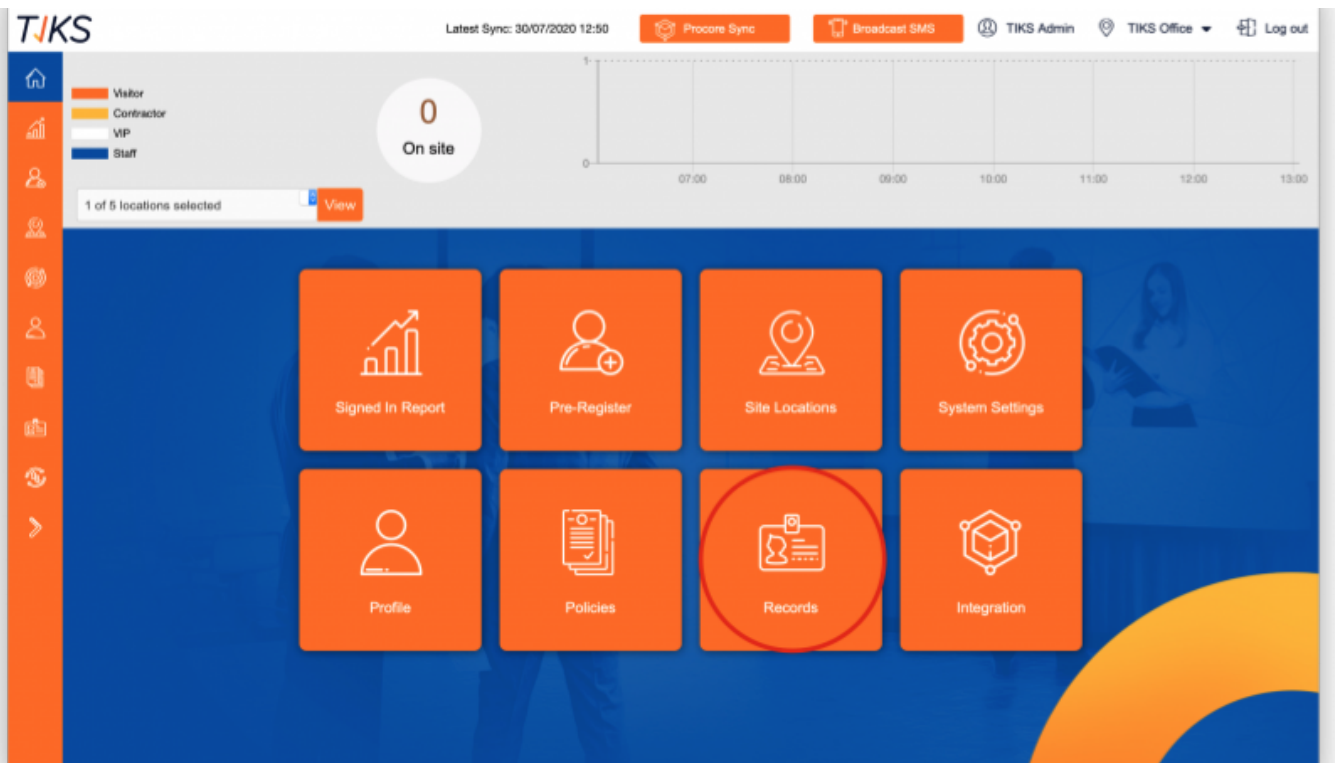


How to Set Up Records for Individual Workers

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?'. At the bottom right of the modal is a 'Save' button. The background shows a list of record types 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

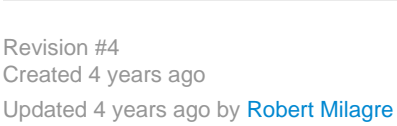
Number/ID Required: Select this if you require to capture the record number, an example may be the Policy Number or Licence number

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](#)