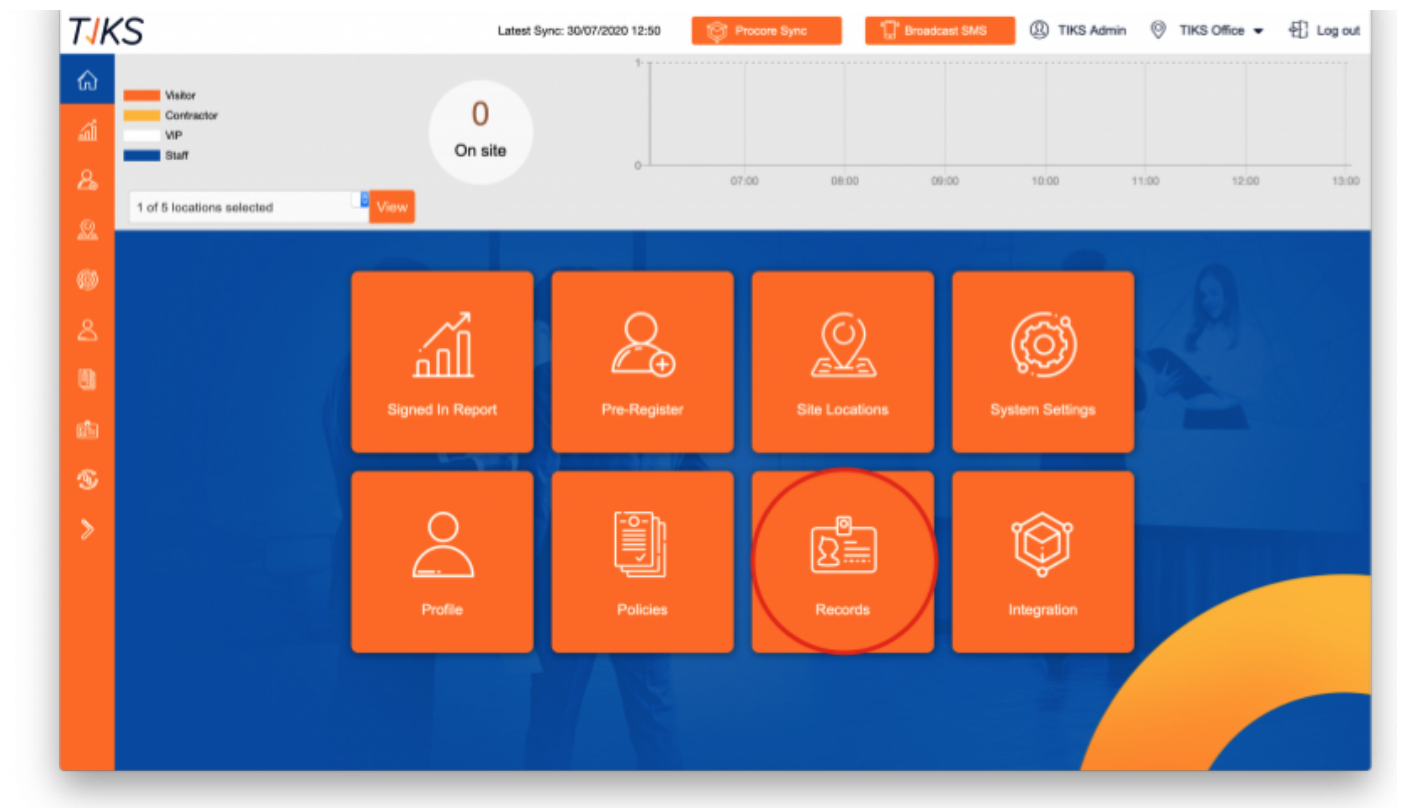


How to Set Up Records for Individual Workers

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

Download Report Filter Results

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 | <input checked="" type="checkbox"/> | | | | | | | | N/A | Edit Delete |
| #Company - Approval | Company | <input checked="" type="checkbox"/> | | | | | | <input checked="" type="checkbox"/> | | N/A | Edit Delete |
| #Company - Country | Company | <input checked="" type="checkbox"/> | | | | <input checked="" type="checkbox"/> | | | | N/A | Edit Delete |
| #Company - Expiry | Company | <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | | | | | | N/A | Edit Delete |
| #Company - Record Number | Company | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> | | | | | N/A | Edit Delete |
| #Company - State | Company | <input checked="" type="checkbox"/> | | | | | <input checked="" type="checkbox"/> | | | N/A | Edit Delete |
| #Company - Upload Doc | Company | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | | N/A | Edit Delete |
| #Company - Work Sign Off | Company | <input checked="" type="checkbox"/> | | | | | | | <input checked="" type="checkbox"/> | N/A | Edit Delete |
| #Individual - Active | Individual | <input checked="" type="checkbox"/> | | | | | | | 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

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 two input fields: 'Name' (with a red circle containing the number 3 next to it) and 'Category'. Below these fields are several checkboxes: 'Mandatory?', 'Document Upload?', 'Expiry Required?', 'Number/ID Required?', 'Country Required?', 'State Required?', 'Approval Required?', and 'Worker Sign Off Required?'. A red 'Save' button is at the bottom right of the modal. In the background, a table of record types is visible, with columns for 'Record Type', 'Status', 'Category', 'Worker Sign Off', '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

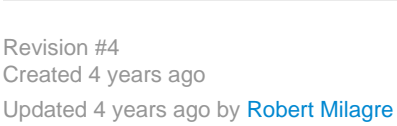
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

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.**



Created 4 years ago

Updated 4 years ago by [Robert Milagre](#)