VMS + Records Update

Records Update in VMS Portal

Records Before Update

Why has there been an update?

There has been an update in our VMS platform in the records section, you no longer can invite a company.

Due to Procore integration, all companies on records must come from the sync with Procore. We have added a pop-up alert when clicking on 'invite company' as a reminder and also to provide you with instructions.

How do I know about this update?

The instructions below are outlining the new records update in our VMS platform, now the control of manually inviting a company to onboard has been disabled. This is due to the Procore Integration and now all companies on records must firstly sync with Procore.
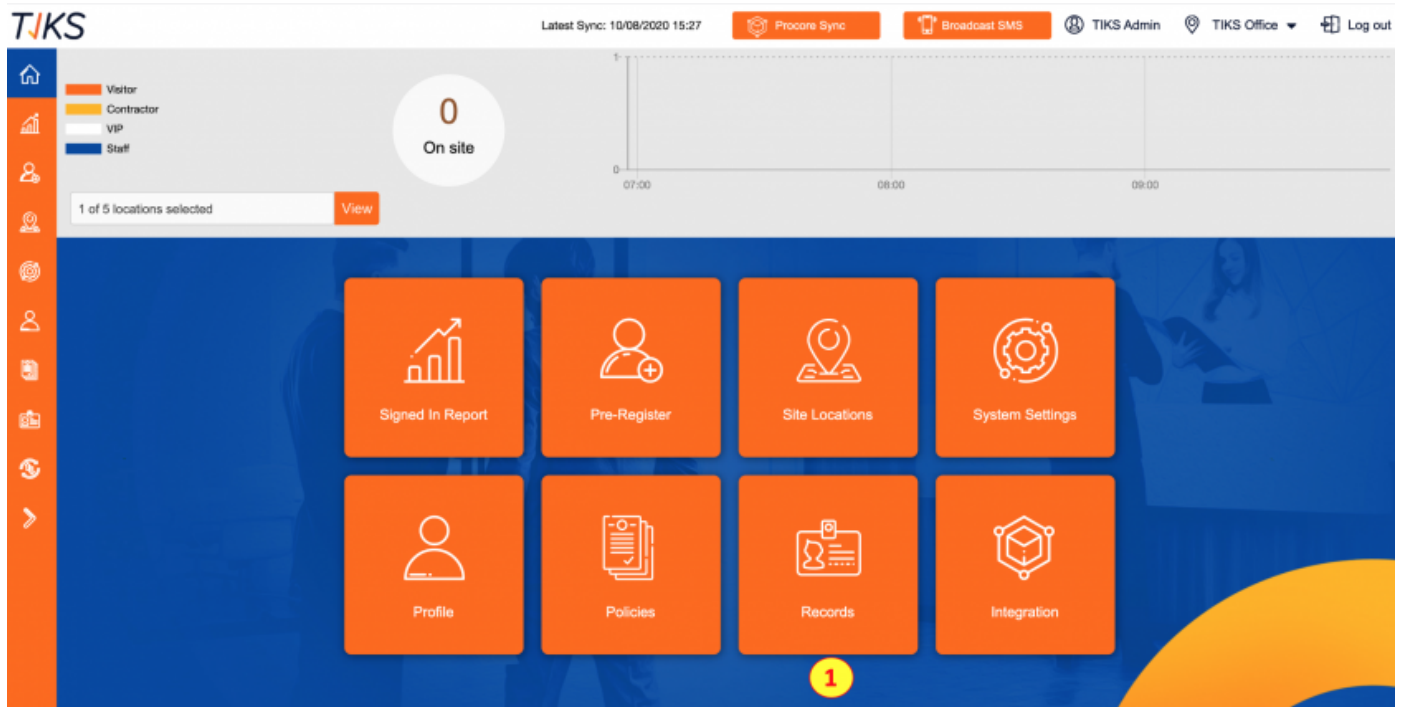
When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS Records. However, you will have to manually invite an Administrator for each of the synced companies from Procore.

What has changed due to the records update?

Previously, Worksite Admin Managers could invite a company in the records section.

Now, all companies on records must come from the sync with Procore and we have added a pop-alert when clicking on 'invite company' as a reminder and also to provide you with instructions.

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

When entering the **Records** section in the portal, you would normally see 6 columns:

1. Full Name
2. Email
3. Mobile
4. Individual Status
5. Site Location Inductions
6. Actions

To the left of the portal, there is a function to **Invite Company**

Now, when clicking on **Invite Company** the below notification will pop up informing you that:

You must invite companies to your project in Procore. Once the new company is added, it will be synced and appear in TIKS.

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No data to display   No data to display   TIKS
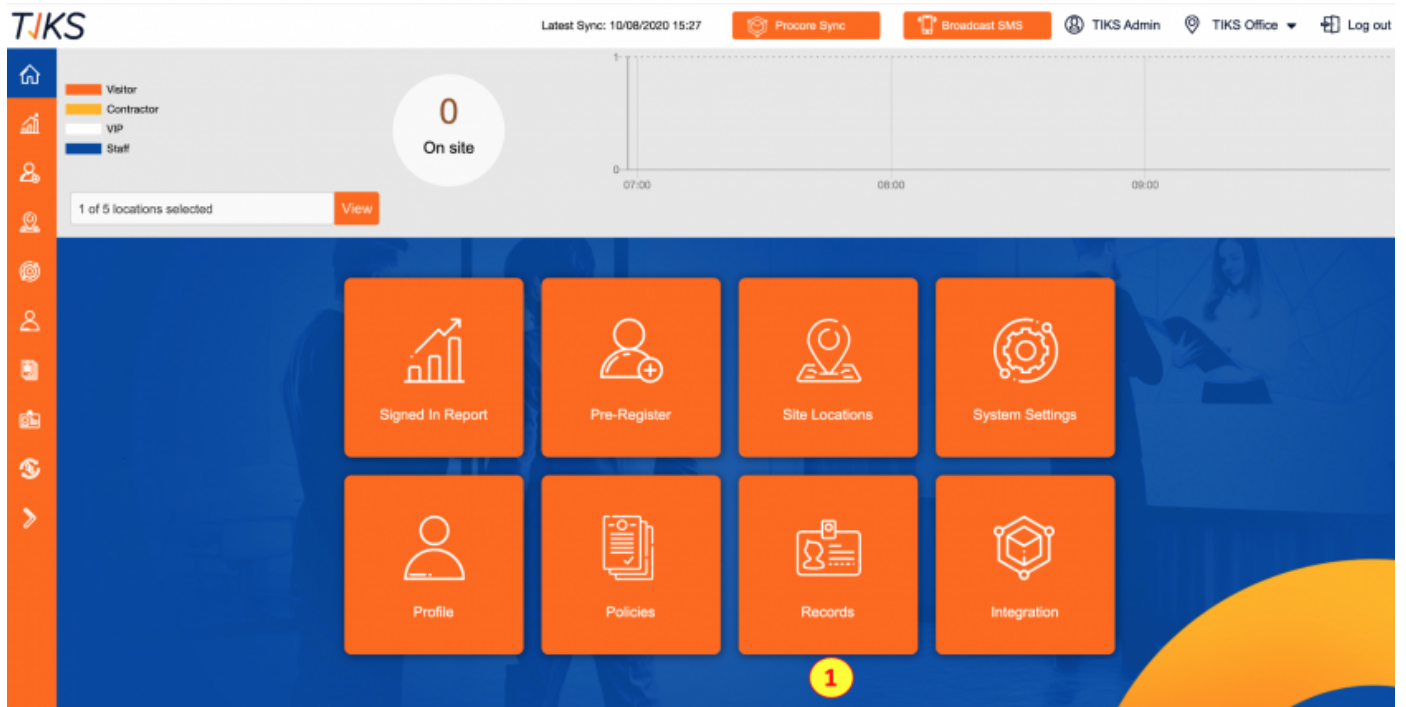
OK

Records After Update

What has changed in records?

Previously, Worksite Admin Managers could invite a company in the records section. Now, all companies on records must come from the sync with Procore and we have added a pop-alert when clicking on **'invite company'** as a reminder and also to provide you with instructions.

Update instructions:

- We have removed the inductions record to the individual records page, along with all other records
- We have created a combined status for the site called 'site-status' this way you can easily identify is the user is to be allowed on site.

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

When entering the **Records** section in the portal, you will now see 5 columns:

1. Full Name
2. Email
3. Mobile
4. Site Location Inductions
5. Actions

Site location Status:

- If its **green** - you don't need to look at other records pages
- If it is **red** - you can investigate what is missing

‹ Test Company › Individual List   ⬇ Download Report   ▼ Filter Results   🔍

Show entries

| 10 ▾ |

| 🏢 Test Company | 🔑 Full Name | ✉ Email | 🇦🇺 +61 ▾ |

| 📍 Please select locations ▾ | | | Invite Individual |

① **Full Name** ⬍ | ② Email ⬍ | ③ Mobile ⬍ | ④ Site Location Status | ⑤ Actions

| Visitor One
Company Administrator | visitor@one.com
Log In Sent 16/09/2020 15:18 | +61401234567 | **TIKS Office**
Not Approved Site Access | Print ID Card
View Records
Send Login Details
✎ 🗑 |

| PreReg Visitor One | prereg_visitor@one.com
Log In Sent 26/08/2020 16:05 | +61401234567 | **TIKS Office**
Not Approved Site Access | Print ID Card
View Records
Send Login Details
✎ 🗑 |