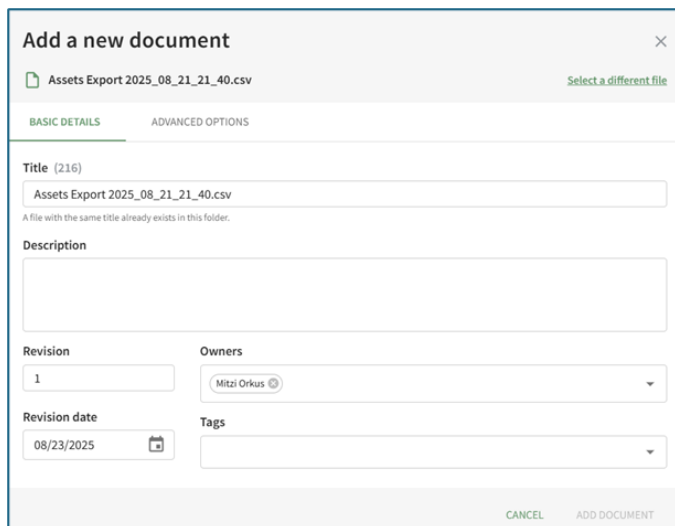


Customizable Document Properties

Each file uploaded in the Documents Module has customizable properties that are designated when a new file is uploaded. An explanation of those properties are explained in the Basic Details and Advanced Options Tabs below.

Basic Details

Under the Basic Details Tab, the user can input a title, description of the file, revision number and revision date. They can also designate any document owners (the uploader is initially included as an Owner by default) and tags.



The screenshot shows a modal window titled "Add a new document" with a close button (X) in the top right corner. Below the title, there is a file selection area showing "Assets Export 2025_08_21_21_40.csv" and a link "Select a different file". The modal is divided into two tabs: "BASIC DETAILS" (active) and "ADVANCED OPTIONS". Under "BASIC DETAILS", there are several input fields: "Title (216)" with the value "Assets Export 2025_08_21_21_40.csv" and a warning "A file with the same title already exists in this folder."; "Description" with an empty text area; "Revision" with a dropdown menu set to "1"; "Revision date" with a date picker set to "08/23/2025"; "Owners" with a dropdown menu showing "Mitzi Orkus"; and "Tags" with an empty dropdown menu. At the bottom, there are "CANCEL" and "ADD DOCUMENT" buttons.

If the incorrect file was selected, the user can click “Select a different file” from the top right corner of the modal to exchange it with the correct file.

Document owner(s) can be selected from a dropdown list of users.

Document owners have the ability to approve documents, which is relevant for companies who are required to attest an annual/periodic review for regulatory agencies or other governing bodies. Document owners are also notified any time a new comment is made on a file and are responsible for affirming continued suitability of the file if enabled under Advanced Options.

Advanced Options

Selecting the Advanced Options Tab allows the user to apply enhanced settings to the file. An explanation of each Advanced Options checkbox is included in the table below.

Add a new document [X]

Assets Export 2025_08_21_21_40.csv [Select a different file](#)

BASIC DETAILS **ADVANCED OPTIONS**

- Document is public
- Document is 360° photo
- New revisions require approval
- New revisions require acknowledgement
- Send notifications of new revisions
- Requires future review by owner

CANCEL ADD DOCUMENT

Document Advanced Options Explanations	
Checkbox	Explanation

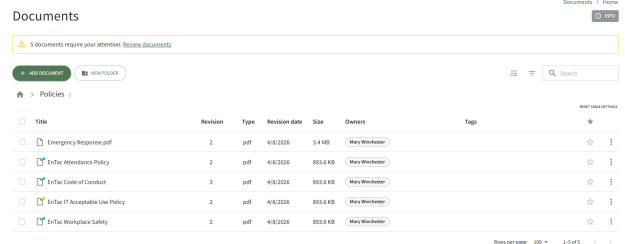
Document is Public

Selecting the "Document is public" checkbox allows individuals who are not users in the KAStack system to view files.

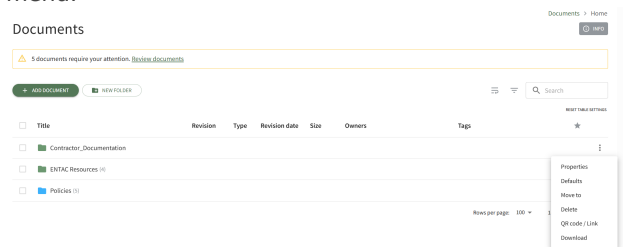
Users in KAStack will need appropriate permissions to view the file regardless.

How To: Designate a File is Public

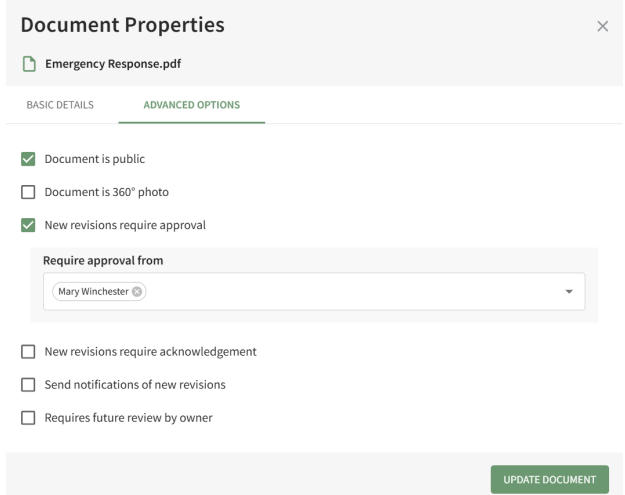
To designate a document/file as Public in the Documents Module, open the Documents Home Page from the Main Menu and navigate the repository to the file you want to designate as public.



Click the vertical three-dot icon to the right of the file you wish to make public, opening the file's context menu.



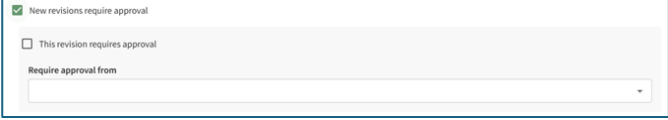
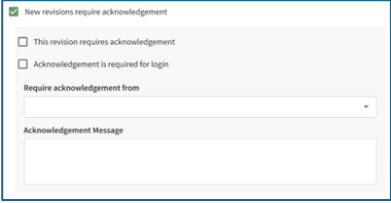
Select Properties opening the Basic Details Tab of the Document Properties modal. Open the Advanced Options Tab.


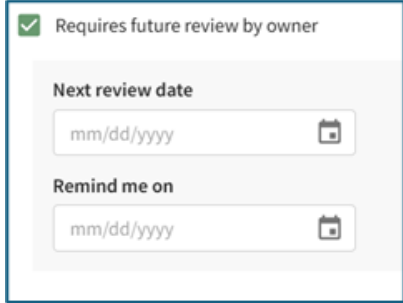


Select the checkbox to designate the "Document is Public" and click the Update Document button. A pop-up confirms that the document is now public.



The file's icon is now blue, indicating that the document is public.

<p>Document is 360° Photo</p>	<p>Selecting the “Document is a 360° photo” checkbox communicates to KAStrack that the file is intended for 360° viewing to ensure it shows correctly.</p>
<p>New Revisions Require Approval</p>	<p>Selecting the “New revisions require approval” checkbox opens a dropdown menu. Approval requirements for the file can be designed by Access Level, Certification Role, or specific individuals in the system. An additional checkbox can be selected if this revision requires approval.</p>  <p>Users view the files that require approval on the Documents Module Review Page.</p>
<p>New Revisions Require Acknowledgement</p>	<p>Selecting the “New revisions require acknowledgement” checkbox allows acknowledgement requirement customization.</p>  <p>The “This revision requires acknowledgement” checkbox will notify the Access Levels, Certification Roles, or individuals selected of the new document. If “Acknowledgement is required for login” is selected, a user will not be able to access anything in KAStrack until the user acknowledges the revised document. A textbox allows the user to include a customized acknowledgement message that will be included in the automated message sent out to users by KAStrack.</p> <p>Users view the files that require acknowledgement on the Documents Module Review Page, or just after signing in, when “Acknowledgement is required for login” is enabled.</p>

<p>Send Notifications of New Revisions</p>	<p>Selecting the “Send notifications of new revisions” checkbox allows a user to customize (by Access Level, Certification Role, or individual) who receives an email notification that a new file revision has been updated in KAStrack. An additional checkbox can be selected if a notification is to be sent for this revision.</p>  <p>Users view the files they have received notification of on the Documents Module Review Page.</p>
<p>Requires Future Review by Owner</p>	<p>Selecting the “Requires future review by owner” checkbox allows the user to schedule the next review date and set a reminder for the review deadline.</p>  <p>Users review files for continued suitability on the Documents Module Review Page.</p>

Revision #3

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