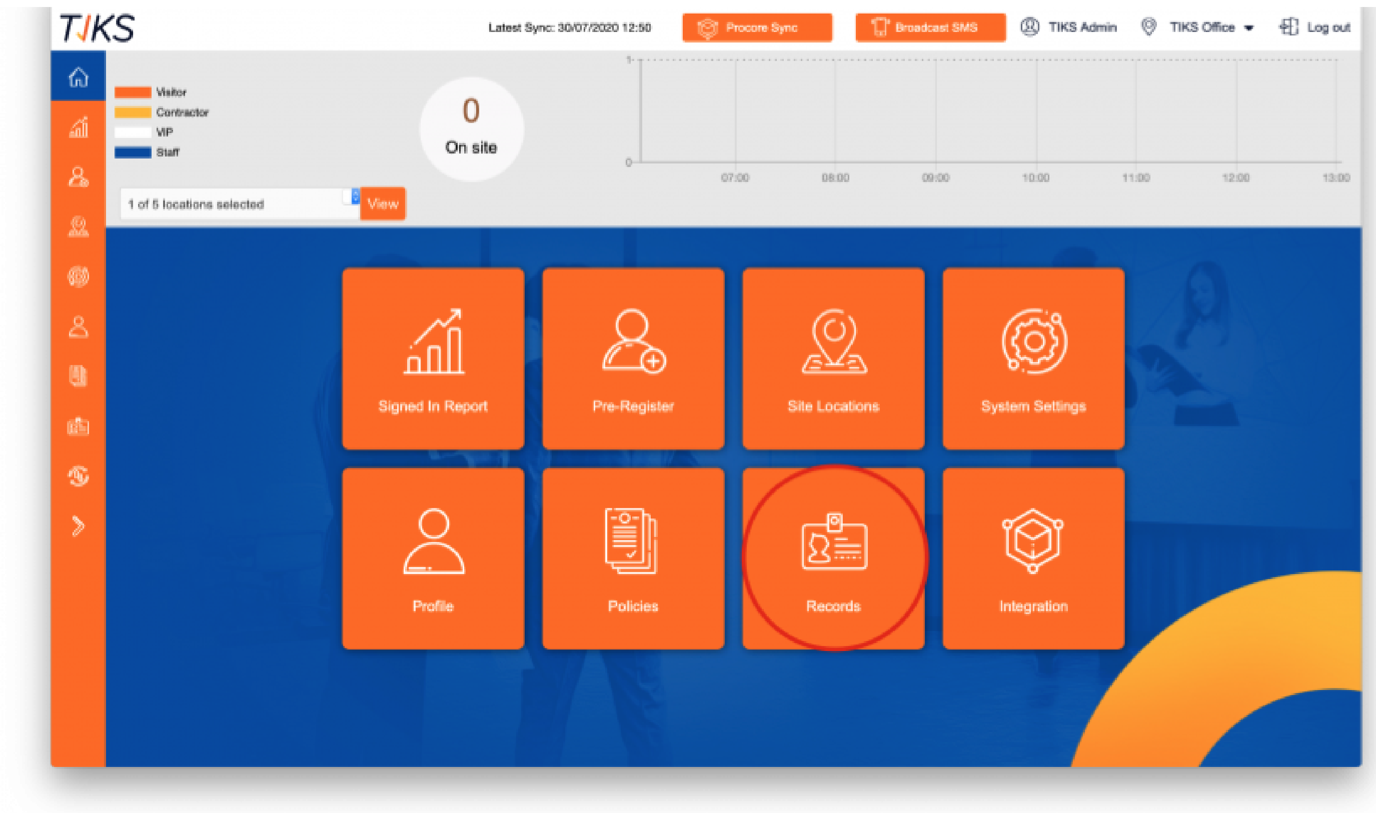
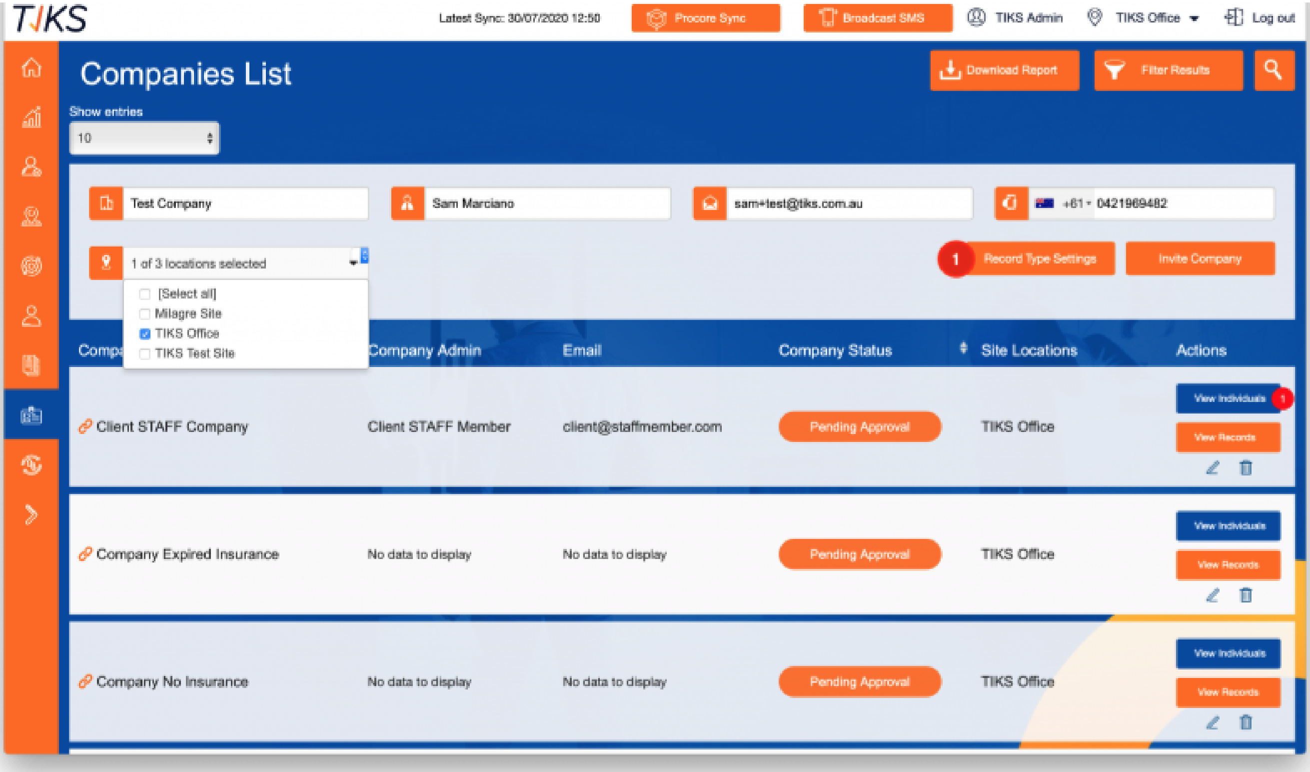
How to Set Up Records for Individual Workers

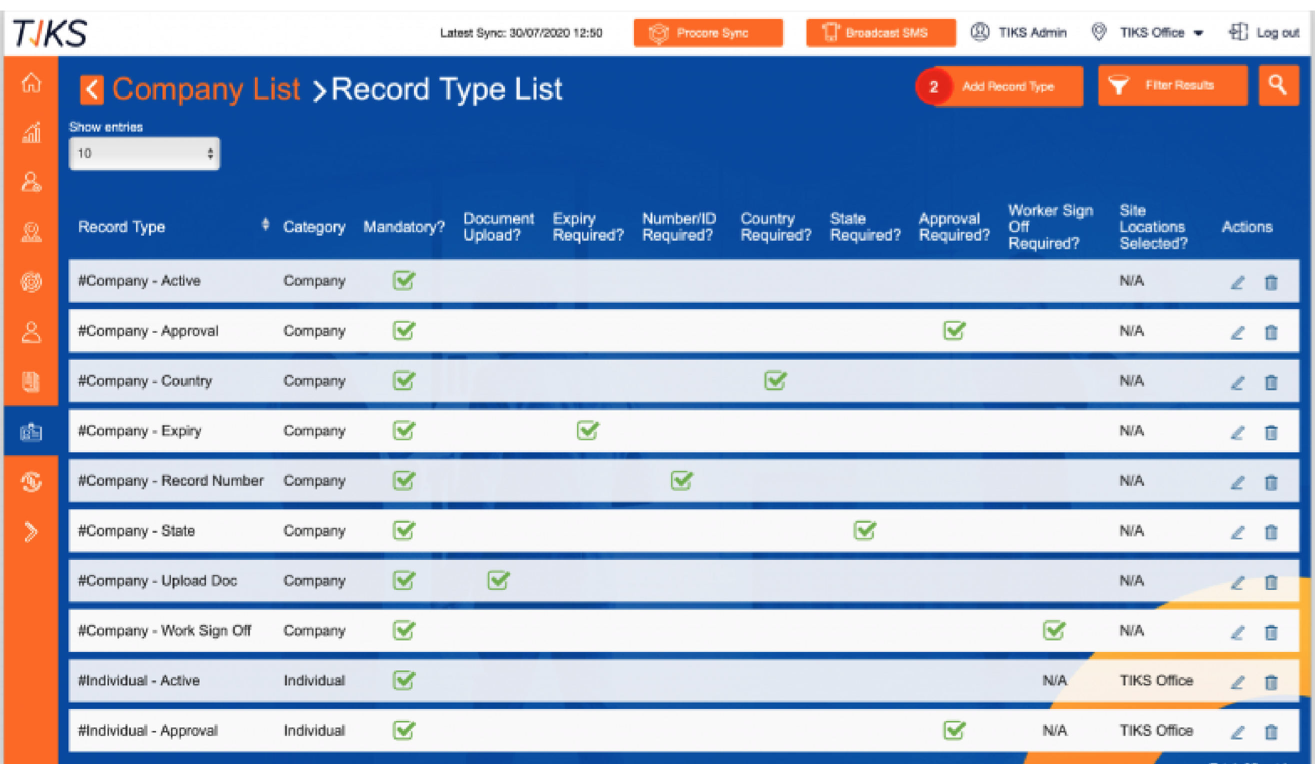
1. Log into the admin portal
2. Tap on the "Records" button



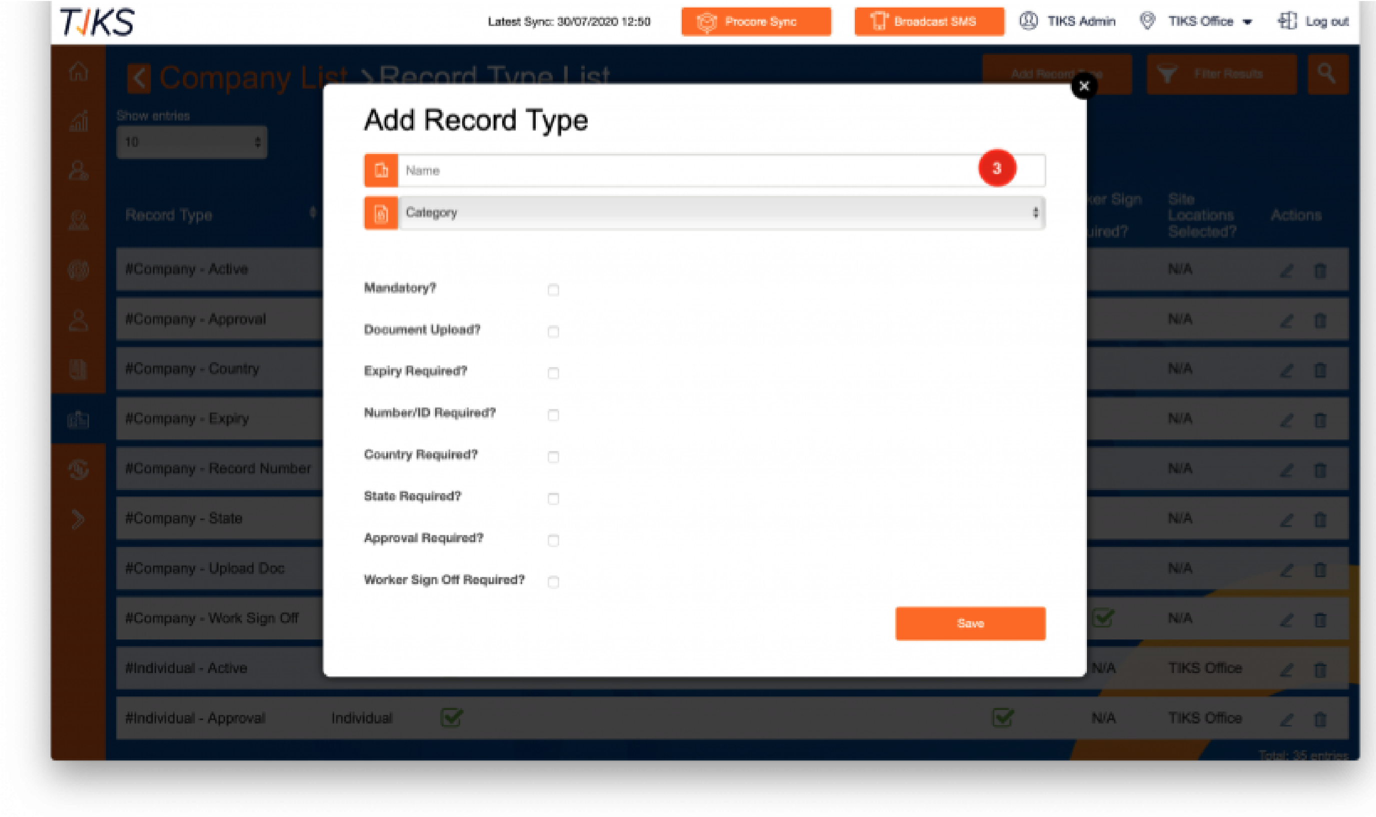
Step 1: Tap on the "Records Type Settings"



Step 2: Tap on the "Add Records Type"



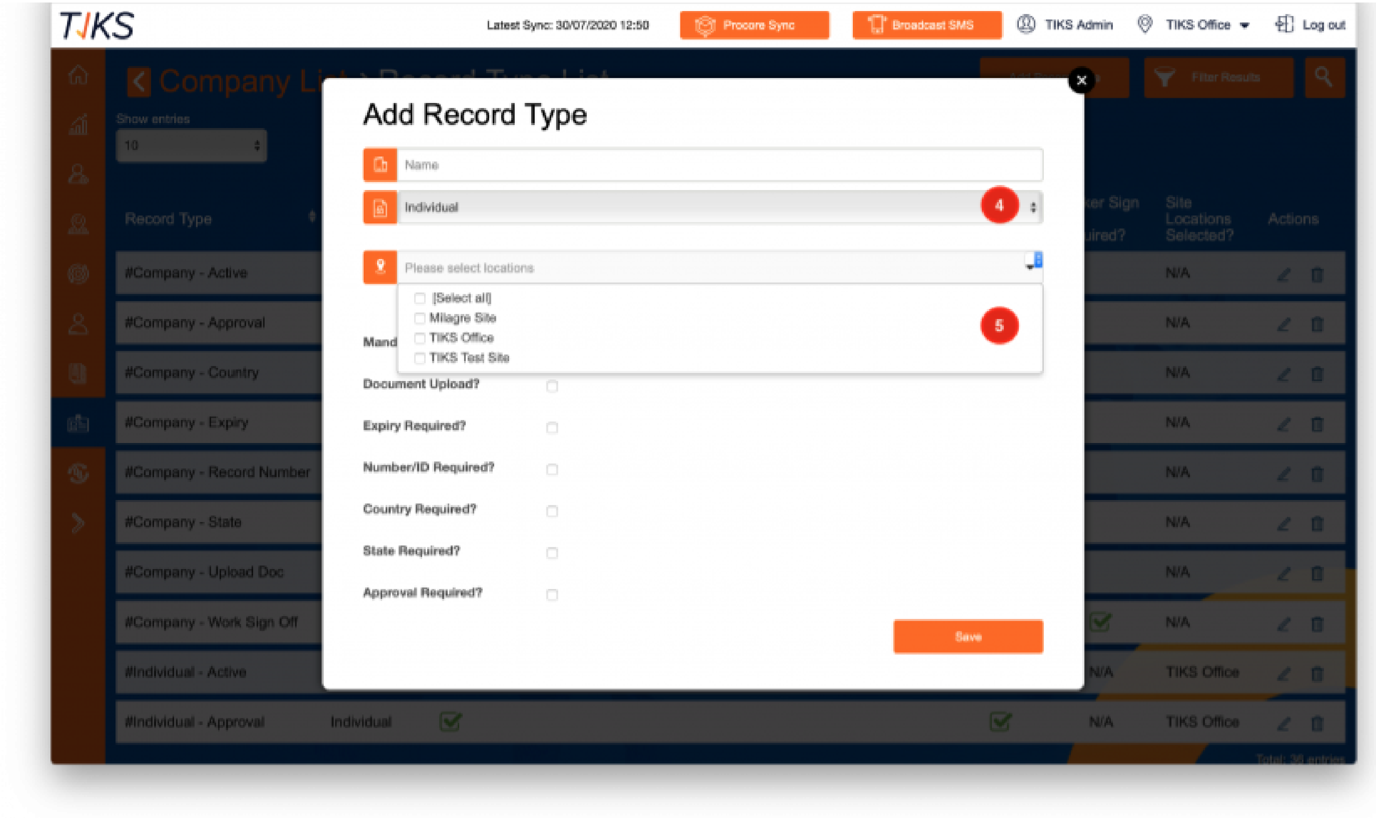
Step 3: Give this record a Name/title ie: "Safe Work Method Statements"



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**.



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