

Use Attachment Inbox to Upload a File and Attach it to a Certification

To upload files in the attachment inbox and add them to user certifications, open the Submissions Page in the People Module from the Main Menu. Open the Attachment Inbox Tab.

The screenshot shows the 'Submissions' page with the 'Attachment Inbox' tab selected. The interface includes a breadcrumb trail 'People > Submissions > Attachment Inbox' and a 'Show all users' dropdown. Below the tabs, there's a large dark area with the text 'No preview available.' and a 'Drop files here or click to upload' button. To the right, there are filters for 'Account(s)' and 'Certification(s)', a checkbox for 'Only show required certifications / assigned users', and a 'Collapse All' button. A list of accounts and certifications is displayed, each with a plus sign icon to its right. At the bottom, there's a table with columns for 'Upload Date', 'Filename', and 'Uploaded By', which is currently empty with the message 'No data available in table'.

Drag and drop the desired files or click the "Drop Files Here or Click to Upload" button to upload the appropriate files.

PDF files will be visible in the preview window. Other file types can be downloaded if desired.

For flexibility, the file can be assigned to user accounts or a specified certification. Select the view best for your purposes and click the plus sign icon to the right of the account or certification to expand it.

Submissions People > Submissions > Attachment Inbox

Pending Approvals Attachment Inbox Batch Submit Certifications Show all users

Attachment Inbox

No preview available.
[Click here to download.](#)

Drop files here or click to upload

Expand Preview

Search: Show 10 entries

Upload Date	Filename	Uploaded By
2026-01-26 11:06:12	Certification Completion.docx	Orkus, Mitzi

Showing 1 to 1 of 1 entries

Previous 1 Next

Filters

Account(s) Certification(s)

☒ Only show required certifications / assigned users

Accounts Certifications Collapse All

- 11.3 Test +
- 11.7 Review +
- A DFE Course +
- A New DFE Form +
- Annual Review -

Search:

Annual Review	Completion Date	Expiration Date	Attachment(s)	Action
Demo, Dash	Nothing on file	Nothing on file		New
Employee, Cat	Nothing on file	Nothing on file		New
Employee, Dog	Nothing on file	Nothing on file		New
Supervisor, Bush	Nothing on file	Nothing on file		New
Supervisor, DFE	Nothing on file	Nothing on file		New

Approval Required +

Asset Linking +

A table shows the users assigned to the certification. Click the New button in the Action column opening the Rename Attachment Modal.

Rename Attachment: Certification Completion.docx X

Would you like to rename the file?

Certification Completion.docx

New filename:

Demo, Dash - Annual Review - Completed 2026-01-26.docx

Rename Do Not Rename Cancel

The modal renames the file according to the customizable People Module attachment naming settings, but you have the ability to edit the filename if desired.

When the Attachment Naming Settings are turned on for the Attachment Inbox, KAStack will require that every uploaded attachment be named according to a designated template within this section for organizational purposes.

To edit the attachment naming settings, open the Module Settings Tab on the Settings Page in the People Module from the Main Menu.

Settings

Module Settings | **Module Levels**

Module Settings

Notification Settings

Who receives notifications when a user certification is **submitted**?
The certified user's supervisor(s)

Who receives notifications when a user certification is **approved**?
The certified user (i.e., the user for which the certification was submitted)

Who receives notifications when a user certification is **declined**?
The certified user (i.e., the user for which the certification was submitted)

[Edit Notification Settings](#)

Attachment Naming

Turned off for Attachment Inbox

Template: #LastName# , #FirstName# - #CertificationName# - Completed #CompletionDate#

[Edit Attachment Naming Settings](#)

Select “Edit Attachment Naming Settings” to access the Edit Attachment Naming Settings Page.

Settings

Module Settings | **Module Levels**

Edit Attachment Naming Settings

Turn on/off for Attachment Inbox *

☐ On

☒ Off

Template

#LastName# , #FirstName# - #CertificationName# - Completed #CompletionDate#

[Reset to default template](#)

Template options include:
#FirstName# , #LastName# , #Username# , #CertificationName# , #ExpirationDate# ,
#CompletionDate#

[Save](#) [Cancel](#)

Selecting “On” will require that all attachments be named in a specific way, customized by the Attachment Naming Template.

The default template for Attachment Naming Settings is: Last Name, First Name, Certification Name – Completed, Completion Date

Template options include: #FirstName# , #LastName# , #Username# , #CertificationName# , #ExpirationsDate” , and “Completion Date#. These template options will fill data into the Attachment’s name based on the User Certification the Attachment is being associate with.

Customize the Naming Template to user preferences using the before/after hashtag and comma separated value format to establish recognizable computer language variables.

Select “Save” to update the Attachment Naming Settings or “Cancel” go back to the Module Settings tab on the Settings Page.

Click the Rename button, opening the Submit Certification Modal.

Dash Demo: Submit Certification

Certification

Annual Review

Date completed (mm/dd/yyyy)

Date expires (mm/dd/yyyy) *

Add attachment(s)

Drop files here or click to upload

Add link

This will turn blue on the morning of --

This will turn yellow on the morning of --

This will turn red on the morning of --

Demo, Dash - Annual Review - Completed 2026-01-26.docx (13.2 KB)

Approve Certification

Save Changes

Cancel

To submit the certification, include the date the certification was completed and select the Save Changes button.

To submit and approve the certification, include the date the certification was completed and select the Approve Certification button.

Submissions

Pending Approvals

Attachment Inbox

Batch Submit Certifications

Your certification has been approved.

Attachment Inbox

A textbox below the tabs confirms the completed action.