



HOUSING  
PARTNERSHIP  
NETWORK

# HPN Member Report

## Knowledge Center

January 2019  
Housing Partnership Network

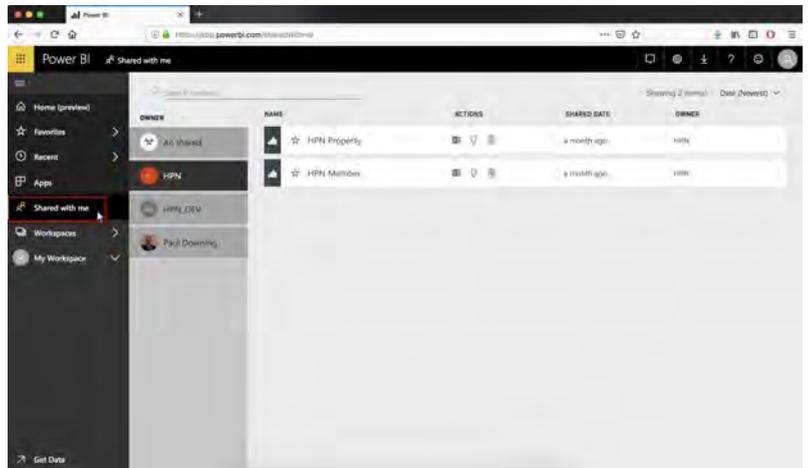
# Table of Contents

- 1. Member Report 3
- 2. Get a better view of the report 4
- 3. HPN Member Report Pages Summary 5
- 4. Basic Member 8

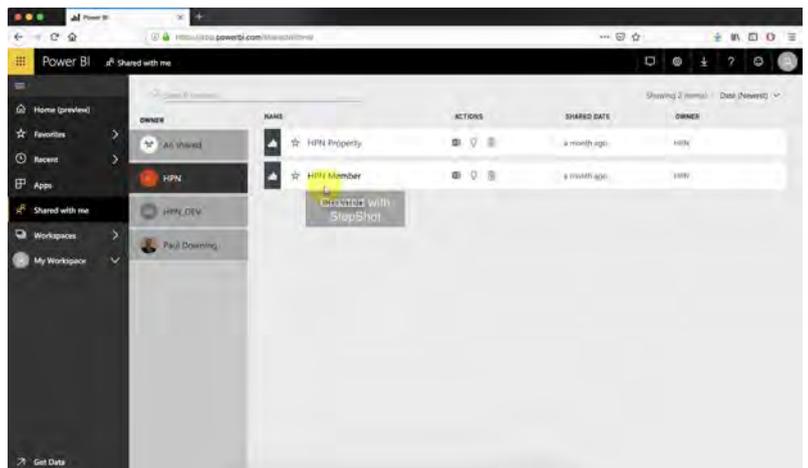
# Member Report

## Launch HPN Member Report

To launch the member report, go to [www.hpnc.com](http://www.hpnc.com). Then, click on "Shared with me"



The HPN member report provides access to all HPN member data.

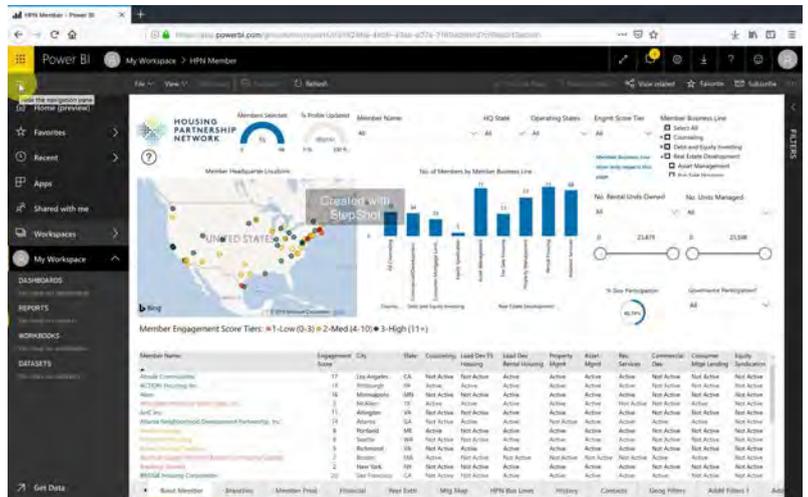


Note: HPN member data is still entered and stored in Salesforce. Salesforce will remain our day-to-day system for operational needs. KC provides enhanced visualization and analytical functionality, including the ability to quickly and easily filter member data.

# Get a better view of the report

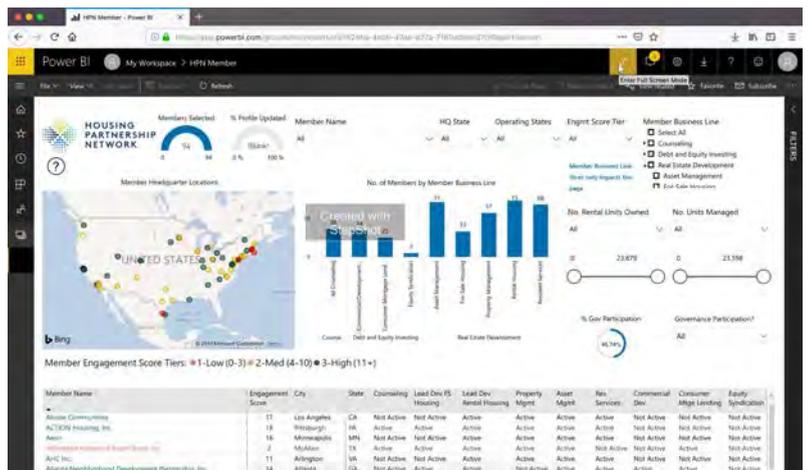
## Hide the navigation menu

*To hide the navigation menu, click on the hamburger icon on the left side.*



## Entering Fullscreen

*You can enter full screen mode by clicking on the double arrow on the top right corner of the webpage.*

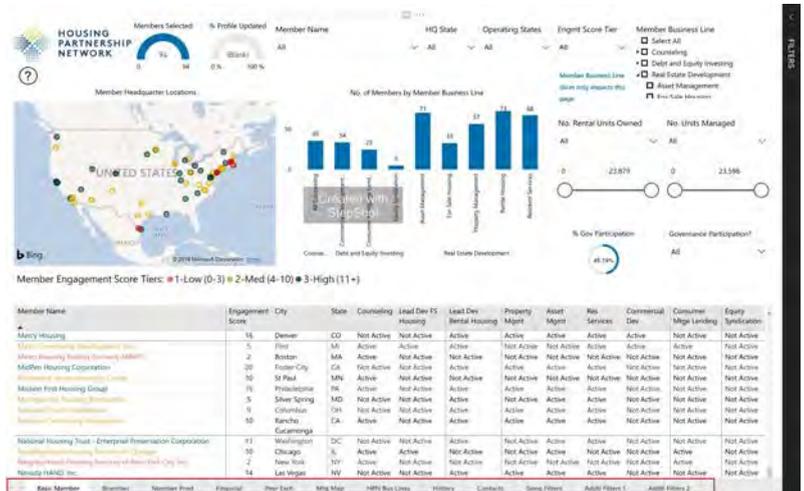


# HPN Member Report Pages Summary

## Member Report Pages

The member report has 12 pages:

- 1- Basic Member
- 2- Branches
- 3- Member Prod (Production)
- 4- Financial
- 5- Peer Exch (Exchange)
- 6- Mtg (Meeting) Map
- 7- HPN Bus Lines
- 8- History
- 9- Contacts
- 10- Geog (Geography) Filters
- 11- Addtl Filters 1
- 12- Addtl Filters 2



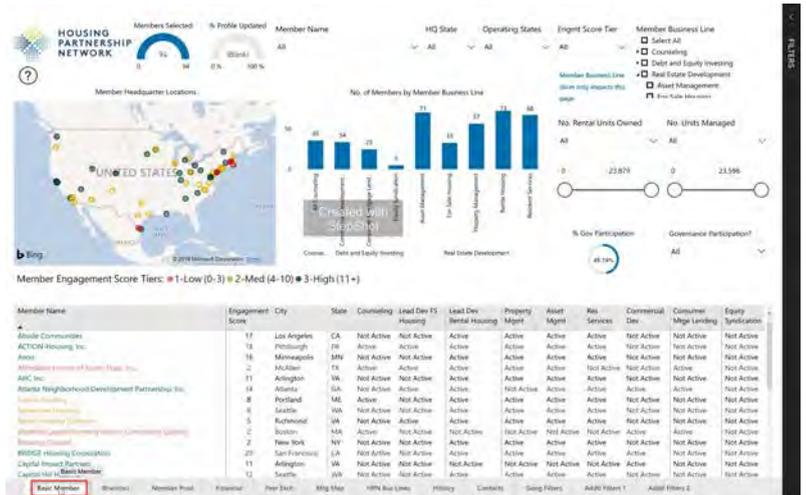
The previous version of the report included 8 pages. You might see the old version of the report in some of the steps throughout this guide.

# 1- Basic Member

This page contains high-level member info on business lines & location

You can preform basic filtering on member business lines, location, engagement, and rental units

owned/managed. You can also see a map of member HQs across the country.



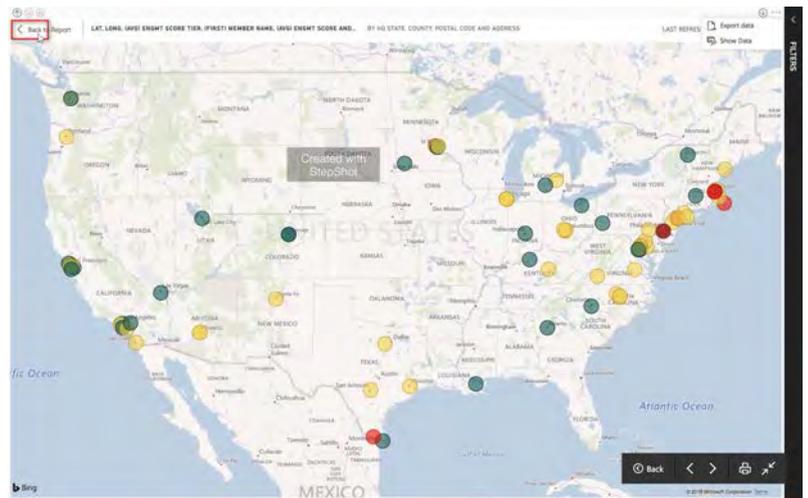
# Focus Mode

Focus mode lets you expand (pop out) a dashboard tile or report visual to see more detail. Maybe you have a dashboard or report that is a little crowded and you want to zoom in on only one visual. This is a perfect use of focus mode.

While in focus mode, you can interact with any filters that were applied when this visual was created.



When clicking on focus mode for the map, it will open and fill the entire canvas. To exit Focus mode, select **Back to Report**.



# Basic Member

## Member Gauge

On the top left corner of the basic member page, you will find two member gauges. The first one shows the number of members selected by your current filters, and the second gauge shows your the percentage of those members who have updated their HPN member profiles for the current year.



As you make specific selections, the gauge (along with other filters and tiles) will reflect the selections.

When the % Profile Updated gauge is blank (at 0%), that means that no members have filled out their profile yet for the calendar year. As members start to fill out their profiles in late Q1/early Q2, this gauge will increase.



# Member Engagement Score

All HPN members are categorized in three different colors to reflect their member engagement score with HPN.

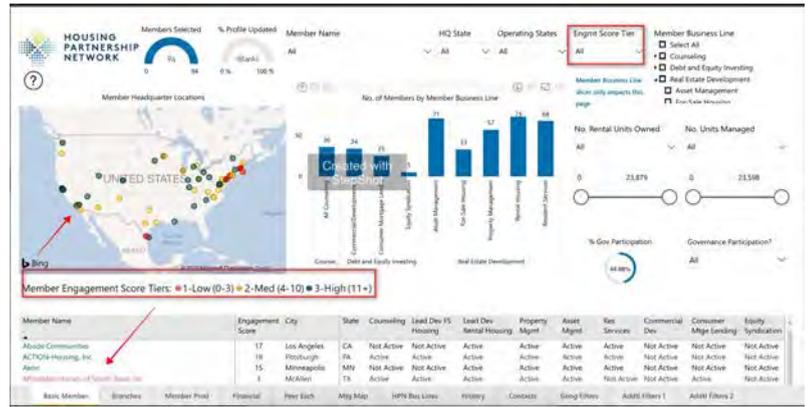
The member's name and mark on the map will always be color-coded according to their score.

## Member Engagement Score Tier:

Green - High (+11)

Yellow - Medium (4 - 10)

Red-Low (0-3)



## Question Icon

Question icons may be found on the left side of several pages across the report. You can click on the question mark icon to get information on updates/changes as it relates to the page.



## 2- Branches

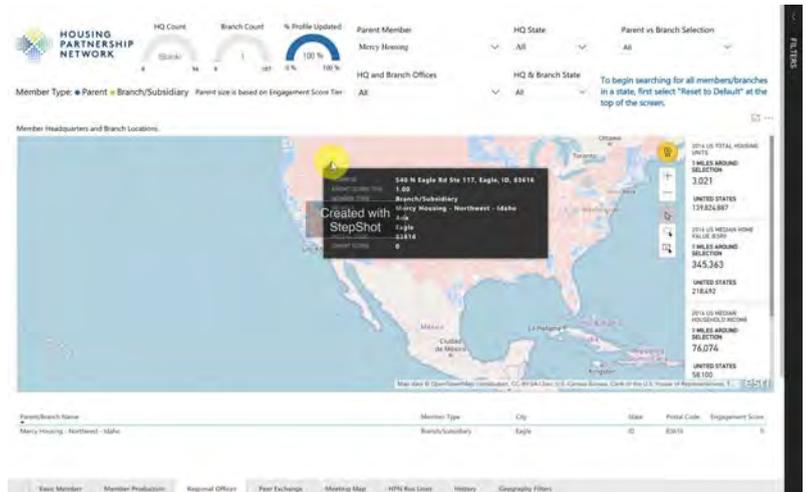
*This page contains a map of all member offices headquarters and its branches. You can see the full spectrum of member office presence across the US.*



*The Branches page was previously referred to as "Regional Offices"*

## Map Tooltips

*When you hover over one of the properties, you can see more information about the branch.*

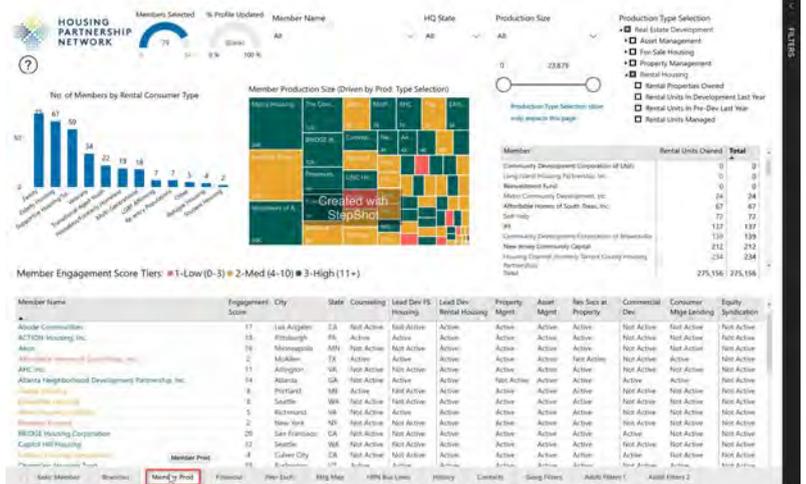


### 3- Member Production

This page contains detailed member production data with a pick-one filter.

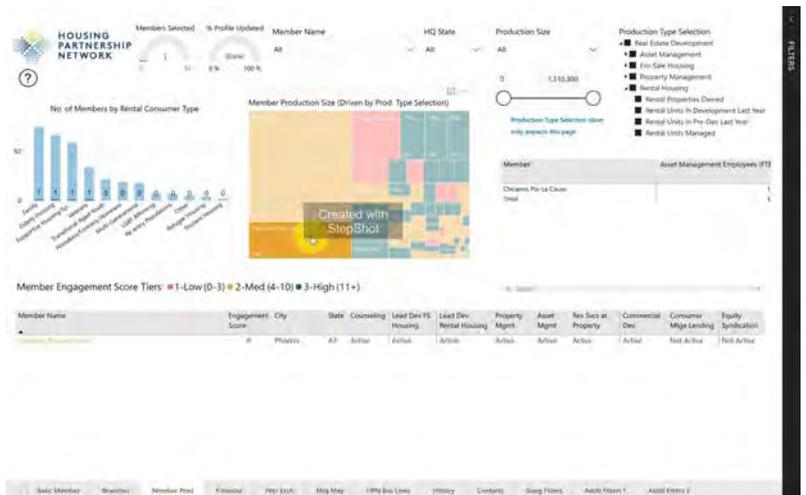
You can use this page to sort members based on production size and see current member production data (e.g., rental units owned, value of commercial loans closed last year).

The hierarchical filter in this page "Production Type Selection" will not carry through to other pages.



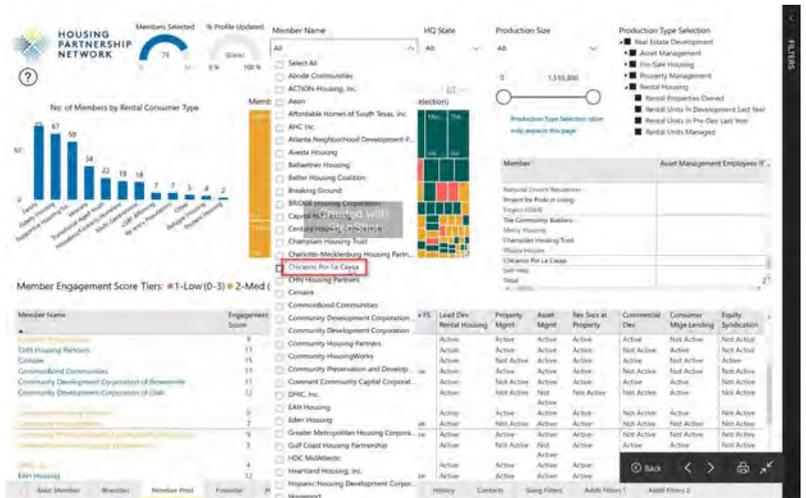
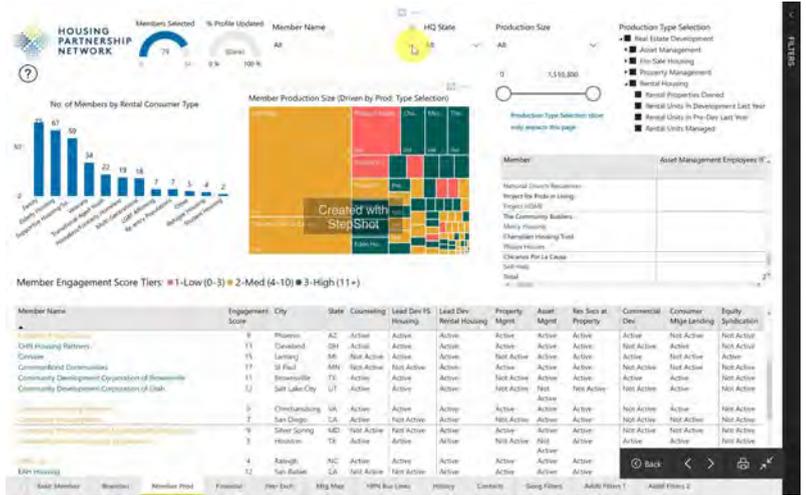
### Highlighting vs. Filtering

If you click on any of the data presented in the visuals (graphs, tree map, etc...), it will filter all the information in the page to reflect the selection. This action is called **highlighting**. To select more than one data point through highlighting, you can hit Ctrl.

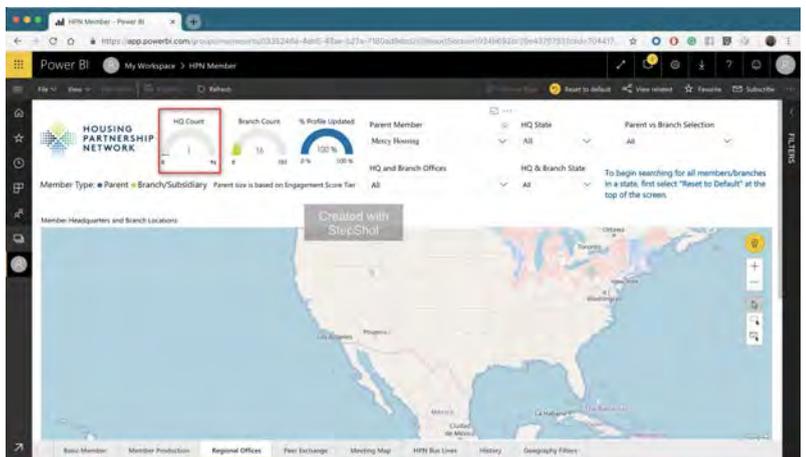


# Filtering

If you want your selection to save and carry over to additional pages of the report, you must use a filter rather than selecting on something (highlighting) in a visual or table.



Filtering saves your selection and carries it over to any other page in the report.



## Click on "Reset to default"

To clear ALL selections made in the report, you can click on the "Reset to default" function.



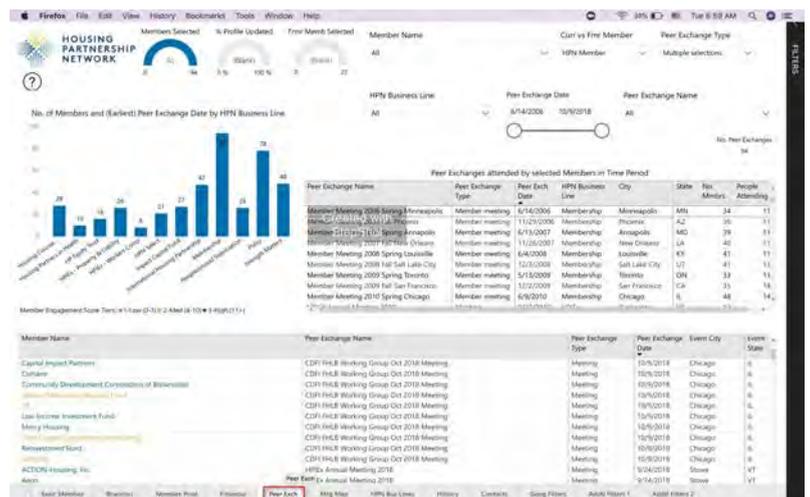
## 4- Financial

The financial page allows you to see and filter by HPN's members' key financial data, such as consolidated expenses, revenue, and net assets.



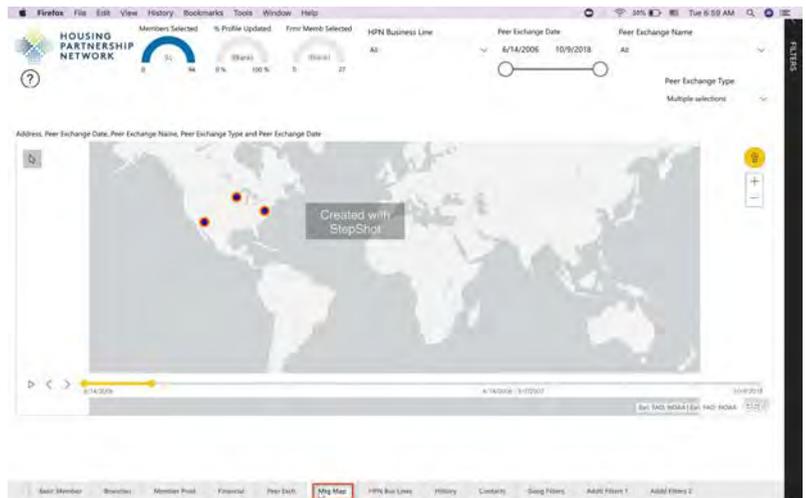
## 5- Peer Exchange

This page contains information on which members have attended which meetings over time. You will find member meeting participation since 2006 and business line meeting participation since 2011.



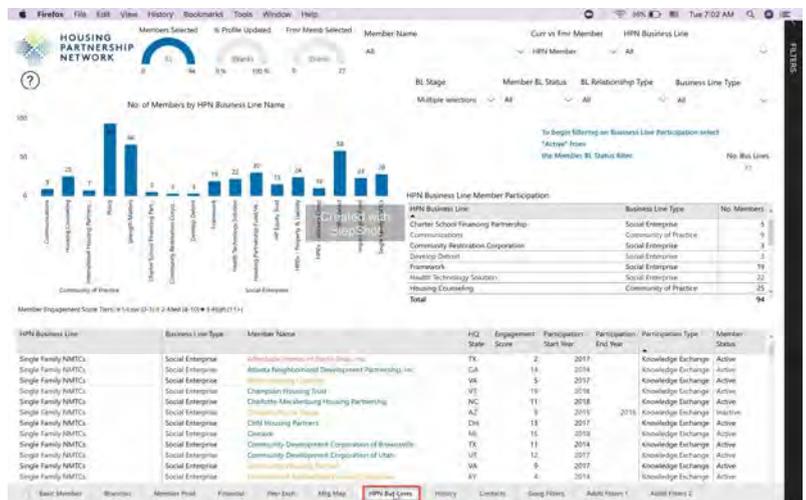
## 6- Meeting Map

*This page contains a time lapse slideshow of meeting locations over time.*



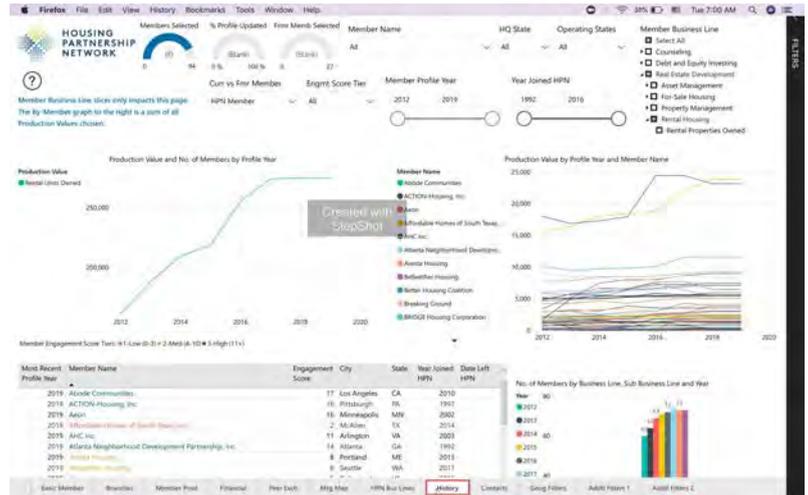
## 7- HPN Bus Lines

*This page contains a graph and tables of HPN Business Line Participation by Members. In here, you can analyze the members in your business line or prospect members not in your business line. You can see which members are involved in which businesses and since when. You can also filter by BL Stage, such as whether the social enterprise is a start-up, mature business, etc.*



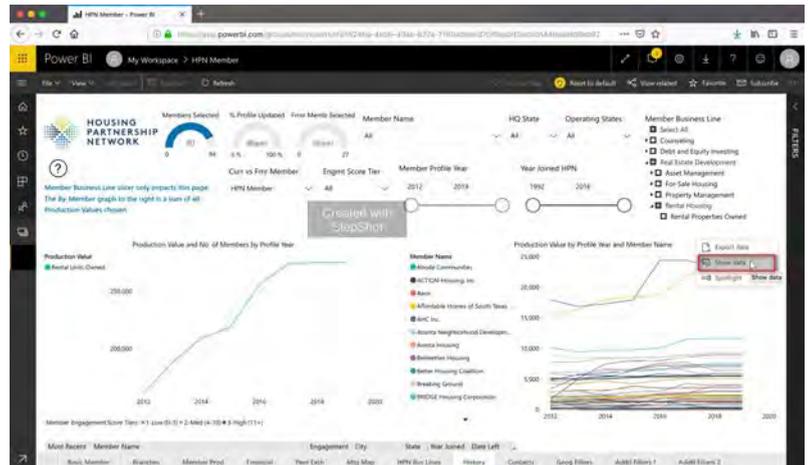
## 8- History

The history page has a compilation of member profile data from 2012-2018. This page is useful if you are trying to see how member business lines and production data have changed over time.

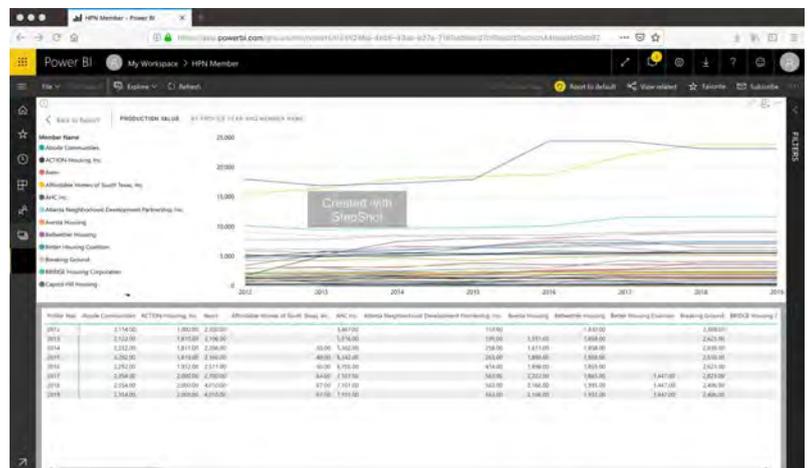


## Click on "Show data"

For larger graphs, you can hover over the visual to see specific data points, or you can click on "show data" to get an expanded view.



When you select **Show Data**, Power BI displays the data below (or next to) the visualization and gives you a larger view of the chart/visual.



## 9 - Contacts

*In this page, you can see all staff contacts for whatever set of members you have filtered. You can refine the list further to get contacts within specific Communities of Practice or job types (CEO, CFO, etc.).*

The screenshot displays the 'Contacts' report in the Housing Partnership Network system. At the top, there are navigation tabs: Basic Member, Branches, Member Profile, Financial, Peer Info, My Map, HP's Bus Lines, History, **Contacts**, Org Filters, Add'l Filter 1, and Add'l Filter 2. The main content area shows a table of member data with columns for Member, Primary Contact, First Name, Last Name, Nickname, Title, CEO, CFO, and Date. A 'Contact Multiselect' dropdown menu is open, showing options: Select All, Business Line Contact For, Communities of Practice, and Executive Job Category. The 'Contacts' button in the bottom navigation bar is highlighted with a red box.

## 10- Geography Filters

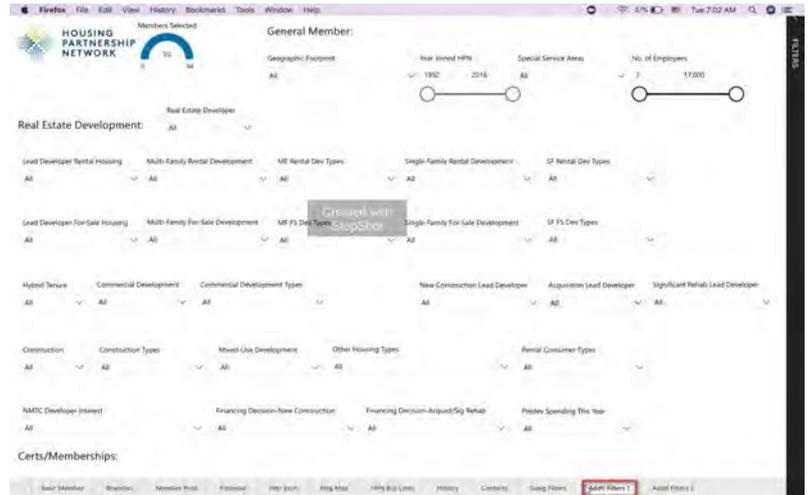
*This page contains Geographic filters to filter by region and metro area across all pages of the report. These filters will help you see members headquartered by US region or metro area. You can use the country map to see the location(s) of the geographic filters that you have selected.*

*Note: Must navigate back to other report pages to see impact of these filters.*

The screenshot shows the 'Geography Filters' page in the Housing Partnership Network system. At the top, there are navigation tabs: Basic Member, Branches, Member Profile, Financial, Peer Info, My Map, HP's Bus Lines, History, Contacts, **Geography Filters**, Add'l Filter 1, and Add'l Filter 2. The main content area features a map of the United States with a 'Created with StepShot' watermark. To the right of the map are several dropdown menus for filtering: Geographic Region (Census Region), Geographic Sub-Region (Census Division), Combined Statistical Area (mult. combined MSAs), Core-Based Statistical Area (MSAs plus micropolitan areas), Operating States, HQ State, and County Name. The 'Geography Filters' button in the bottom navigation bar is highlighted with a red box.

## 11- Additional Filters 1

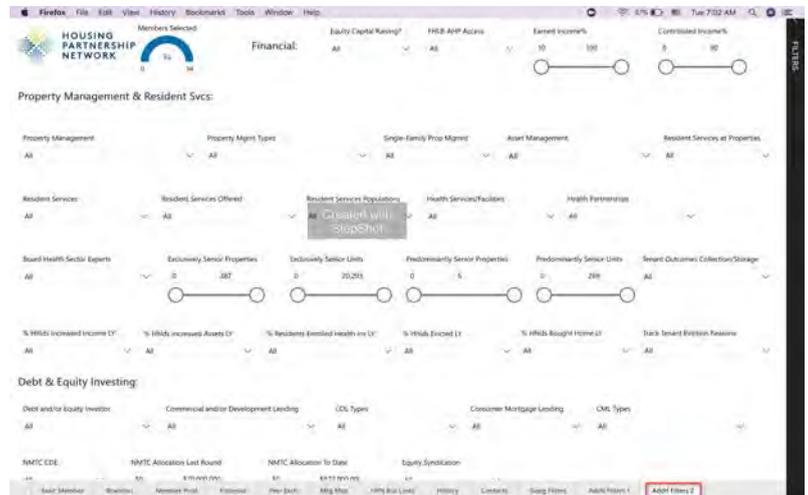
The last two pages of the report, *Additional Filters 1* and *2*, allows you to filter members based on any collected data, such as *Certifications/Memberships*, *Types of Resident Services Offered*, and *NMTC allocation*.



Please refer to the data dictionary if you need assistance with use of these filters.

## 12- Additional Filters 2

Note: Must navigate back to other report pages to see impact of these filters.



## Click on "Export this report as a PowerPoint presentation"

*You can export the entire member report into a powerpoint presentation.*

*However, please note that any selections/filters that you make on the report will not be reflected in the Powerpoint presentation (the default filters/settings are exported to PowerPoint). The exported images are vector files, meaning you can enlarge them without pixelation/graininess.*

