

Tableau and CRM Monthly Reports Instructions

Each FRC is required to submit a monthly report to their Community Support Managers at DCF and the Program Director at UMass 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 month.

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

- Tableau Dashboard Page 1 and 2
- 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 an expectation with your staff of when all their monthly data needs to be entered.

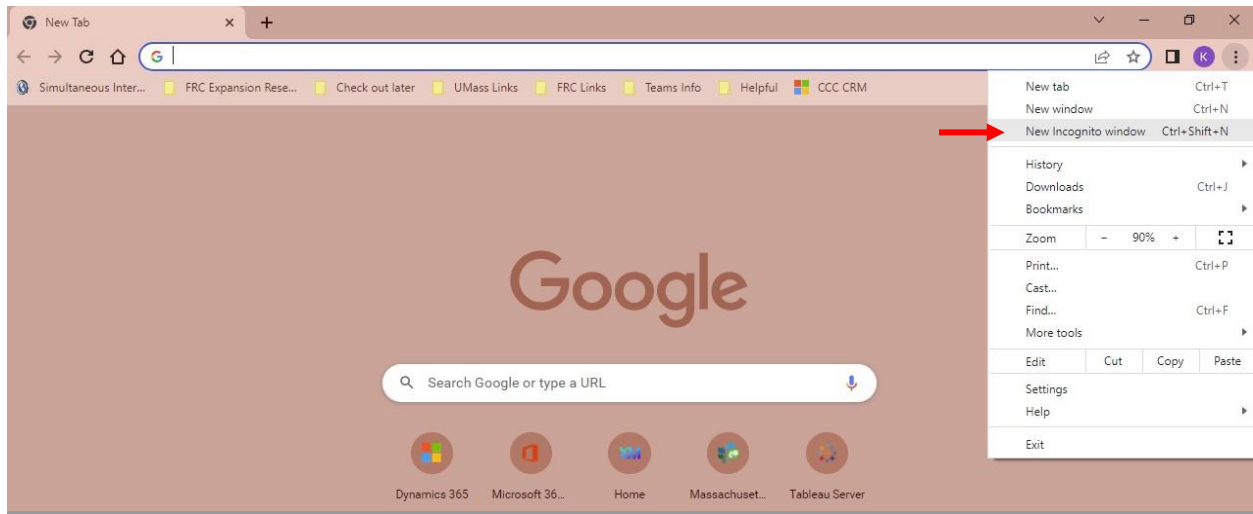
This job aid is to help you with completing and downloading your monthly report requirement. If you do not have @Comunity-Family.org credentials or have any questions, please contact @FRCHelp@umassmed.edu.

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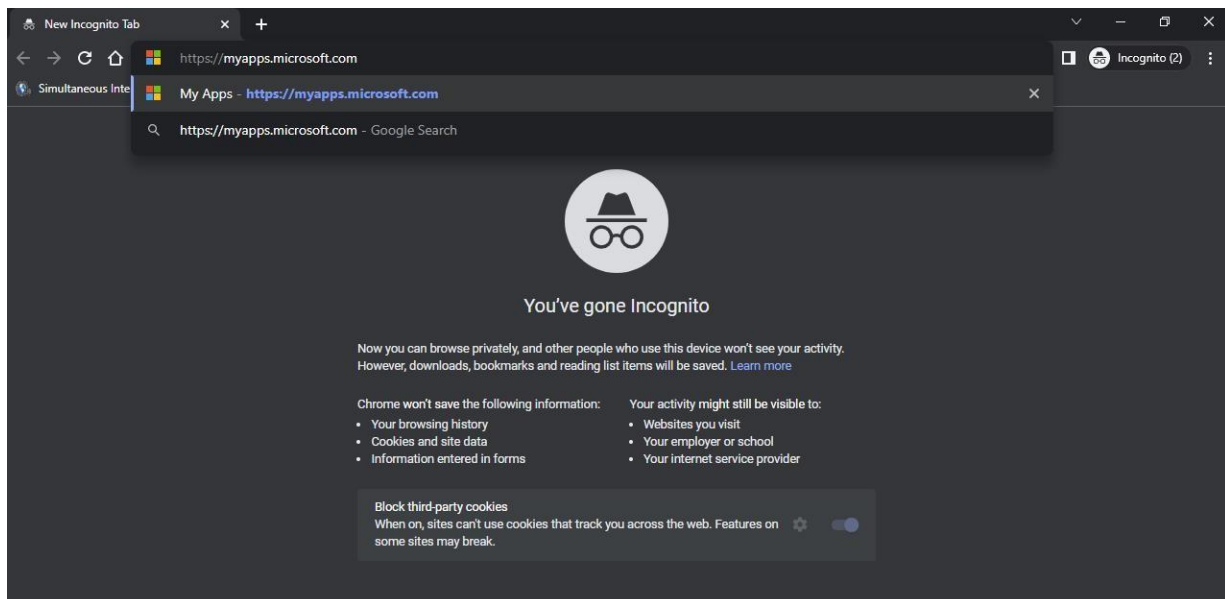
I. Signing into the Community-Family Homepage

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”**.

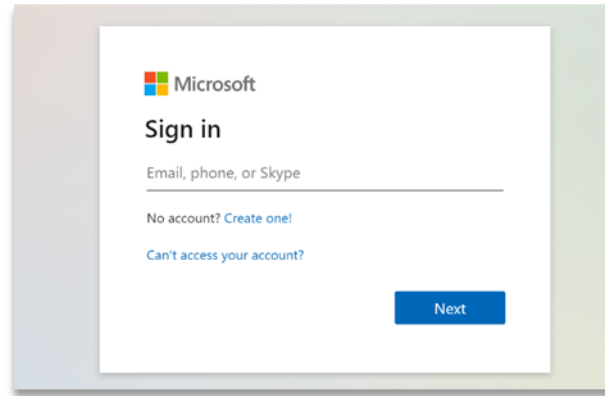


2. Copy and paste the following link into a Google Chrome Incognito window.

<https://myapps.microsoft.com>

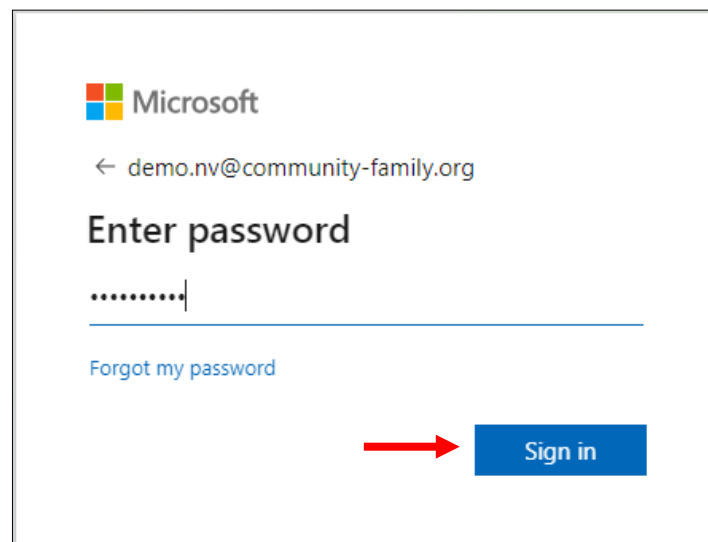


3. A Microsoft sign in page will display. Enter your username (e.g., Kaela.Dunn@Community-Family.org) and select “**Next**”.

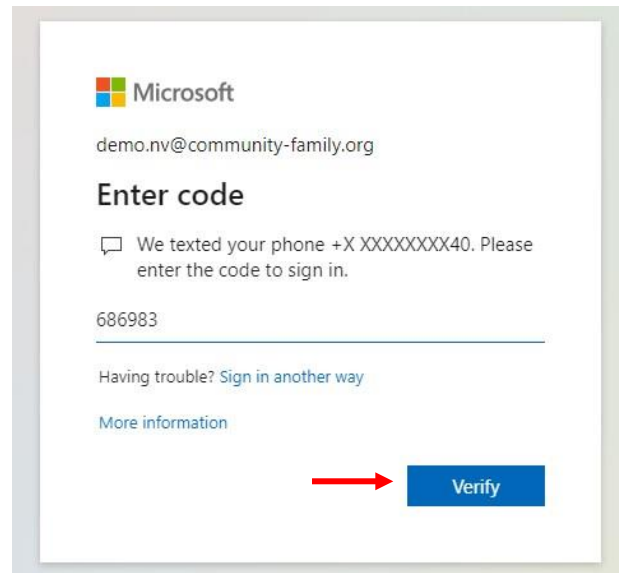
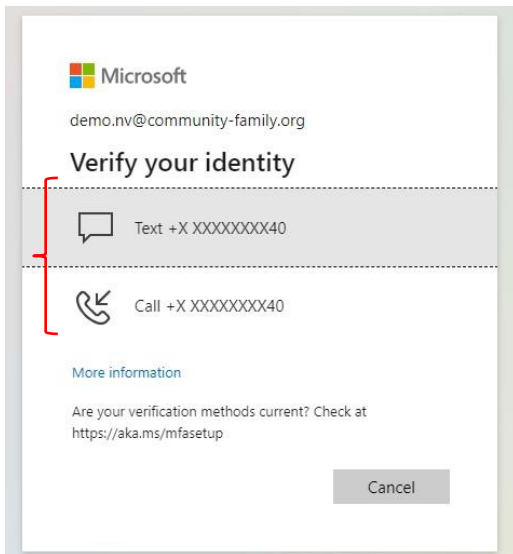


NOTE: If you do not use Google Chrome Incognito, Microsoft may automatically log you into your most recently used account. By using Incognito browsing, you will easily be able to enter the appropriate username and password.

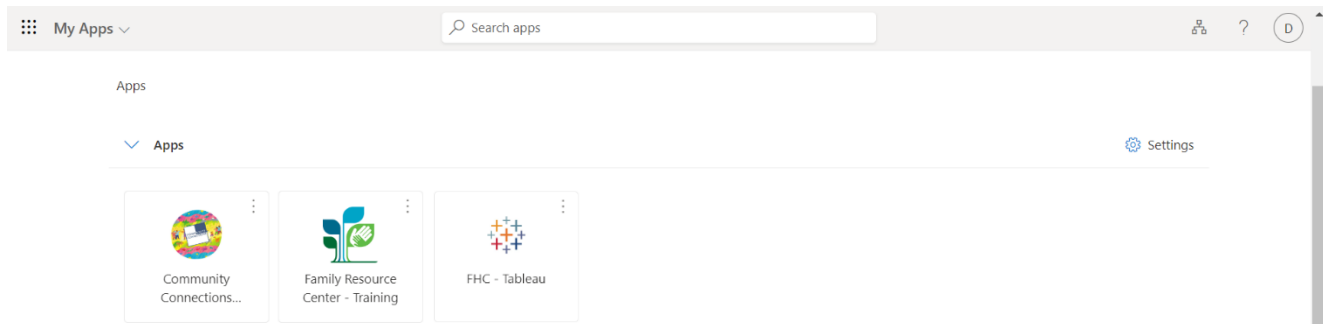
4. Next, you will be prompted to enter your password.



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”**.

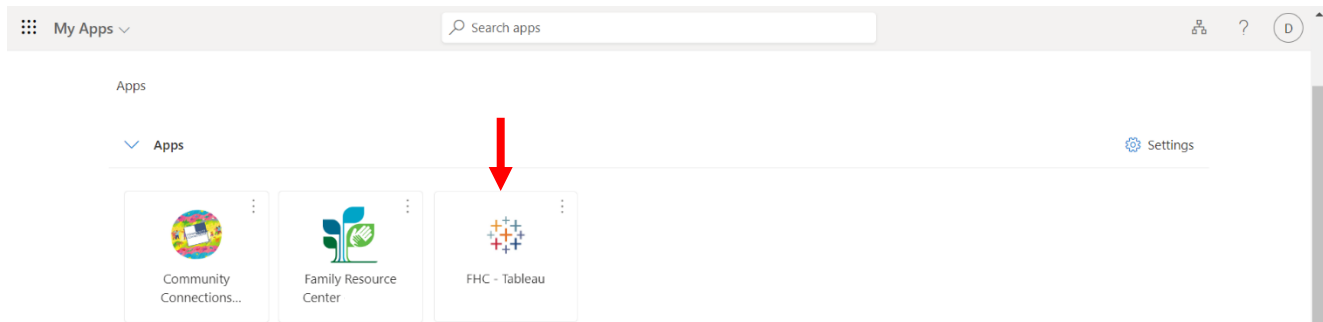


6. The Community-Family Homepage will appear, and you will see the appropriate applications you have access to.



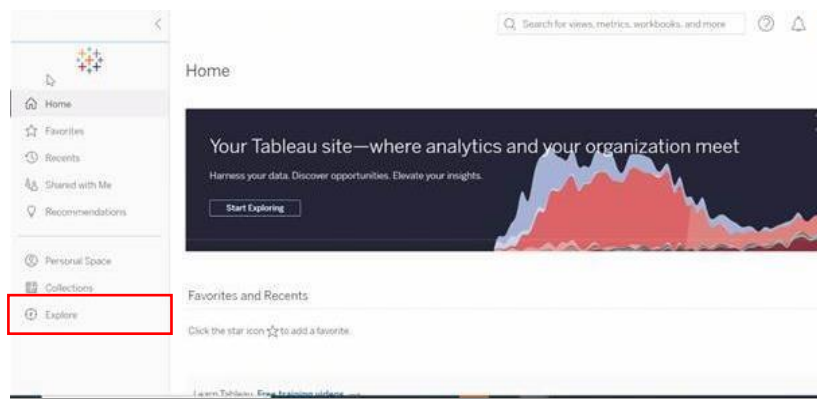
II. Monthly Tableau Report

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

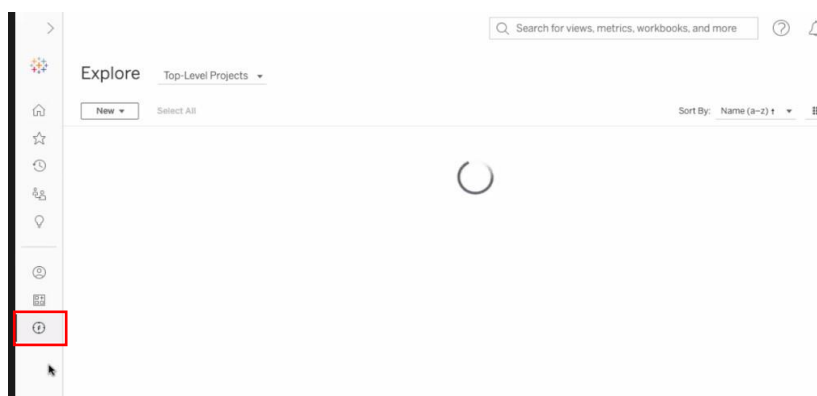


2. Select the “**Explore**” term and/or icon displayed on the left side of the screen.

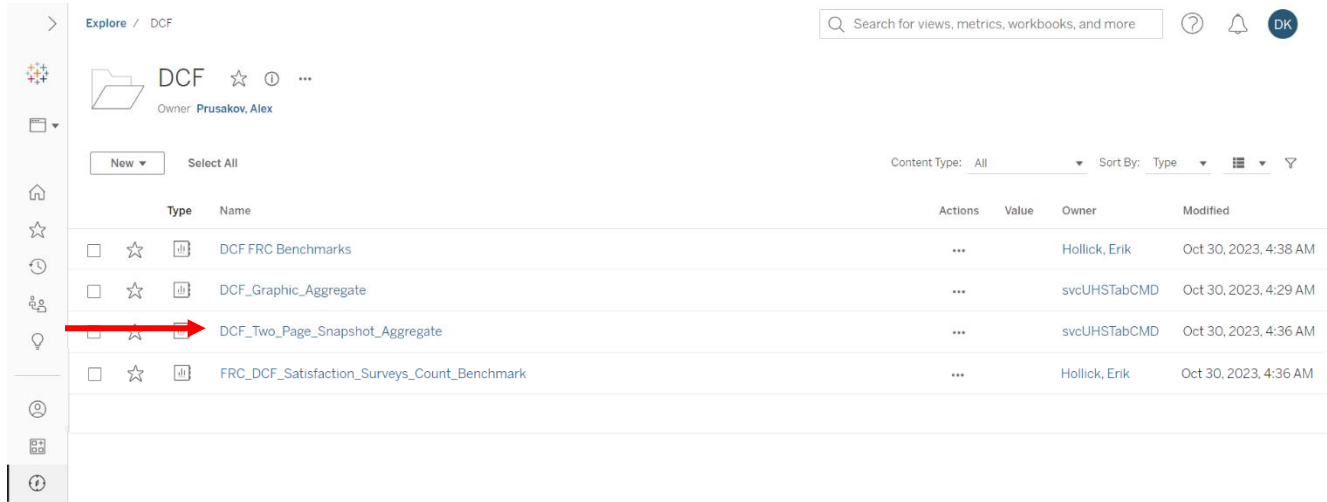
- a. Example 1:



- b. Example 2:



3. Your FRC Tableau workbook will display. You will see options for your FRC Benchmarks, the Graphic Aggregate, the Two Page Snapshot Aggregate, and the new Satisfaction Survey Benchmark. Select **“Two_Page_Snapshot_Aggregate”**.
 - 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

Search for views, metrics, workbooks, and more

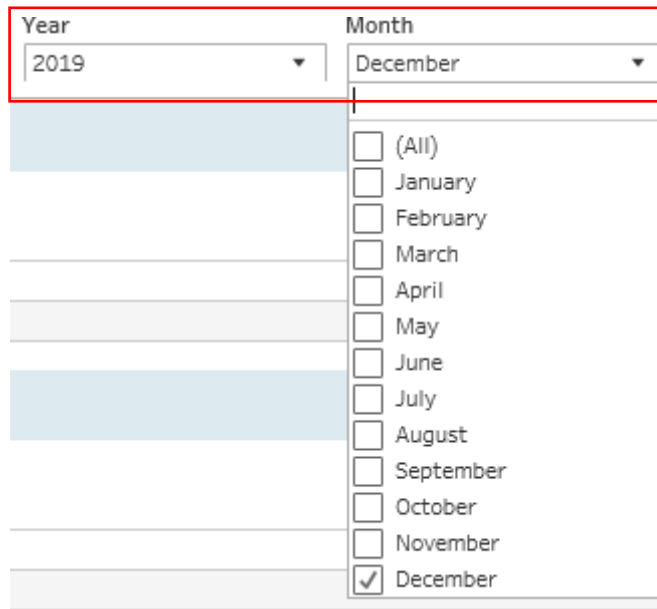
DCF ☆ ⓘ ...
Owner: Prusakov, Alex

New ▾ Select All

Content Type: All ▾ Sort By: Type ▾

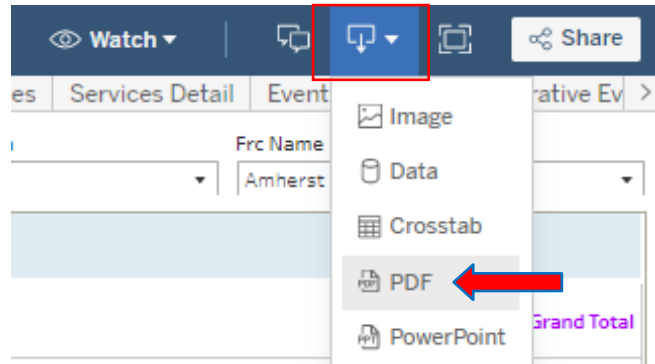
Type	Name	Actions	Value	Owner	Modified
<input type="checkbox"/> ☆ 📄	DCF FRC Benchmarks	...		Hollick, Erik	Oct 30, 2023, 4:38 AM
<input type="checkbox"/> ☆ 📄	DCF_Graphic_Aggregate	...		svcUHSTabCMD	Oct 30, 2023, 4:29 AM
<input type="checkbox"/> ☆ 📄	DCF_Two_Page_Snapshot_Aggregate	...		svcUHSTabCMD	Oct 30, 2023, 4:36 AM
<input type="checkbox"/> ☆ 📄	FRC_DCF_Satisfaction_Surveys_Count_Benchmark	...		Hollick, Erik	Oct 30, 2023, 4:36 AM

4. Locate *‘Dashboard Page 1’*. Now, locate the filters in the top right corner. Change the *‘Year’* and *‘Month’* filters to the year and month needed.

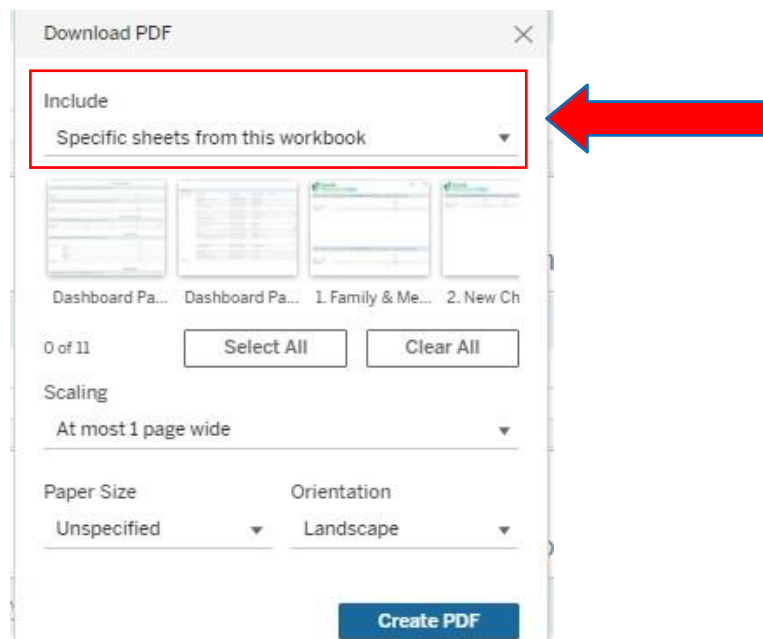


Year	Month
2019 ▾	December ▾
	<input type="checkbox"/> (All) <input type="checkbox"/> January <input type="checkbox"/> February <input type="checkbox"/> March <input type="checkbox"/> April <input type="checkbox"/> May <input type="checkbox"/> June <input type="checkbox"/> July <input type="checkbox"/> August <input type="checkbox"/> September <input type="checkbox"/> October <input type="checkbox"/> November <input checked="" type="checkbox"/> December

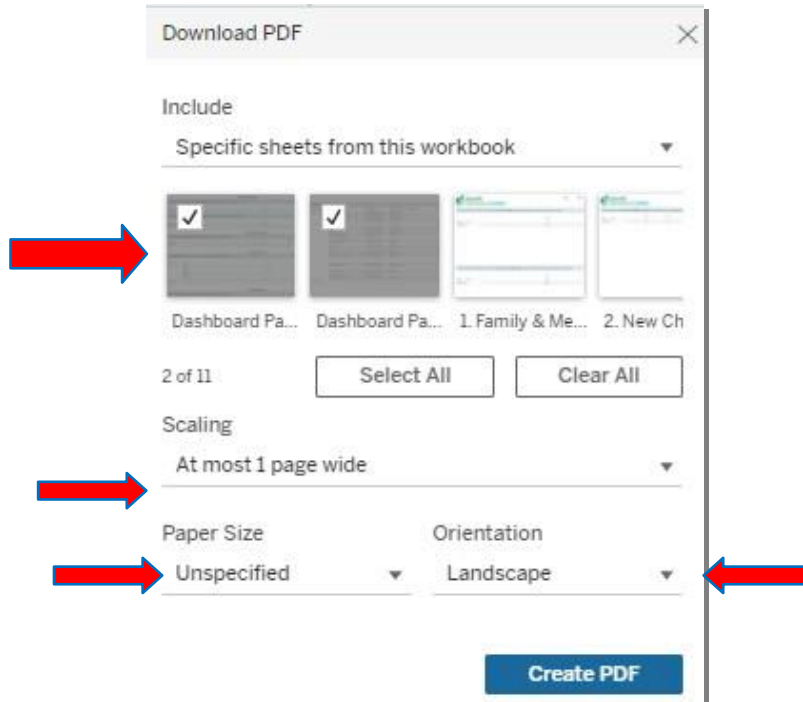
- Next, select the 'Download' icon in the top right corner.



- When the next box pops up, under 'Include', change "This View" to "Specific sheets from this workbook".



7. Select specifications outlined below. When finished, select **“Create PDF”**.
 - a. The first 2 dashboard squares as shown below.
 - b. Set Scaling to **“At most 1 page wide”**.
 - c. Set Paper Size to **“Unspecified”**.
 - d. Set orientation as **“Landscape”**.



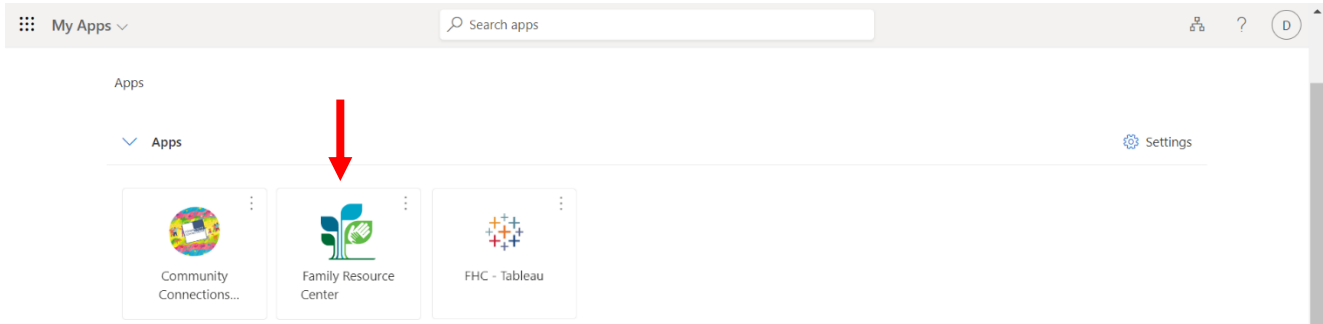
8. There will be a popup at the bottom of your screen notifying you the download is complete. Select the PDF to view your report.



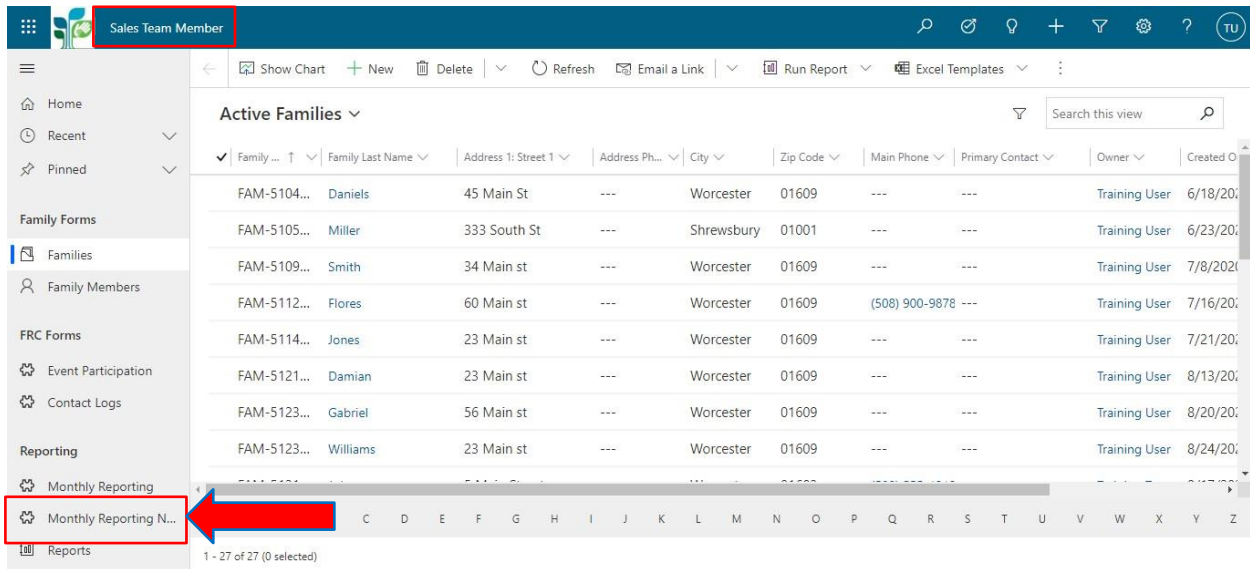
9. When saving your Tableau report use the following saving title:
2 page Dashboard_FRCName_MonthYear
10. Finally, remember to log out of Tableau when you are finished.

III. CRM Monthly Reporting Narrative

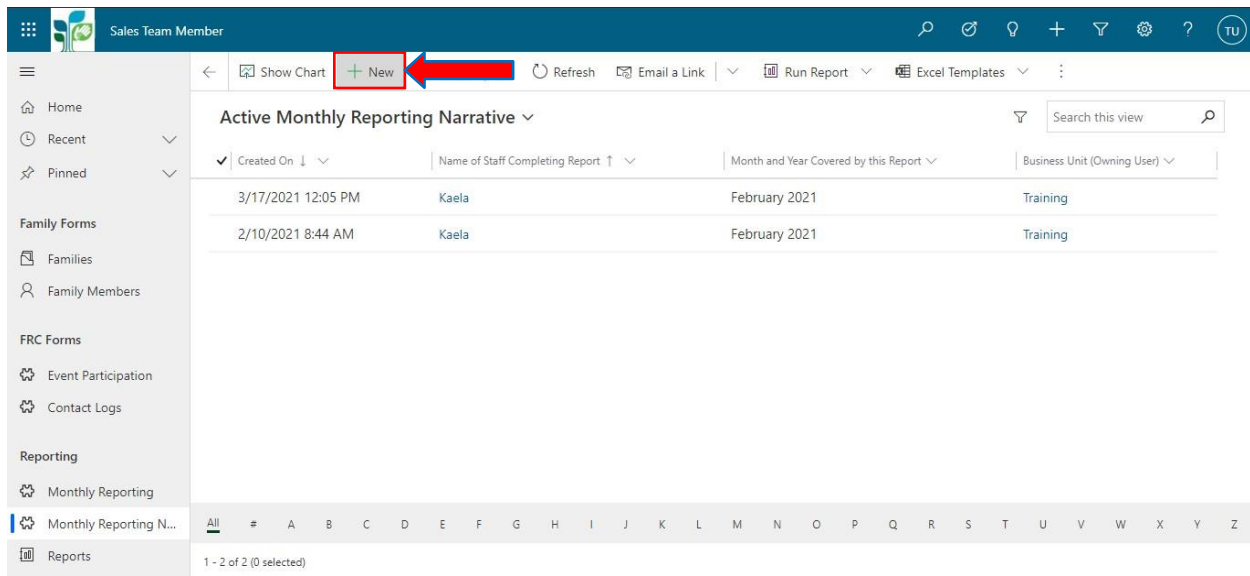
1. On the Community-Family Homepage, select the Family Resource Center CRM icon.



2. On the CRM homepage, check the top left corner, it should show “Sales Team Member”. Next, 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’.



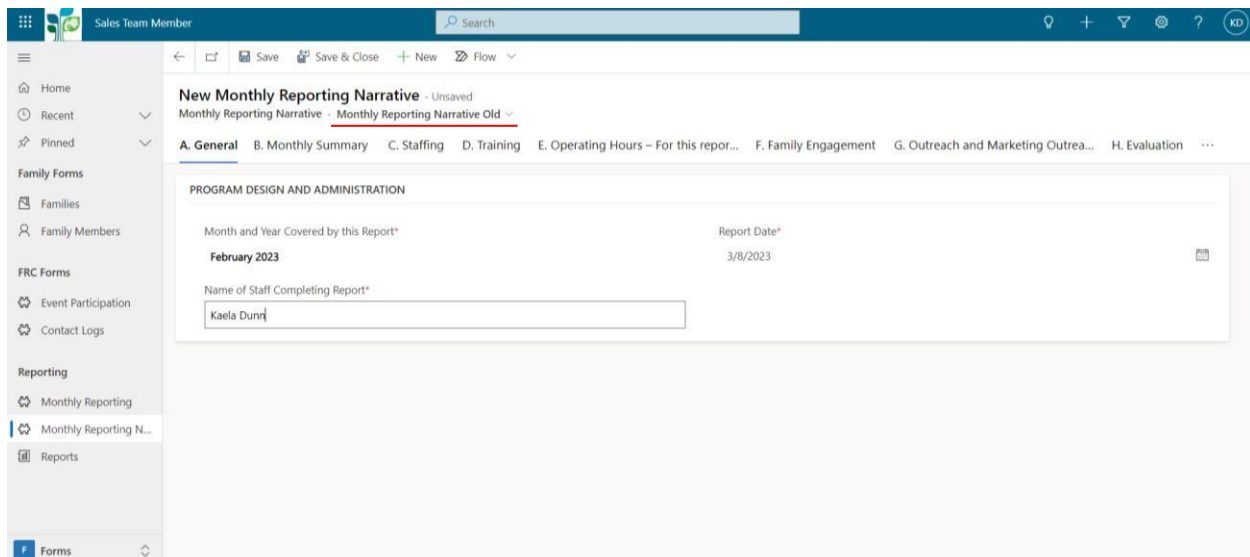
3. To create a new report, please select “+New”.



The screenshot shows a table titled "Active Monthly Reporting Narrative" with the following data:

Created On	Name of Staff Completing Report	Month and Year Covered by this Report	Business Unit (Owning User)
3/17/2021 12:05 PM	Kaela	February 2021	Training
2/10/2021 8:44 AM	Kaela	February 2021	Training

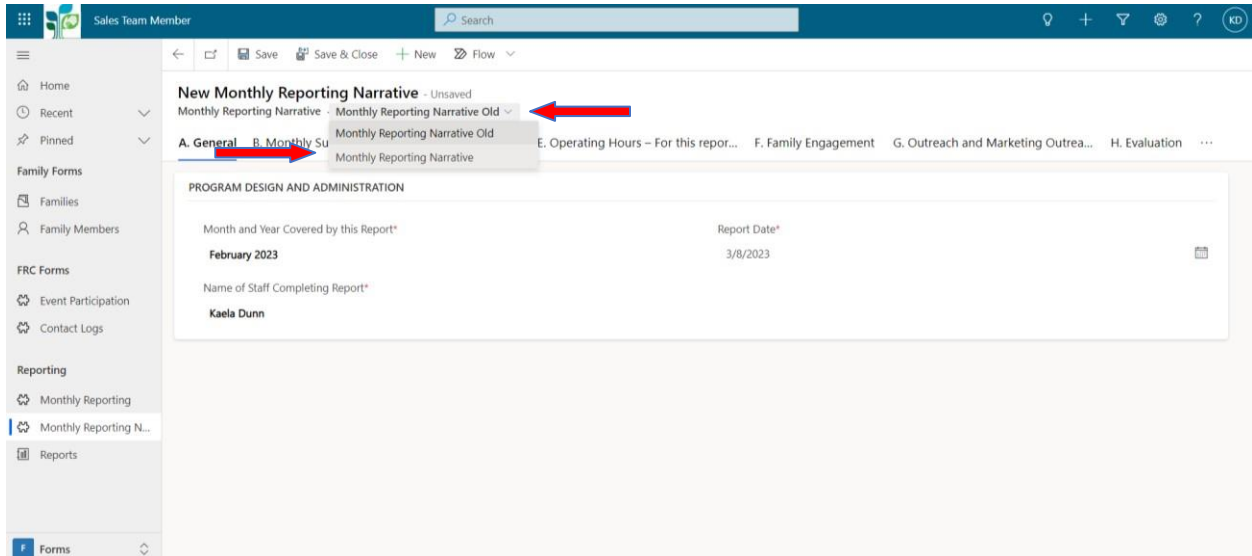
4. The default record that displays is “Monthly Reporting Narrative Old”. This is the monthly report for 2022 and prior.



The screenshot shows the "New Monthly Reporting Narrative" form with the following details:

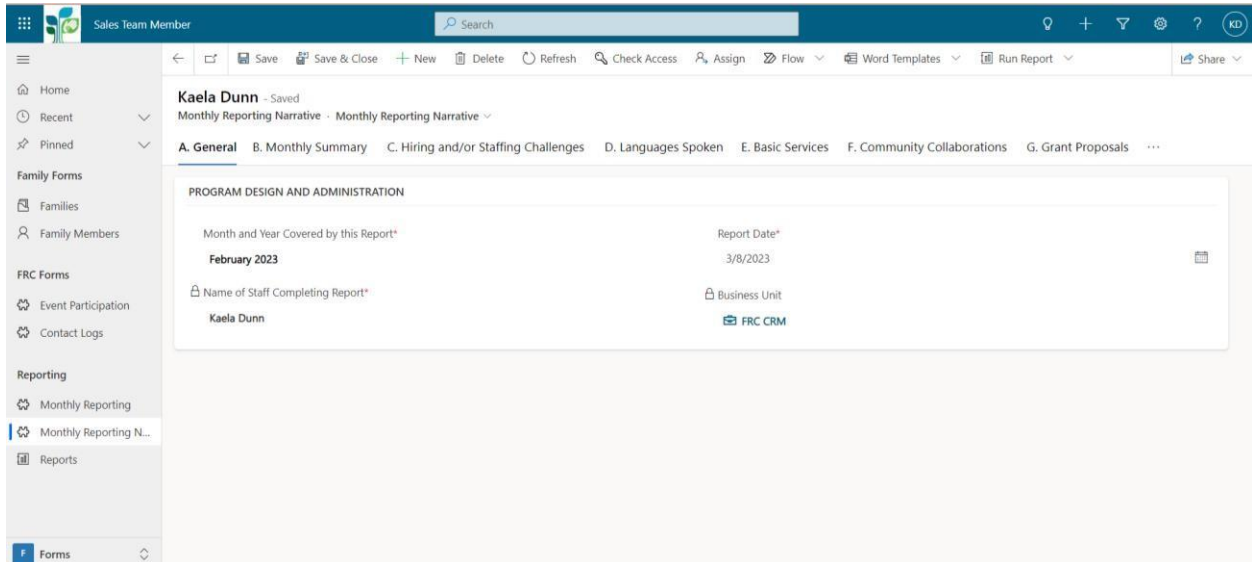
- Title:** New Monthly Reporting Narrative - Unsaved
- Navigation:** A. General | B. Monthly Summary | C. Staffing | D. Training | E. Operating Hours – For this repor... | F. Family Engagement | G. Outreach and Marketing Outrea... | H. Evaluation
- Section:** PROGRAM DESIGN AND ADMINISTRATION
- Month and Year Covered by this Report*:** February 2023
- Report Date*:** 3/8/2023
- Name of Staff Completing Report*:** Kaela Dunn

- a. To view the 2023 and beyond monthly report, select **“Monthly Reporting Narrative Old”**, then select **“Monthly Reporting Narrative”**.



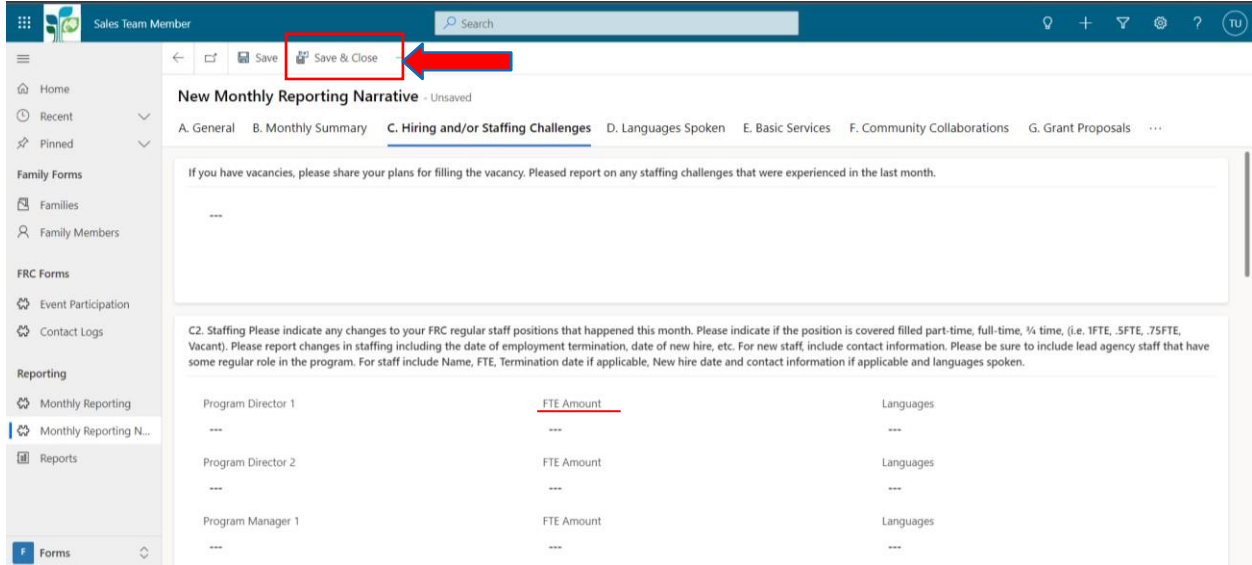
The screenshot shows a user interface for a 'Sales Team Member'. The main content area displays a form titled 'New Monthly Reporting Narrative - Unsaved'. The form is divided into sections: 'PROGRAM DESIGN AND ADMINISTRATION'. The 'Month and Year Covered by this Report*' field is set to 'February 2023', and the 'Report Date*' field is set to '3/8/2023'. The 'Name of Staff Completing Report*' field is set to 'Kaela Dunn'. A dropdown menu is open, showing options: 'Monthly Reporting Narrative', 'Monthly Reporting Narrative Old', and 'Monthly Reporting Narrative'. A red arrow points to the 'Monthly Reporting Narrative Old' option, and another red arrow points to the 'Monthly Reporting Narrative' option.

5. Proceed with filling out each section of the monthly report.



The screenshot shows the same user interface, but now the form is titled 'Kaela Dunn - Saved' and 'Monthly Reporting Narrative - Monthly Reporting Narrative'. The form is divided into sections: 'PROGRAM DESIGN AND ADMINISTRATION'. The 'Month and Year Covered by this Report*' field is set to 'February 2023', and the 'Report Date*' field is set to '3/8/2023'. The 'Name of Staff Completing Report*' field is set to 'Kaela Dunn'. The 'Business Unit' field is set to 'FRC CRM'. The form also includes sections for 'A. General', 'B. Monthly Summary', 'C. Hiring and/or Staffing Challenges', 'D. Languages Spoken', 'E. Basic Services', 'F. Community Collaborations', and 'G. Grant Proposals'.

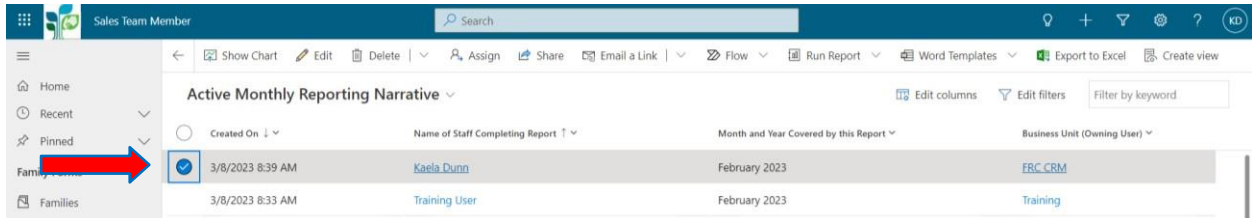
- a. Please remember to fill in all fields, including the staffing positions including 'FTE Amount'. Once the report is completed, select "Save & Close".



The screenshot shows the 'New Monthly Reporting Narrative' form. The 'Save & Close' button is highlighted with a red box and a red arrow. The form includes sections for 'Hiring and/or Staffing Challenges' and 'C2. Staffing'.

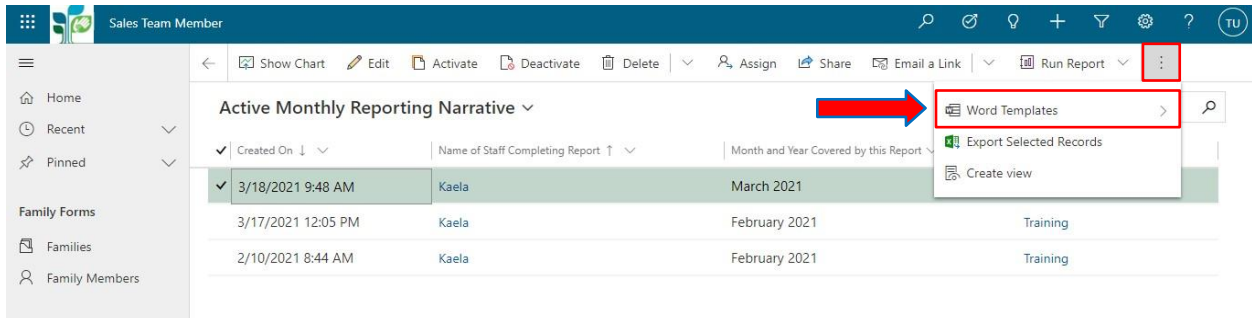
Program Director 1	FTE Amount	Languages
---	---	---
Program Director 2	FTE Amount	Languages
---	---	---
Program Manager 1	FTE Amount	Languages
---	---	---

6. On the main 'Active Monthly Reporting Narrative' page, select the Monthly Report you need to download. It will highlight in grey to show it has been selected.



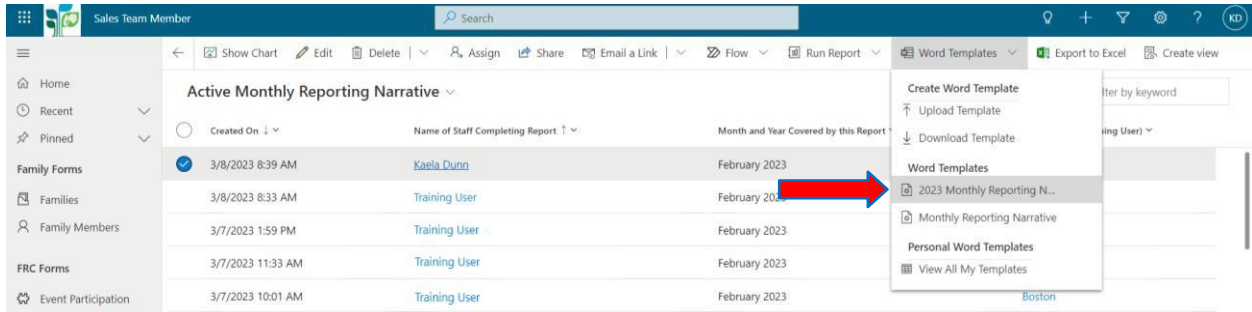
Created On	Name of Staff Completing Report	Month and Year Covered by this Report	Business Unit (Owning User)
3/8/2023 8:39 AM	Kaela Dunn	February 2023	FRC CRM
3/8/2023 8:33 AM	Training User	February 2023	Training

7. Select the 3 horizontal dots in the top right corner, then select "Word Templates".



Created On	Name of Staff Completing Report	Month and Year Covered by this Report	Business Unit (Owning User)
3/18/2021 9:48 AM	Kaela	March 2021	Training
3/17/2021 12:05 PM	Kaela	February 2021	Training
2/10/2021 8:44 AM	Kaela	February 2021	Training

- Select “**Monthly Reporting Narrative**” if you filled out the ‘*Monthly Reporting Narrative Old*’ or select “**2023 Monthly Reporting Narrative**” if you filled out the ‘*Monthly Reporting Narrative*’.



- There will be a pop-up at the bottom of your screen notifying you the download is complete. Select the Word Document to view your report.



- When saving your Monthly Report use the following saving title:
Monthly Narrative_FRCName_MonthYear

