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.

Table of Contents

Ι.	Signing into the Community-Family Homepage	. 2
II.	Monthly Tableau Report	. 5
III.	CRM Monthly Reporting Narrative	. 9



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".

🕥 New Tab 🗙 🕂		8	~	- 0	×
← → C ☆ G			6 1		K :
🔇 Simultaneous Inter 🧻 FRC Expansion Rese 🧻 Che	eck out later 🔋 UMass Links 📑 FRC Links 📋 Teams Info 📑 Helpful 🚦 CCC CRM	New tab New window New Incognit	o windo	w Ctrl+S	Ctrl+T Ctrl+N hift+N
		History Downloads Bookmarks			Ctrl+J
		Zoom	- 9	0% +	53
	Google	Print Cast Find More tools			Ctrl+P Ctrl+F
		Edit	Cut	Сору	Paste
	Q Search Google or type a URL	Settings Help			Þ
		Exit			
	Dynamics 365 Microsoft 36 Home Massachuset Tableau Server				

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**".

Ciana in	
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**".

MICIOSOT	Microsoft
demo.nv@community-tamily.org	demo.nv@community-family.org
verify your identity	Enter code
Text +X XXXXXXXX40	We texted your phone +X XXXXXXX40. Please enter the code to sign in.
Call +X XXXXXX40	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.

$\stackrel{\hbox{\scriptsize {\scriptsize \mbox{\scriptsize III}}}}{\longrightarrow}$ My Apps \sim	✓ Search apps	δ ² δ	?	D •
Apps				- 1
V Apps		Settings		- 1
Connections Center - Training	FHC - lableau			- 1
				_



II. Monthly Tableau Report

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

🔛 My Apps 🗸	/		✓ Search apps		8	?	D *
A	pps						1
	V Apps		1		🔅 Settings		
	Community Connections	Family Resource Center	: + FHC - Tableau				

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



b. Example 2:

>	NF 12	Q Search for views, metrics, workbooks, and more
+:+	Explore Top-Level Projects New • Select All	Sort By: Name (a-z) t ▼ Ⅲ
\$2 (1)		
3 2 2		0
0		
٢		
*		



- 3. <u>Your</u> 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	Q. Search for views, metrics, workboo	ks, and more
* **	DCF ☆ ◎ …		
···· •	Cowner Prusakov, Alex		
	New - Select All	Content Type: All	✓ Sort By: Type ✓ III ✓ ♥
	Type Name	Actions Value	Owner Modified
22	CF FRC Benchmarks		Hollick, Erik Oct 30, 2023, 4:38 AM
egg.	□ ☆		svcUHSTabCMD Oct 30, 2023, 4:29 AM
Q	DCF_Two_Page_Snapshot_Aggregate		svcUHSTabCMD Oct 30, 2023, 4:36 AM
	C K FRC_DCF_Satisfaction_Surveys_Count_Benchmark		Hollick, Erik Oct 30, 2023, 4:36 AM
0			

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 🔻
	-1
	I
	(AII)
	January
	February
	March
	April
	May May
	June
	July
	August
	September
	October
	November
	✓ December



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



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

Specific sheets from	this workbool	k		
	ante fita			
Dashboard Pa Dashbo	pard Pa 1. Fam	ily & Me 2. N	ew Ch	
of 11 S	elect All	Clear All	n l	
Scaling				
At most 1 page wide			•	
Paper Size	Orientat	tion		
	- Lands	cane		



- 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".

Const Constant				
Specific sheet	ts from this	workbook		52
1	~	d	-	-
-				
Dashboard Pa	Dashboard P	a 1 Family	& Ma	2 New
pashbudiu i a	Cashooardi		conviction of	
2 of 11	Select	All	Clear	All
Scaling				
At most 1 pag	e wide			3
Paper Size		Orientatio	on	
Unspecified	*	Landsca	pe	

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.

	DCF_Two_Page_Snpdf									Show all	
-	✓ Type here to search	0	Ħ	0×	9	NB	\$		へ 第二 <i>派</i> (10)	9:36 AM 3/18/2021	5

- 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*'.

III To Sales Team Mi	ember						م	ଷ୍ଟ ତ	+	7 🚳	? 🕠
=	🔶 🖾 Show Ch	art 🕂 New 🗎	Delete 🗸 🖒 Refre	sh 🖙 Email	a Link \mid \checkmark [Run Report	✓ I Excel ✓ I Excel	Templates	- :		
Home	Active Fam	ilies ~						7	7 Sea	rch this view	Q
✓ Pinned ✓	✓ Family ↑	\sim Family Last Name \vee	Address 1: Street 1 \vee	Address Ph	∽ City ∽	Zip Code 🗸	Main Phone \lor	Primary Con	tact \checkmark	\mid Owner \vee	Created O
	FAM-5104	Daniels	45 Main St		Worcester	01609	(200	8222		Training User	6/18/20
Family Forms	FAM-5105	Miller	333 South St	1000	Shrewsbury	01001	(2002)	2000		Training User	6/23/202
Families	FAM-5109	Smith	34 Main st		Worcester	01609		1222		Training User	7/8/2020
X Family Members	FAM-5112	Flores	60 Main st		Worcester	01609	(508) 900-987	8 8		Training User	7/16/20;
FRC Forms	FAM-5114	Jones	23 Main st		Worcester	01609		1000		Training User	7/21/20;
🔀 Event Participation	FAM-5121	Damian	23 Main st		Worcester	01609		1000		Training User	8/13/20;
🔀 Contact Logs	FAM-5123	Gabriel	56 Main st		Worcester	01609				Training User	8/20/20
Reporting	FAM-5123	Williams	23 Main st	1000	Worcester	01609				Training User	8/24/20;
🛱 Monthly Reporting	4							-			· · · · · · · · · · · · · · · · · · ·
🔀 Monthly Reporting N		C D	E F G H	I J K	L M	N O P	Q R	S T	U	v w x	Y Z
ᡂ Reports	1 - 27 of 27 (0 selecte	±)									



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

	Sales Team M	Member	Q	Ø	Ŷ	+	7	¢ ?	TU
≡		← 🖾 Show Chart + New	🕮 Excel Te	emplat	es 🗸	:			
俞	Home	Active Monthly Reporting Narrative \sim			7	Search	n this viev	v	Q
Ŀ	Recent \lor	denormal formation of the second s							
Ŵ	Pinned \checkmark	✓ Created On ↓ ∨ Name of Staff Completing Report ↑ ∨ Month and Year Covered by this Re	leport 🗸		Bu	siness Unit	(Owning l	lser) 🗸	
		3/17/2021 12:05 PM Kaela February 2021			Tra	aining			
Fan	nily Forms	2/10/2021 8:44 AM Kaela February 2021			Tra	aining			
	Families								
8	Family Members								
FRO	Forms								
公	Event Participation								
⇔	Contact Logs								
Rep	porting								
쑶	Monthly Reporting								
公	Monthly Reporting N	<u>All</u> # A B C D E F G H I J K L M N O P Q	Q R	S	т	U V	W	х	Y Z
[0]	Reports	1 - 2 of 2 (0 selected)							

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

III Sales Team Me	mber Search			Q	+	7	۲	?	KD
=	← 🖆 🖬 Save 🗳 Save & Close + New 🔊 Flow	~							
 Mome Becent ∨ Pinned ∨ 	New Monthly Reporting Narrative - Unsaved Monthly Reporting Narrative - Monthly Reporting Narrative OI A. General B. Monthly Summary C. Staffing D. Tra	I ~	F. Family Engagement	G. Outreach and Marketing Outr	ea	H. Eval	uation		
Family Forms	PROGRAM DESIGN AND ADMINISTRATION								
R Family Members	Month and Year Covered by this Report*	Rep	ort Date*					61	
FRC Forms C Event Participation C Contact Logs	Name of Staff Completing Report*		0/2023						
Reporting									
Monthly Reporting									
Monthly Reporting N Reports									
Forms 🗘									



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

III 📷 Sales Team Me	ember	P Search		0 + 7 ¢	9 ? (KD
=	← □ 🖬 Save 🖓 Save & Close +	New 🔊 Flow 🗸			
G Home Image: Constraint of the second se	New Monthly Reporting Narrativ Monthly Reporting Narrative - Monthly Report A. General B. Monthly Su Monthly Report	e - Unsaved ting Narrative Old - ing Narrative Old E. Operating Hours	s – For this repor F. Family Engagement G.	Outreach and Marketing Outrea H. Evalue	ition …
Family Forms	PROGRAM DESIGN AND ADMINISTRATION				
 Family Members FRC Forms Event Participation Contact Logs 	Month and Year Covered by this Report* February 2023 Name of Staff Completing Report* Kaela Dunn		Report Date* 3/8/2023		
Reporting					
 ↔ Monthly Reporting ☆ Monthly Reporting N 					
त्नि Reports					
F Forms					

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

	Sales Team Me	nber 🖉 Search	Q + Q 🐵 ? 🔞
=		E Save B Save Close + New Delete O Refresh Check Access A, Assign Set Flow How G Word Temp How Set Flow Set	plates $$
	Home V	Kaela Dunn - Saved Monthly Reporting Narrative - Monthly Reporting Narrative - A. General B. Monthly Summary C. Hiring and/or Staffing Challenges D. Languages Spoken E. Basic Services	ity Collaborations G. Grant Proposals ····
Famil	ly Forms Families	PROGRAM DESIGN AND ADMINISTRATION	
RC FRC F	Family Members Forms Event Participation Contact Logs	Month and Year Covered by this Report* Report Date* February 2023 3/8/2023 △ Name of Staff Completing Report* △ Business Unit Kaela Dunn ➡ FRC CRM	1
Repo	rting		
	Monthly Reporting		
	Monthly Reporting N		
F	Forms 🗘		



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

💠 📰 🚮 Sales Team Me	nber 🔎 Search		Q + ∀ © ?	TU
=	- 🗠 🖬 Save 🖁 Save & Close -			
 in Home in Recent ∨ in Recent ∨ in Recent ∨ 	New Monthly Reporting Narrative - Unsaved A. General B. Monthly Summary C. Hiring and/or Staffing	Challenges D. Languages Spoken E. Basic Services F. Co	mmunity Collaborations G. Grant Proposals	
Family Forms	If you have vacancies, please share your plans for filling the vacancy.	Pleased report on any staffing challenges that were experienced in th	e last month.	
Families Family Members FRC Forms				
Contact Logs	C2. Staffing Please indicate any changes to your FRC regular staff po Vacant), Please report changes in staffing including the date of emp some regular role in the program. For staff include Name, FTE, Term	sitions that happened this month. Please indicate if the position is cov oyment termination, date of new hire, etc. For new staff, include conta nation date if applicable, New hire date and contact information if ap	ered filled part-time, full-time, ¼ time, (i.e. 1FTE, .5FTE, .7SFTE, ct information. Please be sure to include lead agency staff that hav licable and languages spoken.	e
😂 Monthly Reporting	Program Director 1	FTE Amount	Languages	
Monthly Reporting N				
I Reports	Program Director 2 Program Manager 1	FTE Amount FTE Amount	Languages Languages	
F Forms				

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.

		Sales Team M	ember		<mark>ب</mark> ۹	earch							Q		Y	۲	? (KD
=			\leftarrow	😨 Show Chart 🥒 Edit	🗒 Delete 🗸 🔗	Assign 🛛 🖻 Sh	nare 🕞] Email a Link \mid \vee	🔊 Flow 🗸	🗐 Run Report 🖂	🖷 Word Templa	tes 🗸	🕼 Exp	ort to I	xcel	艮 Creat	e view	
ଜ	Home		1	active Monthly Report	ting Narrative 🗸						Edit columns	₹ E	dit filters	Fil	ter by i	eyword		
٩	Recent	\sim	0															
\$?	Pinned	<u> </u>			Name of sta	r completing kept	JIL I -		Month and H	ear Covered by this Report	•		business O	at (Own	ing user	, -		
Fam	,			3/8/2023 8:39 AM	Kaela Dunr				February 20	23		1	FRC CRM					
	Families			3/8/2023 8:33 AM	Training Us	er			February 20	23		1	Training					

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

🗰 🏹 Sales Team M	nber P S Q	+ 7 @ ?	TU
=	🔶 🖾 Show Chart 🖉 Edit 🖸 Activate 🗋 Deactivate 📋 Delete 🗸 🖄 Assign 🖻 Share 🖾 Email a Link 🗸 🗐 F	Run Report \vee 🔡	
命 Home	Active Monthly Reporting Narrative ~	tes >	Q
Recent	✓ Created On ↓ ∨ Name of Staff Completing Report ↑ ∨ Month and Year Covered by this Report ↓	ed Records	
	✓ 3/18/2021 9:48 AM Kaela March 2021		
Family Forms	3/17/2021 12:05 PM Kaela February 2021 Trai	ning	
A Families	2/10/2021 8:44 AM Kaela February 2021 Trai	ning	
X Family Members			
50.0 F			



8. 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*'.

III Sales Team M	ember	₽ Search		Q +	- 7 🚳 ? 😡
=	← 🕼 Show Chart 🖉 Edit 📋 Delete \	- 🔗 Assign 🔄 Share 🛯 Email a Link 🗸	🔊 Flow \vee 🔟 Run Report 🗸	🗐 Word Templates \vee 🛛 🖉 Export	to Excel 🛛 🗟 Create view
 A Home ○ Recent ✓ 	Active Monthly Reporting Narrative 🗸			Create Word Template	Iter by keyword
🖈 Pinned 🗸 🗸	Created On ↓ ∽ Na	ame of Staff Completing Report $^{\uparrow}$ $\stackrel{\checkmark}{\sim}$	Month and Year Covered by this Report '		iing User) 🌱
Family Forms	S/8/2023 8:39 AM	aela Dunn	February 2023	Word Templates	
Families	3/8/2023 8:33 AM	aining User	February 202	2023 Monthly Reporting N	
8 Family Members	3/7/2023 1:59 PM Tr	aining User	February 2023	Monthly Reporting Narrative	
FRC Forms	3/7/2023 11:33 AM	raining User	February 2023	I View All My Templates	
🔀 Event Participation	3/7/2023 10:01 AM	raining User	February 2023	Boston	

9. 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.



10. When saving your Monthly Report use the following saving title: Monthly Narrative_FRCName_MonthYear

- AutoSave 💷 🖪 🏸 🕐 🗅 🖻	🖭 🖧 〕 🤝 🗢 2023 Monthly Reporting Narrative 3	-8-2023 9-13-16 AM.docx - Protecte • Saved 🗸 🔎	Dunn, Kaela 🔍 🖪 🗕 🔿 🗙
File Home Insert Design L	ayout References Mailings Review View H	elp Foxit PDF	🖵 Comments 🛛 🖻 Share 🗠
PROTECTED VIEW This file has been verified	ed by Microsoft Defender Advanced Threat Protection and it hasn't d	etected any threats. If you need to edit this file, click enable editing,	Enable Editing ×
L .	······································	4	#1 · · · ·
	Monthly Na	rrative Report	
-	A. General		1 [°]
	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	Business Unit FRC CRM	
- - - N	B. Monthly Summary - Reflecting on the past much convened and/or goals achieved during the month encountered.	onth, please provide a summary of the activities h. Please include challenges that may have been	-
- - - -	C. Hiring and/or Staffing Challenges – If you hat the vacancy. Pleased report on any staffing chall	ave vacancies, please share your plans for filling enges that were experienced in the last month.	
8	C.2 Staffing - Please indicate any changes to you month. Please indicate if the position is covered f	ur FRC regular staff positions that happened this illed part-time, full-time, ¾ time, (i.e. 1FTE, .5FTE, parineluding the date of employment termination	
Page 1 of 2 434 words Text Predictions: On		ل Focus	