

## User Management

From the Admin Portal, those with permissions will be able to add and edit user information, as well as grant access to levels and level values.

To access **User Management**, you must be set up with permissions as a Survey Admin. Please submit a request to your Project Manager or Account Manager for them to add the **Survey Admin** access to your user account.




### Table of Contents

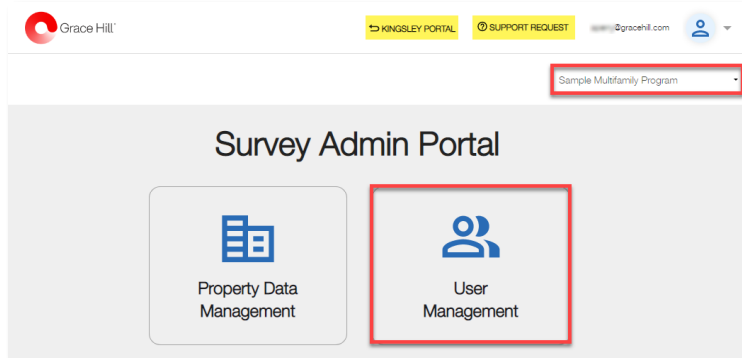
[Click on a topic below to be navigated directly to the section of the guide.](#)

<b>Accessing the Survey Admin Portal</b> .....	1
<b>User Management Dashboard</b> .....	2
<b>Add a User</b> .....	3
<b>Edit a User</b> .....	4
<b>Assign/Unassign Level Access to a User</b> .....	4
<b>Copy Access to a User</b> .....	6
<b>Replace Access for Users</b> .....	7
<b>Export Access Data for a User</b> .....	8
<b>Assign/Unassign Multiple Users from Levels/Groups</b> .....	8
<b>Export Access Data for all Users</b> .....	10

### Accessing the Survey Admin Portal

Follow the below instructions to access the KingsleySurveys Admin Portal.

1. Log in to the KingsleySurveys Portal, then select the  **Survey Admin Portal** link in the top right-hand corner of the screen.
2. You'll land on the Survey Admin Portal homepage where tiles will display depending on your access.
  - o Click the  **Kingsley Portal** link to return to the KingsleySurveys Dashboard.
  - o If you need assistance from our Support Team, click the  **Support Request** link to fill out a form. Or call (866) 472-2344 from 8:30am – 5:30pm ET Monday through Friday.
  - o Click on your email address in the top right-hand corner of the screen to be navigated to your Manage Account page where you can change your password for the KingsleySurveys Portal.
  - o Hover over the blue avatar in the top right-hand corner of the screen to be signed out of the portal by selecting the Log out option that displays.
  - o All Survey Admin users will have access to the **User Management** tile where you can add and edit user information, as well as grant access levels to users.



## User Management Dashboard

- From the Survey Admin Portal, select the **User Management** tile to be directed to a listing of all users in the KingsleySurveys portal to include their Active status, Email Address, First Name, Last Name, Title, and Last Login Date, if applicable. From here you can:
  - Select and toggle between the program option(s) you have available from the drop-down menu provided in the top right-hand corner of the screen.
  - Use the **Search** field to locate a specific user. As you type, a listing of applicable users will be listed.
  - The **Show Only Active Users** checkbox will automatically be selected to display active users in the listing by default. Uncheck to the box to view a listing of all users in the system, both active and inactive.
  - Select a column header to sort the column in ascending or descending order.
  - Scroll through the listing of users with your mouse or use the scrollbar on the right.
  - To return to the admin portal homepage, in the breadcrumb trail at the top-left corner, click the **Survey Admin Portal** link.

Survey Admin Portal / User Management ← breadcrumb trail

Select needed program → Employee Engagement Survey - Sample

### User Management

test  Show Only Active Users Level Access + Add User

Active	Email Address	First Name	Last Name	Title	Last Login	
<input checked="" type="checkbox"/>	admin@gracehilltest.com	Admin	Test			<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	community-manager@test.com				10/18/2021 12:02 PM	<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	multifamily@test.com					<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	propertymanager@test.com	Property	Manager			<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	property-manager@test.com				10/04/2022 05:21 PM	<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	regional-manager@test.com					<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	rttest@grace.com					<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	testadmin@test.com	Test	Admin			<a href="#">Edit User</a> <a href="#">Edit Access</a>
<input checked="" type="checkbox"/>	testadmin@test1.com	Admin	Test			<a href="#">Edit User</a> <a href="#">Edit Access</a>

## Add a User

Follow the below instructions to add a new user to the KingsleySurveys Portal. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

4. From the **User Management** homepage, click the **+ Add User** button.
5. The **Add User** pop-up window will appear. From here, complete the below:
  - o Enter the **First Name**, **Last Name**, *Title (optional)*, and **Email Address** for the new user. Fields with an asterisk are required.
  - o The **Active** checkbox for the new user will automatically be selected.

Add User

Create a new user by filling in the fields below.

First Name\*

Admin

Last Name\*

Test

Title(s)

Email Address\*

This email address is already in use

testadmin@test.com

Active

Add

**i** All individual user email addresses must be unique, therefore when creating new users, a duplicate email address will not be allowed in the system.

- o Click the **Add** button to create the new user.
- o A **Success!** pop-up message will display stating, “Would you like to go to the *Edit User Access* page for [First Name Last Name]?”. Select **Yes** to be navigated to edit the user’s access or select **No** to return to the User Management homepage.

Success!


Would you like to go to the Edit User Access page for **Test Admin**?

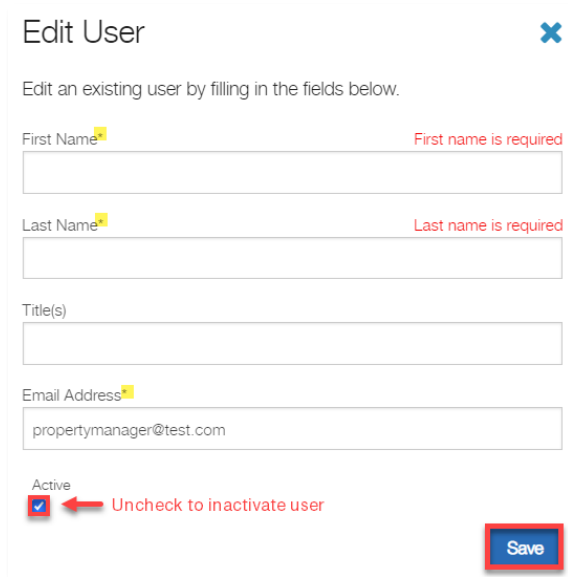
No Yes

- When selecting **Yes**, you’ll be navigated to the Edit User Access page. Proceed to the [Assign Level Access to a User](#) section of this guide, step 12, for instructions.

## Edit a User

To edit/add user information or inactivate a user, follow the below steps. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

6. From the **User Management** homepage, find the user you'd like to edit and click  **Edit User**.
7. The **Edit User** pop-up window will appear with the current user's information.
  - o Edit or add user information in the fields for **First Name**, **Last Name**, Title (*optional*), and **Email Address**. Fields with an asterisk are required.
  - o To **inactivate** the user, uncheck the **Active** checkbox.
  - o Click **Save** to save changes for the user and return to the User Management homepage.




*When a user is made inactive, they will not have the ability to log in to the KingsleySurveys Portal or reset their password.*


8. The edited information for the user should now be displayed in the user listing.



*At this time, inactive users will still receive email notifications and digests. To have notifications stopped for an inactive user, please submit a support request through the system.*

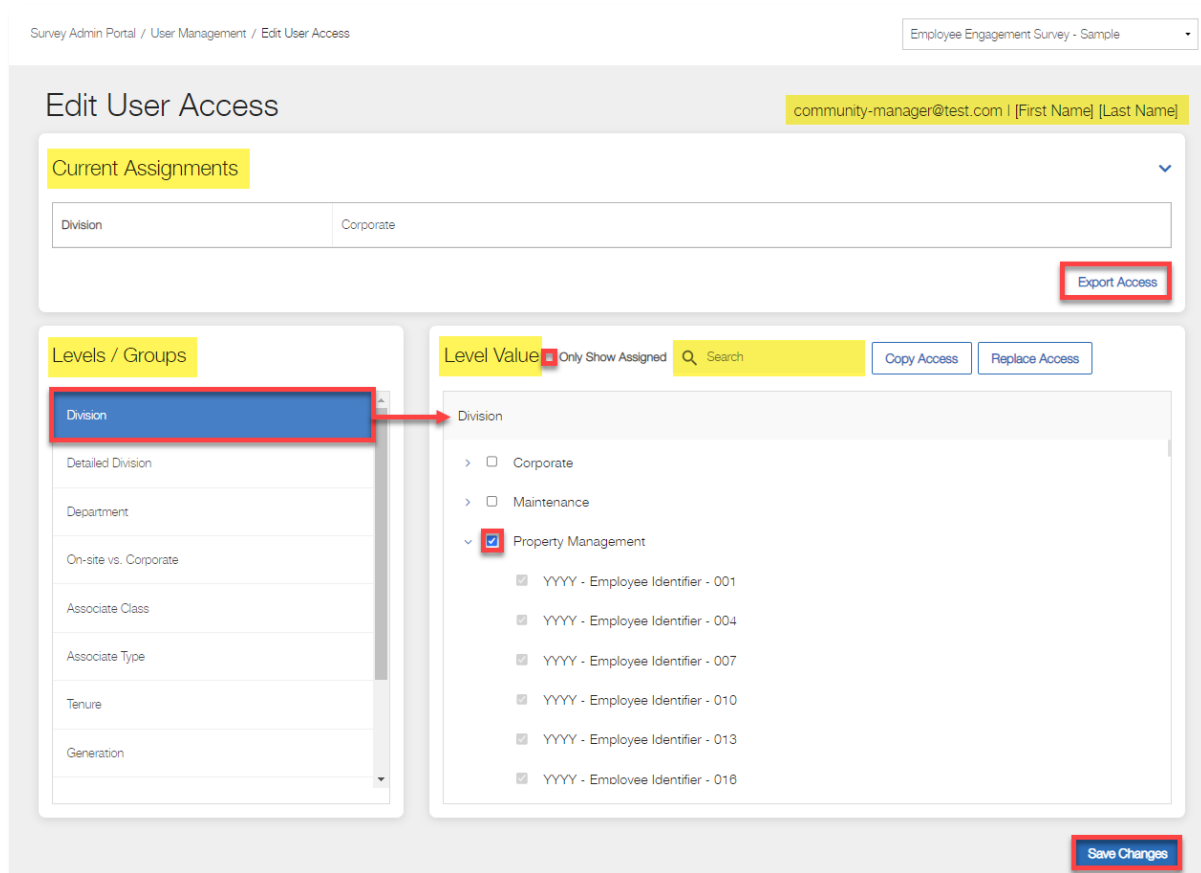
## Assign/Unassign Level Access to a User

Follow the below instructions to assign, edit, or remove access level(s) from a user. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

9. From the **User Management** homepage, find the user you'd like to edit and click  **Edit Access**.
10. The Edit User Access page will display with the below information:
  - o Top-right corner will display the user's email address, followed by their First and Last Name.
  - o The **Current Assignments** section will list any levels assigned to the user. If none are assigned, a message states, "No properties are assigned."

## Assign/Unassign Level Access to a User *(continued)*

- If access levels have been assigned, an **Export Access** button will appear. When clicked, an Excel file will be downloaded to your computer and when clicked, the file will open containing user information for their username, program name, level, and level value they have access to.
    - The **Levels/Groups** column on the left will list all the levels that have been set up in the system.
    - The **Level Value** section will list the level values included in the selected Level/Group.
    - Check the **Only Show Assigned** box in the Level Value section to display only the levels that are currently assigned to the user. This allows for easy access to unselect any needed items.
    - Use the Search field to find a specific Level Value.
11. Select the **Level/Group** needed for the user. A listing of all Level Values for the selection will display.
  12. Then, in the **Level Value** section, click the applicable checkboxes needed for the user.
  13. Lastly, click **Save Changes**.

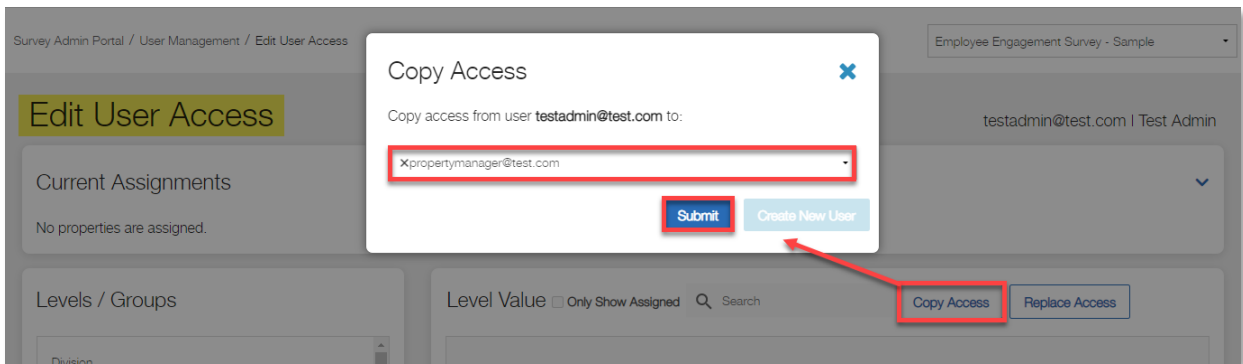


14. A Success! pop-up window will appear stating, “Changes have been saved.” Click OK.
15. To **unassign** access from a user, select the needed Level/Group, then uncheck the box(es) from the Level Value that needs to be taken away from the user’s access. Then, select **Save Changes** and click **OK** on the Success! pop-up message that displays.

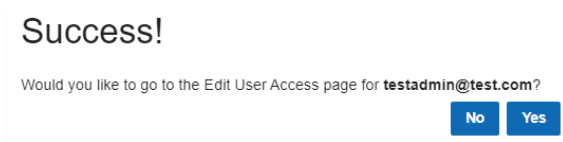
## Copy Access to a User

Follow the below instructions to copy access from one user to another. This can be helpful when a user is promoted or moved to a different position and needs the same access as another user. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

16. From the User Management homepage, click [Edit Access](#) for the user to copy the access from.
17. Next, select the **Copy Access** button.
18. The Copy Access pop-up window will appear. In the text field provided, type in the name of the user you'd like to copy the access to. As you type, a listing of users will appear for you to select.
  - o If you need to add a new user, leave the text field blank and click the **Create New User** button. Enter the required fields for First Name, Last Name, Title(s) (*optional*) and Email Address, then click **Submit**.
19. Once a user is selected to be copied, click **Submit**.



20. A pop-up window will appear with a Success! message
  - o Select **No** to return to the Edit User Access page.
  - o Select **Yes** to be navigated to the copied user's Edit User Access page.



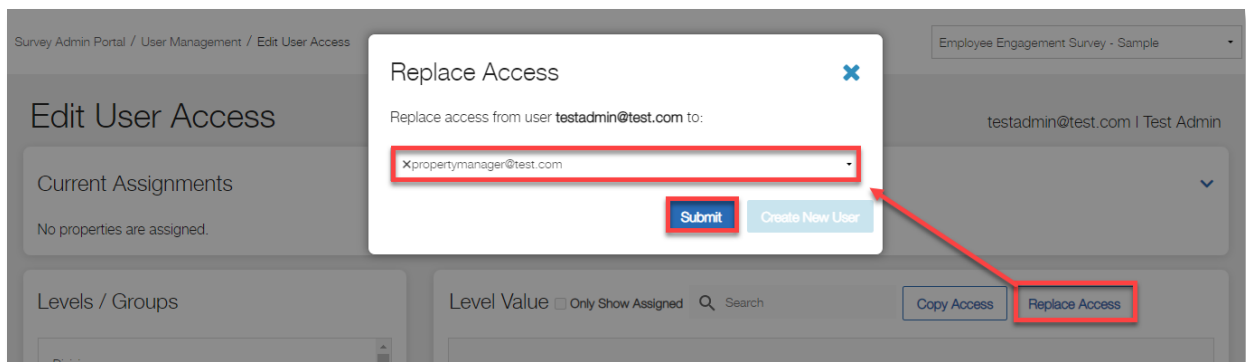
**i** If you accidentally assigned Portfolio access to a user, proceed to the [Assign/Unassign Multiple Users from Levels / Groups](#) section of this guide for instructions to have the user(s) unassigned.

You cannot copy **Survey Admin** access from one user to another as this level of access is required for the Grace Hill Team to grant this top-level tier of access to a user. Please submit a request to your Project Manager or Account Manager to add the **Survey Admin** access to a user account.

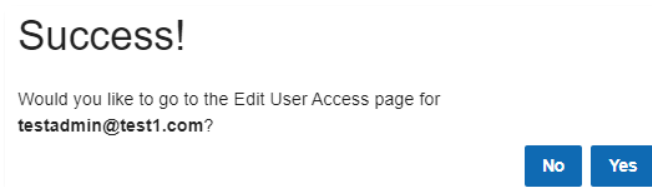
## Replace Access for Users

Follow the below instructions to replace access of one user to another. This can be helpful when a user is replaced by another user. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

21. From the User Management homepage, click [Edit Access](#) for the user to replace the access from.
22. Next, select the **Replace Access** button.
23. The Replace Access pop-up window will appear. In the text field provided, type in the name of the user you'd like to replace the access for. As you type, a listing of users will appear for you to select.
  - o If you need to add a new user, leave the text field blank and click the **Create New User** button. Enter the required fields for First Name, Last Name, Titles (optional) and Email Address, then click **Submit**.
24. Once a user is selected to be replaced, click **Submit**.



25. A pop-up window will appear with a Success! message
  - o Select **No** to return to the Edit User Access page.
  - o Select **Yes** to be navigated to the Edit User Access page for the new user.



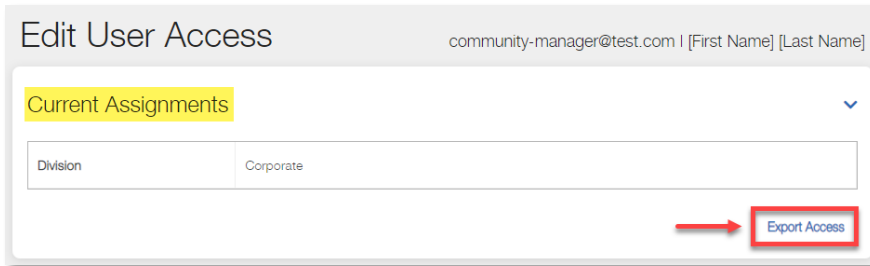
**1** *If you accidentally assigned Portfolio access to a user, proceed to the [Assign/Remove Multiple Users from Levels / Groups](#) section of this guide for instructions to have the user(s) unassigned.*

*You cannot replace **Survey Admin** access from one user to another as this level of access is required for the Grace Hill Team to change this top-level tier of access for a user. Please submit a request to your Project Manager or Account Manager to replace the **Survey Admin** access from one user to another.*

## Export Access Data for a User

Follow the below steps to export access level information for an individual user. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

1. From the **User Management** homepage, click **Edit Access** for the needed user.
2. Next, in the **Current Assignments** section, click the **Export Access** button.



3. An Excel file will then be downloaded to your computer. Click on the file that appears at the bottom of your screen to open. The file will contain a tab for each Level/Group the user has access to, and information on each tab will include the username, program name(s), level(s), and level value(s) assigned for the selected user.

Username	Program Name	Level	Level Value	Properties
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 003
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 006
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 009
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 012
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 015
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 018
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 021
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 024
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 027
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 030
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 033
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 036
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 039
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 042
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 045
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 048
community-manager@test.com	Employee Engagement Survey - Sample Division	Corporate	YYYY	Employee Identifier - 051

## Assign/Unassign Multiple Users from Levels/Groups

To assign or unassign multiple users to a Level or Group, follow the below steps. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

1. From the **User Management** homepage, click the **Level Access** button.
2. You'll be navigated to the **User Level Management** page. From here, you can:
  - o Select the **Export All** button to export a listing of all users. The list will pull up in Excel workbook and a tab will be displayed for Users, and individual tabs will be included for each Level/Group. All tabs will list users associated.
  - o Add a new user by clicking the **Add User** button. Enter the required fields for First Name, Last Name, Title(s) (optional) and Email Address, then click **Submit**.
  - o Search for users in the left column to be assigned to a Level/Group.



## Assign/Unassign Multiple Users from Levels/Groups *(continued)*

- o Click on a user's name to have a separate browser tab open to the Edit User Access page. For more information on editing a user's access, visit the [Assign Level Access to a User](#) section of this guide.
  - o Click the **Export** button in the Levels/Groups section to export a listing of users for the selected level.
3. To assign a user(s), select the checkbox(es) next to the user's information.
  4. Next, from the Levels/Groups section, select the drop-down menu to choose the specific level to assign to the user(s) and click on the appropriate Level Value needed.
    - o Use the Search field located in this section to find the needed level/group.
  5. Then, click the **Assign >>** button to move the user(s) over to the Levels/Groups section.
  6. To unassign a user, select the **X** next to their information under the Level Values section. The user's name will then be removed and added to the listing of Users section on the left.
  7. Lastly, click **Save Changes**.

The screenshot displays the 'User Level Management' interface. At the top, there is a breadcrumb trail: 'Survey Admin Portal / User Management / User Level Management' and a dropdown menu for the survey: 'Employee Engagement Survey - Sample'. The main content is divided into two columns. The left column, titled 'Users', contains a search bar and a list of users. The first user, 'actionplanningdemo@gracehill.com', is selected with a checked checkbox. The right column, titled 'Levels / Groups', contains a 'Portfolio' dropdown menu (highlighted with a red box), a search bar, and a table of 'Level Values'. The 'Portfolio' level is selected, and the table lists several users with 'X' icons for removal. A blue 'Assign >>' button is positioned between the two columns. At the bottom right, there is a red 'Save Changes' button.

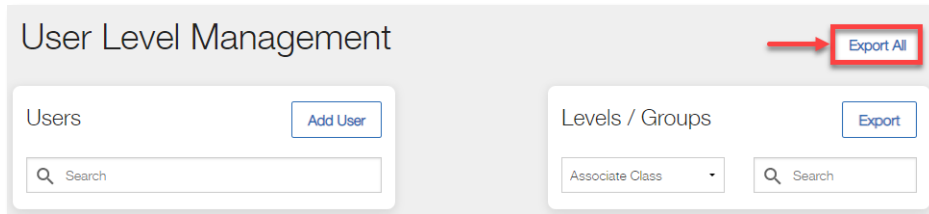
Users	
<input checked="" type="checkbox"/>	actionplanningdemo@gracehill.com
<input type="checkbox"/>	APSubmitter@gracehill.com
<input type="checkbox"/>	community-manager@test.com
<input type="checkbox"/>	glisa915@yahoo.com
<input type="checkbox"/>	industrial@kingsleyassociates.com
<input type="checkbox"/>	kingsett@gracehill.com
<input type="checkbox"/>	kingsleysurveys@demo.com
<input type="checkbox"/>	kingsleysurveys@gracehill.com

Level Values			
Portfolio			
aaldaco@gracehill.com	Ashley	Aldaco	X
ABrown@gracehill.com			X
ACunningham@gracehill.com			X
administrator@kingsleyassociates.com			X
afisher@gracehill.com	Amy	Fisher	X
aforman@gracehill.com			X
aperry@gracehill.com			X

## Export Access Data for all Users

Follow the below steps to export access level information for all users. If you are a Survey Admin for more than one program, ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

1. From the **User Management** homepage, click the **Level Access** button.
2. Next, select the **Export All** button.



3. An Excel file will then be downloaded to your computer. Click on the file that appears at the bottom of your screen to open. The file will contain a tab for Users, and separate tabs for each Level/Group that has been setup in your system which contains information for the level, level value, username, first name, last name, title, and active status for the users assigned.

