

Update Assigned Certification Records from the Matrix Table

To update assigned certification records directly from the Matrix Table, open the Matrix Page of the People Module from the Main Menu.

Matrix

People > Matrix

Show all users

Filters

Tags

Select Some Options

☒ Group accounts by supervisor

☒ Group certifications by role

☐ Hide users with no required certifications

Set Filter

Clear

Certification Legend

Valid

Due

Overdue

Expired

Not Currently Required

INH Inherited from parent

Private

Deferred/Training Legend

Days deferred or remaining in training

Search:

View Supervised Users

Curl Central

JF

Folse, Hunter

1 expired

63 expired
1 overdue

Showing 1 to 1 of 1 entries

When the Matrix Page is initially opened, it is in a collapsed view. Expand the view as need to identify the relevant user and the specific certifications whose records you wish to update. The date or statement in each cell is a clickable link that when selected opens the specific user's Certification Details Modal.

Matrix

People > Matrix

Show all users

Filters

Tags

Select Some Options

☒ Group accounts by supervisor

☒ Group certifications by role

☐ Hide users with no required certifications

Set Filter

Clear

Certification Legend

Valid

Due

Overdue

Expired

Not Currently Required

INH Inherited from parent

Private

Deferred/Training Legend

Days deferred or remaining in training

Search:

+ View Supervised Users

Curl Central

-

JF

+

Roles

Curl Central Admin

-

Certifications

Emergency Information Form

Employee Handbook

Employee I9

-

Folse, Hunter

1 expired

+>

LISTING, MEMBERSHIP

14 expired

-

> Trainer, Troy

4 expired

>>

Churchill, Winston

6/29/2024

6/29/2026

Never expires

2 expired

The date or statement in each cell is a clickable link that when selected opens the specific user's Certification Details Modal.

Winston Churchill: Emergency Information Form X

	Last Approved Certification
Certification	Emergency Information Form
Date completed (mm/dd/yyyy)	6/30/2023
Date expires (mm/dd/yyyy)	6/29/2024
Attachments	

Record Certification

The modal lists the certification name, the date completed, the date the certification expires, and any file attachment. Click the "Record Certification" button to update the assigned certification. This opens the Submit Certifications Tab on the specific individual's User Page.

User: Winston Churchill

People > Users > Winston Churchill

Show all users

Supervisor: Troy Trainer

User Certifications

Submit Certification

Manage Roles/Certifications

Winstin Churchill: Submit Certification

Select Certification *

Emergency Information Form

☒ Only show required certifications

Date completed (mm/dd/yyyy) *

Date expires (mm/dd/yyyy) *

This will turn blue on the morning of--

This will turn yellow on the morning of--

This will turn red on the morning of--

Add attachment(s)

Drop files here or click to upload

Add link

Approve Certification

Save Changes

Cancel

The certification being recorded is already indicated on the tab. Both the date completed and the date of expiration are required fields.

Date completed (mm/dd/yyyy) *	01/18/2026
Date expires (mm/dd/yyyy) *	01/17/2027
	<i>ⓘ This will turn blue on the morning of 12/28/2026</i>
	<i>ⓘ This will turn yellow on the morning of 01/11/2027</i>
	<i>ⓘ This will turn red on the morning of 01/18/2027</i>

After inputting the completion date, the system fills out the date the certification expires and includes the dates the status will change from green to blue, blue to yellow, and yellow to red. (These details are determined by the specifics associated with the certification.)

Files or links can be included with the certification record.

Select the Save Changes button. If no links or files were attached, a Certification Record Confirmation Modal appears stating, "You have not included any attachments. Do you want to submit this certification without an attachment?"

traversefences.kastrack.com says

You have not included any attachments. Do you want to submit this certification without an attachment?

Select "OK".

User: Winston Churchill

Supervisor: Troy Trainer

User Certifications

Submit Certification

Manage Roles/Certifications

Your certification has been submitted.

Your submission will be confirmed beneath the User Page tabs.

Revision #2

Created 2026-01-18 15:39:41 UTC by Mitzi Orkus

Updated 2026-06-11 15:19:40 UTC by Mitzi Orkus