UNDERSTANDING ADMIN ROLES

Admin Types

KnowledgeSmart allows four levels of permission to be set independently for 'Test and Surveys' and 'Skills'. These Admin Types are shown in the table below.

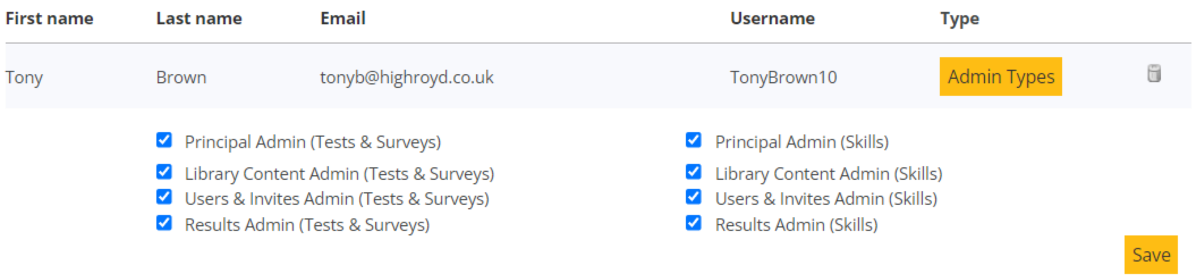
Admin Type	To be used for
Principal Admin	Full access to all KnowledgeSmart functions. Normally limited to a small number of people who control the KnowledgeSmart service for an organisation.
Library Content Admin	Access to the Library and Invites areas. For use by people who are creating custom content for an organisation.
Users and Invites Admin	Access to the Users and Invites areas. Typically used by people who are responsible only for sending out invites. For example, someone in HR sending invites to potential new hires.
Results Admin	Access to the Home Page and the Results area. This Admin Type would be suitable for someone helping with data analysis (i.e. Power BI) and sharing of results.

Setting Admin Types

To set the permissions for individual administrators follow these steps.

Select 'Accounts' from the vertical left-hand menu. This will list your accounts. Select the 'Administrators' icon to list all administrators for an account.

Click on the 'Admin Types' button to show the permission settings for that administrator.



Select the appropriate permissions by clicking on the check boxes. When finished, click on the orange 'Save' button. The next time that person logs in they will have the assigned Admin Type permissions.

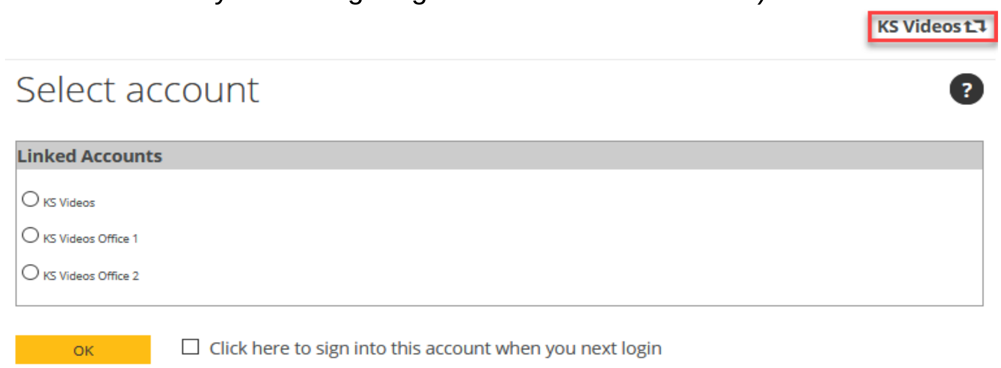
The table below summarizes which areas of the KnowledgeSmart administration portal can be accessed by each Admin Type. The column headings are the main menu items.

Admin Type	HOME	LIBRARY	INVITES	RESULTS	USERS	TEAMS	SETTINGS	ACCOUNTS	HELP	SUPPORT
Principal Admin	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Library Content Admin	N	Y	Y	N	N	N	Y	N	Y	Y
Users and Invites Admin	N	N	Y	N	Y	Y	Y	N	Y	Y
Results Admin	Y	N	N	Y	Y	N	Y	N	Y	Y

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).



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 INVITES HISTORY, 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?

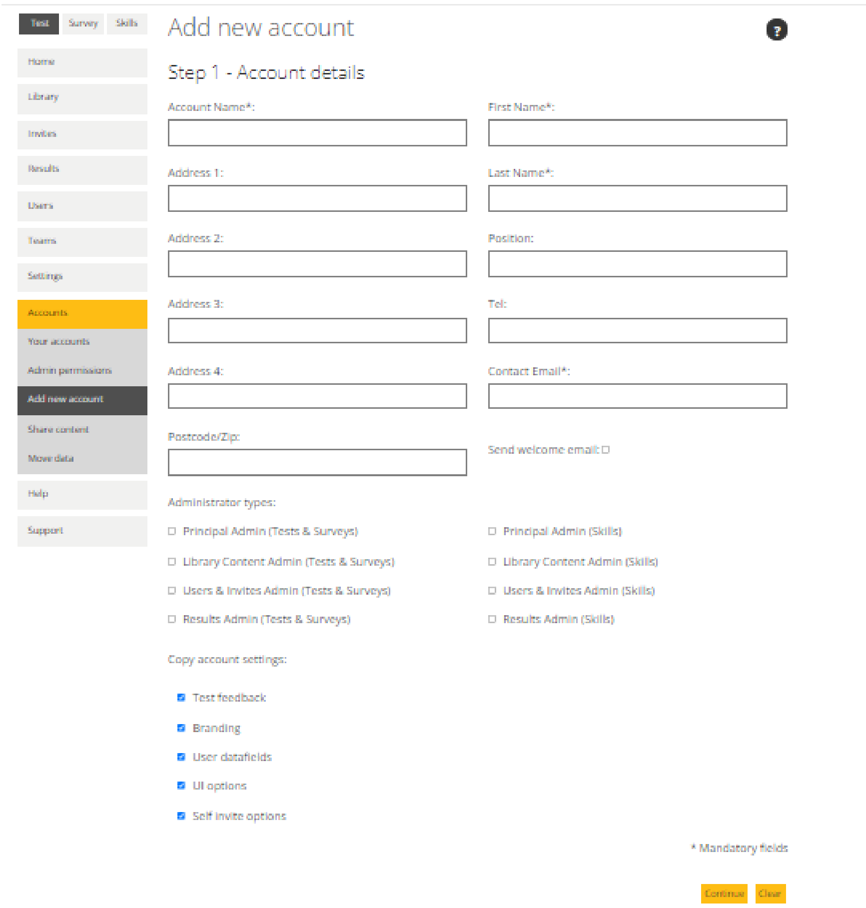
- Assessment Feedback Settings
- Assessment Invite Templates
- User datafields
- Assessment/Survey Content – it is always advisable to let the extended team know when you create a custom assessment or survey, as it might be useful for other teams to use.
- User data (including invites, results and any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

Utilize 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.

When assigning an administrator for the new account remember to set the appropriate 'Admin Type'.

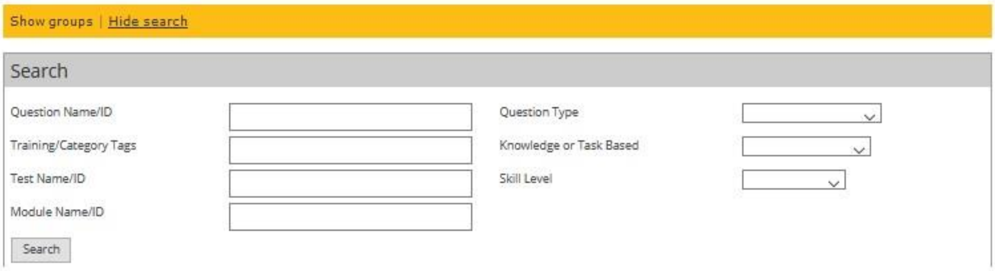


Assessment content customization

- 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 repurposed. 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.

- Utilize 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.
- 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 i.e. John Taylor edited 09102022 or customized for Civil Pilot 2022. 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.
- This export process, along with a provided Power BI template is the same for Tests, Surveys and Skills modes.
- 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.

- To download the Power BI template, select the gray button as shown above. Each template is pre-populated with example data to allow you to explore the sample visualizations.

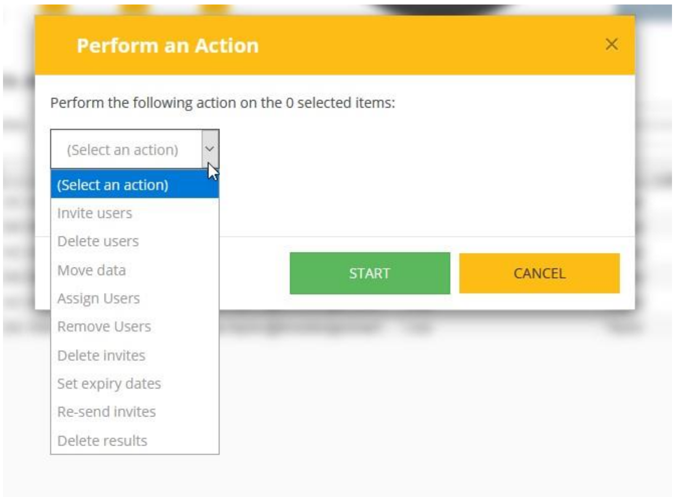
- Template customizations are possible based on individual project scope.

  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.

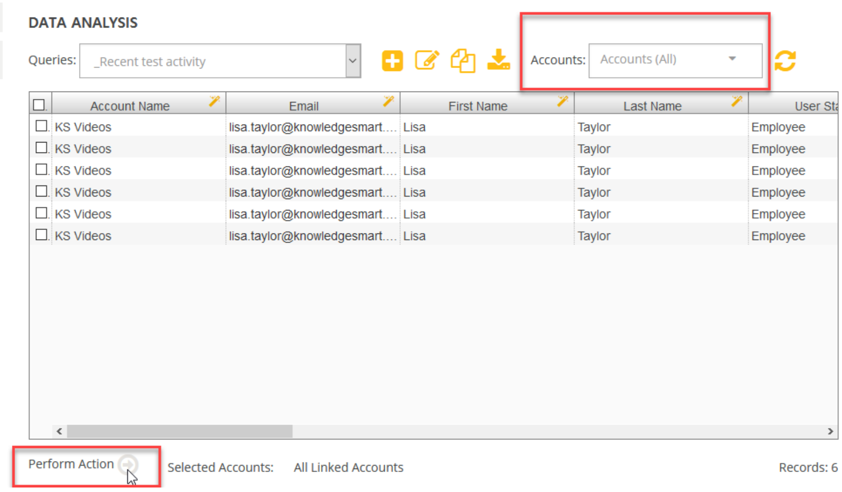
- There are some in-platform data visualizations from and more granular data exports underneath the RESULTS menu.

The KnowledgeSmart data analysis tool (Admin Home menu – Test mode only)

- 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 personalize 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.



User datafields

- In order for there to be maximum business value regarding analysis of KS users, invites and results it is best practice to use consistent user datafields across parent and linked accounts.
- Certain user datafields could utilize 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 filter and group your data. It is critical that administrators do not skip this step and import user data without these columns 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 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 utilized to create dynamic groups across all linked accounts.

*** 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 analyze this/use them as additional filters inside the KnowledgeSmart Power BI template with your other KS data.*

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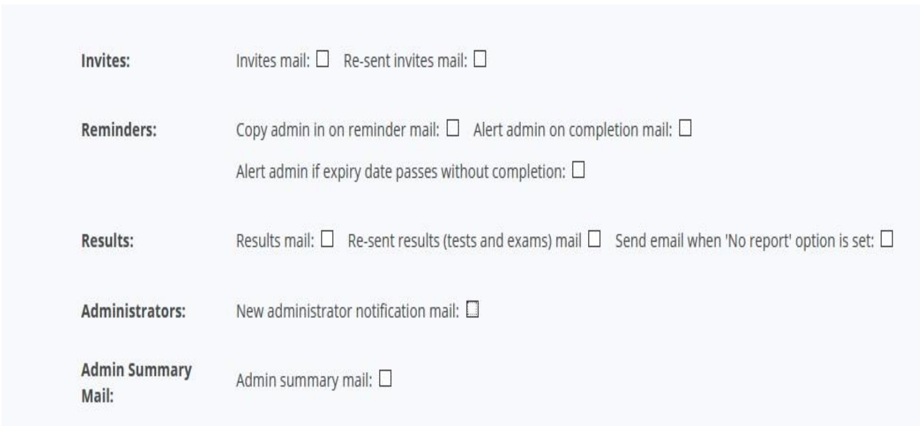
Importing user data

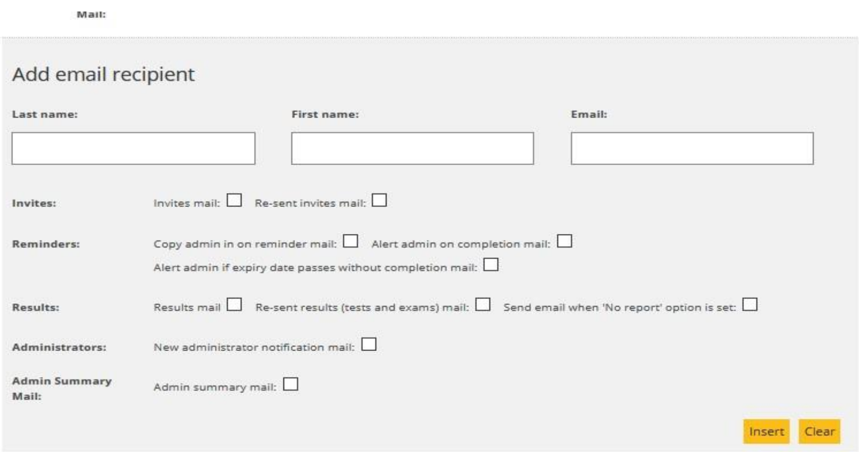
- This is critical to successful implementation of this tool.
- KnowledgeSmart provides a template which shows you in what format the data needs to be presented, in order for it to be imported correctly.
- You can import user data from the ‘Manage user data’ sub-menu or during the invite process. Both 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. Select 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.



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



Passwords

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

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