



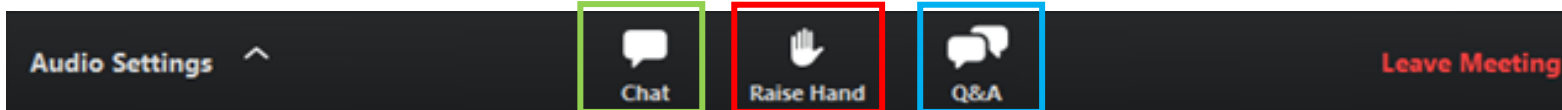
# **I inherited a messy hub... now what?**

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February 24, 2022

# Using the webinar controls

## Windows/Mac



Raise Hand to get the instructor's attention

Chat to the instructor to ask a question or make a comment

Q&A is usually used in large meetings, when lots of questions need to be prioritized

## Mobile device



## Sherry Stanton

Director, Center of Excellence

- 5+ Years at FranConnect
- 35+ years in software implementation and training
- Subbing in for Frank Menger

# Recording Provided

- This training will be recorded
- You'll be sent a link to view the recording at any time

franconnect

Solutions Platform Overview Resources About Contact Us

REQUEST A DEMO

## On Demand Courses

franconnect

**GET YOUR DATA STRAIGHT**  
SPRINGBOARD TO SUCCESS SERIES

**DATA**

**SESSION ONE**

**Session One: Get Your Data Straight**

- 01 The five critical pieces of information you should be keeping
- 02 How to check the quality of your current information
- 03 Recommendations for updating that information

*\*Recorded 9/17/2021*

**DOWNLOAD WORKBOOK**

# Springboard to Success-Engage

February 2022

I inherited a messy  
hub...where do I start?



# AGENDA

You've inherited a Hub instance, and you don't know how well it's been maintained or if people are using it. In this session, we'll talk about

1. Discovering which documents are used most frequently
2. Determining how well your search capability functions
3. Discovering which documents haven't been updated recently

## *Springboard Take-Aways:*

*Analyze your Hub usage logs to see what's working and what could use some help.*

# MONITORING HUB USAGE


The screenshot displays the FranConnect Admin interface. At the top, there is a navigation bar with the FranConnect logo, a search bar, and a user profile dropdown for 'FranConnect Administrator'. A red box highlights the 'Access Control' link in the top navigation bar, and another red box highlights the 'Settings' gear icon. A large red arrow points from the 'Access Control' link to the 'Access Control' section on the left sidebar. The 'Access Control' section is titled 'Access Control' and includes a description: 'Manage logs for actions performed, define users roles and permissions and modifications made in different entities of the system. You can set filter parameters to view log reports corresponding to the desired criteria.' Below this, there are two columns of log categories, each with a description and a link to view the logs. A red box highlights the 'Library Logs' and 'News Logs' categories in the bottom left column.

**Access Control**




Manage logs for actions performed, define users roles and permissions and modifications made in different entities of the system. You can set filter parameters to view log reports corresponding to the desired criteria.

- ❖ [Roles](#)  
Define user roles and associate privileges with them.
- ❖ [User Status Logs](#)  
View status logs for system users for a defined duration.
- ❖ [Deleted Logs](#)  
View detailed records of deleted entries for a defined duration.
- ❖ [Form Generator Logs](#)  
View logs of activities done through Form Generator.
- ❖ [Tab Generator Logs](#)  
View logs of activities done through Form Generator for Tabs.
- ❖ [Library Logs](#)  
View download details of specific library documents.
- ❖ [News Logs](#)  
View records of news items downloaded by various users.
- ❖ [User Account Summary](#)  
View account details of all user categories for a selected duration.
- ❖ [Login Logs](#)  
View detailed login reports of various system users for a selected duration.
- ❖ [Export Logs](#)  
View records of system exports in a selected duration.
- ❖ [Web Form Generator Logs](#)  
View logs of activities done through Web Form Generator.
- ❖ [Visit Form Logs](#)  
View logs of changes made in Visit Form in a given duration.
- ❖ [The Hub Searched Logs](#)  
View records of searches performed by different system users on The Hub module.

# What documents are popular?



All

 FranConnect Administrator

Admin > Access Control > Library Documents Logs

Fields marked with \* are mandatory.

From Date

To Date

User Name

Document Title

01/15/202102/15/2022All Selected

Search

### LIBRARY LOGS REPORT

Items 1 - 20 of 48 | First | Prev | 1 | 2 | 3 | Next | Last

User Name	Document Title	Folder Name	No. of Download	Last download Date	IP Address
FranConnect Administrator	Video	HR	4	02/10/2022	71.163.164.79
FranConnect Administrator	Video	HR	4	02/10/2022	71.163.164.79
FranConnect Administrator	Video	HR	4	02/10/2022	71.163.164.79
FranConnect Administrator	Getting Started Guide	Branding and Marketing	1	02/04/2022	71.163.164.79
FranConnect Administrator	Re-Opening Guidance_Modified	Recovery	20	02/04/2022	71.163.164.79
FranConnect Administrator	Sunrise w Font	.SUNRISE FLYERS	3	12/08/2021	162.221.27.234
FranConnect Administrator	Sunrise Drop-Off	.SUNRISE FLYERS	1	12/08/2021	162.221.27.234
FranConnect Administrator	FastFacialForm	Bio-Dispoz	1	11/18/2021	162.221.27.234
COO Executive	Operations Manual Overview	Operations	4	10/26/2021	2600:1700:9de1:12e0:2925:1673:9e4fb144
FranConnect Administrator	2018 Product Brochure	Brochures	8	10/06/2021	103.77.1.207
FranConnect Administrator	Budgeting Worksheet	Operations	18	10/05/2021	100.36.35.227
FranConnect Administrator	Sales presentation	Sales	13	10/01/2021	2600:1700:9de1:12e0:618c:9773:9e4fb144
FranConnect Administrator	New Overview	Marketing	9	10/01/2021	2600:1700:9de1:12e0:618c:9773:9e4fb144
FranConnect Administrator	Operations Manual Overview	Operations	9	10/01/2021	2600:1700:9de1:12e0:618c:9773:9e4fb144
SMB Executive	Ops Manual - Word	Operations	1	09/30/2021	98.168.251.101
SMB Executive	Operations Manual Overview	Operations	4	09/30/2021	98.168.251.101
FranConnect Administrator	VA primary logo - 2 color - no tagline	Human Resources	1	09/28/2021	223.177.132.214
CEO Executive	Operations Manual Overview	Operations	7	09/23/2021	2409:4064:91c:7ff9:b97a:16c8:c3e9:b288
CEO Executive	SBA Disaster Assistance	Recovery	36	09/23/2021	2409:4064:91c:7ff9:b97a:16c8:c3e9:b288
CEO Executive	Ops Manual - Word	Operations	3	09/23/2021	2409:4064:91c:7ff9:b97a:16c8:c3e9:b288

Print

Export As Excel

Back



## DO A LITTLE CLEANUP ON THE EXCEL FILE

- Convert No. of Downloads to a number by highlighting the column and clicking the error icon. Choose “Convert to Number”.
- Convert dates that look like text by doing a search and replace (Ctrl-E-E), and replacing the / character with itself.

	A	B	C	D	E	F
1	Library Logs Report					
2						
3	Library Logs					
4	User Name	Document Title	Folder Name	No. of download	Last download Date	IP Address
5	Abigail Duncan	NY-07 Tier 4	Tier 4	2	01/11/2022	73.49.19.16
6	Abigail Duncan	NY-07 Tier 4	Tier 4	2	01/11/2022	73.49.19.16
7	Abigail Duncan	NY-07 Tier 4	Tier 4	2	01/11/2022	73.49.19.16
8	Abigail Duncan	NY-07 Tier 4	Tier 4	2	01/11/2022	73.49.19.16
9	Abigail Duncan	2021 VA-01 Tier 3	Tier 3	2	01/11/2022	73.49.19.16
10	Abigail Duncan	2021 VA-01 Tier 3	Tier 3	2	01/11/2022	73.49.19.16
11	Abigail Duncan	2021 VA-01 Tier 3	Tier 3	2	01/11/2022	73.49.19.16
12	Abigail Duncan	VA-01 Tier 3 Separ	Tier 3	7	01/11/2022	73.49.19.16
13	Abigail Duncan	VA-01 Tier 3 Separ	Tier 3	7	01/11/2022	73.49.19.16
14	Abigail Duncan	VA-01 Tier 3 Separ	Tier 3	7	01/11/2022	73.49.19.16
15	Abigail Duncan	2021 NJ-02 Tier 3	Tier 3	7	01/11/2022	73.49.19.16
16	Abigail Duncan	2021 NJ-02 Tier 3	Tier 3	7	01/11/2022	73.49.19.16

Find and Replace

Find Replace

Find what: /

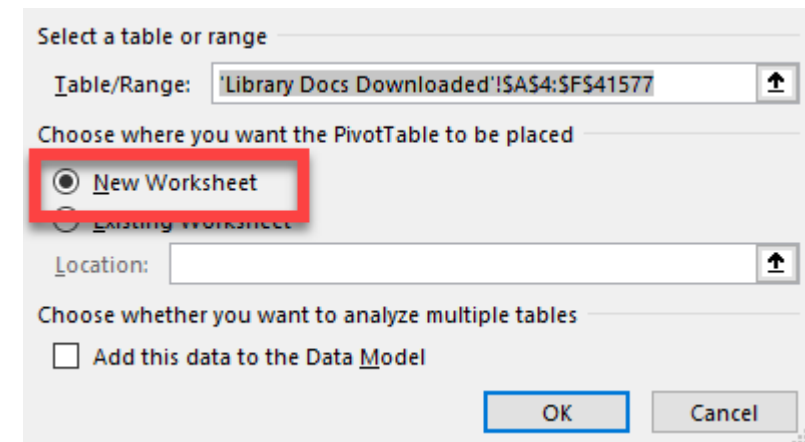
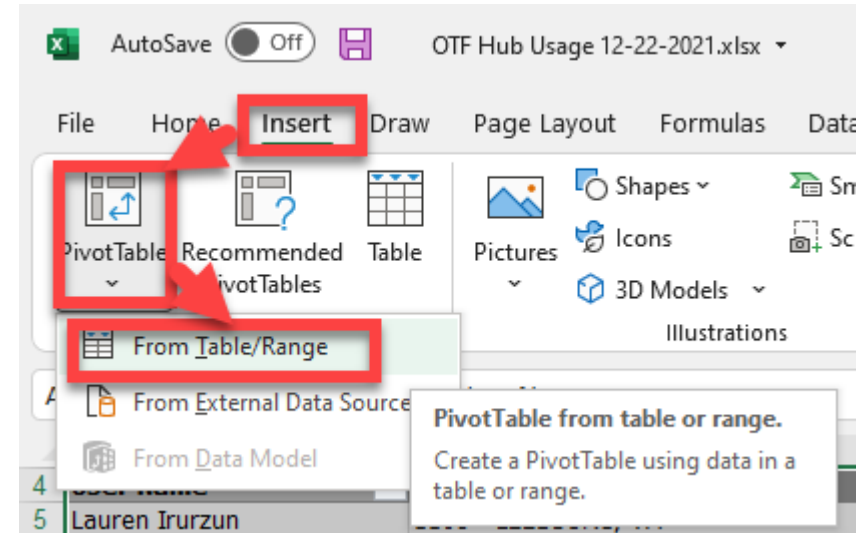
Replace with: /

Options >>

Replace All Replace Find All Find Next Close

# PIVOT!

- Highlight the table from the headers down, and choose Insert > Pivot Table > From Table/Range.
- Choose to put your results into a new worksheet.



# FINDING THE MOST DOWNLOADED DOCUMENTS

Drop Report Filter Fields Here

Sort (Document Title) ? X

Sort options

- ☐ Manual (you can drag items to rearrange them)
- ☐ Ascending (A to Z) by:  
Document Title
- ☒ Descending (Z to A) by:  
Document Title

Sum of No. of download

Count of User Name

PivotTable Fields

Choose fields to add to report:

Search

- ☒ User Name
- ☒ Document Title
- ☐ Folder Name
- ☒ No. of download
- ☐ Last download Date
- ☐ IP Address
- ☐ Quarters
- ☐ Years

More Tables...

Drag fields between areas below:

Filters

Columns

Σ Values

Rows

Σ Values

Document Title

Sum of No. of download

Count of User Name

Defer Layout Update

Update

Document Title	Sum of No. of download	Count of User Name
2021 Hell Week EOS Quantities	3184	1540
Facilities Guide - for 8-point SMS	1900	144
3 Class Session Bundle - Client Intake and Waiver (All States)	1840	260
Tier 1-4 Membership Freeze Form	1650	429
2021 Client Intake Form (all states)	1614	774

## When were files last downloaded?

- If a file hasn't been downloaded in a while, it might be out of date. Let's add Download Date to our Pivot table.
- It comes in as "count of date", which we don't want. Left-click on the field and choose "Value Field Settings". Choose "Max" as the summary option. Click OK.

Value Field Settings

Source Name: Last download Date

Custom Name: Max of Last download Date

Summarize Values By Show Values As

**Summarize value field by**

Choose the type of calculation that you want to use to summarize data from the selected field

Sum  
Count  
Average  
**Max**  
Min  
Product

Number Format OK Cancel

Choose fields to add to report:

Search

☒ User Name  
☒ Document Title  
☐ Folder Name  
☒ No. of download  
☒ Last download Date  
☐ IP Address  
☐ Quarters  
☐ Years  
More Tables...

Drag fields between areas

Filters

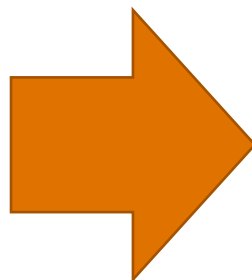
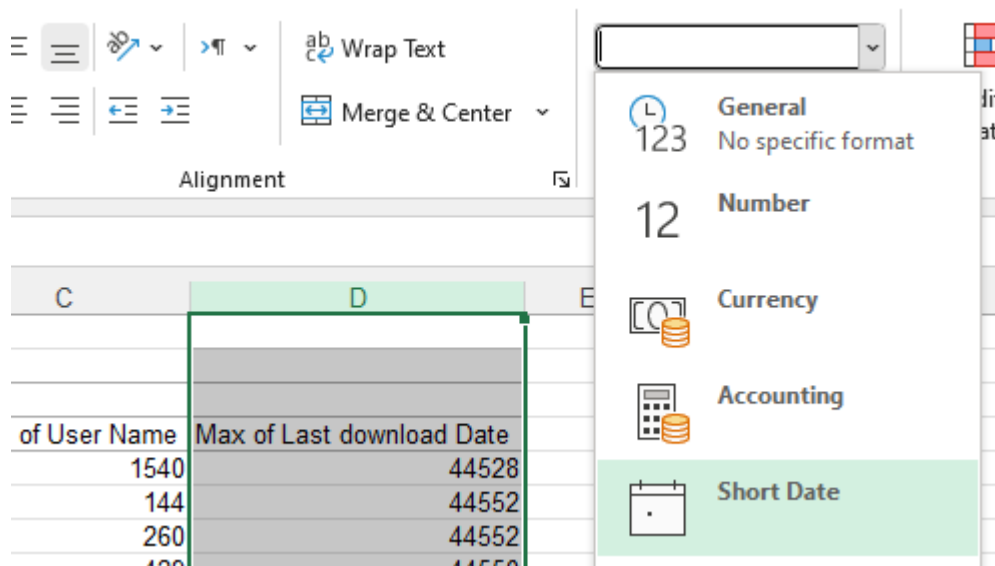
Rows

Document Title

Count of Last downloa...

Move Up  
Move Down  
Move to Beginning  
Move to End  
Move to Report Filter  
Move to Row Labels  
Move to Column Labels  
Move to Values  
Remove Field  
Value Field Settings...  
Count of Last downloa...

- The date shows up as a number, so let's correct that display. Highlight the column containing the date and change its display to Short Date.



Data		
Sum of No. of download	Count of User Name	Max of Last download Date
3184	1540	11/28/2021
1900	144	12/22/2021
1840	260	12/22/2021
1650	429	12/20/2021
1614	774	12/21/2021
1521	216	12/19/2021
1516	844	12/21/2021
1491	495	12/21/2021
1316	760	12/10/2021
1312	820	10/29/2021
1218	255	12/20/2021
1215	300	11/30/2021
1156	752	10/29/2021
1128	552	12/21/2021
1080	405	12/22/2021
1014	192	12/14/2021
1004	676	12/21/2021
880	204	12/21/2021



# CONFUSED BY PIVOT TABLES?

We have templates for the File and Search logs

1. Pull your log
2. Paste it into the tab that says "paste here"
3. Clean up the numbers and dates
4. Go to the Pivot Tables tab and press Alt-F5



# What are your users searching for, and do they find it?

All

Type and press enter

?

FA FranConnect Administrator

Admin > Access Control > Searched Logs

Searched Text

Searched Date

Search The Hub Logs

All

Search

SEARCHED LOGS

Items 1 - 15 of 15


Searched Text	Searched Date	Searched By	Searched Results	Item
new overview	09/30/2019 03:29 PM	FranConnect Administrator	1	All The Hub Items
sales presentation	09/30/2019 03:28 PM	FranConnect Administrator	1	All The Hub Items
sales manual	09/30/2019 03:28 PM	FranConnect Administrator	1	All The Hub Items
FIM_CAMPAIGN_DOCS	05/29/2019 08:25 PM	FranConnect Administrator	1	All The Hub Items
Georgia	04/11/2019 06:14 AM	Nick Mecozzi	1	All Intranet Items

Export As Excel

Print

Back

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Powered By: 

- Enter the time period for searches, one year is a good representation
- Choose search
- Export the result to an Excel file

The screenshot shows the FranConnect Admin interface. At the top, there's a header with the FranConnect logo and a search bar. Below the header, the breadcrumb trail reads "Admin > Access Control > Searched Logs". The main content area has two input fields: "Searched Text" with the placeholder "Search The Hub Logs" and "Searched Date" with a dropdown menu set to "Last 12 Months". A red box highlights the "Searched Date" dropdown, and another red box highlights the "Search" button. A red arrow points from the "Search" button to the "Export As Excel" button at the bottom of the page. The "Export As Excel" button is also highlighted with a red box. Below the search fields, there's a section titled "SEARCHED LOGS" with a table. The table has two columns: "Searched Text" and "Searched Date". The first row of data shows "COVID" in the "Searched Text" column and "02/16/2022 05:36 AM" in the "Searched Date" column. At the bottom of the page, there are three buttons: "Export As Excel", "Print", and "Back".

Admin > Access Control > Searched Logs

Searched Text  
Search The Hub Logs

Searched Date  
Last 12 Months ▼

Search

**SEARCHED LOGS**

Searched Text	Searched Date ▼
COVID	02/16/2022 05:36 AM

Export As Excel Print Back

## DO A LITTLE CLEANUP ON THE EXCEL FILE

- Convert No. of Downloads to a number by highlighting the column and clicking the error icon. Choose “Convert to Number”.
- Convert dates that look like text by doing a search and replace (Ctrl-E-E), and replacing the / character with itself.

	A	B	C	D	E	F
1	Library Logs Report					
2						
3	Library Logs					
4	User Name	Document Title	Folder Name	No. of download	Last download Date	IP Address
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7	Abigail Duncan	NY-07 Tier 4	Tier 4	2	01/11/2022	73.49.19.16
8	Abigail Duncan	NY-07 Tier 4	Tier 4	2	01/11/2022	73.49.19.16
9	Abigail Duncan	2021 VA-01 Tier 3	Tier 3	2	01/11/2022	73.49.19.16
10	Abigail Duncan	2021 VA-01 Tier 3	Tier 3	2	01/11/2022	73.49.19.16
11	Abigail Duncan	2021 VA-01 Tier 3	Tier 3	2	01/11/2022	73.49.19.16
12	Abigail Duncan	VA-01 Tier 3 Separ	Tier 3	7	01/11/2022	73.49.19.16
13	Abigail Duncan	VA-01 Tier 3 Separ	Tier 3	7	01/11/2022	73.49.19.16
14	Abigail Duncan	VA-01 Tier 3 Separ	Tier 3	7	01/11/2022	73.49.19.16
15	Abigail Duncan	2021 NJ-02 Tier 3	Tier 3	7	01/11/2022	73.49.19.16
16	Abigail Duncan	2021 NJ-02 Tier 3	Tier 3	7	01/11/2022	73.49.19.16

Find and Replace

Find Replace

Find what: /

Replace with: /

Options >>

Replace All Replace Find All Find Next Close

## VIEW YOUR RESULTS

- View your results, and consider adding these terms to document descriptions

	A	B	C
1	<b>What are people searching for?</b>		
2			
3	Press Alt- F5 to refresh	Sort A-Z to find similar terms near each other	
4			
5			
6			
7			
8		Data	
9	Searched Text	Max of Searched Date	Count of Searched Results
10	COVID	2/16/2022	1
11	finance	10/22/2021	1
12	kitchen	4/1/2021	1
13	no color	9/24/2021	1
14	no tagline	9/24/2021	1
15	opeerations	3/24/2021	1
16	Operations	8/18/2021	1
17	Operations Manual Overview	10/27/2021	1
18	(blank)		
19	Grand Total	2/16/2022	8
20			
21			



# How current, and how searchable are YOUR documents?

The screenshot displays the FranConnect Library interface. At the top, there's a navigation bar with the FranConnect logo, a search bar, and user information (FranConnect Administrator). Below the navigation bar, the left sidebar shows a 'FOLDER' list with options like Home, Index, .SUNRISE FLYERS, Area Developer Toolkit, Branding and Marketing, HR, Human Resources, Marketing, Opening Documents, Operations, Recovery, Sales, and Vendor Information. The main area is titled 'INDEX' and features a filter section with 'Document Type' (All), 'Document Subtype' (All), and 'Sort By' (Select). Below the filters are 'Search' and 'Save View' buttons. A table of documents is displayed with columns: Document Title, Summary, Last Update, Downloaded, Parent Directory, Uploaded By, and Action. The table lists several documents, including 'Getting Started Guide', 'Sunrise w Font', 'Sunrise Drop-Off', 'FastFacialForm', 'Video', and 'VA primary logo'.

**FOLDER**

- Home
- Index
- .SUNRISE FLYERS
- Area Developer Toolkit
- Branding and Marketing
- HR
- Human Resources
- Marketing
- Opening Documents
- Operations
- Recovery
- Sales
- Vendor Information

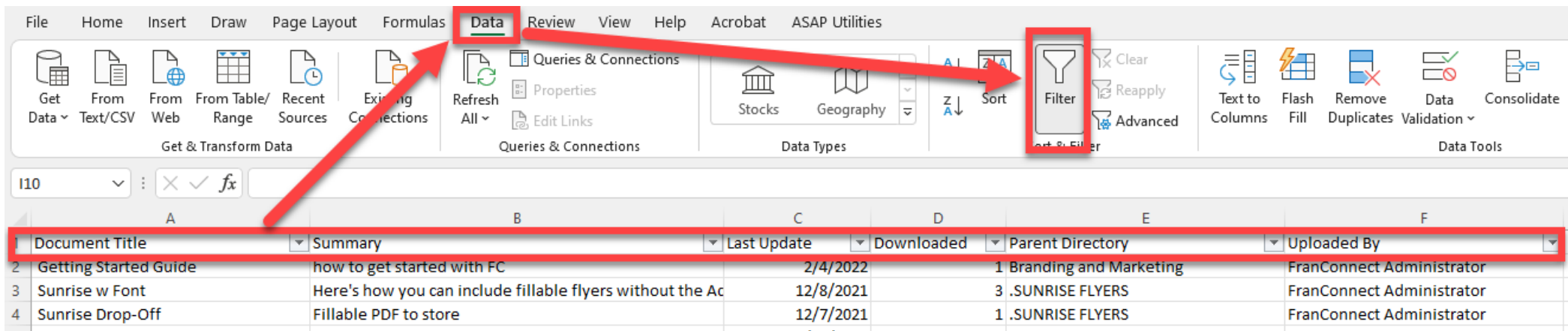
**INDEX**

Document Type: All | Document Subtype: All | Sort By: Select

Search | Save View

Document Title	Summary	Last Update	Downloaded	Parent Directory	Uploaded By	Action
Getting Started Guide	how to get started with FC	02/04/2022	1	Branding and Marketing	FranConnect Administrator	
Sunrise w Font	Here's how you can include fillable flyers without the Ads module.	12/08/2021	3	.SUNRISE FLYERS	FranConnect Administrator	
Sunrise Drop-Off	Fillable PDF to store	12/07/2021	1	.SUNRISE FLYERS	FranConnect Administrator	
FastFacialForm	Fill this out for FastFacial Training	11/18/2021	1	Bio-Dispoz	FranConnect Administrator	
Video	Video	09/28/2021	4	HR	FranConnect Administrator	
VA primary logo	Use this version of the logo for two color printing	09/24/2021	1	Human Resources	FranConnect	

- Copy from your page (Ctrl-C), and paste SPECIAL so you don't get any control features from the page...(Alt-E,S,T)
- Choose to sort by the headers (highlight header row – Data > Filter > Sort)



Check your keywords  
against the ones  
searched for

Check your Update  
dates. Sometimes old  
stuff is still valid, but...

Better yet, sort by  
uploader and  
distribute the work!

## Who's reading the news?

- You can do the same research about how popular your Hub news stories are. Run the News Logs for the desired period and export the results to analyze.
- This is a great place to find power users to be your advocates!

Fields marked with \* are mandatory.

\*From Date: 01/15/2022 \*To Date: 02/15/2022 Search

**NEWS LOGS REPORT** Items 1 - 20 of 29 | First | Prev | 1 | 2 | Next | Last

User Name	Document Title	Folder Name	No. of Download	Last download Date ▼
			4	02/15/2022
			2	02/14/2022
			4	02/14/2022

# NEXT STEPS

Now that you know what's what:

1. Remove or update outdated documents. Don't worry,, all your old URLs to it will point to the new document!
2. Update document descriptions to aid searching. FC searches in the Title and the Description.
3. Review your folder structure – is it how you would navigate to documents?

## *Springboard Take-Aways:*

*Analyze your Hub usage logs to see what's working and what could use some help. Then update it!*

The image features a large, stylized 'Q&A' in the center. The 'Q' and 'A' are orange, while the ampersand is blue. The background is a warm orange color with a faint, geometric network pattern of lines and dots. To the right of the 'Q&A', the text 'what's on your mind?' is written in a white, sans-serif font.

**Q&A** what's on your mind?



If you think of a question after this session...

Email us and we'll find the answer!



[training@franconnect.com](mailto:training@franconnect.com)