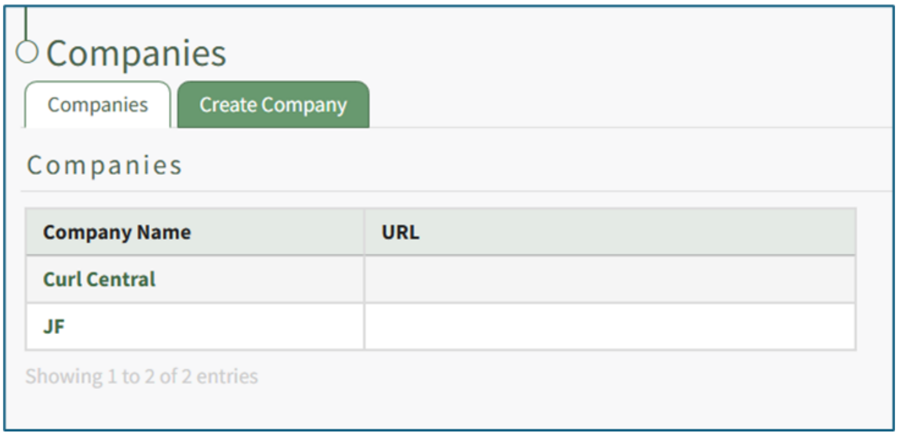
Companies Page

The Companies Page in the People Module can be accessed from the Main Menu. It is comprised of two tabs: the Companies Tab and the Create Company Tab.

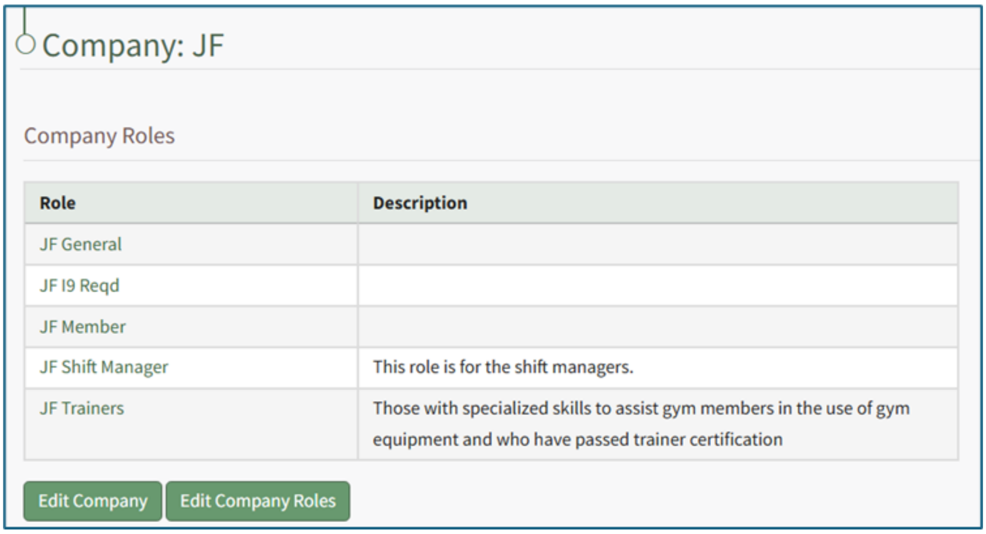
The Companies Tab on the Companies Page

The Companies Table on the Companies Page shows a list of companies that have been created, along with a clickable URL, If applicable. A URL associated with the company will display in the right column. If no URL has been added, the URL cell for that company will be blank.

> Your company may choose to use the Company table to identify locations, branches, etc. This allows the differentiation of required certifications for each unique "Company" Specific Certification Role.



Clicking on the name of a Company will open the specific company's Details Page that displays the Company Roles with any included descriptions of the Certification Roles. If no description was added, the description cell for that role will be blank.

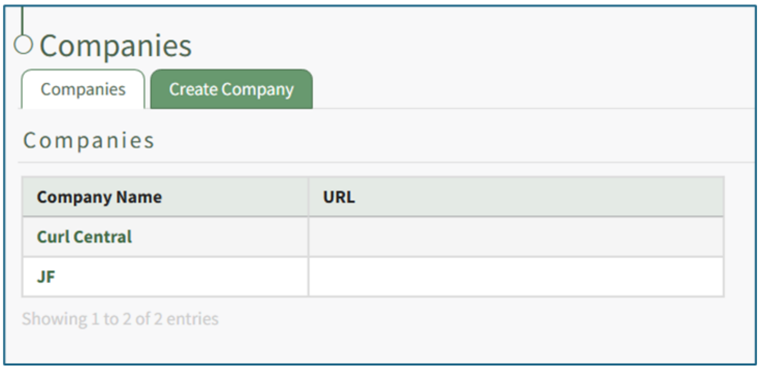


The Certification Role Name in the Company Roles Table is a clickable link that will open the Assigned Users Tab on the Roles Page.

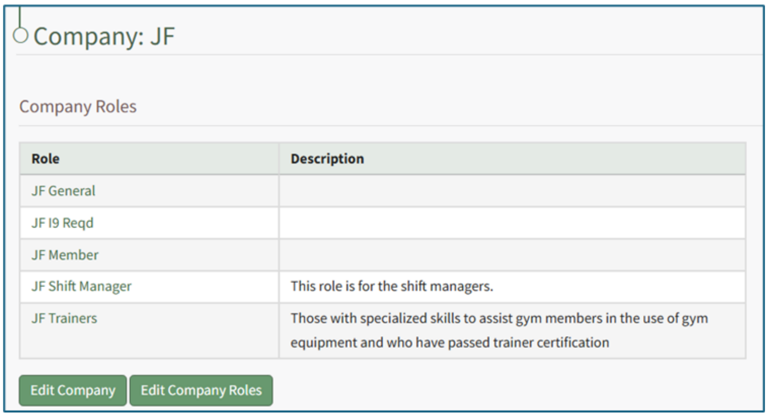
Both a company's information and company roles can be edited directly from a company's specific Details Page.

How To: Edit Company Information

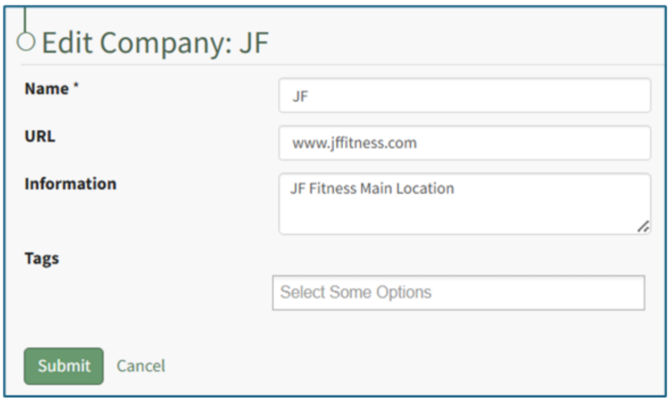
To edit company information (its name, URL link, Information, or tags), open the Companies Tab on the Companies Page in the People Module from the Main Menu.



Clicking on the name of a Company will open the company's Detail Page that displays the Company Roles with their description.

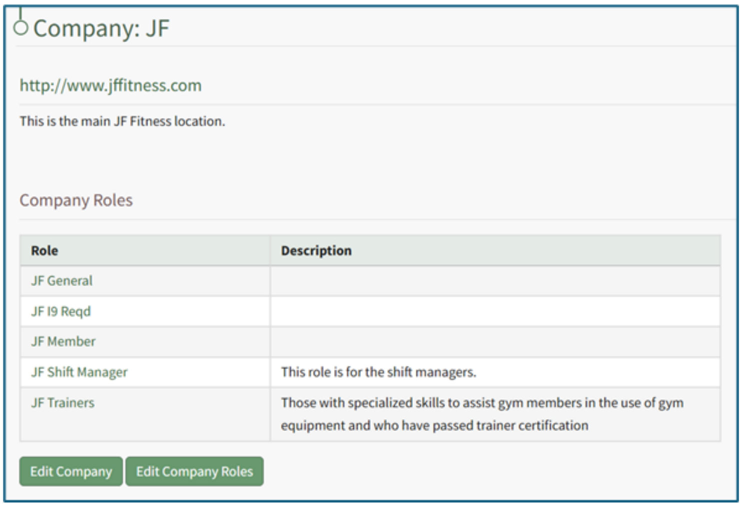


Select the “Edit Company” button to open the Edit Company: (Company Name) Page.



You can now make any desired changes to the Company Name, URL, Descriptive Information, or Tags.

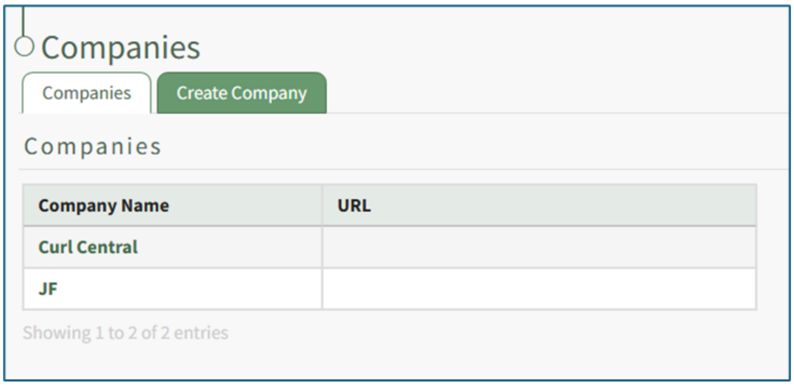
Select “Submit” to save the changes and return to the company's Detail Page with the altered inputs now showing.



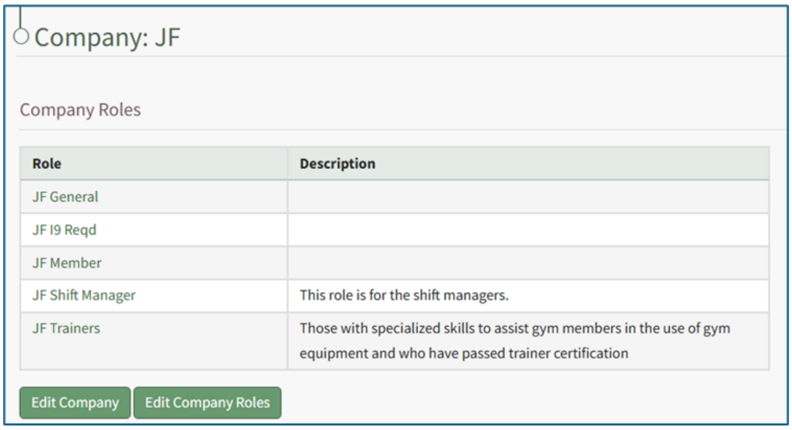
Click “Cancel” to return to the company's Detail Page without saving any changes.

How To: Delete a Company

To delete a company, open the Companies Tab on the Companies Page in the People Module.

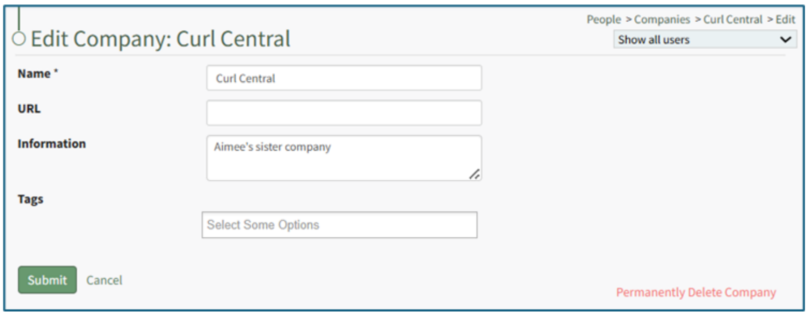


Clicking on the name of a Company will open the company's Details Page that displays the Company Roles with their description.



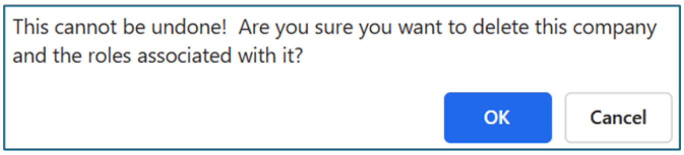
Role	Description
JF General	
JF I9 Reqd	
JF Member	
JF Shift Manager	This role is for the shift managers.
JF Trainers	Those with specialized skills to assist gym members in the use of gym equipment and who have passed trainer certification

Select the “Edit Company” button to open the Edit Company Page.



> The original company cannot be deleted. This is a system-constraint.

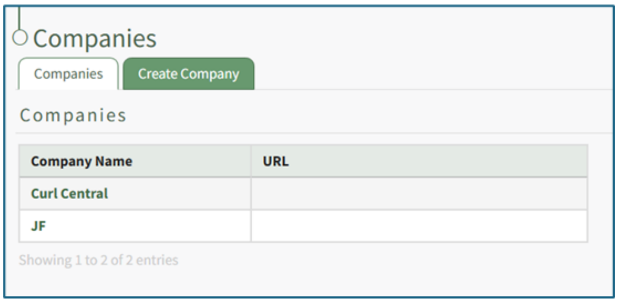
Click “Permanently Delete Company” from the bottom right-hand corner to permanently delete the company, opening a Deletion Confirmation Modal.



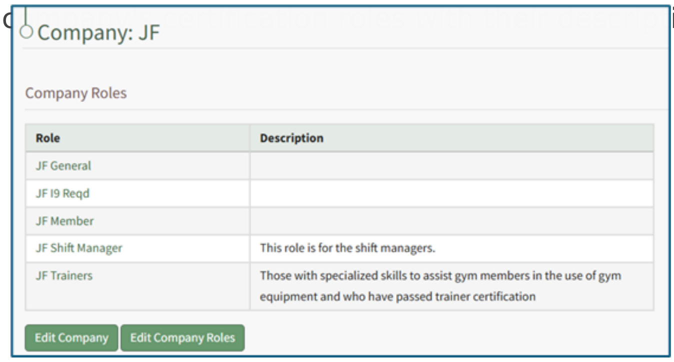
The modal states “This cannot be undone! Are you sure you want to delete this company and the roles associated with it?” Click the “OK” button to permanently delete the company.

How To: Define the Certifications Assigned to a Company's Certification Roles

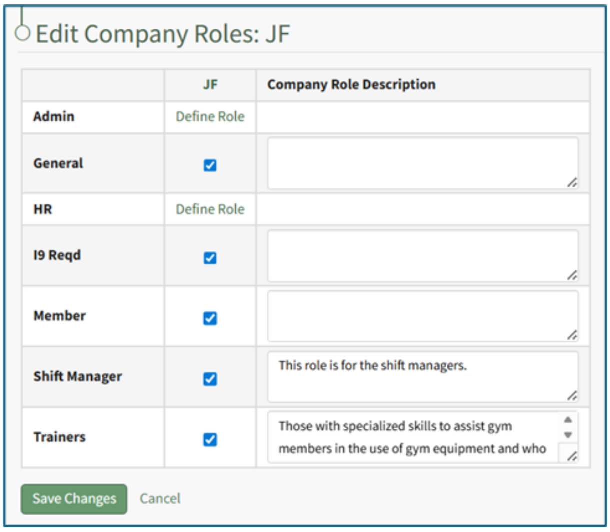
To define the certification roles associated with a specific company, select Companies in the People Module from the Main Menu opening the Companies Page. Click on the name of the company whose roles you want to define in the Companies Table.



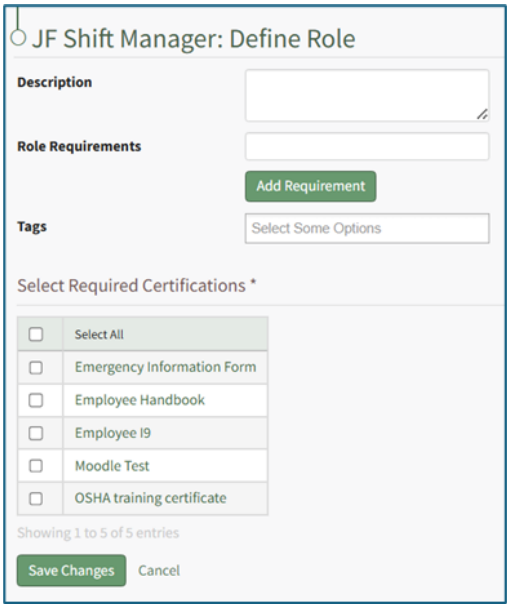
Clicking on the name of a company will open the company's Details Page that displays the c ion.



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.

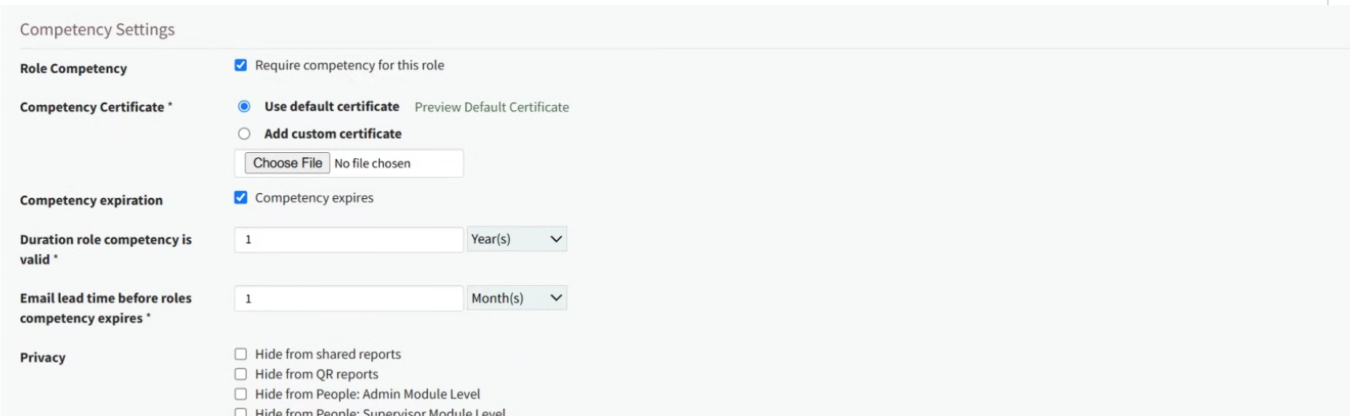
Select the desired tags for additional filters.

> 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

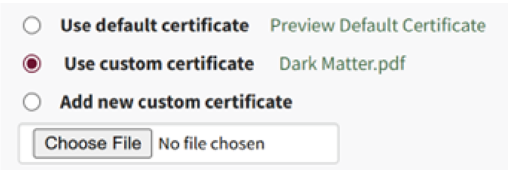
If competency tracking is enabled for your KAStrack installation, you can define the Competency Settings for a Certification Role while creating or editing the role. Competency allows your organization a way to track users’ fitness / competence to be assigned to a particular role. This provides a way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

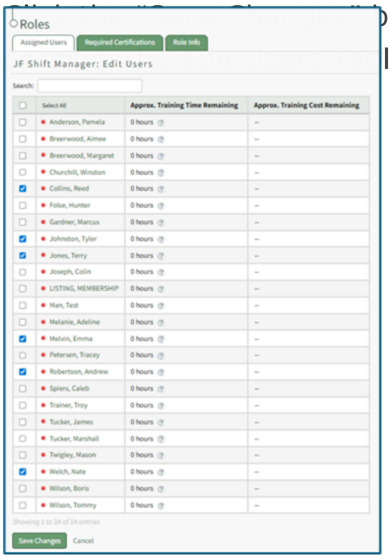
> Selecting a People Module Level in Privacy hides the Competency from users with only that Module Level. If a user has multiple People Module Levels, they may still see the Competency unless the Competency is hidden from all of those Module Levels.

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
…le of the Assigned Users Tab.

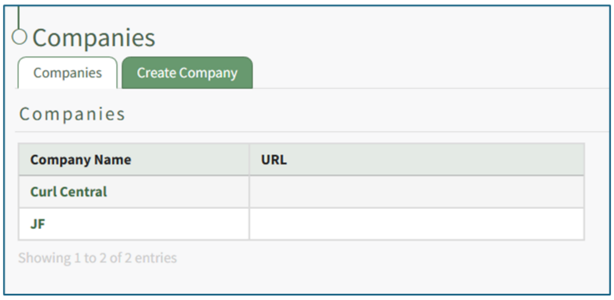


Use the checkboxes in the first column to identify the users that the new role applies to. Use the checkbox in the header row to select all available users.

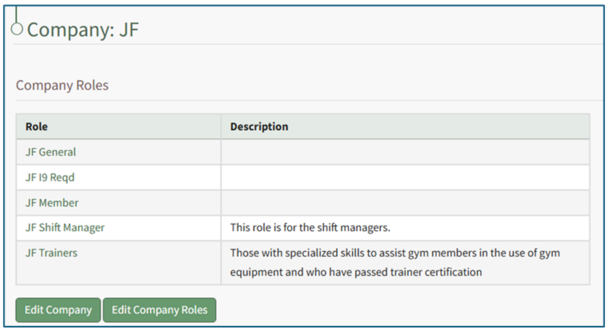
Click the “Save Changes” button and return to the Assigned Users tab.

How To: Edit a Company Specific Certification Role Description

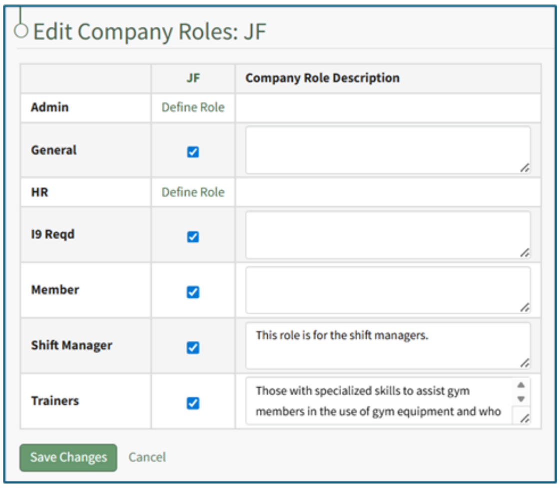
To edit a company's certification role description, select the Companies in the People Module of the Main Menu to open the Companies Page and click on the Company Name in the Companies Table. Click the name of the company whose certification role you wish to edit in the Companies Table.



Clicking on the name of a Company will open the company's Detail Page that displays the Company Roles with their description.



Select the “Edit Company Roles” button to open the Company Roles Description Table.

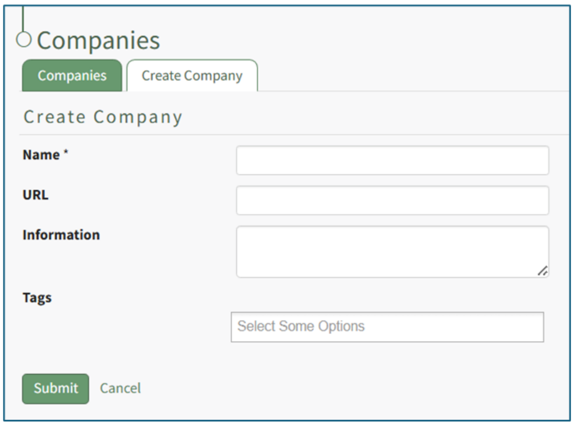


Certification roles will be listed in the first column. A checked checkbox indicates that the Certification Role has been defined and applies the company. Unchecking a checked checkbox means that this role should no longer be associated with this company. A role that is not associated with this Company will show the clickable text Define Role.

Add or alter the desired description by placing the cursor in the Role Description textbox and editing the information. Select the "Save Changes" button and return to the company's Details Page.

The Create Company Tab on the Companies Page

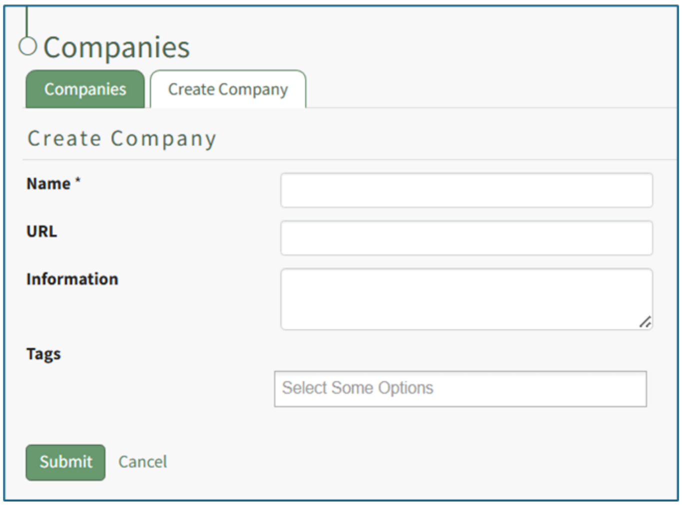
The Create Company Tab on the Companies Page allows users to create new companies directly on the tab.



After clicking the Submit button, the new company will show in the Companies Table on the Companies Page.

How To: Create a New Company

Select the Companies Page in the People Module of the Main Menu. Open the Create Company Tab.



Input the new Company name (required), an associated URL, and any descriptive information you wish to be included on the Company: (Company Name) Page.

A URL entered here will be visible on the Companies Table on the main Companies Page relative to this company. If this company has an external website / homepage, it could be listed here.

Include any tags to establish additional filters.

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

Select the “Submit” button to save the information. The new company is now visible on the Companies Tab.

Revision #5
Created 2025-12-10 17:49:44 UTC by Mitzi Orkus
Updated 2026-01-28 20:43:52 UTC by Rob Clay