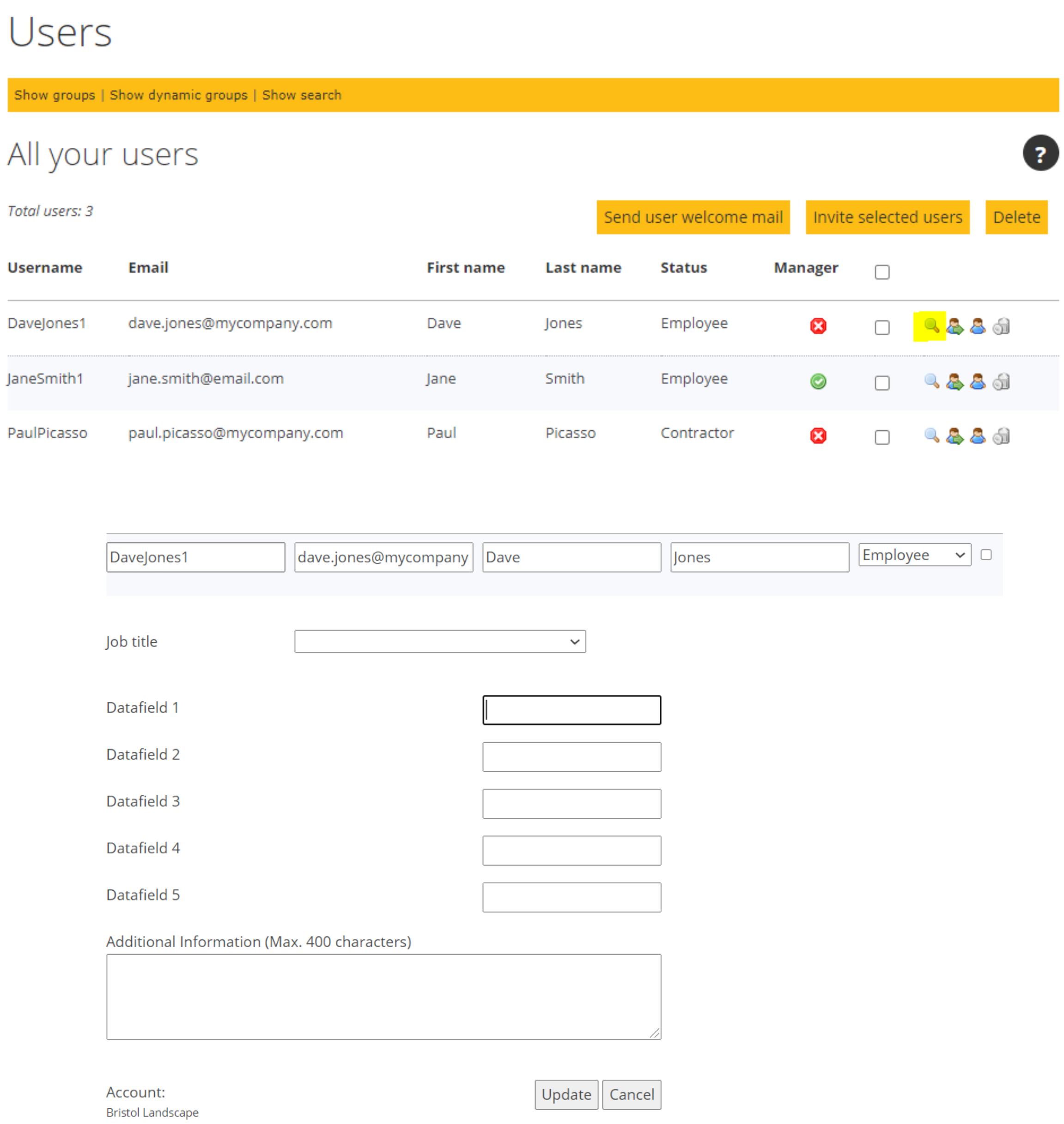
KNOWLEDGE SMART

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.

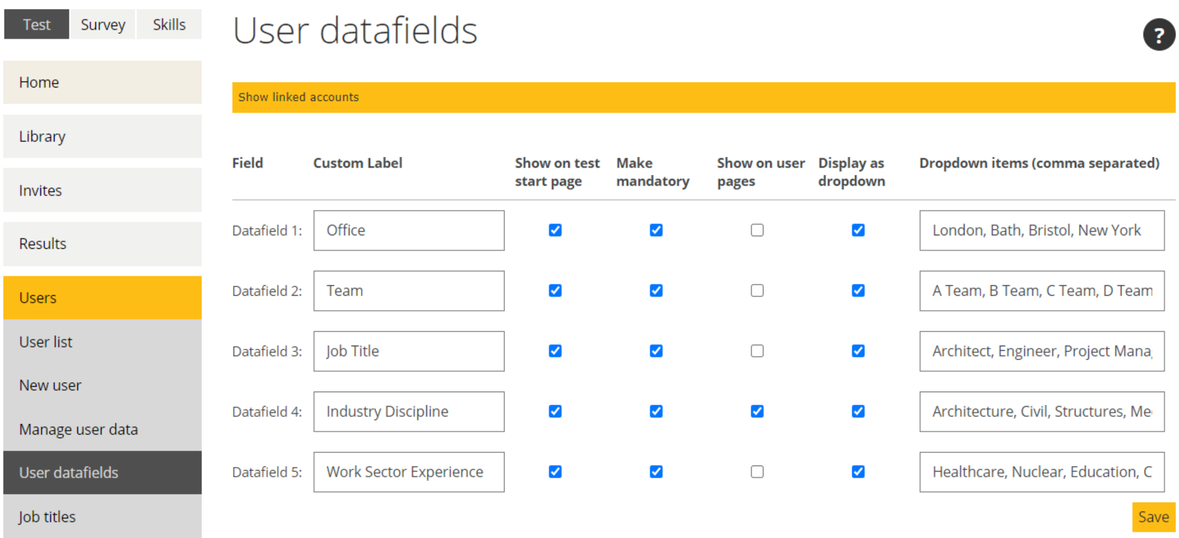


Here are some examples of typical values captured in the user datafields:

- 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.



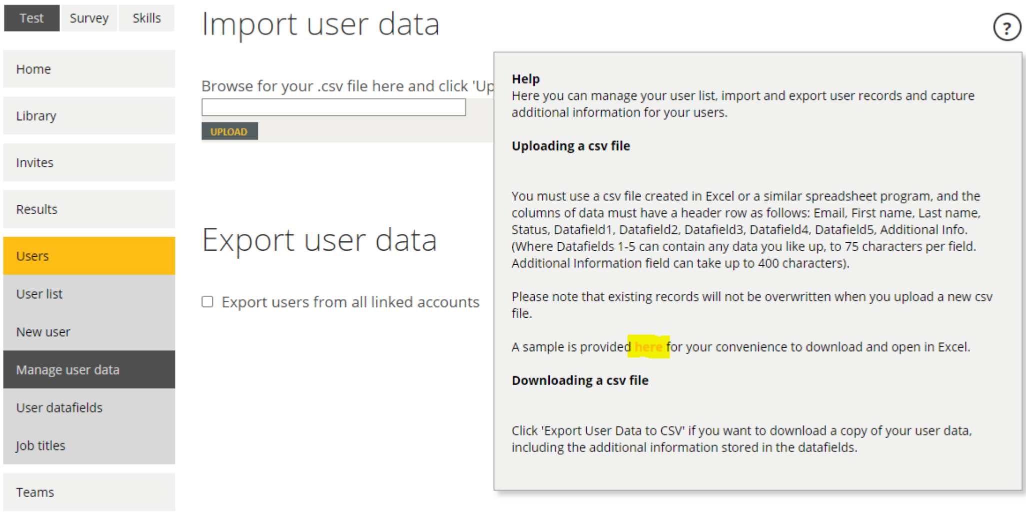
Populating user datafields

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.

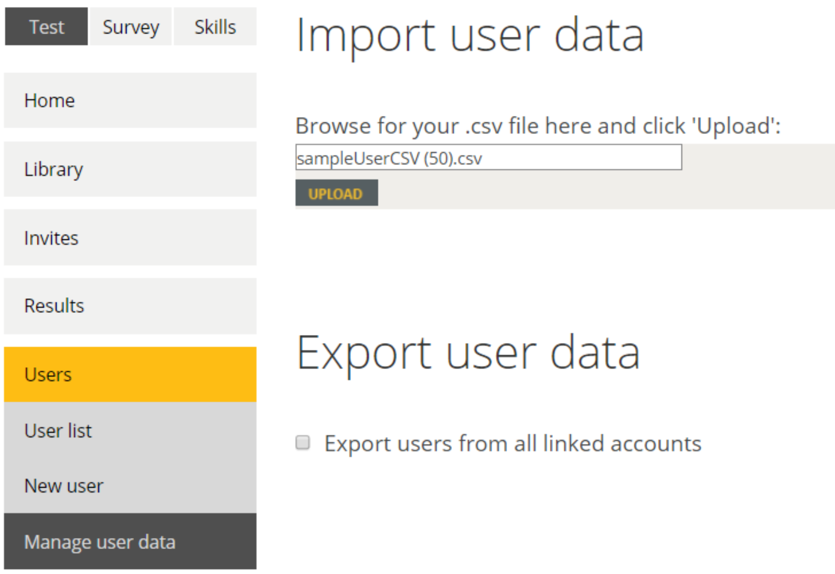
Go to the **Users > Manage user data** page. Hover over the help notes icon and look for the sample CSV template.



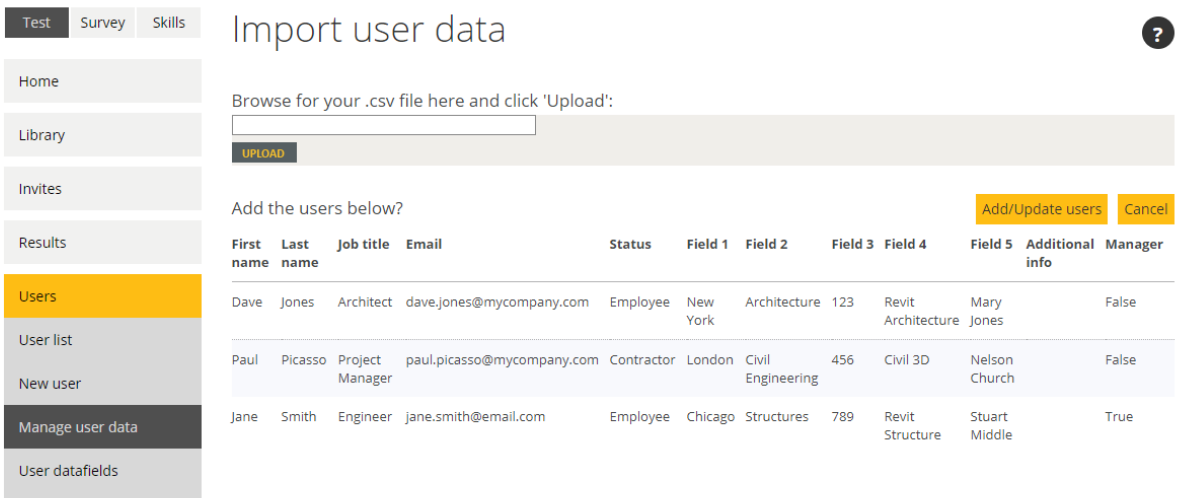
Populate the sheet with your user records and save as a CSV file.

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.

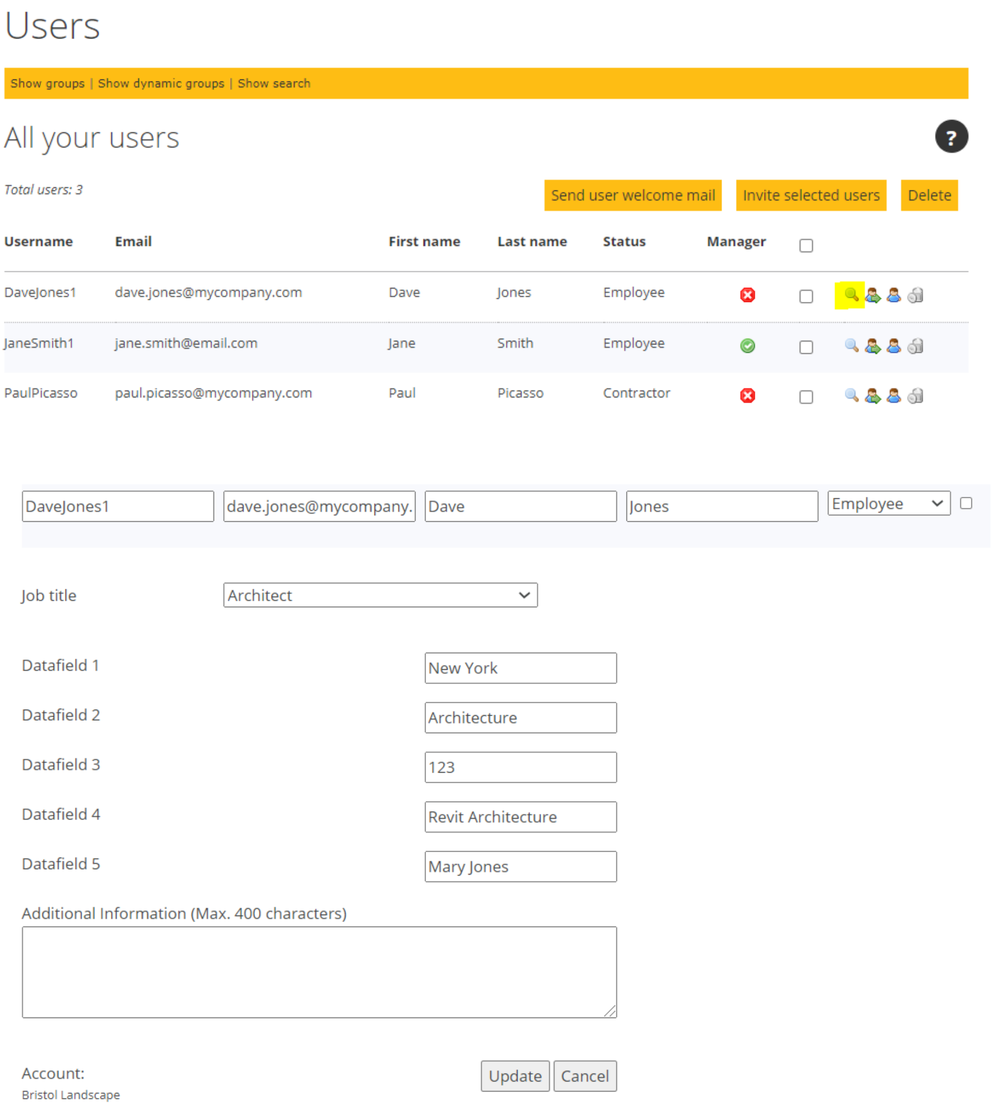


Click **Add/Update users** to complete your import of user data.



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

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

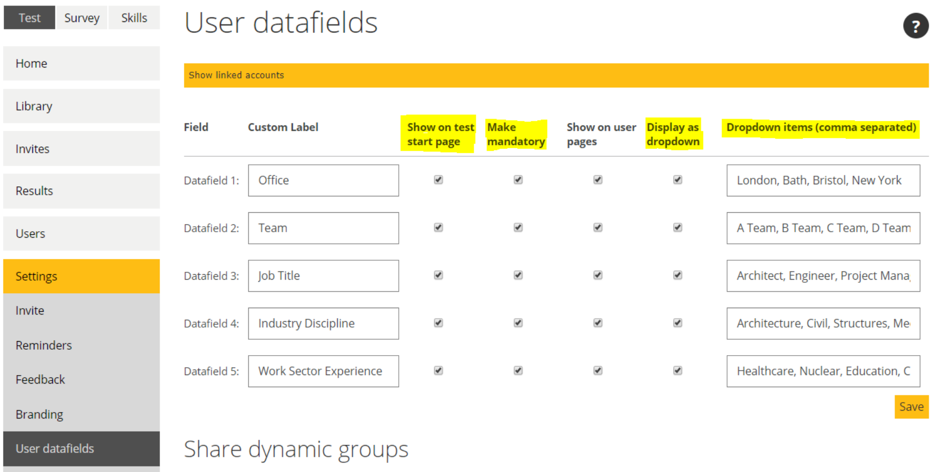


Username	Email	First name	Last name	Status	Manager
DaveJones1	dave.jones@mycompany.com	Dave	Jones	Employee	
JaneSmith1	jane.smith@email.com	Jane	Smith	Employee	
PaulPicasso	paul.picasso@mycompany.com	Paul	Picasso	Contractor	

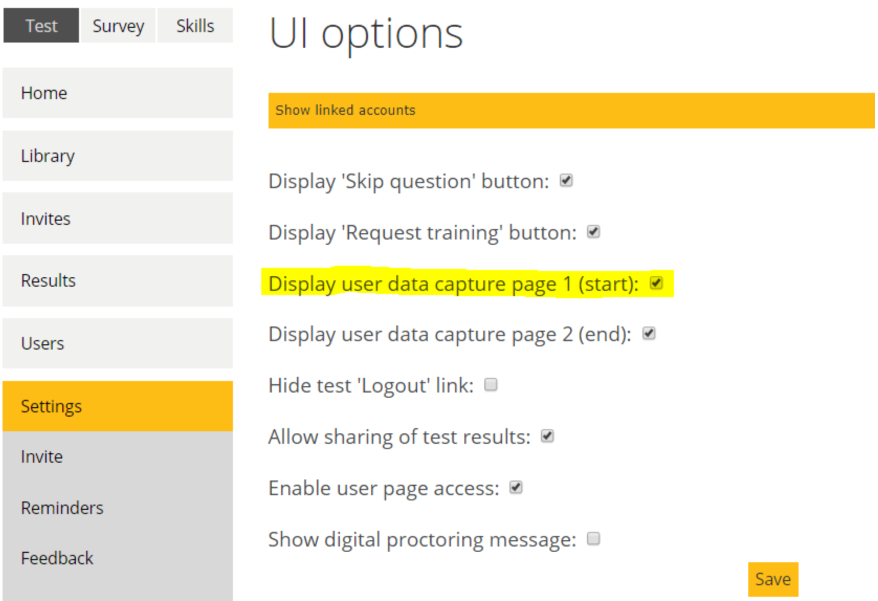
Option 2

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

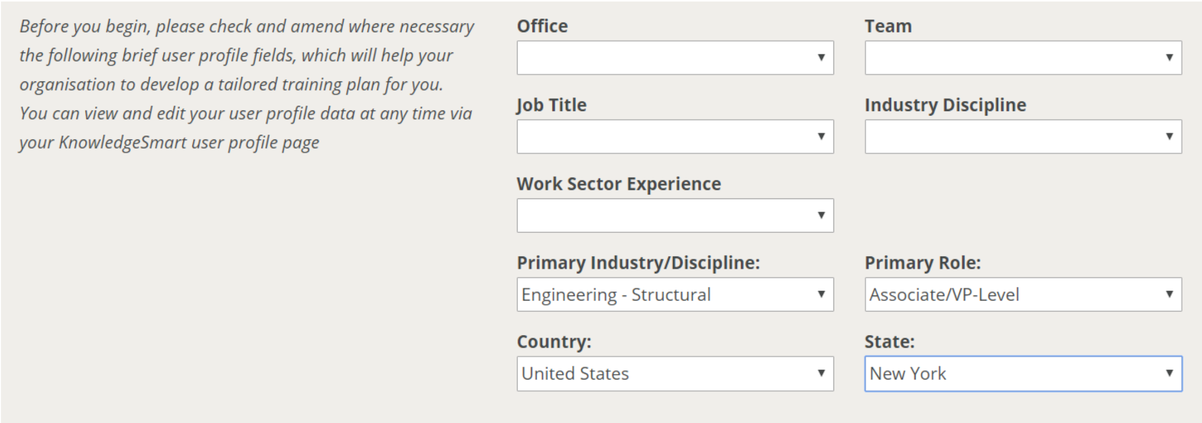
Go to the **Settings > User datafields** page. Check the boxes in the **Show on test start page** column and decide if you want to make them optional or **mandatory**. You can ask users to fill in the datafields as a free text field or, if you prefer, you can display pre-defined values in a dropdown.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



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



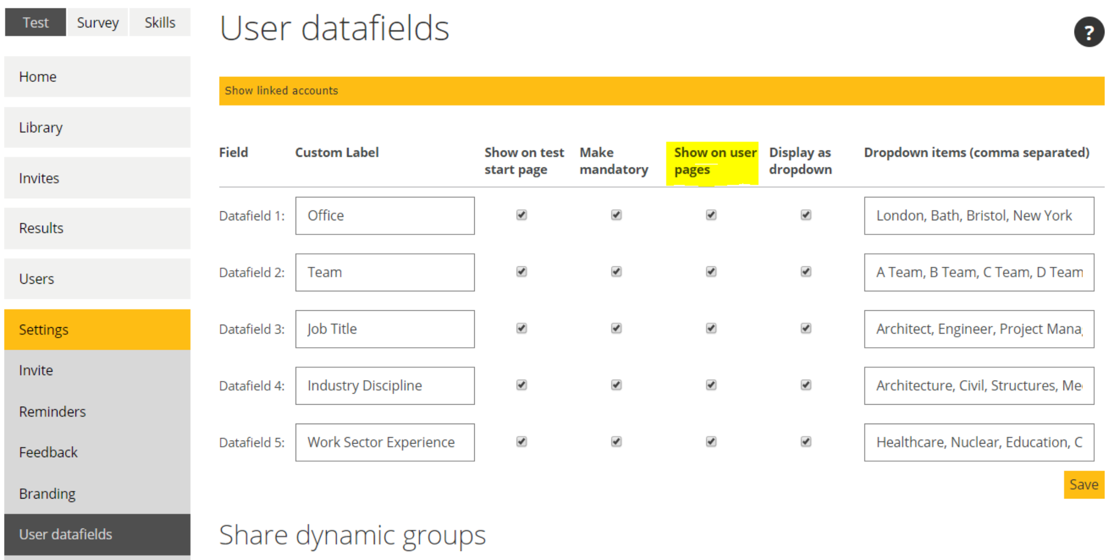
When a user logs in to take their test, they will be prompted to complete this data before they proceed to their test login page.



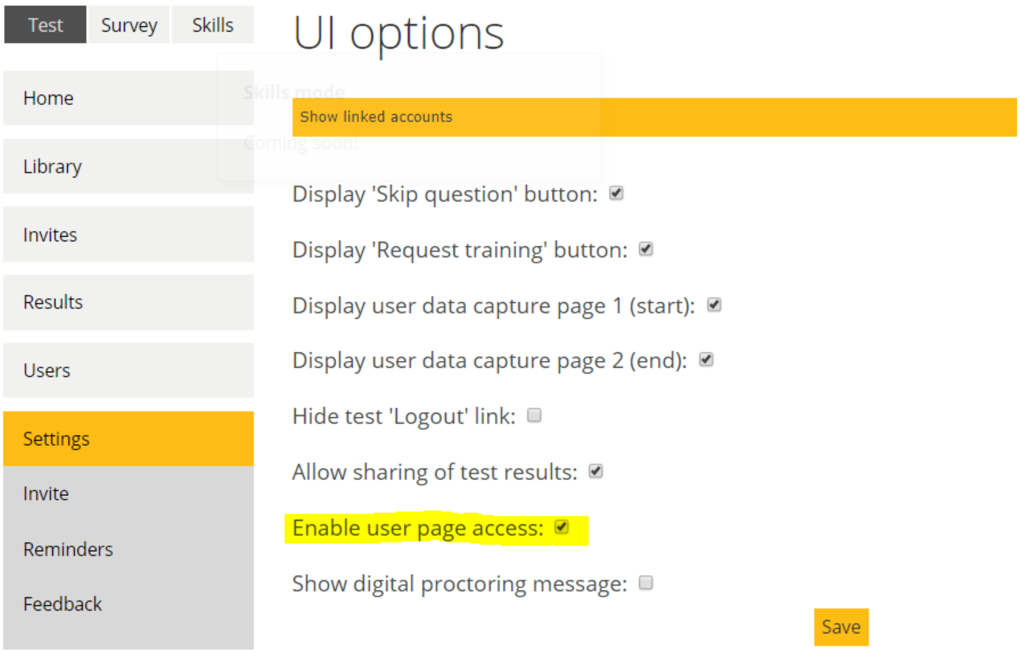
Option 3

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

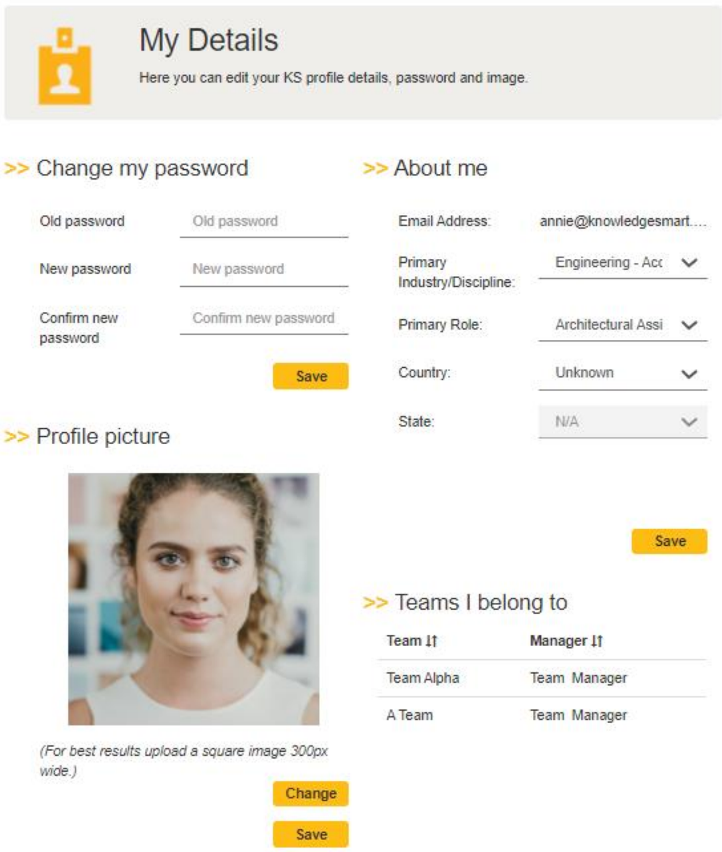
Go to the **Settings > User datafields** page. Check the boxes in the **Show on user pages** column. Once again, you can ask users to fill in the datafields as a free text field or, if you prefer, you can display pre-defined values in a dropdown. Click **Save** to register your changes.



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



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.



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.

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