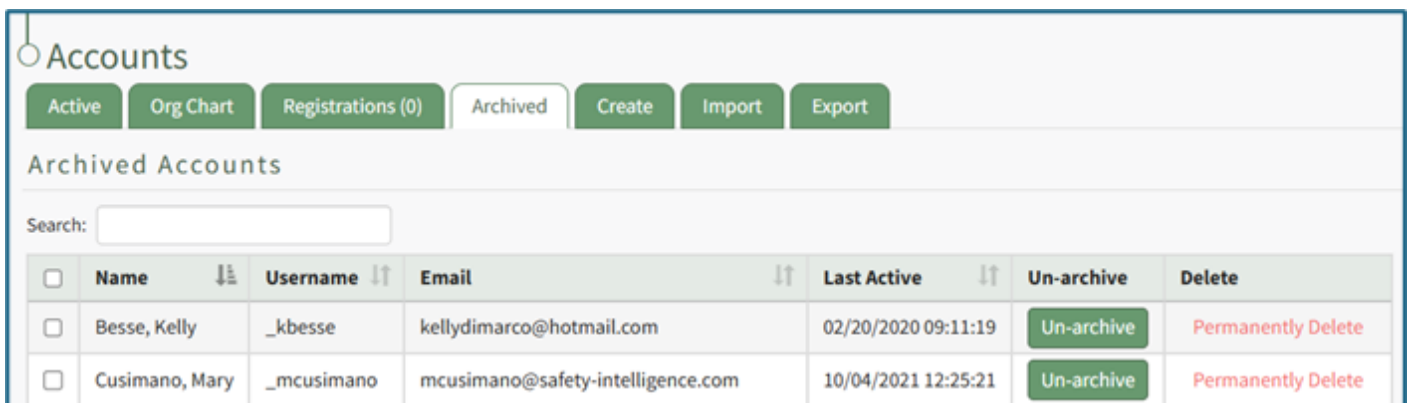


# Accounts Page Archived Tab

The Archived Tab on the Accounts Page displays the Archived Accounts Table, which shows the user accounts that have been intentionally archived. Archived accounts are not visible anywhere in KAStreck other than this table, including Reports. Archived users will be unable to log back into KAStreck unless an administrator restores their account first.

Only individuals with an Admin module level access will see the Archived Accounts Tab.

The Archived Account Table shows user account information for user accounts that have been archived. Account fields are used as the column headers. The default columns are Name, Username, Email, Last Active, Un-archive, and Delete.



| <input type="checkbox"/> | Name           | Username   | Email                             | Last Active         | Un-archive                 | Delete                             |
|--------------------------|----------------|------------|-----------------------------------|---------------------|----------------------------|------------------------------------|
| <input type="checkbox"/> | Besse, Kelly   | _kbesse    | kellydimarco@hotmail.com          | 02/20/2020 09:11:19 | <a href="#">Un-archive</a> | <a href="#">Permanently Delete</a> |
| <input type="checkbox"/> | Cusimano, Mary | _mcusimano | mcusimano@safety-intelligence.com | 10/04/2021 12:25:21 | <a href="#">Un-archive</a> | <a href="#">Permanently Delete</a> |

Any desired account field can be created by an administrator.

## How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

## Site Settings

Company Info Access Levels Security Registration Email Settings Inactive Accounts Payment Settings Account Fields Table Defaults Logs

### System User Account Information Fields

| Field Label     | Required? | Action      |
|-----------------|-----------|-------------|
| Username        | No        | Permissions |
| Email           | No        | Permissions |
| First Name      | No        | Permissions |
| Last Name       | No        | Permissions |
| User Photo      | No        | Permissions |
| Session Timeout | No        | Permissions |
| Home Page       | No        | Permissions |

### Custom/Additional User Account Information Fields

Add a field

| Order     | Field Label | Required? | Action      |
|-----------|-------------|-----------|-------------|
| ≡ Drag Me | Employee ID | No        | Edit Delete |
| ≡ Drag Me | Address 1   | No        | Edit Delete |
| ≡ Drag Me | Address 2   | No        | Edit Delete |
| ≡ Drag Me | Phone       | No        | Edit Delete |
| ≡ Drag Me | Supplier    | No        | Edit Delete |

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

### Add Field X

**Label \***

**Type \***

Allow multiple values

Required

Sensitive field

| Accounts Module Level | View Own                            | View Other                          | Edit Own                            | Edit Other                          |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Admin                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Supervisor            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Employee              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Observer              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Logged out user       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The Archived Accounts Table is customizable via the Table Defaults Tab in the Site Settings Module.

### How To: Edit the Accounts Module Archived Accounts Table

To edit the Archived Accounts Table in the Accounts Module, go to the Table Defaults Tab in the Site Settings Module.

Select "Accounts: Archived" from the dropdown menu.

The screenshot shows the 'Table Defaults' interface for the 'Accounts: Archived' table. At the top, there is a dropdown menu with 'Accounts: Archived' selected. Below the dropdown are two buttons: 'Edit Columns' and 'View Live Table'. Underneath these buttons is a preview section labeled 'Preview (up to 5 rows shown)'. The preview contains a table with the following columns: Name, Username, Email, Last Active, Un-archive, and Delete. The first row of data is:  FAMILY, KREWE, krewboard, krewboard@trainingground.kastrack.com, --, Un-archive, Permanently Delete.

| <input type="checkbox"/> | Name          | Username  | Email                                 | Last Active | Un-archive | Delete             |
|--------------------------|---------------|-----------|---------------------------------------|-------------|------------|--------------------|
| <input type="checkbox"/> | FAMILY, KREWE | krewboard | krewboard@trainingground.kastrack.com | --          | Un-archive | Permanently Delete |

Select the "Edit Columns" button, opening the Choose Columns Modal. The default column choices include: name, username, email, last active, un-archive, delete, first name, last name, employee ID, phone, Address 1 and Address 2 and any customized account fields.

### How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

## Site Settings

Company Info Access Levels Security Registration Email Settings Inactive Accounts Payment Settings Account Fields Table Defaults Logs

### System User Account Information Fields

| Field Label     | Required? | Action      |
|-----------------|-----------|-------------|
| Username        | No        | Permissions |
| Email           | No        | Permissions |
| First Name      | No        | Permissions |
| Last Name       | No        | Permissions |
| User Photo      | No        | Permissions |
| Session Timeout | No        | Permissions |
| Home Page       | No        | Permissions |

### Custom/Additional User Account Information Fields

Add a field

| Order     | Field Label | Required? | Action      |
|-----------|-------------|-----------|-------------|
| ≡ Drag Me | Employee ID | No        | Edit Delete |
| ≡ Drag Me | Address 1   | No        | Edit Delete |
| ≡ Drag Me | Address 2   | No        | Edit Delete |
| ≡ Drag Me | Phone       | No        | Edit Delete |
| ≡ Drag Me | Supplier    | No        | Edit Delete |

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

### Add Field X

**Label \***

**Type \***

Allow multiple values

Required

Sensitive field

| Accounts Module Level | View Own                            | View Other                          | Edit Own                            | Edit Other                          |
|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Admin                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Supervisor            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Employee              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Observer              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Logged out user       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

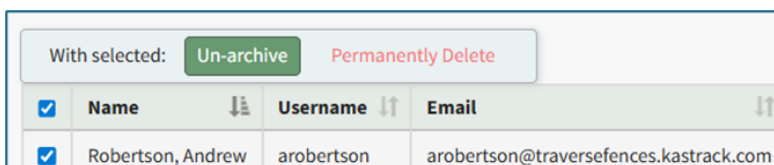
The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Accounts Module.

This would include any additional account fields created as discussed above plus other existing account fields such as First Name, Last Name, Employee ID, Phone, Address 1, and Address 2.

Selecting any checkbox in a row opens a bulk actions modal above the table. Selecting the checkbox in the first column of the top row selects / deselects all rows in the table.



| <input checked="" type="checkbox"/> | Name              | Username   | Email                                  |
|-------------------------------------|-------------------|------------|--|
| <input checked="" type="checkbox"/> | Robertson, Andrew | arobertson | arobertson@traversefences.kastrack.com |

Bulk action options on the Archived Tab are Un-archive and Permanently Delete.

## How To: Archive a User Account

To archive an account, open the Active Tab on the Accounts Page in the Accounts Module.

Click the three dot (...) icon next to the user in the Active Accounts Table, opening the context menu. Select "Archive Account".

**Accounts**

Active | Org Chart | Registrations (0) | Archived | Create | Import | Export

Active Accounts

Add User Access Level Quick Edit Supervisor Links

Include Deactivated Accounts

Search:  Show 25 entries

| <input type="checkbox"/> | Name              | Username | First Name |
|--------------------------|-------------------|----------|------------|
| <input type="checkbox"/> | Becker, Allison   | ***      | Allison    |
| <input type="checkbox"/> | Bergstrom, Nicole | ***      | Nicole     |
| <input type="checkbox"/> | Carter, Mary      | ***      | Mary       |
| <input type="checkbox"/> | Delgado, Frank    | ***      | Frank      |
| <input type="checkbox"/> | Dupree, Michael   | mdupree  | Michael    |

Context menu for selected row:

- View Account Info
- Edit Account Info
- Reset Password
- Send Welcome Email
- Deactivate Account
- Archive Account
- View Certifications

Selecting “Archive Account” from the context menu will open a Confirmation Modal.

**trainingground.kastrack.com says**

Are you sure you want to archive this account? Archived accounts are not visible anywhere on the site, including reports.

The modal states, “Are you sure you want to archive this account? Archived accounts are not visible anywhere on the site, including reports.”

Select the “OK” button to archive the selected user account. The user account will be removed from the table of active accounts. Their account information is now found under the Archived Tab on the Accounts Page.

Select the “Cancel” button and return to the Active Tab on the Accounts Page.

## How To: Restore an Archived User Account

To restore an archived account, go to the Archived Tab on the Accounts Page in the Accounts Module.

**Accounts**

Active | Org Chart | Registrations (0) | Archived | Create | Import | Export

Archived Accounts

Search:

| <input type="checkbox"/> | Name           | Username   | Email                             | Last Active         | Un-archive                                | Delete  |
|--------------------------|----------------|------------|-----------------------------------|---------------------|---|---|
| <input type="checkbox"/> | Besse, Kelly   | _kbesse    | kellydimarco@hotmail.com          | 02/20/2020 09:11:19 | <input type="button" value="Un-archive"/> | <input type="button" value="Permanently Delete"/> |
| <input type="checkbox"/> | Cusimano, Mary | _mcusimano | mcusimano@safety-intelligence.com | 10/04/2021 12:25:21 | <input type="button" value="Un-archive"/> | <input type="button" value="Permanently Delete"/> |

All archived accounts show in the Archived Accounts Table. Identify the user whose account you want to restore and select the “Un-archive” button.

Accounts

Active Org Chart Registrations (0) Archived Create Import Export

Archived Accounts

Un-archived Caleb Spiers.

Search:

| <input type="checkbox"/> | Name              | Username   | Email                                  | Last Active         | Un-archive | Delete             |
|--------------------------|-------------------|------------|--|---------------------|------------|--------------------|
| <input type="checkbox"/> | Robertson, Andrew | arobertson | arobertson@traversefences.kastrack.com | 01/18/2023 16:24:38 | Un-archive | Permanently Delete |

Showing 1 to 1 of 1 entries

A message will appear in blue indicating that the selected user has been un-archived. The user no longer appears on the Archived Tab, showing on the Active Account Table on the Active Tab instead.

If you wish to restore multiple accounts at once, use the checkboxes beside each account to select multiple accounts, then click the Un-archive button from the With Select popup that shows above the table once checkboxes have been selected.

## How To: Permanently Delete a User Account

An account must first be archived before it can be deleted.

### How To: Archive a User Account

To archive an account, open the Active Tab on the Accounts Page in the Accounts Module.

Click the three dot (...) icon next to the user in the Active Accounts Table, opening the context menu. Select “Archive Account”.

The screenshot shows the 'Accounts' page with tabs for Active, Org Chart, Registrations (0), Archived, Create, Import, and Export. Under 'Active Accounts', there are search and display options. A table lists active accounts with columns for Name, Username, and First Name. A context menu is open over the 'Archive Account' option for the user 'Dupree, Michael'.

| Name              | Username | First Name |
|-------------------|----------|------------|
| Becker, Allison   |          | Allison    |
| Bergstrom, Nicole |          | Nicole     |
| Carter, Mary      |          | Mary       |
| Delgado, Frank    |          | Frank      |
| Dupree, Michael   | mdupree  | Michael    |

Selecting “Archive Account” from the context menu will open a Confirmation Modal.

The modal dialog box has a title 'trainingground.kastrack.com says' and the text: 'Are you sure you want to archive this account? Archived accounts are not visible anywhere on the site, including reports.' It contains 'OK' and 'Cancel' buttons.

The modal states, “Are you sure you want to archive this account? Archived accounts are not visible anywhere on the site, including reports.”

Select the “OK” button to archive the selected user account. The user account will be removed from the table of active accounts. Their account information is now found under the Archived Tab on the Accounts Page.

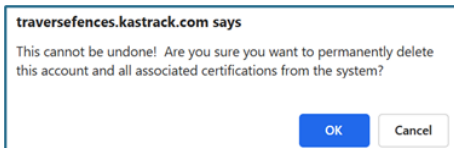
Select the “Cancel” button and return to the Active Tab on the Accounts Page.

To permanently delete a user account, go to the Archived Tab on the Accounts Page in the Accounts Module.

The screenshot shows the 'Accounts' page with the 'Archived' tab selected. It displays a table of archived accounts with columns for Name, Username, Email, Last Active, Un-archive, and Delete.

| Name           | Username   | Email                             | Last Active         | Un-archive | Delete             |
|----------------|------------|-----------------------------------|---------------------|------------|--------------------|
| Besse, Kelly   | _kbesse    | kellydimarco@hotmail.com          | 02/20/2020 09:11:19 | Un-archive | Permanently Delete |
| Cusimano, Mary | _mcusimano | mcusimano@safety-intelligence.com | 10/04/2021 12:25:21 | Un-archive | Permanently Delete |

Identify the user whose account you want to permanently delete and click “Permanently Delete” within that user’s information row.



A confirmation modal appears stating, “This cannot be undone! Are you sure you want to permanently delete this account and all associated certifications from the system?”

Select the “OK” button to permanently delete the user’s account. Click “Cancel” to return to the Archived Tab without making any changes.

If you wish to delete multiple accounts at once, use the checkboxes beside each account to select multiple accounts, then click the Permanently Delete button from the With Select popup above the table once checkboxes have been selected.

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