Framework™

PARTNER MANAGER GUIDE

REPORTS

WHAT'S COVERED

OVERVIEW

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

Framework

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.

Framework

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.

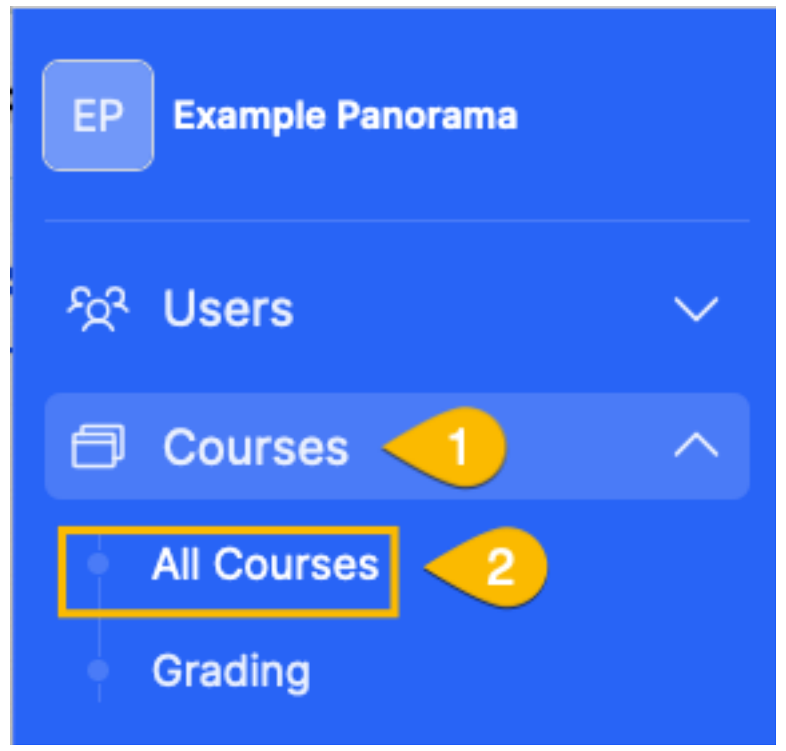
- **Learners –** See a detailed list of users and their respective progress % and status (started, not-started, in progress) within a learning path. Additionally, view user status in specific lessons (courses) within the learning path.

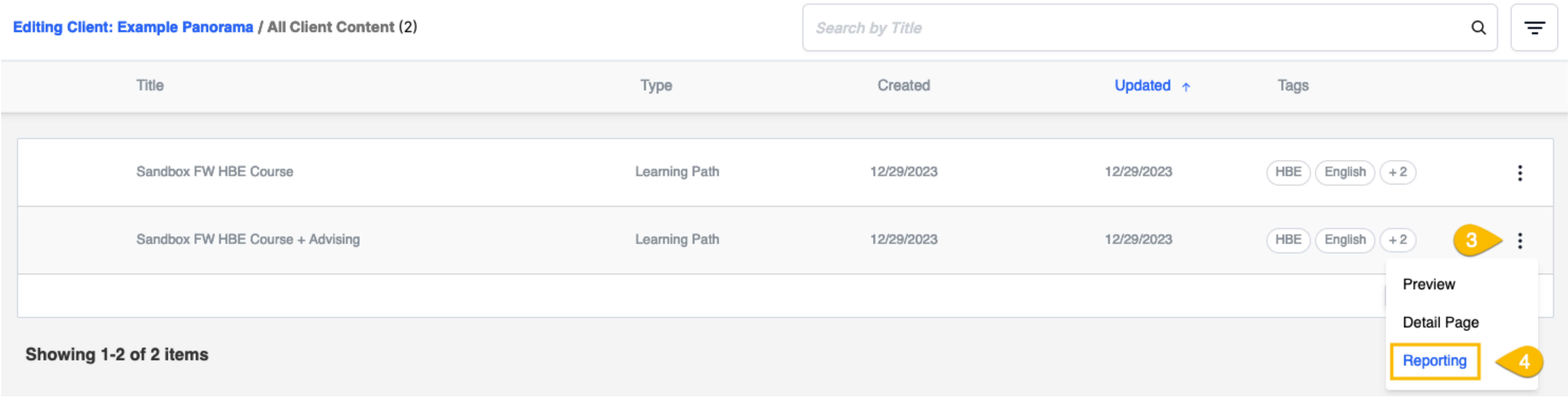
Note: *You will also see a tab for* ***Competencies****, but these reports will be blank since the Framework Homebuyer Education course does not utilize this function.*

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

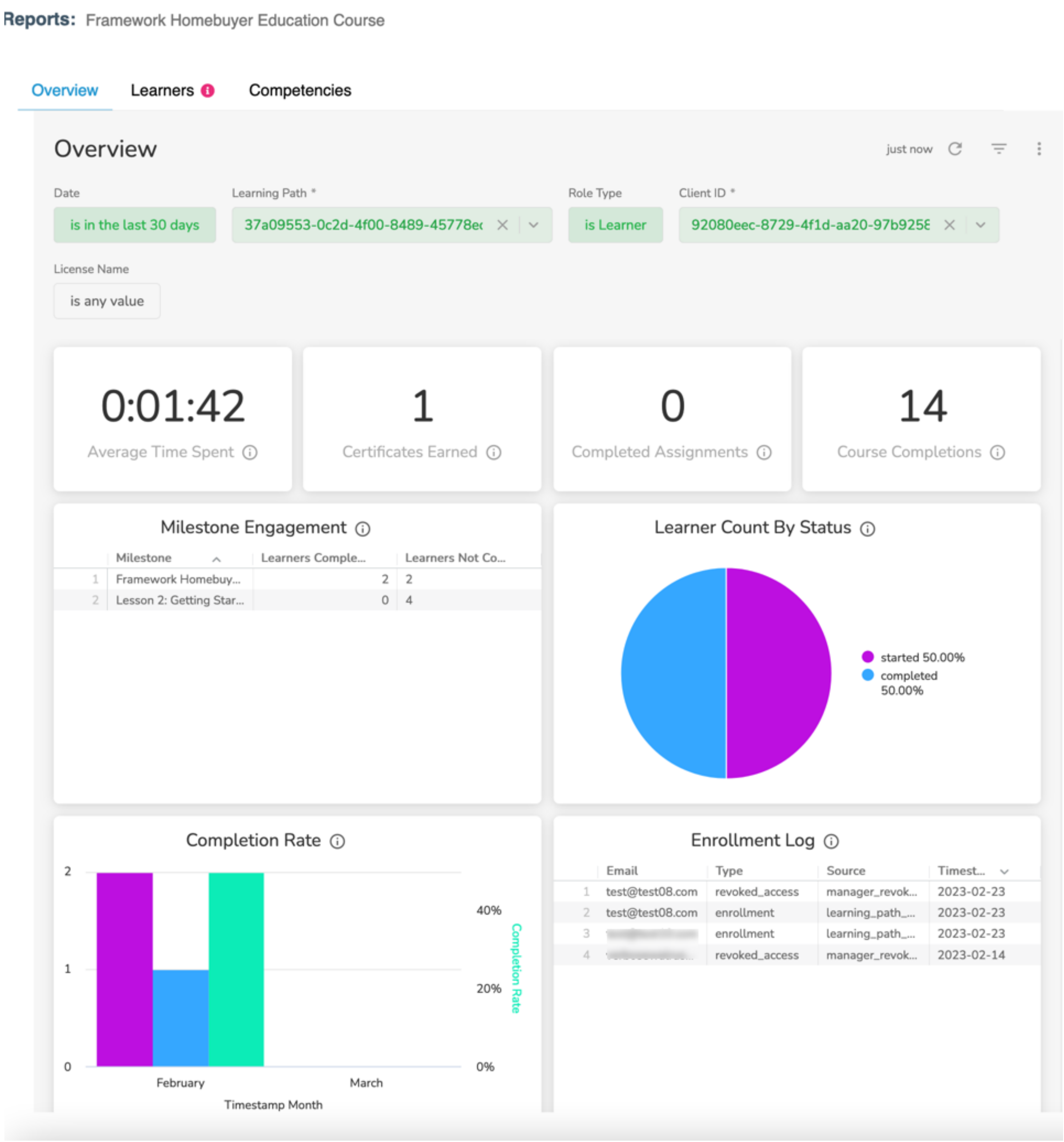




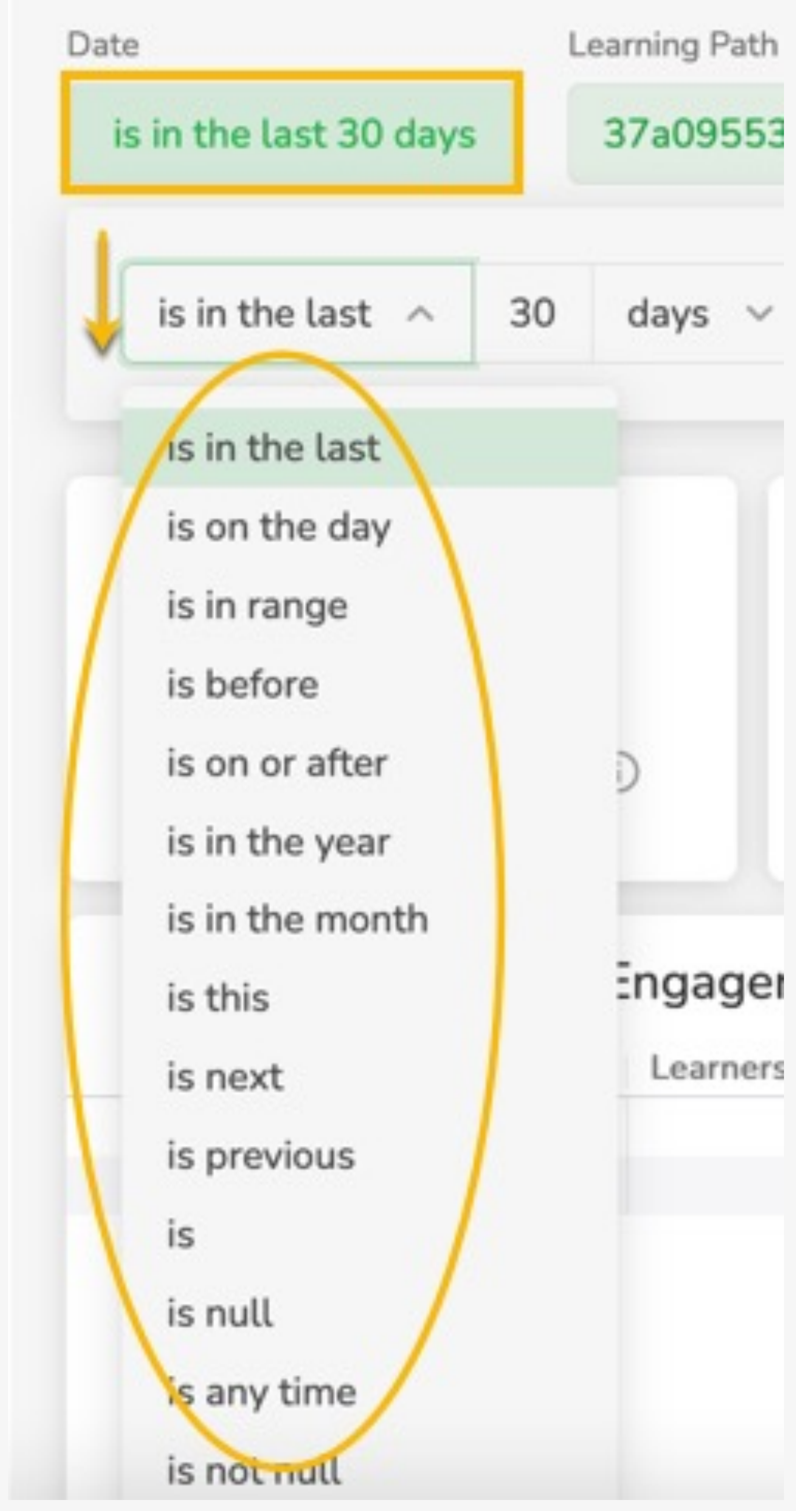
Viewing Content Reports

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!



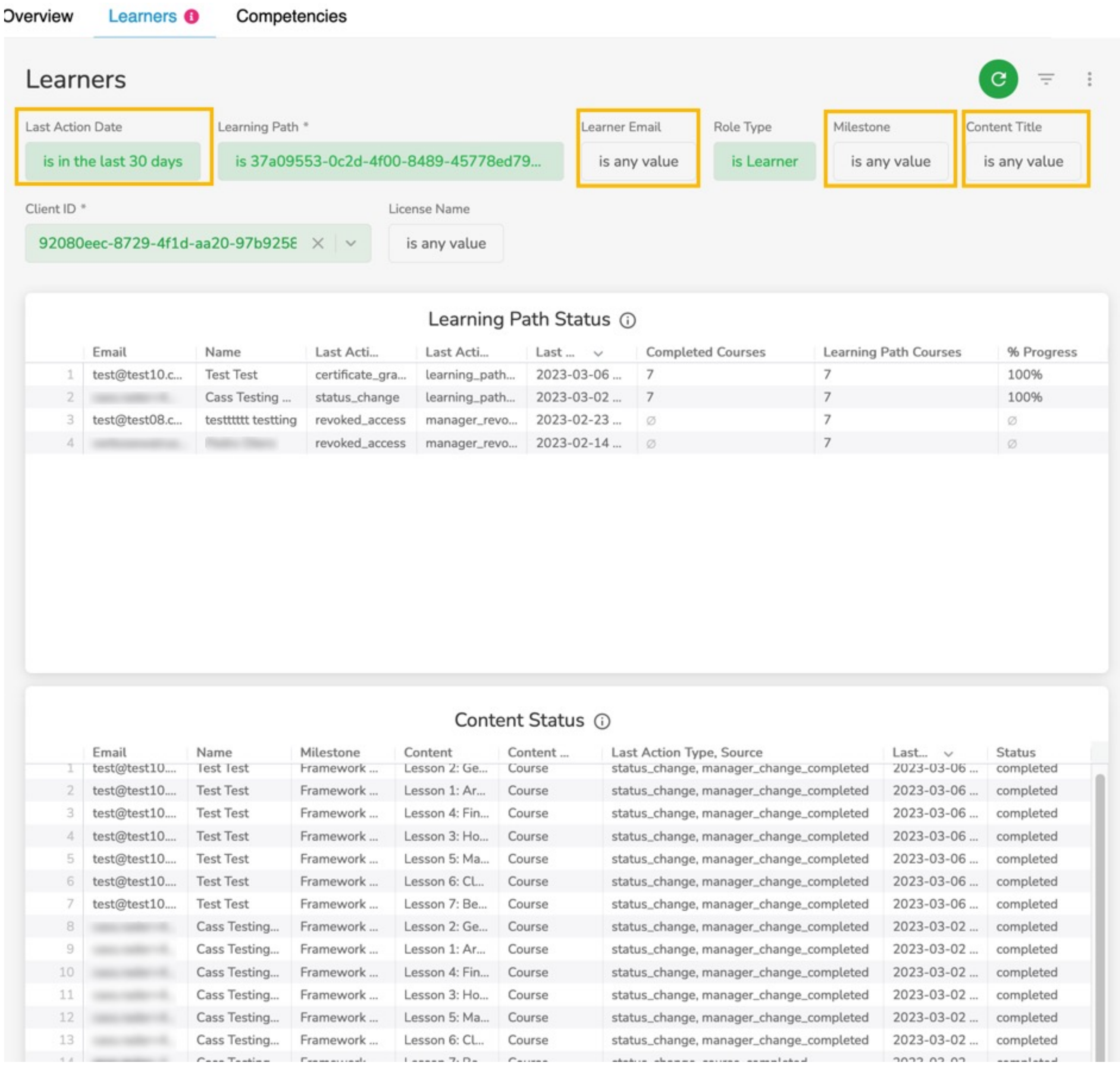
Date filtering options



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!



Pro Tip

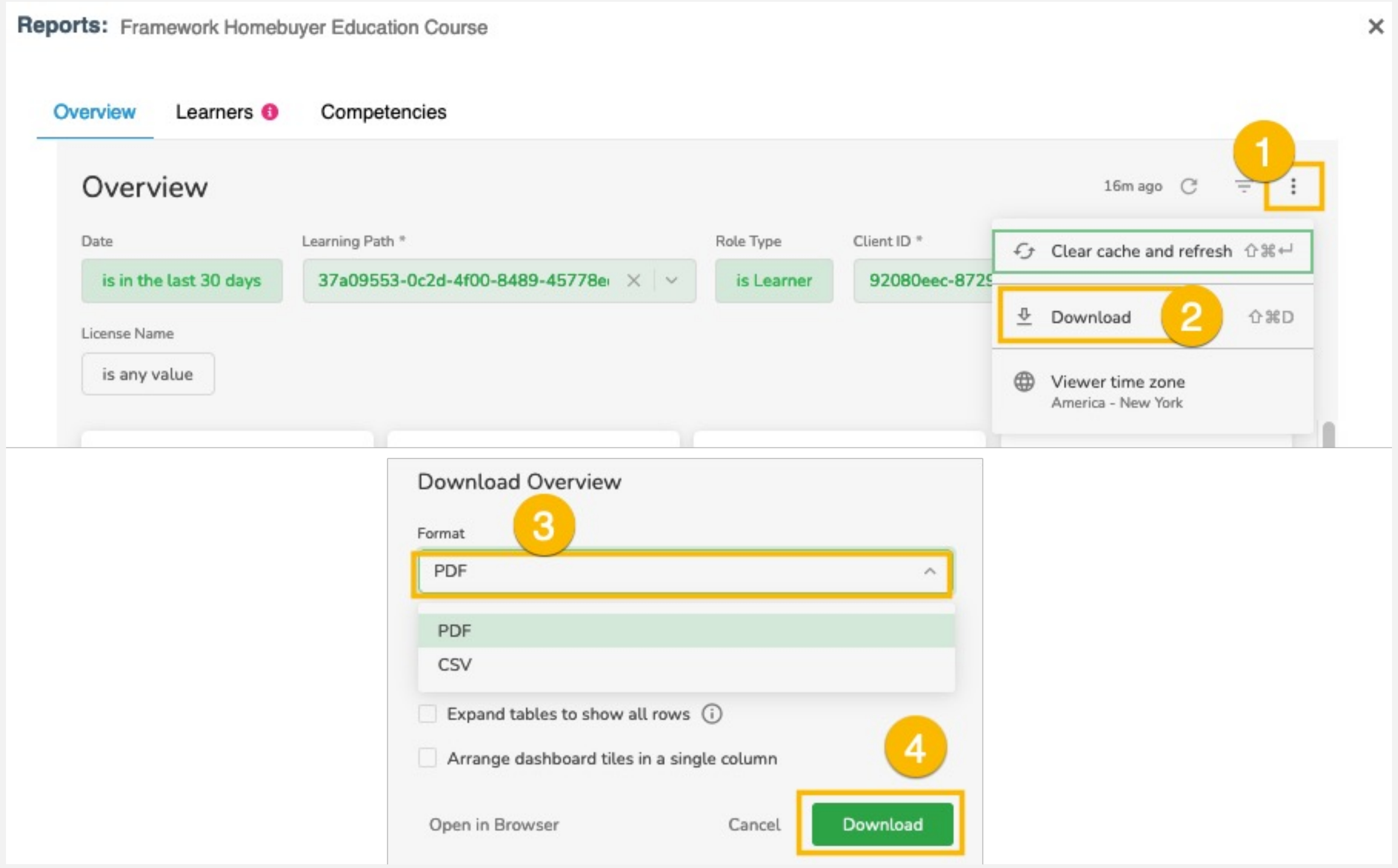
You can click on any header to sort that column by ascending or descending order

Downloading Content Reports

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

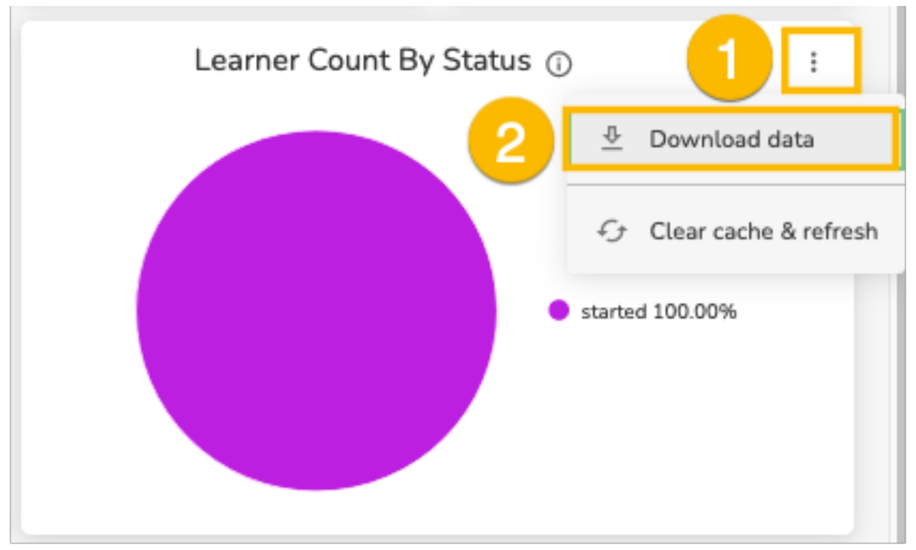
Download Entire Report

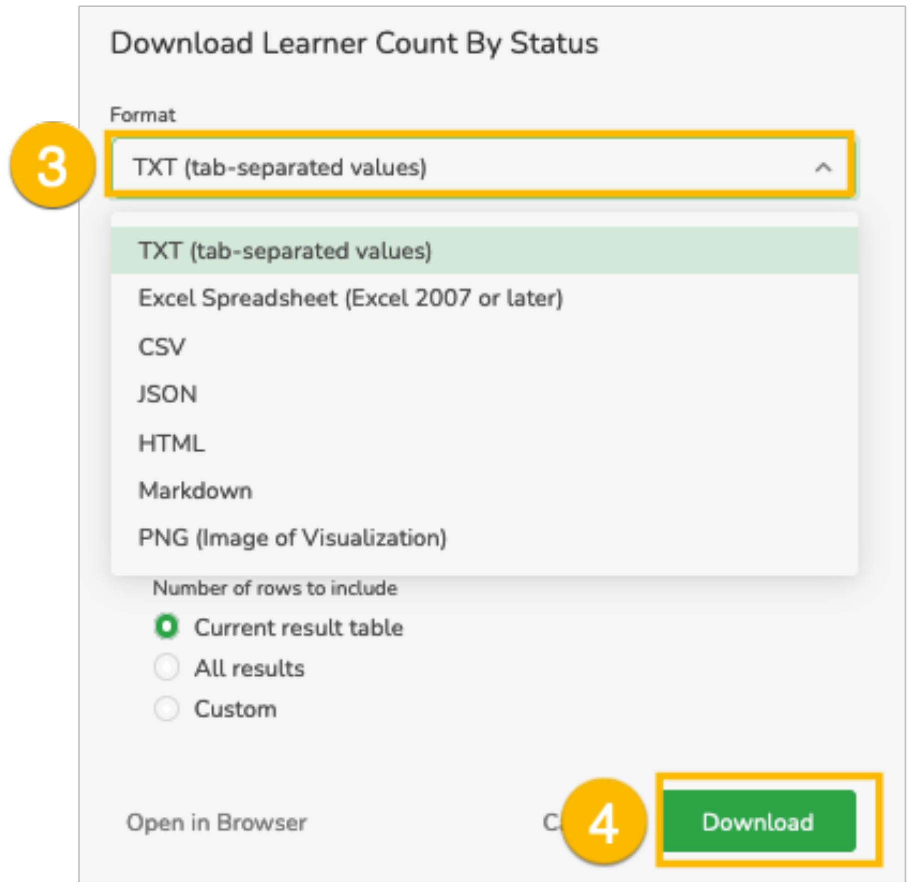
1. Click on the three stacked dots in the right corner
2. Selecting download
3. Choosing either CSV or PDF



Download Specific Widget or Dataset

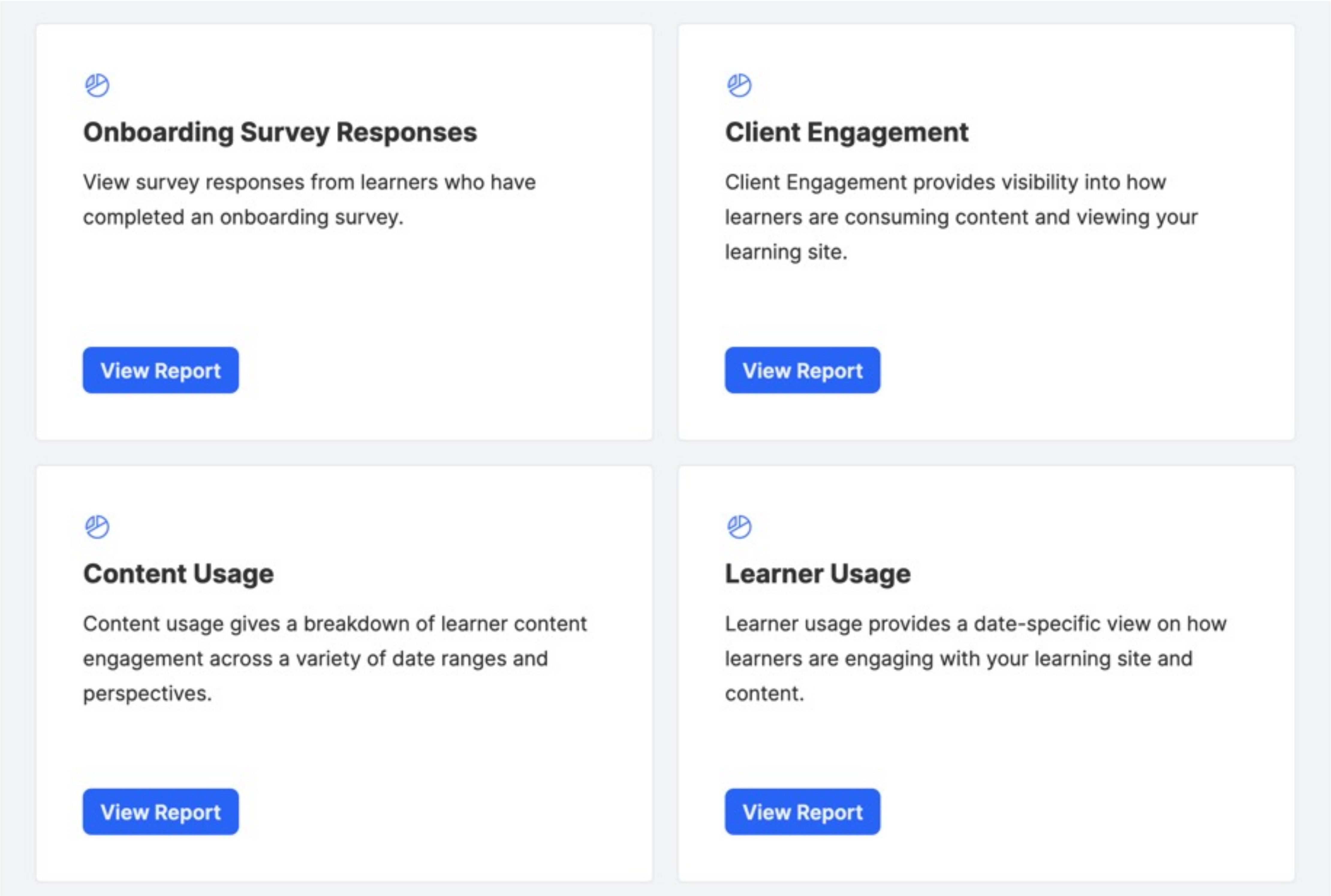
1. Locate the widget/dataset you'd like to download
2. Click on the three stacked dots in the right corner
3. Selecting download
4. Choosing either CSV or PDF





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.

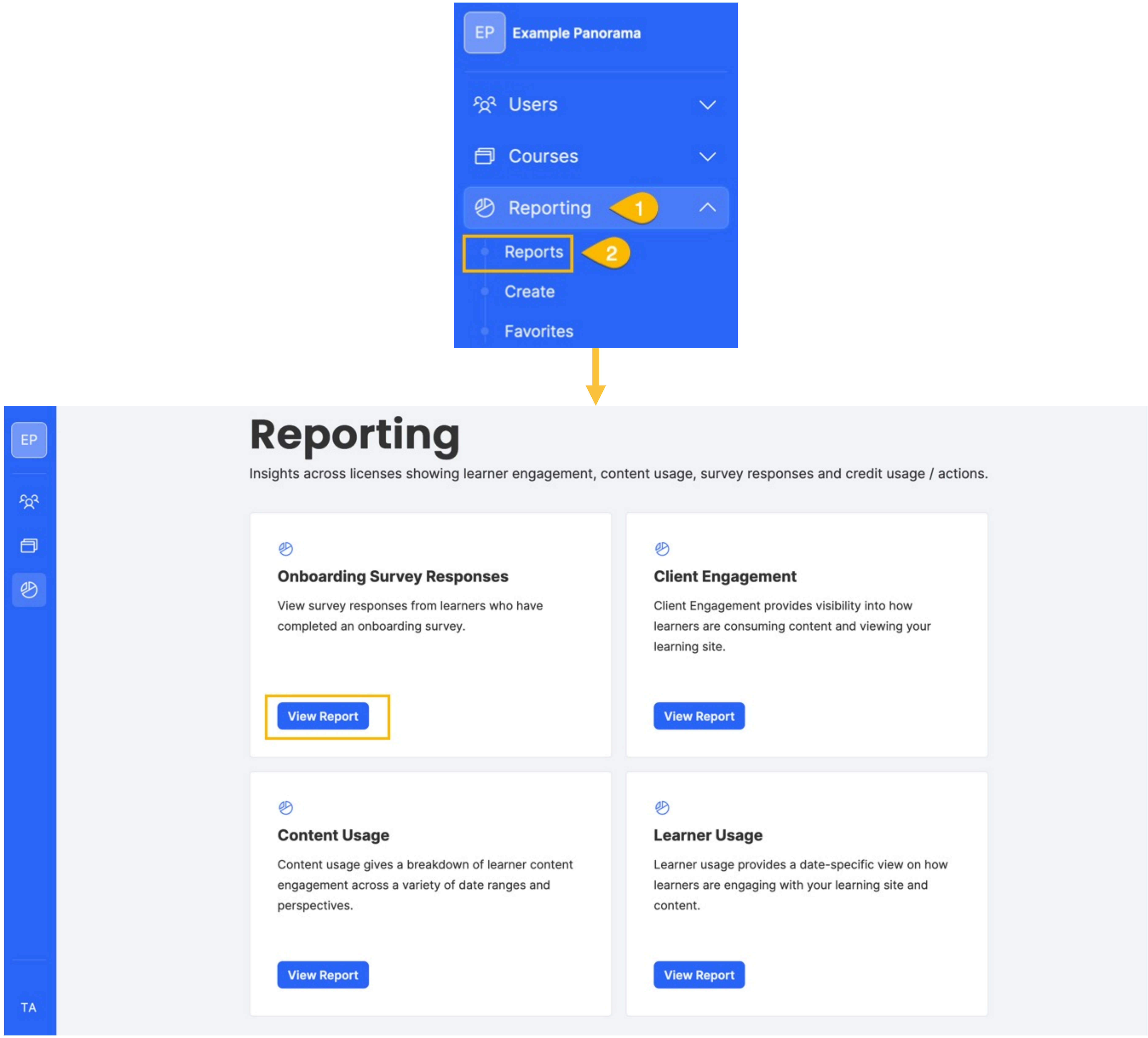


Much like content reports, these reports contain the ability to filter by date and download

Viewing Pre-Built Reports

To view a content report:

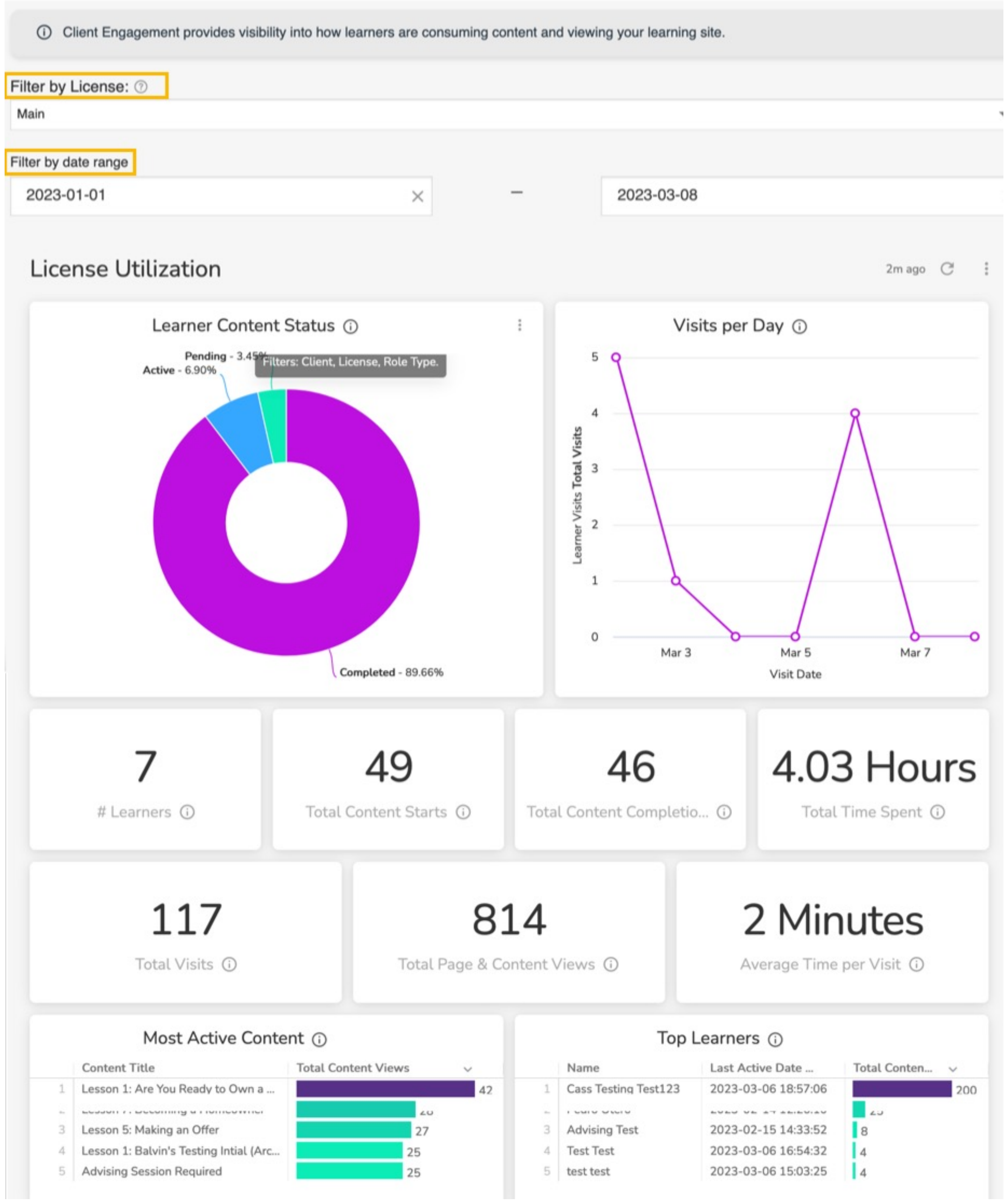
1. From the left menu, select Reporting
2. Next, select reports
3. On the page that appears, select the report you would like to view



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.

Learner Usage Overview

	Last Name	First Name	Email	Last Active ...	Content...	Content Co...	# Complete...	# Quiz Atte...
1	Test123	Cass Testing	[illegible]	2023-03-06 18:...	27	26	0	18
2	Test	Test	test@test10.com	2023-03-06 16:...	8	8	1	0
3	test	test	test@test1000.c...	2023-03-06 15:...	8	8	1	0
4	[illegible]	[illegible]	[illegible]	2023-02-14 12:...	4	3	0	0
5	Test	Advising	advtest@test.com	2023-02-15 14:...	2	1	0	0
6	testing	testttttt	test@test08.com	2023-03-08 10:...	0	0	0	0
7	∅	∅	∅	2023-02-23 11:...	0	0	0	0

Learner Usage Details

	Email	Name	Last Activ...	Content Type	Content Title	Status	Total Content ...
1	test@test08.com	testttttt testting	2023-03-08	Course	Lección 1: ¿Está Pre...	started	0
2	test@test1000.com	test test	2023-03-06	Course	Lesson 7: Becomin...	completed	0
3	[illegible]	Cass Testing Test1...	2023-03-06	Course	Lesson 1: Are You R...	completed	41
4	test@test10.com	Test Test	2023-03-06	Course	Lesson 4: Finding t...	completed	2
5	[illegible]	Cass Testing Test1...	2023-03-06	Course	Lesson 3: How to S...	completed	21
6	[illegible]	Cass Testing Test1...	2023-03-06	Course	Course Example Co...	started	3
7	[illegible]	Cass Testing Test1...	2023-03-06	Course	Lesson 5: Making a...	completed	27
8	[illegible]	Cass Testing Test1...	2023-03-06	Course	Lesson 4: Finding t...	completed	21
9	test@test10.com	Test Test	2023-03-06	Course	Lesson 5: Making a...	completed	0
10	test@test1000.com	test test	2023-03-06	Course	Lesson 3: How to S...	completed	0
11	test@test10.com	Test Test	2023-03-06	Course	Lesson 2: Getting S...	completed	0
12	[illegible]	Cass Testing Test1...	2023-03-06	MicroCourse	Advising Session R...	completed	13
13	test@test1000.com	test test	2023-03-06	Course	Lesson 2: Getting S...	completed	0
14	test@test1000.com	test test	2023-03-06	Course	Lesson 5: Making a...	completed	0
15	test@test1000.com	test test	2023-03-06	Course	Lesson 6: Closing o...	completed	0
16	[illegible]	Cass Testing Test1...	2023-03-06	Course	Lesson 2: Getting S...	completed	22

Downloading Pre-Built Reports

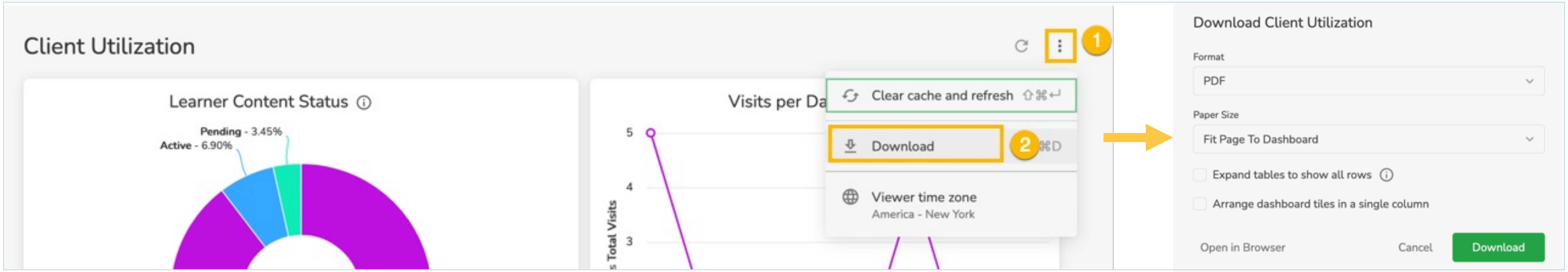
To download the data from any pre-built report as a PDF or a .CSV file:

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.

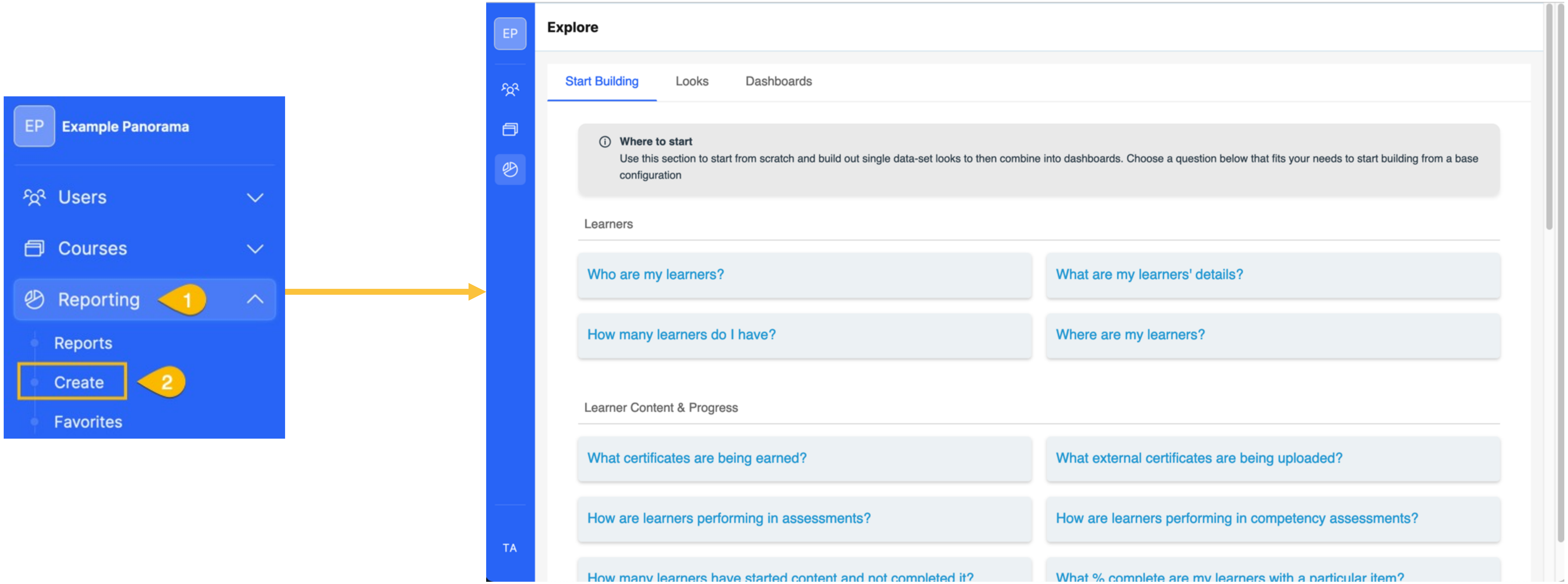
The file will begin processing in another window and may take awhile depending on how much data is contained in the report. When your document is ready the window should notify you of success and where to find your report.



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.



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?

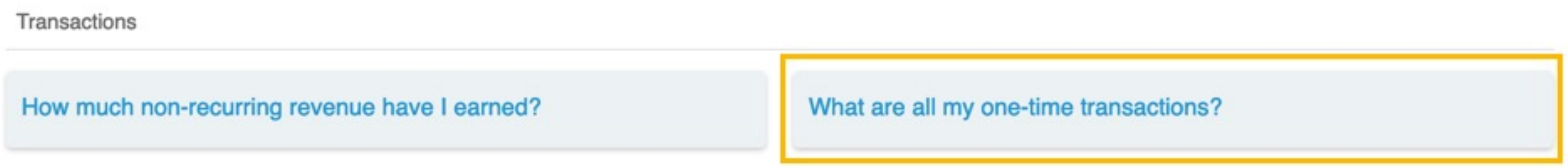
Transactions

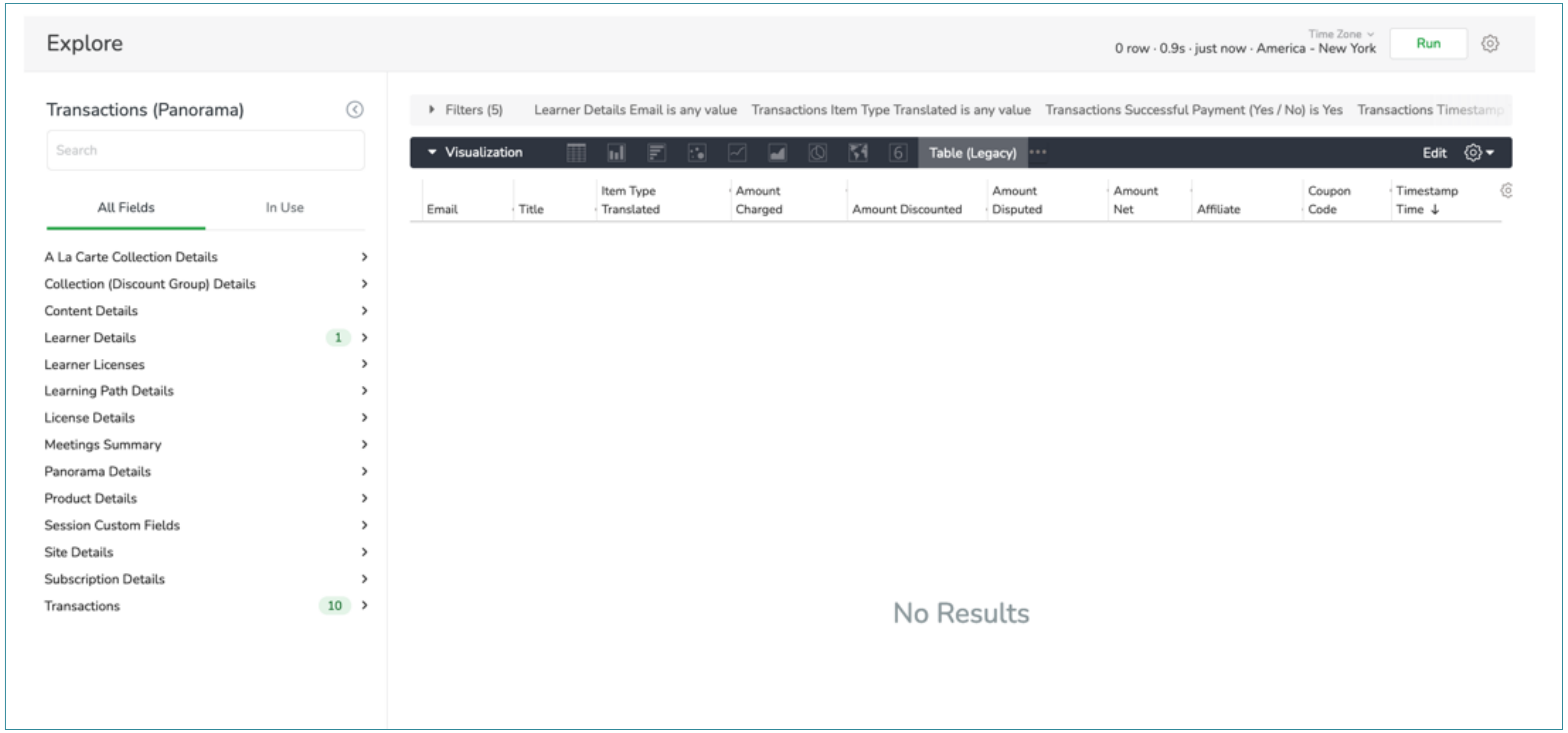
- How much non-recurring revenue have I earned?
- What are all my one-time transactions?

Subscription Transactions

- How much recurring revenue have I earned?
- What are all my recurring transactions?

Creating Custom Reports





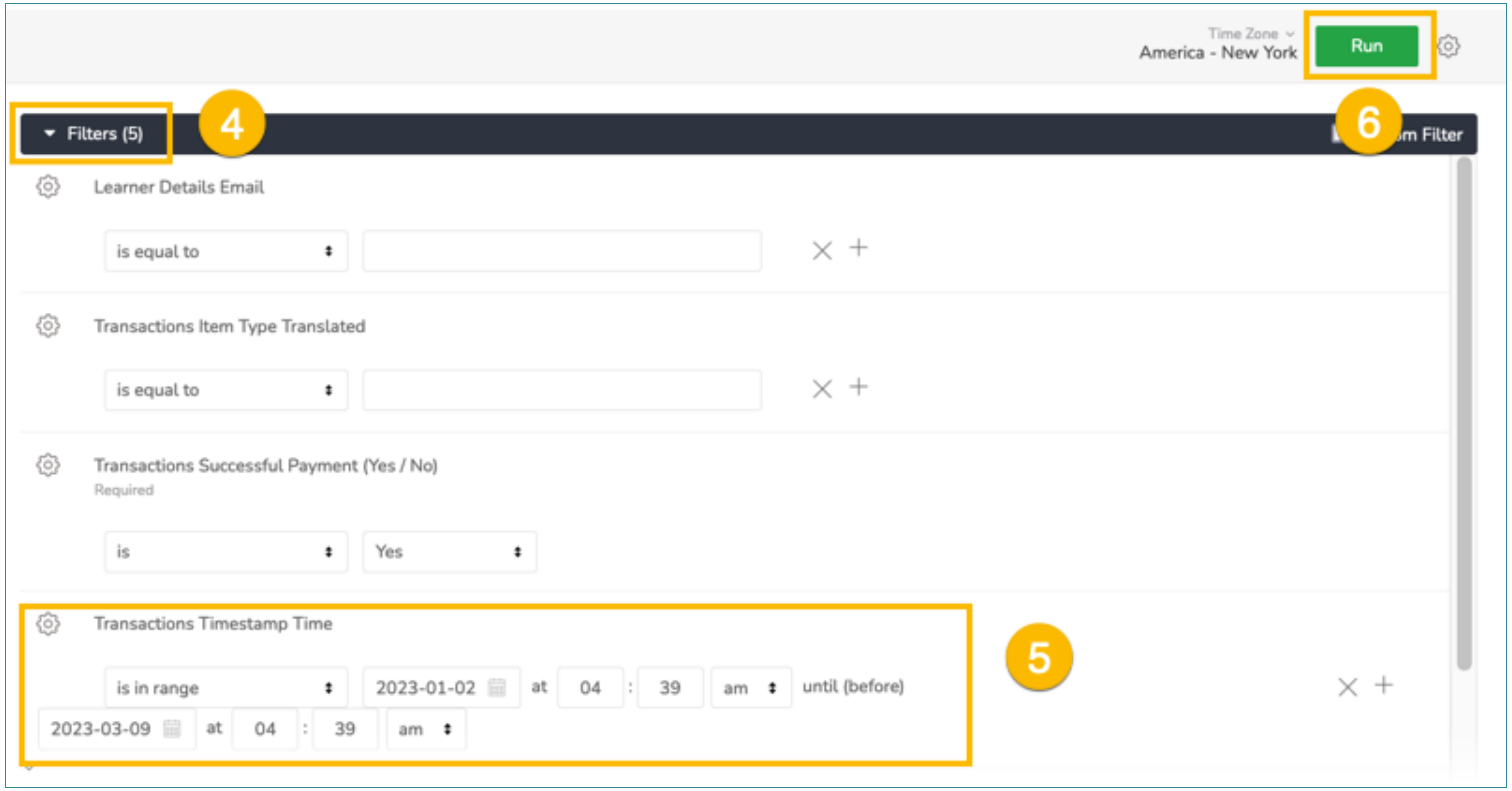
2. Let's say I want to understand purchases within a specific timeframe.

   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.

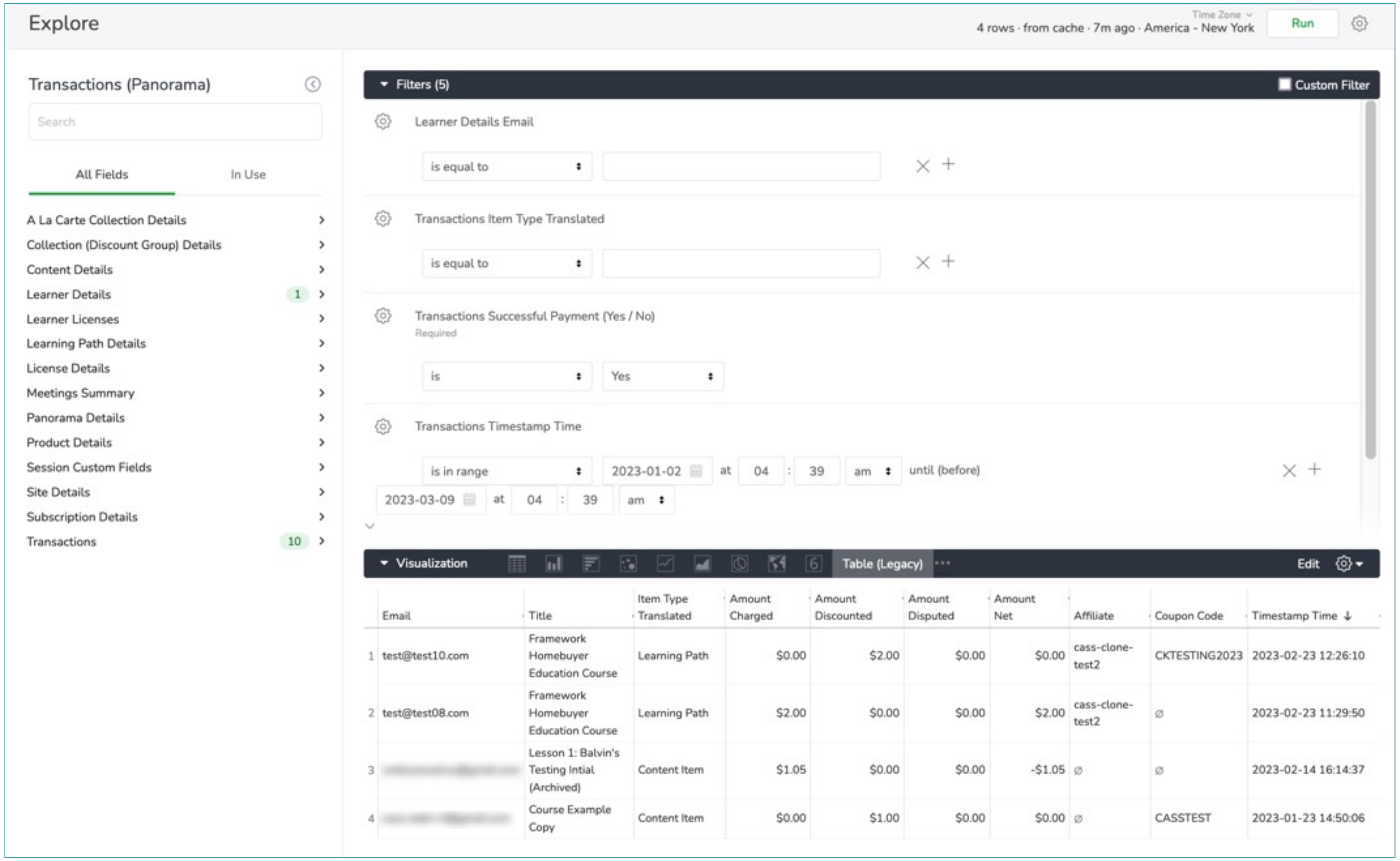
Creating Custom Reports

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 or results I get.



Creating Custom Reports

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



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.

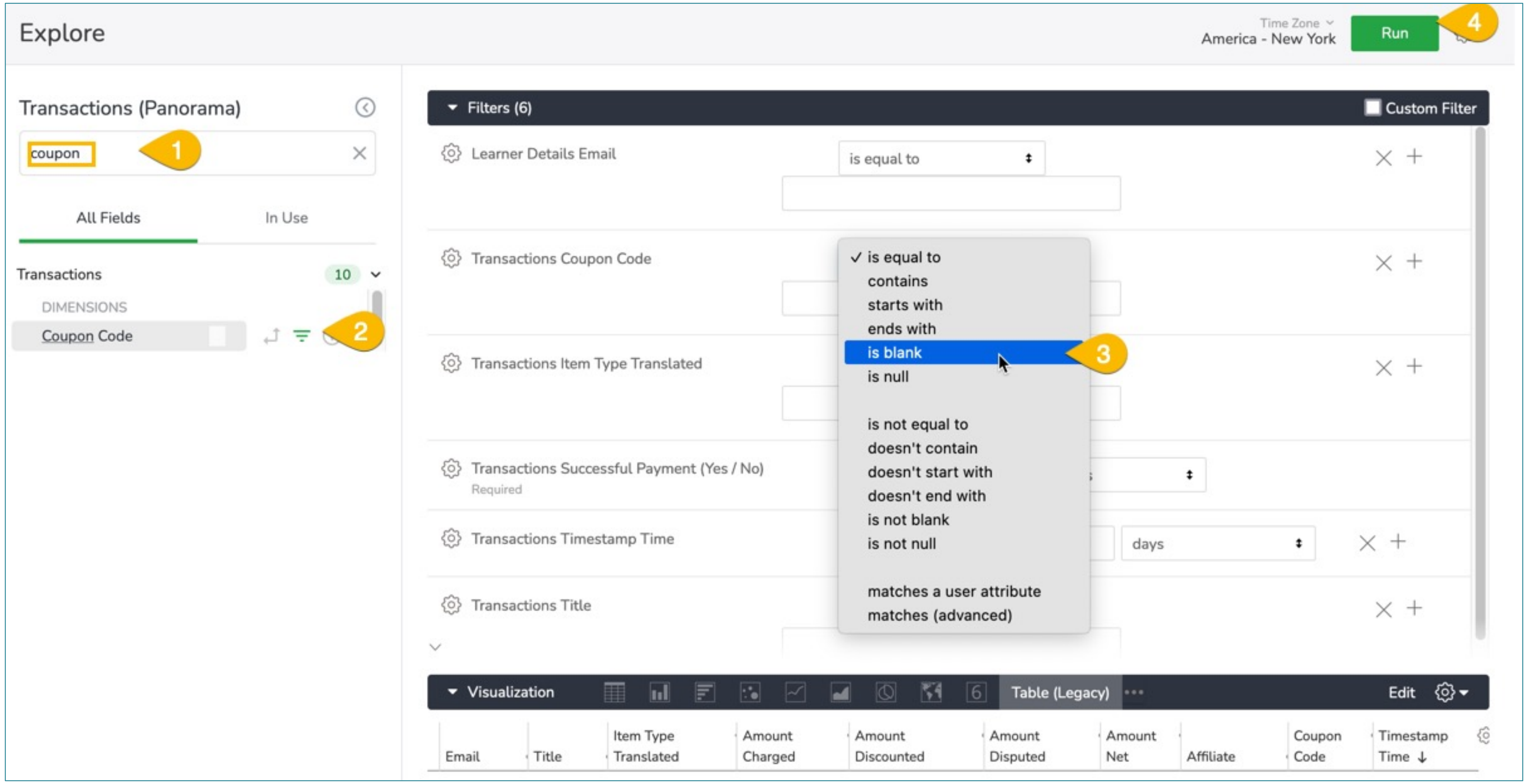
2. If you know what you are looking for, you can use the search field found on the left side of the page. Alternatively, you can select "all fields" and scroll through to see all available data sets and their associated fields. To add the filter, click on the funnel icon so that it turns green.

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

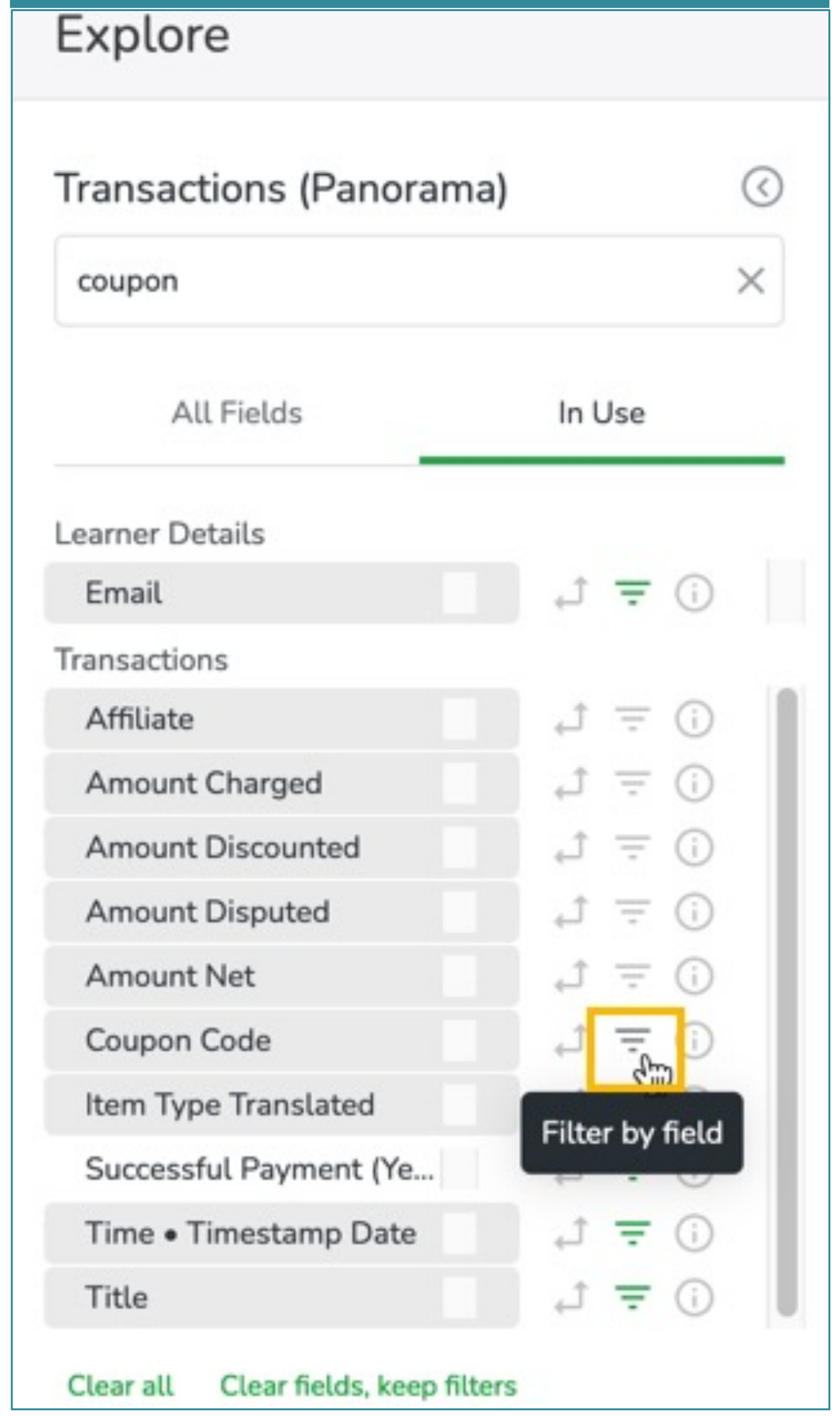


Creating Custom Reports

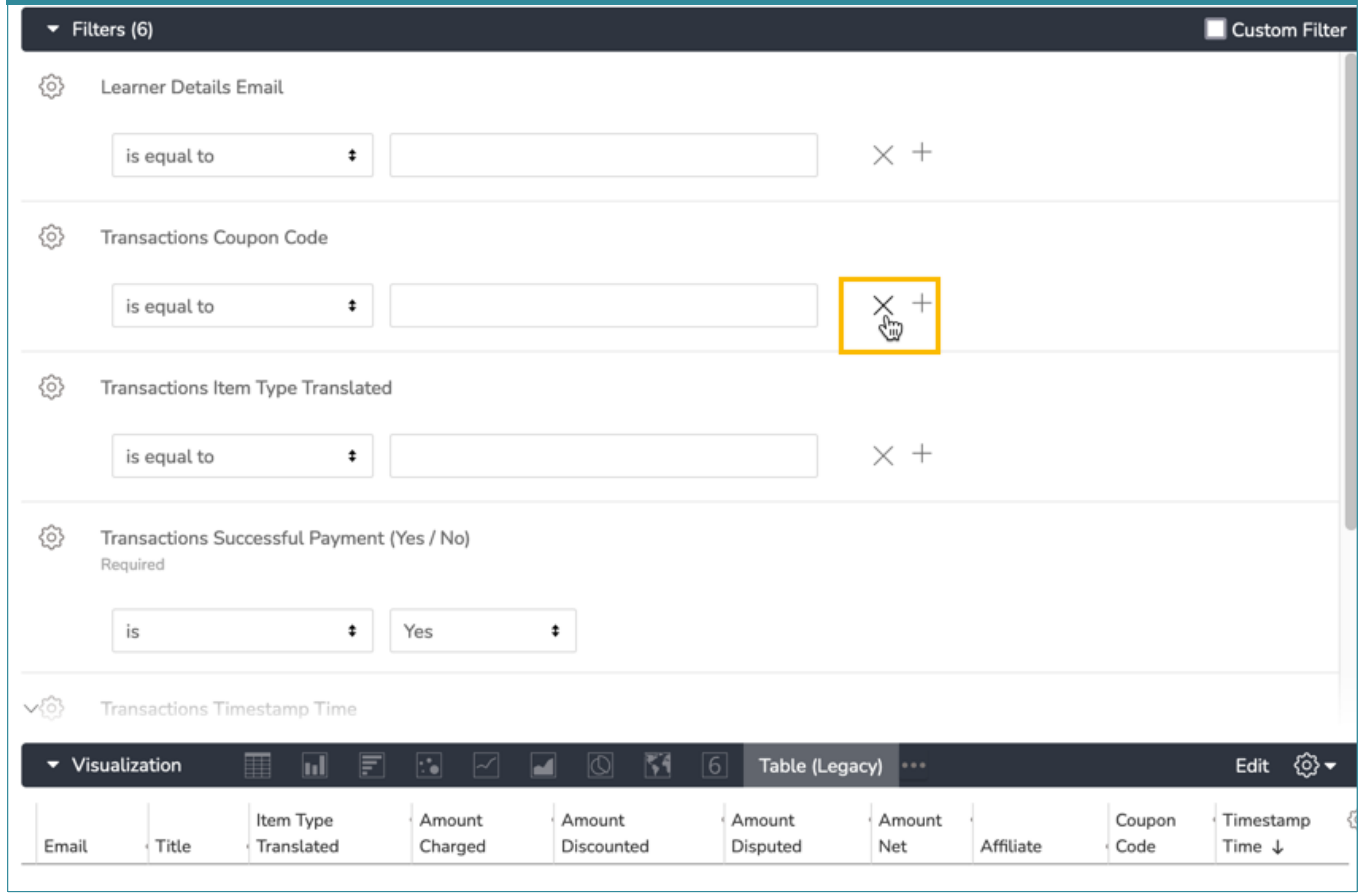
Removing Field Filters

- 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



Option B

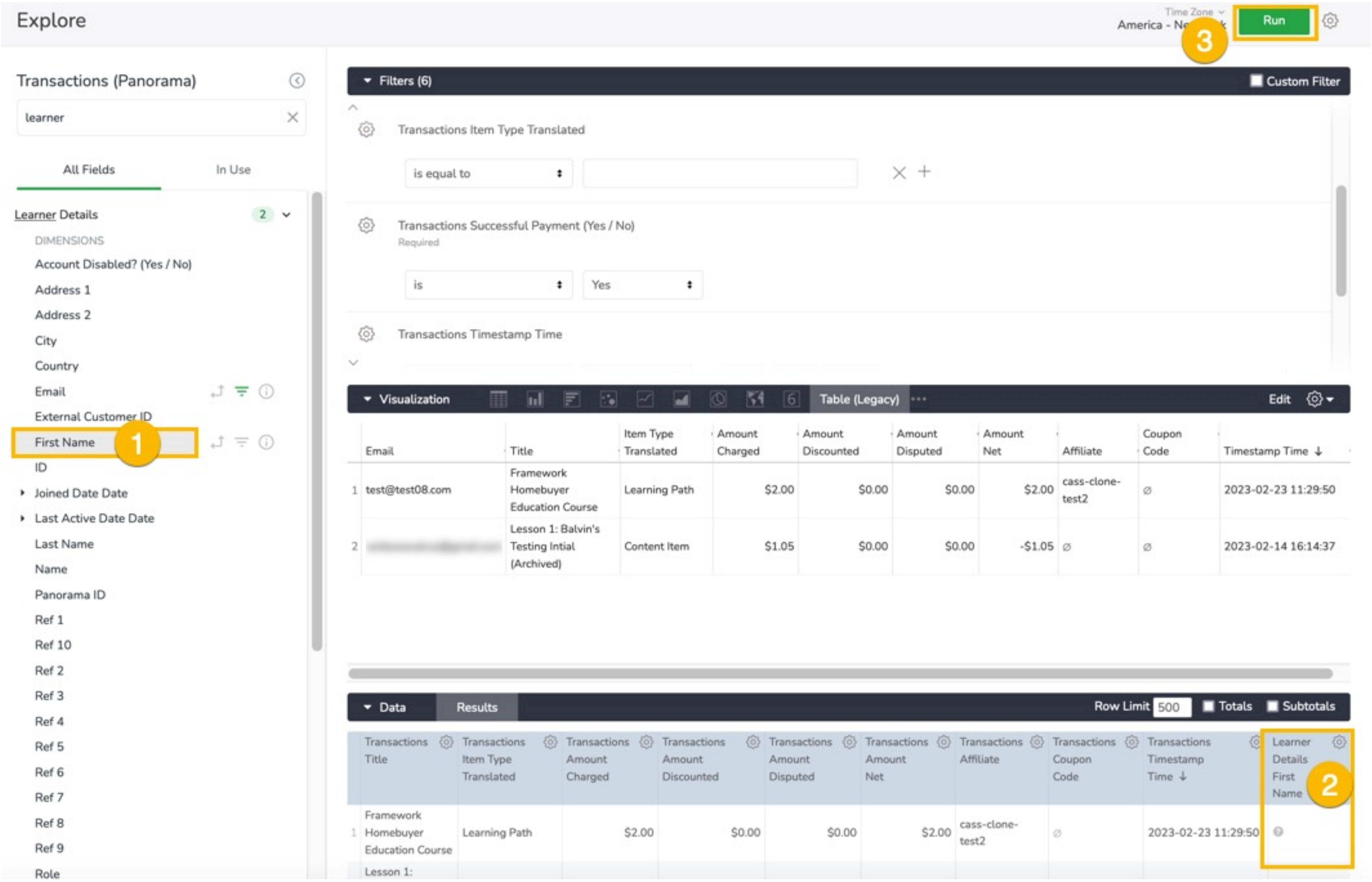


Creating Custom Reports

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.

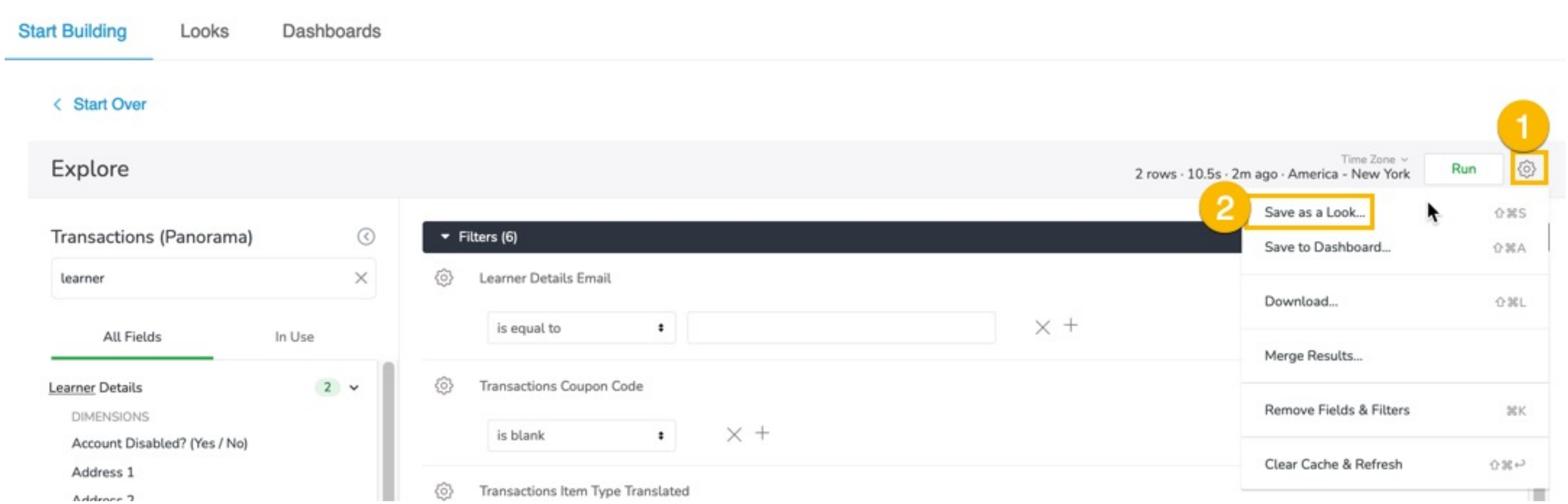


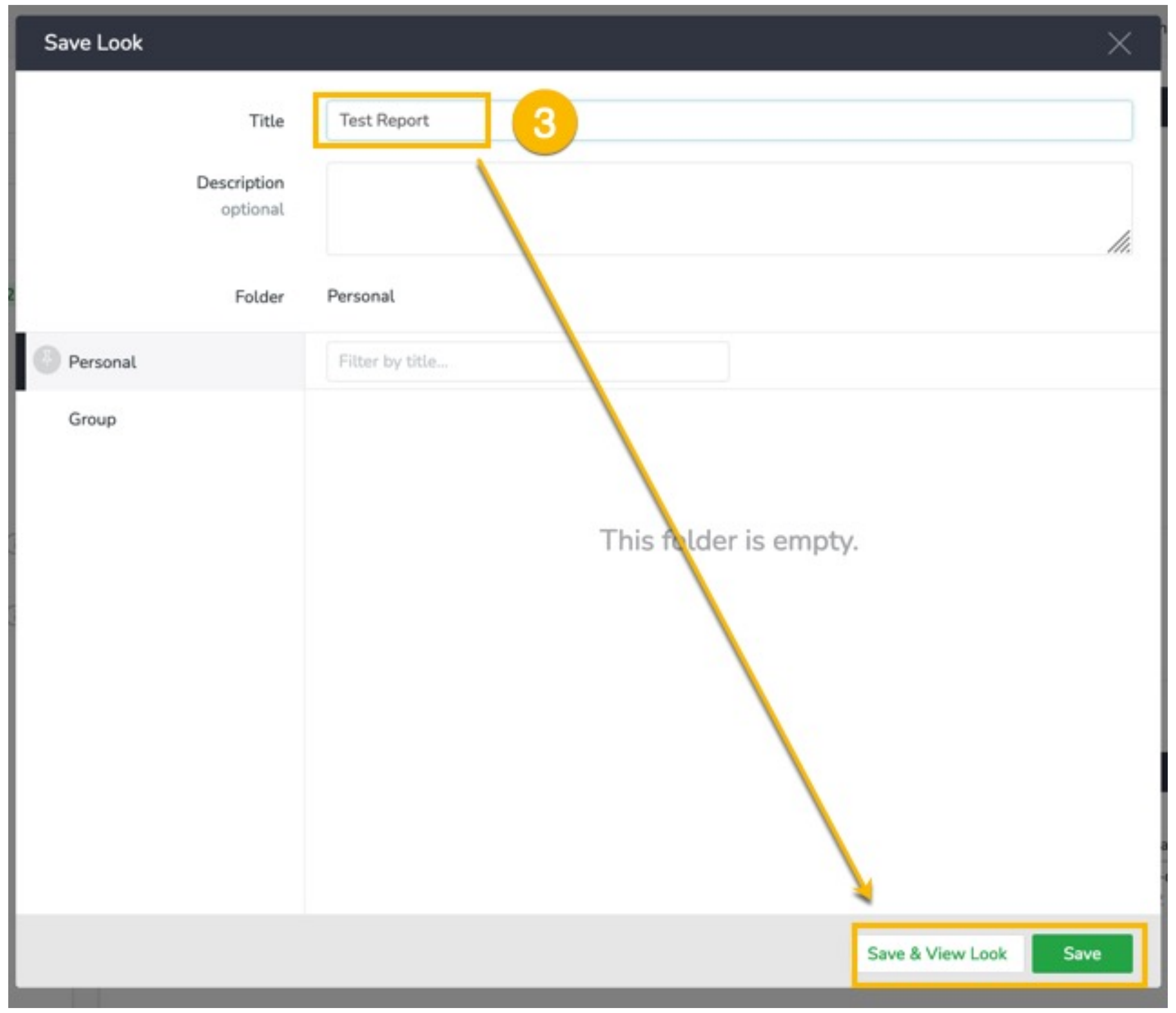
Creating Custom Reports

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

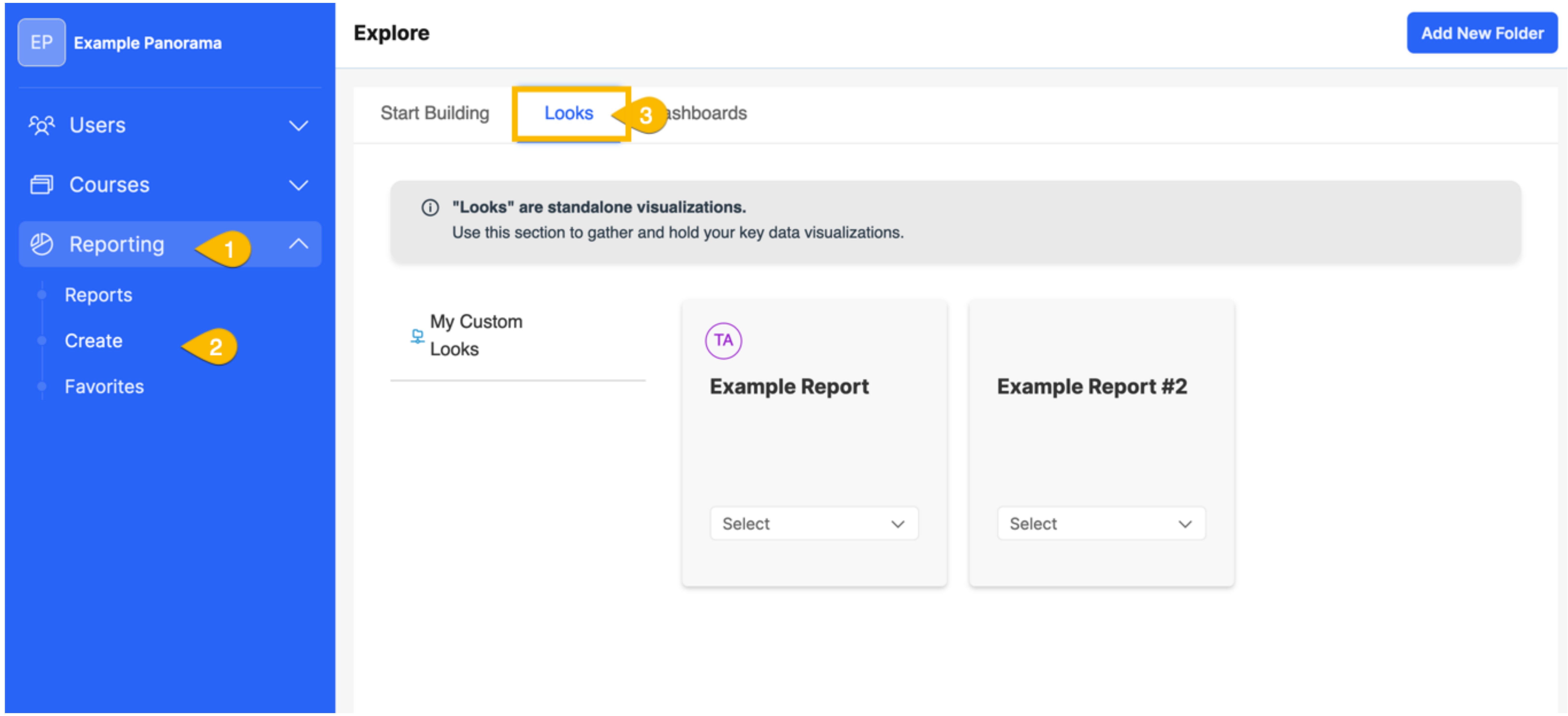




Creating Custom Reports

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 TA 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.

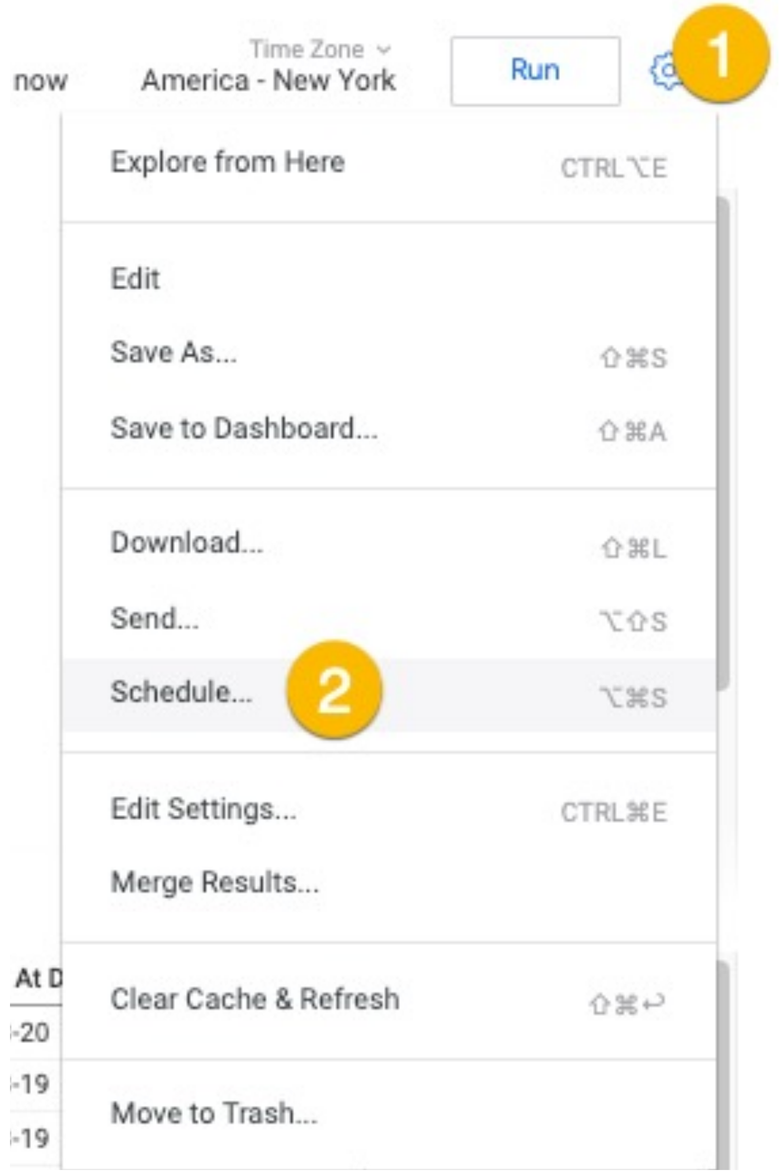
✓ Enter the email address of recipients to receive the report

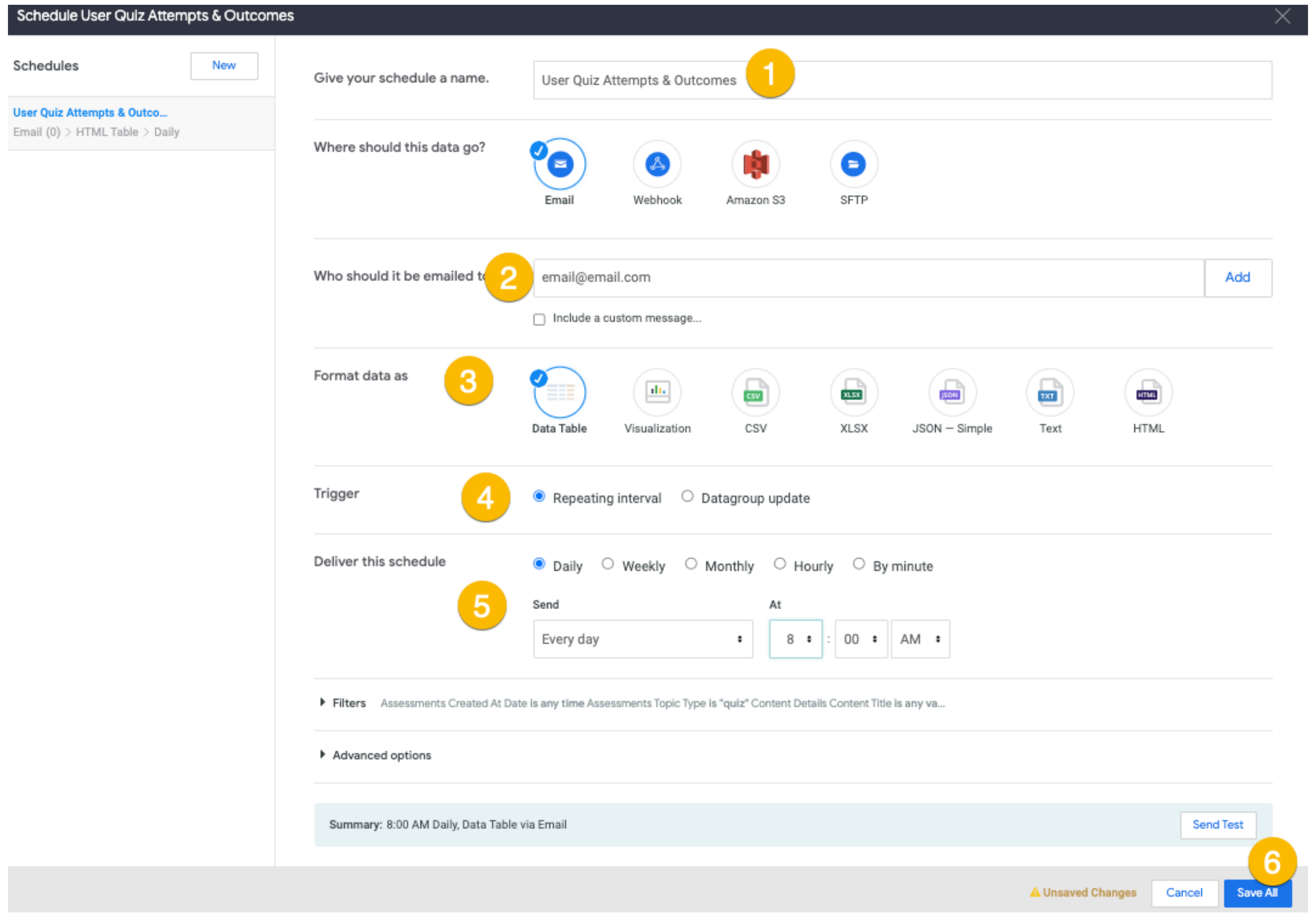
✓ Choose how you would like to have the data provided.

✓ Leave the trigger set to interval.

✓ Choose how frequently you would like your report, including delivery time.

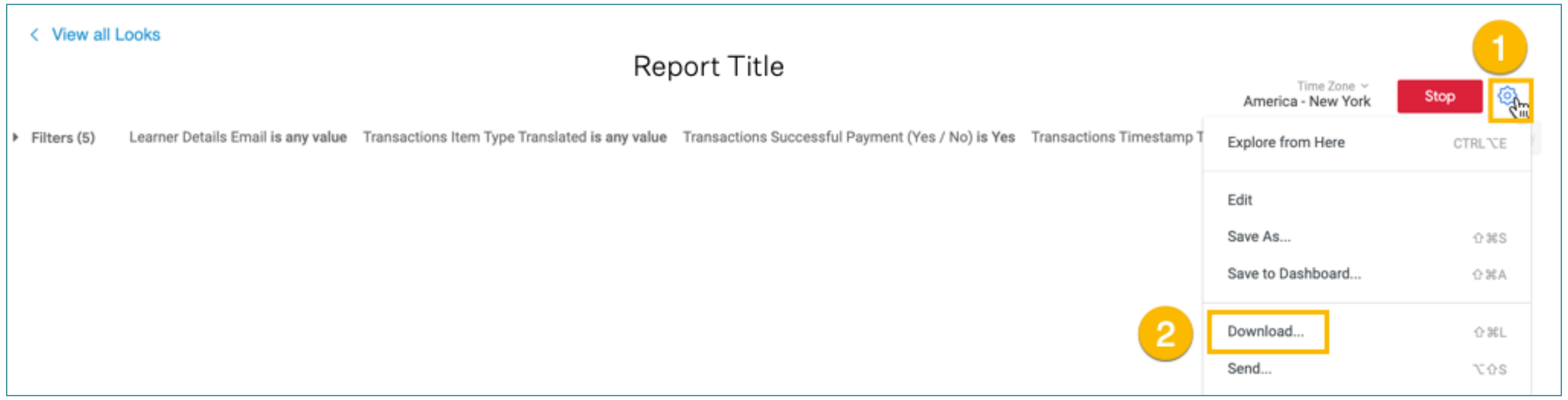
✓ Chose "save all."





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

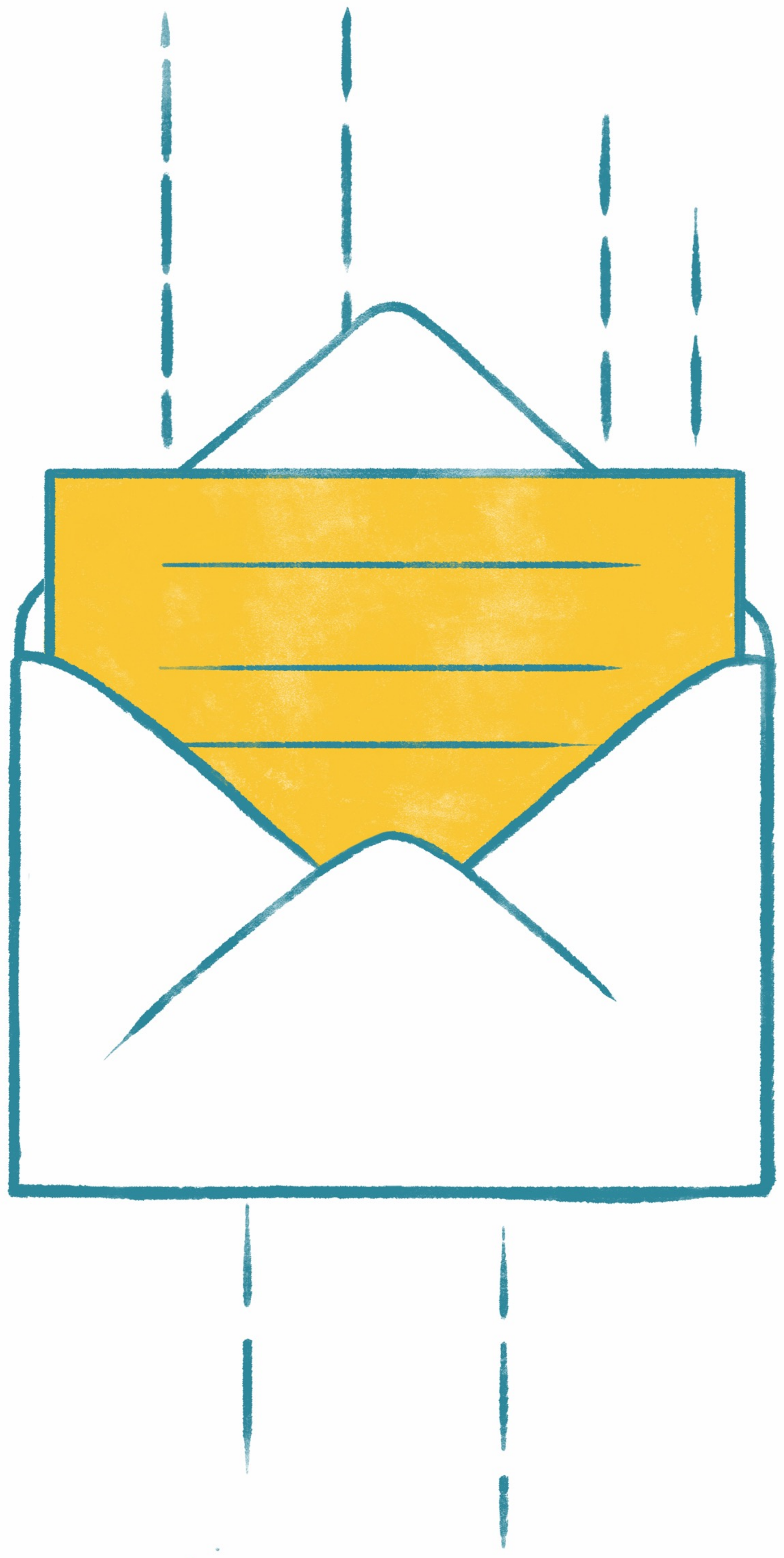
Contact Us!

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

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

Framework®™