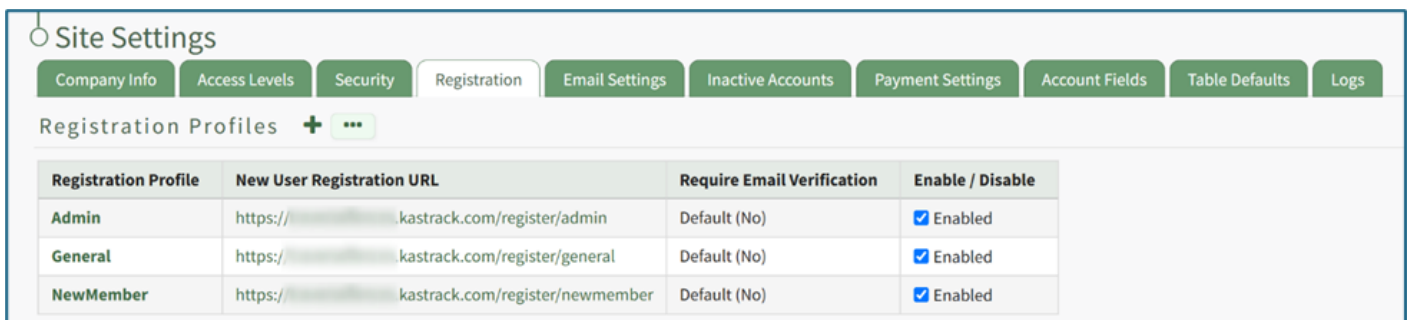


Registrations Tab

The Registration Tab on the Site Settings Page is used to create Registration Profiles. Registration Profiles serve as templates for the efficient generation of new user accounts and can allow existing accounts to update account configurations.

Each registration profile has a customizable URL link that can be sent to individuals for new account registrations. A registration profile will specify the new user's access level(s), certification role(s), supervisor(s), and notification template, as well as who should be notified about the new account, who will approve the new account, if email verification of the new account is required, and whether a welcome email should be sent. There is also an ability to leave a customized note for new registrations and a different message for an existing user.

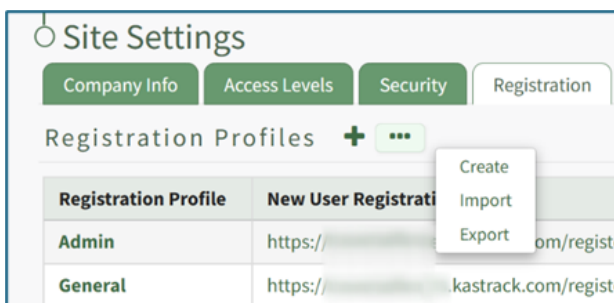
If an existing user logs in from a Registration Profile link, the access level(s), certification role(s), and supervisor(s) listed on the Registration Profile will be added to the user's account. Any existing access levels, certification roles, and supervisors on their account remain unchanged.



The screenshot shows the 'Site Settings' page with the 'Registration' tab selected. Below the navigation tabs, there is a section for 'Registration Profiles' with a plus icon and a three-dot menu icon. The table below lists three profiles: Admin, General, and NewMember. Each profile has a 'New User Registration URL', a 'Require Email Verification' status, and an 'Enable / Disable' checkbox.

Registration Profile	New User Registration URL	Require Email Verification	Enable / Disable
Admin	https://kastrack.com/register/admin	Default (No)	☒ Enabled
General	https://kastrack.com/register/general	Default (No)	☒ Enabled
NewMember	https://kastrack.com/register/newmember	Default (No)	☒ Enabled

Selecting the plus icon to the right of the Registration Profile header is a quick link to the Create New Registration Profile Page. Selecting the three dot (...) icon opens a context menu with three options: Create, Import, and Export.



Registration profiles can be enabled/disabled via a checkbox in the rightmost column of the Registration Profile Table so that your organization has control of when this link is activated.

How To: Create Registration Profiles

To create a new registration profile, go to the Registration Tab in the Site Settings Module.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

Registration Profiles + ...

Registration Profile	New User Registration URL	Require Email Verification	Enable / Disable
Admin	https://.kastrack.com/register/admin	Default (No)	☒ Enabled
General	https://.kastrack.com/register/general	Default (No)	☒ Enabled
NewMember	https://.kastrack.com/register/newmember	Default (No)	☒ Enabled

Click the plus icon next to the Registration Profiles header or select “Create” from the three dot (...) icon context menu. This will open the Create Registration Profile Page.

The fields used in a Registration Profile are optional. You are not required to make selections for all when generating a new profile.

Create Registration Profile

Name

URL

https://trainingground.kastrack.com/register/

Access Levels

-- Level --

Add

Certification Roles

-- Certification Role --

Add

Supervisors

-- Supervisor --

Add

Who should be notified?

User or Role

Who approves new accounts?

User or Role

* Leave blank if no approval is required.

Require email verification?

Default (No)

* Default for all registration profiles can be set in Site Settings -> Email Settings.

Apply Notification Template

Default New User

* Any users who register with this profile will receive any notification emails/alerts identified in selected template. To review or edit notification templates, click here.

Send Welcome Email?

Yes

Redirect URL:

* After registering users will be redirected to this URL.

Note for new registrations

Note for existing users

Save

Cancel

Input a name for the new registration profile, which will automatically fill in the URL link textbox.

Create Registration Profile

Name

District Managers

URL

https://.kastrack.com/register/district-managers

Select any desired access level(s) for this registration profile from the dropdown menu list and click “Add”. Multiple Access Levels can be selected. The X icon to the left of the access level will remove the selection if it was made in error.

It is recommended to include at least one access level if this Registration Profile will be used to register new user accounts, as they must have an access level to see anything in KAStrack.

Access Levels

x Admin

Employee

Add

Select any desired Certification Role(s) for this registration profile from the dropdown menu list and click “Add”. Multiple Certification Roles can be selected. The X icon to the left of the Certification Roles will remove the selection if it was made in error.

Certification Roles

x JF General

x JF I9 Reqd

-- Certification Role --

Add

Select any desired supervisor(s) that are to be assigned to the new accounts that register with this profile from the dropdown menu list and click “Add”. Multiple supervisors can be selected. The X icon to the left of the supervisor will remove the selection if it was made in error.

Supervisors

x Michael Dupree

-- Supervisor --

Add

If desired, you can specify individual users and/or certification roles that are to receive notification of the new user account’s registration. When you type into the textbox, users and certification roles will show on a dropdown menu for selection. Multiple users and/or certification roles can be selected. The X icon to the left of the user / role will remove the selection if it was made in error.

If new registrations require approval, you can specify individual users and/or certification roles that are responsible for approving the new registrations. When you type into the textbox, users and certification roles will show on a dropdown menu for selection. Multiple users and/or certification roles can be selected. The X icon to the left of the user / role will remove the selection if it was made in error. Leave this field blank if no approval is required.

The default is set to not require email verification for new account generation, but you can select Yes or No from a dropdown menu. Users will then receive an email after registration asking them to verify their email address.

The default for all registration profiles can be set on the Email Settings Tab in the Site Settings Module, but the Registration Profile being created will override the default settings.

A default new user notification template is applied for all registration profiles.

Apply Notification Template

Default New User ▾

* Any users who register with this profile will receive any notification emails/alerts identified in selected template. To review or edit notification templates, click [here](#).

Any users who register with this profile will receive notification emails/alerts that have been specified through the new user template. The Default New User Notification Template details are shown on the Notification Templates Tab on the Settings Page of the Communications Module. Clicking the word “here” will redirect the user to the Notification Template Tab where the Default New User Template can be edited or a new notification template can be created for your organization’s preferences.

How To: Edit New User Notification Templates

To edit new user notification templates, go to the Notification Templates Tab on the Settings Page of the Communications Module.

Settings

Communications > Settings > Notification Tem

Module Settings

Notification Templates

Communication Templates

Account Settings

Alert Email Templates

Module Levels

Notification Templates

Default template to use for new accounts: Default New User ▾

Add Notification Template

Title	Description	Actions
Default New User		
Admins with Reports		
District Managers	This is the preferred notification settings for District Managers.	

Existing templates will be shown in the Notification Template Table.

Select the edit icon in the action column of the template you wish to edit opening the Edit Notification Template Page.

Communications > Settings > Notification Templates > Edit Tem

Settings

Module SettingsNotification TemplatesCommunication TemplatesAccount SettingsAlert Email TemplatesModule Levels

Edit Notification Template

Template Name

District Managers

Template Description

This is the preferred notification settings for District Managers.

A notification template is comprised of two parts: Reports and Alerts.

Indicate the desired status for email report notifications: Not Active or Active.

Reports

Status

Not Active

Actions

Do Not Receive

Assets

Do Not Receive

Documents

Do Not Receive

Finance

Do Not Receive

People

Do Not Receive

Reports

(Do Not Change)

Email Report Frequency

☒ Daily

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

☐ Weekly

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

☐ Monthly

* Months that do not have these days will instead be sent on the last day of the month

Alter the desired reports selected for each module or leave as “Do Not Receive”.

Email Report Frequency has three options: daily (or on specified days of the week), weekly (on the day of your choosing), or monthly (which requires the user to specify which numerical day of the month from a dropdown menu you wish to receive the report summary).

After setting template preferences for reports, scroll down to set template preferences for email alerts.

Alter email preferences as set by module through a dropdown menu with three options that designate when an email alert should be sent: “Real Time”, “Digest”, and “Do Not Receive”.

Alerts

Status

Active

Accounts

Real Time

Actions

Real Time

Assets

Real Time

Documents

Real Time

Finance

Real Time

Forms

Real Time

Meetings

Do Not Receive

People

Real Time

Save

Cancel

After making edits to your preferences for both Email Report and Email Alert Settings, select “Save”, returning you to the Notification Templates Tab on the Settings Page of the Communications Module.

The newly created notification template will now be shown on the Notification Template Table.

If you would like new user accounts that use this registration profile to receive a Welcome Email, select yes from the dropdown menu.

The default for all registration profiles can be set on the Email Settings Tab in the Site Settings Module, but the Registration Profile being created will override the default settings.

A redirect URL can be designated, so that any user registering with this profile will be redirected to the specified URL after registering.

Redirect URL:

* After registering users will be redirected to this URL.

Input a custom message for new registrations and a custom message for existing users if desired.

If an existing user logs in from a Registration Profile link, the access level(s), certification role(s), and supervisor(s) listed on the Registration Profile will be added to the user’s account. Any existing access levels, certification roles, and supervisors on their account

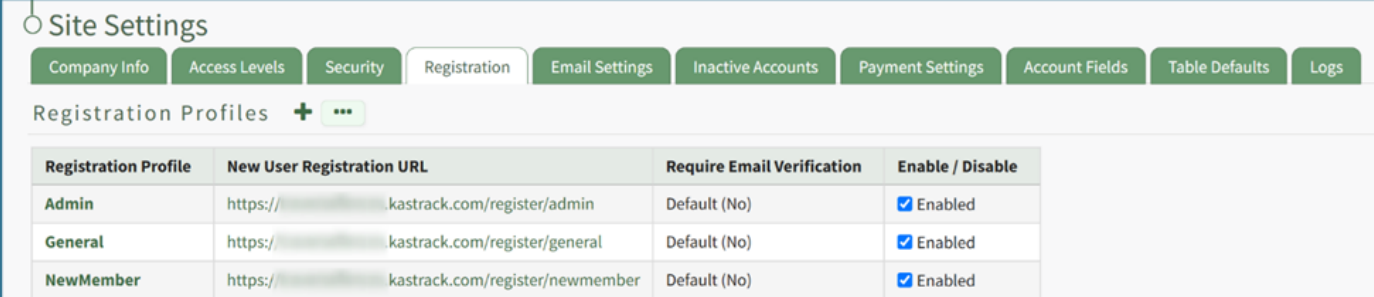
are not removed.

Select “Cancel” at any time to return to the Registration Profile Tab in the Site Settings Module without saving the profile. Select the “Save” button and the new registration profile now shows on the Registration Tab in the Registration Profile Table.

Registration profiles can be enabled/disabled via a checkbox in the Registration Profile Table so that your organization has control of when this link is activated.

How To: Import Registration Profiles

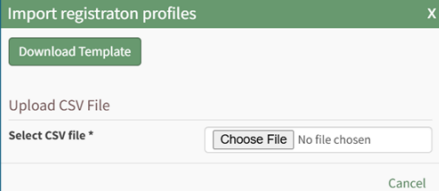
To import a CSV spreadsheet of existing registration profiles, go to the Registration Tab of the Site Settings Module.



The screenshot shows the 'Site Settings' module with the 'Registration' tab selected. Below the tab bar, there is a 'Registration Profiles' section with a plus icon and a three-dot menu icon. A table lists the registration profiles:

Registration Profile	New User Registration URL	Require Email Verification	Enable / Disable
Admin	https://[redacted].kastrack.com/register/admin	Default (No)	☒ Enabled
General	https://[redacted].kastrack.com/register/general	Default (No)	☒ Enabled
NewMember	https://[redacted].kastrack.com/register/newmember	Default (No)	☒ Enabled

Click the three dot (...) icon to open a context menu. Select “Import” opening the Import Registration Profiles Modal.



The screenshot shows the 'Import registration profiles' modal. It has a title bar with a close button (X). Inside, there is a 'Download Template' button. Below that, it says 'Upload CSV File'. There is a 'Select CSV file *' label, a 'Choose File' button, and a text box showing 'No file chosen'. At the bottom right, there is a 'Cancel' button.

Select the “Download Template” button to download a CSV file with 13 pre-labeled columns.

Access Level	Separate multiple Access Levels with a semi-colon
Certification Role	List the Company Name (from the Companies Page of the People Module) before the Certification Role Name with a space in-between the two; Separate multiple Certification Roles with a semi-colon Example: Company Name Certification Role
Supervisor	Separate multiple Supervisors with a semi-colon
Who Should be Notified	Separate multiple users or certification roles with a semi-colon
Who approves new accounts	Separate multiple users or certification roles with a semi-colon; Leave blank if no approval is required
Require email verification	Select “Yes” or “No”
Apply Notification Template	Input “Default New User” unless you have created a customized Notification Template (in the Communications Module) that you would prefer to use instead.
Send Welcome Email	Input “Yes” or “No”
Registration Note	Input a custom note to be included for new registrations.
Login Note	Input a custom note to be included for existing system users.

When all information has been included in the CSV file, save it with the CSV format UTF-8. Click the “Choose File” button or drag the CSV file into the Import Registration Profiles Modal.

The Import Registration Profile Modal expands.

After selecting your CSV, KAStack will scan the first row for matching column headers and attempt to map those column headers to the names of the Registration Profile settings fields.

The dropdown next to each field will automatically be set to any matching column headings from the CSV.

If a matching column couldn't be found, or if your import file uses column headers with different names than the Registration Profile settings fields, you can manually choose which column should map to those settings by choosing an option from the dropdown.

Select the “Import Profiles” button. If there are no issues with the imported CSV file, the new registration profiles will now show in the Registration Profiles Table.

If there were any issues during importing, the error will be explained in the Import Registration Profile Modal. Make the necessary changes and select the “Start Over” button to resubmit the corrected CSV file.

How To: Export Registration Profiles

To export a CSV spreadsheet of existing registration profiles, go to the Registration Tab of the Site Settings Module.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

Registration Profiles + ...

Registration Profile	New User Registration URL	Require Email Verification	Enable / Disable
Admin	https://.kastrack.com/register/admin	Default (No)	☒ Enabled
General	https://.kastrack.com/register/general	Default (No)	☒ Enabled
NewMember	https://.kastrack.com/register/newmember	Default (No)	☒ Enabled

Click the three dot (...) icon to open a context menu. Select “Export”.

The CSV file will automatically be downloaded to your personal device.