Tableau and CRM Monthly Reporting Instructions

Each FRC is required to submit a monthly report to their DCF Community Support Manager and the Program Director at UMass Chan Medical School. These reports are the documentation to support the FRC's monthly billing. FRC Program Managers and/or Directors must complete and submit the report by the 15th of the following month.

The data for the monthly report is pulled from two applications, Tableau, and the CRM database.

- Tableau's "FRC Monthly Report est. 2025" Dashboards
- CRM Monthly Reporting Narrative

Best practice is to add to the monthly narrative as the month progresses. This will save you from having to complete it all at once. You will need the Tableau data to help inform some of the narrative content. This portion may need to be entered between the 1st and 15th of the month following the month you are reporting on. Please set expectations with your staff of when all their monthly data needs to be entered.

This job aid is to help you with exporting both portions of your monthly report requirement. If you do not have @Comunity-Family.org credentials or have any questions, please contact FRCHelp@umassmed.edu.

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I. Signing into the Community-Family Homepage

- 1. To open a Google Chrome Incognito Window. Follow the steps outlined below.
 - a. Open a Google Chrome window.
 - b. Select the 3 dots in the top right corner.
 - c. Select "New Incognito Window".

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2. Copy and paste the following link into a Google Chrome Incognito window.

https://myapps.microsoft.com





3. A Microsoft sign in page will display. Enter your username (e.g., Kaela.Dunn@Community-Family.org) and select "**Next**".

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Sign in	
Email, phone, or Skype	
No account? Create one!	
Can't access your account?	
	Next

<u>NOTE</u>: If you do not use Google Chrome Incognito, Microsoft may automatically log you into your most recently used account. By using Incognito browsing, you will easily be able to enter the appropriate username and password.

4. Next, you will be prompted to enter your password.





- 5. Select a method to verify your identity.
 - a. If you choose to receive a call, follow the steps on the phone call.
 - b. If you choose to receive a text, enter the 6-digit code you received into the provided box. Then select, "**Verify**".

Microsoft	Microsoft
demo.nv@community-family.org	demo.nv@community-family.org
Verify your identity	Enter code
Text +X XXXXXXX40	We texted your phone +X XXXXXXX40. Please enter the code to sign in.
Call +X XXXXXXX40	686983
More information	Having trouble? Sign in another way
Are your verification methods current? Check at https://aka.ms/mfasetup	More information
Cancel	Verify

6. The Community-Family Homepage will appear, and you will see the appropriate applications you have access to.





II. Monthly Tableau Report

1. On the Community-Family Homepage, select the Tableau app.



- 2. Select the "Explore" term and/or icon displayed on the left side of the screen.
 - a. Example 1:

-	Q. Search for views, methics, workbooks, and more
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() Recents	Your Tableau site—where analytics and your organization meet
48. Shared with Me	Harness your data. Discover opportunities. Elevate your insights.
♀ Recommendations	Start Exploring
③ Personal Space	
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① Explore	Click the star scon right add a fasiente.

b. Example 2:

>		Q Search for views, metrics, workbooks, and more
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- 3. Select "FRC_YourSite'sLocation_Monthly_Report_est.2025".
 - a. Note the DCF folder shown below is an example. Again, your FRC Tableau workbook will display along with the appropriate site reports.

<	Explore / DCF	O Search for views, workbooks, and more
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	New 🔻 Select All	Content Type: All 🔹 Sort By: Type 💌 🗮 💌 🏹
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- In the Monthly Report folder, you will see the options for your FRCs Dashboards: Families & Members, Services, Events & Contact Logs. These are condensed focused views of tabs 1 – 13 also in this folder.
- Explore / DCF / DCF_Monthly_Report_est2025 O Search for views, workbooks, and more 蛰 DCF__Monthly_Report_est2025 ☆ 💿 … Owner Hollick, Erik Modified Feb 24, 2025, 3:30 AM Extract Feb 24, 2025, 3:30 AM FRC_UAT Views 33 Data Sources 13 Custom Views 0 Extract Refreshes 1 Subscriptions 0 ☆ Home Select All Sort By: SI ☆ Favorites Type Name Actions Recents Dashboard Families & Members Shared with Me Dashboard Services Q Recommendations 🔲 🏡 📶 Dashboard Events & Contact Log □ 🖧 iii 1. Family & Members Numbers Bt Collections Explore 🗋 🏡 🔝 2. New Family Member Age Breakdown 다. 중 네. 3. Household Family Members Services set to no ... □ ☆ In 4. Adult & Child Screenings □ ☆ III 5. CRA and CRA at Risk Youth and FSNA □ ☆ iii 6. Cities and Towns □ ☆ III 7. Referral Source 🗋 📩 🔝 8. Services 9.All Services Summary 🔲 🏡 🔝 Services by Category A 🗋 📩 🔝 Services by Category B
- a. Select "Dashboard Families & Members".



5. Now, locate the filters in the top right corner. Change the '*Year*' and '*Month*' filters to the year and month needed.

- Explore / DCF / DCF_Monthly_Report_est2025 / Dashboard Families & Members 🖧	🖰 Data Sources 📿 📑 🧭 🗘 🔀
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💌 < 🛛 Dashboard Families & Members 🔹 Dashboard Services 🔹 Dashboard Events & Contact L 🔹 1. Family & Members Numb	bers 2. New Family Member Age Bre 3. Household Family Members 4. Adult & Child Screenings 5. CRA and CRA at Risk Youth a
Selected Year Selected 2025 Februar	d Month Frc Name ry • Training •
Family and Family Members	
1. Count Unduplicated Families with a New Family Member with a new intake	
Feb	Grand Total
2025 Training	1 1

6. Next, select the 'Download' icon in the top right corner and select, "PDF".

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1. Count Unduplicated Families with a New Family Member with a new in	take					
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Grand Total		1			1	

- 7. Select specifications outlined below. When finished, select "Create PDF".
 - a. Change 'Include' to "Specific sheets from this workbook" and select the first 3 dashboard squares.
 - b. Leave 'Scaling' as "Automatic".
 - c. Change 'Paper Size' to "Unspecified".
 - d. Leave 'Orientation' as "Portrait".

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<u>NOTE</u>: We are changing 'Paper Size' to "Unspecified" because for the Monthly Reporting, this PDF will only be virtually used. If you would like to export a PDF from Tableau to later print, keep 'Paper Size' as "Letter".

8. Your computer should notify you that the download is complete. If not, the downloaded file will be accessible in the Downloads section of your computer's file folder.

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9. Please ensure you edit the Tableau report's file name to: Monthly_Report_FRCName_MonthYear



III. CRM Monthly Reporting Narrative

1. On the Community-Family Homepage, select the Family Resource Center CRM icon.



- 2. On the CRM homepage, select "Monthly Reporting Narrative".
 - a. The 1st tab states, '*Monthly Reporting*', do not select that as it is the old report. Locate the 2nd tab that states '*Monthly Reporting Narrative*'.

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Contact Logs		FAM-512	Damian	23 Main st		Worces	01609			Training	8/13/202	11/30/20
Providers		FAM-512	Gabriel	56 Main st		Abingt	01609			Training	8/20/202	8/23/202
rting		FAM-512	Williams	23 Main st		West D	01094			Training	8/24/202	3/25/202
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3. To create a new report, please select "+New".

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A Family Members	3/3/2025 10:03 AM	Scott Woffenden	January 2025		umassmedcwm060	uat
FRC Forms						

Note: The **"Monthly Reporting Narrative Old"** may appear. This is the monthly report from 2022 and prior. If this happens, we will need to change over to the most recent Monthly Reporting Narrative.

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公 Providers	# Dunn, Kaela	

Note continued: Select "Monthly Reporting Narrative Old" to see a menu. The "Monthly Reporting Narrative" option was the form used in 2023 and 2024. The "Monthly Reporting Narrative Est. 2025" is the correct form to use to complete 2025 Monthly Reporting.

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4. After ensuring you are in using the "Monthly Reporting Narrative Est.2025" form. Proceed with filling out each section.



5. Once your report is ready to be exported from the CRM, navigate to the main page 'Active Monthly Reporting Narrative'. Then select the Monthly Report you need to download. It will highlight in grey to show it has been selected.

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🖏 Event / Activity		3/25/2024 1:17 PM	FRC Training	March 2024	Training				
Contact Logs		11/6/2023 8:56 PM	FRC Training	October 2023	Training				
🔀 Providers		9/13/2023 6:05 PM	FRC Training	August 2023	Training				



- 6. Now select "Word Templates" then select "Monthly Reporting Narrative Est 2025".
 - If you need to export a monthly report completed between 2023 January 2025, meaning the "Monthly Reporting Narrative" form was used, select the word template "2023 Monthly Reporting Narrative".
 - If you need to export a monthly report completed in 2022 and prior, meaning the "Monthly Reporting Narrative Old" form was used, select the word template "Monthly Reporting Narrative".

Note: If you hover over the 3 Monthly Reporting Narrative templates, the system will show you the full title of the template if you need further clarification on your selection.

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7. Your computer should notify you that the download is complete. If not, the downloaded file will be accessible in the Downloads section of your computer's file folder.

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 Please ensure you edit the Monthly Reporting Narrative's file name to: Monthly Narrative_FRCName_MonthYear

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