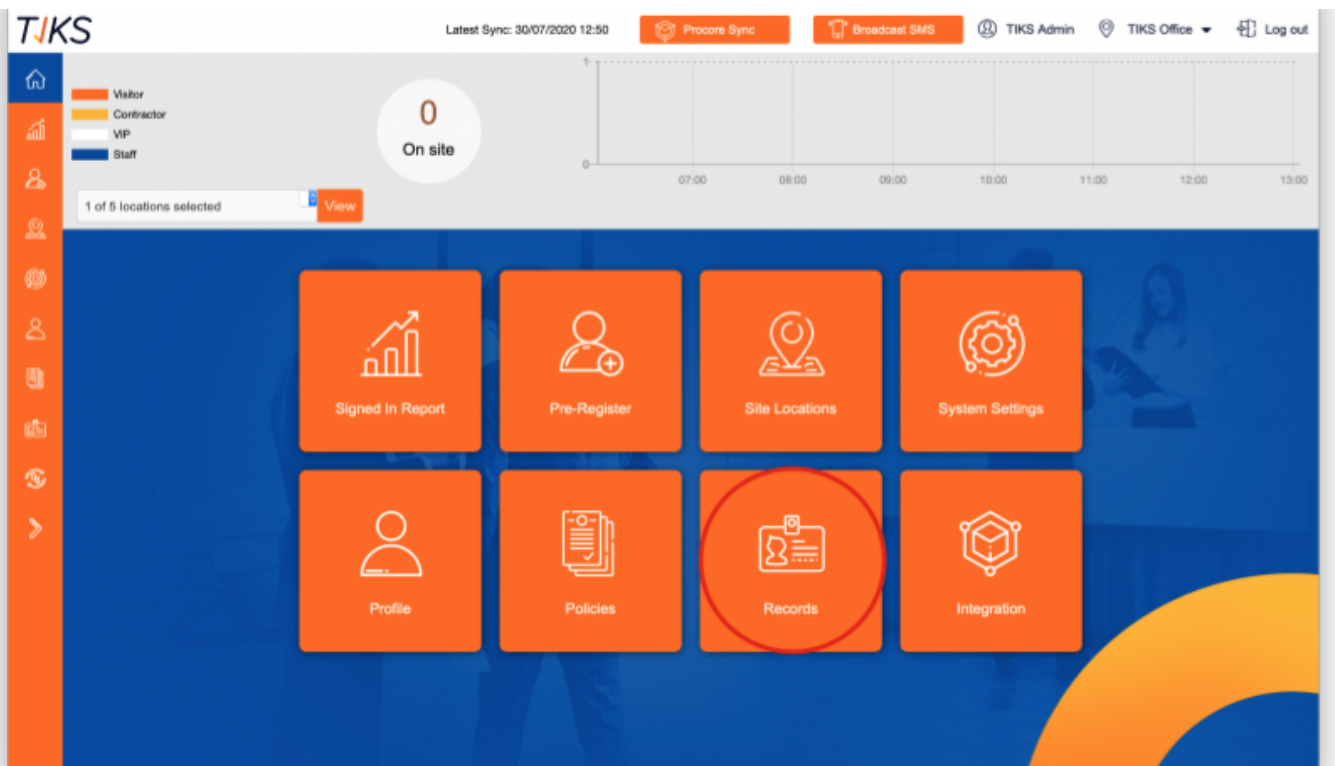
TIKS Office



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

The screenshot shows the TIKS web application interface. At the top, there's a header with the TIKS logo, a sync status 'Latest Sync: 30/07/2020 12:50', and buttons for 'Procure Sync', 'Broadcast SMS', 'TIKS Admin', 'TIKS Office', and 'Log out'. The main content area is titled 'Company List > Record Type List'. A modal window titled 'Add Record Type' is open in the center. It has a 'Name' input field with a red circle containing the number '3' next to it, and a 'Category' dropdown menu. Below these are several checkboxes: 'Mandatory?', 'Document Upload?', 'Expiry Required?', 'Number/ID Required?', 'Country Required?', 'State Required?', 'Approval Required?', and 'Worker Sign Off Required?'. At the bottom right of the modal is a 'Save' button. The background shows a list of record types with columns for 'Record Type', 'Category', 'Mandatory?', 'Document Upload?', 'Expiry Required?', 'Number/ID Required?', 'Country Required?', 'State Required?', 'Approval Required?', 'Worker Sign Off Required?', 'Site Locations Selected?', and 'Actions'.

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

**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

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

Save

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

Please select locations

[Select all]

Milagre Site

TIKS Office

TIKS Test Site

Mand

Document Upload?

Expiry Required?

Number/ID Required?

Country Required?

State Required?

Approval Required?

Save

Filter Results

Work Sign  
Required?

Site  
Locations  
Selected?

Actions

N/A

N/A

N/A

N/A

N/A

N/A

N/A

N/A

TIKS Office

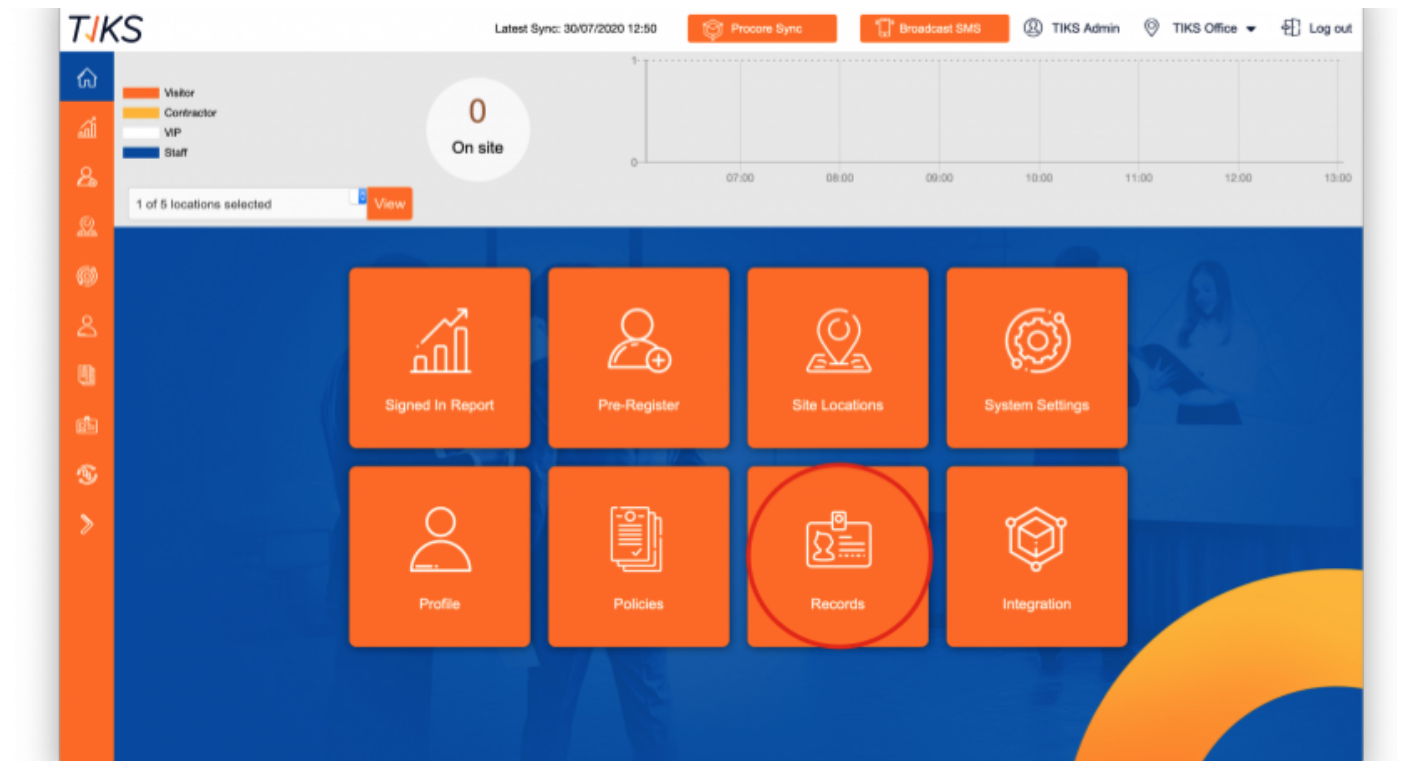
TIKS Office

Total: 26 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.

TIKS

Latest Sync: 30/07/2020 12:50

Procure Sync

Broadcast SMS

TIKS Admin

TIKS Office

Log out

Home

Analytics

Users

Groups

Companies

Locations

Reports

Settings

Help

# 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	<div>View Individuals</div> <div>View Records</div> <div></div>
Company All Valid	admin one	admin@one.com	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div> <div></div>
Company Expired Insurance	No data to display	No data to display	Pending Approval	TIKS Office	<div>View Individuals</div> <div>View Records</div> <div></div>

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

Home

Analytics

Users

Groups

Settings

Reports

Help

Logout

## Companies List

Show entries

10

Company Name

Company Admin

Email

+61

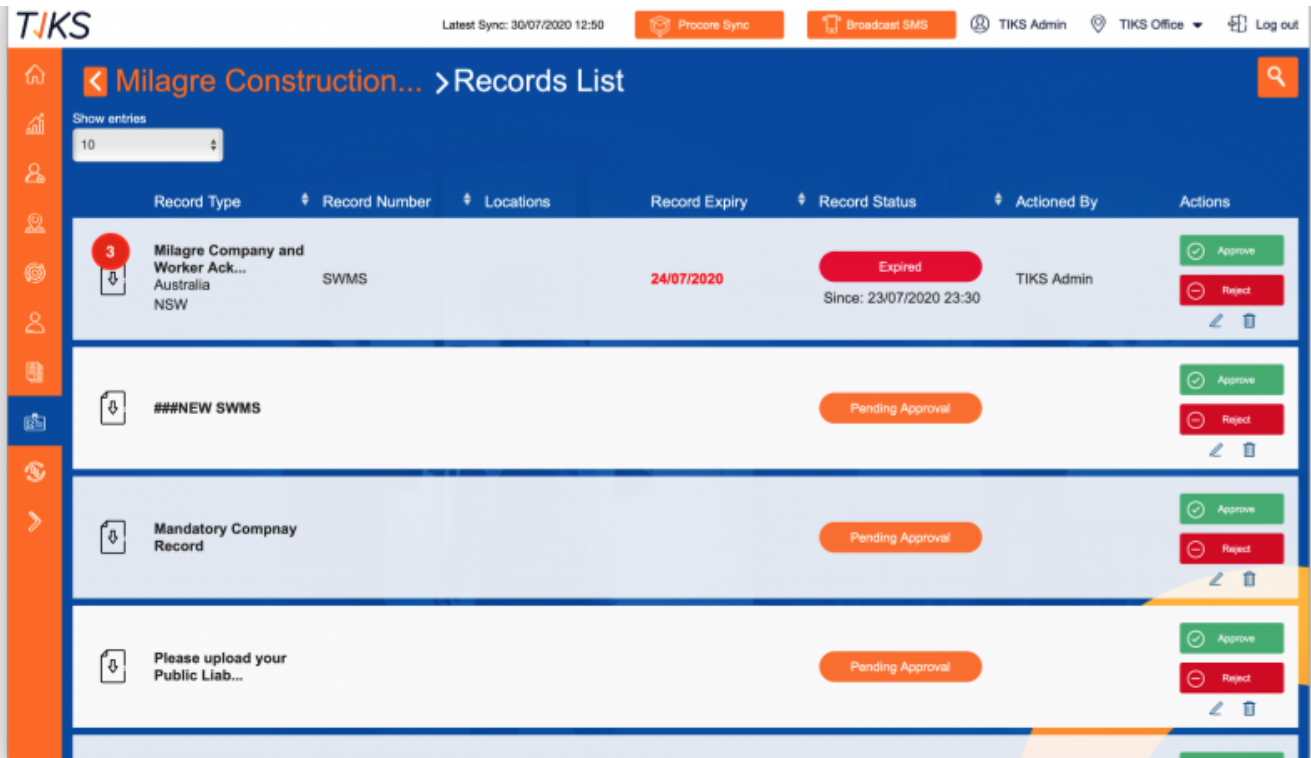
Please select locations

Record Type Settings

Invite Company

Company Name	Company Admin	Email	Company Status	Site Locations	Actions
<a href="#">Client STAFF Company</a>	Client STAFF Member	client@staffmember.com	Pending Approval	TIKS Office	<div><div>View Individuals</div><div>2 View Records</div><div><div></div><div></div></div></div>
<a href="#">Company All Valid</a>	admin one	admin@one.com	Pending Approval	TIKS Office	<div><div>View Individuals</div><div>1 View Records</div><div><div></div><div></div></div></div>
<a href="#">Company Expired Insurance</a>	No data to display	No data to display	Pending Approval	TIKS Office	<div><div>View Individuals</div><div>View Records</div><div><div></div><div></div></div></div>

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



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	<div>4</div> <div> Approve</div> <div> Reject</div> <div> </div>
 ###NEW SWMS				Pending Approval		<div> Approve</div> <div> Reject</div> <div> </div>
 Mandatory Company Record				Pending Approval		<div> Approve</div> <div> Reject</div> <div> </div>
 Please upload your Public Liab...				Pending Approval		<div> Approve</div> <div> Reject</div> <div> </div>

# 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 shows the TIKS web application interface. At the top, the TIKS logo is on the left, and the status 'Latest Sync: 10/08/2020 15:27' is in the center. To the right of the status are buttons for 'Procore Sync', 'Broadcast SMS', and 'TIKS Admin'. Further right is a dropdown menu for 'TIKS Office' and a search icon. A yellow circle with the number 8 is next to the search icon. Below the top bar, the main section is titled 'Site Locations' with a 'Show Archived' toggle. A yellow circle with the number 1 is next to the 'Show Archived' toggle. On the left side of the main section is a vertical sidebar with icons for home, site locations, users, and other functions. A yellow circle with the number 2 is next to the 'Site Locations' icon. The main content area is divided into two rows. The first row is for the 'Current Site', which is 'TIKS Office' at '1 Kings Cross Road, Darlinghurst, . . . AU'. It shows a map (yellow circle 2), the name (yellow circle 3), a QR code (yellow circle 4), configurations (yellow circle 5), and actions (yellow circle 6). The configurations list includes 'Record Administrators', 'Induction (12 Months)', 'Print', 'Email', 'Photo', 'Active Site Location', and 'Date Format (DD/MM/YYYY)'. The actions list includes 'Inductions' and 'Out Of Hours'. The second row is for 'Site Locations', which shows a list of other sites, including 'Milagre Site' at '63 Warraba Street'. It also shows a map, name, QR code, configurations, and actions. A yellow circle with the number 7 is next to the 'Add Site' button in the top right corner.

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.