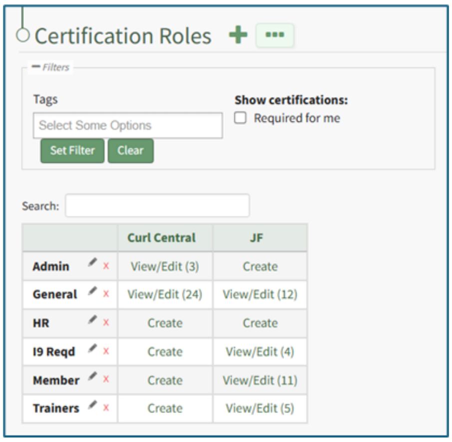
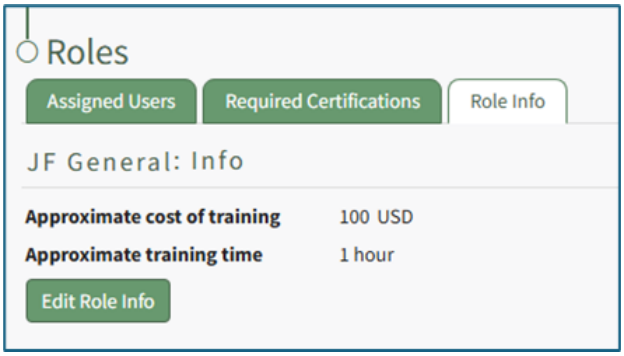
Edit Certification Role Information

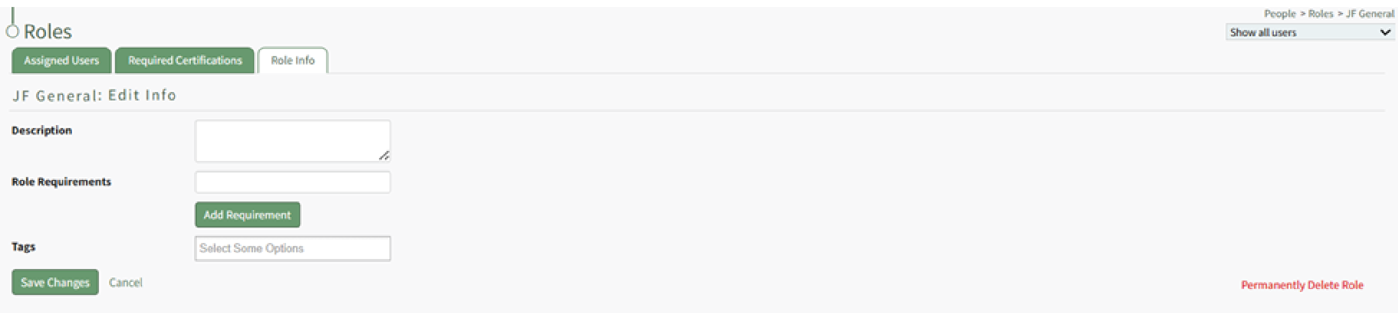
To edit the information associated with a specific certification role, select Roles in the People Module from the Main Menu to open the Certification Roles Page.



Identify the certification role whose information you wish to edit and click the “View/Edit (#)” clickable link associated with it to open a specific certification role's Details Page. Select the Role Info Tab.



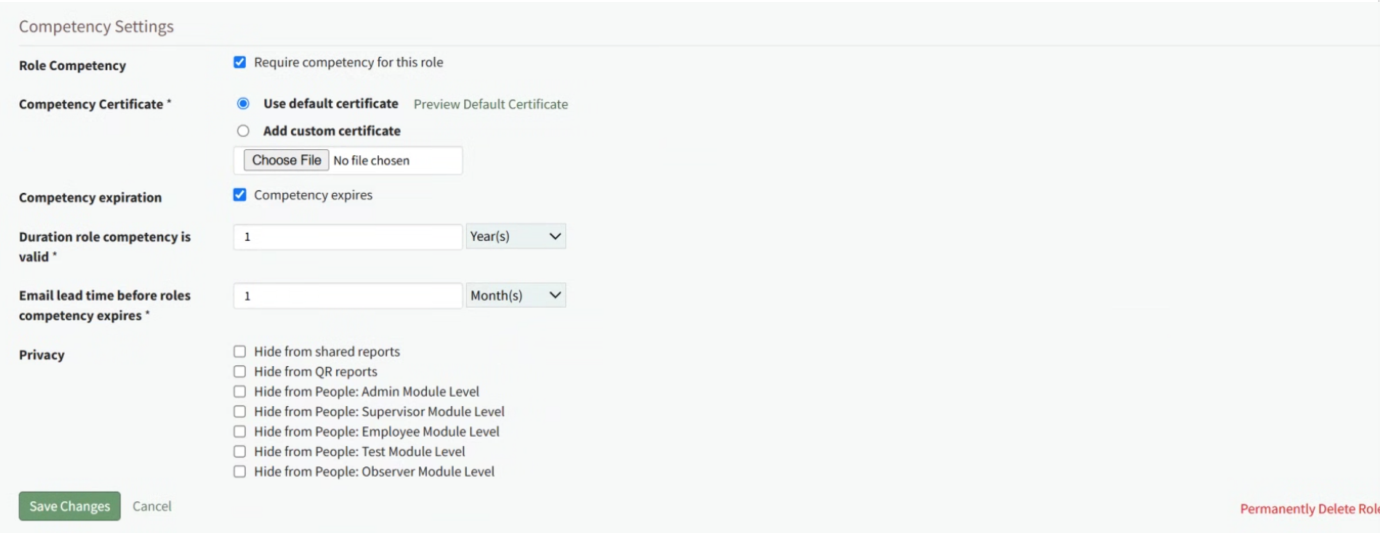
Click the “Edit Role Info” button opening the Edit Info Page allowing you to edit the certification role information specified when the certification role was created.



Alter the description, role required, tags, and/or any competency settings for the Certification Role (if competency tracking is enabled for your KAStrack installation), and then click the "Save Changes" button to return to the Role Info Tab.

How To: Define Competency Settings for a Role

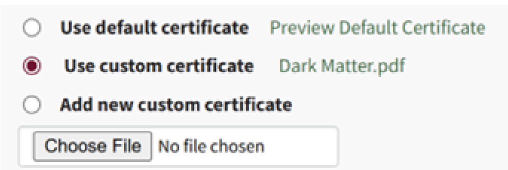
If competency tracking is enabled for your KAStrack installation, you can define the Competency Settings for a Certification Role while creating or editing the role. Competency allows your organization a way to track users' fitness / competence to be assigned to a particular role. This provides a way 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!

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