

Records After Update

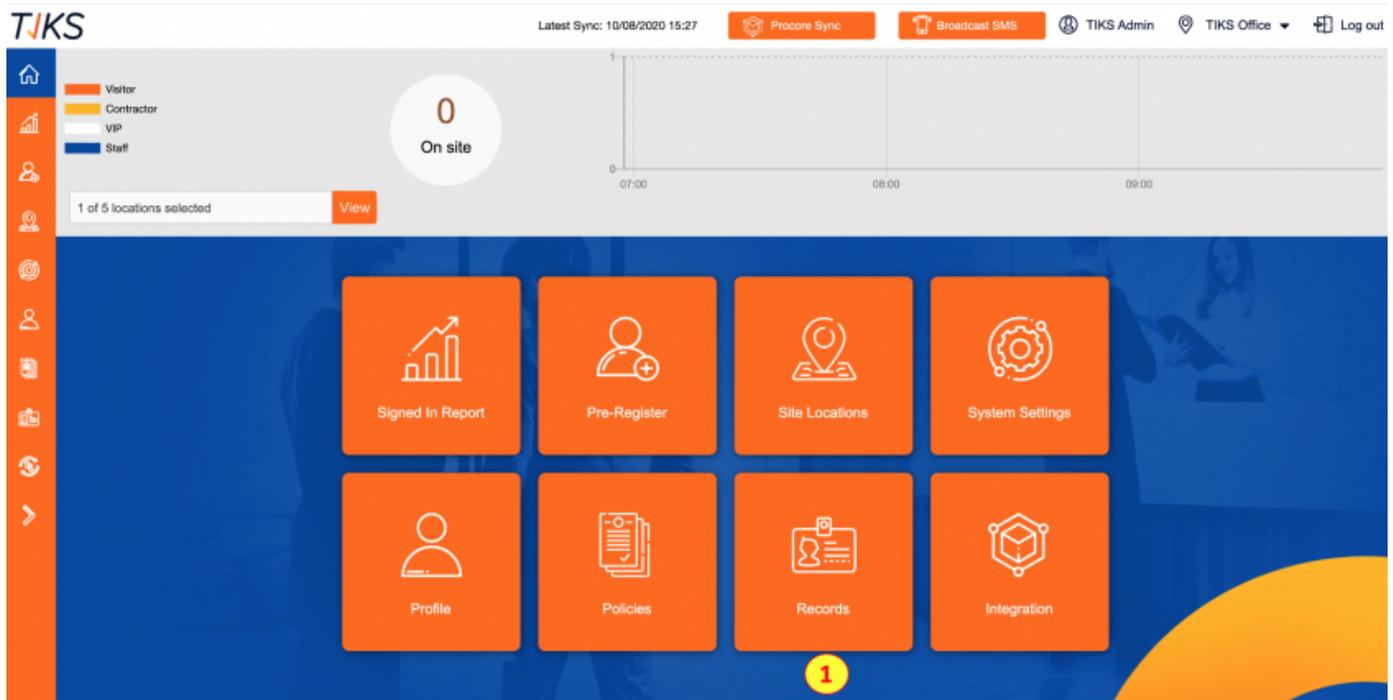
What has changed in records?

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.

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

TIKS Latest Sync: 28/09/2020 10:38 Procure Sync Broadcast SMS TIKS Admin TIKS Office Log out

Test Company > Individual List Download Report Filter Results

Show entries: 10

Test Company Full Name Email +61 - Please select locations Invite Individual

1	2	3	4	5
Full Name	Email	Mobile	Site Location Status	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

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