How To Hyperlink Glossary (organized by Module)

Accounts Module

Add an Access Level for an Individual

Archive a User Account

Bulk Import Account Information

Create a New Channel

Create a New Module Level (Accounts Module)

Customize Your Default KAStrack Login Screen

Deactivate a User Account

Delete a Channel

Edit a Channel

Edit an Employee's Supervisor

Edit Account Field Restrictions for Customized Module Levels

Edit Your Individual Email Alert Preferences

Edit Your Individual Email Report Preferences

Edit Your Personal Account Info

Export User Account Information

Manually Approve/Deny User Registrations

Create an Individual New Account

Permanently Delete a User Account

Reactivate a Deactivated Account

Reset the Password for Another User

Reset Your Own Password

Restore an Archived User Account

Actions Module

Add A Budget Alert for an Action Group

Add a Budget Approver Group in the Actions Module

Add Actions to an Action Group Template

Add Comments to an Action

Archive an Action Group

Assign an Action

Assign an Action Approver

Assign Interested Parties to an Action

Bulk Edit Selected Actions

Copy a Workflow

Copy an Action Group Template

Create a New Action

Create a New Actions Group

Create a New Budget Approver Group

Create A New Action Group Template

Create New Module Levels

Create New Workflow

Delete a Budget Approver Group

Delete a Workflow

Delete an Action

Delete an Action Comment

Delete an Action Group

Delete an Action Group Template

Edit a Workflow

Edit An Action Group

Edit An Action Group Template

Edit an Existing Action

Edit an Action Group Status

Export Action Groups in a .csv File

Import Bulk Actions

Upload Files to An Action

Assets Module

Access an Asset's PDF Data Sheet

Access an Asset's QR Code

Add a Meter to an Asset

Add a New Manufacturer

Add Components to a Parent Asset

Add Fields to an Asset Type

Add Interim Notes to a Task without Completion

Add Meters to a Task Template

Add Tasks to a Task Template

Apply a Task Template to the Task Schedule

Archive an Asset or Component

Assign / Unassign Users and Certification Roles to an Asset

Attach an Asset Library File to an Asset

Bulk Assign / Unassign Assets

Bulk Import Asset Information

Bulk Export Asset Information

Change a Manufacturer's Name

Change a Task Template Name

Change an Asset Type Name

Clean Manufacturers

Copy and Rename a Task

Copy and Rename a Task Template

Copy and Rename an Asset

Create a Meter Type

Create a New Asset

Create a New Asset Type

Create a New Task on a Task Schedule

Create a New Task Schedule Template

Create a Permissive Task Group

Create an Asset

Create New Module Levels (Assets Module)

Customize Trigger Settings Based on an On Expiry Period

Customize Trigger Settings Based on Pre-Existing Tasks

Customize Trigger Settings with a Generate Every Period

Customize Trigger Settings with a One Time Period

Customize Trigger Settings with an Every Period

Customize Trigger Settings with an Every (strict) Period

Delete a File Attached to a Task

Delete a File from the File Library

Defer a Task

Delete a Manufacturer

Delete a Meter Type

Delete a Task

Delete a Task Template

Delete an Asset or Component

Delete an Asset Type

Delete an Asset Type Field

Delete Historical Task Records

Delete Multiple Tasks Simultaneously on the Task Schedule

Display Select Tasks in the Task Schedule Table

Download a File Attached to a Task

Download a File from the Asset File Library

Download Historical Task Attachments

Edit a File's Details in the File Library

Edit a Meter Type

Edit a Task

Edit an Asset

Edit an Asset Type Field

Edit the Date / Time of Task Completion for Historical Tasks

Log Asset Data

Log a Task has been Completed

Mark an Asset as Out of Service

Mark Multiple Tasks as Complete on the Task Schedule

Move an Asset/Component to Another Asset/Component

Navigate the Task Log History Page

Record a Fault

Refresh the Task Schedule Table

Return an Out of Service Asset to Service

Run an Asset Report

Run Reports on Historical Task Data

Upload a File to an Asset

Upload a Task File

Upload Files to a Task after a Task has been Completed

View a Manufacturer's Key Information

View a Meter Type's Key Information

View Additional Notes Associated with a Task

View All Component's on an Asset's Task Schedule Page

View an Asset's Components

View an Asset's Cost / Time Summary

View an Asset's Historical Logs

View an Asset's Summary Modal

View an Asset's Task Schedule

View Files Associated with an Asset/Component

View Historical Logs for a Specified Task

View Interim Notes Associated with Historical Tasks

View Task Details

View a File Attached to a Task

View an Asset Type's Key Information

View the Details of a File in the File Library

View the Fields associated with an Asset Type

Attendance Module

Create the Base Form for an Attendance Log

Create an Attendance Log

Activate Muster Mode for a Drill

Activate Muster Mode for an Emergency

Copy an Attendance Log URL Link

Download / Copy an Attendance Log QR Code

Create a Custom Date/Time Format for an Attendance Log

Create a New Module Level (Attendance Module)

Deactivate Muster Mode

Delete an Attendance Log

Delete an Individual Attendance Log Entry

Edit the Admittance Desk Page

Edit the Columns on the All Entries Page Table

Edit the Columns on the Currently Signed In Page Table

Edit the Columns on the Muster History Page

Edit the Columns that Show when Mustering

Edit the Display Page

Enable the Admittance Desk Page

Enable the Display Page

Generate a Time On Site Summary Report

Make Entries Prior to a Date/Time as Signed Out

Mark Individuals Signed In Prior to A Certain Date/Time as Accounted For While in Muster Mode

Refresh the Currently Signed In Table

Refresh the Muster Table while in Muster Mode

Show an Attendance Log on the Main Menu

Sign Out an Individual

Sign Out Individuals when In Muster Mode

Sign Out Other Individuals (In Bulk)

Calendar Module

Create a New Calendar Event

Create a New Calendar Filter

Create a New Module Level (Calendar Module)

Delete a Calendar Filter

Edit a Calendar Filter

Communications Module

Apply a Notification Template to Existing Accounts

Attach a Documents Module File to a System Message

Attach a File to a System Message

Copy a QR Code

Copy a QR Code's Destination URL Link

Create a Custom QR Code

Create a New Communications Templates

Create a New Module Level (Communications Module)

Create a New Notification Template

Delete a QR Code

Download an Individual QR Code

Manage QR Codes in Bulk

Download QR Code Hits Data in a CSV File

Edit a QR Code

Edit Email Report / Alert Notification Settings for Existing Accounts

Edit New User Notification Templates

Reset the Hit Count on a QR Code

Send an Email in KAStrack

Set Up Additional Account Fields for Email Settings

Use a Communications Template when Sending A System Message

View a Custom QR Code

Courses Module

Access a Course's Details Page

Access a Specific Page in a Course

Access Course Stats

Add a Documents/Video to a Course Page

Add a Question to a Course Page

Add a Section to a Course

Add Custom Course Content

Add Pages in a Course

Add Pages to a New Section

Add Question Groups to a Course Page

Copy a Course Page

Create a New Course

Create a New Module Level (Courses Module)

Delete a Course

Delete a Page

Edit a Specific Page in a Course

Edit Course Properties

Edit Page Properties

Edit the Order of Pages in a Course

Preview an Individual Page in a Course

Set Up A Course As A Certification

Take a Course In Test Mode

Upload a Video / Document in a Course

Dashboard Module

Edit a Dashboard

Create a New Dashboard

Add a Module Summary Widget to the Dashboard

Add Forms to the Forms Module Summary Widget

Create a Chart Widget

Create a Speed Dial

Edit a Speed Dial

Delete a Speed Dial

Unpin a Widget or Speed Dial from the Dashboard

Database Module

Add a Database Field

Add a Database Group

Add a Database Rule

Add a New Module Level (Database Module)

Add an Individual Database Entry

Add Tags to a Database Entry

Bulk Edit / Delete Database Entries

Copy a Database

Create a Database

Delete a Database

Delete a Database Entry

Delete Database Groups

Edit a Database

Edit a Database Entry

Edit a Database Group's Name and Description

Edit the Status of a Database Rule

Export Database Entries

Import Database Entries from a CSV

Import Fields from a CSV File

Import Fields from a PDF Field Import

Place Databases into Groups

Dispatch Module

Access a Dispatch Log

Access a Dispatch QR Code

Add a Waypoint to an Itinerary

Add an Activity to a Dispatch Itinerary

Add Approvers to a Dispatch

Add Assets to a Dispatch

Add Certifications to a Dispatch

Add Dispatch Locations to the Locations Database Form

Add Distribution Lists to a Dispatch

Add Form Entries to a Dispatch

Add Forms to a Dispatch

Add KAStrack Documents Module Files to a Dispatch

Add Notes to a Dispatch

Add People to a Dispatch

Add Reports to a Dispatch

Add Tags to a Dispatch

Approve a Pending Dispatch Status Change

Change the Dispatch Status

Create a Footer for a Dispatch Distribution List

Create a New Dispatch

Create a New Module Level (Dispatch Module)

Create a Pre-Defined Distribution List

Delete a Dispatch

Delete a Dispatch Attachment

Delete a Distribution List

Edit a Dispatch

Edit a Dispatch Attachment

Edit a Pre-Defined Distribution List

Edit Users and Certification Roles Available as Dispatch Approvers

Give Default Permission to Approve all Incidents

Include Document Attachments in Dispatch Orders

Indicate a Dispatch Incident

Send a Dispatch Order via Email

Show Individual Form Entries on a Dispatch

Update Estimated Activity Status with Actual Date / Time

Update Waypoint Arrival/Departure Status

Upload a File as a Dispatch Document

View a Dispatch Log

View a Dispatch Order

View the Dispatch Orders PDF

Documents Module

Access A File's QR Code / URL Link

Access A Folder's QR Code / Link

Acknowledge a Document/File

Add Comments to a File

Add Tags to a Folder

Affirm a Document/File's Suitability

Approve a File Submitted for Review

Create a New Folder

Create a New Module Level (Documents Module)

Decline Approval of a File Submitted for Review

Delete a Folder

Designate a File is Public

Designate a Folder is Public

Download a Folder

Download all Files Requiring Action

Edit the Title of a Folder

Move a File/Folder

Publish a Document/File

Reject a Document/File and Prevent Publishing

Reset the Since Last Review Document List

Review New File Revisions when Notified

Search all Documents Updated after a Selected Date

Send an Acknowledgment Reminder Alert for a Document/File

Specify Who Should Receive Notifications of New File Revisions

Upload New Documents/Files

Upload a Revised Version of an Existing File

View a File's History

View Actions Associated with a Document

Finance Module

Access a Budget Item Attachment

Add A Budget Alert

Add a Budget Item

Add a New Budget

Approve / Reject a Budget Item

Archive a Budget

Close a Budget

Create a New Module Level (Finance Module)

Edit a Budget

Edit a Budget Alert

Edit a Budget Item After Submission for Approval

Resubmit a Budget Item form Approval after Edits are Made

Set / Edit a Budget's Approvers and Approval Notifications

Submit a Budget Item for Approval

Unlock a Submitted Budget Item for Editing

Forms Module

Access a Form's Shareable URL Link / QR Code

Add a Field to a Form

Add a Forms Group

Add a New Module Level (Forms Module)

Add an Individual Form Entry

Add Forms to a Group

Add Tags to a Form Entry

Approve a Form Entry Pending Approval

Archive a Form

Bulk Edit / Delete Form Entries

Clear a PDF Cache

Close a Form

Convert a Database to a Form

Copy a Form

Create a Form

Create a Form Aggregation

Create a New Form Field Rule

Delete a Form

Delete a Form Aggregation

Delete a Form Entry

Delete a Forms Group

Delete all Testing Entries

Download a PDF Form

Edit a Form

Edit a Form Aggregation

Edit a Form Entry

Edit a Form Entry Pending Approval

Edit a Forms Groups

Edit the Status of a Form Rule

Export Form Entries

Import Fields from a PDF Field Import

Import Form Fields from a CSV File

Import Form Entries from a CSV File

Integrate Another Module Into a Form

Make a Form Live

Reject a Form Entry Pending Approval

Require Form Entry Approval

Submit Entries Using a PDF

Upload a PDF Form (after Fields have been created)

Integrations Module

Create an External Link within Integrations

Edit an External Link within Integrations

Delete an External Link within Integrations

Inventory Module

Add a Stock Item to the Inventory

Add a Unique Item to the Inventory

Add an Inventory Location

Create a Stock Database

Create a Unique Items Database

Create an Inventory from Scratch

Create Module Levels (Inventory Module)

Delete an Inventory

Edit an Inventory

Integrate a Database with the Inventory Module

Return a Unique Item to the Inventory

People Module

Access a User's Roles and Certifications Report QR Code

Acknowledge a Document/Video Associated with a Required Certification

Add Comments to a User's Submitted Certification

Add Multiple Required Users to a Certification

Approve a Certification Submitted for Approval

Approve a Submitted Certification Pending Approval

Approve Multiple Certifications Submitted for Approval by a Specific User

Assign a Certification Role to Multiple Users at Once

Assign a Certification Role_Individually

Assign Candidate Users to a Certification Role

Assign Certifications to a User Independent of a Required Certification Role

Assign Users to a Certification Independent of a Required Certification Role

Attach a File or Link to a User's Certification

Batch Submit Certifications in Bulk

Complete a Form Associated with a Required Certification

Complete Payment for a Required Certification

Certify Certifications/Competencies_Supervisor Report Table

Create a Certification

Create a New Company

Create a New Module Level (People Module)

Create a Shared Certifications Report

Create, Define, and Assign Users to a New Certification Role

Decline a Submitted Certification Pending Approval

Defer a Certification for a Specified User

Define Competency Settings for a Role

Define the Certifications Assigned to a Company's Certification Roles

Delete a Certification Role

Delete a Company

Delete a Certification

Delete a Shared Certifications Report

Designate that an Employee is in Training_User Page

Edit a Supervised User's Account Information from the People Module

Edit a User's Certification Completion/Expiration Dates

Edit Company Information

Edit Attachment Naming Settings for the People Module

Edit Certification Role Information

Edit a Company Specific Certification Role Description

Edit Notification Settings

Edit Required Certifications for a Certifications Role

Edit Role Information or Permanently Delete a Role

Edit the Roles Associated with a Certification

Export User Certifications

Export Roles/Certification Assignments

Export User Certifications

Import User Certifications

Import Certification Roles

Import Certifications

Indicate a Required Certification Cannot be Deferred

Indicate a Required Certification is Not Applicable to a Specified User

Make a Hidden User a Visible User on the Users Table

Designate an Individual a Hidden User on the Users Table

Record a New Competency Certificate

Remove a Certification Role from a Company

Reset a User's Roles and Certifications Report QR Code

Send an Email Notification Regarding a Certification

Send a Shared Certifications Report via Email

Set an Employee Certification as Not Applicable / Defer Temporarily

Submit a Required Certification

Submit Certifications/Competencies from the Supervisor Report Table

Take a Course Associated with a Required Certification

Update Assigned Certification Records from the Matrix Table

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

View a User's Certification History Modal

View a User's Roles and Certifications Report

Reports Module

Add a Module Level (Reports Module)

Assign Permissions to a Custom Report

Assign Permissions for a System Report

Copy a Report

Create a Chart

Create a Custom Report

Delete a Chart

Delete a Report

Download a Report

Edit a Chart

Edit a Report

Import KAStrack Report Data into Microsoft's Power BI

Include Dynamic Restrictions on a Custom Report

Run a Report

Site Settings Module

Assign Remote Access Profiles

Create a Customized Access Level

Create Payment Configuration Using Stripe

Create Registration Profiles

Delete a Customized Access Level

Edit a Customized Access Level

Edit Company Info

Edit Email Settings

Edit Password Requirements

Edit the Accounts Module Active Accounts Table

Edit the Accounts Module Archived Accounts Table

Edit the Accounts Module Pending Registrations Table

Edit the Finance Module Active Budgets Table

Edit the Finance Module Budget Items Per Budget Table

Edit the People Module Users Assigned to a Role Table

Edit the People Module Users Associated with a Certification Table

Edit the People Module Users Table

Export Registration Profiles

Import Registration Profiles

Tags Module

[Create a New Module Level (Tags Module)]

[Create a New Tag Category]

[Create a New Tag from an Entity in Another Module]

[Create a New Tag in the Tags Module]

[Delete a Category]

[Delete a Tag]

[Edit a Category]

[Edit a Tag]

Revision #52
Created 2026-01-24 22:12:49 UTC by Mitzi Orkus
Updated 2026-10-22 22:36:58 UTC by Mitzi Orkus