

KingsleySurveys

Respondent Data Collection

From the Admin Portal, those with access will be able to upload tenant/resident information for each property within your survey program(s). This information and functionality are for our Annual (Commercial/Multifamily) customers.

To access **Respondent Data Collection**, you must be set up with permissions as a Survey Admin. Please submit a request to your Project Manager for them to add the **Survey Admin** access to your account.




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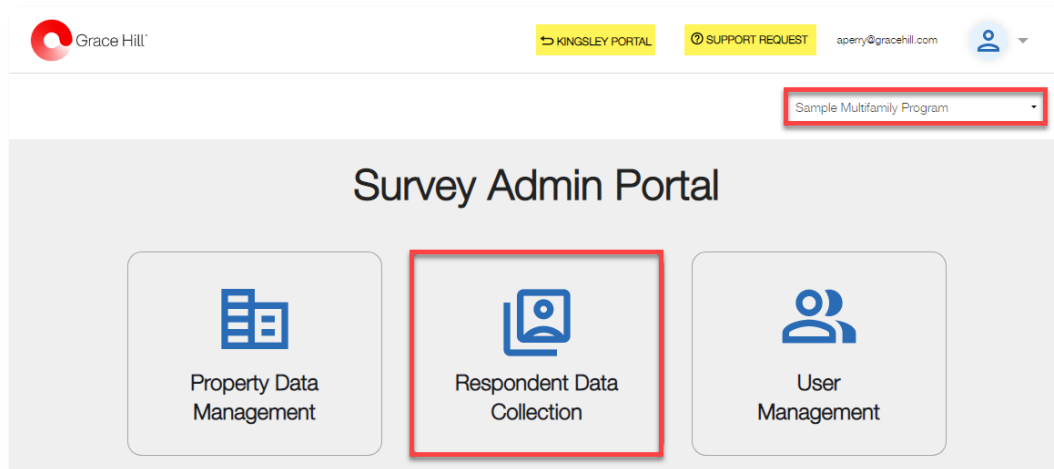
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Accessing the Survey Admin Portal

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 8:00am – 7:00pm 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 Survey Admin users will have access to the **Respondent Data Collection** tile where you can download a template to enter respondent data for the properties in your survey program.



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Download Respondent Data Template

The first step to provide new respondent data is to download the template file provided on the Respondent Data Collection homepage. Follow the below instructions to download the template, to then populate the information needed for each property.

3. From the **Survey Admin Portal**, click the **Respondent Data Collection** tile.
4. The **Respondent Data Collection** homepage will appear.
5. Click the **Download Template** button for the *KingsleySurveys Tenant/Resident Collection Template* Excel (.xlsx) file to be downloaded to your computer.
 - o Once downloaded, the file will appear at the bottom of your computer screen. Click on the file to open.

The screenshot shows the 'Respondent Data Collection' page. At the top, there's a breadcrumb trail: 'Survey Admin Portal / Respondent Data Collection'. The main content area is divided into three steps:

- 1. Start with a template**: Includes a 'Download Template' button. A red arrow points to this button.
- 2. Select a project**: Includes a 'Project:' dropdown menu.
- 3. Upload a file**: Includes an 'Upload File...' button.

Below the steps is an 'Upload History' section with a search bar and a table with the following columns: Date Processed, User Name, Project, File Name, Status, and Action.

6. The first tab of the file contains **Instructions** and guidelines for using the template in order to fill in information into the *Tenant – Resident Data* tab.
 - o Each participating tenant/resident should correspond to a single row.
 - o Property names need to match exactly with the property names in the KingsleySurveys Portal.
 - o For assistance, reach out to your Project Manager or Account Manager, or call 866-472-2344.

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Download Respondent Data Template (continued)

KingsleySurveys Tenant / Resident Data Instruction Sheet
Please use this template to indicate the tenants / resident participating in your survey program.

Tenant / Resident Data

- Each participating tenant / resident should correspond to a single row.
 - For each tenant / resident, please list the single most appropriate contact (typically the lease decision maker / holder).
 - Tenants / residents with multiple leases at a single property should appear only once, with combined square footage.
- Property names need to match exactly with the property names in the Portal.
- A Sample of what your tenant / resident data should look like is provided below

IMPORTANT GUIDELINES

- Follow the headers and do not alter the column order or delete columns.
- Do not merge cells, rows, or columns.
- Fields in **RED** are **required**.
- Column headers in **ORANGE** are **required**, but are property type specific.

For assistance, please email your project manager or your account manager or call 866-472-2344.

Sample Tenant / Resident Data

Property Name <small>(As it appears on the Portal)</small>	Tenant / Resident Full Name	Email Address	Tenant / Resident ID <small>(use for any internal Tenant / Resident IDs)</small>	Tenant Company Name <small>(Commercial Tenants only)</small>	Resident Unit # <small>(Multifamily Residents Only)</small>	Lease Expiration Date <small>(MM/DD/YYYY)</small>	Tenant Square Footage <small>(Commercial Tenants only)</small>
Office Property A	Bob Cornie	cornie@warehouse.com	1293485	Warehouse Inc.		6/24/2023	25000
Office Property A	Daren Shaw	shaw@printing.com	1933746	Printing Ltd.		6/20/2023	12000
Office Property A	Jim Smith	smith@smith.com	2833745	Smith & Assoc.		9/8/2023	45000
Community B	Debbie Ulbrich	d.ulbrich@email.com	3392834		1323		
Community B	Steve Urquien	stevesmith@email.com	5736283		1324		
Industrial Property C	Ann Jones	ann@dyn.com	2049586	Dynamics		5/31/2023	25000
Retail Property D	Jim James	james@jewels.com	2272163	Jewels 4 You		11/4/2022	2500
Office Property E	Danni Walker	danni@dannis.com	1342845	Danni's DVD's		8/4/2024	2000

- After reviewing the Instructions tab, select the **Tenant-Resident Data** tab to start filling in information needed for each property.
 - Click the **Enable Editing** button at the top to edit the template file.
 - Column headers in red and orange are required fields. Do not make changes to columns or merge fields.
 - Ensure all data in the template is accurate and valid as this could affect the upload functionality. (Ex. *email@gmail.com* versus *email@gmail@.com*)
- Once all tenant/resident data has been entered onto the *Tenant-Resident Data* tab, save the spreadsheet to your documents. Then, proceed to the next step to [Upload Respondent Data](#) below.
- To return to the admin portal homepage, in the breadcrumb trail at the top-left corner, click the **Survey Admin Portal** link.

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Upload Respondent Data

After all tenant/resident data is added to the downloaded spreadsheet and saved to your computer, complete the below steps to upload your saved file into the Admin Portal > Resident Data Collection page. Ensure the appropriate program is selected in the drop-down menu provided at the top of the screen before proceeding.

10. From the **Respondent Data Collection** homepage, in the **2. Select a project** section, click the **Project** drop-down menu to choose the needed project for the respondent data to be added to.
11. Next, in the **3. Upload a file** section, click the **Upload File** button.

The screenshot displays the 'Respondent Data Collection' page. At the top right, a dropdown menu is set to 'Employee Engagement Survey - Sample'. The main content area is titled 'Respondent Data Collection' and contains three numbered steps:

- 1. Start with a template**: Includes instructions to download a template and enter tenant/resident information. A 'Download Template' button is visible.
- 2. Select a project**: Includes instructions to select a project from a dropdown menu. A 'Project:' dropdown menu is shown.
- 3. Upload a file**: Includes instructions to use the 'Upload File' button to select a completed respondent file. A red box highlights the 'Upload File...' button, with a red arrow pointing to it.

Below the steps is the 'Upload History' section, which features a search bar and a table with the following columns: Date Processed, User Name, Project, File Name, Status, and Action.

12. Once you have uploaded the file, a pop-up message will appear stating, *“The file is being uploaded to the server. Once the file is processed the status will be updated in the Upload History table.”*
13. After the upload has completed, in the **Upload History** section, you’ll see a new line item to include the date, user name of the person who uploaded the file, the project selected for the upload, file name of the uploaded file, status of the upload, and any actions associated with the file.
 - o If there are no errors triggered by the upload, the **Status** will reflect as **File Processed** and in the **Action** column.
 - o If there are errors associated with the uploaded information, the **Status** will reflect as **Error**, and under the **Action** column there will a link to **View Errors**, which when clicked will export an Excel file with the reason for the error in the first column, ErrorText.

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Upload Respondent Data *(continued)*

Property	Tenant	Reside	Email	Tenant	Tenant	Lease
[Industrial 555459	Amuis Ma 221	amaximus@GH, Inc.	1000	12/1/2022 12:00:00 AM		
[Medical (578889	Maximus (222	mcole@te Grace Hill,	800	12/15/2022 12:00:00 AM		
[Multifam 608879	Cole Smitl 107	csmith@te GH, Inc.	600	1/20/2023 12:00:00 AM		
[Office Pr 700889	Robert Sr 29	rsmith@te Funhouse	1500	2/1/2023 12:00:00 AM		
[Retail Pr 885579	Ron Dean 30	rdean@te Funhouse	2000	3/1/2023 12:00:00 AM		

- Then, revise the information causing errors on the original file and update the needed information appropriately, and save the file after making all changes.
 - Lastly, go back to the Respondent Data Collection homepage to reupload your revised file.
14. Once the file is processed, the respondent data should be available to view in the Respondents tab of the Kingsley Portal.