

Actions Module Summary

The Actions Module tracks action items for project management, recurring events, or processes. The Actions Module allows an organization the ability to track and manage action plans for projects. It is unique in its ability to build customized workflows with approval management for individual actions within an action group. The Actions Module is the go-to module for managing findings from internal or external audits. It is used for the implementation of recurring action item to do lists, such as steps to take for a employee/new client onboarding.

Actions integrates with the People Module and can automatically create and apply a template assigned to an individual when they are assigned to a new certification role within KAStack. Actions also integrates with the Finance Module, which brings simple budgeting tools to action / task management.

Action Groups

Action Groups can be defined as the overarching goal/event/task that is brought to fruition through the completion of the associated actions. Each action must be associated with a specific action group. Action Groups organize actions and defines like settings between its associated tasks.

The Module Pages summarized in the table below explain how actions and action groups can be created, managed, and utilized by your organization.

Actions Module Page Summary Table	
Page	Summary
Home Page	Selecting Home Page from the Main Menu opens the Actions Home Page, which lists any open actions in tabular form. The Home Page offers a variety of filters for actions that enable efficient workflow management.
Groups Page	Selecting the Groups Page from the Main Menu opens the Action Groups Management Page, where new action groups can be created and managed.
Templates Page	Selecting the Templates Page from the Main Menu opens the Action Groups Template Page. Templates can be created to quickly populate new action groups with a repeatedly used set of actions.
Supervisors Page	The Supervisors Page is only visible to account if they have supervised users. Selecting the Supervisors Page from the Main Menu opens the Supervisors Page which allows you to see actions organized by supervisor for a hierarchical management perspective.

[Settings Page](#)

The Settings Page in the Actions Module allows a user (with appropriate permissions) to designate parameters specific to the Actions Module and select the settings to be applied to Action Groups. The Settings Page is comprised of four tabs: Bulk Edit, Workflows, Budget Approvers, and Module Levels.

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