

USING THE KNOWLEDGESMART POWER BI GENERAL SURVEY REPORT

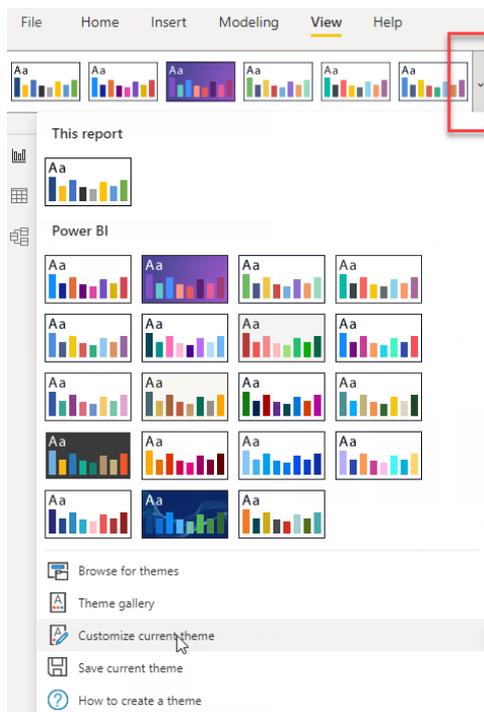
This Power BI Skills General Survey report is provided to illustrate the range of data analysis possible once you have collected the General Survey and Skills Assessment data from your organisation.

The report we provide to you is pre-populated with General Survey and Skills Assessment demonstration data, making it easy for you to explore the visualisations before capturing your own organisation's skills and knowledge.

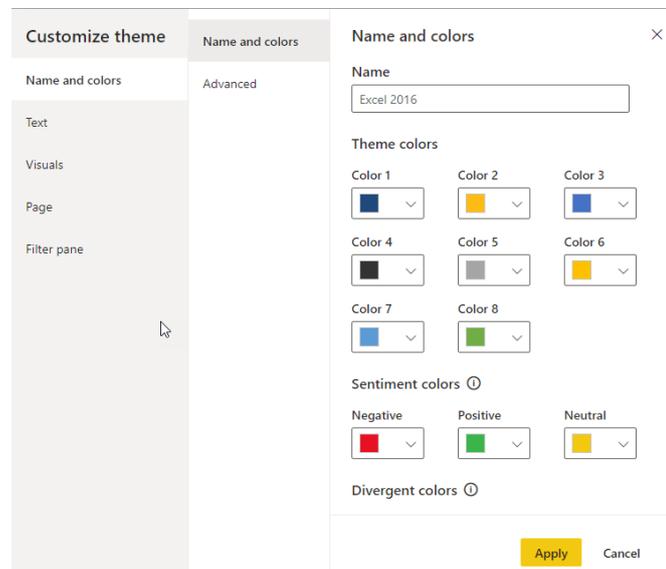
To use the report, you will need the free version of the Microsoft Power BI desktop version. A license is often included with an Office 365 subscription. Microsoft Power BI desktop may be downloaded free from here <https://powerbi.microsoft.com/en-us/desktop/>

This report comprises a mix of different types of General Survey and Skills Assessment data visualisations in sections.

- Invite History
- Survey Response Summary
- Survey Responses
- Background User Data
- Results Analysis

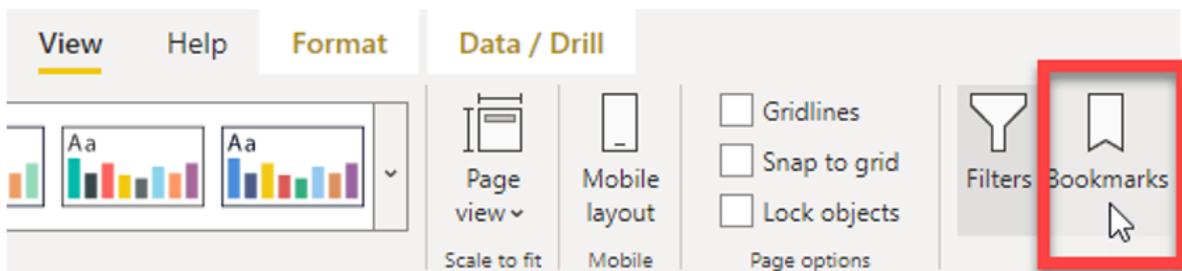


To customise the report theme or theme colours go to view themes and select the drop-down arrow as shown below. Select customize the current theme to update the report colours individually or apply a new theme. You can also upload your unique Power BI theme in . JSON file format.



Let's Get Started!

- Open the General Survey Power BI report using Microsoft Power BI Desktop.
- This report is pre-populated with demonstration data so that you can work with the filters and data visualisations before loading your data.
- The best way to learn about the Power BI visuals is to get stuck in and use the report. There are three ways to move from one report page to the next:
 - Use the navigation buttons (Ctrl-click) on Page 3, Navigation Home.
 - Use page name tabs at the bottom of the screen to move around the report.
 - Use the bookmarks to move between your report pages.



- There is a 'Home' button on each page, which will bring you back to the Navigation Home page.



- There is a 'Reset' button on the filter pages, which will clear all the filters set for that group of visuals. You will also find a 'Reset' button on a number of the visuals pages; it has the same effect of clearing all filters. Any text entered in a 'Search' box of a filter must be deleted manually when a reset is required.



Please note: Power BI desktop buttons only work when the CTRL key is combined with a left-mouse click. To make selections of multiple filter options in one filter panel then hold down the CTRL key whilst making the selection.

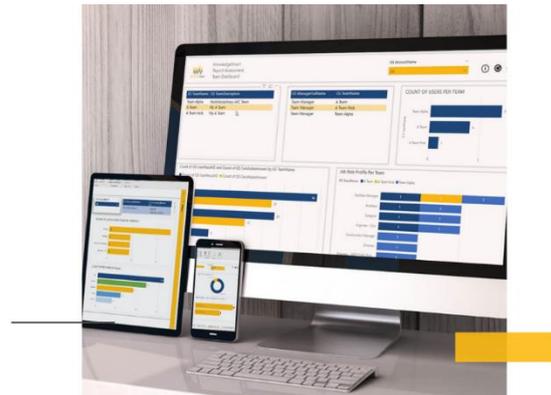
On the following pages of this Help Note, we look at each page in the Power BI report in more detail.

The **Start Page** is the opening image and title. When you create General Survey reports for your organisation you may replace the logo, image, and text with your own.

Welcome to the KnowledgeSmart Survey Report Template

KnowledgeSmart is not just about technology – it is about our people, our culture, our team – and our dedication to collaboration and simplifying the visualisation of digital proficiency.

This report helps you visualise more subjective feedback from users via the general survey platform. This report includes results and team data as well for holistic skills data analysis.



WWW.KNOWLEDGESMART.NET
WWW.AECKILLS.COM

T UK: +44 (0)1225 904 594
T INTL: +1 (727) 608 4331

UK & HEAD-OFFICE: KNOWLEDGESMART, 4 QUEEN STREET, BATH, BA1 1HE, UK.
NORTH AMERICA : KNOWLEDGESMART LLC, 4600 140TH AVENUE, SUITE 180, CLEARWATER, FL 33762, US

Read Me First - Page 1

As the title says, start reading here.



Welcome to the KnowledgeSmart Skills Assessment Power BI Report Template.

This report allows you to import Skills Survey and Assessment data from your KnowledgeSmart account to gain insights into your organisations' inventory of skills and knowledge, training needs and development opportunities.

Demo Data: The report is pre-populated with demonstration data so that you may investigate the types of Skills Survey and Assessment data visualisations on offer. Our demo data is based on the KnowledgeSmart Digital Transformation Survey which you will find in your published survey library.

Your Data: You can easily update this report with your own data and schedule an automated data refresh via one of our API calls. Detailed instructions on the update process using the Power BI export file are included in this report on page 2, User Guides.

Filter Pages: We have grouped all filters at the beginning of the report and each page has a reset button. We have created two filter pages, one for people filters and the other for assessment related filters.

User Guide: A detailed User Guide for this report is available for download from the User Guides page. This document is also available within your KnowledgeSmart account dashboard. Go to 'Settings > Resources' and look for 'Using the KnowledgeSmart Power BI Skills Survey Report'.

This report comprises a mix of different types of Skills Survey and Assessment data visualisations. It is into different sections:

Invite History/User Invite Dashboard: This page helps you analyse data around the number of users and number of survey invites sent on your dashboard.

Survey Response Summary (Pg 8): Key statistics based on your survey data.

Survey Response Pages (Pg 8-14): The survey response pages mostly comprise of bar charts showing survey question responses and respondent names. The ideal chart type you choose will depend on the type of question you have included in your survey. Add more response pages as is required.

Team Dashboard (Pg 15): Summary charts based on your teams data.

Background Data (Pg 17+18): Analyse and compare key statistics around these two areas and view the filtered user data if needed.

Results Analysis (Pg 18-22): Some core visualisations based on your assessment results data. You can use some of your survey responses to filter, segment or group your results data.

User Guide

A detailed User Guide for this report is available for download from the User Guides page. This document is also available within your KnowledgeSmart account dashboard. Go to 'Settings > Resources' and look for 'Using the KnowledgeSmart Power BI Skills Assessment Report'.

Support and help.

For support and help with this Power BI report template please email support@knowledgesmart.net or raise a support ticket via our KnowledgeSmart support hub. Click the orange Support button whilst holding down the CTRL key to reach the support hub.

SUPPORT

User Guides - Page 2

From here, you can download this User guide, one on how to update the report with your data and view Help videos.



USER GUIDE

Comprehensive User Guide.

You may download a detailed Help Note 'Using the KnowledgeSmart Power BI Skills Survey Report' by clicking on the 'User Guide' button whilst holding down the CTRL key.

Data Security Level: High

This report contains confidential data and it is advised to check with the report owners before sharing it.

Sharing this report without consent will be considered a contravention of the company IT policy.

Last edited:

Exporting and loading your own Skills Assessment data.

You may download a detailed Help Note 'Exporting Data and Updating the KnowledgeSmart Power BI Skills Survey Report' by clicking on the 'Export & Update' button whilst holding down the CTRL key.

Two short videos showing the data export and report update process may be downloaded by clicking on the 'Export Video' and 'Update Video' buttons whilst holding down the CTRL key.

Support and help.

For support and help with this Power BI report template please email support@knowledgesmart.net or raise a support ticket via our KnowledgeSmart support hub. Click the Support button whilst holding down the CTRL key to reach the support hub.

USER GUIDE

EXPORT DATA VIDEO

DOWNLOAD DEMO REPORT VIDEO

SUPPORT

UPDATE DATA VIDEO

Navigation Home - Page 3

From this page, you may navigate around the General Survey report. Hold down the CTRL key while left-clicking your mouse button to move to a specific page. When you are on any page, you may return to the Navigation Home page by clicking on the 'Home' button (while holding down the CTRL key).



From this page you may navigate around this Power BI report. Hold down the CTRL key and left mouse click on any of the buttons to take you to one of the pages of filters or visualisations.

On most pages you will find a HOME button like the one below.



Whilst holding down the CTRL key just left mouse click on this button to be brought back to this page.

On the filter pages you will find a RESET button.



Holding down the CTRL key whilst left mouse clicking on the RESET button will clear all the filters. If you have used a search box on a filter you will have to clear that manually.

Look out for the info button each page for an explanation of that page.



1. Read me First

4. People Filters

2. User Guides

5. Invite History

3. Navigation Home

6. User Invite Dashboard

7. Survey Response Summary

14. Team Dashboard

20. General Statistics

8. Survey Responses 1

15. Background Data Dashboard

21. Assessment Statistics

9. Survey Responses 2

16. Background Data Dashboard 2

10. Survey Responses 3

17. Results Overview

11. Survey Responses 4

18. Result Scatter Chart

12. Survey Responses 5

19. Benchmark Comparisons

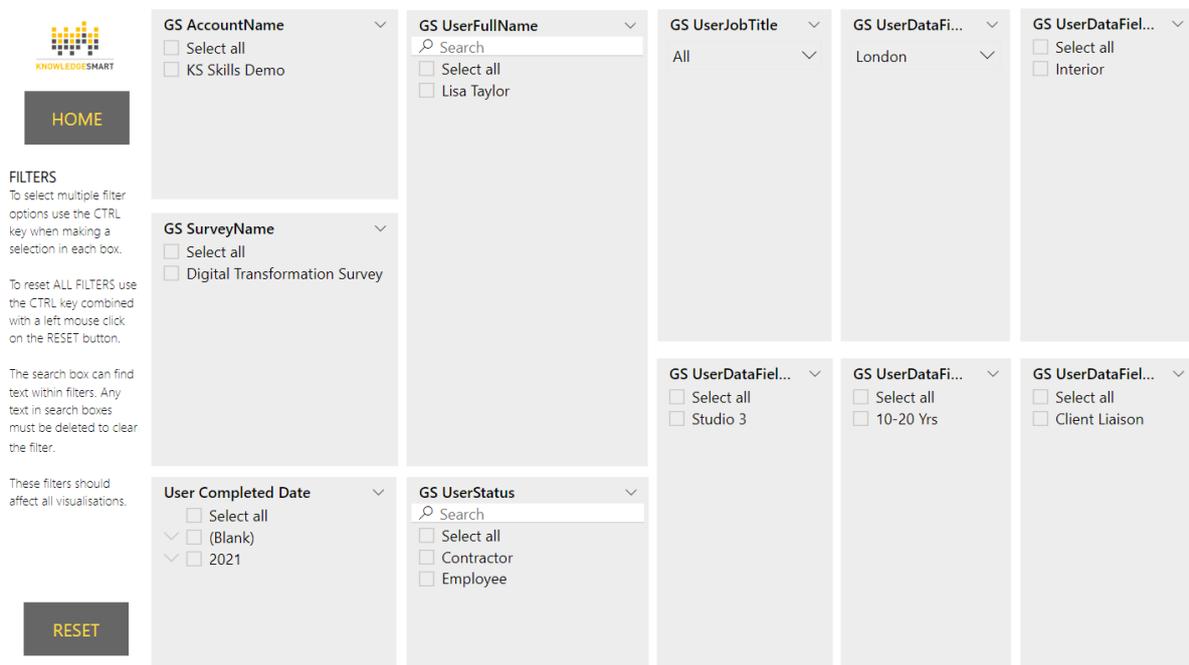
13. Survey Responses 6

The individual buttons can be dragged around the page. Left-mouse click on the button, keep the button depressed, and drag it around. You could create a group of favourite buttons for those pages you find most useful.

Filter Page - Page 4

On this page, you will find a series of filters that affect most visualisations. To activate a filter, click on a box or on the filter name. In the example screenshot below, the filter is set to filter all visualisations to only show users from London, focusing on Facilities Management.

Select a combination of filters or only one before starting to look at your visualisations. Active filters show as black squares. To make more than one filter functional in a selection panel, hold down the CTRL key while selecting the filter. If some filter options appear blank, your user data does not contain these data fields as yet. You can easily add additional user data, such as job title, using the 'Manage User Data' page from your admin dashboard.



The screenshot shows a dashboard with a sidebar on the left containing a 'HOME' button and a 'FILTERS' section. The 'FILTERS' section includes instructions: 'To select multiple filter options use the CTRL key when making a selection in each box.' and 'To reset ALL FILTERS use the CTRL key combined with a left mouse click on the RESET button.' Below this is a search box: 'The search box can find text within filters. Any text in search boxes must be deleted to clear the filter.' At the bottom of the sidebar is a 'RESET' button. The main area contains several filter panels:

- GS AccountName**: Select all, KS Skills Demo
- GS UserFullName**: Search, Select all, Lisa Taylor
- GS UserJobTitle**: All
- GS UserDataFiel...**: London
- GS UserDataFiel...**: Select all, Interior
- GS SurveyName**: Select all, Digital Transformation Survey
- User Completed Date**: Select all, (Blank), 2021
- GS UserStatus**: Search, Select all, Contractor, Employee
- GS UserDataFiel...**: Select all, Studio 3
- GS UserDataFiel...**: Select all, 10-20 Yrs
- GS UserDataFiel...**: Select all, Client Liaison

To reset the filters on Page 4 click on the 'RESET' button whilst holding down the CTRL key. Occasionally Power BI does not reset the filters completely cleanly. You may have to click in a few selection boxes to complete the reset. If you have used any of the 'Search' functions in the filter panels the data will have to be manually deleted. The HOME button will take you back to the Report Navigation page.

Experiment with a few settings to see what effect they have on your visualisations.

INVITE HISTORY

Pages 5-6

The first bar chart shows the number of survey invites segmented by result status (complete, in progress, and not started). The segment colour legend is shown top-left. Filter down to a specific account name, invite sent date, or expiry date by using the on-screen filters.

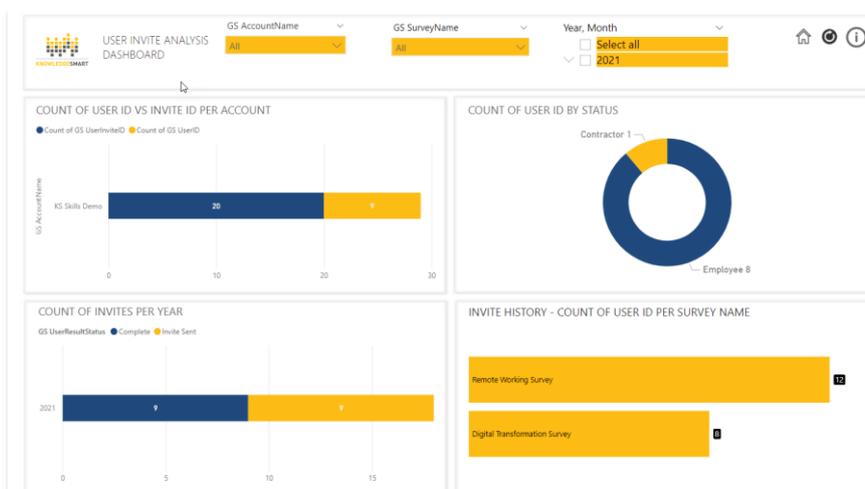


The following report page shows an invite dashboard with four different visualisations. The filters are in sync with selections made on the previous invite report page. On this dashboard, you can see the following charts:

Top left: number of users vs. the number of survey invites issued

Top right: count of Survey User ID by user status (employee, interviewee, contractor, teacher, student), bottom left: count of survey invites per year (segmented by result status)

Bottom right: Count of survey User ID per Survey Name.



SURVEY RESPONSE SUMMARY

Page 7

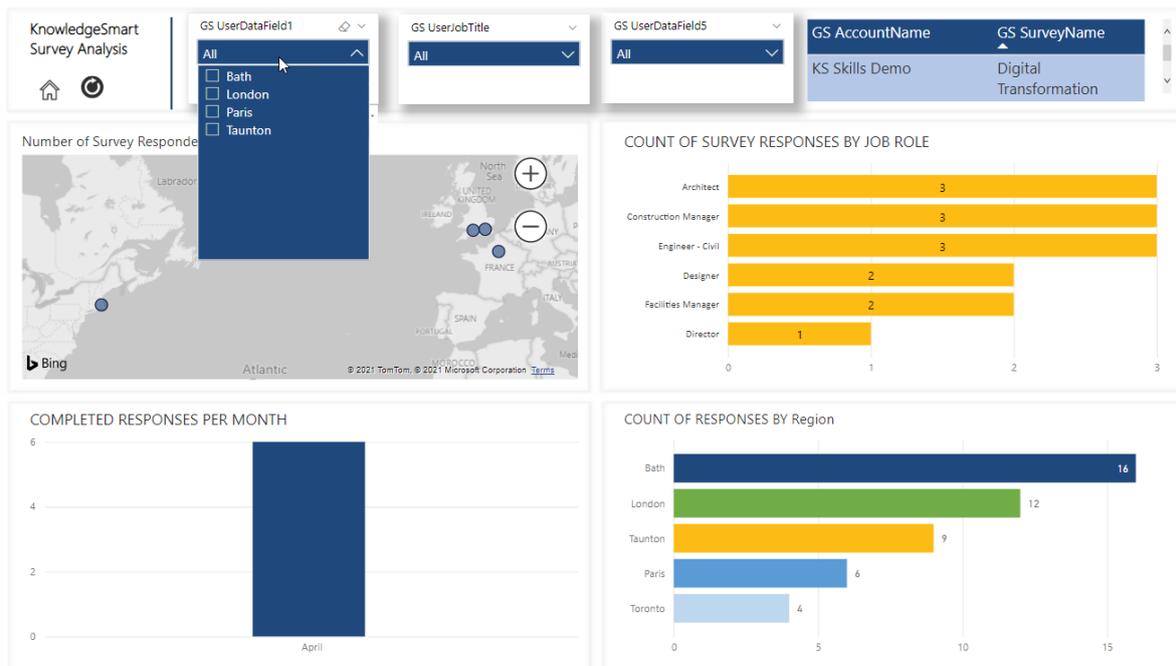
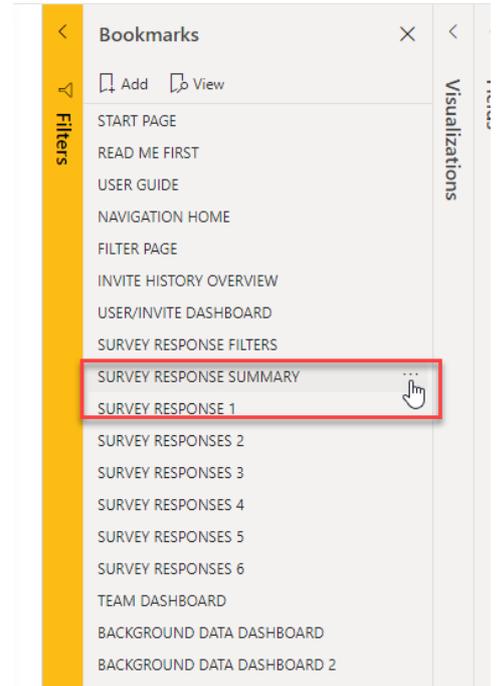
On this page, you will see some summative data based on your survey responses. On-screen filters are available. The top-left shows the number of survey respondents per region. You can easily update the available on-screen filters to other data fields if applicable. If you make changes to the page, remember to update the bookmark for this page.

Our data field 1 in the demonstration data is office location, so we used this to show the region.

Top-right we show the count of survey responses by job role. The job role/job title field comes from our user data and will not be populated unless you have job titles completed under your user data.

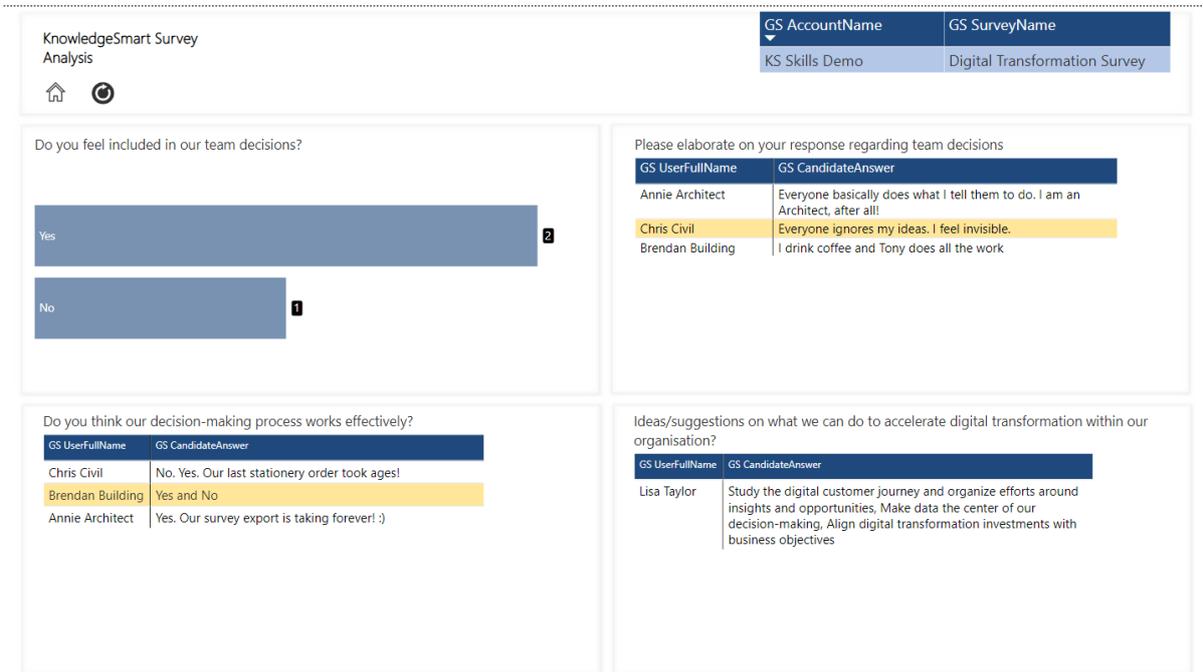
Bottom left, we look at the number of completed responses per month. You can adjust the date hierarchy as needed and easily show the data per year, per day, or quarter.

Bottom right, we count the number of responses by region using our data field 1 again.



SURVEY RESPONSE PAGES

Page 8-14

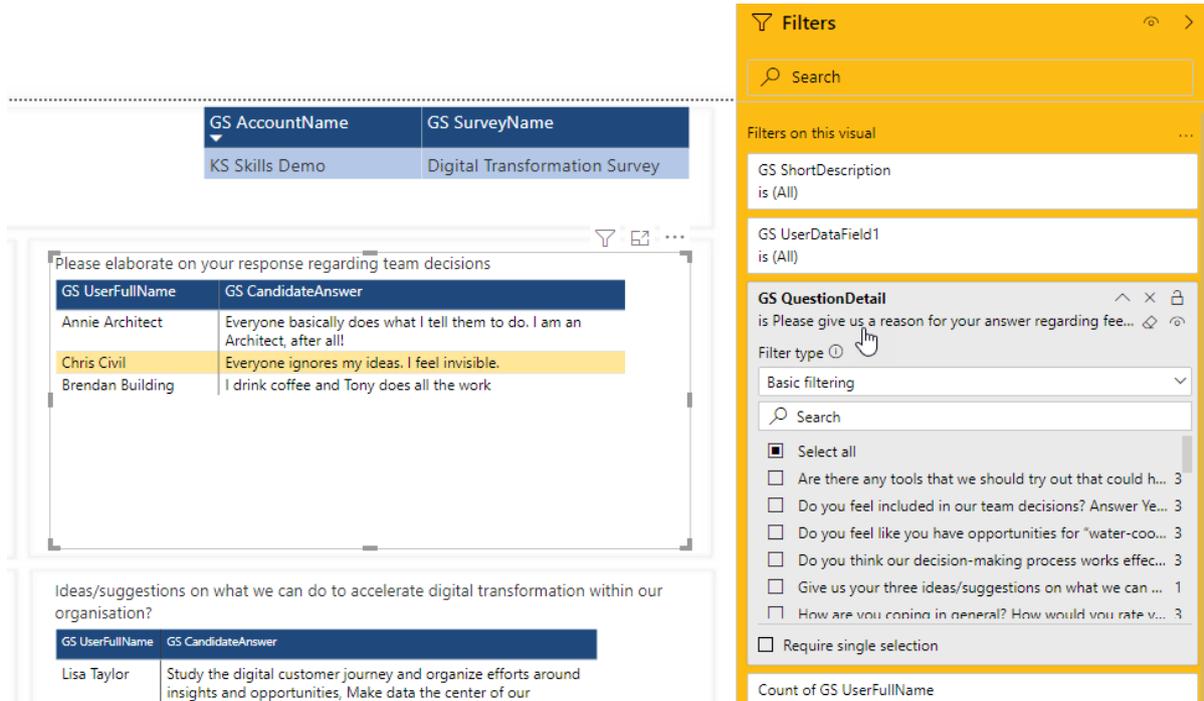


Each survey response has 4 layout areas, and each layout area has a chart or matrix table. Update to a different chart if it will help you display your specific survey responses more optimally.

These pages are based on the KnowledgeSmart digital transformation survey, which forms part of the KnowledgeSmart published survey library. If you are analysing a different survey you will need to open up the visualisation pane for each chart and update it to your fields. In some cases, you will need to use the filter panel as well.

When we select the chart shown below and open the filter panel, we notice that we are looking at a specific question name. You will need to select the question name you wish to analyse. In most cases, you will need to use the data field GS Question Detail from your GS Questions Data inside the filter panel to filter to a specific question.

Use matrix tables to show more wordy responses (typically free-text responses) and bar charts or other charts for shorter responses.



The screenshot shows a survey response page with a table of candidate answers and a filter panel on the right. The table has columns for 'GS AccountName' and 'GS SurveyName'. The filter panel shows 'Filters on this visual' and 'GS QuestionDetail'.

GS AccountName	GS SurveyName
KS Skills Demo	Digital Transformation Survey

Please elaborate on your response regarding team decisions

GS UserFullName	GS CandidateAnswer
Annie Architect	Everyone basically does what I tell them to do. I am an Architect, after all!
Chris Civil	Everyone ignores my ideas. I feel invisible.
Brendan Building	I drink coffee and Tony does all the work

Ideas/suggestions on what we can do to accelerate digital transformation within our organisation?

GS UserFullName	GS CandidateAnswer
Lisa Taylor	Study the digital customer journey and organize efforts around insights and opportunities, Make data the center of our

Filters

Search

Filters on this visual

GS ShortDescription is (All)

GS UserDataField1 is (All)

GS QuestionDetail
is Please give us a reason for your answer regarding fee...

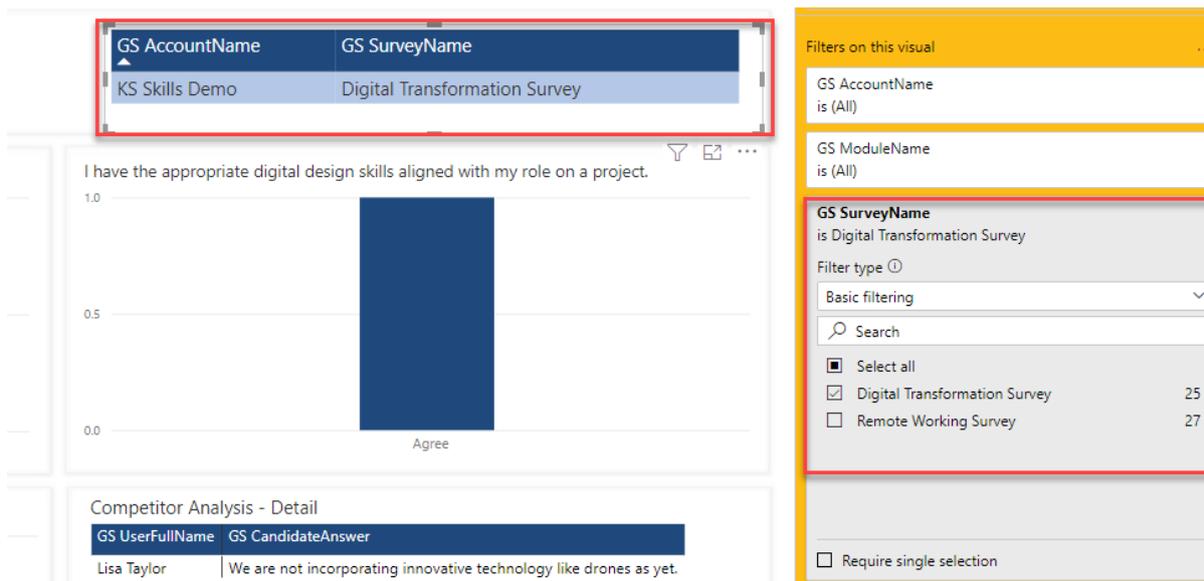
Filter type: Basic filtering

Search

- Select all
- Are there any tools that we should try out that could h... 3
- Do you feel included in our team decisions? Answer Ye... 3
- Do you feel like you have opportunities for "water-coo... 3
- Do you think our decision-making process works effec... 3
- Give us your three ideas/suggestions on what we can ... 1
- How are you coming in general? How would you rate v... 3
- Require single selection

Count of GS UserFullName

Top-right of each survey response page, you will see the name of the survey and your account name. You can update this from the filter panel as well. See below.



The screenshot shows a survey response page with a bar chart and a filter panel on the right. The filter panel shows 'Filters on this visual' and 'GS SurveyName' selected.

GS AccountName	GS SurveyName
KS Skills Demo	Digital Transformation Survey

I have the appropriate digital design skills aligned with my role on a project.

1.0

0.5

0.0

Agree

Filters

Search

Filters on this visual

GS AccountName is (All)

GS ModuleName is (All)

GS SurveyName
is Digital Transformation Survey

Filter type: Basic filtering

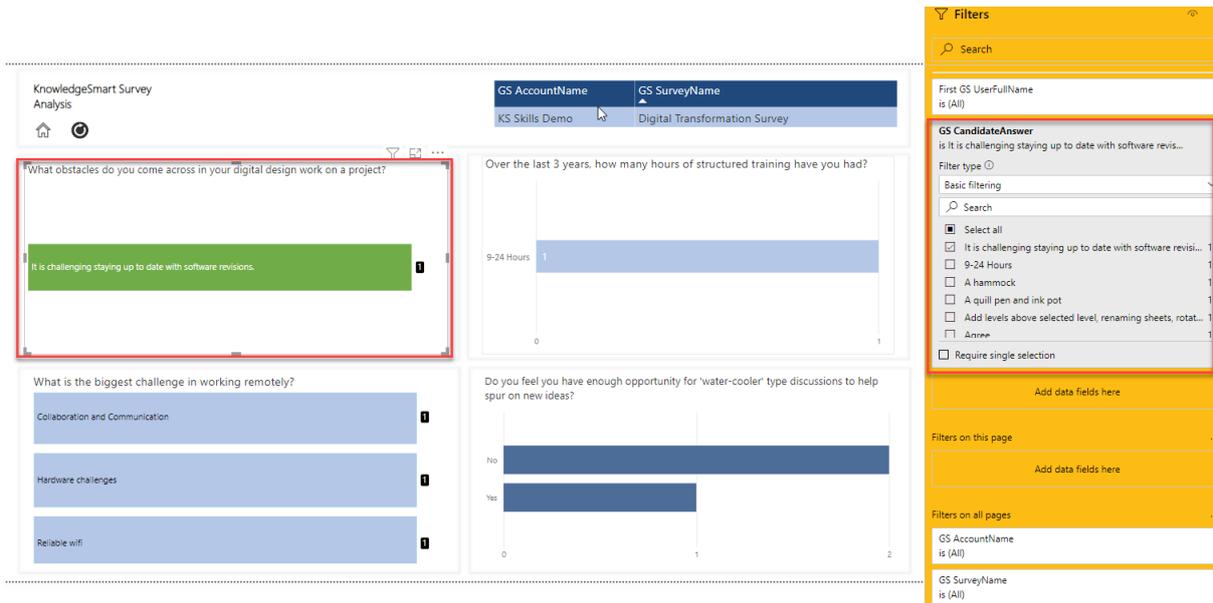
Search

- Select all
- Digital Transformation Survey 25
- Remote Working Survey 27
- Require single selection

Competitor Analysis - Detail

GS UserFullName	GS CandidateAnswer
Lisa Taylor	We are not incorporating innovative technology like drones as yet.

In some cases, you will need to filter to the candidate answer (GS CandidateAnswer) to show that detail on your chart.



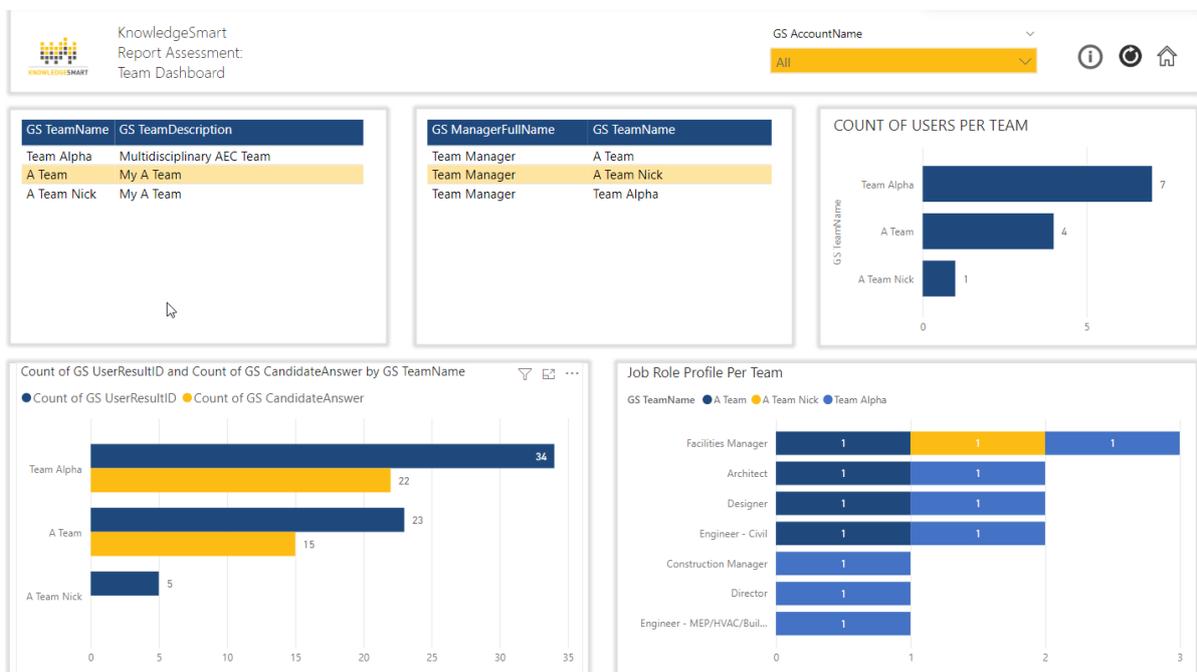
The report includes 6 survey response pages, but you can easily add more simply by duplicating one of the pages, renaming it, and updating it.

TEAM DASHBOARD

Page 14

The next page helps you visualise your team data. If you do not have any KnowledgeSmart teams or managers, these visualisations will not populate once you update your data.

Read the chart titles for detail on each chart.



BACKGROUND DATA

Page 15-16

Here you will see a dashboard with all background data captured for your organisation. Keep in mind the data capture of background information is not compulsory, and you have to switch this on via your interface settings.

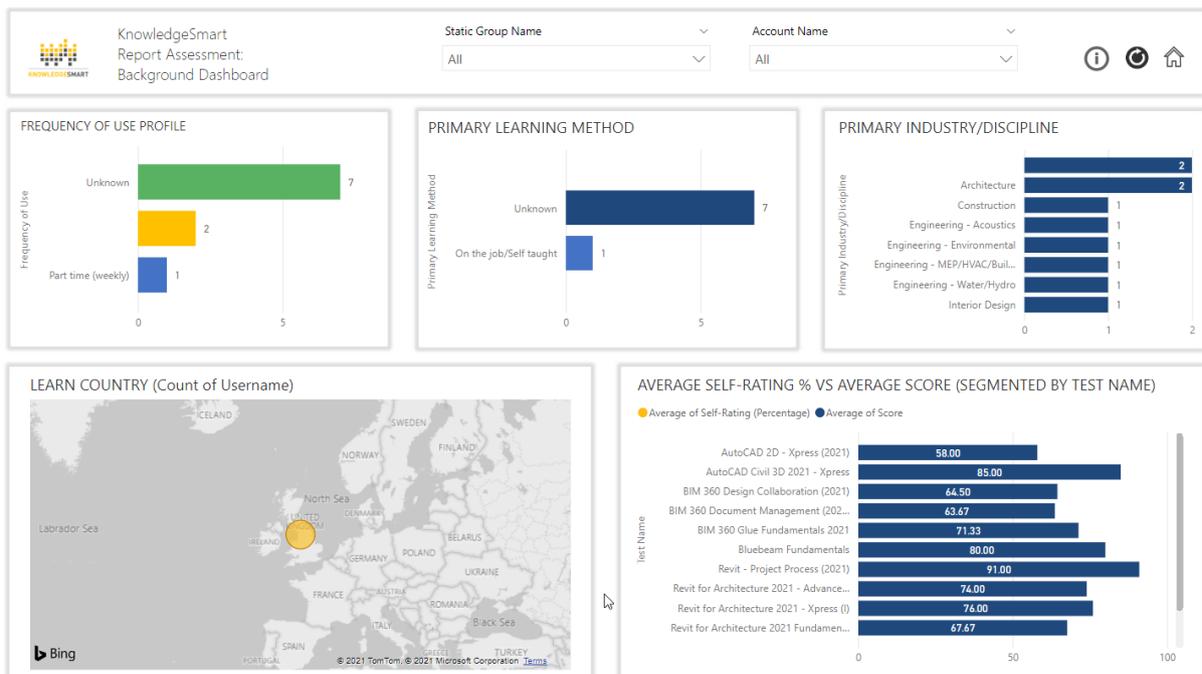
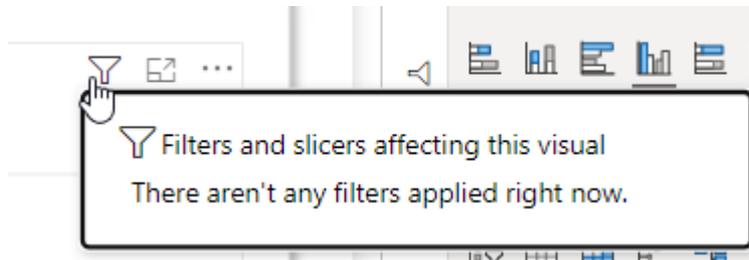
Background fields include Learn Country, Primary Learning Method, Frequency of Use, Primary Industry, and Primary Industry.

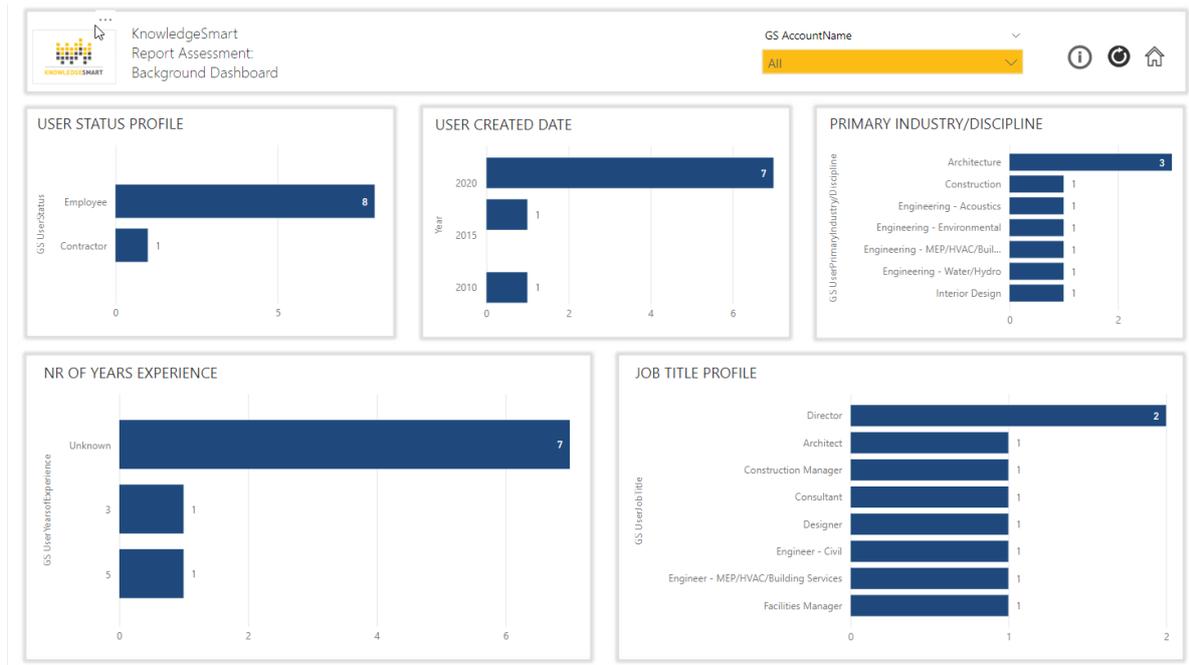
The next page offers some benchmark comparisons.

The shared axis is set to data field 1 (office location in our demo dataset), but this can easily be swapped out for test name, account name, or one of your data fields. Before you add a new field, always check if there aren't any existing filters on that chart already.

UI options

- Show linked accounts
- Display 'Skip question' button:
- Display 'Request training' button:
- Display user data capture page 1 (start):
- Display user data capture page 2 (end):
- Hide test 'Logout' link:
- Enable user page access:
- Show digital proctoring message:

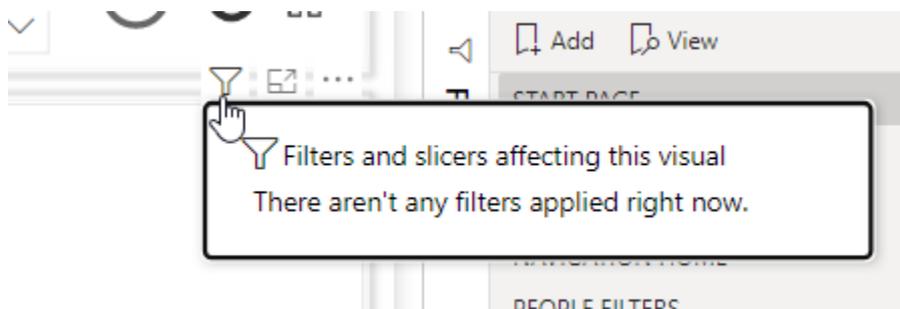




RESULT ANALYSIS

Page 17-22

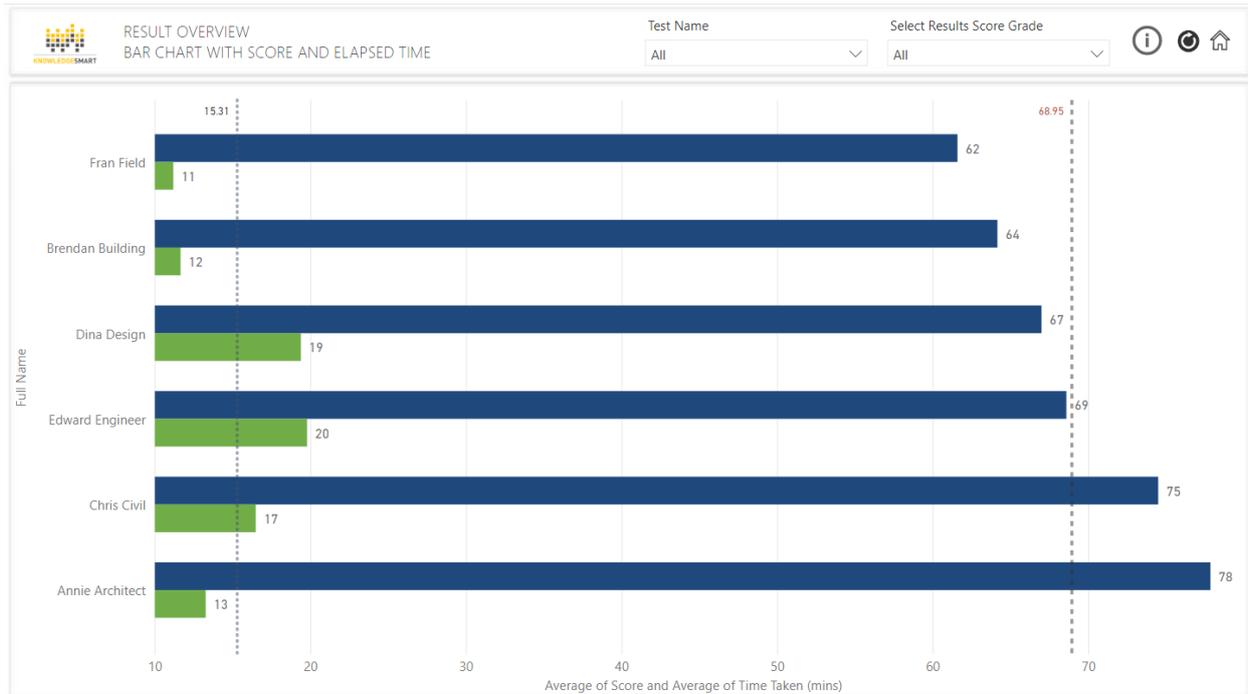
The next group of visualisations focuses on your results data. There are some on-screen filter options but always keep your other filters in mind when making your selections. Hover your mouse over the filter icon on the visual header to quickly see if any filters are applied.



The horizontal bar chart measures score (in green) and elapsed time (in blue). There are two average lines so that you can compare your results against the company average. The average company score is in red, and the average elapsed time is in black.

The Result Score Grade filter helps you focus your visualisation on a specific group of results.

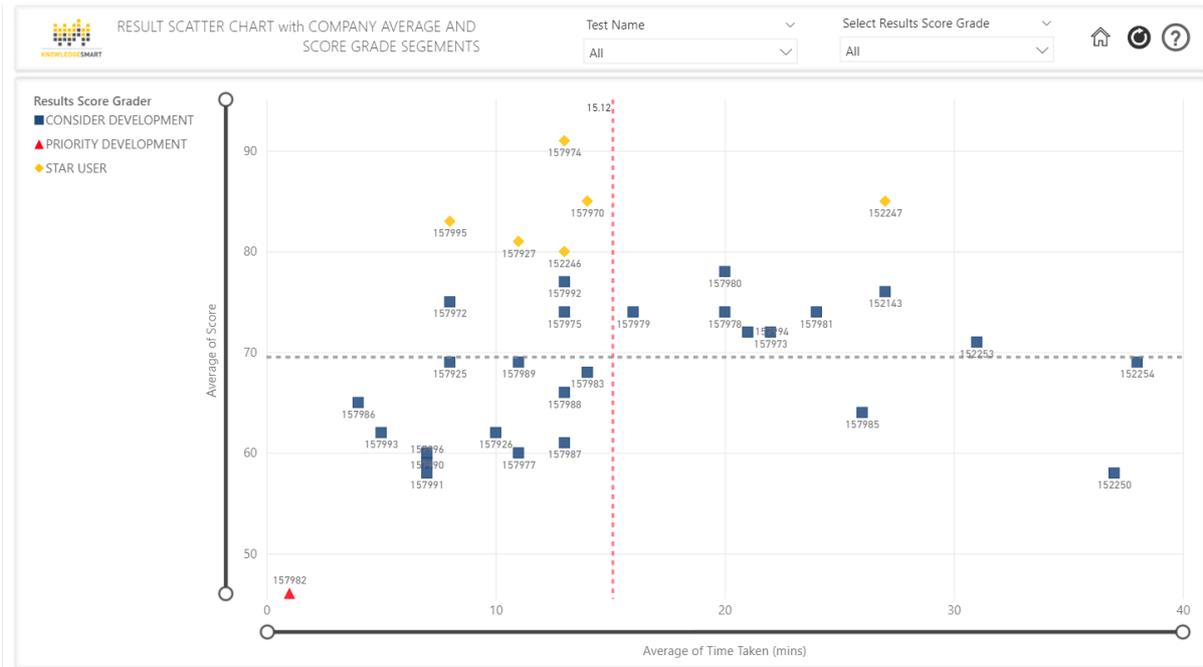
- Priority Development – Scores between 0-49%
- Consider Development – Scores between 50% and 79%
- Star User – Scores of 80% or higher



**** Swop our the GS UserFull Name X-Axis Field for GS UserID or GS UserInviteID if you don't want to display full names.**



The next visualisation is a result scatter chart.



A scatter chart shows the relationship between two numerical values, and in our case, it is the average score versus the average elapsed time. We have also colour coded and grouped the results based on our result score grade.

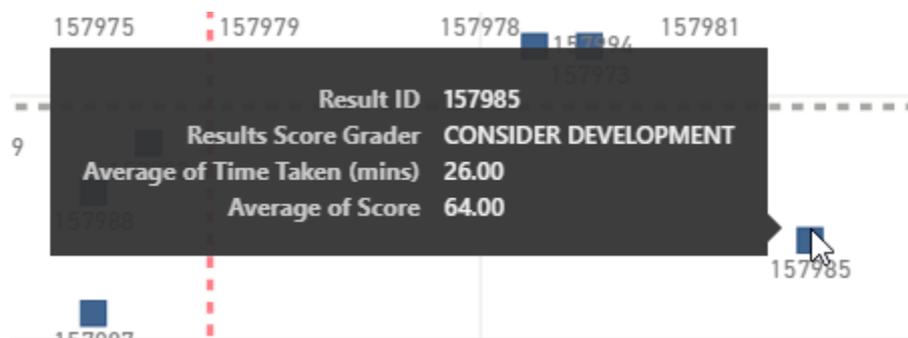
Results Score Grader

- CONSIDER DEVELOPMENT
- ▲ PRIORITY DEVELOPMENT
- ◆ STAR USER

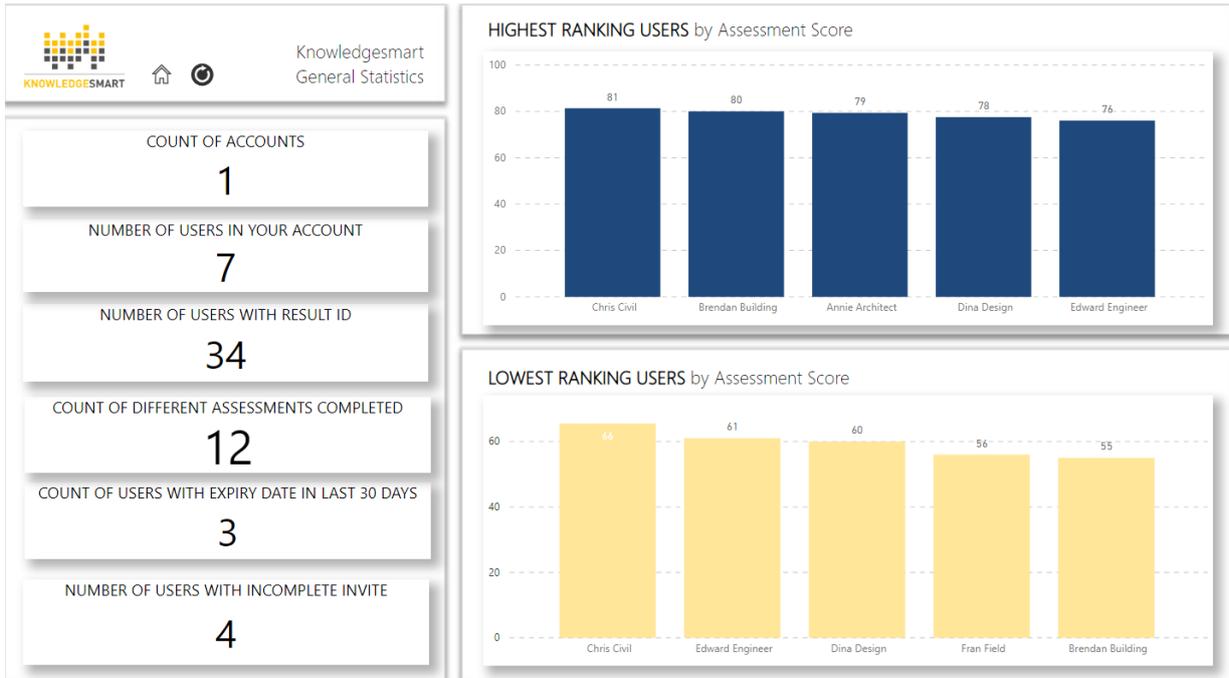
There are two average lines that you can use to compare your results to, average company score and company average elapsed time. The average company score is shown in dark blue and the company average elapsed time is in red.

Use the Zoom slider feature (as per the above red rectangles) to zoom in and out of the scatter chart as required.

If you hover your mouse over the scatter icon, you will notice a tooltip with more information.

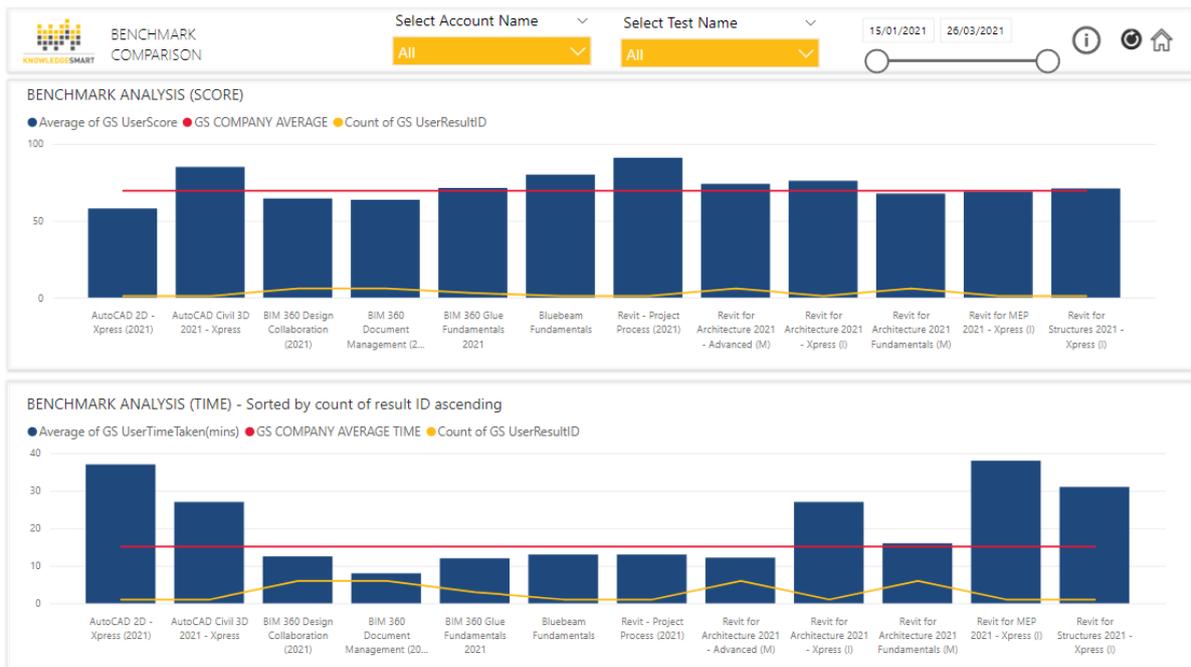


Next, we look at a general statistics page.

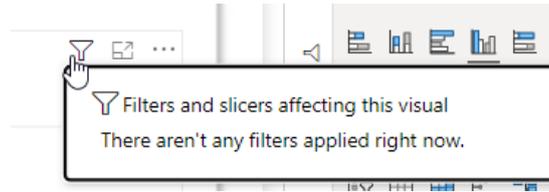


On the left-hand side, you can view some key statistics, and on the right, your highest and lowest ranking users as far as assessment score is concerned.

Benchmark Data is the next category.



The shared axis is set to test name, but this can easily be swapped out for account name or one of your data fields. Before you add a new field, always check if there aren't any existing filters on that chart already.



It is possible to incorporate a KnowledgeSmart global benchmark score or elapsed time but keep in mind we only offer global benchmark data for our main assessment titles (AutoCAD, AutoCAD Civil 3D, Revit MEP, Revit Structure, and Revit Architecture). If you have customised an assessment, a global benchmark comparison might be misleading due to the significantly different module structure. In the above example, the global benchmark score is in red at the top and the global elapsed time is in black on the bottom chart.

** Use your filter panel to filter your skills assessment results by one of your survey responses or a group of survey responses for additional insight.

The last page offers an example of a results dashboard where we are viewing 2 different visualisations. Use the result score grade filter to view statistics for a specific segment of your data.



Chart 1 (top) allows you to view the average score (blue), average elapsed time (yellow) per Office Location.

Office Location is one of the data fields on our demo dataset. If you have not defined your data fields under users, then you can choose a different field to group your results assessment title.

Chart 2 (bottom) allows you to view the average score (blue), average elapsed time (yellow) per year.