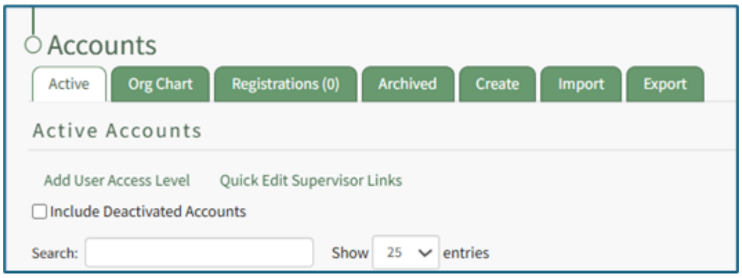
Add an Access Level for an Individual

To add an access level for an individual user, go to the Active Tab on the Accounts Page of the Accounts Module. This tab is also accessible from the Main Menu. There are three ways to add an access level for a user from the Active Tab.

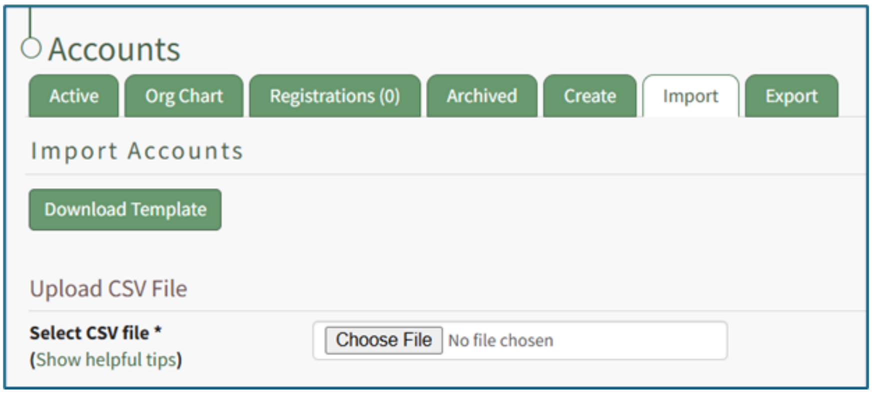


> You can also update multiple users' access levels via the Import Tab on the Accounts Page. When doing so, make sure to separate each access level with a semicolon.

How To: Bulk Import Account Information

Before bulk importing several new accounts, be sure that your organization has customized the account information fields to meet your needs. WIKI LINK TO ACCOUNT FIELDS TAB: SITE SETTINGS Once your account information preferences have been established in the Site Settings Module, you can begin organizing the CSV file for bulk imports.

Open the Import Tab on the Accounts Page in the Accounts Module.

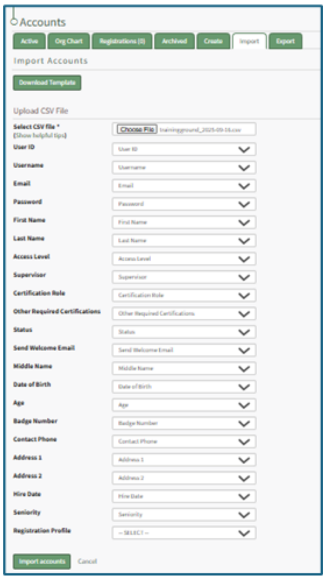


Select the “Download Template” button to have KAStrack generate a template with the appropriate fields in separate columns that match the designated preferences in the Site Settings Module.

When your CSV file with new account information is complete, ensure it is saved with the CSV format UTF-8.

Click “Choose File,” and select the correct CSV file from your computer. Click “Open”.

Each of the Account Information fields will now show below the selected CSV file.



KAStrack scans the first row of your CSV file for matching column headers and attempts to map your column headers to the appropriate Account Fields. The dropdown menu next to each field will automatically be set to any matching column headings from the CSV.

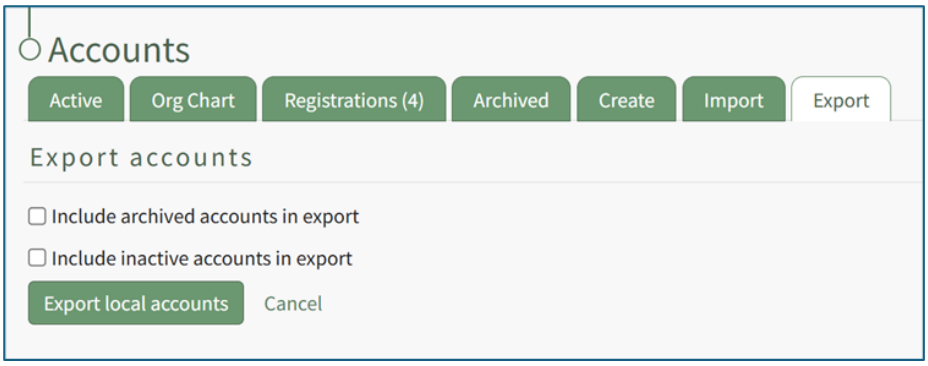
If a matching column couldn't be found, you can manually choose which column should map to those Account Fields by choosing an option from the dropdown.

Select the “Import Accounts” button to import the information. Click “Cancel” to return to the Active Tab on the Accounts Page without saving information.

> The Import Tab can also be used to update existing account information. The KAStrack-generated unique user ID is a required column in the CSV file if editing an existing account. This can be found in the URL at the top of your browser when viewing a user’s Account Info page, or by doing an account export.

How To: Export User Account Information

Open the Export Tab on the Accounts Page in the Accounts Module.



There are two checkboxes that allow for customization of your export. Both or neither can be included.

Select “Include archived accounts in export” to include archived accounts in your export. Select “Include inactive accounts in export” to include inactive accounts in your export.

Click “Export local accounts” and a CSV file will automatically be downloaded to your personal device.

Helpful Tips for Bulk Imports

The CSV document created to import account information will vary based on your customized Site Settings. Required account fields are username, password, first and last name. Required status for fields is designated by an asterisk (*). Each included field should be represented by its own column in the CSV document.

> Required system user account information fields do not show as required on the Account Fields Tab on the Site Settings Page.

Helpful Tips for Account Information Bulk Imports	
Field	**Comments / Suggestions**
User ID	The User ID is a unique system ID for the user. Leave blank to create a new user.
Username*	Required Field. Character usage is limited to lowercase letters, numbers, hyphens, underscores, periods, or at signs. A username cannot contain spaces and cannot start with an underscore. When editing an existing account via imports, the username and email cannot be changed simultaneously.

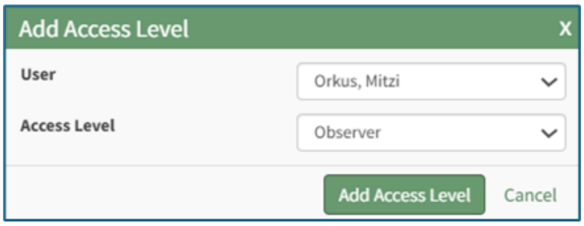
Email	This field may be left blank when creating a new user. If so, an email address will be generated for the user with the format: username@sitename.kastrack.com. > When editing an existing account via imports, the username and email cannot be changed simultaneously.
Password*	Required Field. Default settings require a minimum of 8 characters. All passwords created in an import will be temporary. Users will be required to update their password upon their initial login.
First Name*	Required Field.
Last Name*	Required Field.
Access Levels	KAStrack defaults: Employee, Supervisor, Admin, Observer. Customized Access Levels can be created. Separate multiple values with a semi-colon. If a user is not assigned an Access Level, they will not have access to ANY modules. > This column can be left blank if the Access Level is identified in the Registration Profile applied to the user.
Supervisor	The supervisor's username must be entered verbatim. Separate multiple values with a semi-colon. > This column can be left blank if the Supervisor is identified in the Registration Profile applied to the user.
Certification Role	Allows assignment of roles in the People Module. Multiple values should be separated with a semi-colon. Role names must be preceded by Company name as listed in the People Module, e.g. CompanyName RoleName. > This column can be left blank if Certification Roles are identified in the Registration Profile applied to the user.
Status	User status cannot be changed through import. All new imported accounts will automatically be Active.
Employee ID	This is an optional field (included by default settings) that can be edited or removed by going to the Account Fields Tab in Site Settings.
Phone	This is an optional field (included by default settings) that can be edited or removed by going to the Account Fields Tab in Site Settings.

Address 1	This is an optional field (included by default settings) that can be edited or removed by going to the Account Fields Tab in Site Settings.
Address 2	This is an optional field (included by default settings) that can be edited or removed by going to the Account Fields Tab in Site Settings.
Registration Profile	This column is used to apply Registration Profiles to accounts. The full name of the Registration Profile must be entered. The following fields listed above can be modified through the Registration Profile: Access Levels, Supervisors, and Certification Roles.
Custom Fields	If other custom fields have been created on the Account Fields Tab in Site Settings, they can be included as column headers in an Import. These fields may or may not be required based on their settings in the Account Fields Tab.

Adding an Access Level Using the Add User Access Level Quick Link

To add an access level using the add user access level quick link, go to the Active Tab on the Accounts Page.

“Add User Access Level” opening the Add Access Level Modal.



Select the individual user from the list provided on the dropdown menu.

Select the Access Level you would like to add to the user’s account.

Select the “Save” button to save the changes within the system or click “Cancel” to return to the Active Tab on the Accounts Page.

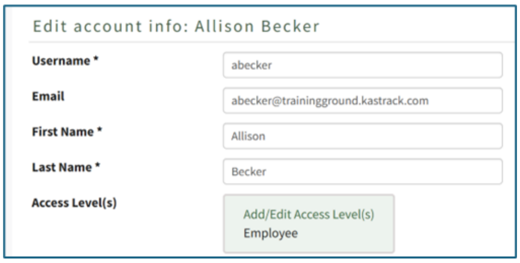
A second way to edit a user’s access levels is from the Active Accounts Table (if the Access Level column is included on the Active Accounts Table, which can be customized).

The modal will display two columns: Selected Access Levels (what has been assigned to the user) and Available Access Levels (what can still be assigned). Drag and drop the designations as desired or click an item to move it from its current column to the other.

Select the “Save Access Levels” button at the bottom of the modal to save the changes or click “Cancel” to return to the Active Accounts Tab on the Accounts Page.

Adding an Access Level by Editing a User's Account Information

To add an access level by editing a user’s account information, go to the Active Tab of the Accounts Page. Select the three dots (…) icon in the Name column opening the context menu for the specific user, and select “Edit Account Info”. Click “Add/Edit Access Level(s)” in the Access Levels Field.



The Select Access Levels Modal will display the two-column drag-and-drop tool.

Adding an Access Level from the Active Accounts Table

> Adding an access level from the active accounts table is only possible if the access level column shows on the active accounts table, which is included by default. If the column is not visible, it can be added through the Site Settings Module.

How To: Edit the Accounts Module Active Accounts Table

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

Select “Accounts: Active” from the dropdown menu.

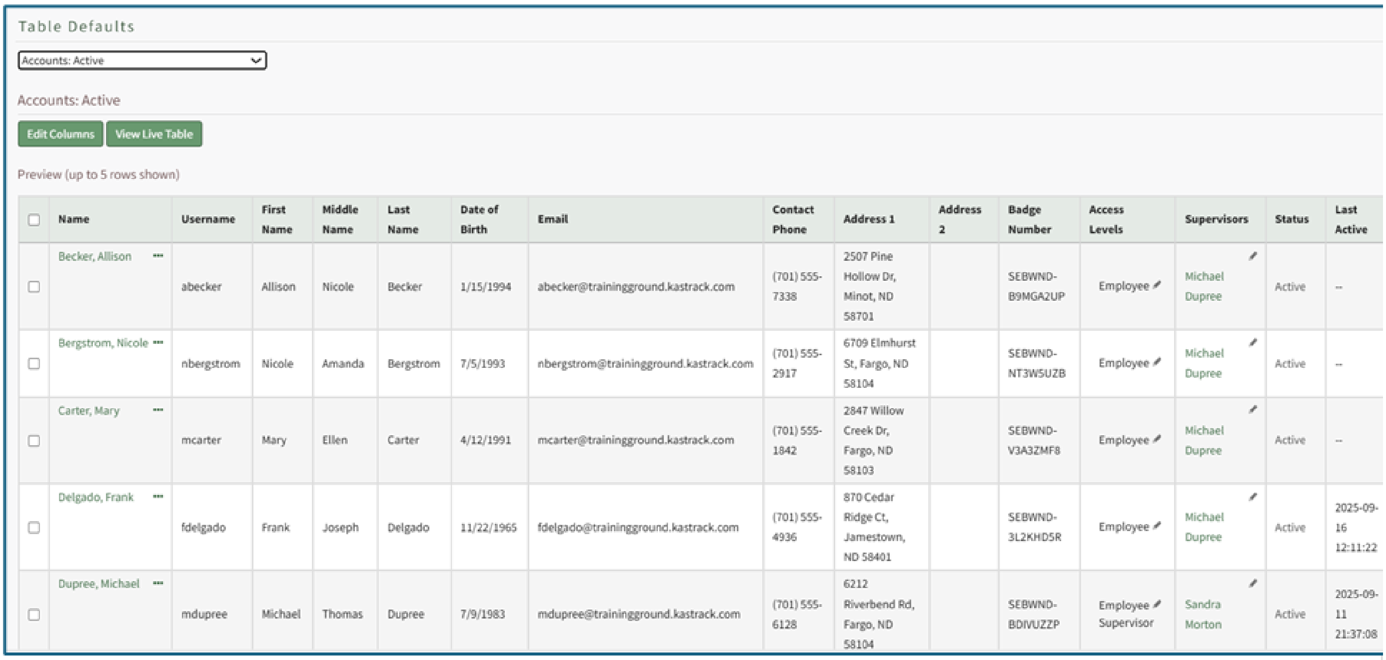


Table Defaults

Accounts: Active

Accounts: Active

Edit Columns View Live Table

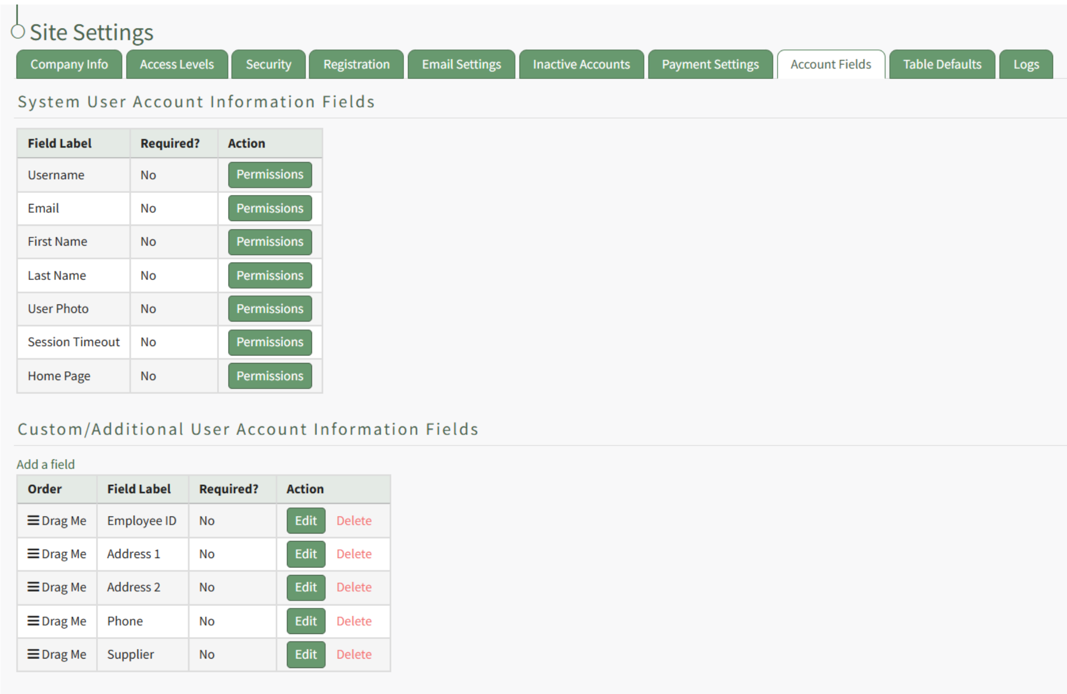
Preview (up to 5 rows shown)

	Name	Username	First Name	Middle Name	Last Name	Date of Birth	Email	Contact Phone	Address 1	Address 2	Badge Number	Access Levels	Supervisors	Status	Last Active
	Becker, Allison	abecker	Allison	Nicole	Becker	1/15/1994	abecker@trainingground.kastrack.com	(701) 555-7338	2507 Pine Hollow Dr, Minot, ND 58701		SEBWND-B9MGA2UP	Employee	Michael Dupree	Active	--
	Bergstrom, Nicole	nbergstrom	Nicole	Amanda	Bergstrom	7/5/1993	nbergstrom@trainingground.kastrack.com	(701) 555-2917	6709 Elmhurst St, Fargo, ND 58104		SEBWND-NT3W5UZB	Employee	Michael Dupree	Active	--
	Carter, Mary	mcarter	Mary	Ellen	Carter	4/12/1991	mcarter@trainingground.kastrack.com	(701) 555-1842	2847 Willow Creek Dr, Fargo, ND 58103		SEBWND-V3A3ZMF8	Employee	Michael Dupree	Active	--
	Delgado, Frank	fdelgado	Frank	Joseph	Delgado	11/22/1965	fdelgado@trainingground.kastrack.com	(701) 555-4936	870 Cedar Ridge Ct, Jamestown, ND 58401		SEBWND-3L2KHD5R	Employee	Michael Dupree	Active	2025-09-16 12:11:22
	Dupree, Michael	mdupree	Michael	Thomas	Dupree	7/9/1983	mdupree@trainingground.kastrack.com	(701) 555-6128	6212 Riverbend Rd, Fargo, ND 58104		SEBWND-BDIVUZZP	Employee Supervisor	Sandra Morton	Active	2025-09-11 21:37:08

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: name, username, email, access levels, supervisors, become, status, last active, login, archive, first name, last night, 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

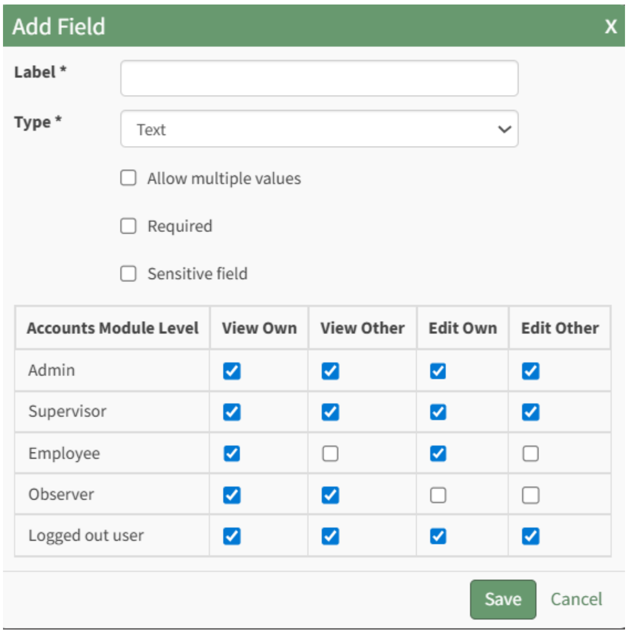
Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

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.



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.

To add an access level from the Active Accounts Table, go to the Active Tab on the Accounts Page.

	Name	Username	Email	Access Levels	Supervisors
	Search	Search	Search	Search	Search
	Gardner, Marcus	mgardner	mgardner@traversefences.kastrack.com	Employee	MEMBERSHIP LISTING
	Johnston, Tyler	tjohnston	tjohnston@traversefences.kastrack.com	Employee	MEMBERSHIP LISTING
	Jones, Terry	tjones	hunter.folse+tjones@gmail.com	Employee	Troy Trainer
	Joseph, Colin	cjoseph	cjoseph@traversefences.kastrack.com	Employee	MEMBERSHIP LISTING

Select the pencil icon to the right of the access level in the Access Levels Column. This opens the Select Access Levels Modal.

The modal will display two columns: Selected Access Levels (what has been assigned to the user) and Available Access Levels (what can still be assigned). Drag and drop the designations as desired or click an item to move it from its current column to the other.

Select the “Save Access Levels” button at the bottom of the modal to save the changes or click “Cancel” to return to the Active Accounts Tab on the Accounts Page.

Revision #7
Created 2025-11-23 22:44:51 UTC by Mitzi Orkus
Updated 2026-01-23 00:32:20 UTC by Mitzi Orkus