

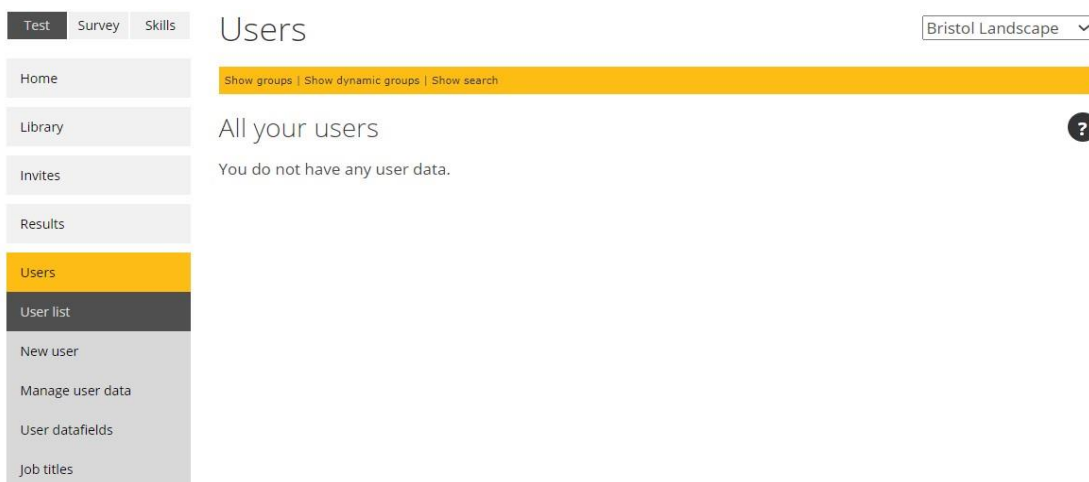
MANAGING USER RECORDS

KS administrators can upload a list of users into their dashboard and capture additional data against each user record, which can be used for searching and grouping Users, Invites and Results.

Here's how the process works:

Step one

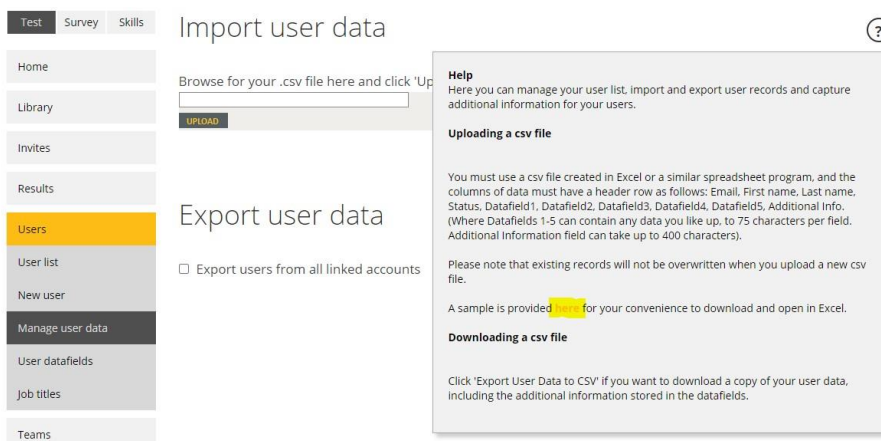
Go to the **Users > User list** page of your admin dashboard.



Step two

Use the CSV template to upload your user records, including completed datafield info, job title and manager status.

Go to the **Users > Manage user data** page. Hover over the help notes icon and look for the sample CSV template.



Step three

Populate the sheet with your user records and save as a CSV file.

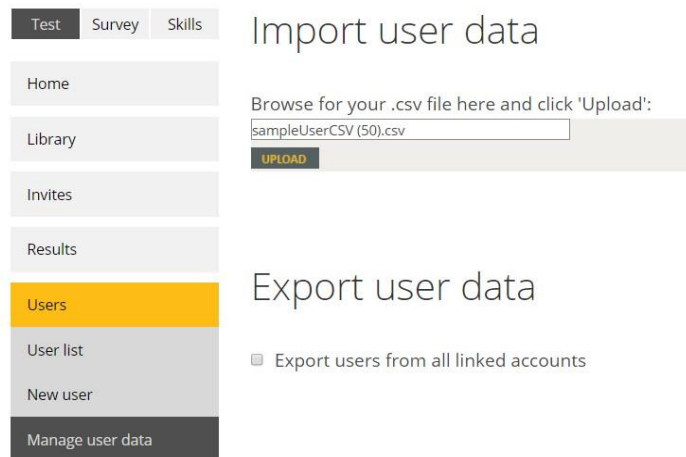
(Review the **User Datafields** help sheet for guidance on populating your user datafields).

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	UserFirstName	UserLastName	UserJobTitle	UserEmail	UserStatus	DataField1	DataField2	DataField3	DataField4	DataField5	AdditionalInfo	AccountName	IsManager
2	Dave	Jones	Architect	dave.jones@mycompany.com	Employee	New York	Architecture	123	Revit Architecture	Mary Jones	Anything related	My Account	FALSE
3	Paul	Picasso	Project Manager	paul.picasso@mycompany.com	Contractor	London	Civil Engineering	456	Civil 3D	Nelson Church	Anything related	My Account	FALSE
4	Jane	Smith	Engineer	jane.smith@email.com	Employee	Chicago	Structures	789	Revit Structure	Stuart Middle	Anything related	My Account	TRUE

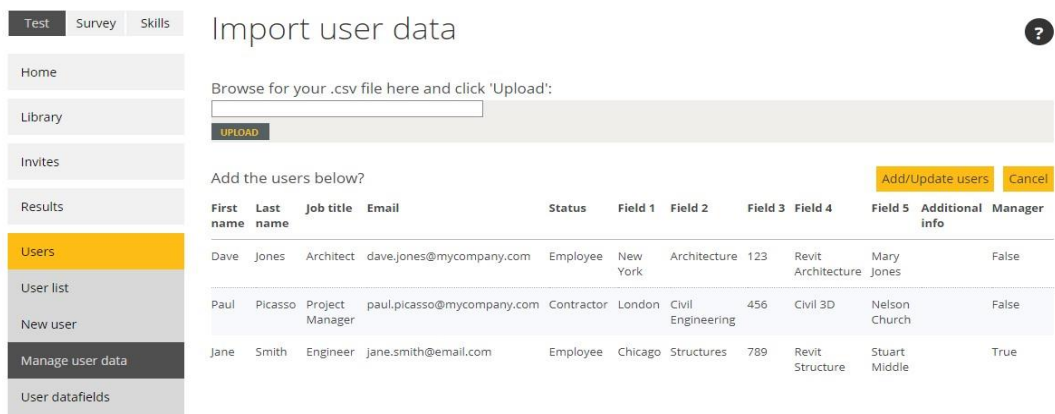
Note: The following columns are mandatory and must contain data. All other columns are optional. UserFirstName, UserLastName, UserEmail, UserStatus, AccountName.

Step four

Browse for your saved CSV file and click **Upload** to import your user list into the KS platform.



Click **Add/Update users** to complete your import of user data.



First name	Last name	Job title	Email	Status	Field 1	Field 2	Field 3	Field 4	Field 5	Additional info	Manager
Dave	Jones	Architect	dave.jones@mycompany.com	Employee	New York	Architecture	123	Revit Architecture	Mary Jones		False
Paul	Picasso	Project Manager	paul.picasso@mycompany.com	Contractor	London	Civil Engineering	456	Civil 3D	Nelson Church		False
Jane	Smith	Engineer	jane.smith@email.com	Employee	Chicago	Structures	789	Revit Structure	Stuart Middle		True

A message will appear giving you the option to send new or updated users a welcome email. This is optional and the choice is yours.

Send welcome email

Would you like to send new users a welcome email?

YES
NO

Step five

Go to the **Users > User list** page to view your user records.

Test Survey Skills

Home

Library

Invites

Results

Users

User list

New user

Manage user data

User datafields

Job titles

Users

[Show groups](#) | [Show dynamic groups](#) | [Show search](#)

All your users ?

Total users: 3
Send user welcome mail
Invite selected users
Delete

Username	Email	First name	Last name	Status	Manager	<input type="checkbox"/>
DaveJones1	dave.jones@mycompany.com	Dave	Jones	Employee	✘	<input type="checkbox"/>
JaneSmith1	jane.smith@email.com	Jane	Smith	Employee	✔	<input type="checkbox"/>
PaulPicasso	paul.picasso@mycompany.com	Paul	Picasso	Contractor	✘	<input type="checkbox"/>

First
Previous
Next
Last

Total users: 3

Select the 'Click to enable as manager' icon to assign Manager status to a user.

To view/edit records on a per user basis, go to the **Users > User list** page and click on the **View or edit user data** (magnifying glass) icon.

Test Survey Skills

Home

Library

Invites

Results

Users

User list

New user

Manage user data

User datafields

Job titles

Users

[Show groups](#) | [Show dynamic groups](#) | [Show search](#)

All your users ?

Total users: 3
Send user welcome mail
Invite selected users
Delete

Username	Email	First name	Last name	Status	Manager	<input type="checkbox"/>
DaveJones1	dave.jones@mycompany.com	Dave	Jones	Employee	✘	<input type="checkbox"/>
JaneSmith1	jane.smith@email.com	Jane	Smith	Employee	✔	<input type="checkbox"/>
PaulPicasso	paul.picasso@mycompany.com	Paul	Picasso	Contractor	✘	<input type="checkbox"/>

Job title:

Datafield 1:
 Datafield 2:
 Datafield 3:
 Datafield 4:
 Datafield 5:

Additional Information (Max. 400 characters)

Account: Bristol Landscape

To remove a user record, check the box next to the username and hit the **Delete** button.

New users will automatically be added to your user list when you send them a test invite. You can also add users individually on the **Users > New user** page.

Test Survey Skills

New user ?

Assign Manager Status

Email:
 First Name:
 Last Name:
 Status:
 Office:
 Team:

To export your user records, from individual or linked accounts, go to **Users > Manage user data** and use the **Export user data** tool.

Test Survey Skills Import user data ?

Home

Library

Invites

Results

Users

User list

New user

Manage user data

User datafields

Job titles

Browse for your .csv file here and click 'Upload':

UPLOAD

Export user data

Export users from all linked accounts

Export User Data to CSV

(Review the **User Datafields** help sheet for guidance on adding custom datafield labels).

You can review and edit a list of Job Titles on the Users > Job titles page.

Test Survey Skills Job titles

Home

Library

Invites

Results

Users

User list

New user

Manage user data

User datafields

Job titles

Teams

Settings

Accounts

Job Title	
Administrator	✓
Architect	✓
Architectural Assistant	✓
Associate	✓
BIM Coordinator	✓
BIM Manager	✓
BIM Modeler	✓
BIM Technician	✓
CAD Manager	✓
C-Level Role	✓
Construction Manager	✓
Contractor/General Contractor	✓
Designer	✓

Add new job titles using the custom field at the bottom of the main list.

Add new job title:

Add Job Title

That's it - you've built your KS user list. If you subsequently upload a new CSV with additional user records, then the new list will merge with the existing user records.

Please note that changes made to the data on the **Users** page will have no impact on your **Results** data.

(Review the **Individual User Pages** help sheet for information about individual user dashboards).