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.

Table of Contents

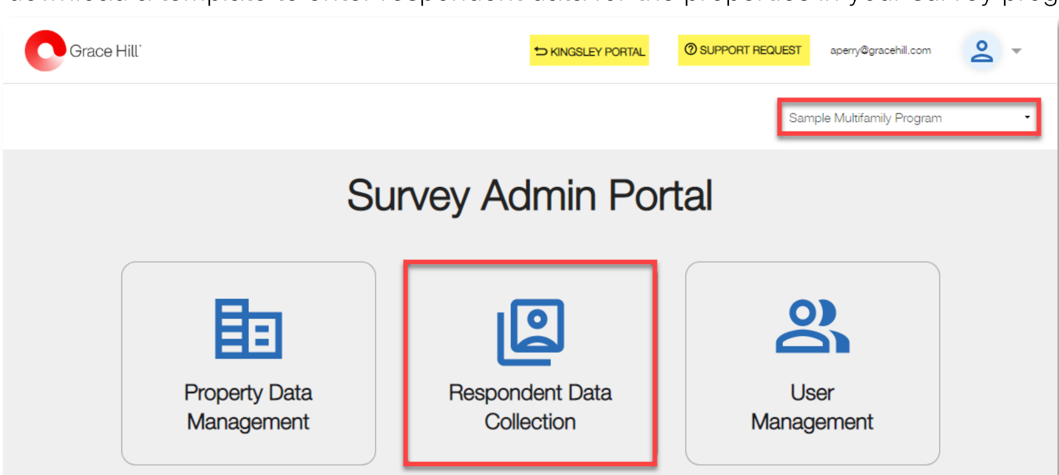
Click on a topic below to be navigated directly to the section of the guide.

Accessing the Survey Admin Portal 1
Download Respondent Data Template 2
Upload Respondent Data 4

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.
   - Click the ⮌ **Kingsley Portal** link to return to the KingsleySurveys Dashboard.
   - 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.
   - 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.
   - 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.
   - 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.

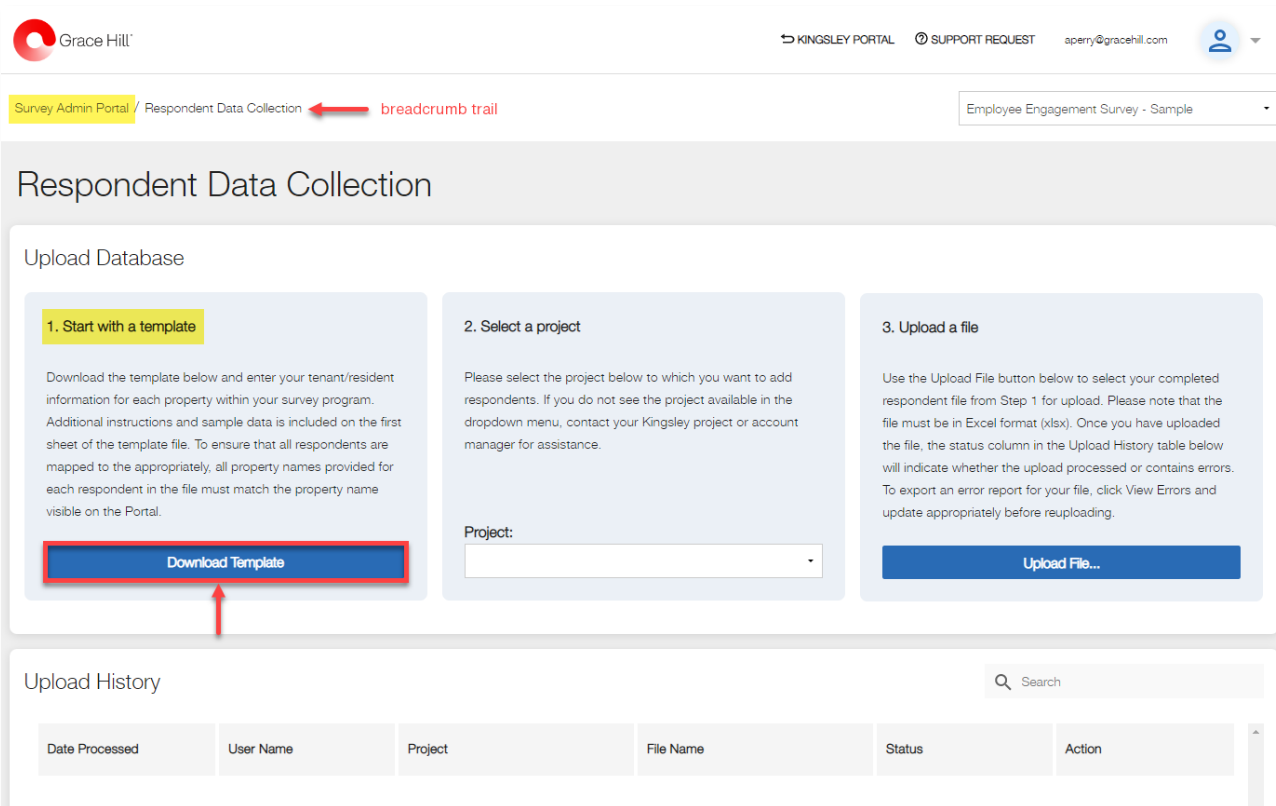


KingsleySurveys

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.

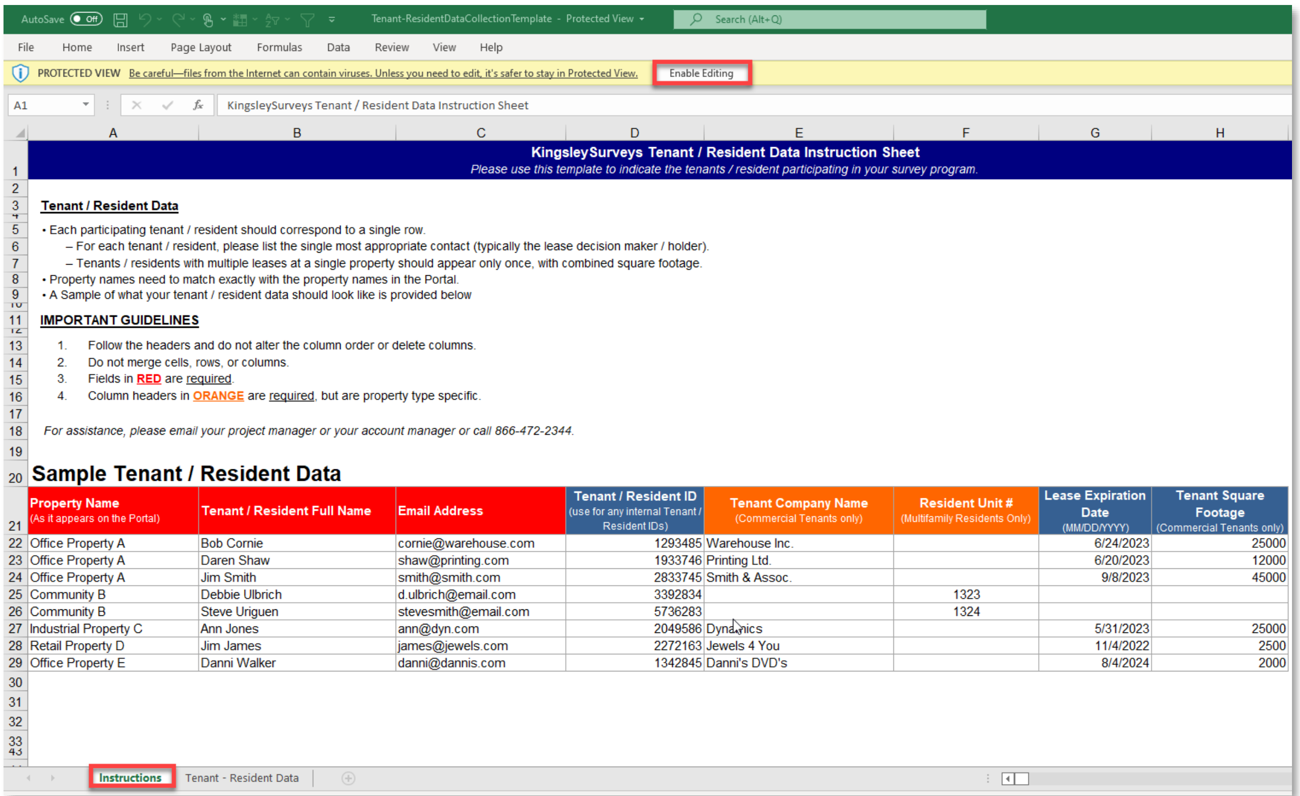
3. From the **Survey Admin Portal**, click the **Respondent Data Collection** tile.
4. The **Respondent Data Collection** homepage will appear.
5. Click the **Download Template** button for the *KingsleySurveys Tenant/Resident Collection Template* Excel (.xlsx) file to be downloaded to your computer.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



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.
    - Each participating tenant/resident should correspond to a single row.
    - Property names need to match exactly with the property names in the KingsleySurveys Portal.
    - For assistance, reach out to your Project Manager or Account Manager, or call 866-472-2344.

KingsleySurveys

Download Respondent Data Template *(continued)*



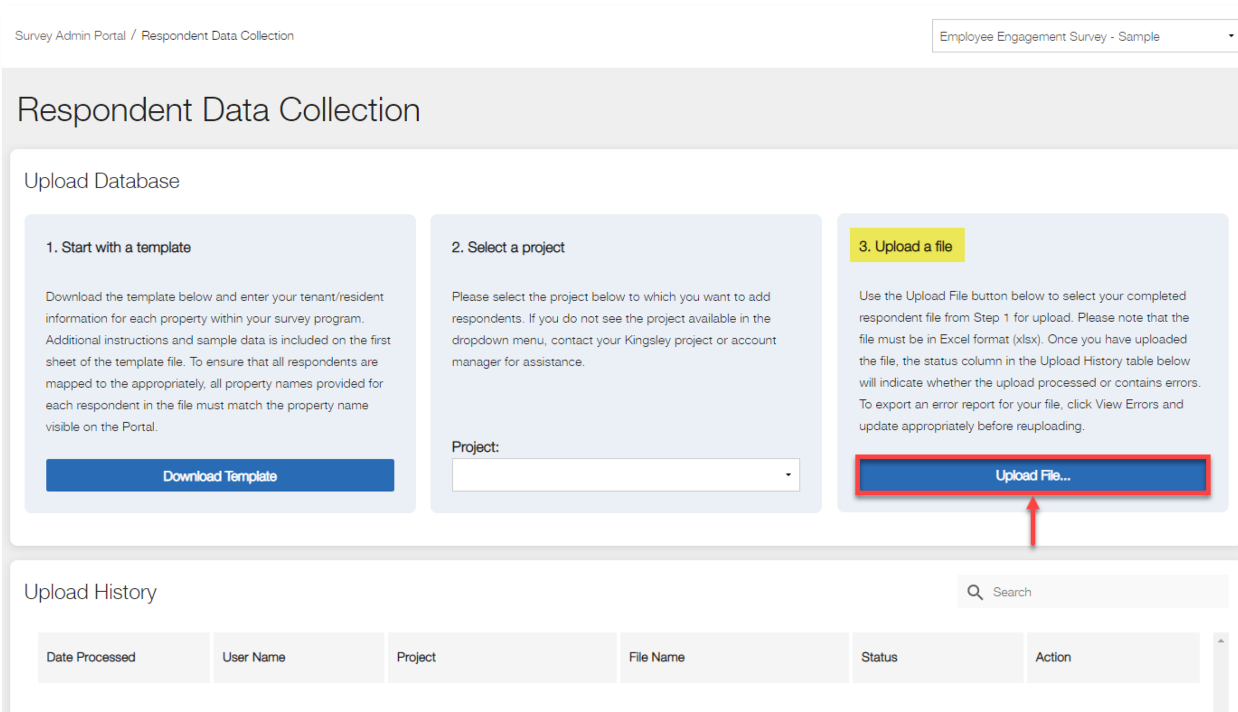
7. After reviewing the Instructions tab, select the **Tenant-Resident Data** tab to start filling in information needed for each property.
   - Click the **Enable Editing** button at the top to edit the template file.
   - Column headers in red and orange are required fields. Do not make changes to columns 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)*
8. 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.
9. To return to the admin portal homepage, in the breadcrumb trail at the top-left corner, click the **Survey Admin Portal** link.

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.



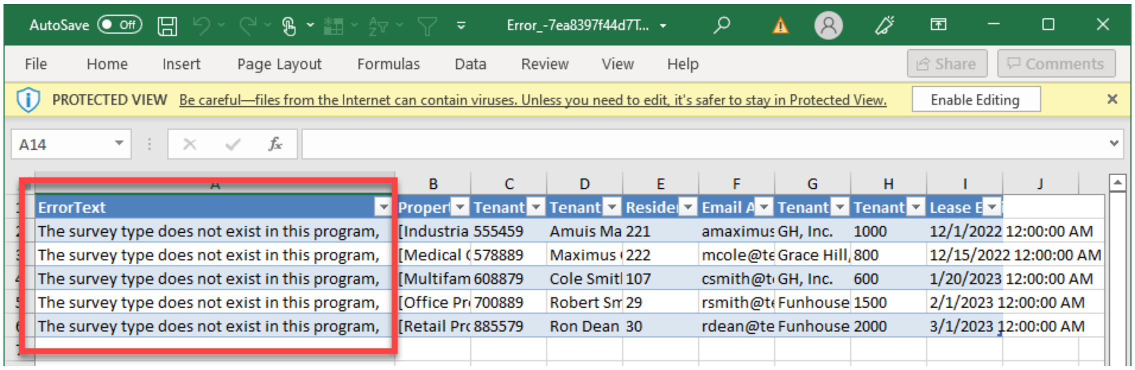
12. Once you have uploaded the file, a pop-up message will appear stating, *"The file is being uploaded to the server. Once the file is processed the status will be updated in the Upload History table."*.

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.

    - If there are no errors triggered by the upload, the **Status** will reflect as **File Processed** and in the Action column.
    - 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.

KingsleySurveys

Upload Respondent Data *(continued)*



- 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.