

User Data Instructions

In Stepwell, we use templated spreadsheets to load your data each year. These templates will allow you to add each year's student list for review. Here are a few notes on the User Data template.

- The column order of your data must match the template. If it does not, this can lead to details for each location being in the wrong place.
 - This includes hidden columns. Hidden columns are still counted in the order of columns so our recommendation is to refrain from hiding columns.
 - The Column Headers need to remain exactly as they are in the Template. Please do not edit them.
- Each row should be a unique record for a User in Stepwell.
- This document contains information about the Template, the Assigned Roles used in Stepwell

Below are the requirements for each column:

Column Position	Column	Description	Required?	Conditional Requirements
A	Username*	This is your Username for your account. This username is what you use to log into Stepwell.	Yes	
B	Name*	Your First name.	Yes	
C	Surname*	Your Last Name/Surname	Yes	
D	EmailAddress*	This should be the official email address used.	Yes	
E	PhoneNumber	Phone number	No	
F	Password*	This is your password for the site.	Yes	

G	AssignedRoleNames	This is the Stepwell assigned role. It is how access is given within Stepwell and is assigned to your username.	No	
---	-------------------	---	----	--

Assigned Role Names within Stepwell

For District, there are currently three assigned roll names:

- **SW Admin** is limited to 1 per tenant and is for administering the Stepwell users. SW Admin is not assigned work to do within Stepwell. Can create Activities in Activity Setup.
- **Stepwell Program Manager** - Can create Activities in Activity Setup.
- **SW Coordinator** can be assigned activities, but cannot access activity setup.
- **SW User** like the *SW Coordinator* can be assigned activities, but cannot access activity setup. Whereas the *SW Coordinator* is usually the main contact for the location, *SW User* is typically used for other members of their team.

Create User Model as accessed by the SW Admin:

CREATE NEW USER ×

1
 USER INFORMATION

2
 ROLES 1

3
 ORGANIZATION UNITS

STEP-Coordinator
 STEP-ProgramManager

STEP-User

4
Cancel
Save