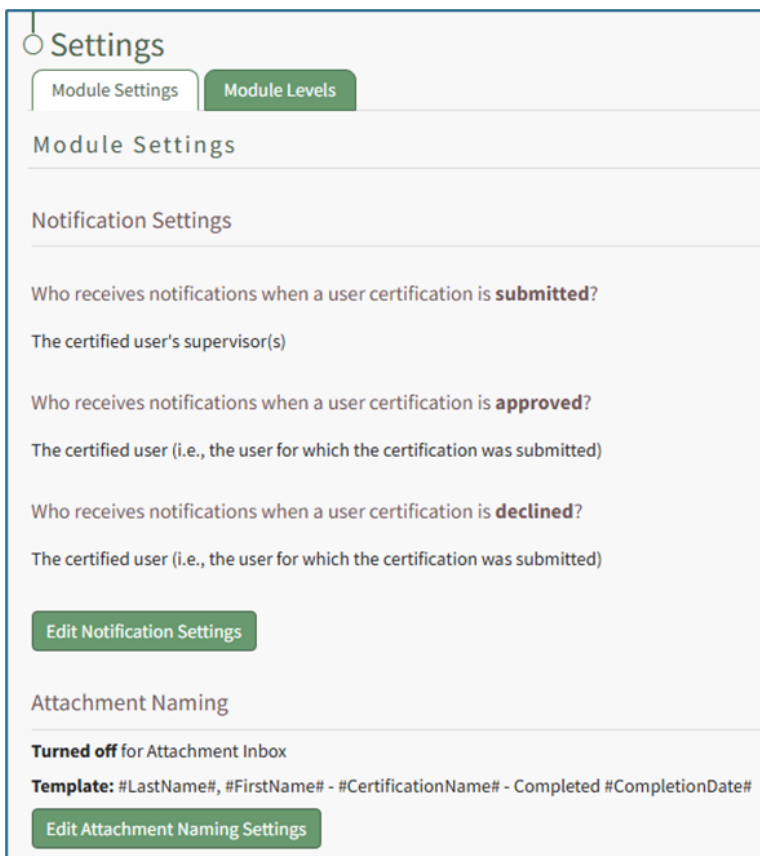


Settings Page: Module Settings and Module Levels Tabs

Module Settings Tab

The Module Settings Tab on the Settings Page of the People Module allows the user to customize KAStrack settings for certifications and attachments. It is subdivided into two sections: “Notification Settings” and “Attachment Naming.”



The screenshot shows the 'Settings' page with the 'Module Settings' tab selected. The page is divided into two main sections: 'Notification Settings' and 'Attachment Naming'. The 'Notification Settings' section contains three questions about who receives notifications for different certification statuses, with default answers provided. The 'Attachment Naming' section shows a toggle for the attachment inbox and a template for the attachment name.

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

The “Notification Settings” section displays default selections for who will receive notifications under different scenarios/conditions. KAStrack has three default system notifications settings. The system will notify the certified user’s direct supervisor when a user certification is submitted, it will notify the certified user when a user certification is approved and it will notify the certified user

when a user certification is declined.

These settings can be edited by selecting the green “Edit Notification Settings” button at the bottom of the section.

How To: Edit Notification Settings

To edit the People Module Notification Settings, open the Module Settings Tab of the Settings Page in the People Module from the Main Menu.

Click the “Edit Notifications Settings” button to access the Notifications Settings Page which offers checkbox selections for three different notification scenarios.

Settings

Module Settings Module Levels

Notification Settings

Who receives notifications when a user certification is **submitted**?

☐ The certified user (i.e., the user for which the certification was submitted)

☐ The user who submitted the certification (e.g. the certified user, a supervisor, an admin, etc.)

☒ The certified user's supervisor(s)

☐ Other user(s)

Who receives notifications when a user certification is **approved**?

☒ The certified user (i.e., the user for which the certification was submitted)

☐ The user who submitted the certification (e.g. the certified user, a supervisor, an admin, etc.)

☐ The certified user's supervisor(s)

☐ Other user(s)

Who receives notifications when a user certification is **declined**?

☒ The certified user (i.e., the user for which the certification was submitted)

☐ The user who submitted the certification (e.g. the certified user, a supervisor, an admin, etc.)

☐ The certified user's supervisor(s)

☐ Other user(s)

Save Cancel

A user has the ability to customize who is notified when a user certification is submitted, when a user certification is approved, and when a user certification is declined.

There are four checkboxes for each of the three previous scenarios:

1. The certified user (the user who completed the certification)
2. The user who submitted the certification (could refer to the certified user, a supervisor, or and/or an administrator depending on the company's certification submission procedures)
3. The certified user's supervisor(s) (refers to the individual's direct supervisor)
4. Other user(s) (allows for the selection of any user in the KAStrack system from a dropdown menu)

Multiple, all, or none of the checkboxes can be selected.

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

The “Attachment Naming” section allows the user to customize how attachments are named. This can be useful when batch uploading files with file names that don’t adequately indicate what the document is / relates to.

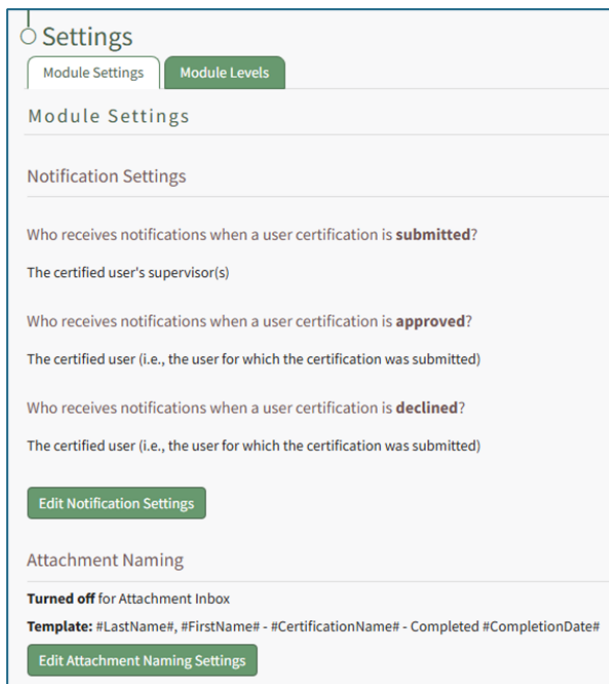
When this feature is turned on, KAStrack will require that every uploaded attachment be named according to the designated template within this module for organizational purposes.

The default template for Attachment Naming Settings is Last Name, First Name, Certification Name – Completed, Completion Date, however this can be customized to your organization's preferences.

How To: Edit Attachment Naming Settings for the People Module

When the Attachment Naming Settings are turned on for the Attachment Inbox, KAStrack 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. 



The screenshot shows the 'Settings' page for the 'People' module. At the top, there are two tabs: 'Module Settings' (active) and 'Module Levels'. Below the tabs, the 'Module Settings' section is displayed. It includes a 'Notification Settings' section with three questions about who receives notifications for 'submitted', 'approved', and 'declined' certifications, each with a dropdown menu for selection. Below this is an 'Edit Notification Settings' button. The 'Attachment Naming' section is also visible, showing a toggle switch that is currently 'Turned off for Attachment Inbox' and a text field for the template, which contains the default: '#LastName# - #FirstName# - #CertificationName# - Completed #CompletionDate#'. An 'Edit Attachment Naming Settings' button is located at the bottom of this section.

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

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.

Module Levels Tab

The Module Levels Tab of Settings Page can be accessed from the Main Menu. The system default module levels for the module are visible in the Module Levels Table. New module levels with customizable permissions can be created and managed on this tab.

Settings

People > Settings > Module Levels

Show all users

Module SettingsModule Levels

Module Levels

Search:

Module Level Name	View	Edit
Volunteer	View	Edit
Observer	View	
Employee	View	
Supervisor	View	
Admin	View	

Showing 1 to 5 of 5 entries

Create People Module Level

There are four system default module levels associated with the People Module. An explanation of the permissions associated with each default module level are shown in the People Module Level Permissions Table below.

System default module levels cannot be customized.

People Module Level Permissions Table	
Module Level	Permissions
Observer	Can create, delete and share reports; can view associated roles and users for certifications, can view all certification roles; can view all assessments
Employee	Can submit certifications, can submit competency certificates, include users with this level on reports, can view all assessments

Supervisor	Can submit certifications; Can edit/delete my comments on a user certification that has been approved; Can submit competency certificates; can submit and delete assessments; can approve and delete certifications; can approve and delete competency certificates; include users with this level on reports; can create, delete, and share reports; can submit certifications; can submit competency certificates; can approve and delete competency certificates; can edit user tags; can assign user to certification roles; can manage report visibility; can view associated roles and users for certifications; can edit certification info; can create or delete certifications; can view all certification roles; can edit certification roles; can create and delete certification roles; can view all assessments
Admin	Can submit certifications; Can edit/delete my comments on a user certification that has been approved; Can submit competency certificates; can submit and delete assessments; can approve and delete certifications; can approve and delete competency certificates; can create, delete, and share reports; can submit certifications; can submit competency certificates; can approve and delete competency certificates; can edit user tags; can assign user to certification roles; can manage report visibility; can edit training courses; can edit notification settings; can view associated roles and users for certifications; can edit certification info; can create or delete certifications; can batch submit for any accessible certification; can view all certification roles; can edit certification roles; can create and delete certification roles; can view all assessments; can edit assessments; can create and delete assessments

New Module Levels can be created in order to customize module level permissions to suit your organization's needs.

How To: Create a New Module Level (People Module)

To create a new Module Level in the People Module, select the Module Levels Tab on the Settings Page in the People Module on the Main Menu.

Module Levels

Search:

Module Level Name ↑↓	View ↑↓	Edit ↑↓
Observer	View	
Employee	View	
Supervisor	View	
Admin	View	

Showing 1 to 4 of 4 entries

Create People Module Level

Select the “Create People Module Level” button opening the Create People Module Level Page.

Input the new Module Level Name and select the permissions for the new user group by selecting the desired checkboxes. A comprehensive list of permissions is shown in the table below.

People Module Possible Permissions Organized by Permission Category	
Permission Category	Possible Permissions
My Account	☐ Can submit certifications ☐ Can edit/delete my comments on a user certification that has been approved ☐ Can submit competency certificates ☐ Can submit and delete assessments ☐ Can approve and delete certifications ☐ Can approve and delete competency certificates
Reports	☐ Include users with this level on reports ? ☐ Can create, delete, and share reports ?
Non-Supervised Users	☐ Can submit certifications ☐ Can edit/delete comments on certifications ☐ Can submit competency certificates ☐ Can submit and delete assessments ☐ Can approve and delete certifications ☐ Can approve and delete competency certificates ☐ Can edit user tags ☐ Can assign user to certification roles ☐ Can manage report visibility

Supervised User	☐ Can submit certifications ☐ Can edit/delete comments on certifications ☐ Can submit competency certificates ☐ Can submit and delete assessments ☐ Can approve and delete certifications ☐ Can approve and delete competency certificates ☐ Can edit user tags ☐ Can assign user to certification roles ☐ Can manage report visibility
Administration	☐ Can edit training courses ☐ Can edit notification settings
General Permissions	☐ Can view associated roles and users for certifications ☐ Can edit certification info ☐ Can create or delete certifications ☐ Can batch submit for any accessible certification ☐ Can view all certification roles ☐ Can edit certification roles ☐ Can create and delete certification roles ☐ Can view all assessments ☐ Can edit assessments ☐ Can create and delete assessments

A list of the module level hierarchy is provided at the bottom of this screen.

Level hierarchy

⋮ Admin

⋮ Supervisor

⋮ Employee

⋮ Observer

⋮ New Level

Create People Module Level

Cancel

The different module levels can be dragged and dropped as needed in order to quickly and accurately organize as desired.

If a module level permission is included with the associated module level, it displays in black font with a check mark to the left of the permission. If the permission is not included, it displays in gray font with a line strikethrough and no check mark.

Reports

include users with this level on reports ?

✓ Can create, delete, and share reports ?

If the Reports permission “Include users with this level on reports” is given, then users assigned this permission will appear in the matrix, on e-mail reports, and in shared reports. If the Reports permission “Can create, delete, and share reports” is given, the permission includes supervisor and shared reports.

A complete list of all permissions associated with the People Module have been provided in the table below.

People Module Permissions Table	
Permission Category	Possible Permissions
My Account	☐ Can submit certifications ☐ Can edit/delete my comments on a user certification that has been approved ☐ Can submit competency certificates ☐ Can submit and delete assessments ☐ Can approve and delete certifications ☐ Can approve and delete competency certificates
Reports	☐ Include users with this level on reports  ☐ Can create, delete, and share reports 
Non-Supervised Users	☐ Can submit certifications ☐ Can edit/delete comments on certifications ☐ Can submit competency certificates ☐ Can submit and delete assessments ☐ Can approve and delete certifications ☐ Can approve and delete competency certificates ☐ Can edit user tags ☐ Can assign user to certification roles ☐ Can manage report visibility
Supervised User	☐ Can submit certifications ☐ Can edit/delete comments on certifications ☐ Can submit competency certificates ☐ Can submit and delete assessments ☐ Can approve and delete certifications ☐ Can approve and delete competency certificates ☐ Can edit user tags ☐ Can assign user to certification roles ☐ Can manage report visibility
Administration	☐ Can edit training courses ☐ Can edit notification settings

General Permissions	☐ Can view associated roles and users for certifications ☐ Can edit certification info ☐ Can create or delete certifications ☐ Can batch submit for any accessible certification ☐ Can view all certification roles ☐ Can edit certification roles ☐ Can create and delete certification roles ☐ Can view all assessments ☐ Can edit assessments ☐ Can create and delete assessments
---------------------	--

Revision #7
Created 2025-12-10 17:50:33 UTC by Mitzi Orkus
Updated 2026-06-10 16:55:07 UTC by Mitzi Orkus