

Records After Update

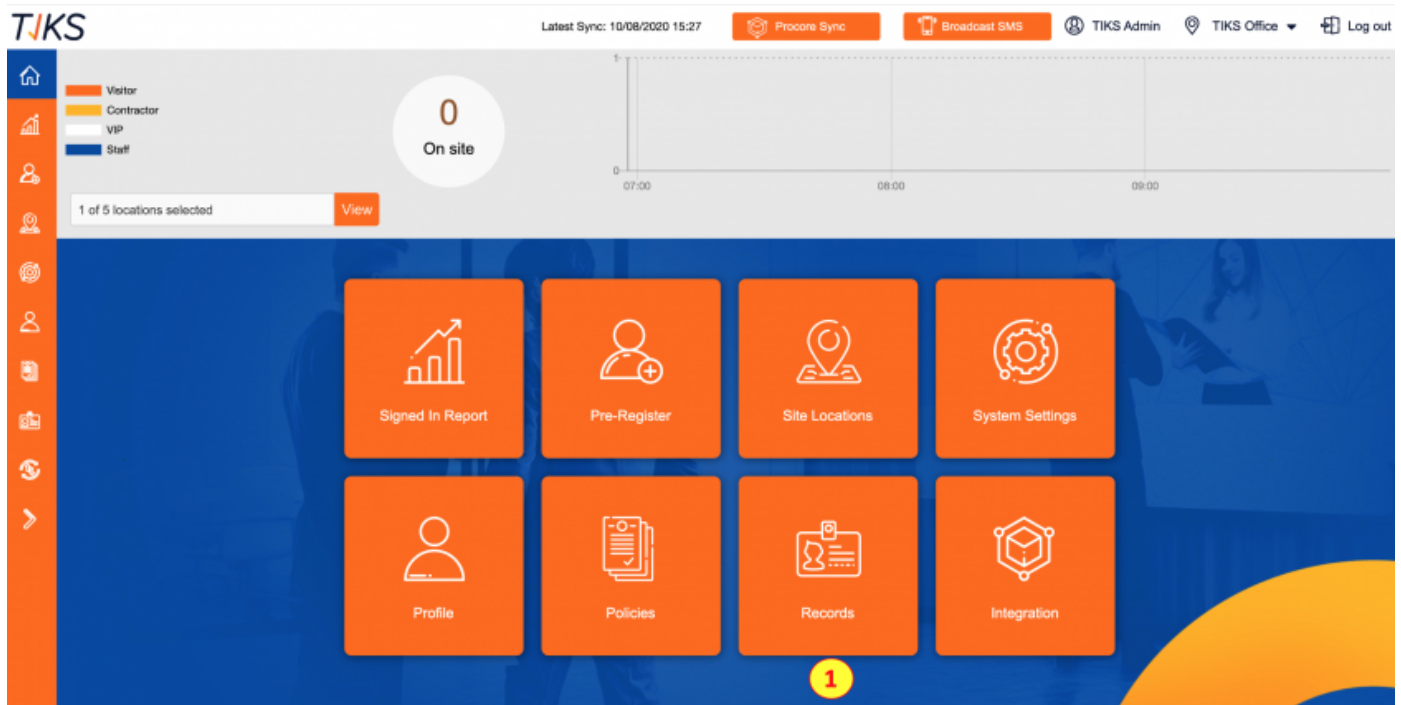
What has changed in records?

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

Revision #9
Created 4 years ago
Updated 4 years ago