

# HPN Property Report Knowledge Center

January 2019 Housing Partnership Network

### **Property Report**

#### HPNKC.COM

To access the Knowledge Center (KC), please go to <u>hpnkc.com</u>



#### KC/Power BI Landing Page

Once you enter this page, you will see three reports under the "Shared with me" tab in the navigation menu: HPN Membership Profile History, HPN Property, and HPN Member.

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#### Click on "HPN Property"

The HPN property report provides access to property data for all members that own or manage rental housing.



Note: HPN property 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 property data.

# How to get a larger view of the report

To get a larger view of the report you can: 1- Click on the Hamburger Icon on the left side to hide the navigation bar



2- Click on the Fullscreen Arrow to enter into a full screen mode

#### Export report as a PowerPoint presentation

You can export the entire property 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.

## **Property Pages**

#### **Basic Property**

The first page you will see is the Basic Property page. Here, you can find general property data for all members that own rental housing



Please note that the total number of members in the property report may not equal the total number of HPN members. This is because not all HPN members own or manage properties. In this case, we have 71 HPN members out of 94 that reported that they own or manage properties.

On the upper left corner, you can see **% Total HPN members**, which shows you the percentage of the total HPN members in the report and **Members Selected** gauge which shows the number of members who own/manage rental properties. In the bottom of the Basic Property page, you will find a table with more information on the members. This allows you to easily see the member business line info without having to travel to

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the Member Report to find out what the filtered members do (rental development, for-sale, property management, etc.).

#### **Dynamic Pages**

All report pages are dynamic. The filters you select will be applied to your entire report. For example, as you make specific selections, you will



see the numbers of the three slicers on the top left corner adjust to reflect those selections.

#### Dynamic Page: Example

For example: When clicking on "Aeon" from the Member Name filter, the report automatically changes to reflect this selection. Member selected shows 1, the

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table shows only the properties that belong to the member, and the map highlighted the states where the member has units owned or managed.

#### **Property State**

Property State refers to the State where a property is located.



#### **Question mark icon**

Click on the **question mark icon** to get more information on any changes and updates to the report.



#### 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.



#### **Focus Mode**

When clicking on focus mode for the map, it will open and fill the entire canvas. While in focus mode, you can interact with any filters that were applied when this visual was created.



To exit Focus mode, select **Back to Report**.

#### Geographic Hierarchies

Maps have geographic hierarchies. You can use the drill down (or drill up) button to view the properties



at a different geographic level, e.g., state, city, zip, etc.

For example, the default view is to see the properties grouped by state



After clicking on drill down 2 times, you can see the properties grouped by zip code.



#### Member Engagement Score

All HPN members are categorized in three different colors to reflect their member engagement score with HPN. The members name will always be color-coded according to their score.



Member Engagement Score Tier:

Green - High (+11) Yellow - Medium (4 - 10) Red - Low (0 - 3)

#### Click on "Spotlight"

To highlight one of the tiles, you can click on **spotlight**.



#### Exiting "Spotlight" Mode

To exit the spotlight mode, simply click anywhere outside the tile.



#### Units/Properties Owned vs. Managed

The filter **Units/Props Owned vs Managed** allows you to filter the properties and units in several ways:



All: You can see all
units/props that belong to a member
Manage: units/props that members manage only
Own: units/props that members own only
Own and Manage: units/propers that a member owns and manages

#### **Property Point Map**

The second page, **Property Point Map**, includes the location of each member property color-coded by engagement tier.



This page allows you to see

the location of each member property across the country at varying geographic hierarchies (state, county, city, zip, address) color-coded by member engagement tier

#### Example

For example, if you click on "Aeon" the map will zoom to the state that has Aeon properties and the table will show you all properties where Aeon is either a manager or an owner.



#### Map Tooltips

When you hover over one of the properties, you can see more information about the property including the name, number of units and location.



#### Highlight vs. Filter

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.

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#### 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.





#### Detailed Property Table

The third page, Detailed Property table, includes expanded information on member properties designed for sorting or export to Excel.

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#### To Export Data

Click one the three dots

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#### **Geographic filters**

Geographic filters allows you to filter by region and metro area across all pages of the report



You can use this page if you want to see member

properties by US region or metro area. (Note: Must navigate back to other report pages to see impact of these filters.)

#### **Property Filters**

Property Filters page allows you to filter properties based on any collected data, such as Construction Type, Primary Occupancy Type (target population), and Year Constructed. (Note: Must



navigate back to other report pages to see impact of these filters.)

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

#### **HPN Bus Line Filters**

This page allows you to filter properties based on HPN business line participation – whether the MEMBER participates in an HPN business line (e.g., Select) or whether the PROPERTY is

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associated with an HPN business line (e.g., insured by HPIEx).

After selecting the HPN Business Line, use **Member BL Status** to select only the active members in the business line.

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### Click on "Reset to default "

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

