Recommended Data Entry Sequence

When you log in to isCompliant, we recommend you start entering your data in the following sequence so that the modules are set up to work correctly with your company specific information. The Company, Tables and Notifications tabs can be found by clicking on the Menu button in the top left hand corner.

Module / Area	Tabs
Company	• Company Information • Customisation • Coding Rules *(these rules establish whether you would like to set your own unique identifying code for each record in a module, or if you would like the system to assign one for you.)*
Tables	• Departments • Sites • Rooms • Processes • Storage locations • Device types • Sub types • Supplier categories
People	• Main details • Status • Contact details • Health & safety • Roles *(log in details / permissions)*
Customers	All tabs *(as required)*
Suppliers	All tabs *(as required)*
Notifications	• RACI Roles • RACI Role Occupants *(if required)*
Company	• RACI Rules *(if required)*
Projects	All tabs *(as required)*
Assets	All tabs *(as required)*
Tables	• Competency Categories • Competencies • Roles • Role Competencies
People	• Employment *(select job description)* • Training
Audit Templates	All tabs *(as required - alternatively, open Downloads and download any pre-made Audit Templates. These can then be amended to suit your requirements.)*
Meeting Templates	All tabs *(as required - alternatively, open Downloads and download any pre-made Meeting Templates. These can then be amended to suit your requirements.)*
Company	• Risk Matrix
Risk and Opportunities	All tabs *(as required)*
Environmental Controls	All tabs *(as required)*
Hazardous Substances	All tabs *(as required)*
Emergency Planning	All tabs *(as required)*
Tables	• Feedback Categories
Feedback	All tabs *(as required)*
Obligations	All tabs *(as required)*
Meetings	• Schedule Meetings
Audits	• Schedule Audits
Company Objectives	All tabs (as required)