

Documents: Introduction

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Documents Module Summary

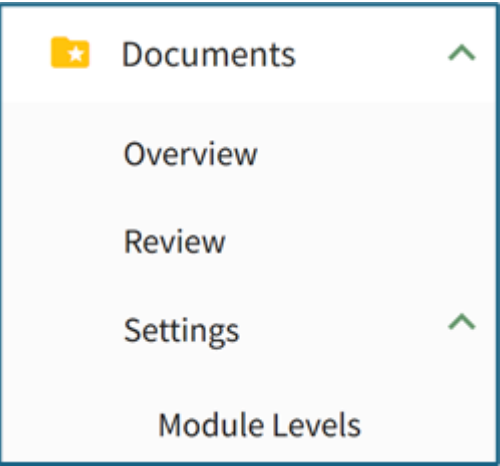
The Documents Module is a repository where all company files can be uploaded, stored, and managed. This module can track a company’s workforce acknowledgement of documents for workforce assurance and automate acknowledgment management for revised document updates. Additionally, the documents module automates annual suitability reviews and management of change.

The following file types can be previewed directly within the module without needing to download them first: .jpg, .jpeg, .webp, .gif, .bmp, .svg, .png, .mp4, .webm, .ogg, and .pdf.

For .url files, KAStrack will display the hyperlink instead of a preview. The viewer is feature rich for PDFs.

All filetypes can be uploaded to KAStrack, but the ones listed above may be viewed without being downloaded.

Files associated with and uploaded within the following Modules are not automatically saved in the Documents Module, but they can be manually uploaded in both: Assets, Courses, Dispatch, Forms, and People. Files uploaded into the Grid Module will automatically be housed in Documents.



The table below provides a summary of each page in the Documents Module.

Documents Module Main Menu Page Summaries	
Page	Explanation
Overview	The Overview Page is the Documents Module homepage, where all files and folders are located.

Review	The Documents Review page has three tabular sub-pages: Review, Notifications, and Updates. The user can select between the three tabs below the Review Page header to manage file approvals, acknowledgements, and continued suitability, as well as monitor any pertinent Document updates and notifications.
Settings	The Settings Page allows the user to customize and designate permissions for the Documents Module.

Folder and File Context Menu Explanations

Each folder and file within the Documents Module will have a context menu associated with it that links to actions.

Folder Context Menu Explanations	
Option	Explanation
Edit	Selecting “Edit” opens the Edit Folder modal, allowing the user to update the folder title, tags, and establish if the folder should be set as pubic.
Defaults	“Defaults” is a dropdown menu option for Folders only. Clicking “Defaults” will open the Defaults for New Documents Modal, which allows the user to make customized settings for bulk uploads. The user enters a title pre-fix instead of a title for bulk uploads.
Move To	Selecting “Move To” opens a modal that allows the user to move a folder from its current location to another.
Delete	Selecting “Delete” from the dropdown menu for a folder opens a Delete Folder modal that will ask the user to confirm that they want to delete the folder, including all the files, folders, and subfolders stored in the parent folder.
QR Code / Link	Selecting “QR Code / Link” on the dropdown menu opens the Direct Access Modal for individual folders. Direct access Company Policies  https://browserrefocus.katback.com/iddocuments/folder/2 COPY URL COPY QR QR CREATE SHORTLINK For direct access you can use the following QR Code or URL. Access will only be given to users who have permission to view the document / folder. CODE The user can use either the URL or QR Code to share access to the folders selected. Access will be given to internal users who have permission to view the folder. Access will be given to external users if the folder is public.

Download	Selecting “Download” on the context menu for a folder opens the Download Modal, allowing the user to download all of the files located in the folder selected and the subfolders held within. Download (1)  389KB https://traversefences.kastrack.com/documents/download/bulk/documents-2025-08-23-06-00-27.zip (this link will be valid for 1 hour) Folders (1) ▾ Download Selecting ▾ to the right of the folder opens a dropdown menu that shows all individual files being downloaded. Select “Download” in the Download Modal to download files on to your device. The download is not accessible to those without permission to access it. Restrictive tags can also be used to limit access and cannot be bypassed by a user.
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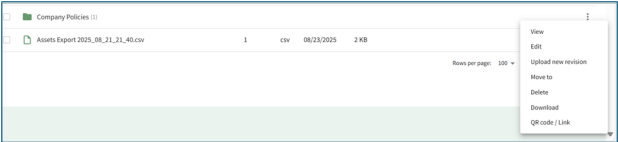
File Context Menu Explanations	
Option	Explanation

View

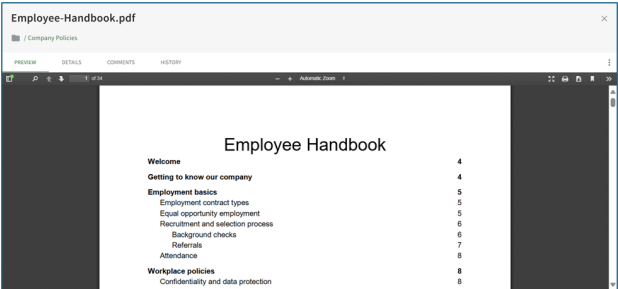
Selecting “View” from the context menu opens a modal that allows the user to preview / download the file, see file details, add comments, and see the file revision history.

How To: View and Manage Files

To view a document in the Documents Module, click on the document title or press the vertical triple dot icon on the far right of the Document List on the Overview Page and select “View” from the dropdown menu.



A modal will open, allowing a user to preview the document.

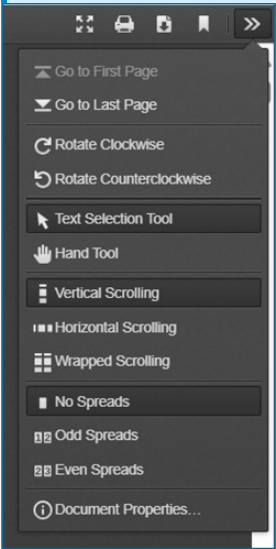


There are four tabs on the View Modal: Preview, Details, Comments, and History.

Preview Tab

The Preview tab allows the user to edit their view of the file. A user can search, scroll, zoom, magnify, reduce, search, print, download, and copy a file. Selecting the double arrow on the toolbar opens a dropdown menu with additional features.

While other supported filetypes can be seen in this tab, only PDF files have the functionality described here.



Any unsupported file types will show the message “No preview available” with a button to “Download Document”. A url file will have an additional button to “Open URL in a New Tab”.

The original file cannot be edited in preview.

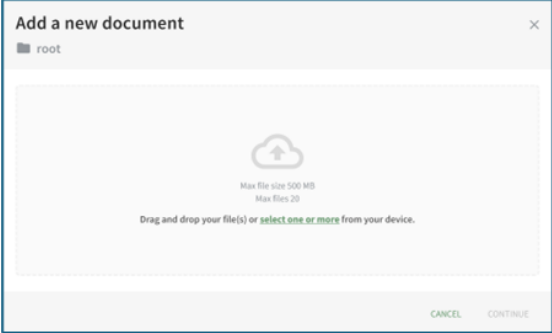
Selecting “Edit” opens the Edit Document Modal, allowing the user to update the document parameters that were established when the new document was added.

How To: Add a New Document

To create a new file within KAStrack, click the “Add Document” button on the Documents Module Overview Page.



This opens the Add a New Document Modal, where the user is prompted to select one or more files to be uploaded.

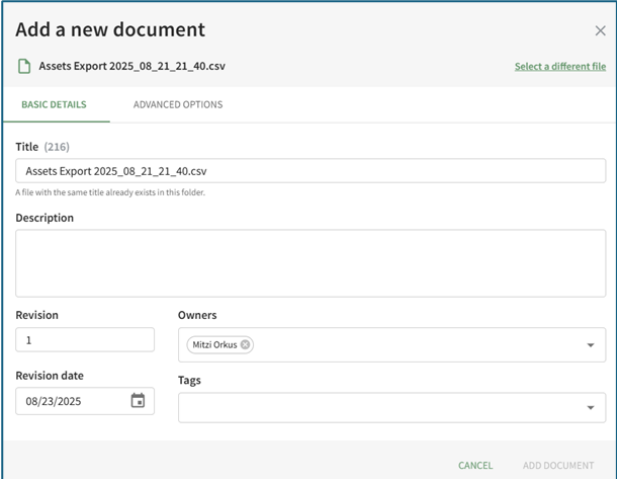


Drag and drop file(s) or select them from your device. Once the desired documents are chosen, select “Continue,” which opens the second screen of the Add a New Document Modal.

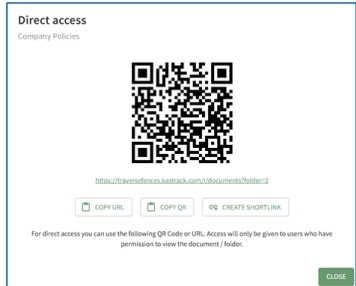
The Document List on the Overview Page is referred to as the Root. It behaves like a top level folder encompassing all other folders and files in the Documents Module. You can get a URL for the Root folder if all files in Documents need to be shared.

Basic Details

Under the Basic Details Tab, the user can input a title, description of the file, revision number and revision date. They can also designate any document owners (the uploader is initially included as an Owner by default) and tags.



If the incorrect file was selected, the user can click “Select a different file” from the top right corner of the modal to exchange it with the correct file.

Upload New Revision	Selecting “Upload New Revision” is used to upload a new revision of an existing file. You can also drag and drop a file from your computer onto the name of an existing file to upload a new revision.
Move To	Selecting “Move To” opens a modal that allows the user to move a file from its current folder to another.
Delete	Selecting “Delete” from the context menu for a file will open a Delete Document Modal that will ask the user to confirm that they want to delete the file before it is permanently deleted. Once a user selects “Delete” from the Delete Document Modal, the files have been removed. When a file that originates in the Documents Module is later linked to another module, it needs to be disassociated before the file can be deleted. If this is the case, the deletion warning will identify where the file needs to be unlinked before deletion can occur.
Download	Selecting “Download” on the context menu for a file automatically downloads an individual file to your device. The download is not accessible to those without permission to access it. Restrictive tags can also be used to limit access and cannot be bypassed by a user. If the user wants to share the download of a file with an external individual, the file must be designated as public.
QR Code / Link	Selecting “QR Code / Link” on the dropdown menu opens the Direct Access Modal for individual files.  The user can use either the URL or QR Code to share access to the files selected. Access will be given to internal users who have permission to view the folder. Access will be given to external users if the folder is public.