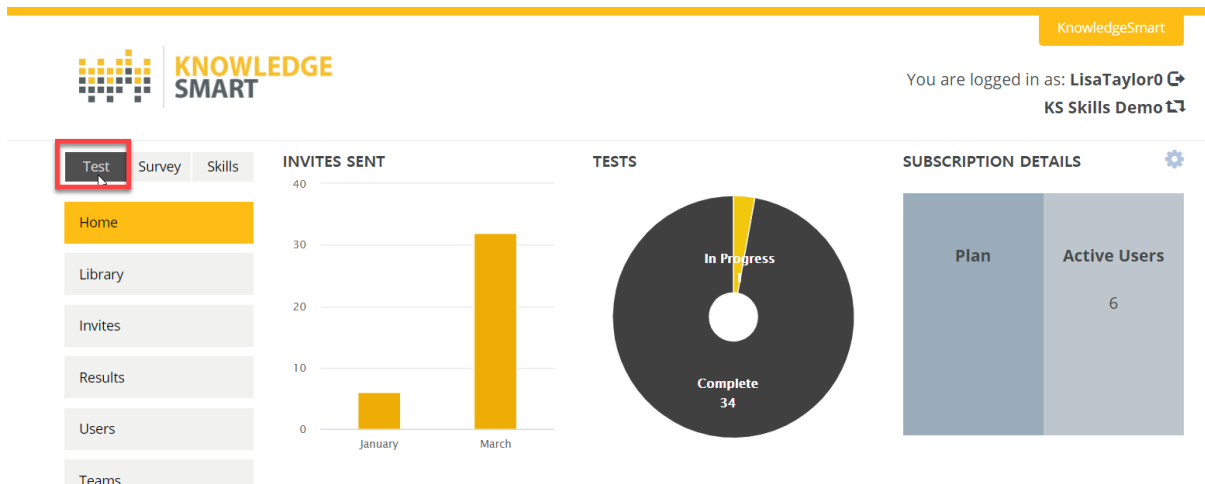


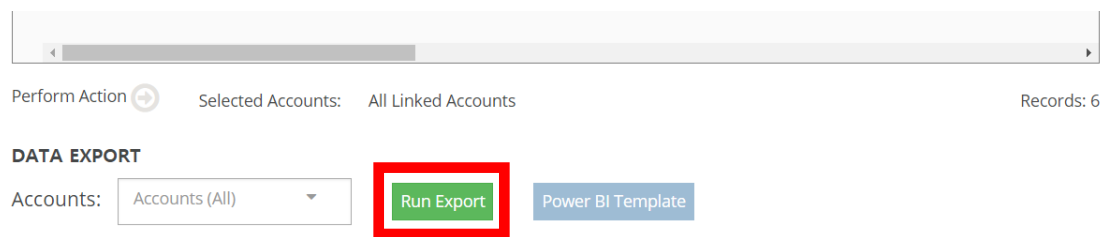
POWER BI REPORT - EXPORTING & UPDATING SKILLS ASSESSMENT RESULTS

1. Exporting the Power BI export file.

1.1. Log into your KnowledgeSmart Administrator dashboard. Click on the 'Skills' button to enter Skills Audit mode.



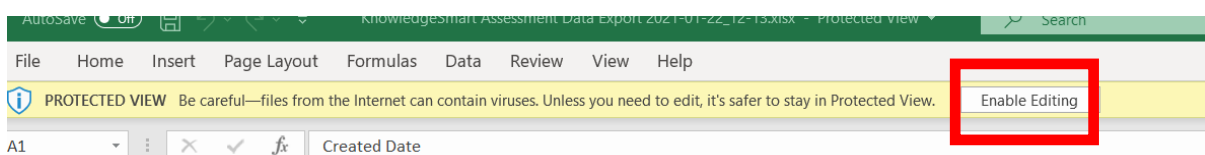
1.2. At the bottom of the page click on the green 'Run Export' button to export your Skills Audit data to Excel.



The screenshot shows the 'DATA EXPORT' section of the dashboard. It includes a 'Perform Action' button, a 'Selected Accounts' dropdown menu (set to 'All Linked Accounts'), and a 'Records: 6' indicator. Below this, there is a 'DATA EXPORT' section with an 'Accounts' dropdown menu (set to 'Accounts (All)') and a green 'Run Export' button (highlighted with a red box). A 'Power BI Template' button is also visible.

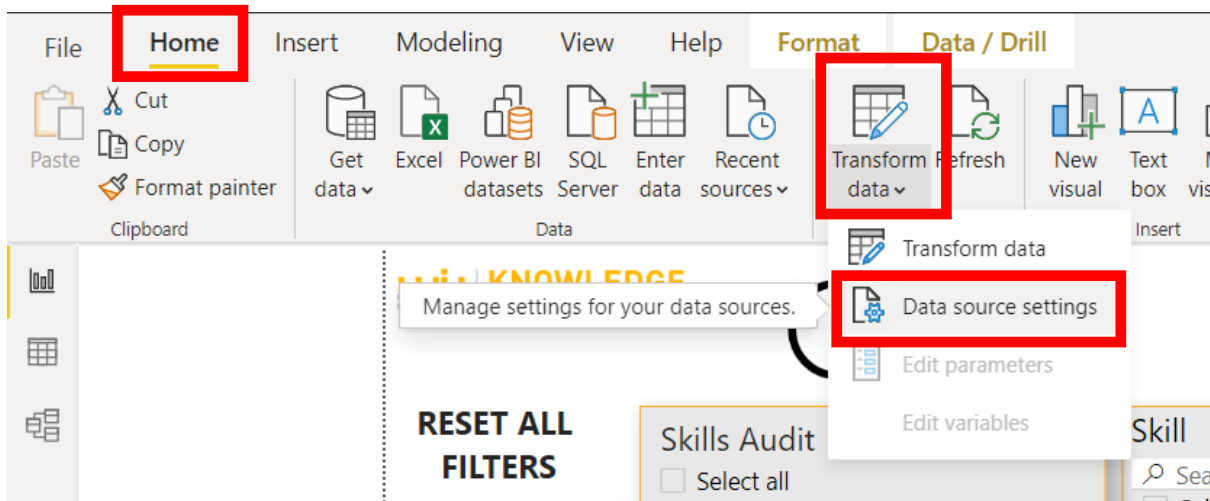
1.3 Open the downloaded file, which will have a name something like this, KnowledgeSmart Assessment Data Export 2021-01-22_12-13.xlsx.

The file will open in 'PROTECTED VIEW' Mode. Click on the 'Enable Editing' button which will remove the editing protection. Save the file in whichever location you wish. Remember where it is as you will need to upload it to the Power BI report. You may change the name of the saved file.



2. Loading your exported Skills Assessment data to the Power BI report.

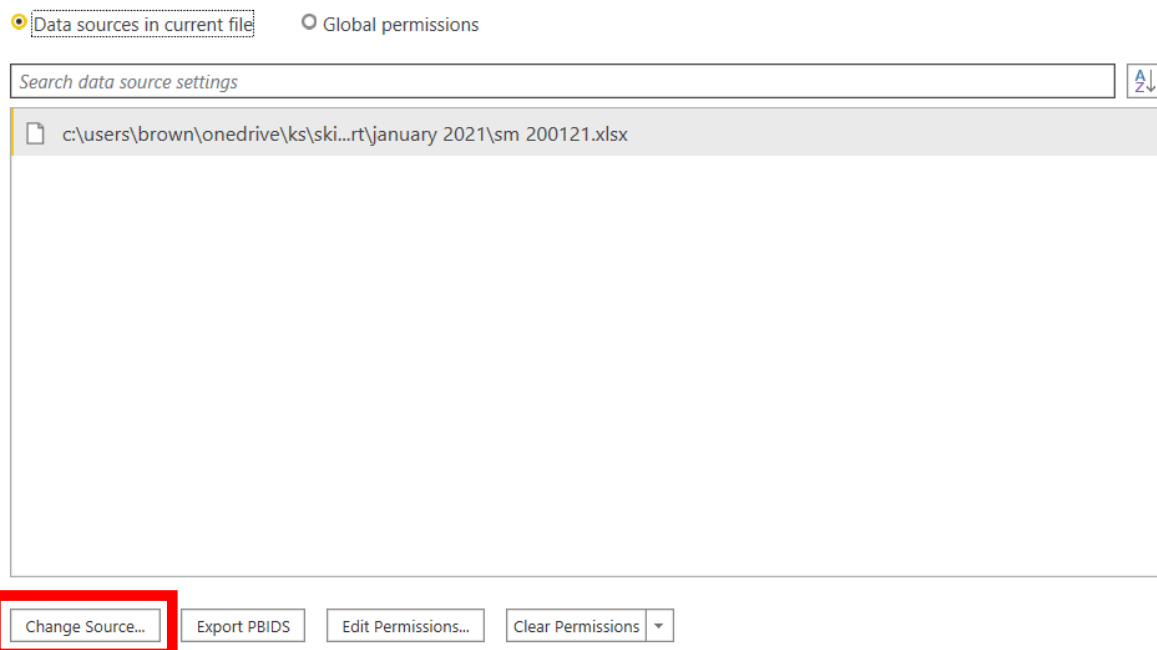
2.1. From any page within the Power BI report choose the 'Home' menu. Select 'Transform Data' then 'Data source settings'.



2.2 This opens the 'Data source settings' dialogue box. Select the 'Change source' button.

Data source settings

Manage settings for data sources that you have connected to using Power BI Desktop.



Close

2.3 Browse to the location of your Power BI export file.

Excel

☒ Basic
 ☐ Advanced

File path
 C:\Users\brown\OneDrive\KS\Skills Matrix\Power BI export\January 2021\

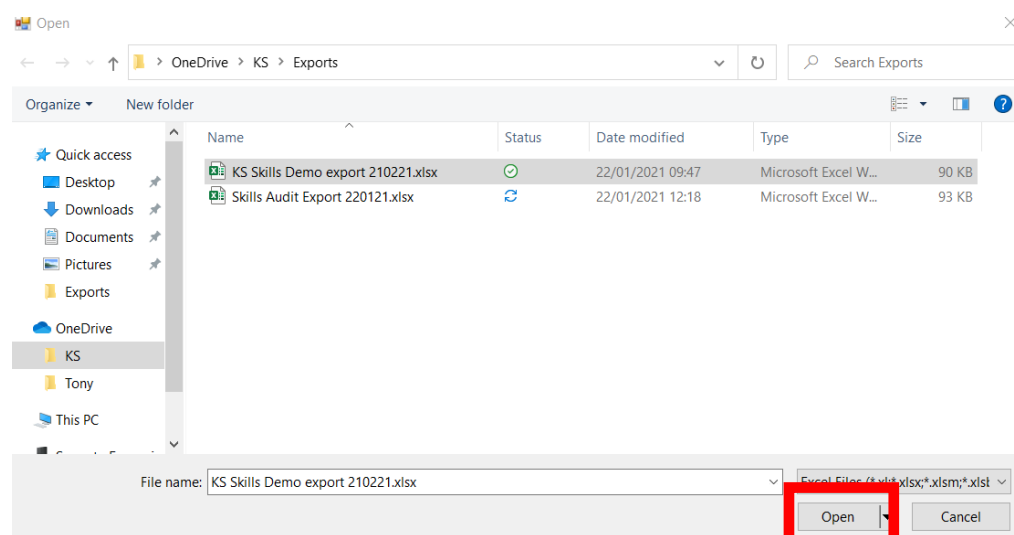
Browse...

Open file as
 Excel Workbook

OK

Cancel

2.4. Select the file then click on 'Open'.



2.5 The loaded file will now appear here. Click on 'OK'.

Excel

☒ Basic
 ☐ Advanced

File path
 C:\Users\brown\OneDrive\KS\Exports\KS Skills Demo export 210221.xlsx

Browse...

Open file as
 Excel Workbook

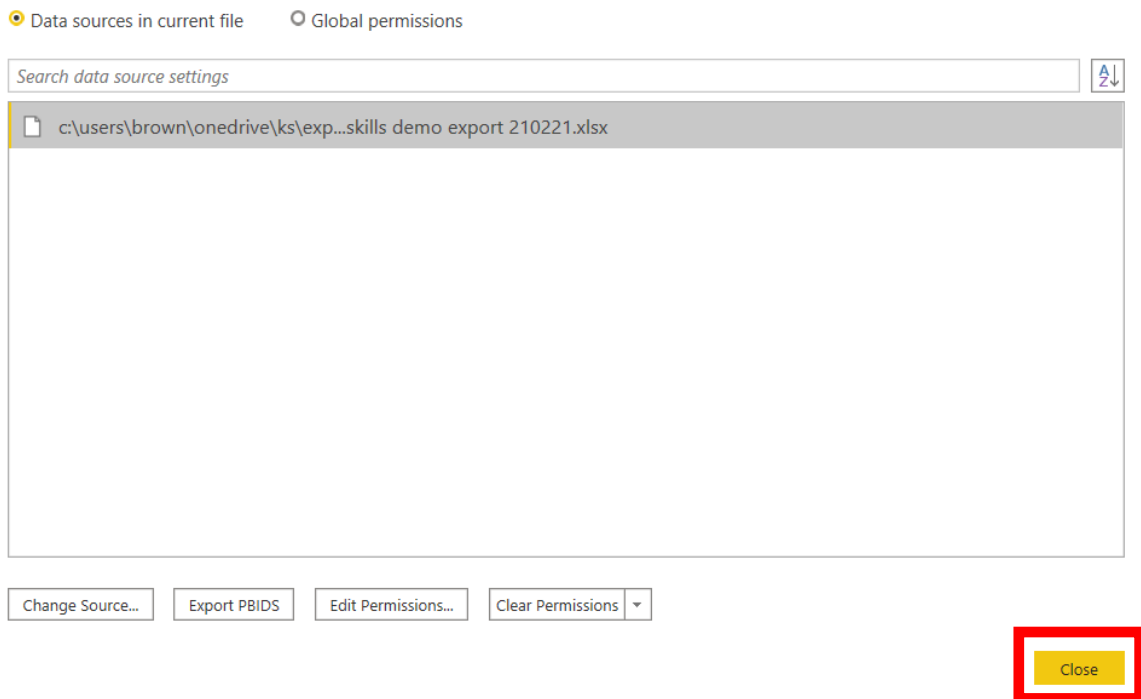
OK

Cancel

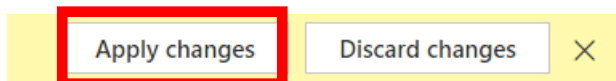
2.6 This updates the file in Data source settings. Click 'Close'.

Data source settings

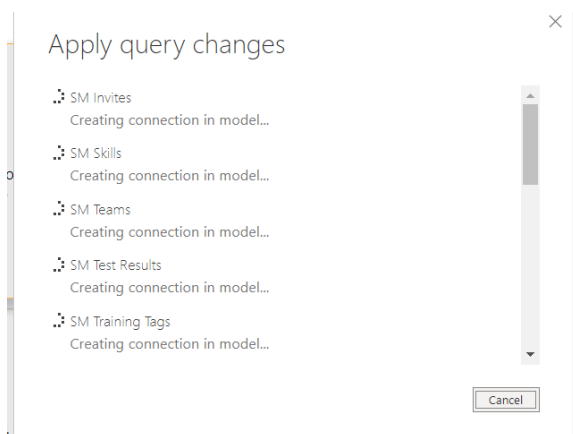
Manage settings for data sources that you have connected to using Power BI Desktop.



2.7. This message will appear in a yellow bar below the Power BI ribbon. Click 'Apply changes'.



2.8. The data now loads to the report and this 'Apply query changes' dialogue box appears. After a few seconds it closes and the report has now been updated.





Scheduling a data refresh using one of our new API calls.

https://online.knowledgesmart.net/api_dev/swagger/ui/index

There are a number of ways to refresh your Power BI data. This article might be useful for you.

[Data refresh in Power BI - Power BI | Microsoft Docs](#)

We also found the below two videos helpful to review:

[How to set up a Power BI Data Source with Data Refresh - YouTube](#)

[Use Microsoft Flow, and other options, to refresh your Power BI dataset - YouTube](#)