

TIKS VMS Records User Guide

This user guide covers the basic functions of the Records module within TIKS VMS.

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 - [How to onboard Individual Workers \(no Procore integration\)](#)
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How to set up a Contractor Company and Individual Workers

How you onboard a new Contractor Company (no Procore integration)

Inviting a new Contracting Company (no Procore)

The instructions below are to manually invite a contracting company to onboard. When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS Records. However, you will have to manually invite an Administrator for each of the synced companies from Procore.

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

Next, to invite a **Contracting Company** you will need to fill in the following fields:

Step 1: Add the Company name

Step 2: Add the Company Admin user's Full Name

Step 3: Add their admin user's email address

Step 4: Add their admin user's mobile number

Step 5: Select which active sites this Company can work on.

Now tap on the "Invite Company" to finalise the registration. The Admin user for this account will now be notified by email.

Companies List

Download Report

Filter Results



Show entries

10

Test Company 1 Sam Marclano 2 sam@test@tik.com.au 3 +61 - 0421969482 4

1 of 3 locations selected

- [Select all]
- Miagre 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 ⏪ 🗑

How to onboard Individual Workers (no Procore integration)

The instructions below are to manually invite an Individual Worker to onboard.

When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS as will any users under those companies. However, you will have to manually select an Administrator for each of the synced users from Procore by editing their Role (Pencil icon).

1. Log into the admin portal
2. Tap on the "Records" button
3. Tap on the Contracting Company you want to invite Individual Workers from

Next, to invite an Individual Worker you will need to fill in the following fields:

Step 1: Add the user's Full Name

Step 2: Add their email address

Step 3: Add their mobile number

Step 4: Select which active sites this users can work on.

Now tap on the "Invite Individual" button to finalise the registration. The Admin user for this account will now be notified by email.

How to onboard a new Contractor Company (with Procore integration)

When TIKS is integrated with Procore, all companies in that project's Directory will come across to TIKS under the Records tile.

Due to the integration, Contractors Companies MUST be invited to your project in Procore first. Once the new company is added, it will be synced and appear in TIKS under the Records tile.

Contractor Companies cannot be added directly into TIKS when Procore integration is turned on.

How to onboard Individual Workers (with Procore integration)

When TIKS is integrated with Procore, all companies in that project's Directory will come across to TIKS under the Records tile. In addition, all users under those companies in the Directory will also be brought across to TIKS under their relevant companies.

Due to the integration, Contractors Companies MUST be invited to your project in Procore first. Once the new company is added, it will be synced and appear in TIKS under the Records tile. However, Individual Workers may be [added manually directly into TIKS](#), as users on Procore may not necessarily attend site to perform work.

When Individual Workers are added under Contractor Companies, their time on site will also be tallied up and added to Site Diary/Manpower on Procore. The Individual Worker's profile created in TIKS will not be shown on Procore.

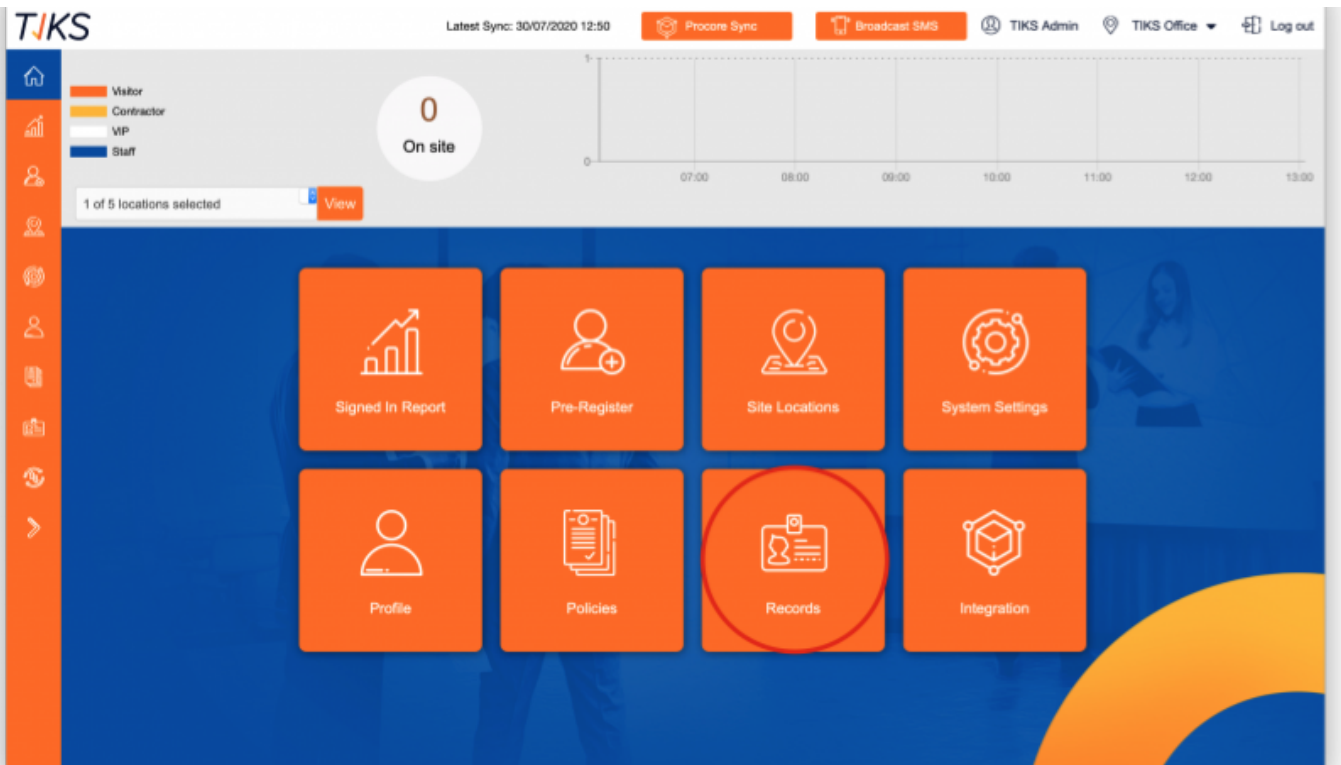
Contractor Companies cannot be added directly into TIKS when Procore integration is turned on.

How to Set Up and Approve Requirements on Records

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"

The screenshot shows the TIKS web application interface. At the top, there is a navigation bar with the TIKS logo, a sync status indicator (Latest Sync: 30/07/2020 12:50), and buttons for 'Process Sync', 'Broadcast SMS', 'TIKS Admin', 'TIKS Office', and 'Log out'. Below the navigation bar is a 'Companies List' section with a 'Download Report' button, a 'Filter Results' button, and a search icon. A 'Show entries' dropdown is set to '10'. The main content area features a form for adding a company with fields for 'Test Company', 'Sam Marciano', 'sam+test@tiks.com.au', and '+61 0421969482'. A dropdown menu is open, showing '1 of 3 locations selected' with options: '[Select all]', 'Mitagre Site', 'TIKS Office' (selected), and 'TIKS Test Site'. Below the form is a table with columns: 'Company', 'Company Admin', 'Email', 'Company Status', 'Site Locations', and 'Actions'. The table contains three rows: 'Client STAFF Company' (Client STAFF Member, client@staffmember.com, Pending Approval, TIKS Office), 'Company Expired Insurance' (No data to display, No data to display, Pending Approval, TIKS Office), and 'Company No Insurance' (No data to display, No data to display, Pending Approval, TIKS Office). Each row has 'View Individuals' and 'View Records' buttons. A red notification bubble with the number '1' is visible next to the 'View Individuals' button for the first row.

Step 2: Tap on the "Add Records Type"

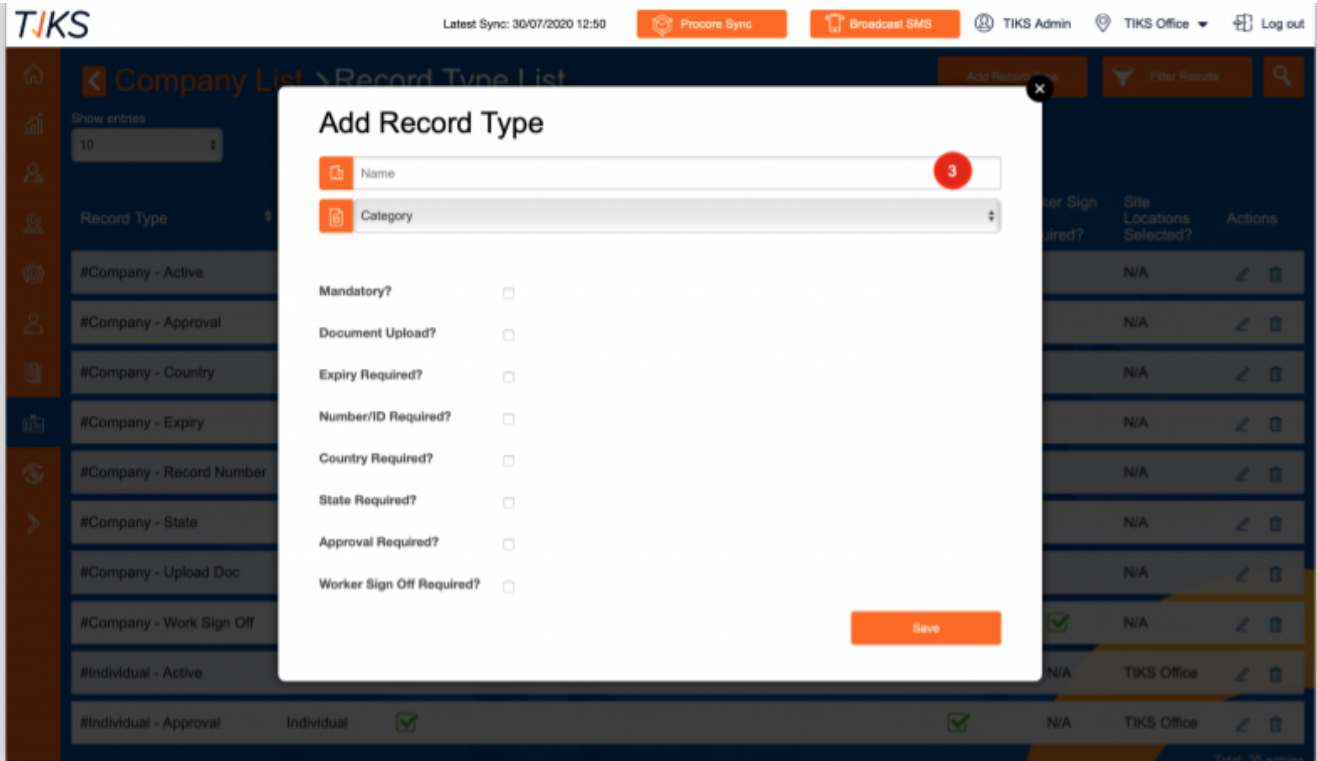
Company List > Record Type List

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	✎ 🗑
#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?

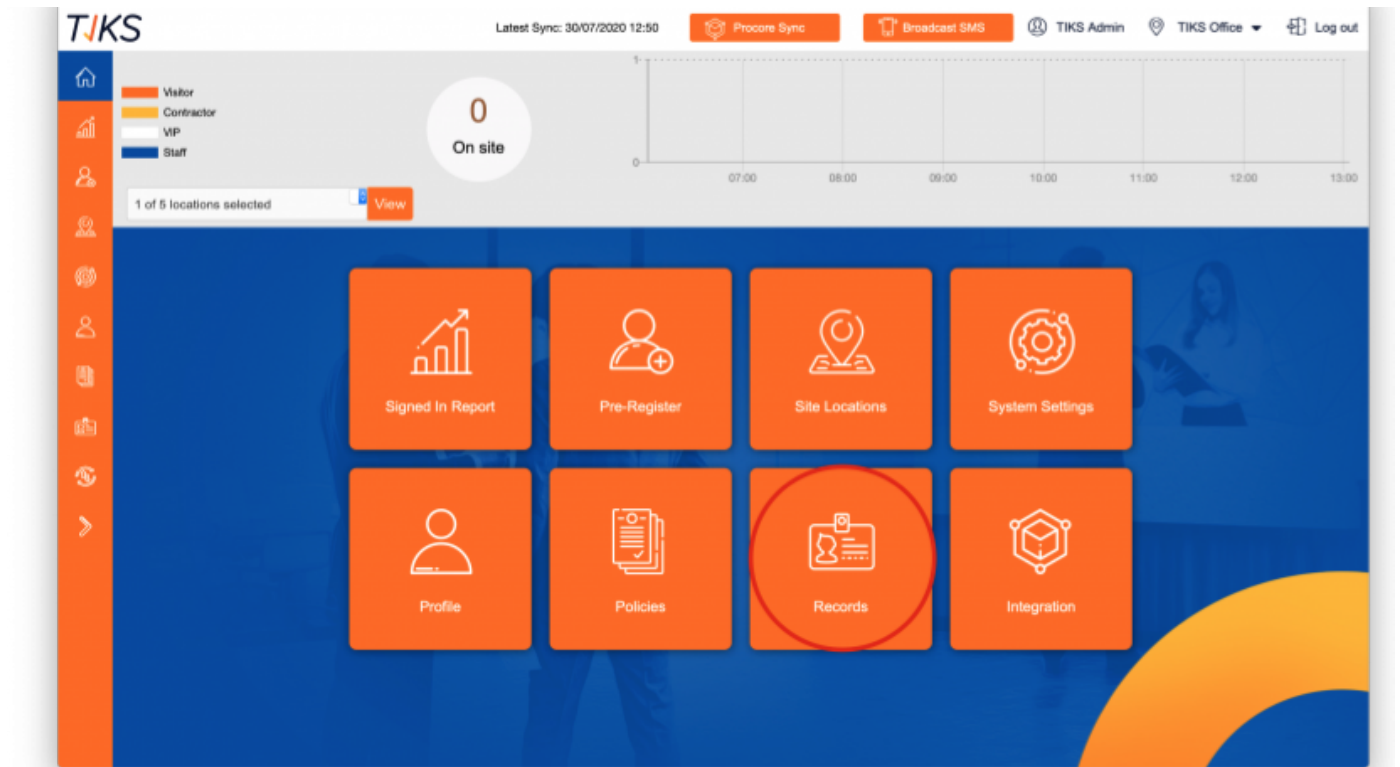
Save

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"

TIKS Latest Sync: 30/07/2020 12:50 Procure 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	View Individuals 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"

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

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	✎ 🗑
#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"

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 record types with columns for 'Record Type', 'Status', '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

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 5
- TIKS Test Site

Mand

Document Upload?

Expiry Required?

Number/ID Required?

Country Required?

State Required?

Approval Required?

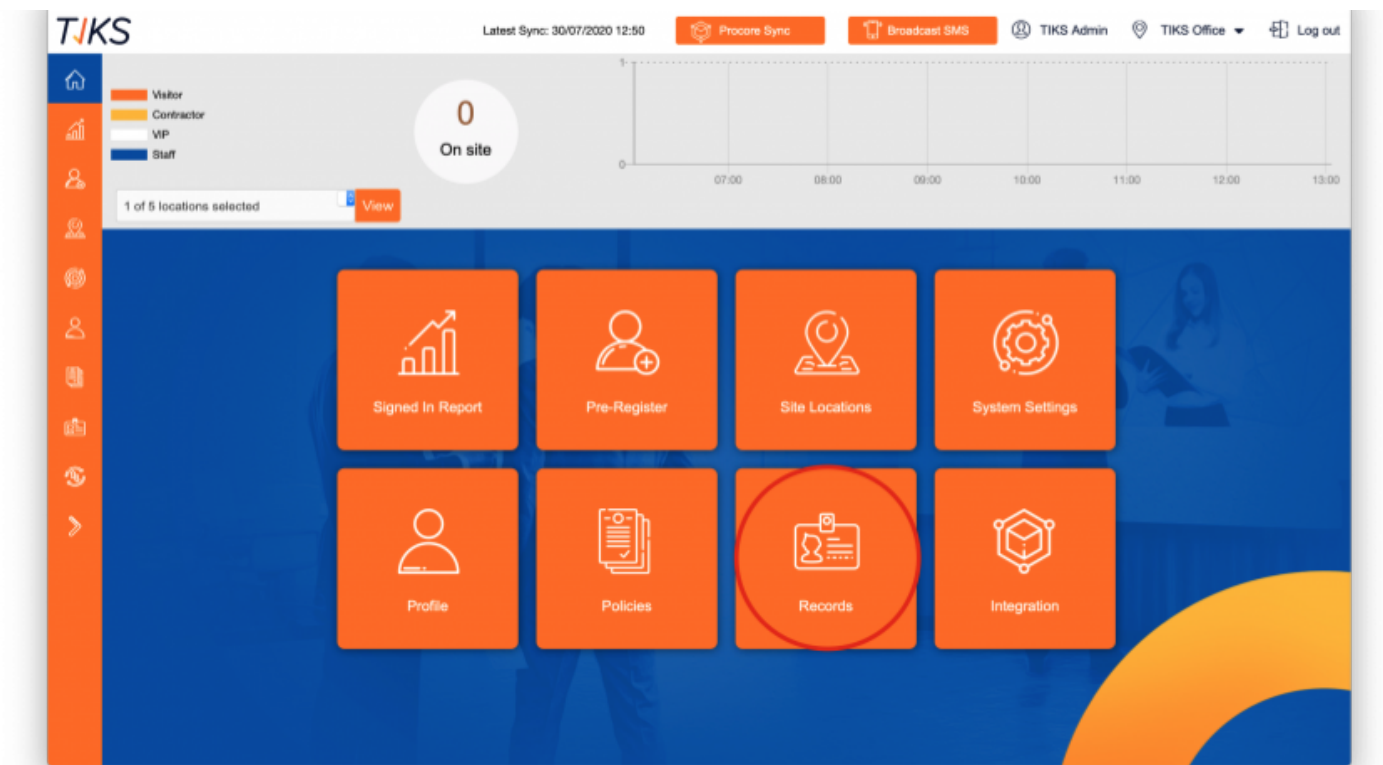
Save

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

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

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

The screenshot shows a mobile application interface for TIKS. At the top, there is a navigation bar with the TIKS logo, a sync status, and several utility buttons. Below this is a header for the 'Records List' for 'Milagre Construction...'. A search icon is in the top right. A 'Show entries' dropdown is set to '10'. The main content is a table with columns: Record Type, Record Number, Locations, Record Expiry, Record Status, Actioned By, and Actions. The first record is 'Milagre Company and Worker Ack...' with a status of 'Expired' and an expiry date of '24/07/2020'. The other three records have a status of 'Pending Approval'. Each record has 'Approve' and 'Reject' buttons in the Actions column.

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.



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.

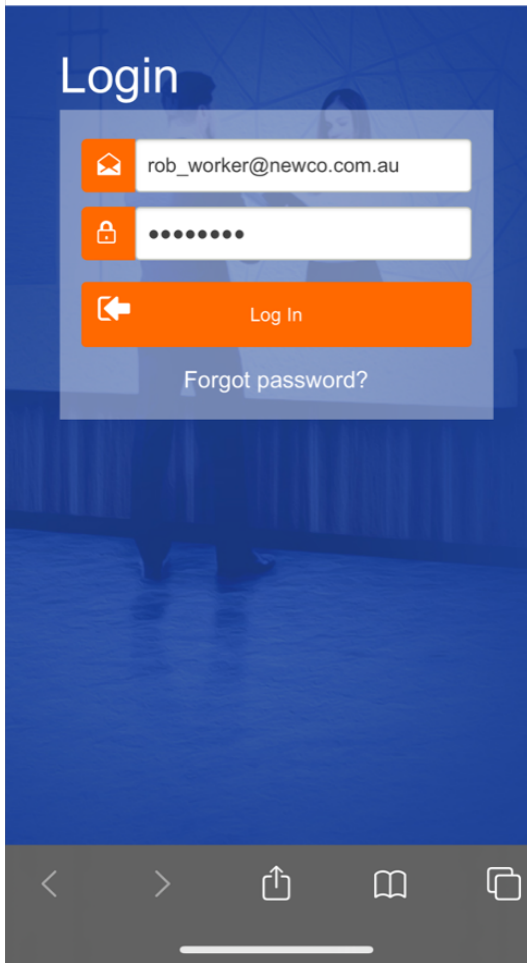
How to Become Approved

Steps to Becoming Approved

1. As an Individual Worker (known as Individual in the system), **you will receive a welcome email** advising you of your username and temporary password. The email sender is no-reply@tiks.com.au . If you cannot find the email in your **Inbox, please check your Junk Mail** folders, as your email provider may not recognise the sender.

Use the 'Click here' **link from the email** that takes you to the online Portal.

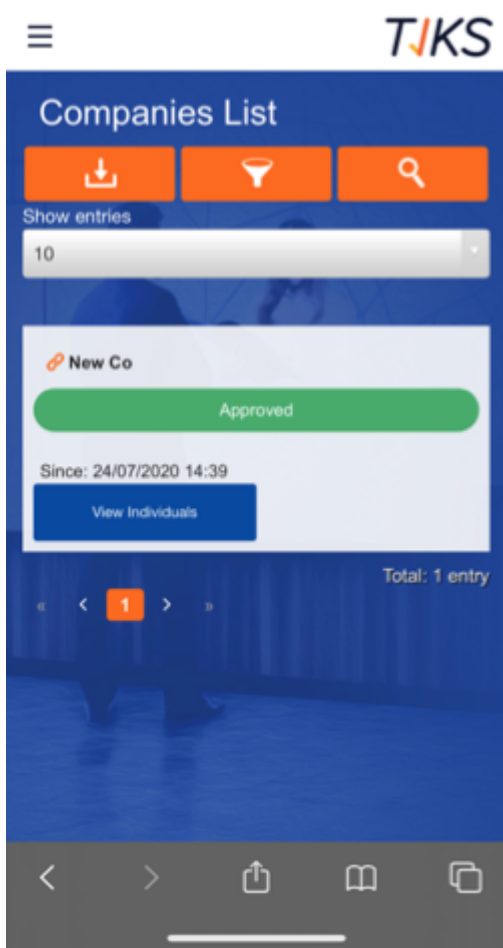
2. This is the login page for the online Portal. Use the **username and password** from the welcome email to login to the online Portal.



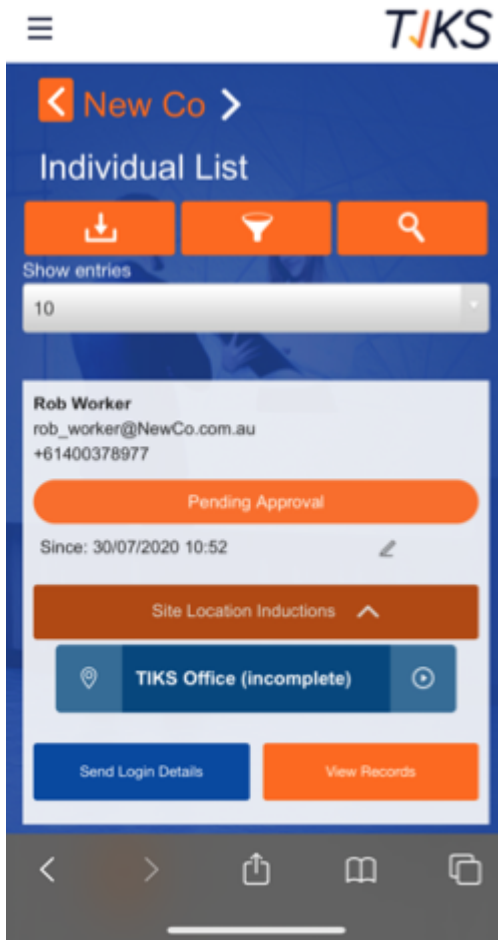
3. Once you have logged in, you will see the screen below with 2 tiles: Profile and Records. To complete your requirements and **submit your records for approval**, tap on **Records**. Tap on **Profile** if you would like to **change your password** from the one provided in the email.



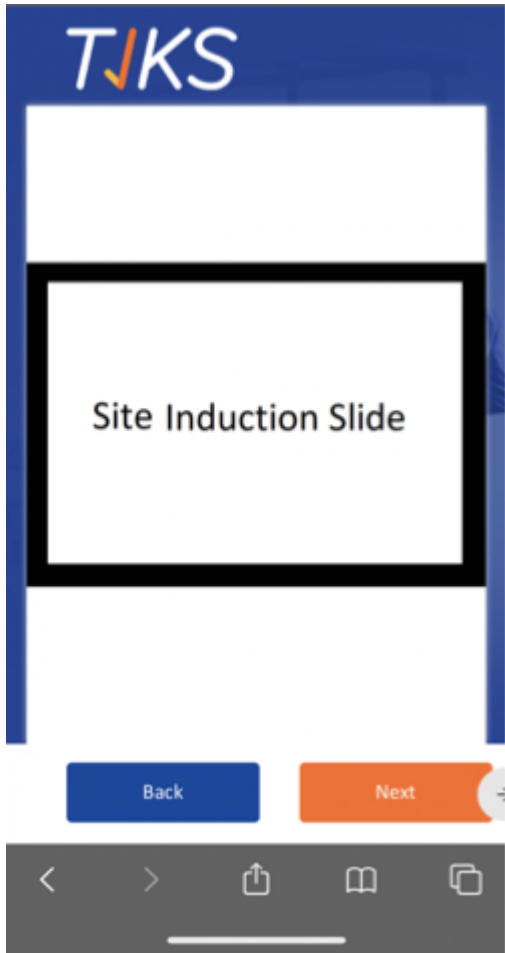
4. You will be shown your company's status, in this example New Co is Approved. Tap on **View Individuals** to see your status. If you are a **Company Administrator**, you will have a View Records button next to View Individuals; tap in View Records and go to **step 7** below to **complete your company's records**.



5. You will be shown your individual status, in this example Rob Worker is Pending Approval. You **may have** to complete an online induction, depending on the site requirements. Tap on **Site Locations Induction** to see your inductions. Tap on the **little arrow** on the right-hand side of the blue **rectangle to play the induction** (in this example, TIKS Office).



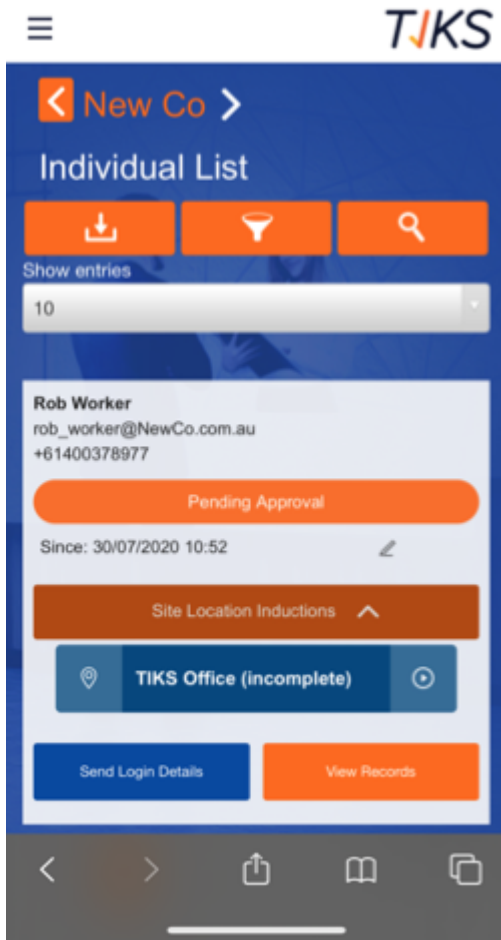
Once you tap on the Induction tile, the induction will play. You will need to watch the induction to the end of the presentation, by **tapping on Next** until you get to the end where you will be shown an **Accept** button.



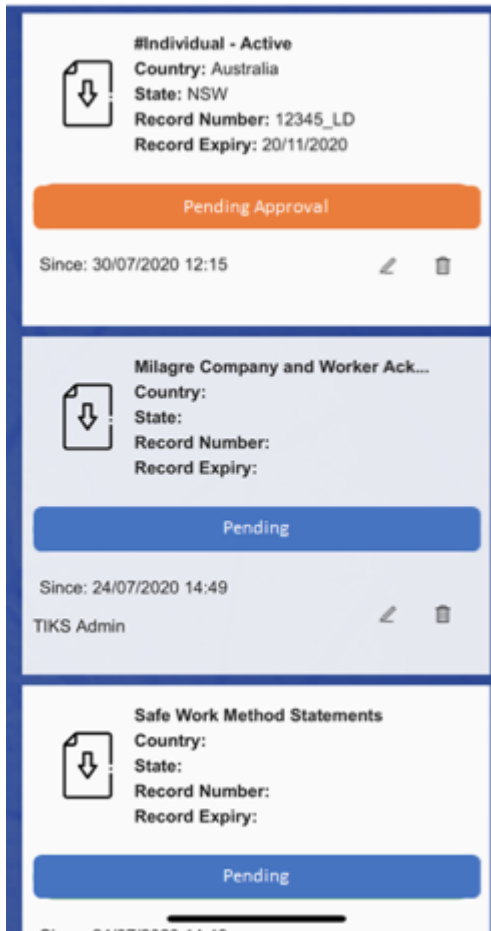
You **may** also be asked to review and acknowledge a **policy**. If this is required, the screen below will be shown immediately after you complete your induction. Tap on **Acknowledge** once completed.



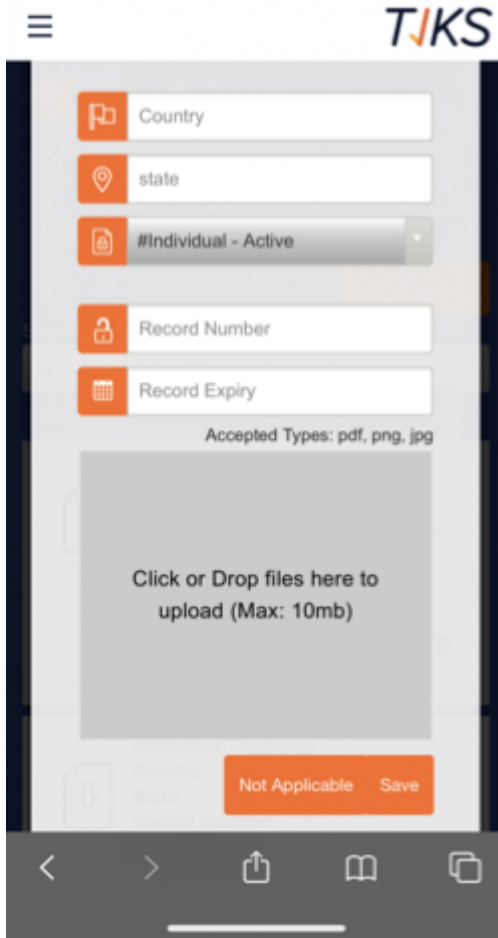
6. You will be taken back to the screen below, once you complete your induction and policies. Tap on **View Records** to complete your records.



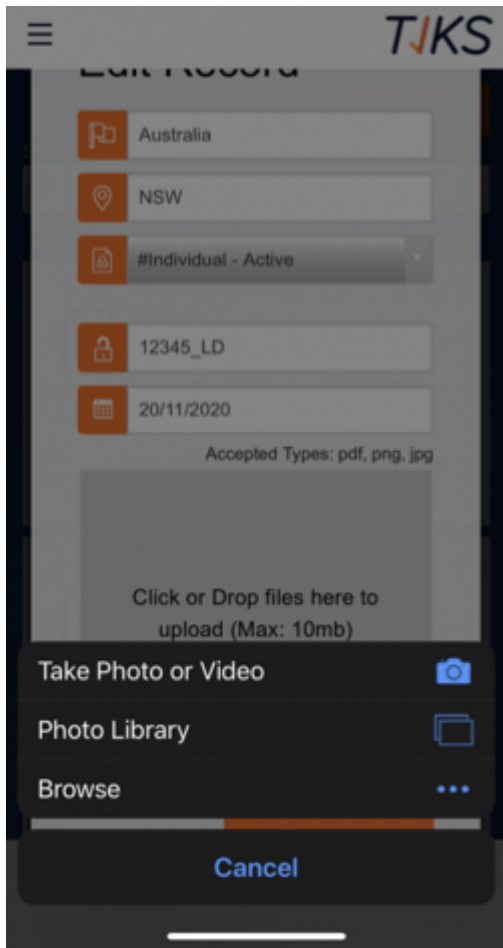
7. Once you tap on View Records on the previous screen, you will be shown the **records** you need to **complete and submit for approval**. The example below shows 3 records: one record is Pending Approval (it has been completed and submitted for approval, but not yet approved) and two records are **Pending** (they have not been completed yet). Once records are completed and approved by Admin, they will turn **Approved** (green).



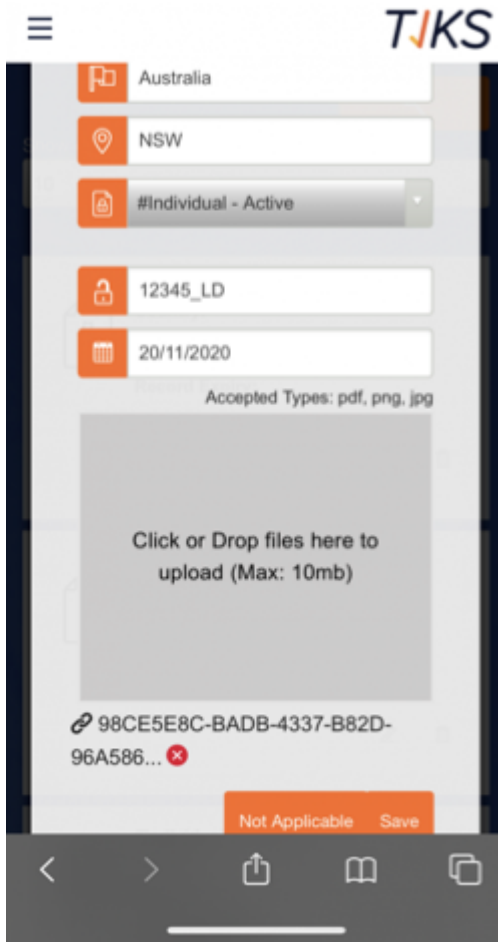
8. To **complete** a record, tap on the **Pencil Icon**, which will open the form below for you to fill out. You will need to **fill out all fields shown in the form**, and sometimes you will need to **provide evidence** in the form of an **attachment**.



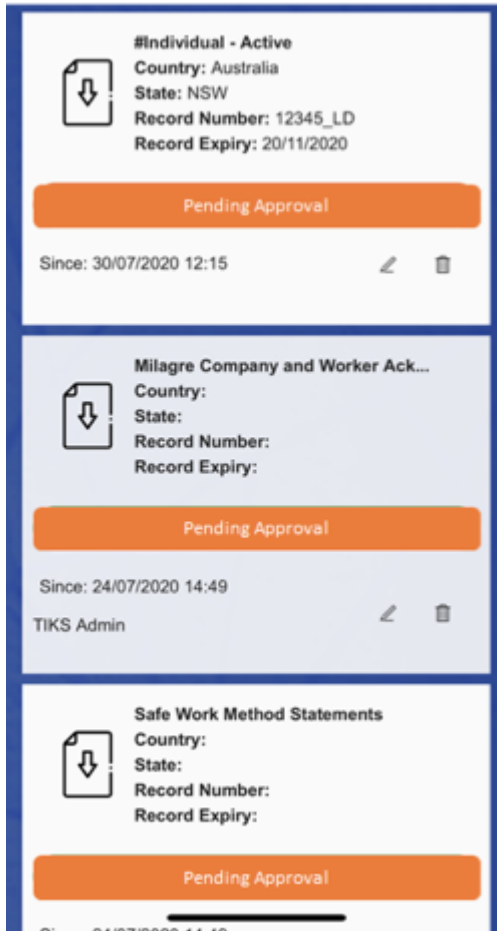
If you are completing your records from a mobile device, you will be able to add **evidence from your photo library**, take a **new photo** directly or **browse your files** to find the correct **attachment** as shown below.



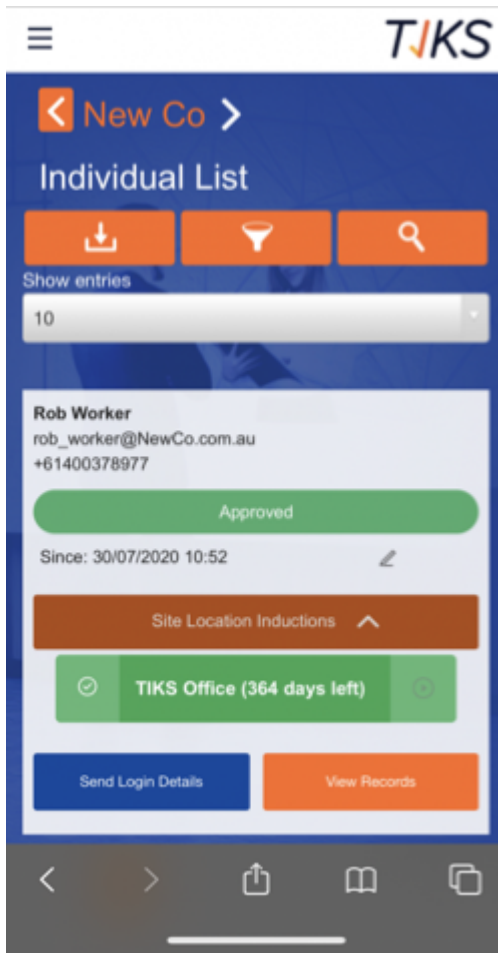
Once you have completed the form and attached your evidence, you will need to hit **Save to submit** the record for approval. If you believe **this requirement does not apply to you** (for example, you don't need a licence to perform your trade), you may select **Not Applicable** without filling out the form.



9. Once you have completed each record on your list, all your records will be in **Pending Approval** status until **approved** by Admin.



10. Once all of your **records have been approved**, your overall status to access your company site will be **Approved (green)** as shown below. If you are required to complete an online induction, you **must also compete your induction** before you come to site.



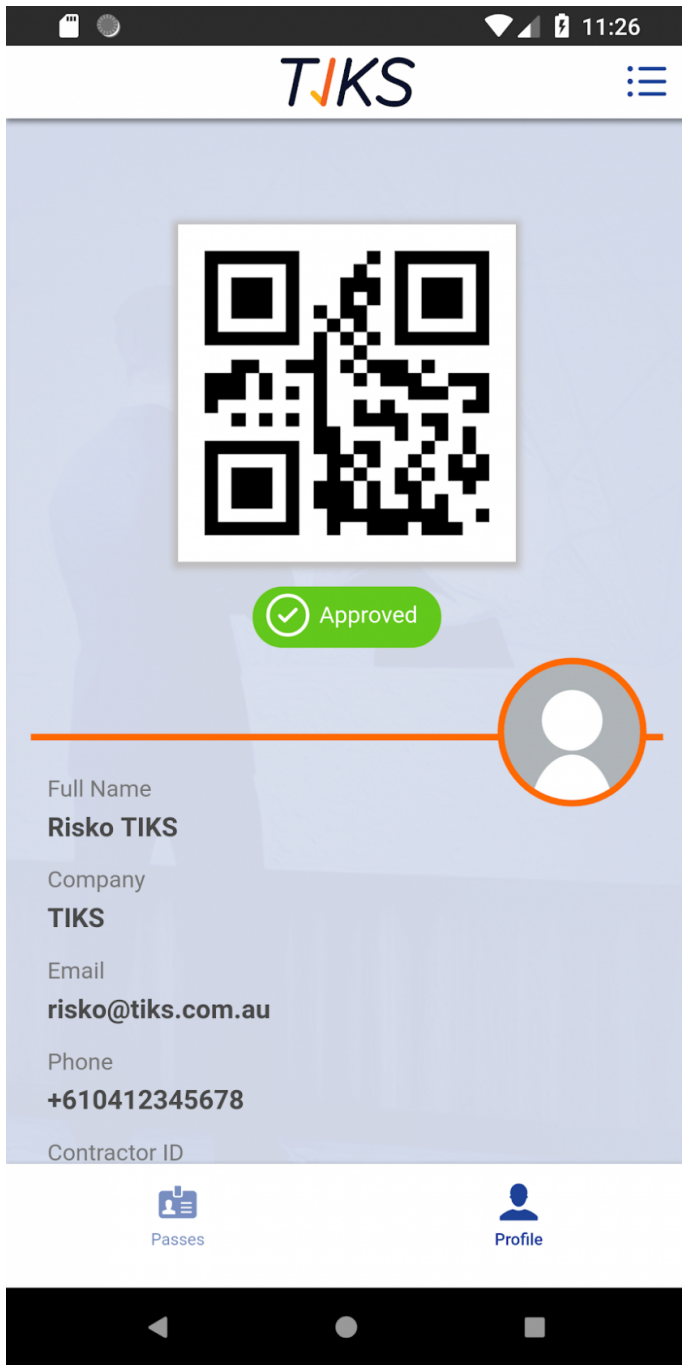
In addition, you are now able to use the **Visitor app to gain access to site**, by scanning the QR code from your app Profile via the turnstile.

How to Use the Visitor App

Downloading and Launching the App

The Visitor App will only be useful to you, once you have been approved as an Individual AND your company has also been approved. See the [How to Become Approved](#) chapter for details on becoming approved to access site.

1. Go to the [Apple App Store](#) (iPhones) or [Google Play Store](#) (Android) and search for **Company Visitor**. The App icon is shown below.
2. **Download the App** to your mobile device.
3. Once you have been **approved**, you will receive **an email** titled **Successful Contractor Registration**. Please follow the instructions in the email to launch the app, by tapping on the Click Here to launch the app tile within the email. See example email below.
4. Once you tap on that tile, the app will **launch and log you in**.



5. You are now **ready to use** the QR code from your app Profile to access site, by **scanning it via the turnstile**. This will **sign you into site**, and the appropriate staff member will be alerted of your arrival. At the end of your work day, scanning your QR code via the turnstile will **sign you out of site**.