

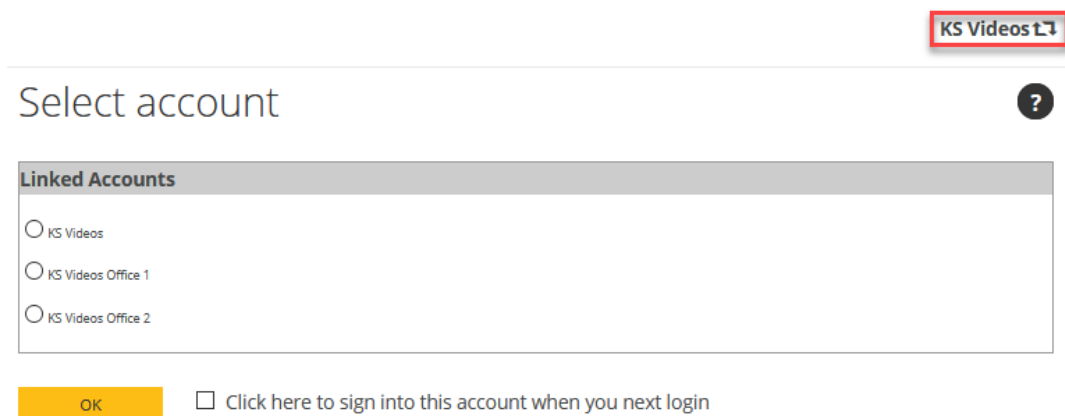
UNDERSTANDING ADMIN ROLES

- Administrator – access to all the features and data in the account
- Sub-Administrator – ability to set up a test session from a browser; they have no admin dashboard access or privileges

Understanding account structure

It is possible to create a hierarchy of linked accounts.

(Refer to the help sheet called **Linked Accounts** for more information about creating a KS account hierarchy and navigating between linked accounts).



KS Videos ↕

Select account

Linked Accounts

KS Videos

KS Videos Office 1

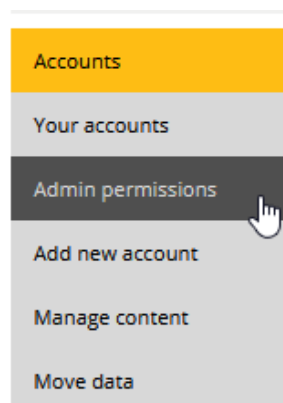
KS Videos Office 2

Click here to sign into this account when you next login

Administrator permissions (Accounts > Admin permissions)

Under this sub-menu you will see the list of administrators for the active account.

To edit the highest level of permissions for each administrator, the magnifying glass icon is selected.



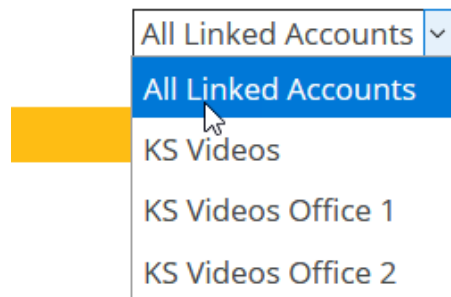
When should the global or highest-level administrator or team of administrators be consulted?

If you consider making a change to your:

- UI settings
- Feedback settings
- Account hierarchy i.e. adding a further linked account under your main account
- If you want to edit a published assessment created in a different account
- If you want to assign any content to a linked account
- If you want to move data to a different account
- If you want to delete any data from your account
- If you want to change the admin type of an existing administrator
- Admin Permissions – since this could affect other linked accounts – see below

Best practice guidance regarding administrators

- Take note of the LINKED ACCOUNTS drop down present underneath LIBRARY, RESULTS, USERS. Make your selection before interacting on these pages i.e. select all linked accounts or work on a specific LINKED ACCOUNT.
- Always make certain you are working in the correct account before performing your desired action.
- Note: The administrators of the parent account will automatically become administrators of any linked accounts as well.



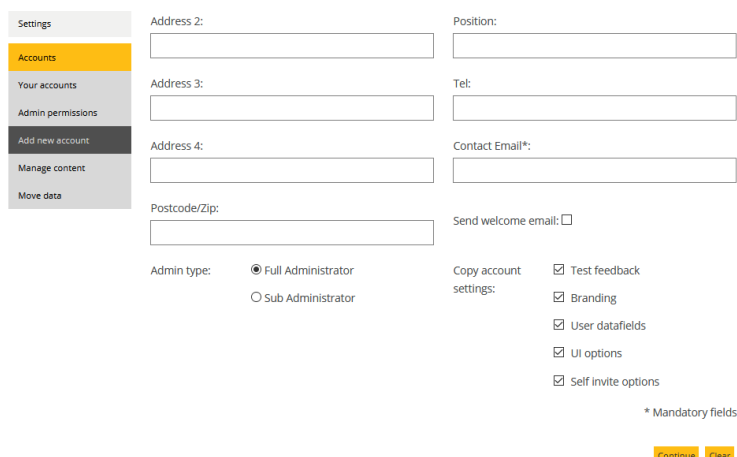
What can be shared/moved/replicated between KnowledgeSmart linked accounts?

- Assessment Feedback Settings
- Assessment Invite Templates
- User datafields
- Assessment/Survey Content – it is always advisable to let the extended team know when you create a custom assessment or survey, as it might be useful for other teams to use.
- User data (including invites, results and any user information)

Creating a new account

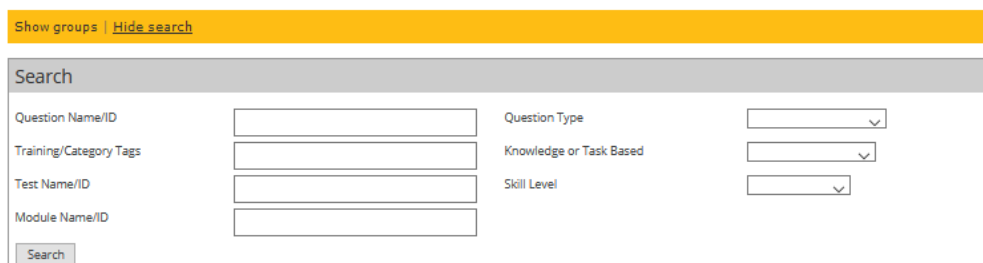
Before creating a new account consider carefully the purpose of creating this new account and inform other administrators of your plans.

Utilise the 'Copy account settings' area under the 'Add new account' sub-menu to easily transfer existing account settings across to new accounts. This really helps with consistency.



Assessment content customization

- Before engaging in assessment customization check in with the global administrators to make sure that there isn't existing account specific content that can be re-purposed. This will help save time.
- Before importing an assessment to your account for customization check in the drafts area if there isn't already a copy imported. Avoid importing a KnowledgeSmart off-the-shelf assessment to your drafts area more than once. Re-importing it many times creates a large library of duplicate questions with little extra value.
- Utilise the 'Links to Learning' feature to link relevant questions to internal company training material. The user will receive a link to this material in their skills assessment report if they register a skills gap. More info can be found [here](#).
- If you are going to make a change to anything it is best practice to duplicate it and give it a unique name.
- Use category tags under modules and questions to isolate specific relevant content and then create a static group to group the content for your initiative. You will achieve the most granular search under draft questions.



(Refer to the help sheet called **Creating Custom Library Content** for more information about creating a KS account hierarchy and navigating between linked accounts).

The importance of using category tags

- You will notice the ability to add category tags at assessment, module or question level.
- When you make an edit to an assessment, module or question it is best practice to add a comment under category tags e.g. Lisa Taylor edited 17102020 or customized for Civil Pilot 2020. This will help in keeping the library easy to navigate and other administrators will be able to isolate this content easily later on. This method can also be used effectively when reviewing assessment content for suitability.
- The same applies when you create bespoke content from scratch (assessment, survey, module or question). Please do not skip the tagging step. This is critical to successful implementation and will have an effect on how training is targeted with the Pinnacle Series integration (from Eagle Point software).

How does reporting work?

- KnowledgeSmart data can be exported at parent or sub-account level. Always make your selection from the appropriate drop-down menu.
- A consolidated data export is available from the bottom of the main admin dashboard screen. Make sure you take the export at the appropriate account level i.e. for a specific linked account or at parent account level. Immediately save the data export with a date. This will become your data source for the KnowledgeSmart Power BI template.

DATA EXPORT

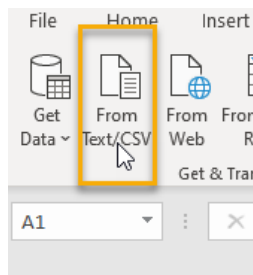
Accounts:

- The Power BI template is available at two levels (Getting Started and Advanced) based on your experience in using Power BI. To download the template, select the blue button as shown above.
- Template customizations are possible based on individual project scope.
- If you have extensive grouping or filter requirements (i.e. beyond the 5 user data fields) these can easily be created inside the Power BI Template.
- There are some in-platform data visualisations from and more granular data exports underneath the RESULTS menu.

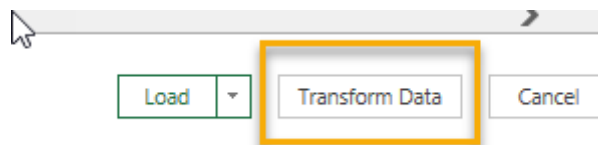
Working with the KnowledgeSmart survey data export

- The survey data export is in .CSV format currently.
- If you open this file in Microsoft Excel directly the data might not display as expected.
- It is best practice to import the .CSV file as per the steps below. Once the import has been completed the data will be in the correct Microsoft Excel format ready to become a data source inside Microsoft Power BI or other business intelligence software applications.

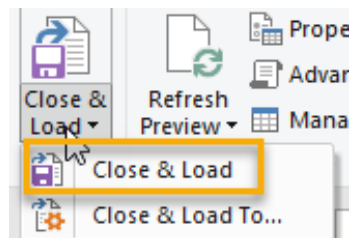
- Step 1: Open Microsoft Excel and go to the data menu.



- Step 2: Select from Text/CSV.
- Step 3: Browse to the CSV file that you exported from the KS survey platform and click import.
- Step 4: Click Transform Data.



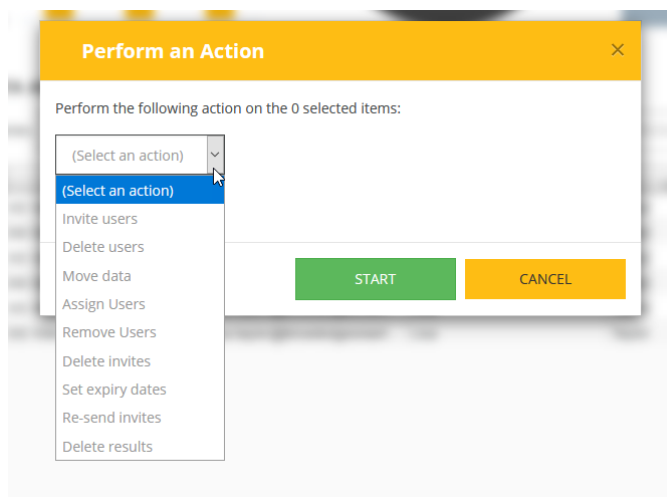
- Step 5: Select Close & Load.



- Step 6: Save the transformed data.






The KnowledgeSmart data analysis tool (Admin Home menu)

- View and customize data queries based on all linked accounts or for a specific linked account
- Take a copy of one of the pre-defined data queries and personalise as needed. Remember to give it a unique name.
- Use the data analysis tool to perform other bulk actions as per below image.



- Take careful note to select the applicable account level (parent level or specific linked account) before selecting perform action.

DATA ANALYSIS

Queries:     Accounts: 

<input type="checkbox"/>	Account Name	Email	First Name	Last Name	User St
<input type="checkbox"/>	KS Videos	lisa.taylor@knowledgesmart...	Lisa	Taylor	Employee
<input type="checkbox"/>	KS Videos	lisa.taylor@knowledgesmart...	Lisa	Taylor	Employee
<input type="checkbox"/>	KS Videos	lisa.taylor@knowledgesmart...	Lisa	Taylor	Employee
<input type="checkbox"/>	KS Videos	lisa.taylor@knowledgesmart...	Lisa	Taylor	Employee
<input type="checkbox"/>	KS Videos	lisa.taylor@knowledgesmart...	Lisa	Taylor	Employee
<input type="checkbox"/>	KS Videos	lisa.taylor@knowledgesmart...	Lisa	Taylor	Employee

Selected Accounts: All Linked Accounts Records: 6

User datafields

- In order for there to be maximum business value regarding how KnowledgeSmart users, invites and results it is best practice to use consistent user datafields across parent and linked accounts.
- Certain user datafields could utilise data that you might have already have i.e. cost center number or employee code. In this case the user would not interact with this data but you can use it to help us filter and group your data. It is critical that administrators do not skip this step and import user data without this column populated. Careful thought has gone into the definition of user datafields and management reporting requirements.
- In another case i.e. number of years work experience, you might want the user to make a selection from a defined drop-down list and the user will be prompted to make this selection at the beginning of the assessment. This is therefore not data that you import as part of the user data import but rather data that is captured during the assessment process.

- Having consistent user datafields means consistent dynamic groups can be set up.
- Dynamic groups are useful to help us segment and filter consistently across users, invites and results.
- There is no limitation on the number of dynamic groups or static groups under each account. It is always a good idea to discuss group names and segments with other administrators.
- A static group is essentially a group that is manually collated whereas a dynamic group populates dynamically based on the parameters/rules defined in the creation of the group. It is sometimes useful to use a dynamic group to apply a specific filter and then create your static group from there.
- As a minimum the agreed user data fields should be utilised to create dynamic groups across all linked accounts.
- If you have unique requirements of how grouping your data static grouping might be a be option to explore. Please reach out to the KnowledgeSmart team for assistance.

*** Need to capture additional data from your users or incorporate more than 5 user data fields in your data analysis? You can use the KnowledgeSmart survey tool to capture additional information and then analyse this/use them as additional filters inside the KnowledgeSmart Power BI template with your other KS data.*

Importing user data

- This is critical to successful implementation of this tool.
- KnowledgeSmart provides a template which shows you in what format the data needs to be in, in order for it to be imported correctly.
- You can import user data from the 'Manage user data' sub-menu or during the invite process. Both workflows will require the data to be in the correct format as per the template provided.
- If you add an individual user, please do not skip adding the defined user datafields or profile type as it is important to keep data consistent and complete.
- Check under your Settings > User datafields for the user datafields defined and make sure to include the ones where user input is not required during your data import.
- Where legacy data exists for previously defined user datafields a decision needs to be reached whether this data needs to be retained for any reason or whether the data can be cleaned and aligned accordingly.
- It is easy to clean the data as KnowledgeSmart allows you to export your user data at any time, make the appropriate changes and re-import the data. Existing results data will not be affected by re-importing user data.
- Before you clean any data discuss this with the other administrators on your account and always save a copy of the data before you edit it in case there is a need to retain historical data.
- It is possible to edit a username or user details under the Users menu and selected the magnifying glass icon next to the appropriate user.

System emails

Administrators can define which system emails they want to be copied on. This is done under Settings > System mail.

Invites:	Invites mail: <input type="checkbox"/> Re-sent invites mail: <input type="checkbox"/>
Reminders:	Copy admin in on reminder mail: <input type="checkbox"/> Alert admin on completion mail: <input type="checkbox"/> Alert admin if expiry date passes without completion: <input type="checkbox"/>
Results:	Results mail: <input type="checkbox"/> Re-sent results (tests and exams) mail: <input type="checkbox"/> Send email when 'No report' option is set: <input type="checkbox"/>
Administrators:	New administrator notification mail: <input type="checkbox"/>
Admin Summary Mail:	Admin summary mail: <input type="checkbox"/>

If you have the need to share information with a colleague that is not a KnowledgeSmart admin then this can also be done from underneath the System Emails menu.

Mail:

Add email recipient


Last name: First name: Email:

Invites:	Invites mail: <input type="checkbox"/> Re-sent invites mail: <input type="checkbox"/>
Reminders:	Copy admin in on reminder mail: <input type="checkbox"/> Alert admin on completion mail: <input type="checkbox"/> Alert admin if expiry date passes without completion mail: <input type="checkbox"/>
Results:	Results mail: <input type="checkbox"/> Re-sent results (tests and exams) mail: <input type="checkbox"/> Send email when 'No report' option is set: <input type="checkbox"/>
Administrators:	New administrator notification mail: <input type="checkbox"/>
Admin Summary Mail:	Admin summary mail: <input type="checkbox"/>

Passwords

When an administrator is added for the first time the KnowledgeSmart system will send them a welcome email with a system issued password.

It is best practice to update to a password of your own and this can be done under Settings > Passwords.



Test Survey Skills

Change your password

Current password:

New password:

Confirm new password:

- Home
- Library
- Invites
- Results
- Users
- Settings**
- Test Invite
- Reminders
- Feedback
- Branding
- User datafields
- UI options
- Resources
- System mail
- Passwords