

USING THE KNOWLEDGESMART POWER BI SKILLS ASSESSMENT REPORT

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

The report we provide to you is pre-populated with Skills Assessment demonstration data, making it easy for you to explore the visualizations before capturing your own organization'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 Skills Assessment data visualizations in sections.

- Invite History
- Results Analysis
- Module Performance
- Question Performance
- Training Tag Analysis
- Training Request and Skipped Questions
- Scorecard Visualisations

Let's Get Started!

- Open the Skills Audit 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 visualizations 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:
 - o 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.
 - o 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 as 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 Skills Assessment reports for your organization you may replace the logo, image, and text with your own.





Skill Assessment Report Template

Verify skill ratings Resource Projects Identify Skills Gaps and Activate Personalized Learning Find Mentors Build Teams View Benchmarks



Read Me First - Page 1

As the title says, start reading here.



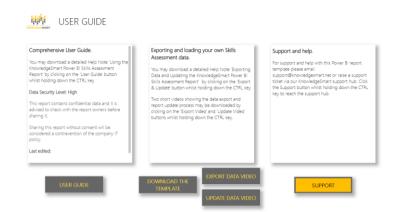
User Guides - Page 2

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

Email: support@eaglepoint.com www.eaglepoint.com







Navigation Home for Usage Reports and Results Reports - Page 3-4

From this page, you may navigate the usage report pages of the Skills Assessment 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).



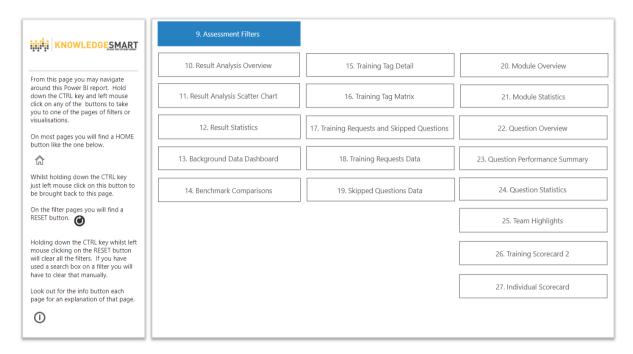
The individual buttons can be dragged around the page. Left mouse click on the button, keep the button depressed, and drag it around. You could create a group of favorite buttons for those pages you find most useful.

Email: support@eaglepoint.com www.eaglepoint.com



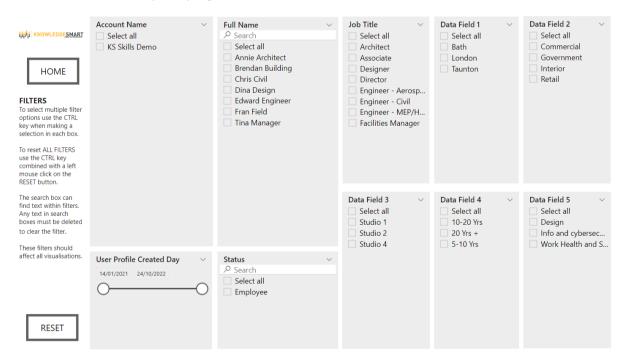


There is a separate navigation menu for the result report pages.



People Filter Page - Page 5

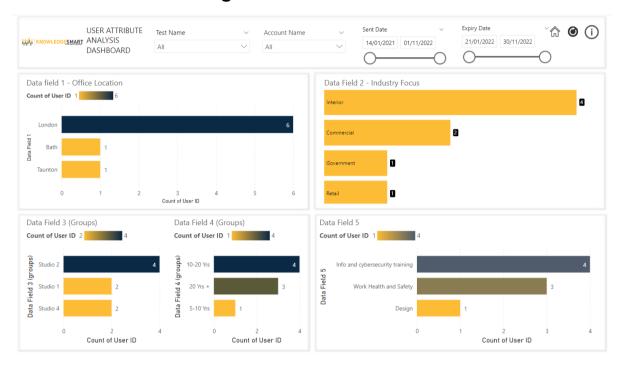
Certain pages will offer on-screen filter options but this page allows you to apply filters once to all report pages.







Attribute Dashboard - Page 6



Invite History Analysis - Page 7

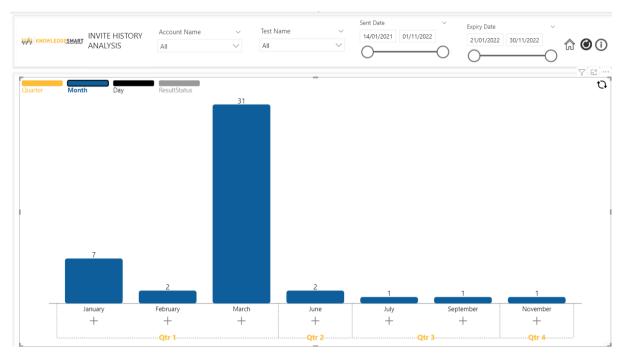
On this page, you can view invite progress with status.







Use the filters provided. Clicking quarter, month, day or 'resultstatus' will dynamically update the visualization for example,



General Statistics

Pages 8



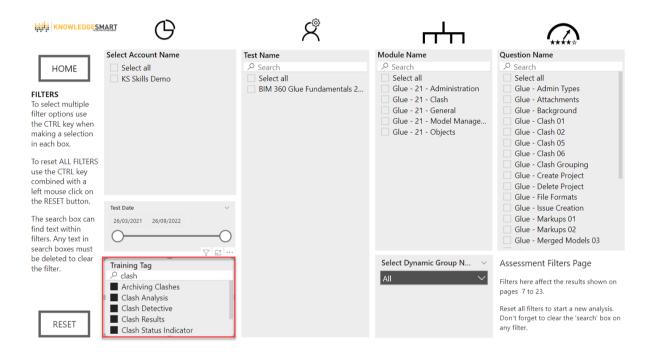


On the left-hand side, you can view some key statistics, and on the right, your highest and lowest ranking users as far as assessment score is concerned.

Assessment Filters - Page 9

This page of filter panels is based on characteristics such as Name, Team, Account, etc. The filter system works the same way as for Page 6 – People Filters.

In the example below, we have filtered to training tags with the word 'clash'.



To reset the filters on Page 9 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.

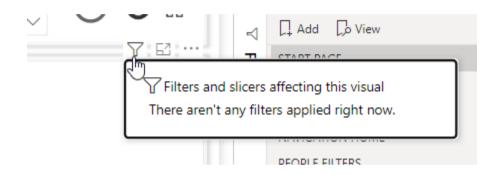
The filters on pages 6 and 9 can work together or independently. Experiment with a few settings to see what effect they have on your visualizations.

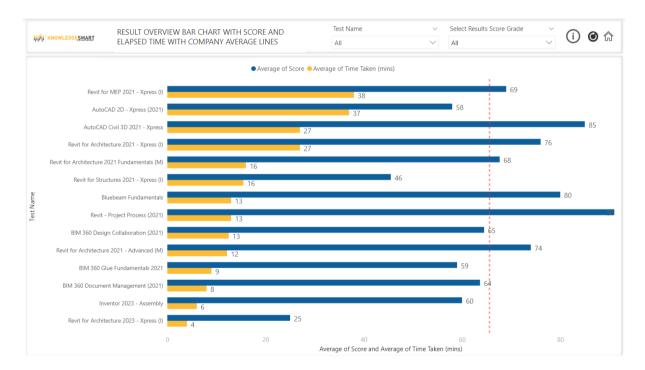


RESULT ANALYSIS

Page 10

The next group of visualizations focuses on your results data. There are some onscreen 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 the score (in blue) and elapsed time (in yellow). There is an average line (formatted to red) so that you can compare your results against the company average.

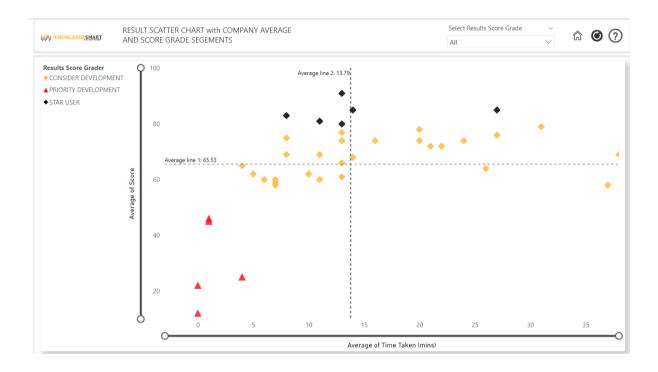
Use the test name drop-down filter to view the results for a specific test only.

The Result Score Grade filter helps you focus your visualization 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

The next visualization 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.

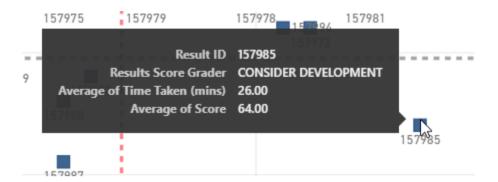


There are two average lines that you can use to compare your results to, average company score and company average elapsed time. The average company score is shown in dark blue and the company elapsed time is in red.

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.



You can easily adjust the colours associated with each symbol or the symbol itself.



Next, we look at the results statistics page – page 12



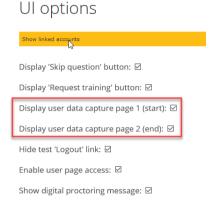


Here you can review the average score, average elapsed time, count of training tags, and count of result IDs per test name. Use the on-screen filter options at the top to filter via account name, via test name, or results score grade.

Background and Benchmark Data is the next category - Page 13

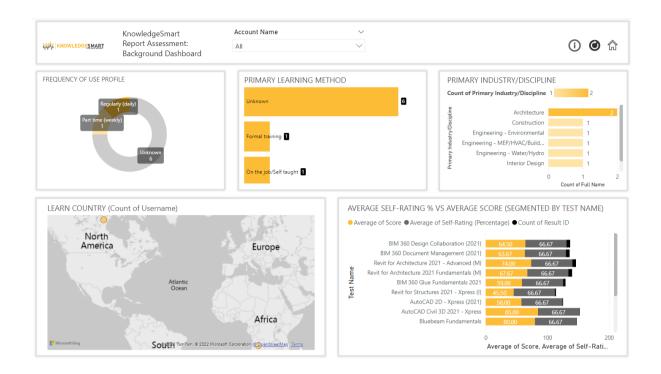
Here you will see a dashboard with all background data captured for your organization. Keep in mind the data capture of background information is not compulsory, and you must switch this on via your interface settings.

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



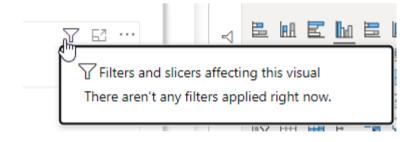
Email: support@eaglepoint.com www.eaglepoint.com



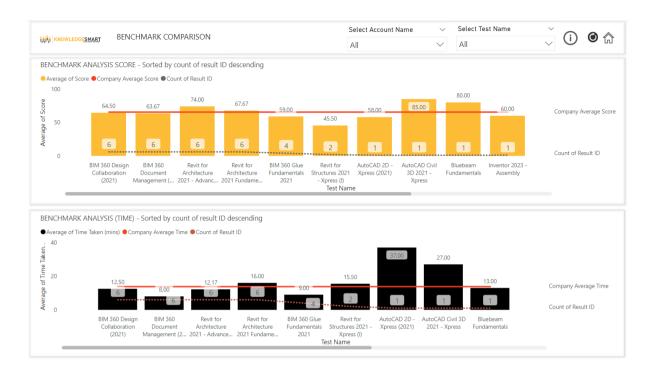


The next page offers some benchmark comparisons page 14

The shared axis is set to data field 1 (office location in our demo dataset), but this can easily be swapped out for a 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.







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 customized an assessment, a global benchmark comparison might be misleading due to the module structure being significantly different. 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.

We now move on to Training Tag Analysis

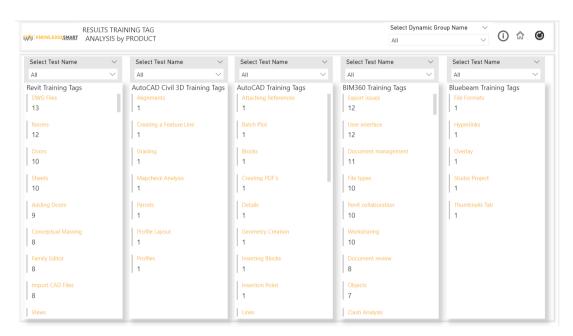
A training tag is flagged when a user scores incorrectly on a question, selects the training request button, or skipped the question button.

The Training Tags (pages 15-16) focus on training tags, showing the opportunities for learning and development identified by Skills Assessments.

The first page offers the opportunity to analyze the count of result ids per training tag. Each column offers the opportunity to filter to a specific test or group of tests. This drop-down filter can easily be swapped out for an account, a group, a dynamic group, or even a team. You can also apply a dynamic group name filter at the top which will affect all columns. Hover over the information sign for more guidance.



The measured value is the count of unique result ids per training tag. The chart is sorted by the count of result IDs descending.



The next page (16) offers an alternative way to analyze your training tags per individual (or by group or account name if the full name field is swapped out).

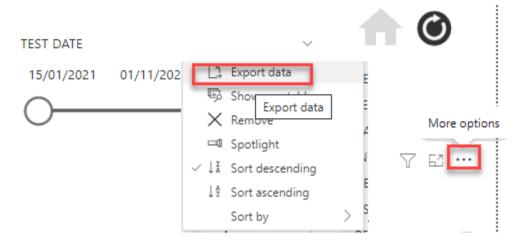
The chart has conditional formatting to show a grey background if the cell is blank and then a colour range that grows darker with the count of Result ids. We are counting the number of result IDs per training tag.

Filter to a specific test, account name, or test period at the top. Swap out the full name field for groups, dynamic groups, account names, or test names.





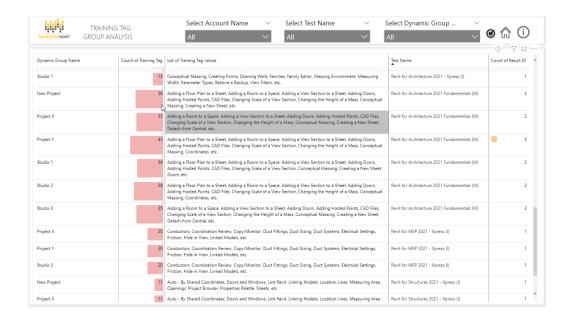
Access the three dots on the top right of the visualization to expand more options. Choose export data to take an export of your filtered data or show it as a table.



Below is another example of a matrix chart that you can easily build out – currently not part of the template.

In the below matrix chart, we offer the opportunity to analyze your training tags per dynamic group. If you don't have dynamic groups defined in your admin dashboard, then the chart might not appear as expected. You can easily swap out the dynamic group column with a different field for grouping. The count of the result ID is flagged with a yellow icon if the count is more than 5. This can easily be adjusted under conditional formatting.

To reset filters, use the reset icon bottom right (Ctrl-click).



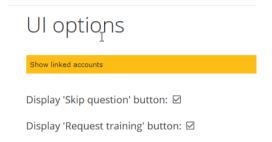


The next category is training requests and skipped questions (Tab 17)

This data is collected when a user selects one of the buttons shown below during their assessment.

Please enter your answer:		
Submit your answer	Request training	Skip question

If these buttons are not visible to your users, you might need to adjust your interface settings.



The left-hand side of the page deals with training requests, and the right-hand side deals with skipped questions.

Here we can compare the number of questions where the training request button was selected versus the number of times the user selected the skipped question button. We are counting the unique number of result ids per question name. Ctrl-click, the people icon to see the relevant filtered raw data. The bottom two visualizations show the relevant training tags. Use your filter panel to filter to a specific count of result IDs e.g., result ID is more than 1. Hover over the bars to see a tooltip with full names.





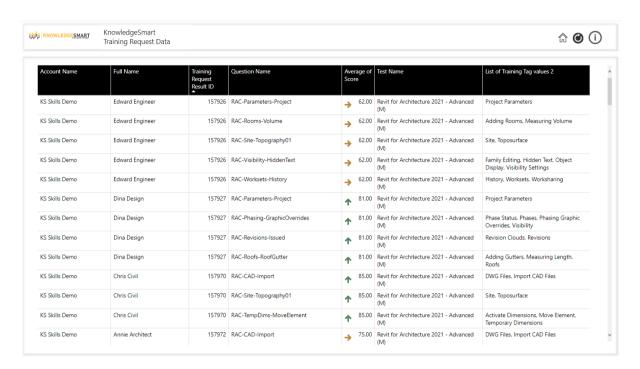
Ctrl-click the people icon (shown below) to see the relevant filtered raw data as shown below. Follow the on-screen guidance to export the filtered user data for further analysis.



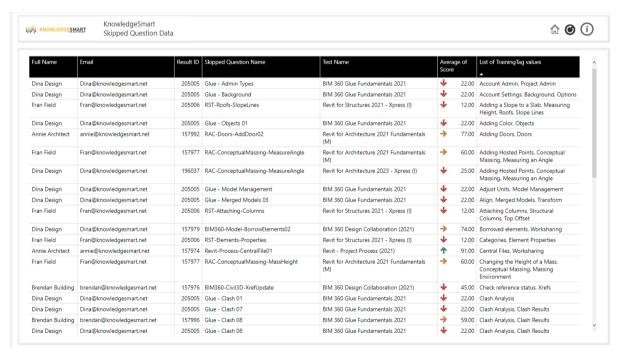
Conditional formatting is found in the score column. The green arrow means the score is above 80% (star user), the yellow arrow means \Rightarrow the score is between 50-80% (Consider development), and the red arrow means the score is below 50%.







Next, you can view your skipped question data. The same conditional formatting is applied to the score column.



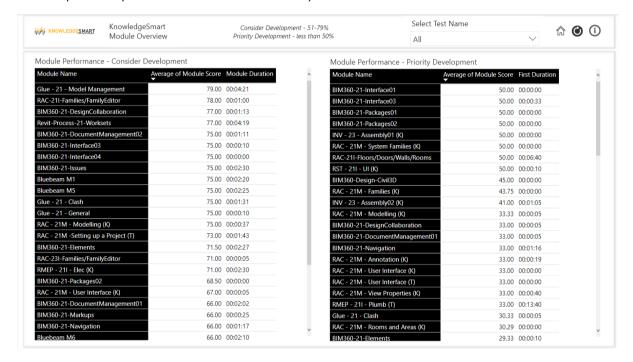




The next category is Module and Question Analysis

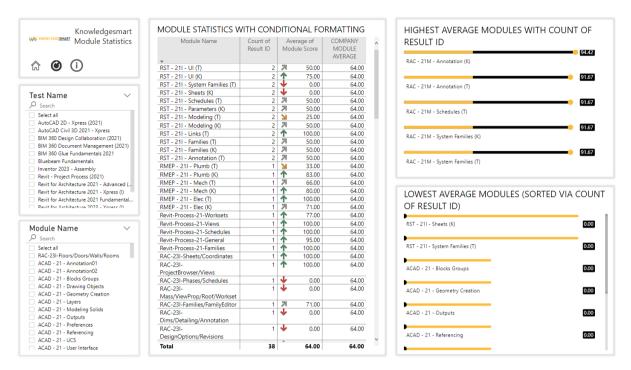
First, we look at module analysis.

Compare the average module score and average module elapsed time (minutes) with the first overview visualization. The left-hand side matrix draws attention to those modules that fell into the 'consider development' grade (module score between 51% and 79%) whereas the matrix on the right focuses on priority development (module score below 50%)



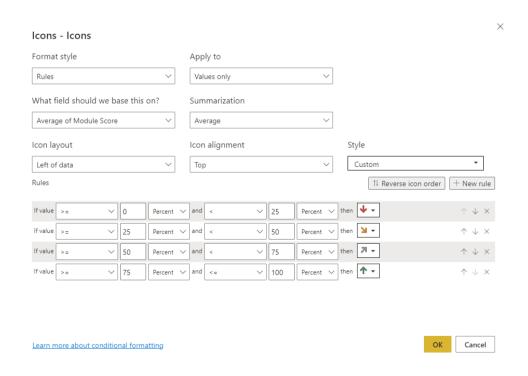
The following report page offers key statistics about module performance. Below we have filtered to BIM360 Document management and noticed some conditional formatting in the average module score column.





The Module Statistics matrix visualization looks at the count of usernames, average module score, company module score average, and count of result ID.

The average module score column includes conditional formatting as per the below rules.





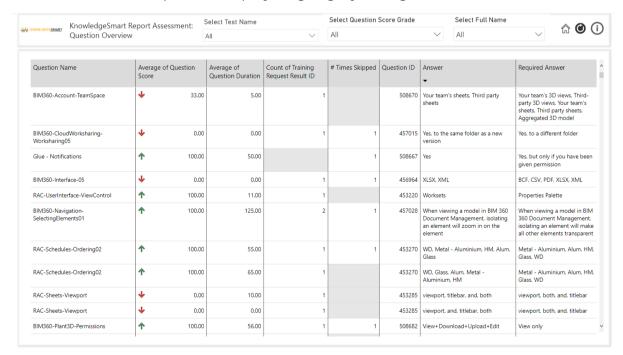
With the lowest and highest average module score visualizations you might need to add a 'count of result ID' filter to help filter our outliers e.g., exclude result ID = 1. This will improve the quality of the visualization.

Next, you will see similar report pages for question performance (pages 22-24)

The first one is called Question Overview (22)

Here you are looking at a matrix chart that measures the average score and average question duration (seconds) per Question Name. There are two new columns here that allow you to analyze the actual answer selected or entered versus the required answer. This may be of value specifically for decimal-based answers or free-text answers where white space and capitalization might have affected results. White space variance is toggled on by default against each question and you can apply an acceptable range for decimal-based answers if you feel this will benefit users and is acceptable based on your standards. It can also be valuable to identify trends within teams or groups which can then influence future upskilling initiatives.

We also included the number of training requests per question name and the number of times a question was skipped. Filter to a specific individual, test name, or question grade at the top. Filter to a specific group or account name within the black filter panel on the right. If skipped questions or training request result ID was blank then we opted to display a light grey background.

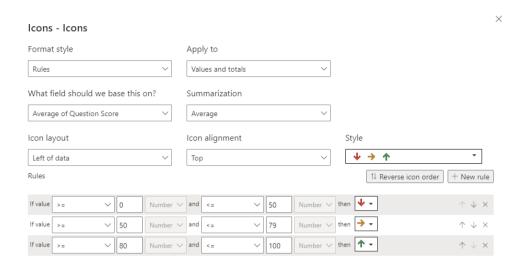


Use the question grade filter to help you focus on a specific group of results.

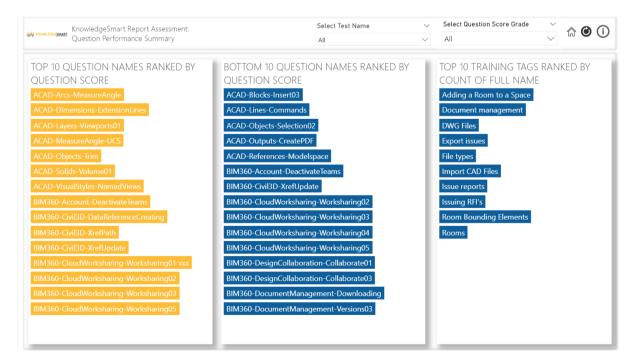


Here we offer a variety of conditional formatting options to show you what is possible. You can easily remove this.

1) Question Score Column



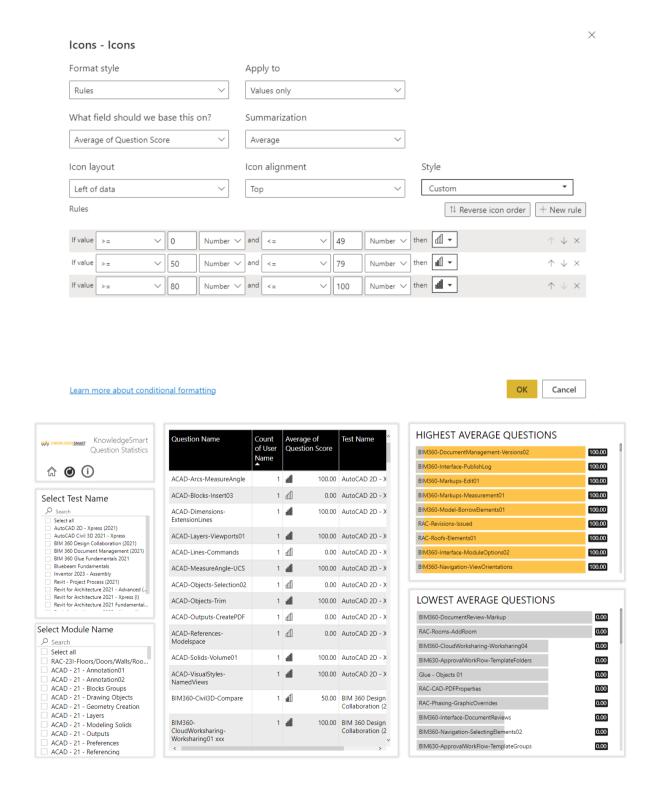
The next page (23 – question performance summary) offers the opportunity to identify the top 10 question names ranked by question score, the bottom 10 question names ranked by question score, and the top 10 training tags ranked by count of the full name. Filter to a specific test name or question score grade at the top.



Next up is Question Statistics (page 24) - Filter to a specific test name and/or question score grade using the on-screen filter options.

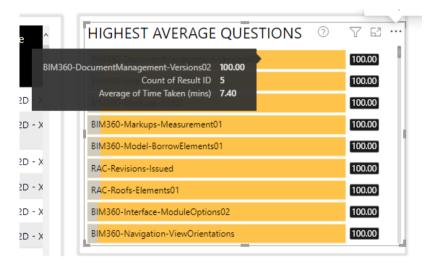


The Question Statistics Statistics matrix visualization looks at the count of usernames, average question scores, company question score average, and count of result ID. The average question score column includes conditional formatting as per the below rules.

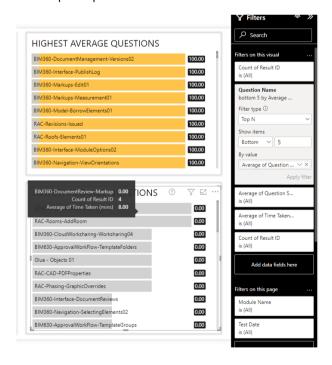




The highest average question bar chart values are overlapped with the count of result IDs. Hover over a bar to view a tooltip of the average time taken as well.



The lowest average questions isolated the bottom 5 questions by question score and shows the count of result IDs for each question. Hover over the bars to view the average elapsed time per question as well.



The last category of the report focuses on scorecards. We have created three scorecards for you to suggest how some of our visualizations can be combined into one report page to help you position your data.



The first one is called: Team Skill Highlights (25)

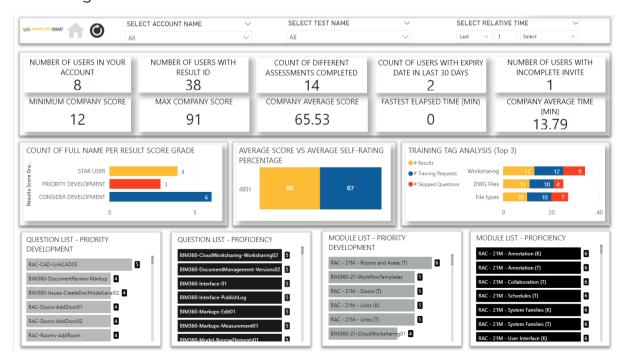
The top section contains several key statistics.

- Number of users in your account
- Number of result IDs
- Number of different Assessments completed
- Count of users with expiry date in the last 30 days
- Number of users with an incomplete invite
- Minimum and Maximum company score
- Company Average Score
- Fastest Elapsed Time (Min)
- Company Average Time (Min)

The middle section shows a visualization around the count of result ids per result score grade. The middle one is about comparing the average assessment score with the average self-rating. The self-rating is captured during the Assessment journey and indicates the user's confidence in competency around the Assessment topic. Ideally, we do not want to see a significant discrepancy between the self-rating and average scores.

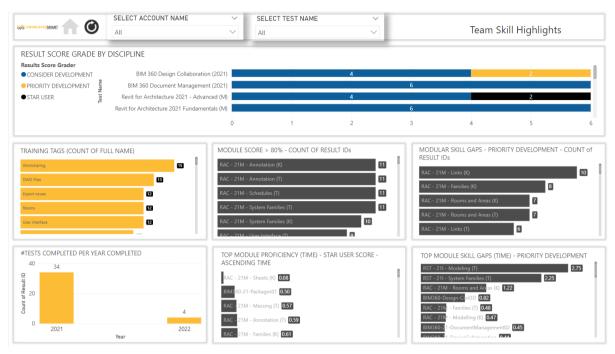
The training tag visual compares result IDs between results training tags, skipped questions, and training requests.

The bottom of this page shows the question names and count of result IDs per category. The left-hand side visualization focuses on priority development (question score below 50%), and the one next to it is around proficiency (question score above 80%). Similar visualizations for module performance are available bottom right.





Team scorecard 2 is next (26)



- At the top, you can view the count of result IDs per result score grade per test name. Below that is the count of full names per training tag.
- To the right of that, two visualizations focused on module proficiency (average module score > 80 descending with a filter of the count of result ID > 1.
- Middle right is module skill gaps (average module score < 50 ascending with a filter of the count of result ID > 1).
- The bottom row starts with the number of tests completed per year. The bottom middle is top module proficiency as far as elapsed time is concerned (elapsed time is shown in minutes, ascending, so the fastest modules are shown at the top). This can then be compared to the modules that took the team the longest to complete bottom right (elapsed time is shown in minutes, descending).
- Use the result score grade filter to segment the visualizations on this page to a specific result grade.

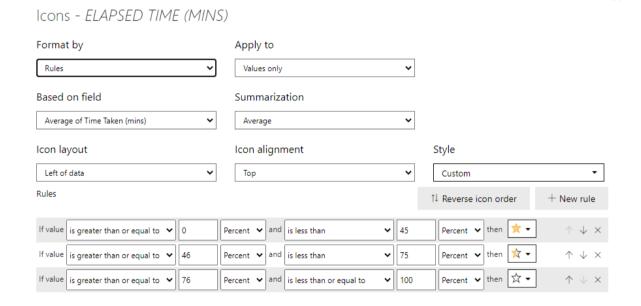




The last scorecard in this report should be helpful for individual or project team analysis (27).

Key statistics include:

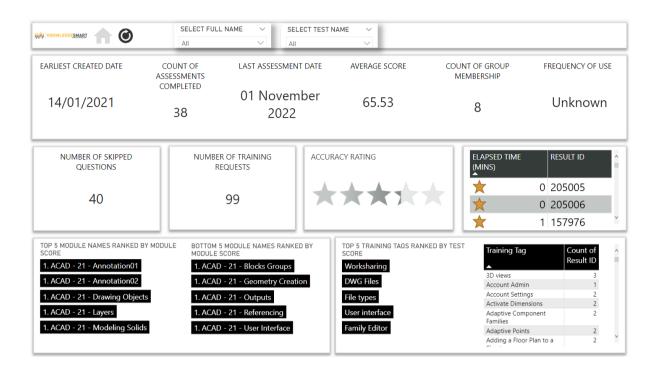
- Count of Assessments completed
- The date a specific user's profile was created
- Last Assessment date
- Frequency of Use (voluntary background information so could be blank if not captured)
- Count of group membership (the number of groups the user belongs to)
- Number of skipped questions
- Score and self-rating per result ID. The self-rating may be blank if not captured during the assessment user journey.
- Accuracy Rating (score compared to the maximum score, which is 100%)
- Work Speed Analysis showing the elapsed time (minutes) per result ID.
 Conditional formatting has been applied to the first column as per the rules below.



If the frequency of use is blank, it means your users did not complete the background questions, or you might have the capture of additional background information de-activated via your interface settings.







The bottom row offers a visualization of module performance (score). Here we can identify the top and bottom 5 module names ranked by module score. Bottom right we can identify the top 5 training tags ranked by test score and to the right of that the count of result IDs per training tag. Use the full name or test name drop-down filters at the top to filter all visualizations.