

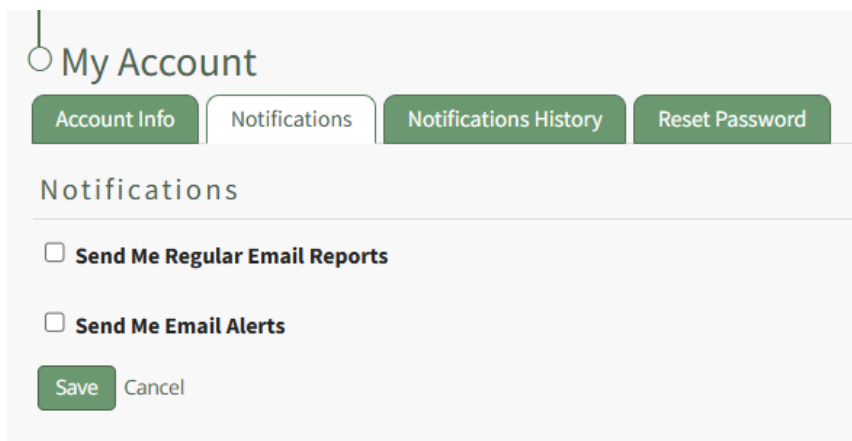
Account Module Email Alert Summary

Users can enable and set their own notifications preferences for system emails on the Notifications Tab of the My Accounts Page in the Accounts Module.

How To: Edit Your Individual Email Report Preferences

Editing Your Individual Email Report Preferences

To edit your email report preferences, open the Notifications Tab on the My Accounts Page in the Accounts Module. This tab is also accessible from the Main Menu.



The screenshot shows the 'My Account' page with four tabs: 'Account Info', 'Notifications', 'Notifications History', and 'Reset Password'. The 'Notifications' tab is active. Below the tabs, the 'Notifications' section contains two checkboxes: 'Send Me Regular Email Reports' (checked) and 'Send Me Email Alerts' (unchecked). At the bottom of the section are 'Save' and 'Cancel' buttons.

Select the “Send Me Regular Email Reports” checkbox, opening selections to be made for customization.

Notifications

☒ Send Me Regular Email Reports

Drag items to put the modules in the order you would like to see them in your reports email.

From: TRAINING GROUND <noreply@kastrack.com>
To: morkusmba@gmail.com test
Subject: TRAINING GROUND KASTrack Report for Mitzi Orkus #Date#

Actions

Receive: Do Not Receive

Assets

Receive: Do Not Receive

Documents

Receive: Executive Summary

Finance

Receive: Do Not Receive

People

Receive: Executive Summary, Detailed Report (All Users)

Reports

Receive: Do Not Receive

Email Report Frequency

☒ Daily ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

☐ Weekly ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

☐ Monthly

* Months that do not have these days will instead be sent on the last day of the month

☐ Send Me Email Alerts

Save Cancel

There are six modules with reports that can be emailed at the frequency of your choosing. The types of reports available for each module are shown below.

Regular Reports Available via Email Notifications	
Module	Reports Available
Actions	Executive Summary
Assets	Executive Summary, Detailed Report
Documents	Executive Summary
Finance	My Budgets, Executive Summary
People	Executive Summary, Detailed Report (All Users), Detailed Report (Supervised Users), Detailed Report (All Users Group By Supervisor)

Reports	Accounts: Current Accounts, All Payments, Budgets: All Budget Items, Budgets: Approval Status, Budgets: Pending Approvals, Budgets: Rejected Budget Items, Budgets: Summary, Open Invoices, People: Certification Status, People: Certification Status by Certification Role, People: Pending Approvals, People: Role Status, Time Summary (Previous Month), Time Summary (Current Month) The reports available from the Reports Module will vary per user based on what the individual has access to
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The modules listed can be dragged and dropped as desired for user preference or priority.

Email Report Icon Explanations	
Icon	Explanation
	The edit icon opens a dropdown menu with the reports available for that module.
	The check icon saves the report selections that were made.
	The X icon cancels changes made to the reports selections.

Adding Email Reports From Your Preferences

Click the edit icon to open the dropdown menu of available reports for the selected module.

Actions
 Receive: Do Not Receive 

Select the reports you would like to receive from the dropdown menu of options and click the check icon to save your preferences.

People

Detailed Report (All Users) 

Receive: Executive Summary 

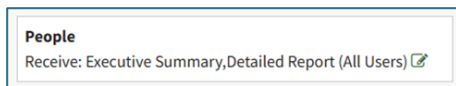
 

If no reports are selected and the box is left blank, your preference will show as “Do Not Receive”.

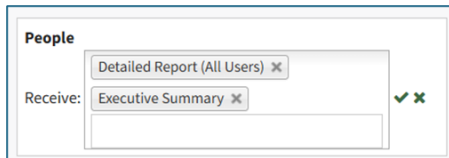
Click the check icon to save your selection.

Deleting Email Reports from Your Preferences

Click the edit icon to the right of the list of reports you are currently receiving.



This opens the menu for editing. Selecting the X icon immediately right of the report name to remove an individual report.



Click the check icon to save your selection.

Setting the Frequency of Email Report Notifications

KAStrack users can customize the frequency of their e-mail report notifications on a daily, weekly, or monthly basis.

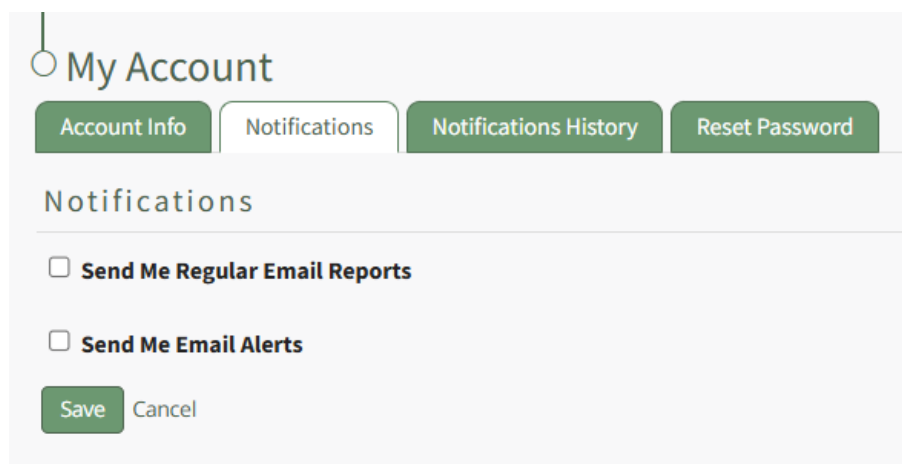
Email Report Frequency	
☒ Daily	☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday
☐ Weekly	☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday
☐ Monthly	* Months that do not have these days will instead be sent on the last day of the month

Daily email report notifications can be sent every day of the week, or on specific days. Select the appropriate checkboxes to indicate your preference. Selecting a weekly email report notification requires you to indicate which day of the week you prefer the report summary email to be sent. Selecting a monthly frequency requires the user to specify which numerical day of the month from a dropdown menu you wish to receive the report summary. The days that are not included in every month (29, 30, 31) have an asterisk next to them. If the current month does not have that particular date, the system will send the report on the final day of the month.

If you are not altering your email alert status, select the “Save” button to save your email report notification preferences. Clicking “Cancel” will not save changes and revert back to the previously saved preferences on the Notifications Tab of the My Account Page.

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My Account

Account Info Notifications Notifications History Reset Password

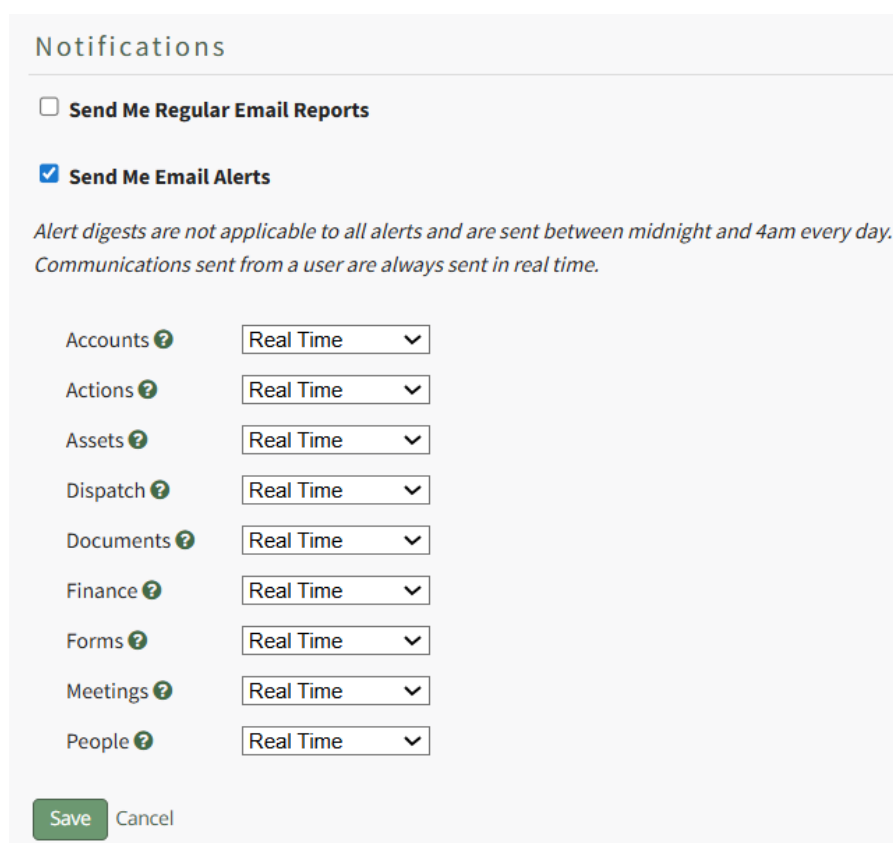
Notifications

☐ Send Me Regular Email Reports

☐ Send Me Email Alerts

Save Cancel

Select the “Send Me Email Alerts” checkbox opening the selections to be made for customization.



Notifications

☐ Send Me Regular Email Reports

☒ Send Me Email Alerts

Alert digests are not applicable to all alerts and are sent between midnight and 4am every day. Communications sent from a user are always sent in real time.

Accounts ?	Real Time ▼
Actions ?	Real Time ▼
Assets ?	Real Time ▼
Dispatch ?	Real Time ▼
Documents ?	Real Time ▼
Finance ?	Real Time ▼
Forms ?	Real Time ▼
Meetings ?	Real Time ▼
People ?	Real Time ▼

Save Cancel

KAStrack sends email alerts for the following modules: Accounts, Actions, Assets, Dispatch, Documents, Finance, Forms, Meetings, and People. Each module has a dropdown menu with three options that designate when an email alert is sent: “Real Time”, “Digest”, and “Do Not Receive”.

Real Time is the default setting that sends email alerts in real time. Digest is KAStrack's delayed timing feature. Selecting "Digest" will summarize all alerts with this designation to be sent daily between midnight and 4 a.m. Central Time (United States). Alert digests are not applicable to all alerts.

Whether or not an alert is digestible is specified by an individual with an admin access level.

Do Not Receive designates that the user does not wish to receive email alerts about that specific module.

Communications sent from users are always sent in real time.

When your desired selections are made, click on the "Save" button at the bottom of the screen. Clicking "Cancel" will not save changes and revert back to the previously saved preferences on the Notifications Tab of the My Account Page.

Account Module Email Alerts Summary Table

Email Alert	Digestible
Account Deactivated	Can be sent via digest
Account Inactivity Warning	Can be sent via digest
Password Changed	Sent in Real Time Only
Password Reset	Sent in Real Time Only
Account Role or Certification Red Warning	Can be sent via digest
User Registration	Sent in Real Time Only
Welcome Email	Sent in Real Time Only

Administrators can update the system default settings (including whether they are sent in real-time or digestible) for alert emails on the Settings Page of the Communications Module.

Revision #6

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