# 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 15$^{th}$ 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 1$^{st}$ and 15$^{th}$ 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**".
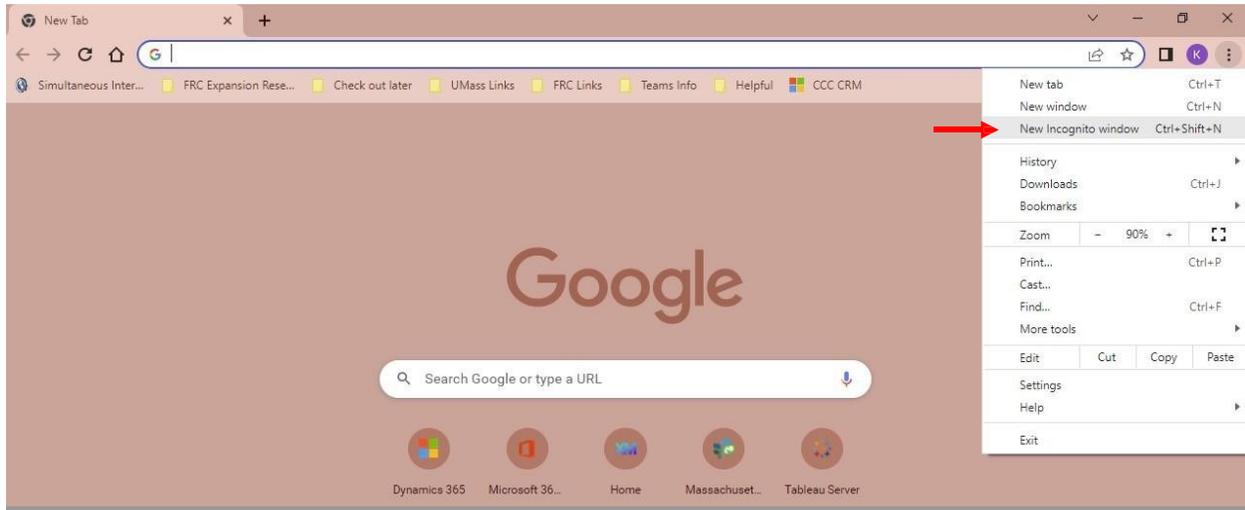


2. Copy and paste the following link into a Google Chrome Incognito window.
   https://myapps.microsoft.com
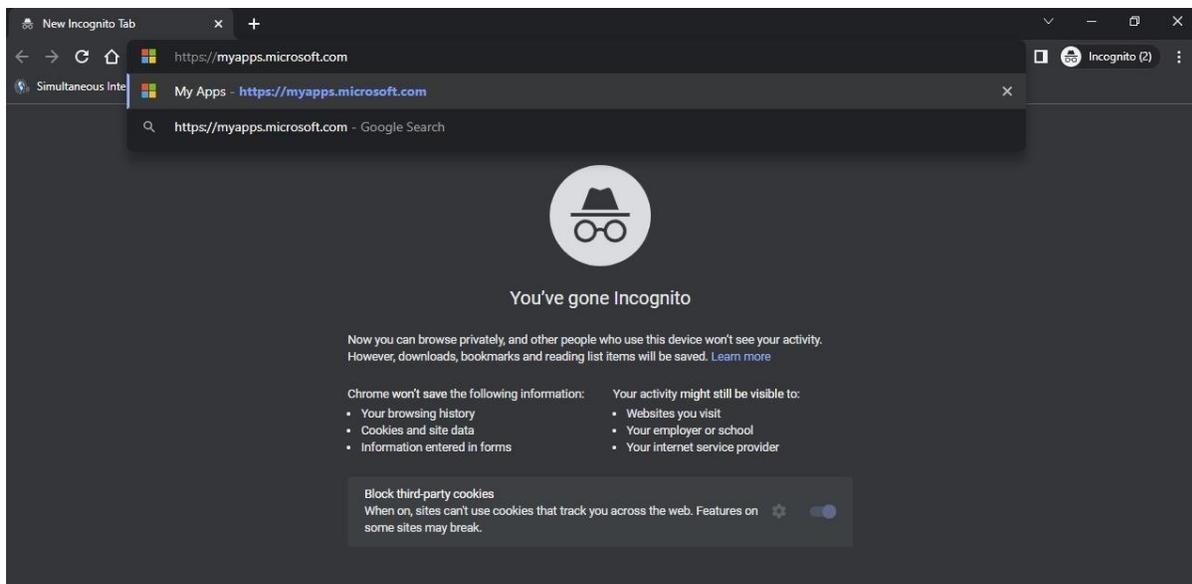
3. A Microsoft sign in page will display. Enter your username (e.g., Kaela.Dunn@Community-Family.org) and select "**Next**".
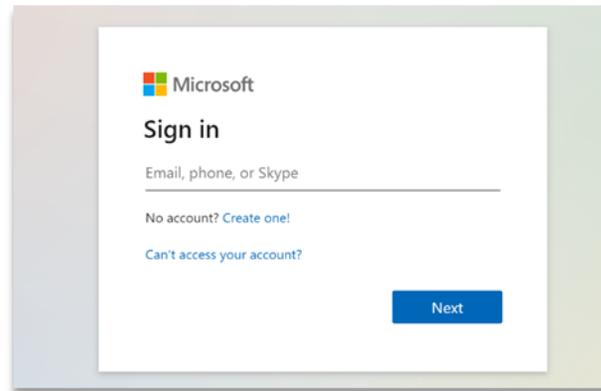


NOTE: If you do not use Google Chrome Incognito, Microsoft may automatically log you into your most recently used account. By using Incognito browsing, you will easily be able to enter the appropriate username and password.

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

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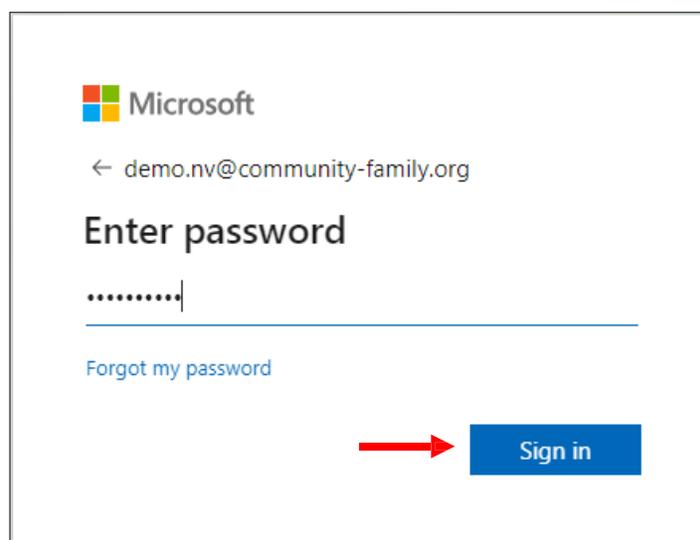
5. Select a method to verify your identity.
   a. If you choose to receive a call, follow the steps on the phone call.
   b. If you choose to receive a text, enter the 6-digit code you received into the provided box. Then select, "**Verify**".
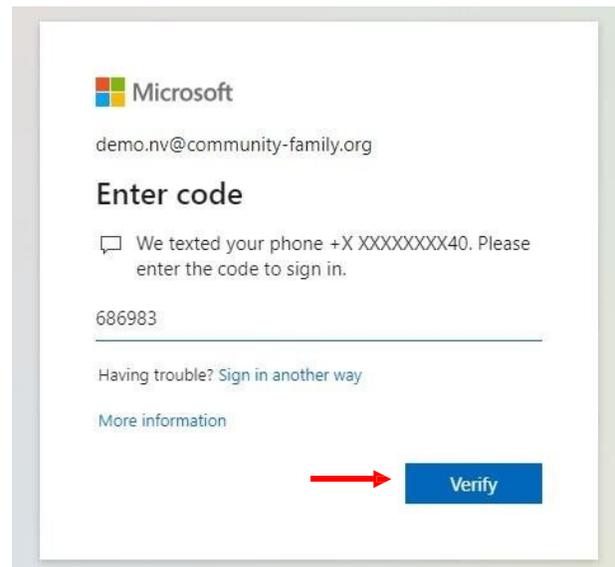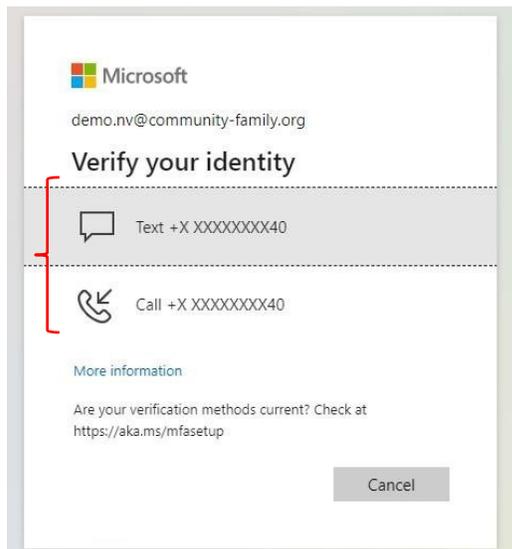


6. The Community-Family Homepage will appear, and you will see the appropriate applications you have access to.
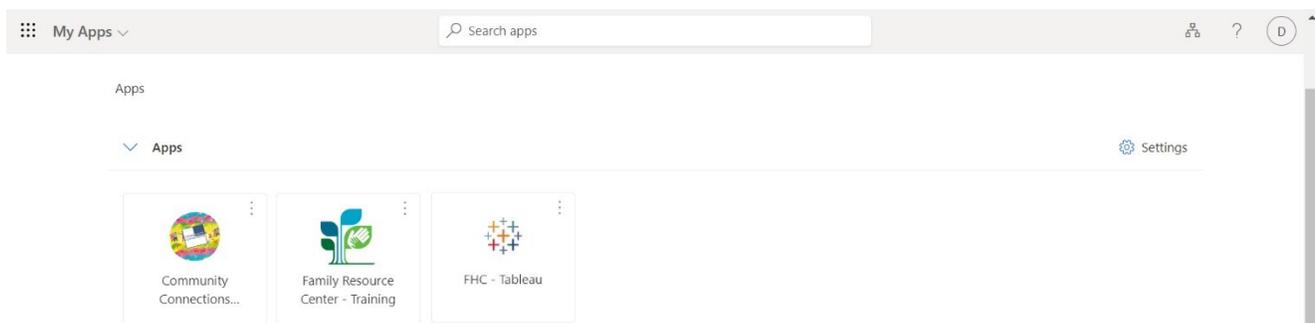
## II. Monthly Tableau Report

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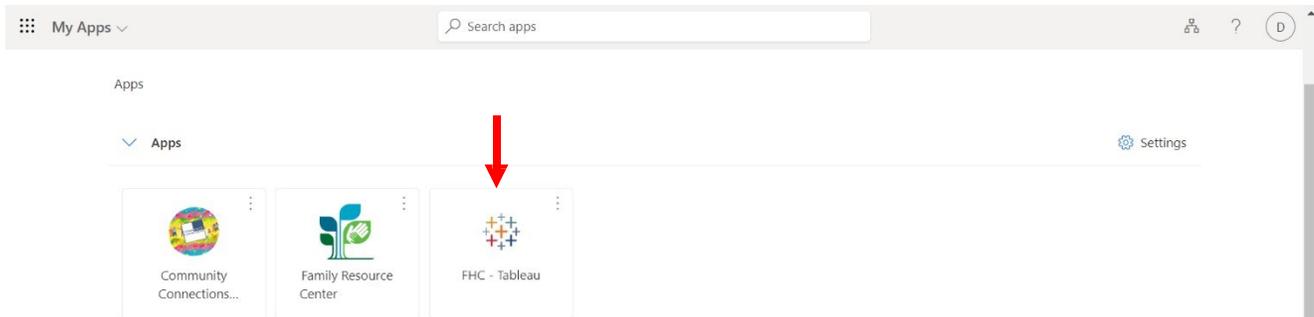


2. Select the "**Explore**" term and/or icon displayed on the left side of the screen.

   a. Example 1:
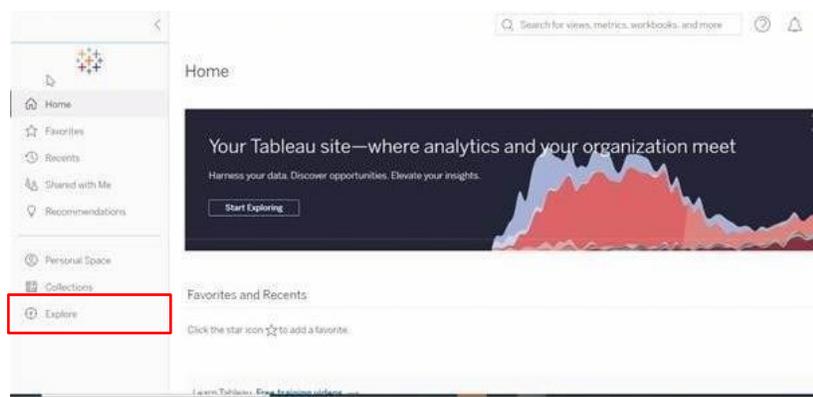
   

   b. Example 2:
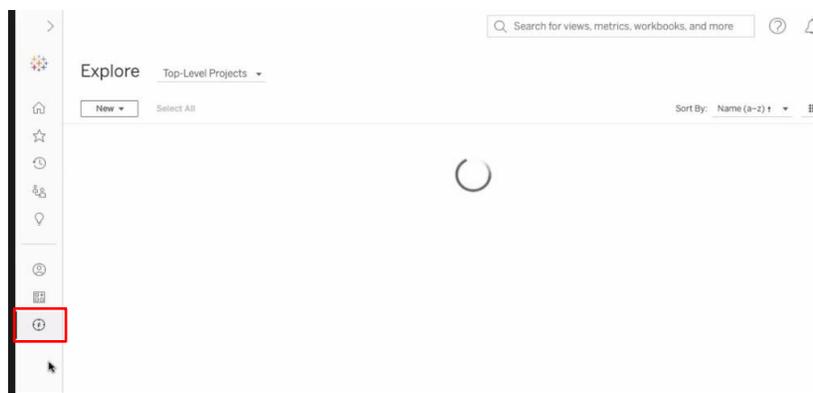
3. Select "**FRC_YourSite'sLocation_Monthly_Report_est.2025**".
   a. Note the DCF folder shown below is an example. Again, your FRC Tableau workbook will display along with the appropriate site reports.
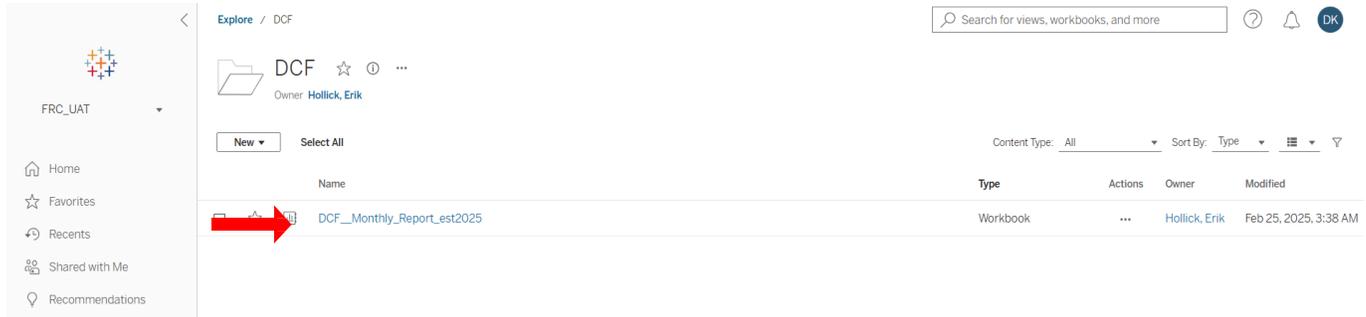


4. In the Monthly Report folder, you will see the options for your FRCs Dashboards: Families & Members, Services, Events & Contact Logs. These are condensed focused views of tabs 1 – 13 also in this folder.
   a. Select "**Dashboard Families & Members**".
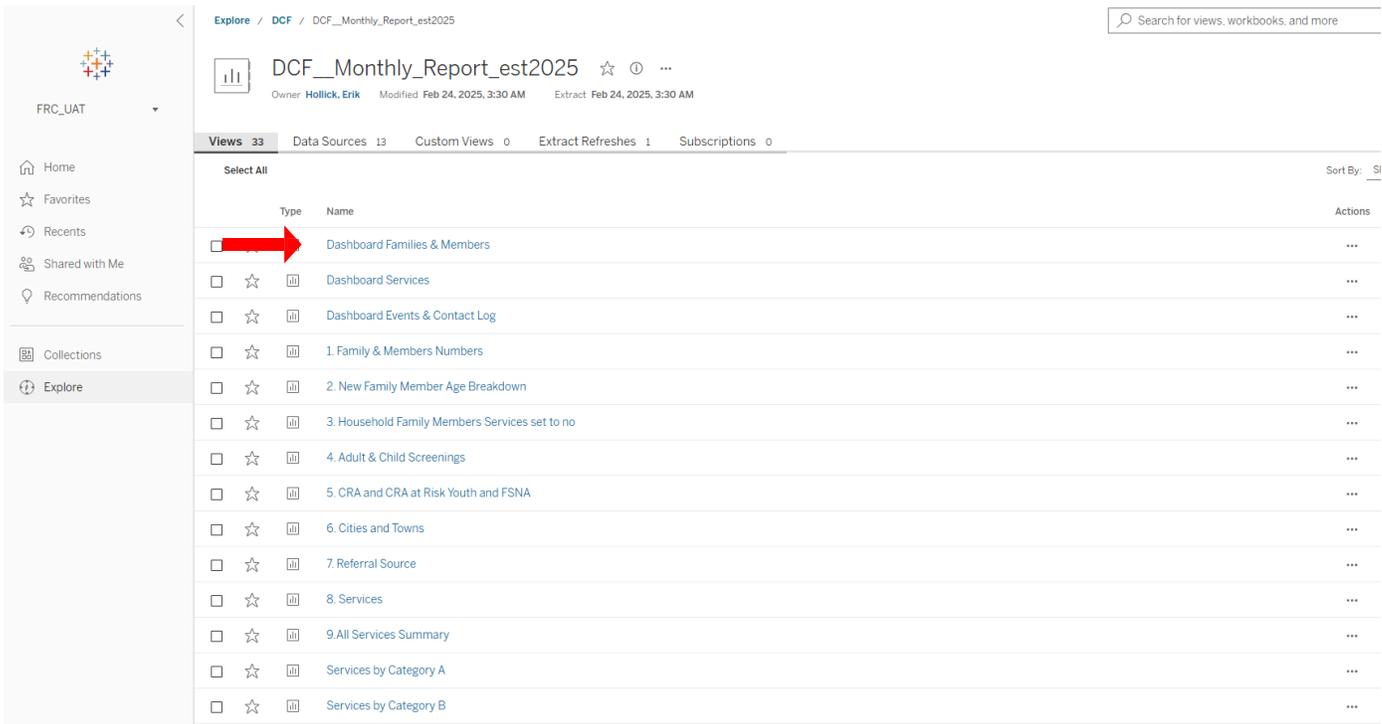
5. Now, locate the filters in the top right corner. Change the '*Year*' and '*Month*' filters to the year and month needed.
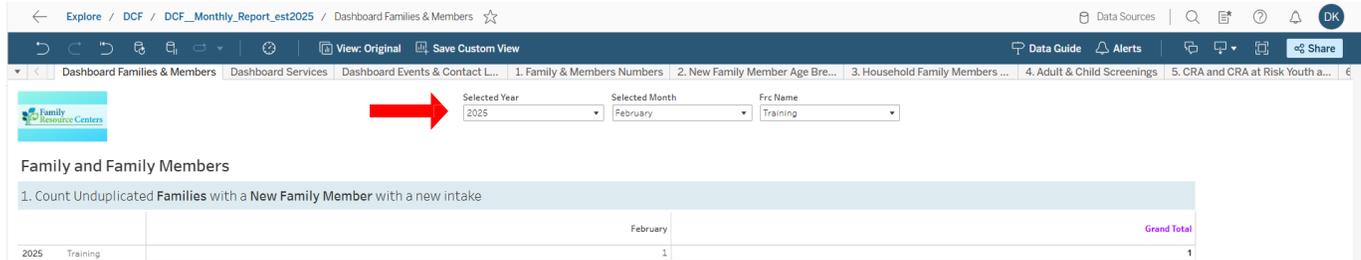


6. Next, select the '*Download*' icon in the top right corner and select, "**PDF**".
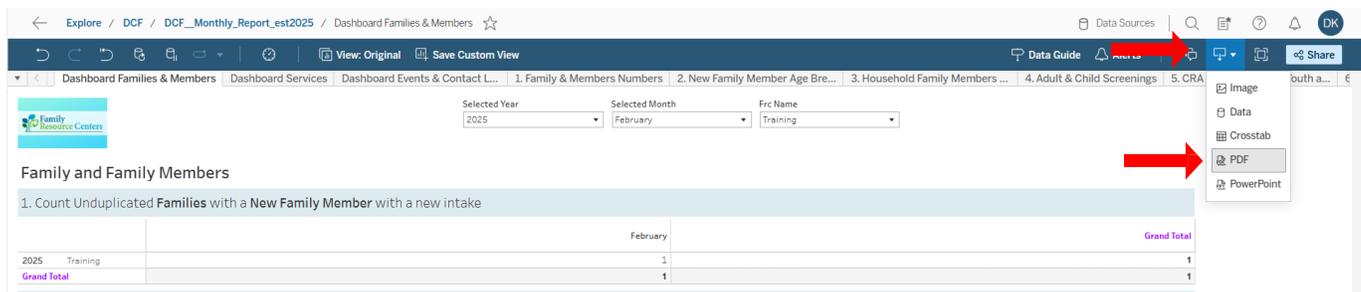


7. Select specifications outlined below. When finished, select "**Create PDF**".
   a. Change 'Include' to "Specific sheets from this workbook" and select the first 3 dashboard squares.
   b. Leave 'Scaling' as "**Automatic**".
   c. Change 'Paper Size' to "**Unspecified**".
   d. Leave 'Orientation'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

NOTE: 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.

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.
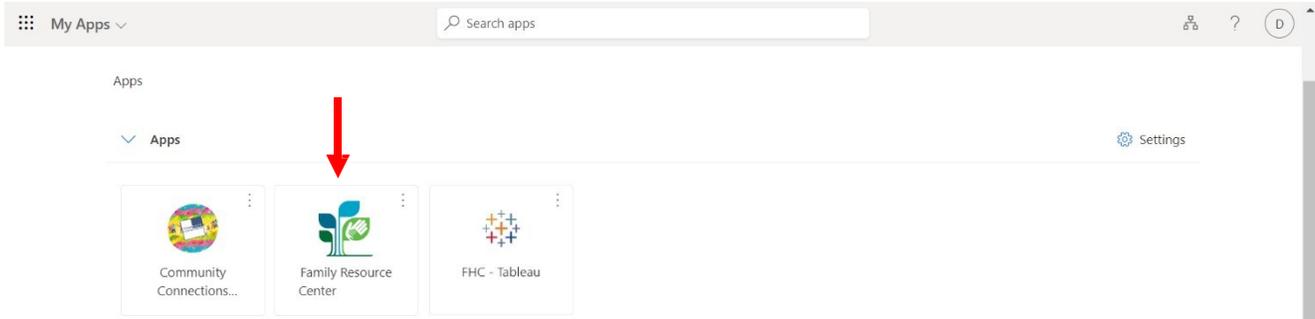


2. On the CRM homepage, select "**Monthly Reporting Narrative**".
   a. The 1st tab states, '*Monthly Reporting*', do not select that as it is the old report. Locate the 2nd tab that states '*Monthly Reporting Narrative'*.
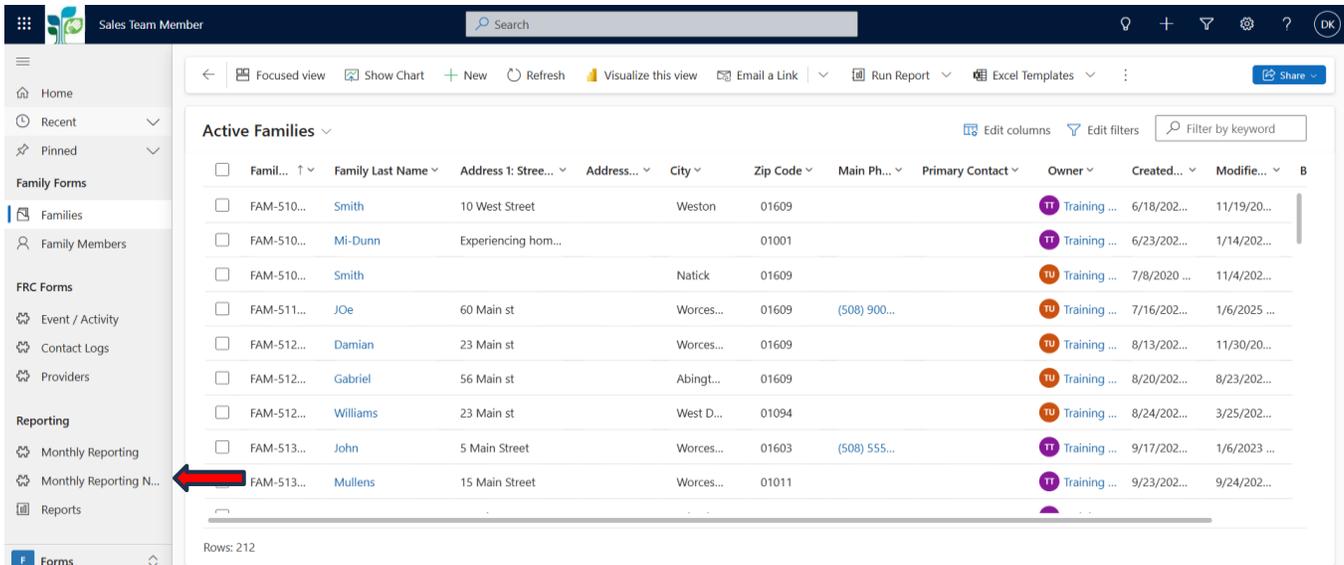
3. To create a new report, please select "**+New**".
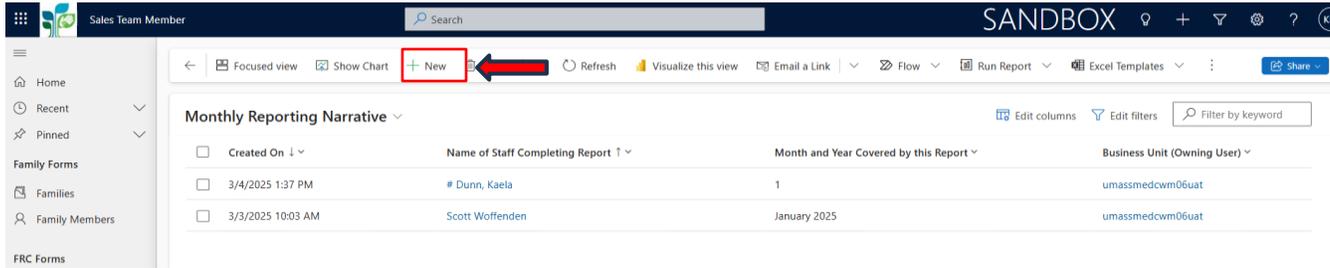


Note: The "**Monthly Reporting Narrative Old**" may appear. This is the monthly report from 2022 and prior. If this happens, we will need to change over to the most recent Monthly Reporting Narrative.
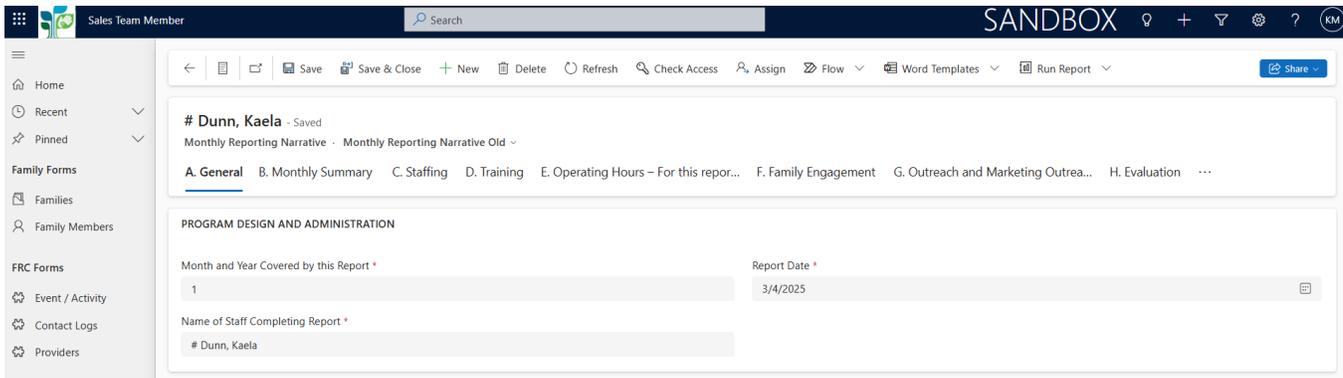


Note continued: Select "**Monthly Reporting Narrative Old**" to see a menu. The "**Monthly Reporting Narrative**" option was the form used in 2023 and 2024. The "**Monthly Reporting Narrative Est. 2025**" is the correct form to use to complete 2025 Monthly Reporting.
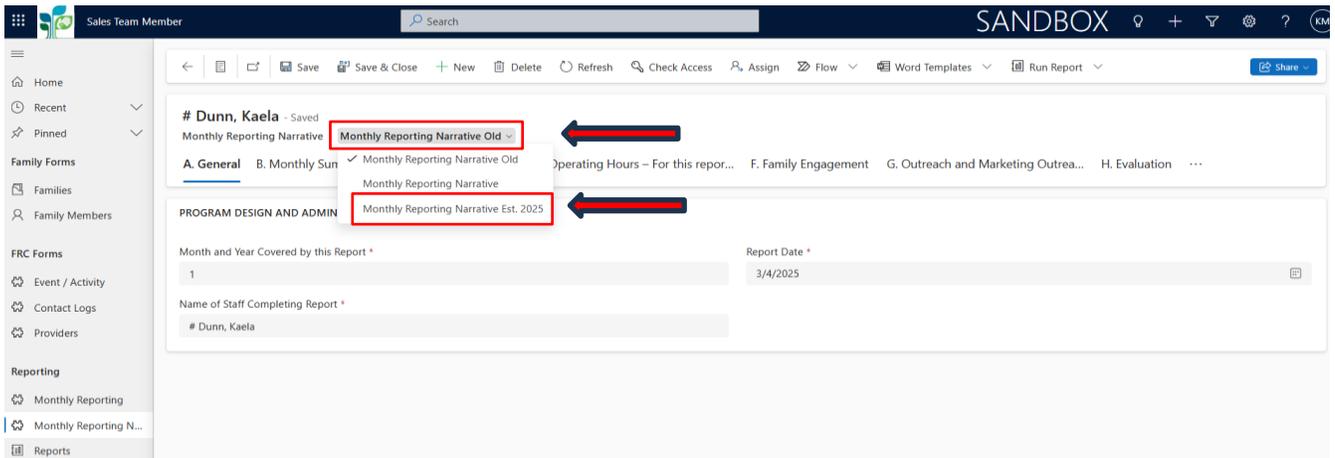
4. After ensuring you are in using the "**Monthly Reporting Narrative Est.2025**" form. Proceed with filling out each section.



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.

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.
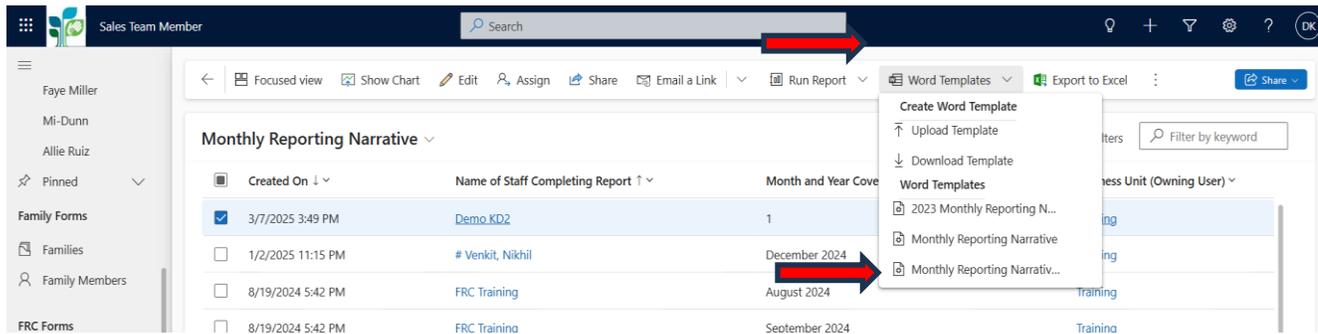


7.  Your computer should notify you that the download is complete. If not, the downloaded file will be accessible in the Downloads section of your computer's file folder.



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