

Settings Page: Account Setting Tab

The Account Settings Tab on the Settings Page of the Communications Module allows for the viewing and bulk editing of account users' Email Report and Email Alert Notifications Settings preferences.

Settings

Module Settings

Notification Templates

Communication Templates

Account Settings

Alert Email Templates

Module Levels

Account Settings

Search:

Edit Selected

Set Selected

The page is divided into two tables, one for Email Reports and one for Email Alerts.

Selecting the checkbox in the first column and first row of the Reports and Alerts Table will select all users in that table. Selecting a user in one table automatically selects them in the other.

At the top of the page, you can filter users by username, first name, or last name. Begin typing in the long Search field and the page will automatically filter to matching users. The dropdown to the right of the Search field allows you to filter by users who have Active or Inactive status for either Email Reports or Email Alerts. Leave the dropdown blank to show all users regardless of status.

Reports									
☐	User	Active	Actions	Assets	Documents	Finance	People	Reports	Frequency
☐	abecker (Allison Becker)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)

The Account Settings Reports Table will list all users. If the user is receiving reports, a check will show in the Active Column. If not, an X will show. The report sent for each module will be listed, or Do Not Receive will show if none are selected. The frequency email reports are received will show in the frequency column.

The Account Settings Alerts Table will list all account users. If the user is receiving reports, a check will show in the Active Column. If not, an X will show. Each module will state if alerts are being sent in Real Time, Digested (sent between midnight and 4 a.m. Central Time (United States) daily), or set to Do Not Receive.

The “Edit Selected” button will edit email report/alert settings for existing users.

How To: Edit Email Report / Alert Settings for Existing Users

To edit email report / alert settings for existing accounts, go to the Account Settings Tab on the Settings Page of the Communications Module.

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Reports

☐	User	Active	Actions	Assets	Documents	Finance	People	Reports	Frequency
☐	abecker (Allison Becker)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
☐	akrueger (Allen Krueger)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
☐	avargas (Anthony Vargas)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)

Select the users whose email report/ alerts notification settings you wish to edit.

Account Settings

Search:

The Search textbox simplifies the search for specific users. The dropdown menu allows you to select between users’ current statuses for Reports/Alerts receipt. If you wish to edit all user accounts with the same new settings, select the checkbox in the title row of the table to select all users in the table. Selecting a user in one table automatically selects them in the other.

Select the “Edit Selected” button, opening the Update Account Settings Modal.

Update Account Settings

Reports

Status

Not Active

Actions

Do Not Receive

Assets

Do Not Receive

Documents

Do Not Receive

Finance

Do Not Receive

People

Do Not Receive

Reports

Do Not Change

Email Report Frequency

☒ Daily

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

☐ Weekly

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

☐ Monthly

1st

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

Alerts

Status

Active

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

Make the desired changes for both email reports/alerts that you would like to apply to the pre-selected users.

Select “Save” for the notification preferences to be altered. Click “Cancel” to return to the Account Settings Tab on the Settings Page with any user accounts being impacted.

The “Set Selected” button will apply a notifications template for existing users.

How To: Apply a Notification Template to Existing Accounts

To apply notification templates to existing accounts, go to the Account Settings Tab on the Settings Page of the Communications Module.

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Account Settings

Search:

Edit Selected

Set Selected

Reports

	User	Active	Actions	Assets	Documents	Finance	People	Reports	Frequency
☐	abecker (Allison Becker)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
☐	akrueger (Allen Krueger)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)
☐	avargas (Anthony Vargas)	✖	Do Not Receive	Do Not Receive	Do Not Receive	(Not Set)	Do Not Receive	(Not Set)	(Not Set)

Select the existing user accounts you wish to apply the notification template to.

How To: Create New Notification Templates

Note: A default new user Notification Template already exists in the system. This template can be edited for your preferences.

How To: Edit New User Notification Templates

To edit new user notification templates, go to the Notification Templates Tab on the Settings Page of the Communications Module.

Settings Communications > Settings > Notification T

Module Settings Notification Templates Communication Templates Account Settings Alert Email Templates Module Levels

Notification Templates

Default template to use for new accounts: Default New User ▼

Add Notification Template

Title	Description	Actions
Default New User		
Admins with Reports		
District Managers	This is the preferred notification settings for District Managers.	

Existing templates will be shown in the Notification Template Table.

Select the edit icon in the action column of the template you wish to edit opening the Edit Notification Template Page.

Settings Communications > Settings > Notification Templates > Edit T

Module Settings Notification Templates Communication Templates Account Settings Alert Email Templates Module Levels

Edit Notification Template

Template Name

Template Description

This is the preferred notification settings for District Managers.

A notification template is comprised of two parts: Reports and Alerts.

Indicate the desired status for email report notifications: Not Active or Active.

Reports

Status

Not Active

Actions

Do Not Receive

Assets

Do Not Receive

Documents

Do Not Receive

Finance

Do Not Receive

People

Do Not Receive

Reports

(Do Not Change)

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

Alter the desired reports selected for each module or leave as “Do Not Receive”.

Email Report Frequency has three options: daily (or on specified days of the week), weekly (on the day of your choosing), or monthly (which requires the user to specify which numerical day of the month from a dropdown menu you wish to receive the report summary).

After setting template preferences for reports, scroll down to set template preferences for email alerts.

Alter email preferences as set by module through a dropdown menu with three options that designate when an email alert should be sent: “Real Time”, “Digest”, and “Do Not Receive”.

Alerts

Status

Active

Accounts

Real Time

Actions

Real Time

Assets

Real Time

Documents

Real Time

Finance

Real Time

Forms

Real Time

Meetings

Do Not Receive

People

Real Time

Save

Cancel

After making edits to your preferences for both Email Report and Email Alert Settings, select “Save”, returning you to the Notification Templates Tab on the Settings Page of the Communications Module.

The newly created notification template will now be shown on the Notification Template Table.

To create a new notification template, go to the Notification Templates Tab on the Settings Page of the Communications Module.

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Communications > Settings > Notification Templates

Module Settings

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Communication Templates

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Notification Templates

Default template to use for new accounts: Default New User

Add Notification Template

Title	Description	Actions
Default New User		
Admins with Reports		

Select the “New Notification Template” button, opening the Edit Notification Template Page.

Settings

Communications > Settings > Notification Templates > Edit Template

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Add Notification Template

Template Name

Template Description

Input a name for the new Notification Template as well as a description.

A notification template is comprised of two parts: Reports and Alerts.

Indicate the desired status for email report notifications: Not Active or Active.

KAStrack generates and sends reports for the following modules: Actions, Assets, Documents, Finances, and People, and Reports.

Reports

Status

Not Active

Actions

Do Not Receive

Assets

Do Not Receive

Documents

Do Not Receive

Finance

Do Not Receive

People

Do Not Receive

Reports

(Do Not Change)

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

Alter the desired reports selected for each module or leave as “Do Not Receive”.

Daily email report notifications can be sent everyday 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.

After setting template preferences for reports, scroll down to set template preferences for email alerts.

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”.

Alerts

Status

Active

Accounts

Real Time

Actions

Real Time

Assets

Real Time

Documents

Real Time

Finance

Real Time

Forms

Real Time

Meetings

Do Not Receive

People

Real Time

Save Cancel

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). As noted in KAStrack, alert digests are not applicable to all alerts.

Whether or not an alert is digestible can be customized on the Alert Email Templates Tab of the Communications Module.

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

After selecting your preferences for both Email Report and Email Alert Settings, select “Save”, returning you to the Notification Templates Tab on the Settings Page of the Communications Module.

The newly created notification template will now be shown on the Notification Template Table.

Account Settings

Search:

The Search textbox simplifies the search for specific users. The dropdown menu allows you to select between active / inactive users. If you wish to edit all user accounts with the same new settings, select the checkbox in the title row of the table to select all users in the table. Selecting a user in one table automatically selects them in the other.

Select the “Set Selected” button opening the Update Account Settings Modal.

Account Settings

Search:

The existing notification templates will show in the dropdown menu. Select the template you wish to apply to the selected user accounts.

Select “Save” for the notification template to be applied. Click “Cancel” to return to the Account Settings Tab on the Settings Page with any user accounts being impacted.