

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.

Test Survey Skills	Users	Bristol Landscape 🗸
Home	Show groups Show dynamic groups Show search	
Library	All your users	9
Invites	You do not have any user data.	
Results		
Users		
User list		
New user		
Manage user data		
User datafields		
Job titles		

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.

Test Survey Skills	Import user data	(?)
Home	Browse for your .csv file here and click 'Up	Help Here you can manage your user list, import and export user records and capture
Library	UPLOAD	additional information for your users.
Invites		Uploading a csv file
Results		You must use a csv file created in Excel or a similar spreadsheet program, and the columns of data must have a header row as follows: Email, First name, Last name, Status, Datafield, Datafield, Datafield, Datafield, Autafield, Auditional Info.
Users	Export user data	(Where Datafields 1-5 can contain any data you like up, to 75 characters per field. Additional Information field can take up to 400 characters).
User list	Export users from all linked accounts	Please note that existing records will not be overwritten when you upload a new csv file.
New user		A sample is provided here for your convenience to download and open in Excel.
Manage user data		Downloading a csv file
Job titles		Click 'Export User Data to CSV' if you want to download a copy of your user data, including the additional information stored in the datafields.
Job titles		including the additional information stored in the datafields.
Teams	l.	



Step three

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

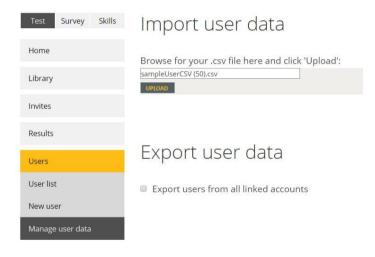
(Review the User Datafields help sheet for guidance on populating your user datafields).

	A	В	С	D	E	F	G	Н	- I	J	К	L	М
1	UserFirstName	UserLastName	UserJobTitle	UserEmail	UserStatus	DataField1	DataField2	DataField3	DataField4	DataField5	AdditionalInfo	AccountName	IsManager
2	Dave	Jones	Architect	dave.jones@r	Employee	New York	Architecture	123	Revit Archit	Mary Jones	Anything related	My Account	FALSE
3	Paul	Picasso	Project Manag	paul.picasso@	Contractor	London	Civil Enginee	456	Civil 3D	Nelson Church	Anything related	My Account	FALSE
4	Jane	Smith	Engineer	jane.smith@e	Employee	Chicago	Structures	789	Revit Struct	Stuart Middle	Anything related	My Account	TRUE

Note: The following columns are manadatory 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.

Test Survey Skills	Im	por	t use	er data								?
Home	Brow	se for v	our .csv	file here and click 'Upload	d':							
Library	UPLO											
Invites	Add t	he use	rs below	?						Add/	Jpdate users	Cancel
Results	First name	Last name	Job title	Email	Status	Field 1	Field 2	Field 3	Field 4	Field 5	Additional info	Manager
Users	Dave	Jones	Architect	dave.jones@mycompany.com	Employee	New York	Architecture	123	Revit Architecture	Mary Jones		False
User list New user	Paul	Picasso	Project Manager	paul.picasso@mycompany.com	Contractor	London	Civil Engineering	456	Civil 3D	Nelson Church		False
Manage user data	Jane	Smith	Engineer	jane.smith@email.com	Employee	Chicago	Structures	789	Revit Structure	Stuart Middle		True
User datafields												



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	Users	5						
Home	Show groups	Show dynamic groups Show search						
Library	All you	r users						?
Invites	Total users: 3			Send	l user welcome	mail Invite	selecte	d users Delete
Results	Username	Email	First name	Last name	Status	Manager		
Users	DaveJones1	dave.jones@mycompany.com	Dave	Jones	Employee	8		a 🖧 🚨 剑
User list	JaneSmith1	jane.smith@email.com	Jane	Smith	Employee	Ø	0	a 🕹 🕹 🕤
New user	PaulPicasso	paul.picasso@mycompany.com	Paul	Picasso	Contractor	8		a 🗸 🕹 🗐
Manage user data	First Previo	ous Next Last						Total users: 3
User datafields								
Job titles								

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.

Users	5						
Show groups	Show dynamic groups Show search						
All you	rusers						?
Total users: 3			Send	l user welcome mai	Invite	selecte	ed users Delete
Username	Email	First name	Last name	Status M	Aanager		
Davejones1	dave.jones@mycompany.com	Dave	Jones	Employee	8		<mark>.</mark> & & M
JaneSmith1	jane.smith@email.com	Jane	Smith	Employee	۲		a 🕿 🕿 🕄
PaulPicasso	paul.picasso@mycompany.com	Paul	Picasso	Contractor	8		a 🔈 🕹 🕤



DaveJones1	dave.jones@mycompany.	Dave	Jones	Employee 🗸 🗆
Job title	Architect	~		
Datafield 1		New York		
Datafield 2		Architecture		
Datafield 3		123		
Datafield 4		Revit Architecture		
Datafield 5		Mary Jones		
Additional Information	(Max. 400 characters)			
Account: Bristol Landscape		Update Cance	əl	

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	9
Home	Email	Job Title
Library		~
Invites	First Name	Industry Discipline
Results	Last Name	Work Sector Experience
Users		~
User list	Status	Additional Information
New user	Employee 🗸	
Manage user data	Office	
User datafields	~	Assign Manager Status
Job titles	Team	
Teams	~	Insert Clear

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	Browse for your .csv file here and click 'Upload':
Library	UPLOAD
Invites	
Results	
Users	Export user data
User list	Export users from all linked accounts
New user Manage user data	Export User Data to CSV
User datafields	
Job titles	

(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.

Home		
nome	Job Title	
Library	Administrator	0
Invites	Architect	٢
Results	Architectural Assistant	0
Users	Associate	0
User list	BIM Coordinator	٢
New user	BIM Manager	0
Manage user data	BIM Modeler	0
User datafields Job titles	BIM Technician	0
•	CAD Manager	0
Teams	C-Level Role	٢
Settings	Construction Manager	٢
Accounts	Contractor/General Contractor	۵
	Designer	0

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).