

USER DATAFIELDS

It is possible to assign 5 datafield values against your user records. These are extremely valuable for filtering and creating groups and dynamic groups for your **Users**, **Invites** and **Results** data.

Correctly populated datafields will help you create a variety of reports and charts for your management team.




To view the datafields 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

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	
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"/> 

DaveJones1	dave.jones@mycompany	Dave	Jones	Employee	<input type="checkbox"/>
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Job title

Datafield 1

Datafield 2

Datafield 3

Datafield 4

Datafield 5

Additional Information (Max. 400 characters)

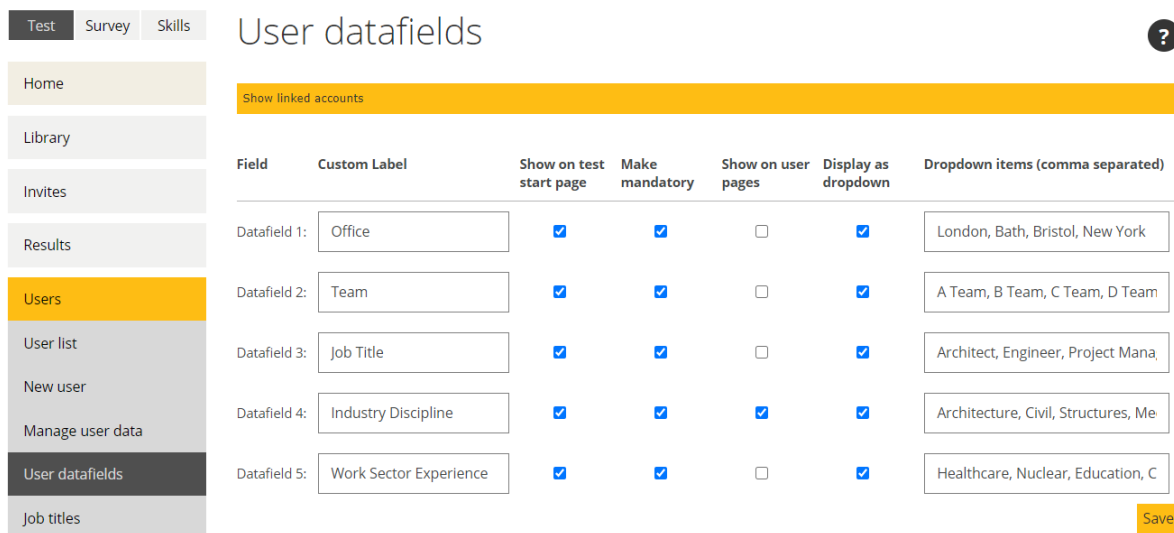
Account:
Bristol Landscape Update Cancel

Here are some examples of typical values captured in the user datafields:

- Office or Studio location, i.e. London, New York, Chicago, Berlin, Copenhagen
- Job Title, i.e. Architect, Engineer, Designer, Project Manager, Director, Manager (NB, this value can also be captured separately against user records)
- Industry Discipline, i.e. Architecture, Civil, Mechanical, Electrical, Plumbing/HVAC
- Business Unit or Division
- Project Team Name
- Director or Manager Name
- Software Title, i.e. Revit Architecture, Revit MEP, Revit Structure, AutoCAD, Civil 3D

Adding custom datafield labels

KS administrators can add custom labels to the datafields on the **Users > User datafields** page. Enter the relevant label for each datafield in the **Custom Label** fields and click **Save** to register your changes.



Field	Custom Label	Show on test start page	Make mandatory	Show on user pages	Display as dropdown	Dropdown items (comma separated)
Datafield 1:	Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	London, Bath, Bristol, New York
Datafield 2:	Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	A Team, B Team, C Team, D Team
Datafield 3:	Job Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Architect, Engineer, Project Mana
Datafield 4:	Industry Discipline	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Architecture, Civil, Structures, Me
Datafield 5:	Work Sector Experience	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Healthcare, Nuclear, Education, C

Populating user datafields

There are 3 different ways to populate your user datafields.

Option 1

Use the CSV template to upload your user records, including completed datafield info.

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

Test Survey Skills

- Home
- Library
- Invites
- Results
- Users
- User list
- New user
- Manage user data
- User datafields
- Job titles
- Teams

Import user data ?

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

UPLOAD

Help
Here you can manage your user list, import and export user records and capture additional information for your users.

Uploading a csv file

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, Datafield1, Datafield2, Datafield3, Datafield4, Datafield5, Additional Info. (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).

Please note that existing records will not be overwritten when you upload a new csv file.

A sample is provided [here](#) for your convenience to download and open in Excel.

Downloading a csv file

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.

Export user data

Export users from all linked accounts

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

A	B	C	D	E	F	G	H	I	J	K	L
UserFirstName	UserLastName	UserJobTitle	UserEmail	UserStatus	DataField1	DataField2	DataField3	DataField4	DataField5	AdditionalInfo	IsManager
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

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

Test Survey Skills

- Home
- Library
- Invites
- Results
- Users
- User list
- New user
- Manage user data

Import user data

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

UPLOAD

Export user data

Export users from all linked accounts

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

- Test
- Survey
- Skills
- Home
- Library
- Invites
- Results
- Users**
- User list
- New user
- Manage user data
- User datafields

Import user data



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

UPLOAD

Add the users below?

Add/Update users Cancel

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

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

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	
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)

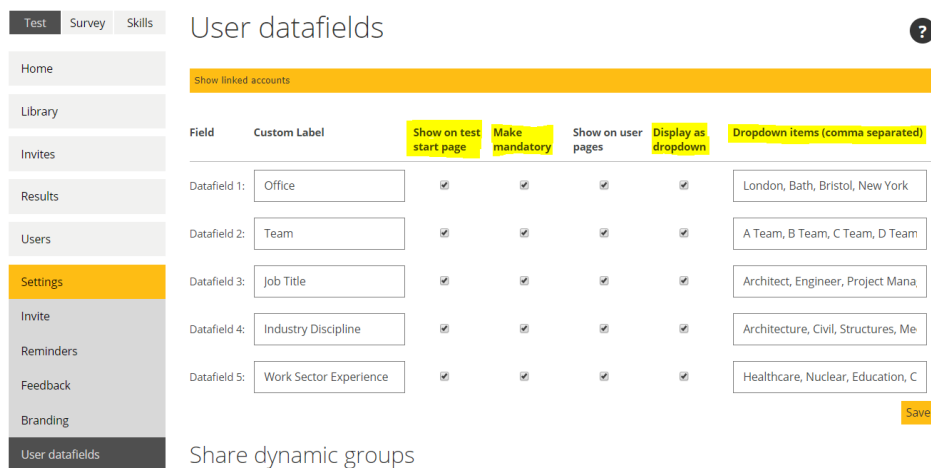
Account:
Bristol Landscape

Update Cancel

Option 2

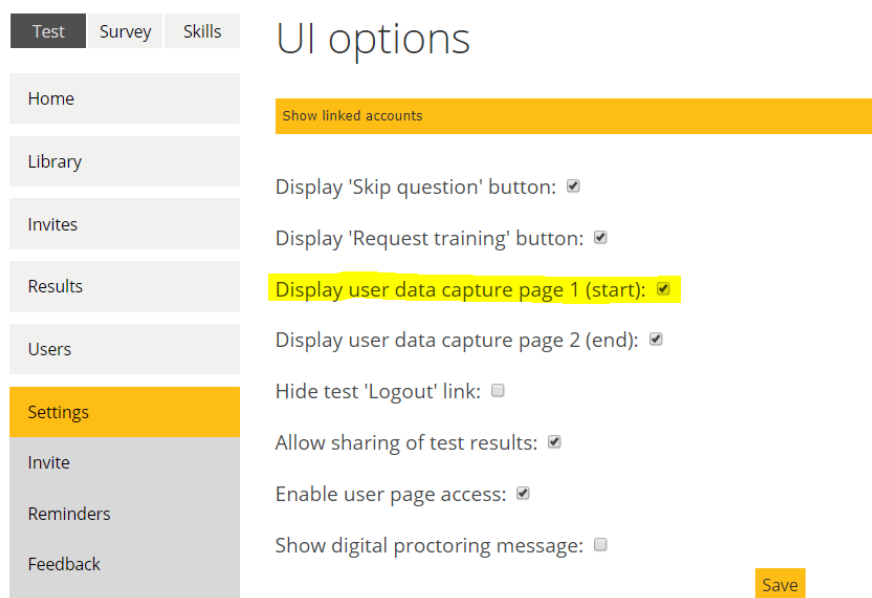
Instruct your users to populate the user datafields on their test session start page.

Go to the **Settings > User datafields** page. Check the boxes in the **Show on test start page** column and decide if you want to make them optional or **mandatory**. You can ask users to fill in the datafields as a free text field or, if you prefer, you can display pre-defined values in a dropdown. To do this, enter your datafield choices in the **Dropdown items (comma separated)** column, as **comma separated** values. Click **Save** to register your changes.



Field	Custom Label	Show on test start page	Make mandatory	Show on user pages	Display as dropdown	Dropdown items (comma separated)
Datafield 1:	Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	London, Bath, Bristol, New York
Datafield 2:	Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A Team, B Team, C Team, D Team
Datafield 3:	Job Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Architect, Engineer, Project Mana
Datafield 4:	Industry Discipline	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Architecture, Civil, Structures, Me
Datafield 5:	Work Sector Experience	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Healthcare, Nuclear, Education, C

Next, go to the **Settings > UI options** page and check the box called, **Display user data capture page 1 (start)**.



UI options

Show linked accounts

Display 'Skip question' button:

Display 'Request training' button:

Display user data capture page 1 (start):

Display user data capture page 2 (end):

Hide test 'Logout' link:

Allow sharing of test results:

Enable user page access:

Show digital proctoring message:

Save

When a user logs in to take their test, they will be prompted to complete this data before they proceed to their test login page.

Before you begin, please check and amend where necessary the following brief user profile fields, which will help your organisation to develop a tailored training plan for you. You can view and edit your user profile data at any time via your KnowledgeSmart user profile page

Office	<input type="text"/>	Team	<input type="text"/>
Job Title	<input type="text"/>	Industry Discipline	<input type="text"/>
Work Sector Experience	<input type="text"/>		
Primary Industry/Discipline:	<input type="text" value="Engineering - Structural"/>	Primary Role:	<input type="text" value="Associate/VP-Level"/>
Country:	<input type="text" value="United States"/>	State:	<input type="text" value="New York"/>

Option 3

Ask your users to populate the user datafields on their individual KS user profile page.

Go to the **Settings > User datafields** page. Check the boxes in the **Show on user pages** column. Once again, you can ask users to fill in the datafields as a free text field or, if you prefer, you can display pre-defined values in a dropdown. Click **Save** to register your changes.

Test
Survey
Skills

User datafields ?

Show linked accounts

Field	Custom Label	Show on test start page	Make mandatory	Show on user pages	Display as dropdown	Dropdown items (comma separated)
Datafield 1:	<input type="text" value="Office"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	London, Bath, Bristol, New York
Datafield 2:	<input type="text" value="Team"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A Team, B Team, C Team, D Team
Datafield 3:	<input type="text" value="Job Title"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Architect, Engineer, Project Mana,
Datafield 4:	<input type="text" value="Industry Discipline"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Architecture, Civil, Structures, Me
Datafield 5:	<input type="text" value="Work Sector Experience"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Healthcare, Nuclear, Education, C

Save

Share dynamic groups

Next, go to the Settings > UI options page and check the box called, **Enable user page access**.

Test Survey Skills **UI options**

- Home
- Library
- Invites
- Results
- Users
- Settings**
- Invite
- Reminders
- Feedback

Skills mode
Coming soon

Show linked accounts

Display 'Skip question' button:

Display 'Request training' button:

Display user data capture page 1 (start):

Display user data capture page 2 (end):

Hide test 'Logout' link:

Allow sharing of test results:

Enable user page access:

Show digital proctoring message:

Save

When the user logs in to their personal KS user dashboard page, they need to click on the **My Details** link. The editable user datafields will display on the right side of the screen.

My Details
Here you can edit your KS profile details, password and image.

>> Change my password

Old password:

New password:

Confirm new password:

Save

>> About me

Email Address:

Primary Industry/Discipline:


Primary Role:

Country:

State:

Save

>> Profile picture



(For best results upload a square image 300px wide.)

Change

Save

>> Teams I belong to

Team ID	Manager ID
Team Alpha	Team Manager
A Team	Team Manager

Linked Accounts

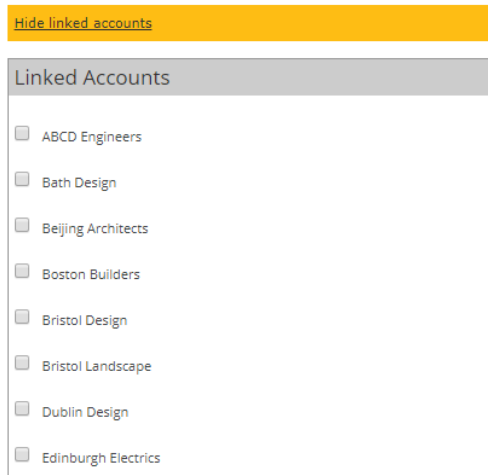
If you have two or more accounts, you can assign **Settings** changes across multiple accounts at the same time.

Click on the **Show linked accounts** link in the orange bar.



Show linked accounts

Select the account(s) you want to be included in your Settings update and hit the **Save** button to register your changes.



Hide linked accounts

Linked Accounts

- ABCD Engineers
- Bath Design
- Beijing Architects
- Boston Builders
- Bristol Design
- Bristol Landscape
- Dublin Design
- Edinburgh Electrics