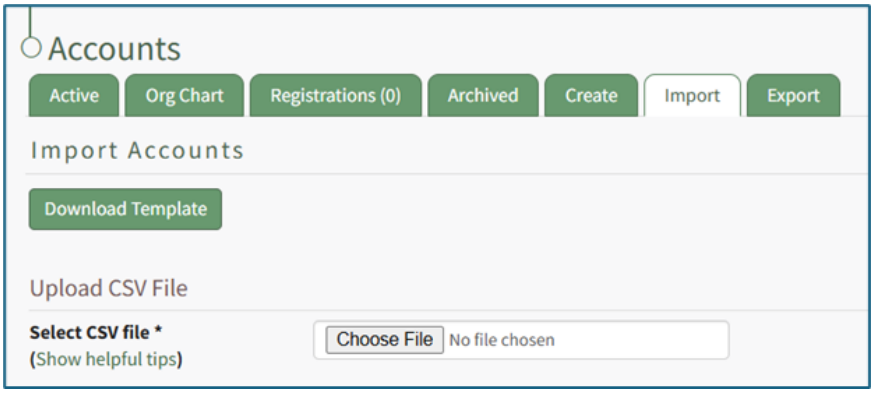
Bulk Import Account Information

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.

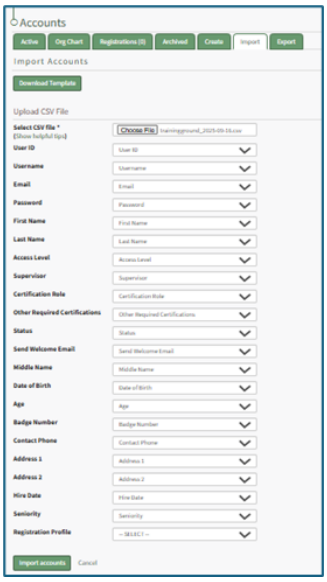


Select the “Download Template” button to have KAStrack generate a template with the appropriate fields in separate columns that match the designated preferences in the Site Settings Module.

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.

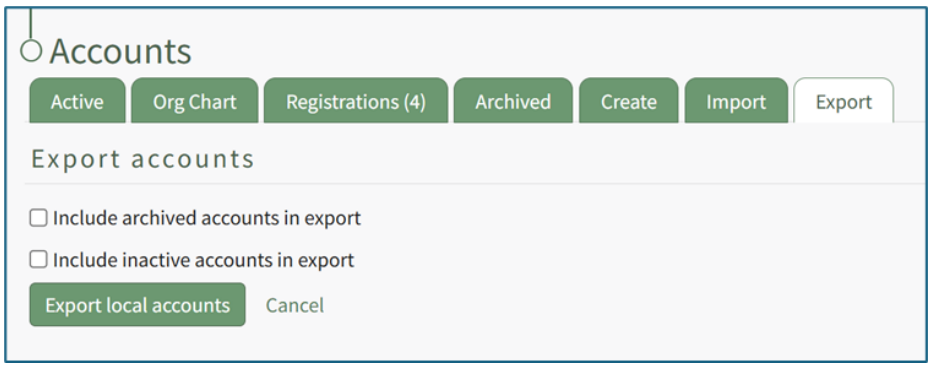
If a matching column couldn't be found, you can manually choose which column should map to those Account Fields by choosing an option from the dropdown.

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.

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