



# PARTNER MANAGER GUIDE

REPORTS







## WHAT'S COVERED

# OVERVIEW

- Reporting Intro .....P 3-4
- Content Reports.....P 6-10
- Pre-Built Reports.....P 11-15
- Custom Reports.....P 16-27
- Troubleshooting .....P 28



# What Data is Available to Me?

Our platform offers powerful yet intuitive reporting capabilities. We provide a variety of methods for you to capture the insights you need; whether it's a quick, high-level look at metrics or a deep dive into data details.

## Here's a quick overview of what's available:

### Reports/Dashboards *(Ready-Made)*

- Client Engagement
- Content Usage
- Learner Usage
- Onboarding Responses Log

### Content Reports

- Overview
- Learners
- Competencies

### Custom Reports via Create

- Virtually limitless report creation capabilities
- Start with a question and create reports from scratch to fulfill your reporting needs

# Terms to Know

Before diving into reporting, it's important to share key distinctions surrounding two terms you'll frequently throughout the admin side of our platform. While this understandably may create some initial confusion, it's important to know that terms are structured this way for broader use and application of content in the back-end of the platform.

## Course

You are likely familiar with the term Framework Homebuyer course so it's natural to think of that as a course.

However, in the admin side of our platform, a course is what we refer to as a lesson or activity.

To simplify:  
Framework Lesson = Course in admin

## Learning Path

A learning path is a collection of courses (or what we refer to externally as lessons).

The Framework Homebuyer course is what we refer to in our learning management system as a Learning Path.

To simplify:  
Framework Homebuyer Education  
Course = Learning Path in admin



# Before you Start

## Compatible Browsers

Reporting performs best in Google Chrome and Firefox.

Please ensure you are not using incognito/private mode.

## Report Use

Data generated from reports within the learning management system (LMS) must be used in accordance with Section 13 of your agreement with Framework alongside [Framework's Terms of Use](#) and [Privacy Policy](#).

# Content Reports

Content Reports equip managers with the ability to attain a high-level look into data specific to the the English and Spanish versions of the Framework Homebuyer Education course (learning paths).

**From each learning path, you'll be able to view pre-built reports across two key focus areas:**

- **Overview** – Get a high-level view of how users are engaging with the course within your cohort. Includes metrics on total certificates earned, average time spent, learner status breakdowns, and more.
- **Learners** – See a detailed list of users and their respective progress % and status (started, not-started, in progress) within a learning path. Additionally, view user status in specific lessons (courses) within the learning path.

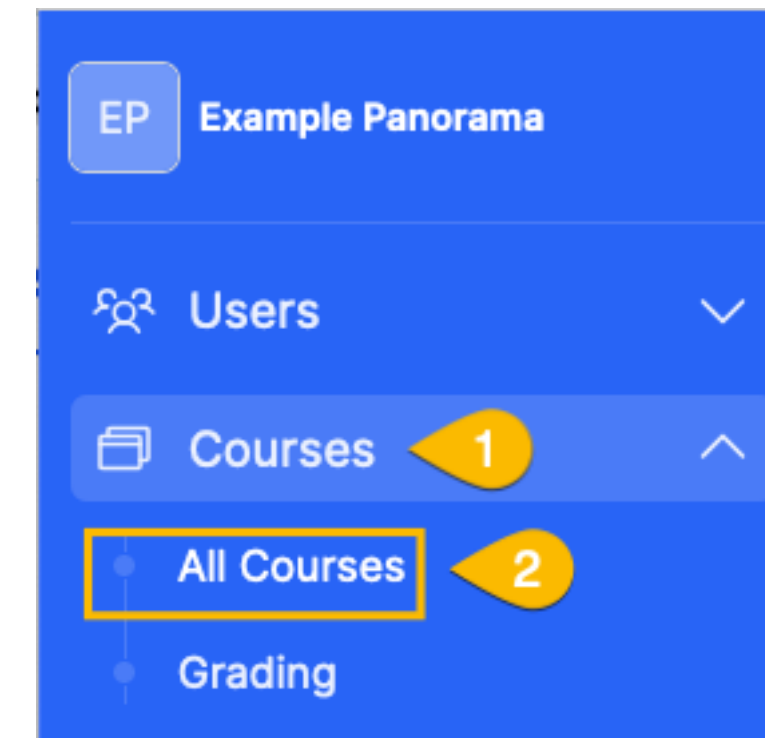


**Note:** You will also see a tab for *Competencies*, but these reports will be blank since the Framework Homebuyer Education course does not utilize this function.

# Viewing Content Reports

To view a content report:

1. Select “Courses” from the left menu
2. Next, select “All Courses”
3. Locate the learning path (Framework Homebuyer Ed Course) you want to view data on
4. Click the three stacked dots on the far right of the learning path name
5. Select reporting



Editing Client: Example Panorama / All Client Content (2)

Search by Title

Title	Type	Created	Updated ↑	Tags	
Sandbox FW HBE Course	Learning Path	12/29/2023	12/29/2023	HBE English + 2	⋮
Sandbox FW HBE Course + Advising	Learning Path	12/29/2023	12/29/2023	HBE English + 2	⋮

Showing 1-2 of 2 items

Preview

Detail Page

Reporting



# Viewing Content Reports

Let's start with the Overview report

- 1. To start, you can adjust the date range to cover the time period you'd like to report on
- 2. Leave all other fields as they are.
- 3. You can now review the data for your specified time period!

Reports: Framework Homebuyer Education Course

Overview   Learners   Competencies

## Overview

just now

Date

is in the last 30 days

Learning Path \*

37a09553-0c2d-4f00-8489-45778e

Role Type

is Learner

Client ID \*

92080eec-8729-4f1d-aa20-97b925e

License Name

is any value

0:01:42

Average Time Spent

1

Certificates Earned

0

Completed Assignments

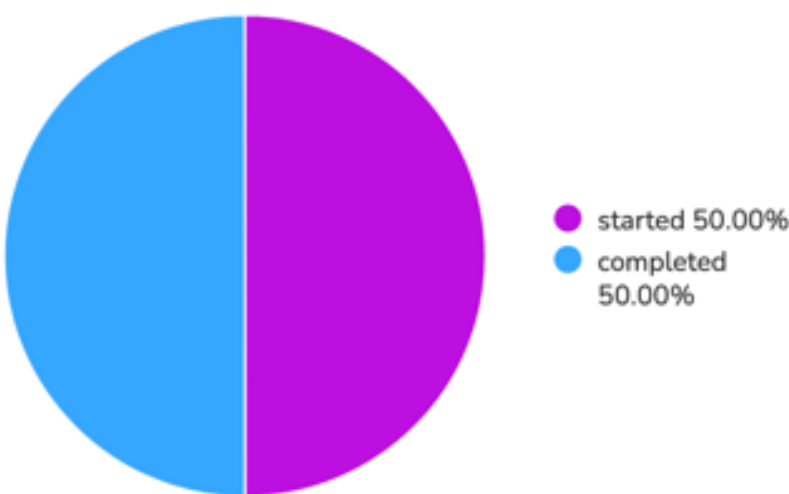
14

Course Completions

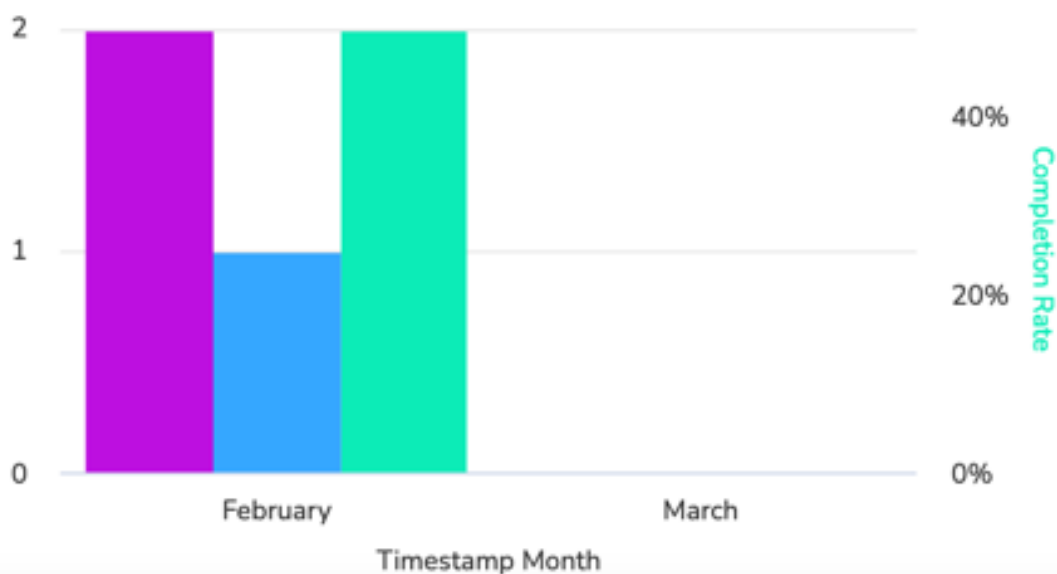
### Milestone Engagement

	Milestone	Learners Comple...	Learners Not Co...
1	Framework Homebuy...	2	2
2	Lesson 2: Getting Star...	0	4

### Learner Count By Status



### Completion Rate



### Enrollment Log

	Email	Type	Source	Timestamp
1	test@test08.com	revoked_access	manager_revok...	2023-02-23
2	test@test08.com	enrollment	learning_path...	2023-02-23
3		enrollment	learning_path...	2023-02-23
4		revoked_access	manager_revok...	2023-02-14

## Date filtering options

Date

is in the last 30 days

Learning Path

37a09553

is in the last 30 days

is in the last

is on the day

is in range

is before

is on or after

is in the year

is in the month

is this

is next

is previous

is

is null

is any time

is not null



# Viewing Content Reports

Now let's view the Learners report

- 1. Just as you did for the content report, you can adjust the date range to cover the time period you'd like to report on
- 2. You can also filter by the learner's email, milestone, or content title.
- 3. Be sure to leave all other filters set as they are.
- 4. You can now review the data for your specified time period!

OverviewLearnersCompetencies

Learners

Last Action Date

is in the last 30 days

Learning Path \*

is 37a09553-0c2d-4f00-8489-45778ed79...

Learner Email

is any value

Role Type

is Learner

Milestone

is any value

Content Title

is any value

Client ID \*

92080eec-8729-4f1d-aa20-97b925e

License Name

is any value

Learning Path Status

	Email	Name	Last Acti...	Last Acti...	Last ...	Completed Courses	Learning Path Courses	% Progress
1	test@test10.c...	Test Test	certificate_gra...	learning_path...	2023-03-06 ...	7	7	100%
2		Cass Testing ...	status_change	learning_path...	2023-03-02 ...	7	7	100%
3	test@test08.c...	testttttt testting	revoked_access	manager_revo...	2023-02-23 ...	0	7	0
4			revoked_access	manager_revo...	2023-02-14 ...	0	7	0

Content Status

	Email	Name	Milestone	Content	Content ...	Last Action Type, Source	Last...	Status
1	test@test10....	Test Test	Framework ...	Lesson 2: Ge...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
2	test@test10....	Test Test	Framework ...	Lesson 1: Ar...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
3	test@test10....	Test Test	Framework ...	Lesson 4: Fin...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
4	test@test10....	Test Test	Framework ...	Lesson 3: Ho...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
5	test@test10....	Test Test	Framework ...	Lesson 5: Ma...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
6	test@test10....	Test Test	Framework ...	Lesson 6: CL...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
7	test@test10....	Test Test	Framework ...	Lesson 7: Be...	Course	status_change, manager_change_completed	2023-03-06 ...	completed
8		Cass Testing...	Framework ...	Lesson 2: Ge...	Course	status_change, manager_change_completed	2023-03-02 ...	completed
9		Cass Testing...	Framework ...	Lesson 1: Ar...	Course	status_change, manager_change_completed	2023-03-02 ...	completed
10		Cass Testing...	Framework ...	Lesson 4: Fin...	Course	status_change, manager_change_completed	2023-03-02 ...	completed
11		Cass Testing...	Framework ...	Lesson 3: Ho...	Course	status_change, manager_change_completed	2023-03-02 ...	completed
12		Cass Testing...	Framework ...	Lesson 5: Ma...	Course	status_change, manager_change_completed	2023-03-02 ...	completed
13		Cass Testing...	Framework ...	Lesson 6: CL...	Course	status_change, manager_change_completed	2023-03-02 ...	completed
14		Cass Testing...	Framework ...	Lesson 7: Be...	Course	status_change, manager_change_completed	2023-03-02 ...	completed



**Pro Tip**  
You can click on any header to sort that column by ascending or descending order

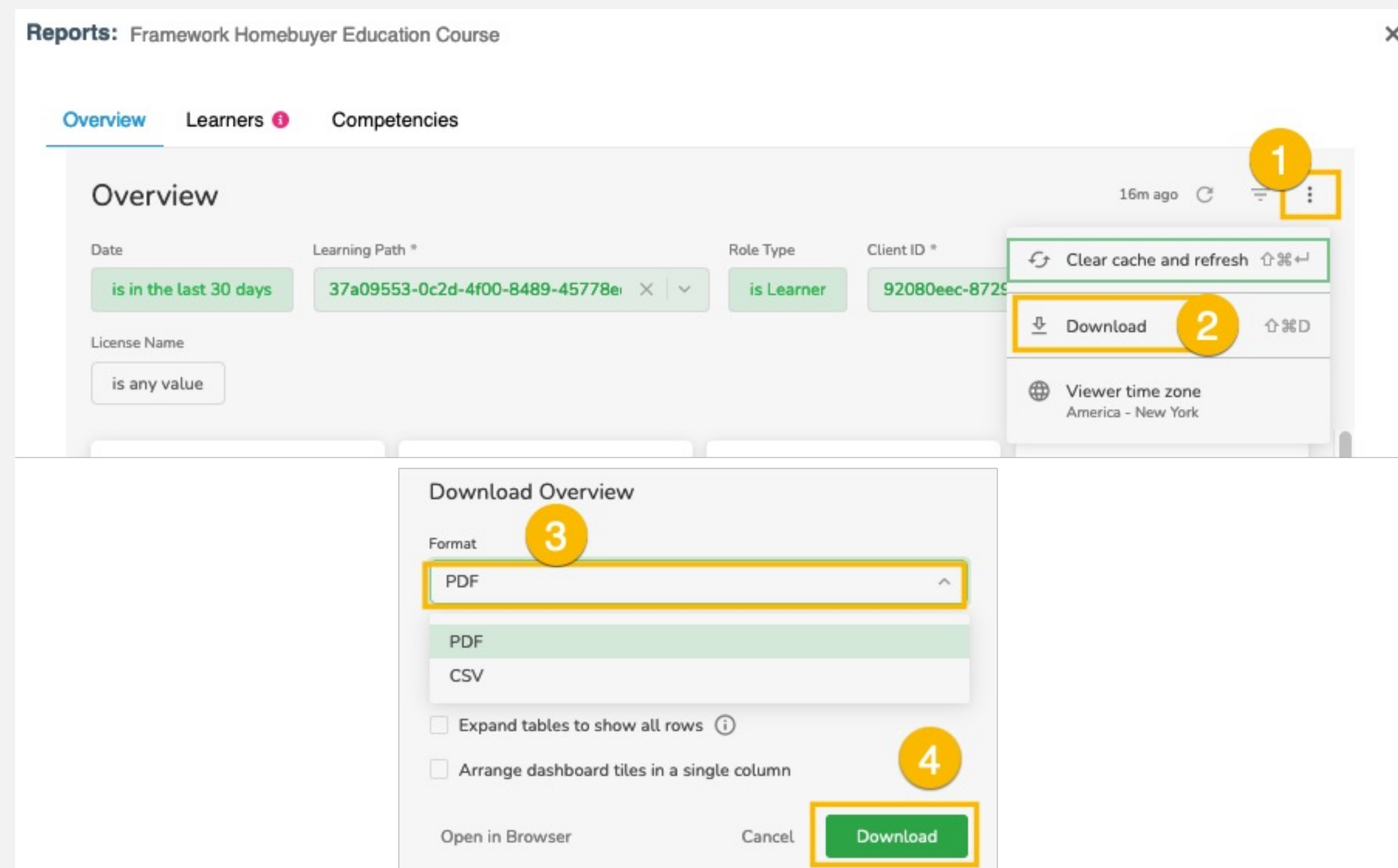


# Downloading Content Reports

You can download either of these reports in their entirety or choose to download a specific element.

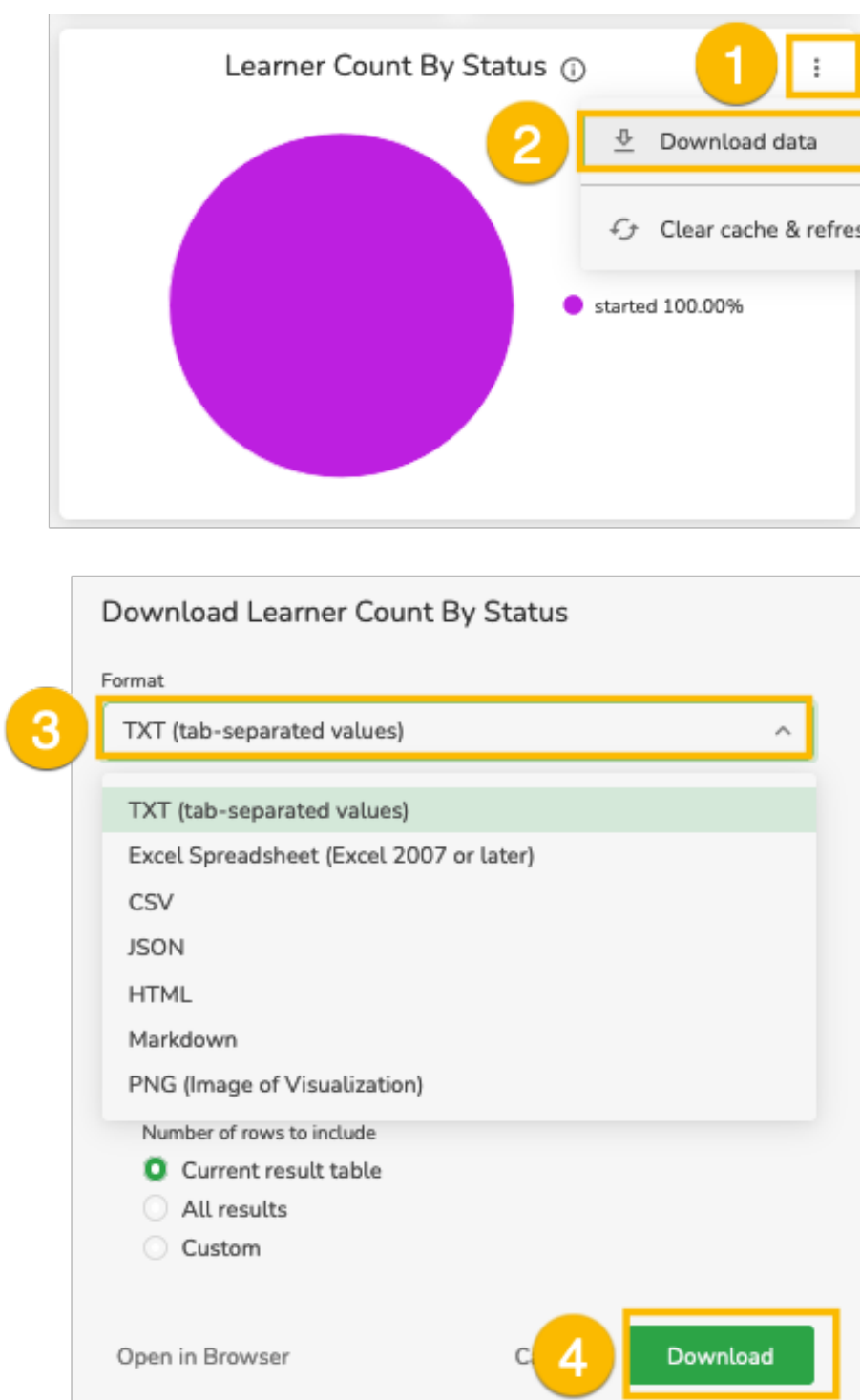
## Download Entire Report

1. Click on the three stacked dots in the right corner
2. Selecting download
3. Choosing either CSV or PDF



## Download Specific Widget or Dataset

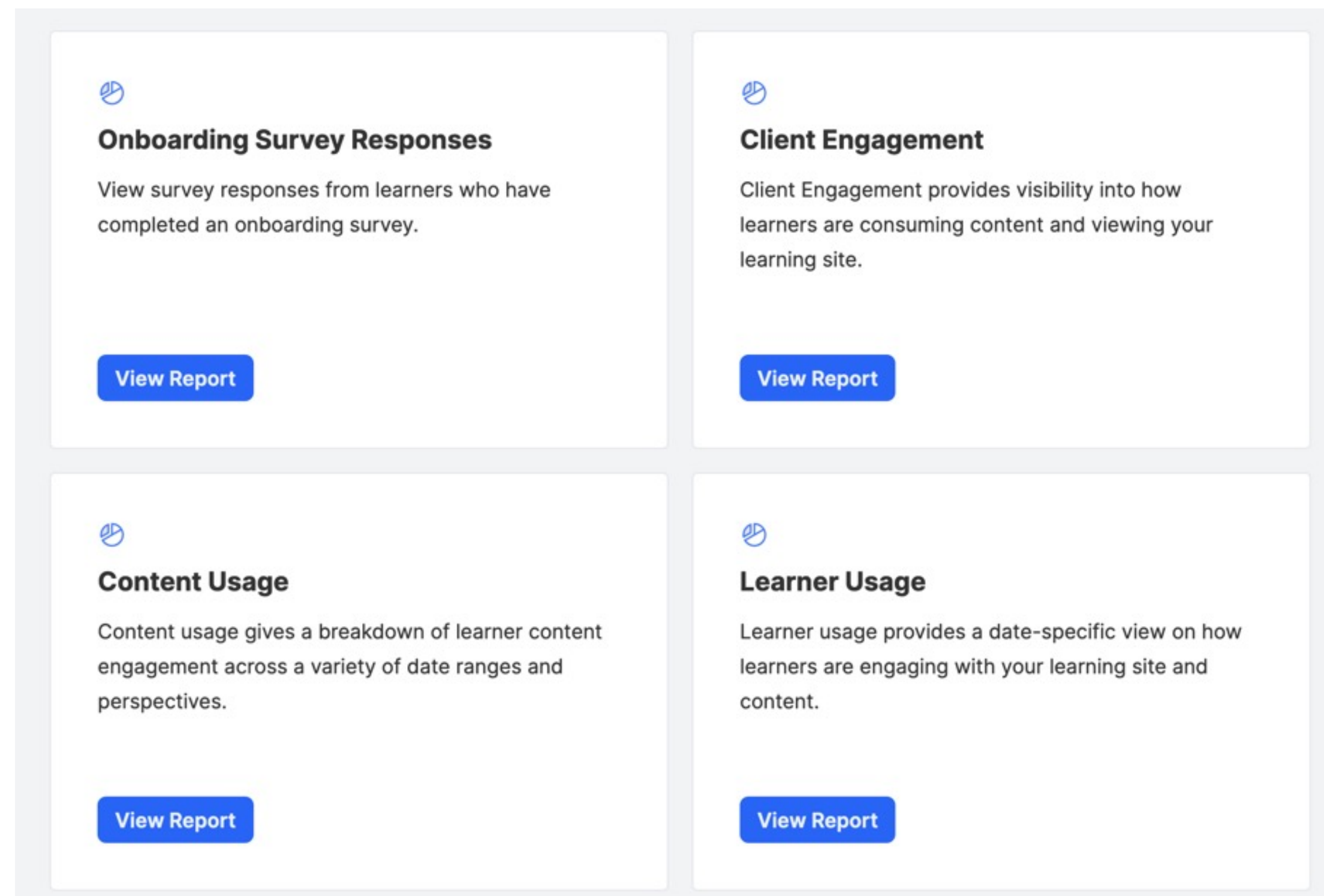
1. Locate the widget/dataset you'd like to download
2. Click on the three stacked dots in the right corner
3. Selecting download
4. Choosing either CSV or PDF





# Pre-Built Reports

Under “Reports” you can find are pre-built reports containing multiple datasets that span learner engagement, content usage, learner usage, and survey responses.

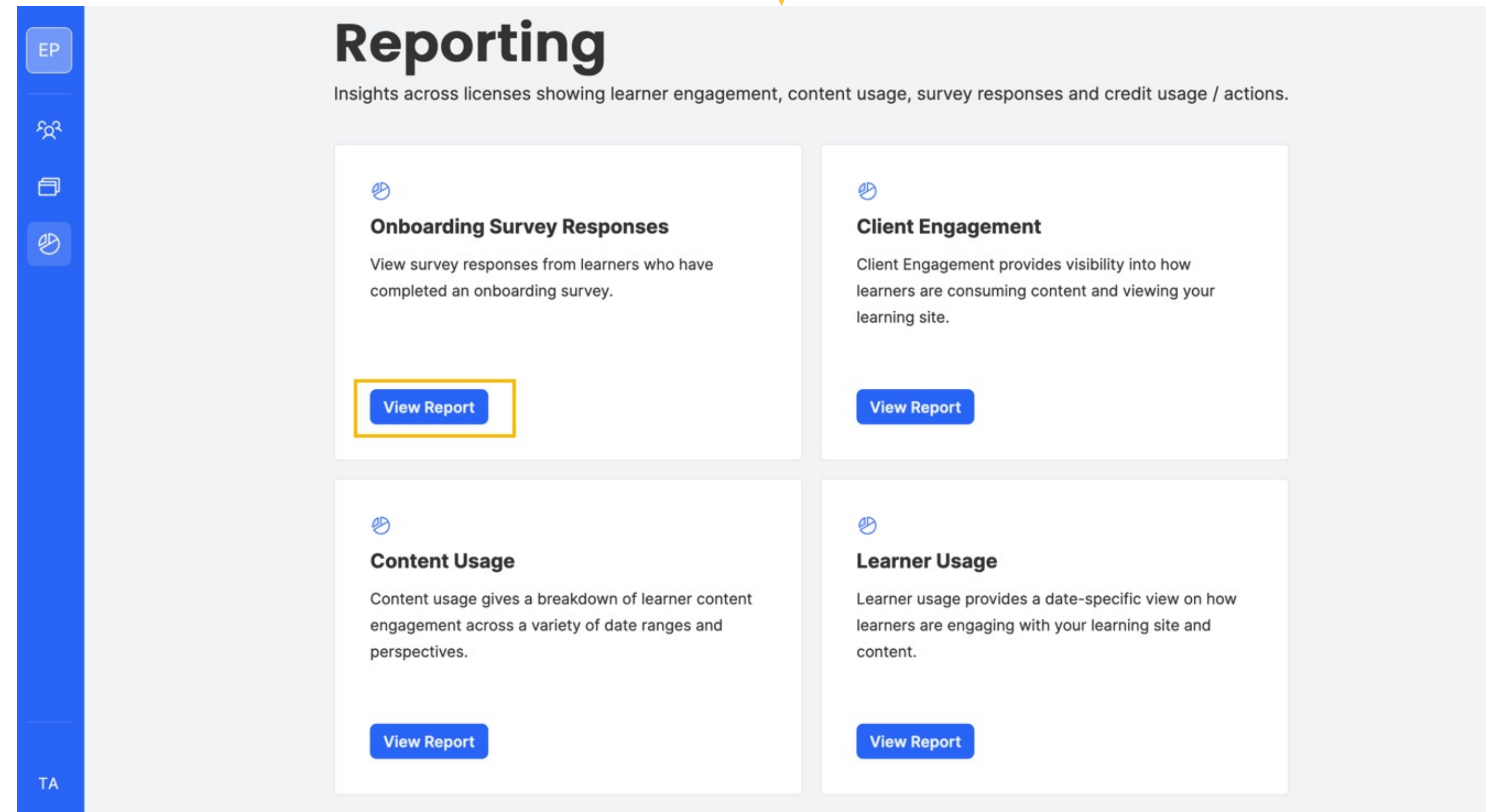
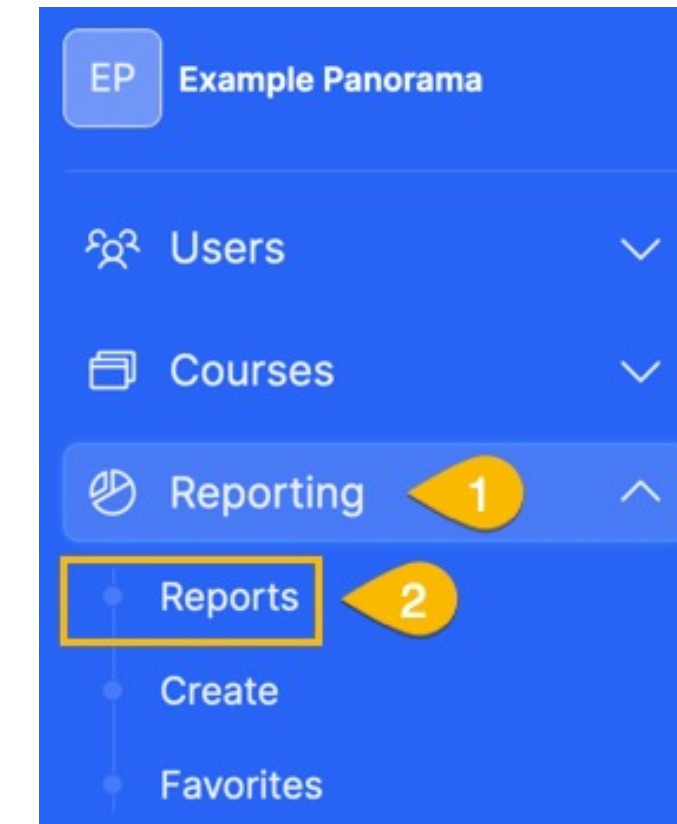


Much like content reports, these reports contain the ability to filter by date and download

# Viewing Pre-Built Reports

To view a content report:

1. From the left menu, select Reporting
2. Next, select reports
3. On the page that appears, select the report you would like to view

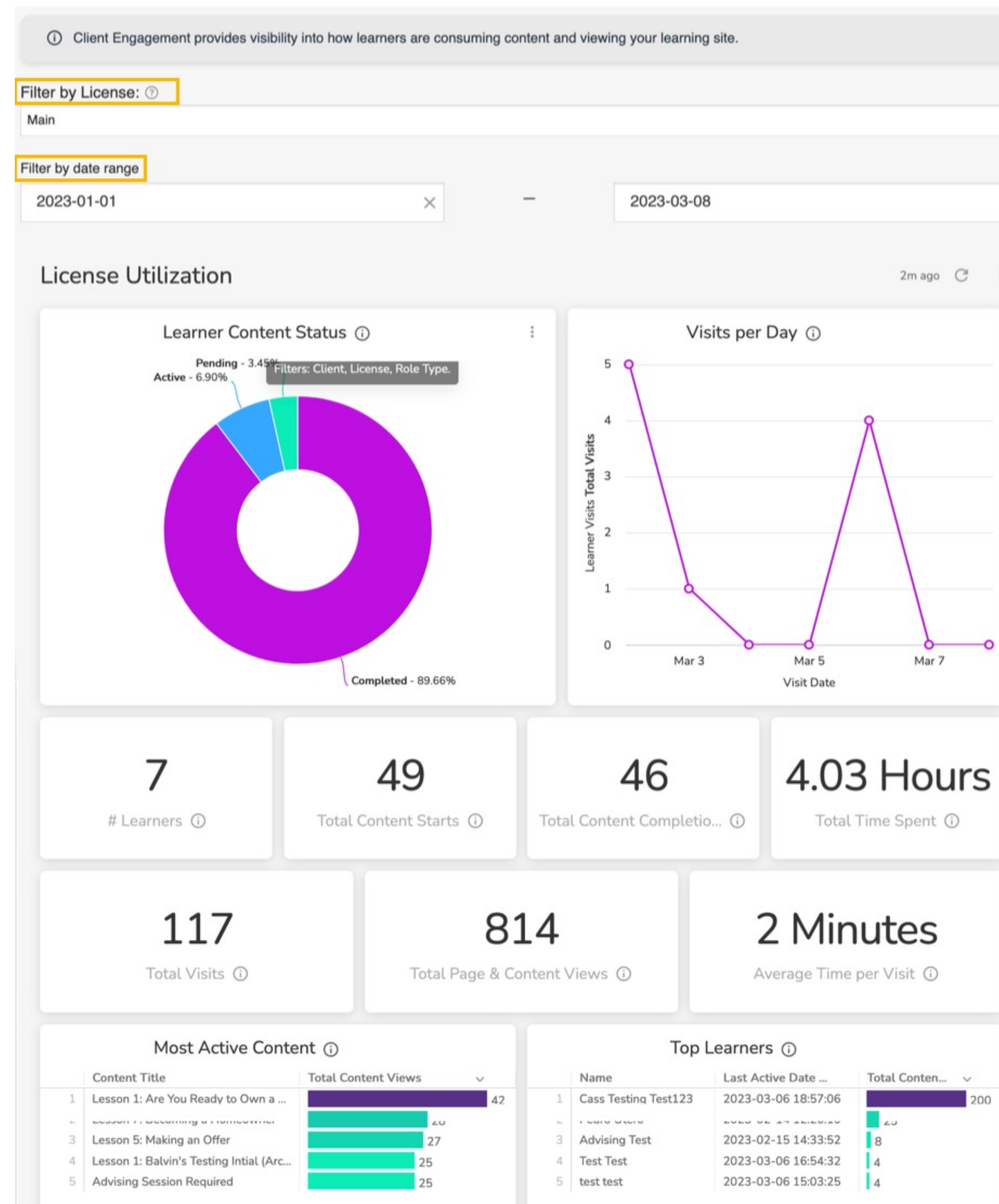




# Viewing Pre-Built Reports

## To Filter a Report:

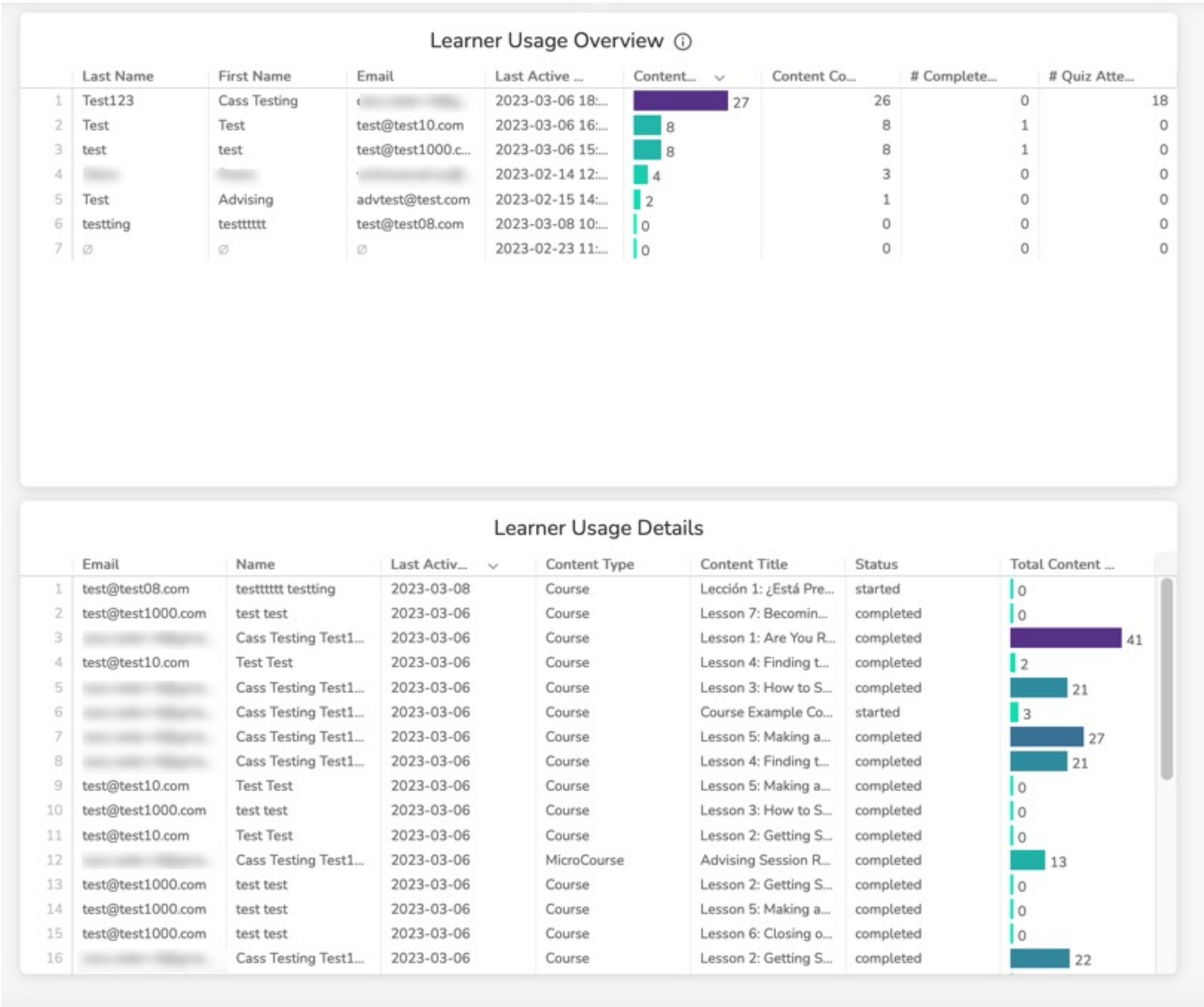
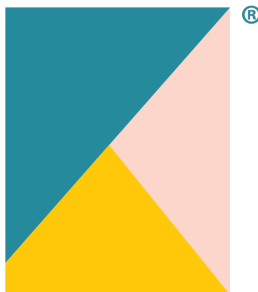
1. Within your selected report go to [Filter by License] and select “main”
2. From the date range section, select your start date and end dates by clicking into each field and using the calendar picker
3. The dashboard will then populate to show the data within your specified date range



# Viewing Pre-Built Reports

To Sort Data:

Wherever data tables exist, you can click on any header to sort that column by ascending or descending order.





# Downloading Pre-Built Reports

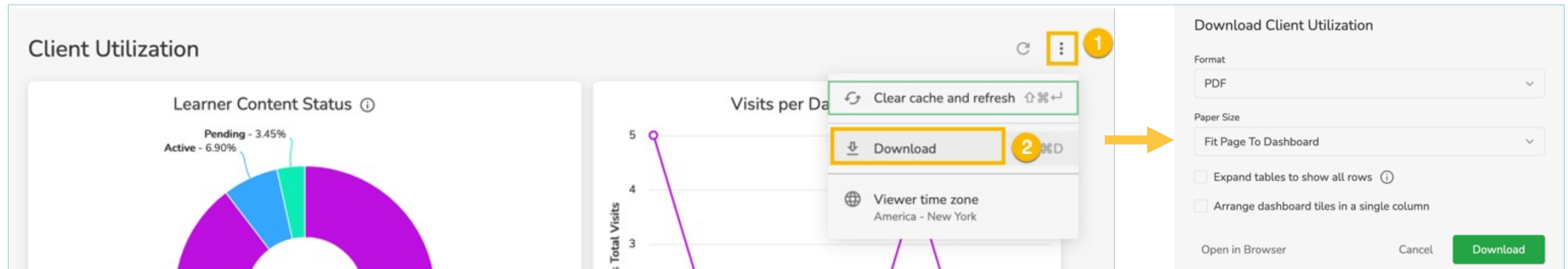
To download the data from any pre-built report as a PDF or a .CSV file:

1. Locate the stacked dots icon
2. Select download
3. Choose your download preferences

## PRO-TIP

You can download individual widgets or the entire report.

The file will begin processing in another window and may take awhile depending on how much data is contained in the report. When your document is ready the window should notify you of success and where to find your report.



**Note:** If you choose CSV, the file will likely download as a zip file, which you can then unzip. Within this folder you should find a .CSV file for each element on the dashboard which you can open in your preferred spreadsheet application to sort, organize, and manipulate as you prefer.



# Creating Custom Reports

The Create portion under Reporting allows you to create custom reports and tweak base configurations to fit your specific reporting needs.

The image shows a two-part interface. On the left is a blue sidebar for 'Example Panorama' with a menu containing 'Users', 'Courses', 'Reporting', 'Reports', 'Create', and 'Favorites'. The 'Reporting' item is highlighted with a yellow callout '1', and the 'Create' item is highlighted with a yellow callout '2' and a yellow box. An orange arrow points from the 'Create' item to the main content area on the right. The main area is titled 'Explore' and has tabs for 'Start Building', 'Looks', and 'Dashboards'. Under 'Start Building', there is a section 'Where to start' with instructions. Below this are two categories of report questions: 'Learners' and 'Learner Content & Progress'. The 'Learners' category includes questions like 'Who are my learners?', 'What are my learners' details?', 'How many learners do I have?', and 'Where are my learners?'. The 'Learner Content & Progress' category includes questions like 'What certificates are being earned?', 'What external certificates are being uploaded?', 'How are learners performing in assessments?', 'How are learners performing in competency assessments?', 'How many learners have started content and not completed it?', and 'What % complete are my learners with a particular item?'. The sidebar also shows 'EP' at the top and 'TA' at the bottom.



# Creating Custom Reports

Clicking create will take you to the **Start Building** tab.

*Here, you can choose from a list of questions/prompts sorted by category to help you find the right base configuration to build from.*

1. To start, choose the question that most suits your curiosity or reporting needs. There are countless options to choose from.

Learners

Who are my learners?

What are my learners' details?

How many learners do I have?

Where are my learners?

Learner Content & Progress

What certificates are being earned?

What external certificates are being uploaded?

How are learners performing in assessments?

How are learners performing in competency assessments?

How many learners have started content and not completed it?

What % complete are my learners with a particular item?

What is the average completion progress on a content item?

What is the average % complete compared across all content types?

Content Actions

What is a learners actions within a particular content item?

What course certificates have been granted?

How are learners getting their access revoked from content?

How are learners earning certificates?

Learning Path Actions

What are a learners' actions within a particular learning path?

How are learners getting their access revoked from learning paths?

What learning path certificates have been granted?

Transactions

How much non-recurring revenue have I earned?

What are all my one-time transactions?

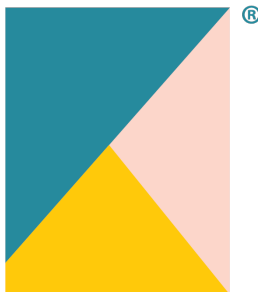
Subscription Transactions

How much recurring revenue have I earned?

What are all my recurring transactions?



# Creating Custom Reports



2. Let’s say I want to understand purchases within a specific timeframe.

Since the course is a one-time fee for users, I might decide to choose “*What are my one-time transactions?*”

3. When a prompt is selected, a page will open where you can begin building out your report.

Transactions

How much non-recurring revenue have I earned?

What are all my one-time transactions?

Explore

0 row · 0.9s · just now · America - New York

Time Zone

Run

Transactions (Panorama)

Search

All FieldsIn Use

A La Carte Collection Details

Collection (Discount Group) Details

Content Details

Learner Details

Learner Licenses

Learning Path Details

License Details

Meetings Summary

Panorama Details

Product Details

Session Custom Fields

Site Details

Subscription Details

Transactions

1

10

Filters (5)

Learner Details Email is any value

Transactions Item Type Translated is any value

Transactions Successful Payment (Yes / No) is Yes

Transactions Timestamp

Visualization

Table (Legacy)

Edit

Email

Title

Item Type Translated

Amount Charged

Amount Discounted

Amount Disputed

Amount Net

Affiliate

Coupon Code

Timestamp Time

No Results



# Creating Custom Reports



4. We recommend starting by looking at the filters currently in use. Click on the filter line at the top to open and view current filters. The image on the right shows the current filters.
5. For this example, I might decide I want to see transactions from January 2 until a specified date. So, I would click on the Transactions Timestamp Time and set that date range
6. If I am satisfied with my filters, I can go ahead and click **Run** in the top right to see what kind of results I get.

Time Zone: America - New York

Run

Filters (5)

4

6

Learner Details Email

is equal to

Transactions Item Type Translated

is equal to

Transactions Successful Payment (Yes / No)

Required

is

Yes

5

Transactions Timestamp Time

is in range

2023-01-02

at 04 : 39 am

until (before)

2023-03-09

at 04 : 39 am

# Creating Custom Reports

7. Once the report has run, I should be able to scroll down and see the data filtered to my specifications.

Explore

4 rows · from cache · 7m ago · America - New York

Run

Transactions (Panorama)

Search

All FieldsIn Use

A La Carte Collection Details

Collection (Discount Group) Details

Content Details

Learner Details

Learner Licenses

Learning Path Details

License Details

Meetings Summary

Panorama Details

Product Details

Session Custom Fields

Site Details

Subscription Details

Transactions

Filters (5)

Custom Filter

Learner Details Email

is equal to

Transactions Item Type Translated

is equal to

Transactions Successful Payment (Yes / No)

Required

is

Yes

Transactions Timestamp Time

is in range

2023-01-02

at

04

:

39

am

until (before)

2023-03-09

at

04

:

39

am

Visualization

Table (Legacy)

Edit

	Email	Title	Item Type Translated	Amount Charged	Amount Discounted	Amount Disputed	Amount Net	Affiliate	Coupon Code	Timestamp Time ↓
1	test@test10.com	Framework Homebuyer Education Course	Learning Path	\$0.00	\$2.00	\$0.00	\$0.00	cass-clone-test2	CKTESTING2023	2023-02-23 12:26:10
2	test@test08.com	Framework Homebuyer Education Course	Learning Path	\$2.00	\$0.00	\$0.00	\$2.00	cass-clone-test2		2023-02-23 11:29:50
3		Lesson 1: Balvin's Testing Intial (Archived)	Content Item	\$1.05	\$0.00	\$0.00	-\$1.05			2023-02-14 16:14:37
4		Course Example Copy	Content Item	\$0.00	\$1.00	\$0.00	\$0.00		CASSTEST	2023-01-23 14:50:06



# Creating Custom Reports

## Adding Field Filters

1. To start, review which fields are in use for filtering.

- To do this, you can click the “In Use” button under the search box on the left.
- Any field that is currently in use for filtering will show a green filter icon like this to the right.
- You can also click on the ▼ icon next to “Filters” in the black ribbon on the right of the page to see what fields are in use and how they are being filtered.

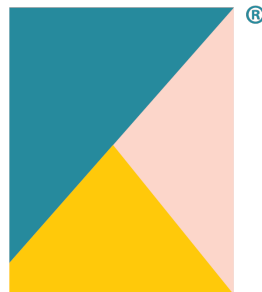
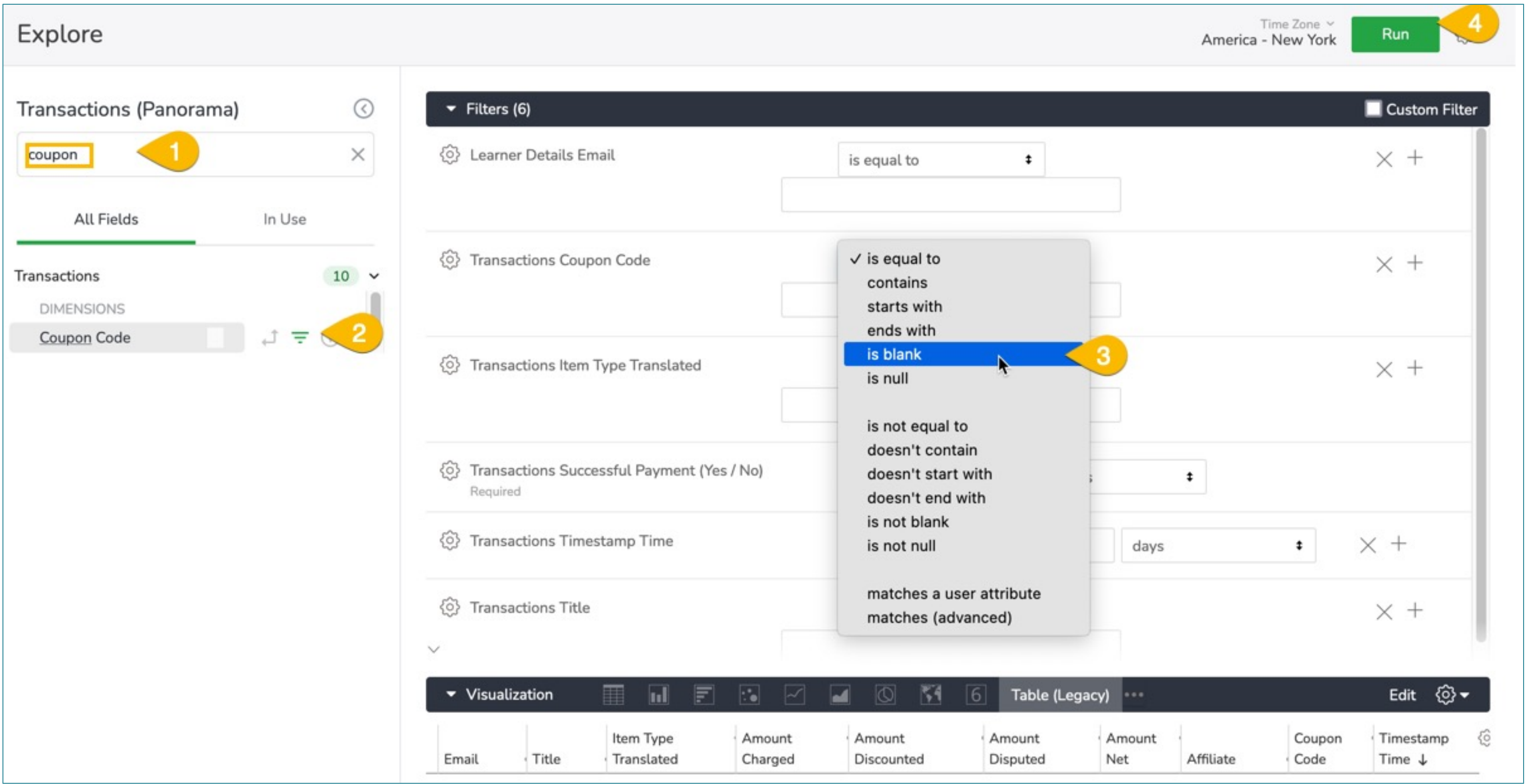
2. If you know what you are looking for, you can use the search field found on the left side of the page. Alternatively, you can select “all fields” and scroll through to see all available data sets and their associated fields. To add the filter, click on the funnel icon so that it turns green.

3. Once you’ve added the fields you wish to use to filter, go to the filters section on the right update the filter parameters you wish to include. Then run or continue editing.

## Example:

Let’s say I want to see purchases that did not include a coupon.

1. I can search for “coupon” in the field to the left
2. Next, I can click on the funnel icon to add that as a filter. It should turn green.
3. From there, I can locate that field in the filter section on the right and choose “is blank”
4. Now you can run your report or continue building it



# Creating Custom Reports



## Removing Field Filters

- From the box on the left, go to “In Use” and click the green filter icon next to any filter. You can then run your report or continue building it.
- You can also click X next to any field found under the “filters” ribbon.

### Option A

Explore

Transactions (Panorama) ⏮

coupon ×

All Fields In Use

Learner Details

Email ⬅ ➡ ⚙ ⓘ

Transactions

Affiliate ⬅ ➡ ⚙ ⓘ

Amount Charged ⬅ ➡ ⚙ ⓘ

Amount Discounted ⬅ ➡ ⚙ ⓘ

Amount Disputed ⬅ ➡ ⚙ ⓘ

Amount Net ⬅ ➡ ⚙ ⓘ

Coupon Code ⬅ ➡ ⚙ ⓘ

Item Type Translated ⬅ ➡ ⚙ ⓘ

Successful Payment (Ye... ⬅ ➡ ⚙ ⓘ

Time • Timestamp Date ⬅ ➡ ⚙ ⓘ

Title ⬅ ➡ ⚙ ⓘ

Filter by field

Clear all Clear fields, keep filters

### Option B

Filters (6) Custom Filter

Learner Details Email

is equal to × +

Transactions Coupon Code

is equal to × +

Transactions Item Type Translated

is equal to × +

Transactions Successful Payment (Yes / No)

Required

is + Yes +

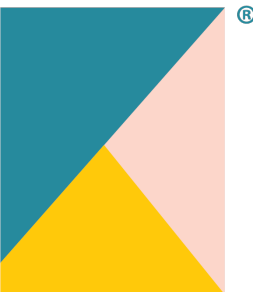
Transactions Timestamp Time

Visualization Table (Legacy) Edit ⚙

Email	Title	Item Type Translated	Amount Charged	Amount Discounted	Amount Disputed	Amount Net	Affiliate	Coupon Code	Timestamp Time



# Creating Custom Reports



## Adding Fields

Just as you searched for fields to filter on, you can search for fields to include in your report. You can also click through the “all fields” list to see available options

1. Once you find a field you’d like to include, simply click on that field’s name. The background color should change from white to gray.
2. A preview will show under the visualization section. In the very bottom section (where the fields show with gearwheel icons) You can click and drag this column to wherever you would like.
3. When everything looks good, you can run the report.
4. To remove a field, go to the “In Use” tab on the left side of the page and click the field you wish to remove. This should change the background color from white to gray.

Explore

America - New York

Run

Transactions (Panorama)

learner

All Fields

In Use

Learner Details

DIMENSIONS

Account Disabled? (Yes / No)

Address 1

Address 2

City

Country

Email

External Customer ID

First Name

ID

Joined Date Date

Last Active Date Date

Last Name

Name

Panorama ID

Ref 1

Ref 10

Ref 2

Ref 3

Ref 4

Ref 5

Ref 6

Ref 7

Ref 8

Ref 9

Role

Filters (6)

Transactions Item Type Translated

is equal to

Transactions Successful Payment (Yes / No)

is

Yes

Transactions Timestamp Time

Visualization

Table (Legacy)

Email	Title	Item Type Translated	Amount Charged	Amount Discounted	Amount Disputed	Amount Net	Affiliate	Coupon Code	Timestamp Time
1 test@test08.com	Framework Homebuyer Education Course	Learning Path	\$2.00	\$0.00	\$0.00	\$2.00	cass-clone-test2		2023-02-23 11:29:50
2	Lesson 1: Balvin's Testing Initial (Archived)	Content Item	\$1.05	\$0.00	\$0.00	-\$1.05			2023-02-14 16:14:37

Data

Results

Row Limit 500

Totals

Subtotals

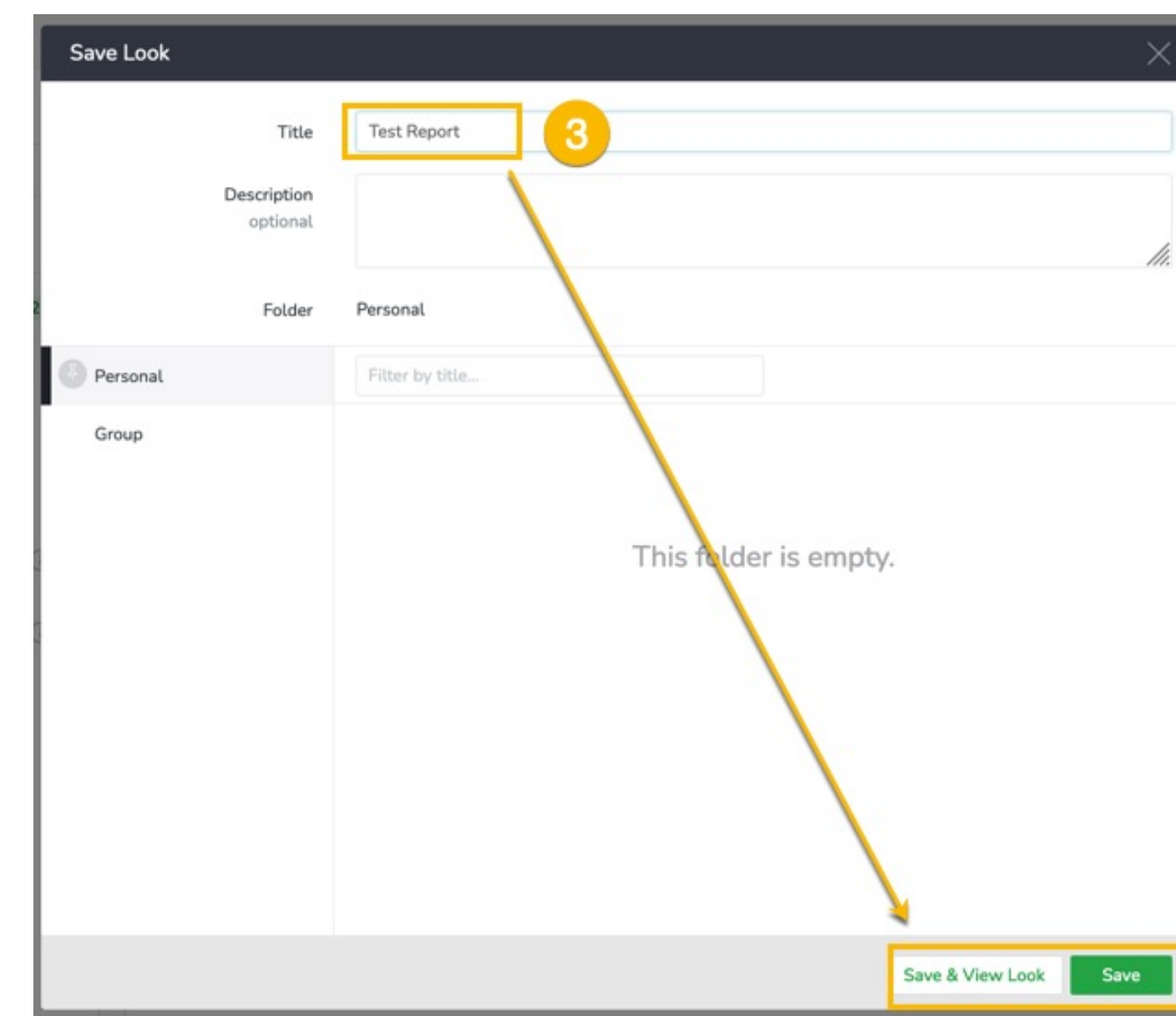
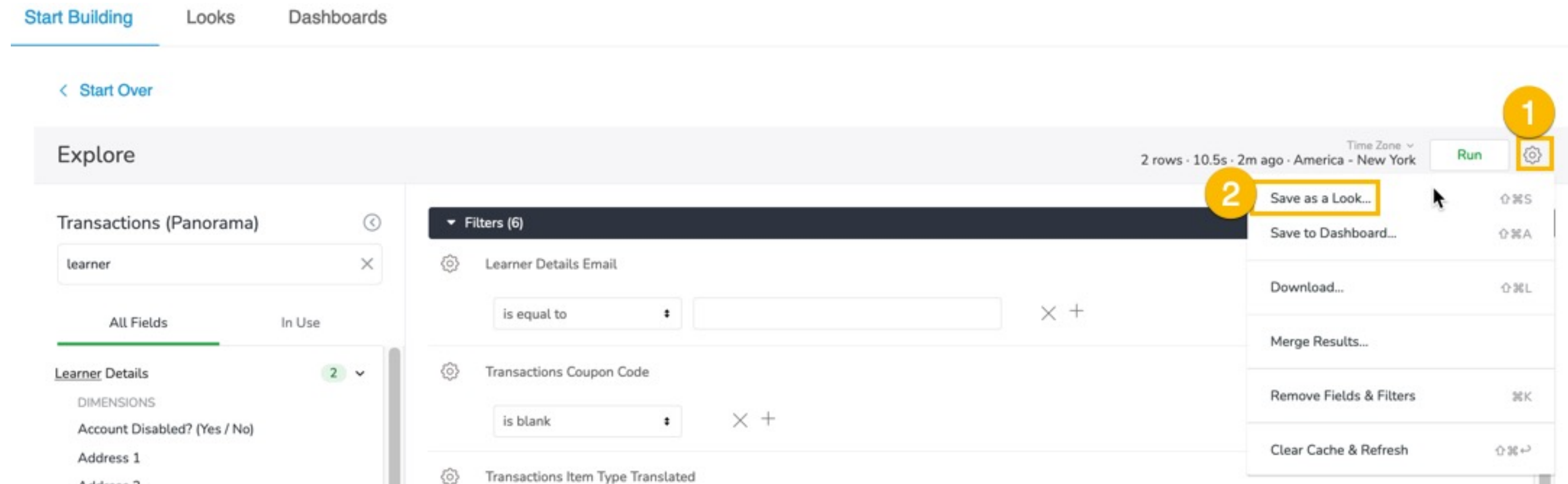
Transactions Title	Transactions Item Type Translated	Transactions Amount Charged	Transactions Amount Discounted	Transactions Amount Disputed	Transactions Amount Net	Transactions Affiliate	Transactions Coupon Code	Transactions Timestamp Time	Learner Details First Name
1 Framework Homebuyer Education Course	Learning Path	\$2.00	\$0.00	\$0.00	\$2.00	cass-clone-test2		2023-02-23 11:29:50	
Lesson 1:									

# Creating Custom Reports

## Finalizing Your Report

Once you have created a report, you can save the report as a look (standalone report) or add it to a dashboard. We recommend saving as a look to start.


1. Click on the gear icon at the very top (to the far right of the page) Select “Save as a Look”
2. Name your report and choose where you want to save it.
  - **Personal:** Only you will have access to this report
  - **Group:** Any other users with a LMS manager account in your organization can access the report

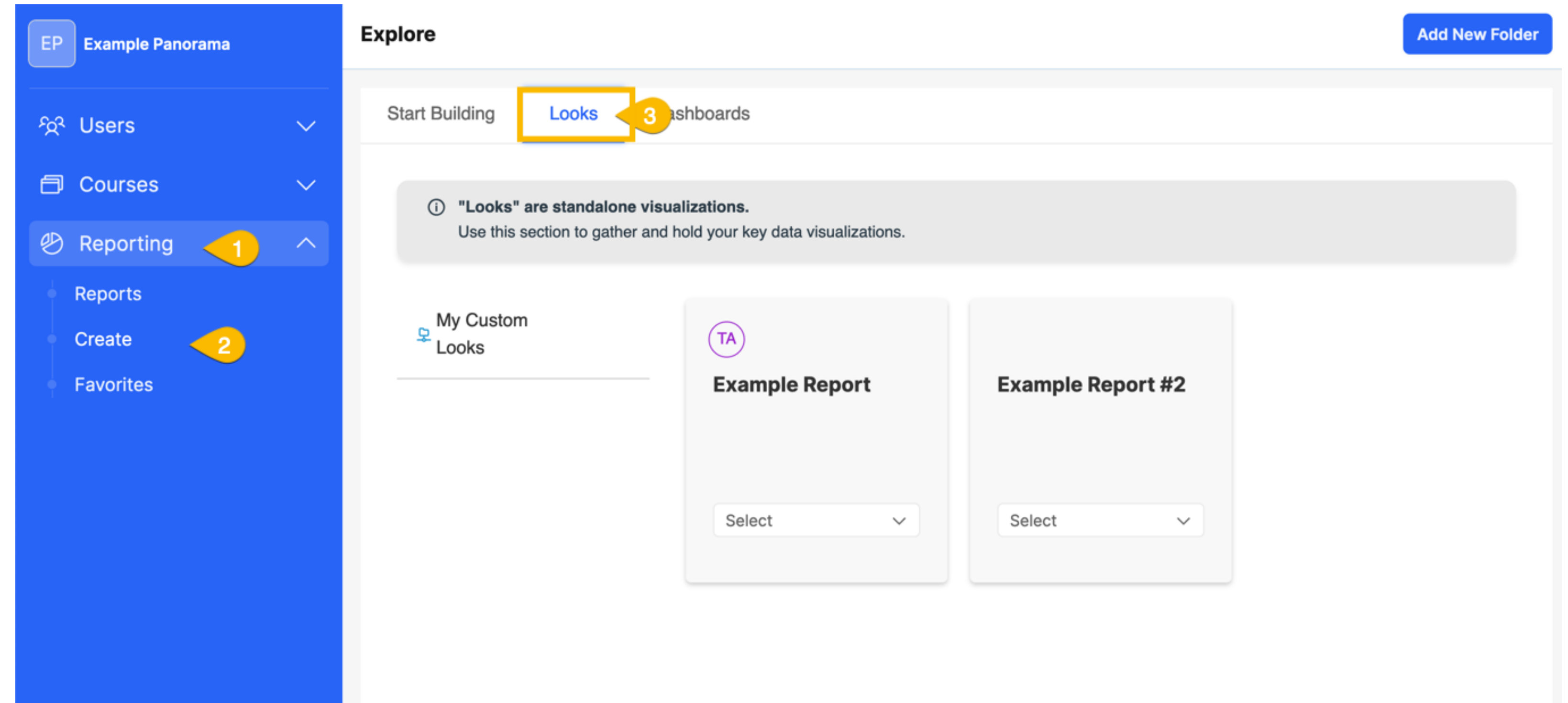




# Creating Custom Reports

## Locating Saved Reports

1. Go to Reporting in the left menu
2. Select Create
3. Select the Looks tab at the top of the page
4. Here you should be able to see your personal reports as well as any group reports you share with others in your organization.
  - Reports that show your initials with a circle around it like  in the example to the right indicate the report is a Personal Report and is visible only to you.



# Custom Reporting Tips

## Sorting Data

- You can sort any column by clicking on the header and sorting by ascending or descending order.

## Scheduling Report Sends

- You can set this report to send to specified email addresses at your preferred interval by going to the report > gearwheel icon > schedule.

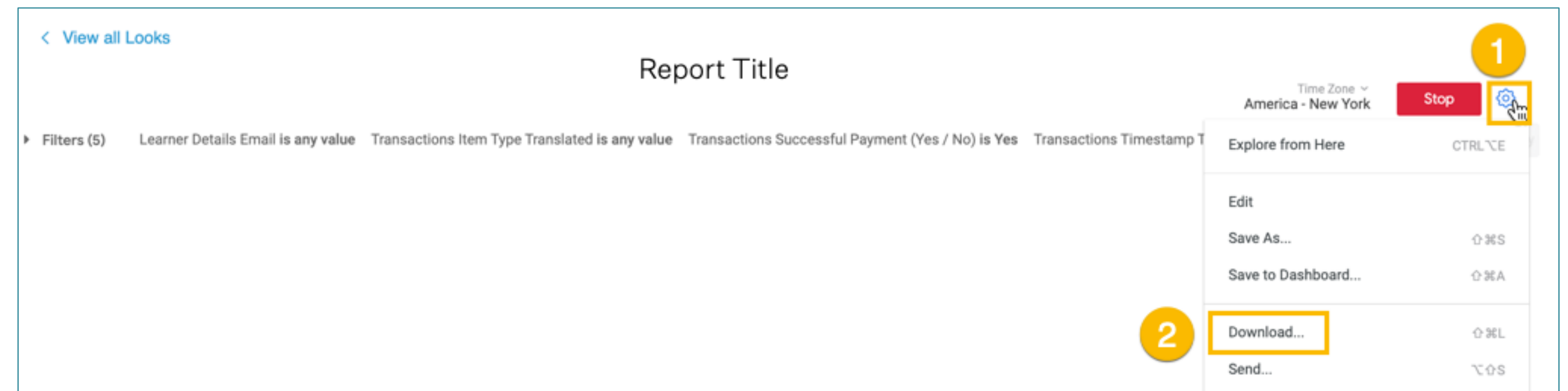
- ✓ Ensure the report is named as you'd like.
- ✓ Enter the email address of recipients to receive the report
- ✓ Choose how you would like to have the data provided.
- ✓ Leave the trigger set to interval.
- ✓ Choose how frequently you would like your report, including delivery time.
- ✓ Chose “save all.”

The image displays two screenshots of a reporting tool interface. The left screenshot shows a report menu with a 'Schedule...' option highlighted. The right screenshot shows the 'Schedule User Quiz Attempts & Outcomes' configuration window. The configuration window includes fields for 'Give your schedule a name', 'Where should this data go?' (Email, Webhook, Amazon S3, SFTP), 'Who should it be emailed to', 'Format data as', 'Trigger' (Repeating interval, Datagroup update), 'Deliver this schedule' (Daily, Weekly, Monthly, Hourly, By minute), and 'Send' (Every day, At 8:00 AM). The bottom of the window shows a summary and a 'Save All' button.



# Downloading Your Reports

1. To download your report, locate on the gearwheel icon located in the top right. If you don't see the gearwheel, look for the timestamp in the top right corner and hover there. The gearwheel should appear.
2. Click the gearwheel and select download
3. From here you can choose the file format, select results, values, and limits, and name your file.
  - If you want to do any further sorting, filtering, or visualization editing, we recommend selecting Excel as the file format.
  - We recommend setting limit to include “All Results” as the “Results in Table” will be limited to the first 500 results and may not include everything that could appear.
4. When you are ready, select download.
5. The file will begin processing in another window and may take awhile depending on how much data is contained in the report. When your document is ready the window should notify you of success and where to find your report.



# Troubleshooting

## 401 Error / Not Authorized

- Ensure you are in Google Chrome or Firefox
- Ensure you are not in Private/Incognito mode
- Try refreshing your page
- If issues persist, try clearing your cache then logging out and back in

## No Results

- There may not be any data for the specific data and filters you've selected.
  - ✓ Review your filters for accuracy. Sometimes it helps to uncheck your filters and try running the report to see if there is simply no data within the constraints selected.
  - ✓ Try adding filters back in one at a time.

**You can contact always contact our team any time via email at:**  
[partners@frameworkhomeownership.org](mailto:partners@frameworkhomeownership.org)



# Contact Us!

## Customer Success

Please direct clients to our wonderful Customer Success team for any support needs or questions. We're always more than happy to help!

[support@frameworkhomeownership.org](mailto:support@frameworkhomeownership.org)

Monday-Friday: 9 a.m. to 5 p.m. ETT



## Partnerships

Please contact our Partnerships team if you have any direct questions or need support surrounding your partnership or partner administrative needs! We're happily available by email at:

[partners@frameworkhomeownership.org](mailto:partners@frameworkhomeownership.org)



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