

Accounts Settings

There is no Setting Page for the Accounts Module, however there are system default module levels that can be accessed through the Access Levels Tab of the Site Settings Page from the Main Menu.

There are four system default module level associated with the Accounts Module. An explanation of the permissions associated with each default module level are shown in the Account Module Level Permissions Table below. Accounts Module permissions are organized differently than other modules. Permissions take into account if you do or do not supervise other users.

System default module levels cannot be customized.

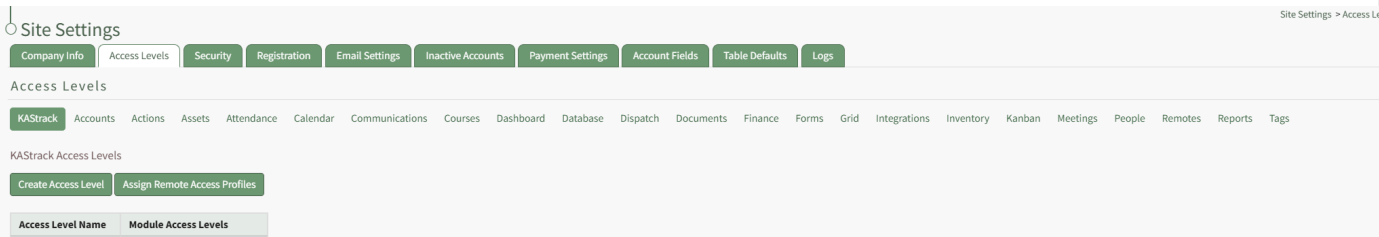
Accounts Module Level Permissions	
Module Level	Permissions
Admin	Can change their own password <u>Regarding Non-Supervised Users:</u> Can access all user accounts; Can access accounts that have no assigned access level; Can edit/delete comments on accounts <u>Regarding Supervised Users:</u> Can supervise users regardless of their Accounts Module module level; Can edit/delete comments on accounts <u>Regarding Administration:</u> Can set up relationships between users regardless of their Accounts Module module level; Can edit company info; Can edit company settings; Can edit security settings; Can reset/change passwords for existing accounts; Can create, archive, un-archive, deactivate, reactivate, and permanently delete user accounts; Can assign user access levels; Can edit companies; Can create or delete companies
Supervisor	Can change own password <u>Regarding Non-Supervised Users:</u> <i>No permissions for non-supervised users</i> <u>Regarding Supervised Users:</u> Can supervise users regardless of their Accounts Module module level; Can edit/delete comments on the accounts of Supervised Users <u>Regarding Administration:</u> Can reset/change password for ANY existing accounts
Employee	Can change own password
Observer	Can change own password <u>Regarding Non-Supervised Users:</u> Can access all user accounts that are assigned an access level

New Module Levels can be created in order to customize module level permissions.

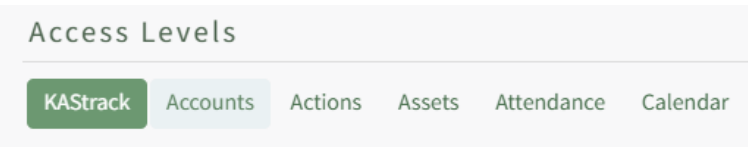
How To: Create a New Module Level (Accounts Module)

There is no Settings Page for the Accounts Module. You must use the Site Settings Module to access and manage Module Levels for the Accounts Module.

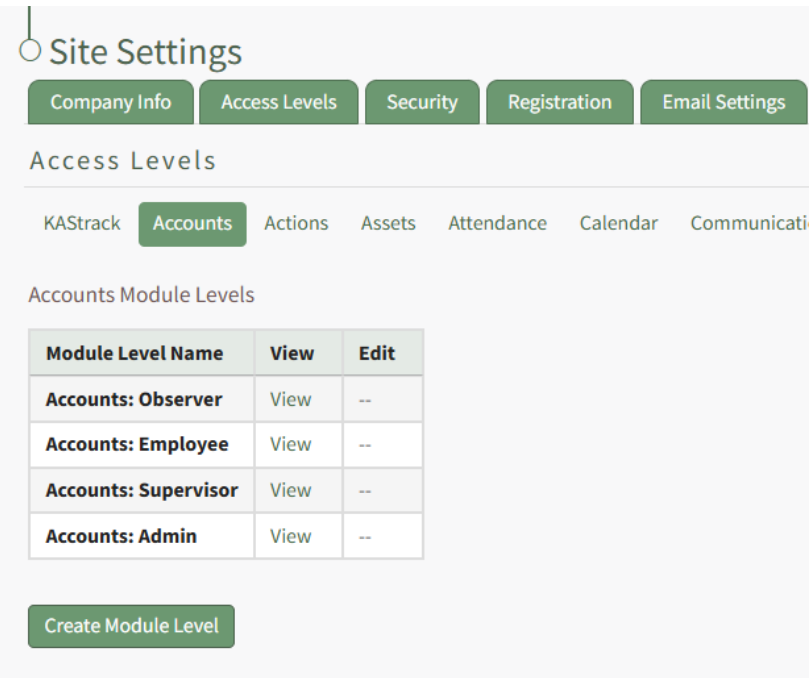
To create a new Module Level for the Accounts Module, go to the Access Levels Tab in the Site Setting Module through the Main Menu.



Click Accounts under the Access Levels header.



This opens the Accounts Module Level Table.



Click the Create Module Level button opening the Create New Accounts Module Level Page within the Site Settings Module.

Create New Accounts Module Level

Module Level Name *

Own Account

☐ Can change own password

Account Field Restrictions

Add/remove edit account field restrictions

Non-Supervised Users

Can access all users in the selected levels

☐ All levels
☐ Observer
☐ Employee
☐ Supervisor
☐ Admin
☐ KAStrack Admin
☐ New Level

☐ Can access accounts that have no assigned access level
☐ Can edit/delete comments on accounts

Supervised Users

Can supervise users in the selected levels

☐ All levels
☐ Observer
☐ Employee
☐ Supervisor
☐ Admin
☐ KAStrack Admin
☐ New Level

☐ Can edit/delete comments on accounts

Administration

Can set up relationships between selected levels

☐ All levels
☐ Observer
☐ Employee
☐ Supervisor
☐ Admin
☐ KAStrack Admin
☐ New Level

☐ Can edit company info
☐ Can edit company settings
☐ Can edit security settings
☐ Can reset/change password for existing accounts
☐ Can create, archive, un-archive, deactivate, reactivate, and permanently delete user accounts
☐ Can assign user access levels
☐ Can create, delete, and edit user access levels
☐ Can edit companies
☐ Can create or delete companies

Level hierarchy

Observer

Employee

Supervisor

Admin

KAStrack Admin

New Role

Create Accounts Module Level

Cancel

Input the title of the new module level.

Account field restrictions can only be edited after the module level has been created.

Select the permissions you want to be assigned to the new module by selecting the appropriate checkboxes. A list of all possible permissions have been included in the table below.

Comprehensive List of Accounts Module Level Permissions

	Permissions
Own Account	Can change password
Non-Supervised Users	Can access all users in the selected levels: All levels, Observer, Employee, Supervisor, Admin, KAStrack Admin, New Level; Can access accounts that have no assigned access level; can edit/delete comments on accounts
Supervised Users	Can supervise users in the selected levels: All Levels, Observer, Employee, Supervisor, Admin, KAStrack Admin, New Level; Can edit/delete comments on accounts
Administration	Can set up relationships between selected levels: All Levels, Observer, Employee, Supervisor, Admin, KAStrack Admin, New Level; Can edit company info; Can edit company settings; Can edit security settings; Can reset/change password for existing accounts; Can create, archive, un-archive, deactivate, reactive, and permanently delete user accounts; Can assign user access levels; Can create, delete, and edit user access levels; Can edit companies; Can create or delete companies

Level hierarchy

- Observer
- Employee
- Supervisor
- Admin
- KAStrack Admin
- New Role

You can drag and drop the module levels, impacted the hierarchy of how they are displayed in the Module Level Table on the Access Levels Tab. Click the Create Module Level Button on the bottom of the page and it will now be visible on the Accounts Module Levels Table.

Now that the customized module level has been created, you can edit the account field restrictions.

How To: Edit Account Field Restrictions for Customized Module Levels

To edit account field restrictions for a customized module level, go to the Access Levels Tab in the Site Setting Module through the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

Access Levels

KAStrack

Accounts

Actions

Assets

Attendance

Calendar

Communications

Courses

Dashboard

Database

Dispatch

Documents

Finance

Forms

Grid

Integrations

Inventory

Kanban

Meetings

People

Remotes

Reports

Tags

KAStrack Access Levels

Create Access Level

Assign Remote Access Profiles

Access Level Name

Module Access Levels

Click Accounts under the Access Levels header.

Access Levels

KAStrack

Accounts

Actions

Assets

Attendance

Calendar

This opens the Accounts Module Level Table.

Site Settings

Site Settings > Access Levels > Accounts

Company Info

Access Levels

Security

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Account Fields

Table Defaults

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Access Levels

KAStrack

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Integrations

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Reports

Tags

Accounts Module Levels

Module Level Name	View	Edit
Accounts: Board Members	View	Edit
Accounts: Admin	View	--
Accounts: Supervisor	View	--
Accounts: Employee	View	--
Accounts: Observer	View	--

Create Module Level

Click the Edit Button to the right of the module level whose account field restrictions you wish to edit opening the Edit Accounts Module Level Page in Site Settings.

Site Settings

Site Settings > Access Levels > Accounts > Board Members > Edit

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Account Fields

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Forms

Grid

Integrations

Inventory

Kanban

Meetings

People

Remotes

Reports

Tags

Edit Accounts Module Level: Board Members

Module Level Name *

Board Members

Own Account

☐ Can change own password

Account Field Restrictions

Add/remove edit account field restrictions

Non-Supervised Users

Can access all users in the selected levels

☐ All levels
☐ Board Members
☐ KAStrack Admin
☐ Admin
☐ Supervisor
☐ Employee
☐ Observer

☐ Can access accounts that have no assigned access level
☐ Can edit/delete comments on accounts

Click the link to "Add/remove edit account field restrictions" opening the Edit Field Restrictions Modal.

Edit Field Restrictions

X

Field	View Own	View Other	Edit Own	Edit Other
Username	☒	☒	☒	☒
Email	☒	☒	☒	☒
First Name	☒	☒	☒	☒
Last Name	☒	☒	☒	☒
User Photo	☒	☒	☒	☒
Session Timeout	☒	☒	☒	☒
Home Page	☒	☒	☒	☒
Middle Name	☒	☒	☒	☒
Date of Birth	☒	☒	☒	☒
Age	☒	☒	☒	☒
Badge Number	☒	☒	☒	☒
Contact Phone	☒	☒	☒	☒
Address 1	☒	☒	☒	☒
Address 2	☒	☒	☒	☒
Hire Date	☒	☒	☒	☒
Seniority	☒	☒	☒	☒
Regional Managers	☒	☒	☒	☒
District Managers	☒	☒	☒	☒

Save

Cancel

Make the desired field restriction changes and select the "Save" button.

To edit the permissions for a customized Module Level in the Accounts Module, click the edit button in the Accounts Module Level Table, which is visible on the Access Levels Tab in the Site Settings Module.

Site Settings

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Inactive Accounts

Payment Settings

Account Fields

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Logs

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KAStrack

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Attendance

Calendar

Communications

Courses

Dashboard

Database

Dispatch

Documents

Finance

Forms

Grid

Accounts Module Levels

Module Level Name	View	Edit
Accounts: Board Members	View	Edit
Accounts: Admin	View	--
Accounts: Supervisor	View	--
Accounts: Employee	View	--
Accounts: Observer	View	--

Create Module Level

A complete list of all permissions associated with Accounts Module have been provided below.

Own Account

- ☐ Can change own password

Account Field Restrictions

Add/remove edit account field restrictions

Non-Supervised Users**Can access all users in the selected levels**

- ☐ All levels
- ☐ Board Members
- ☐ KAStrack Admin
- ☐ Admin
- ☐ Supervisor
- ☐ Employee
- ☐ Observer

- ☐ Can access accounts that have no assigned access level
- ☐ Can edit/delete comments on accounts

Supervised Users**Can supervise users in the selected levels**

- ☐ All levels
- ☐ Board Members
- ☐ KAStrack Admin
- ☐ Admin
- ☐ Supervisor
- ☐ Employee
- ☐ Observer

- ☐ Can edit/delete comments on accounts

Administration**Can set up relationships between selected levels**

- ☐ All levels
- ☐ Board Members
- ☐ KAStrack Admin
- ☐ Admin
- ☐ Supervisor
- ☐ Employee
- ☐ Observer

- ☐ Can edit company info
- ☐ Can edit company settings
- ☐ Can edit security settings
- ☐ Can reset/change password for existing accounts
- ☐ Can create, archive, un-archive, deactivate, reactivate, and permanently delete user accounts
- ☐ Can assign user access levels
- ☐ Can create, delete, and edit user access levels
- ☐ Can edit companies
- ☐ Can create or delete companies

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