

# Settings Page

The Module Levels Tab of Settings Page can be accessed from the Main Menu. The system default module levels for the module are visible in the Module Levels Table. New module levels with customizable permissions can be created and managed on this tab.



Module Level Name	Actions
Admin	
Guest	
Observer	
Publisher	
Staff	





There are four system default module levels associated with the Documents Module. An explanation of the permissions associated with each default module level are shown in the Documents Module Level Permissions Table below.

System default module levels cannot be customized.

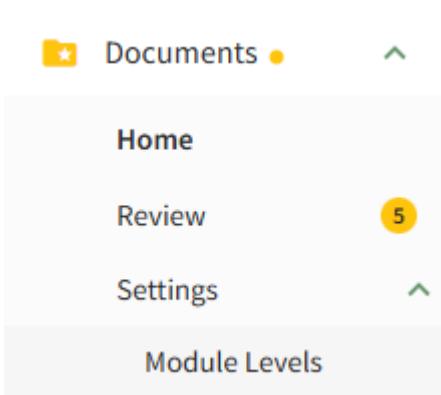
Documents Module - Module Level Permissions	
Module Level	Permissions
Admin	Manage users (view, edit, delete), Manage groups (add, view, edit, edit group defaults, delete), Manage roles (permissions, add, assign, unassign, view, edit, and delete), Download and view documents, can view documents from all modules, own-moc, Upload (new documents, revisions), View (deleted, rejected, abandoned, superseded, submitted, non-approved, pending documents), view document status and detailed document history, Edit (documents, document status, document approvers, document acknowledgers, document notifications, document review date, document owners, document acknowledgment message), Delete documents and approved documents, Distribute documents, Add/Delete/Edit Comments
Guest	Download documents, view documents, own-moc

Publisher	Download documents and old versions, view documents, own-moc, Manage groups (view, edit, edit group defaults, delete), Upload (new revisions, new documents), View (deleted, rejected, abandoned, superseded, submitted, non-approved, pending documents), view document status and detailed document history, Edit (documents, document status, document approvers, document acknowledgers, document notifications, document review date, document owners, document acknowledgment message), Delete documents and approved documents, Distribute documents, Add/Delete/Edit Comments
Staff	Download documents, view documents, own-moc, Upload (new revisions, new documents), View (deleted, rejected, abandoned, superseded, submitted, non-approved, pending documents), View document status and detailed document history, Edit (documents, document approvers, document acknowledgers, document notifications, document review date, document owners, document acknowledgment message), Delete documents, approved documents, pending files, Add/Delete Comments

New Module Levels can be created in order to customize module level permissions. An explanation of the icons associated with customized module levels have been provided in the table below.

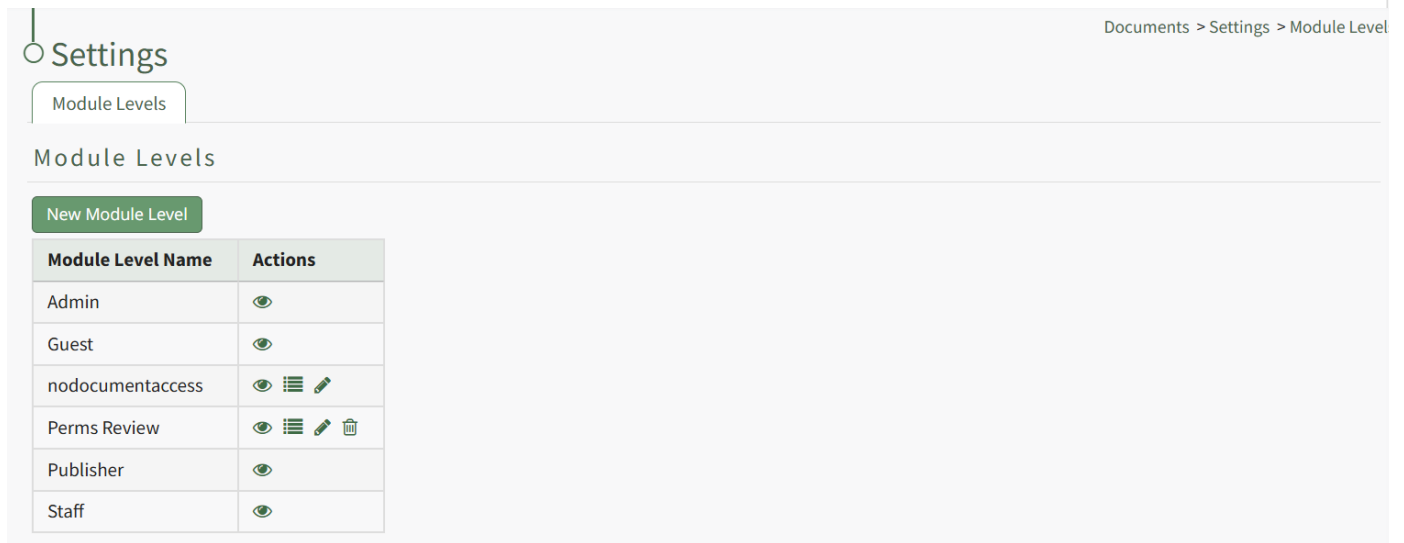
Module Level Customization Icons	
Icon	Explanation
	The eyeball icon allows you to view users assigned to the module level as well as the permissions assigned to them.
	The bulleted list icon allows you to assign permissions to customized module levels.
	The pencil icon opens the Edit Module Level Modal.
	The trashcan icon opens the Delete Module Level Confirmation Modal.

### How To: Create a New Module Level (Documents)



The screenshot shows a navigation menu for the 'Documents' module. At the top, there is a yellow star icon followed by the text 'Documents' and a green upward arrow. Below this, there is a list of menu items: 'Home', 'Review' (with a yellow circle containing the number '5' next to it), 'Settings' (with a green upward arrow next to it), and 'Module Levels' (which is highlighted with a grey background).

To create a new Module Level with customized permissions in the Documents Module, select Module Levels under Settings in the Documents Module on the Main Menu, opening the Settings Page to the Module Level Tab.



Module Level Name	Actions
Admin	
Guest	
nodocumentaccess	
Perms Review	
Publisher	
Staff	

System default module levels cannot be customized. Module levels that are specific to your organization have additional actions to enable customization.

To create a new module level, select the New Module Level button opening the New Module Level Modal.



**New Module Level** ✕












**Module Level Name**

Assignable

**Save** **Cancel**

Input the name of the customized module level.

Check the box for Assignable to give permission for the new module level to be assigned to users if desired and click the Save button. Module levels will be listed alphabetically in the Module Level Table.

Module Level Name	Actions
Admin	
Guest	
nodocumentaccess	  
Perms Review	    <span>Permissions</span>
Publisher	
Staff	

Select the Permissions icon (the bullet point list to the right of the eye) in order to assign the customized permissions to the new Module Level. Click the checkbox to the left of the permissions you want to assign.

Permissions for Perms Review



- admin
  - manage-roles
    - add-role
    - assign-hidden-roles
    - assign-roles
      - assign-role-Admin
      - assign-role-Guest
      - assign-role-Kastrack Admin
      - assign-role-Manager
      - assign-role-Staff
      - assign-role-Super Admin
    - delete-role
    - edit-role
    - role-permissions
    - unassign-role
    - view-roles
  - manage-users
    - delete-user
    - edit-user
    - view-user
- can-view-documents-from-all-modules
- documents-responsibilities
- download-documents
- manage-documents
  - delete-approved-documents
  - delete-documents
  - delete-pending-files
  - distribute-document
  - document-add-comment
  - document-change-status
  - document-delete-comment
  - document-delete-own-comment
  - document-edit-own-comments
  - download-old-approved-versions
  - download-old-versions
  - edit-document-acknowledgers
  - edit-document-acknowledgment-message
  - edit-document-approvers
  - edit-document-notifications
  - edit-document-owners
  - edit-document-review-date
  - edit-documents
  - upload-new-document
  - upload-new-revision
  - view-abandoned-documents
  - view-deleted-documents
  - view-detailed-document-history
  - view-document-history
  - view-document-status
  - view-non-approved-documents
  - view-pending-documents
  - view-rejected-documents
  - view-submitted-documents
  - view-superseded-documents
- manage-groups
  - add-group
  - delete
  - delete-group
  - edit-group
  - edit-group-defaults
  - view-group
- own-moc
- view-documents
- view-system-tags

Save Cancel

Select the Save button.

PERMISSIONS WERE SAVED



A pop-up confirms that the permissions were saved.

Access levels for all modules can also be managed in the Site Settings Module on the Access Levels Tab.

A complete list of all permissions associated with the Documents Module have been provided below.

- admin
  - manage-roles
    - add-role
    - assign-hidden-roles
    - assign-roles
      - assign-role-Admin
      - assign-role-Guest
      - assign-role-Kastrack Admin
      - assign-role-Manager
      - assign-role-Staff
      - assign-role-Super Admin
    - delete-role
    - edit-role
    - role-permissions
    - unassign-role
    - view-roles
  - manage-users
    - delete-user
    - edit-user
    - view-user
  - can-view-documents-from-all-module
  - documents-responsibilities
  - download-documents
- manage-documents
  - delete-approved-documents
  - delete-documents
  - delete-pending-files
  - distribute-document
  - document-add-comment
  - document-change-status
  - document-delete-comment
  - document-delete-own-comment
  - document-edit-own-comments
  - download-old-approved-versions
  - download-old-versions
  - edit-document-acknowledgers
  - edit-document-acknowledgment-messa
  - edit-document-approvers
  - edit-document-notifications
  - edit-document-owners
  - edit-document-review-date
  - edit-documents
  - upload-new-document
  - upload-new-revision
  - view-abandoned-documents
  - view-deleted-documents
  - view-detailed-document-history
  - view-document-history
  - view-document-status
  - view-non-approved-documents
  - view-pending-documents
  - view-rejected-documents
  - view-submitted-documents
  - view-superseded-documents
- manage-groups
  - add-group
  - delete
  - delete-group
  - edit-group
  - edit-group-defaults
  - view-group
  - own-moc
  - view-documents
  - view-system-tags

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