

# VMS + Records Update

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# 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.

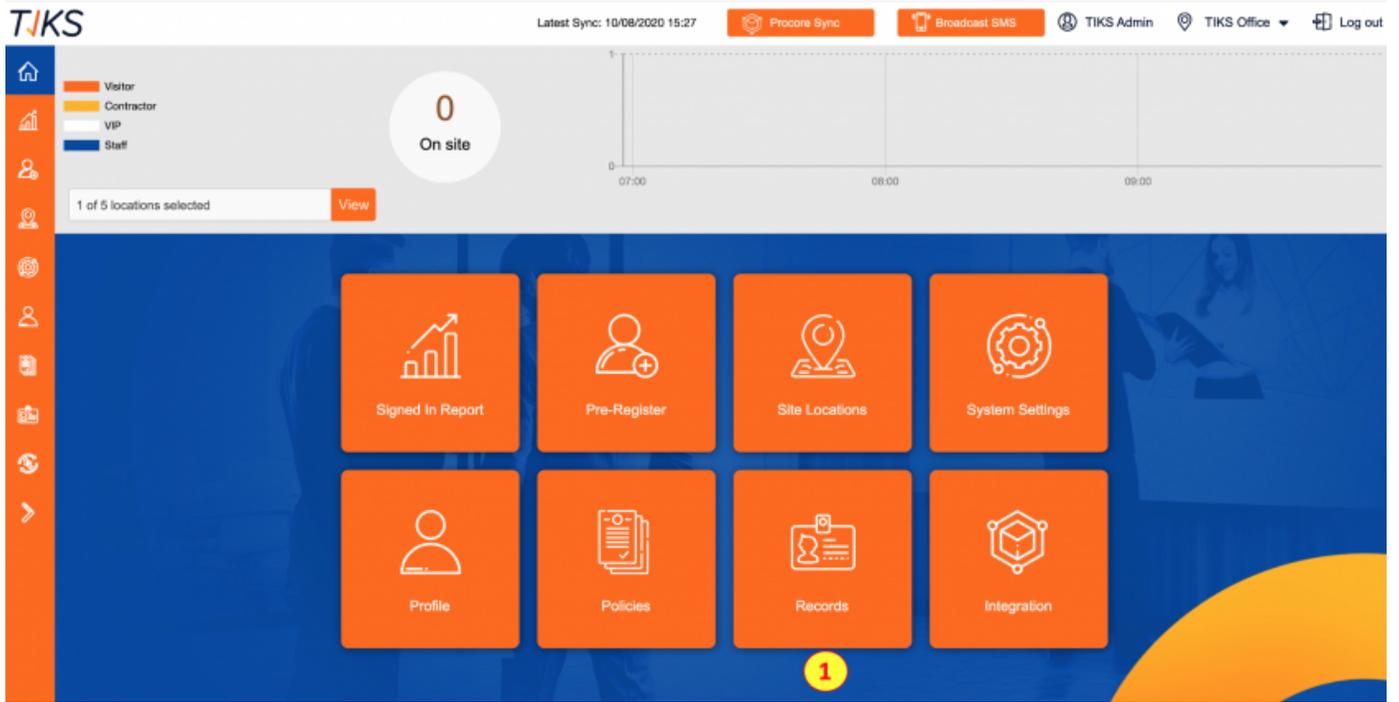
When using the Procore integration, the companies you already have on Procore will automatically be added to TIKS Records. However, you will have to manually invite an Administrator for each of the synced companies from Procore.

## **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.

- 
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

TIKS Latest Sync: 19/08/2020 14:40 Procore Sync Broadcast SMS TIKS Admin TIKS Office Log out

###ProcoreCompany > Individual List Download Report Filter Results

Show entries: 10

Company Name: ###ProcoreCompany Full Name: Email: +61\* Please select locations Invite Individual

1	2	3	4	5	6
Full Name	Email	Mobile	Individual Status	Site Location Inductions	Actions
Procore User	procore@user.com Log In Sent 13/08/2020 11:15		Pending Approval Since: 12/08/2020 14:36	TIKS Office (318 days left)	Print ID Card View Records Send Login Details
Test User	test@user.com Log In Sent 19/08/2020 10:55		Pending Approval Since: 19/08/2020 10:55	TIKS Office (incomplete)	Print ID Card View Records Send Login Details

Total: 2 entries

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

TIKS Latest Sync: 24/09/2020 22:49 Procore Sync Broadcast SMS TIKS Admin TIKS Office Log out

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
TIKS	No data to display	No data to display	Pending Approval	TIKS Office	View Individuals View Records

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.***



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

No data to display

No data to display

TIKS

OK

# Records After Update

## What has changed in records?

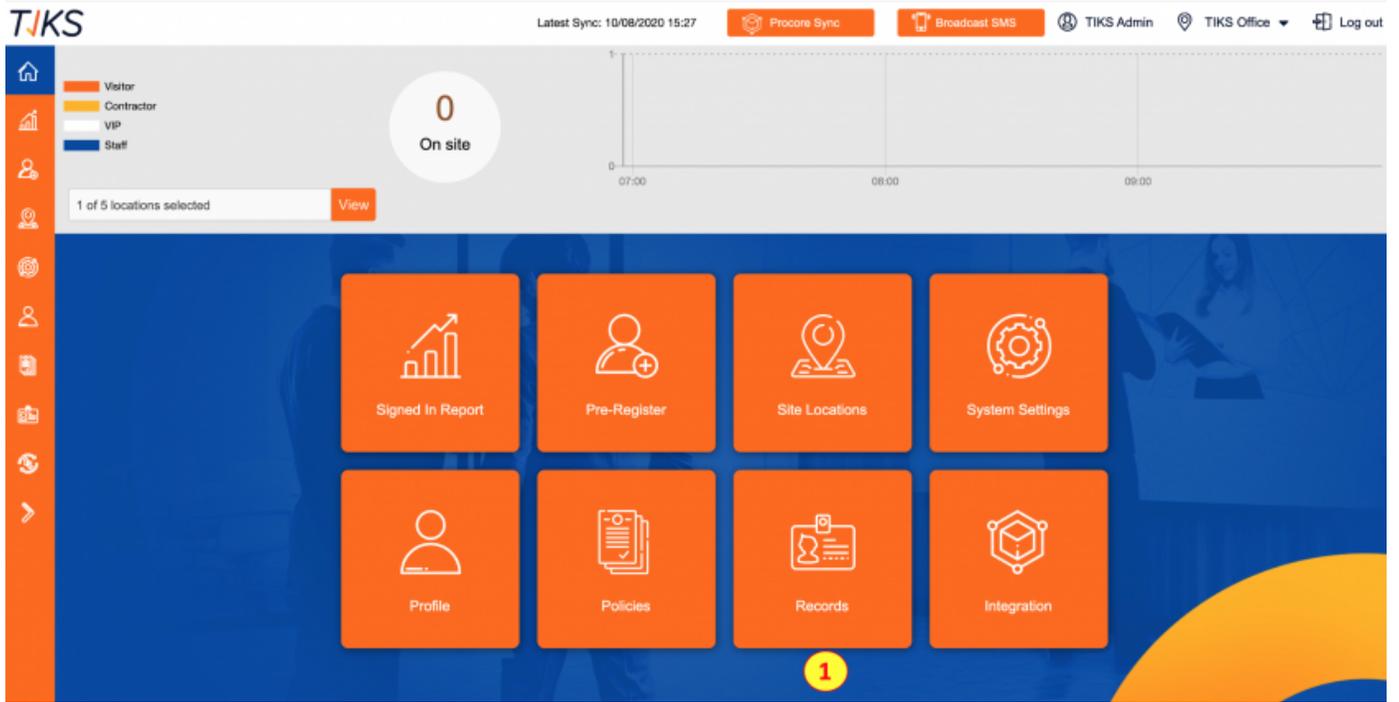
Previously, Worksite Admin Managers could invite a company in the records section. Now, all companies on records must come from the sync with Procore and we have added a pop-alert when clicking on **'invite company'** as a reminder and also to provide you with instructions.

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## 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
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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 ↶ ↷
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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 ↶ ↷
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