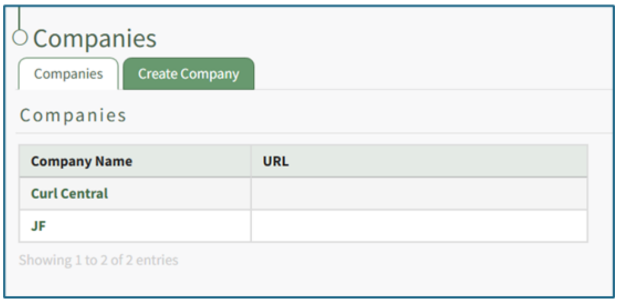
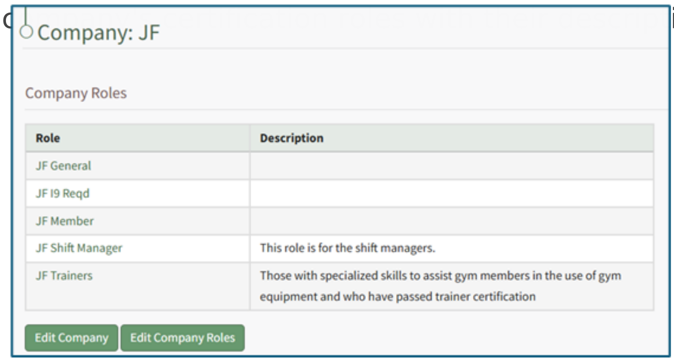
Define the Certifications Assigned to a Company's Certification Roles

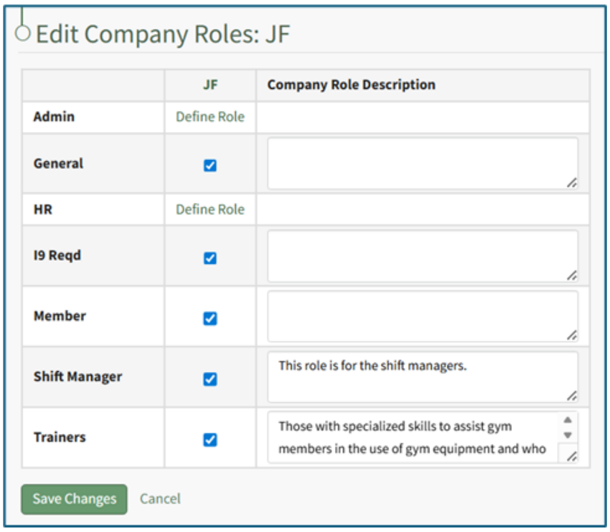
To define the certification roles associated with a specific company, select Companies in the People Module from the Main Menu opening the Companies Page. Click on the name of the company whose roles you want to define in the Companies Table.



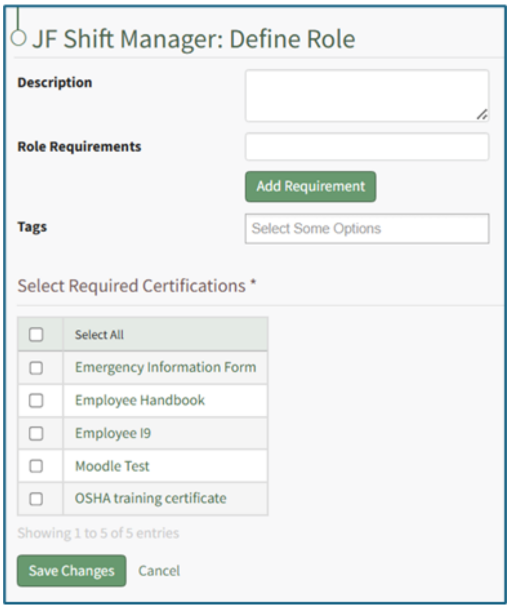
Clicking on the name of a company will open the company's Details Page that displays the c ion.



Select the “Edit Company Roles” button to open the Company Roles Description Table. A certification role can be assigned to different companies. The Company Role description allows you to customize the description of the certification role for that specific company.



If a Certification Role has not yet been defined, clicking “Define Role” in the Company column will open the company's Define Role Page.



Optionally input a description of the new role in the textbox.

Role requirements are shown on the Role Info Tab on the Roles Page. Any specific requirements for the certification role can be added. Clicking the “Add Requirement” button opens a new text box, allowing for unlimited Role Requirements. These Role Requirements serve as guidance for adding new users to a particular Certification Role; there is currently no mechanism in KAStrack that further defines the criteria of these requirements or enforces them.

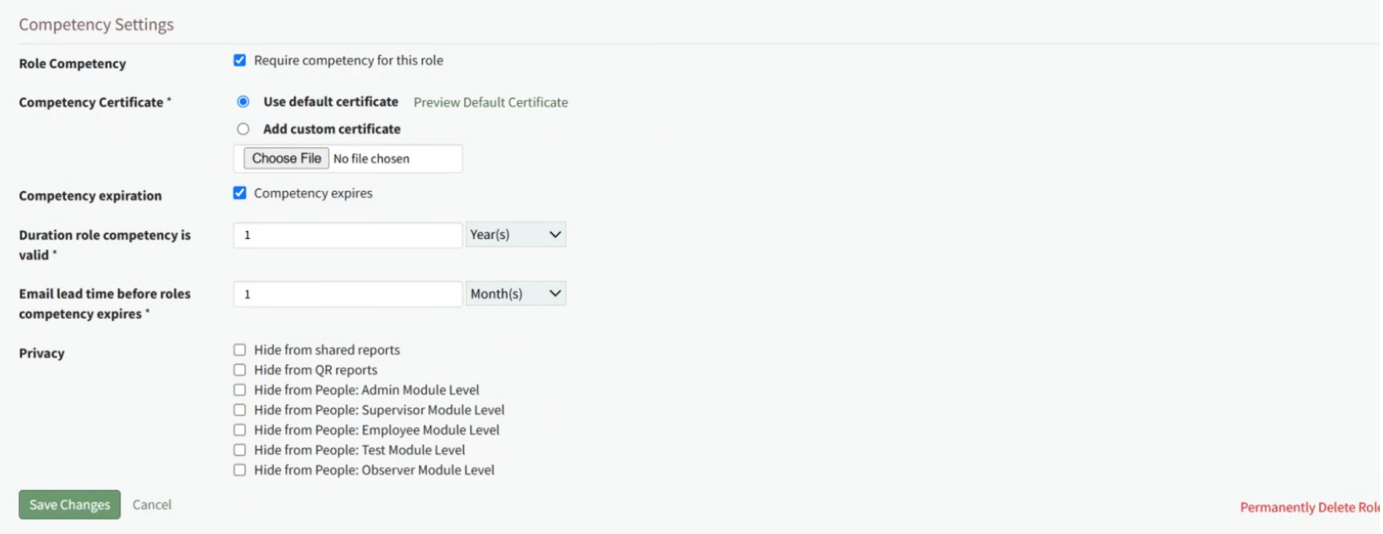
Select the desired tags for additional filters.

> Certification Roles can be tagged for filtering purposes; however, Certification Roles currently do not honor the permissions for Permissive and Restrictive tags and will instead behave as if they’ve been tagged with Open tags.

If competency tracking is enabled for your KAStrack installation, the next section will allow definition of the Competency Settings for the Certification Role.

How To: Define Competency Settings for a Role

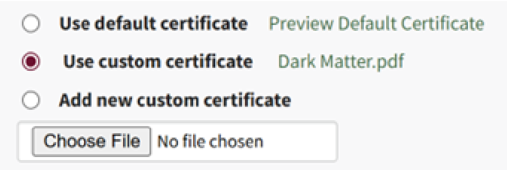
If competency tracking is enabled for your KAStrack installation, you can define the Competency Settings for a Certification Role while creating or editing the role. Competency allows your organization a way to track users' fitness / competence to be assigned to a particular role. This provides a way to ensure users meet the necessary requirements and standards to perform the role they're in.



To enable Competency tracking for a Certification Role, click the checkbox next to "Require competency for this role".

Next, choose whether to "Use default certificate" or "Add custom certificate" for Competency evaluation. Using the default certificate will assign a system-generated evaluation worksheet to be filled out when the assigned user's competency requirement is being completed. If you'd like to use a different certificate for this purpose, choose "Add custom certificate" and then select the "Choose File" button underneath it and upload the desired file.

> When editing Competency Settings after a custom certificate has been selected, these options change to allow selection between the default certificate, the existing custom certificate, and adding a new custom certificate.



If the competency expires after a certain amount of time, click the checkbox next to "Competency expires". This allows you to define the "Duration role competency is valid" and "Email lead time before roles competency expires". The duration the competency is valid refers to the time until the competency expires. The email lead time refers to the warning period given to the user before their competency has expired. Fill in a numerical value next to each field, and choose the time period of either years, months, weeks, or days. To ensure the user is properly alerted that their competency is expiring soon, make sure that the "Email lead time" value is sooner than the value for the "Duration role competency is valid".

Privacy settings on the Competency allow you to hide competency for this role from various reports and/or users with specified People Module Levels. Click the checkbox next to any options you'd like to hide the role competency from. If choosing People Module Levels, users with only those Module Levels will not see the role competency when viewing reports that include it, and also will not see it as a required action If they are assigned to this Certification Role. If you'd like to hide the Competency from inclusion in any shared reports or QR reports, regardless of a user's People Module Levels, select those options.

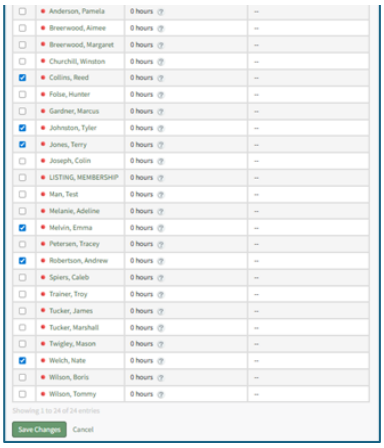
> Selecting a People Module Level in Privacy hides the Competency from users with only that Module Level. If a user has multiple People Module Levels, they may still see the Competency unless the Competency is hidden from all of those Module Levels.

How To: Record a New Competency Certificate

The KAStrack team is writing a new how to for you! Coming soon!

Select the Required Certifications that apply to the new Certification Role. Use the checkbox in the header row to select all available Certifications.

Click the "Save Changes" button to save the new certification role details, automatically opening the Edit Users Table of the Assigned Users Tab.



Use the checkboxes in the first column to identify the users that the new role applies to. Use the checkbox in the header row to select all available users.

Click the “Save Changes” button and return to the Assigned Users tab.

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