KingsleySurveys Admin Portal FAQ

What is the KingsleySurvey Admin Portal?

- The KingsleySurvey Admin Portal is a new feature that will allow a designated client user access to administrative tasks such as User Management and Property Data Management. This is similar to having the Data Manager Role in Vision.

How does a User get access?

- Clients who have Portfolio Level access for a program can request Survey Admin access through their Project Manager/Account Manager.
- Access is initially configured during the onboarding process.
- Requests for access can be accommodated at any time.

User Management

What can a Survey Admin do in User Management?

- Add individual users to the system.
- Update individual user information, including First Name, Last Name, Title, and Email.
- Update individual user access to Levels/Groups.
- Provide copy and replace function for Users.
- Bulk User addition to Levels/Groups.

Can I see what a User has access to?

- Yes, an Excel report can be printed for individual users showing what levels/groups and properties the individual has access to.

Can I make a User inactive?

- Yes, all Users are active by default.

- When a User is removed as active, they will not have the ability to log into the Portal or reset their password.

Will an inactive User still receive emails?

- When a User is removed as active, they will not have the ability to log into the Portal or reset their password.
- Currently, all requests for email notifications and digests to be stopped have to be submitted as a support request through the system.

Can I see all the Users associated with a specific level/group?

- Yes, a Survey Admin can even export an Excel report for an entire portfolio.

Can I add/edit a specific level name (region name, property manager's name) that a User can access?

- No, currently, all requests for new levels/groups and editing of the group name has to be submitted as a support request through the system.

Can a client access Survey Admin if they only have ReputationBuilder?

- Yes, but only for user management at this time. We are currently working on adding functionality to utilize Property Data Management.

Respondent Data Collection

What can a Survey Admin do with Respondent Data Collection?

- Upload an Excel of their respondent data.
- A template and instructions are provided on the page.

Property Data Management

What can a Survey Admin manage in Property Data Management?

- Request the addition of new properties and provide basic property data for up to 10 properties per submission.
- Update property characteristics for existing properties:
    - Property Name
    - Property Code
    - Address
    - Property Classification
    - Renovation Status
    - Market Type
    - Onsite Parking
    - Elevator
    - Square Footage
- Deactivate properties that are no longer a part of your portfolio.
- Assign and update Level/Group information for existing properties.
- View key portfolio metrics based on property status:
    - Number of Active Properties
    - Number of New Properties Pending Review
    - Number of Inactive Properties
    - Number of Rejected Properties Pending Update
- Export portfolio property list.

Will I receive any notification when I submit a new property/properties?

- Yes, the Survey Admin who submitted the property will receive an email notification with a listing of the property/properties.
- A Survey Admin can also see properties pending review on the Property Data Management homepage.

Will I receive a notification when my properties have been processed?

- Yes, the Survey Admin who submitted the property will receive an email notification that their properties have been processed including any additional information if any have been rejected.

Property Data Management features **NOT** available:

- Cannot update fixed property characteristics for existing properties:
  - Country
  - State (if applicable)
  - City
  - Postal Code (if applicable)
  - Property Type
- Cannot reactivate previously properties in their portfolio.
- Cannot create, update, or remove groups/levels.
- Cannot create, update, or remove group/level values.