



## 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<sup>th</sup> 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<sup>st</sup> and 15<sup>th</sup> 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.

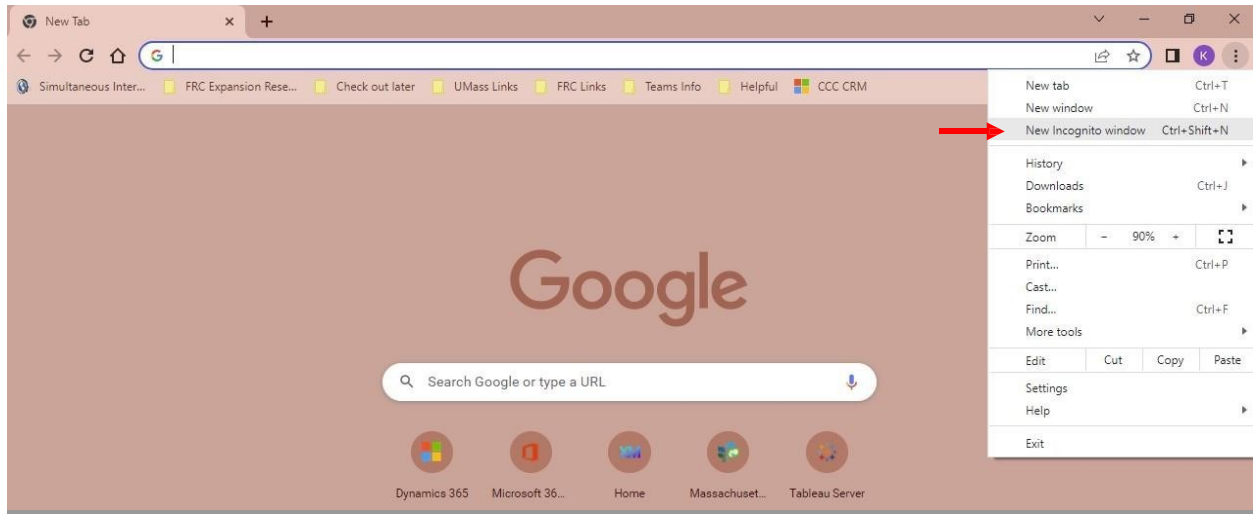
This job aid is to help you with exporting both portions of your monthly report requirement. If you do not have @Comunity-Family.org credentials or have any questions, please contact [FRCHelp@umassmed.edu](mailto:FRCHelp@umassmed.edu).

### Table of Contents

|      |                                                              |    |
|------|--------------------------------------------------------------|----|
| I.   | Signing into the Community-Family Homepage .....             | 2  |
| II.  | Monthly Tableau Report.....                                  | 5  |
| III. | CRM Monthly Reporting Narrative .....                        | 9  |
|      | <u>a.</u> Cloning a Monthly Reporting Narrative record ..... | 10 |
|      | <u>b.</u> Creating a Monthly Reporting Narrative record..... | 11 |
|      | <u>c.</u> Completing the Monthly Reporting Narrative .....   | 11 |
|      | <u>d.</u> Exporting the Monthly Reporting Narrative.....     | 12 |

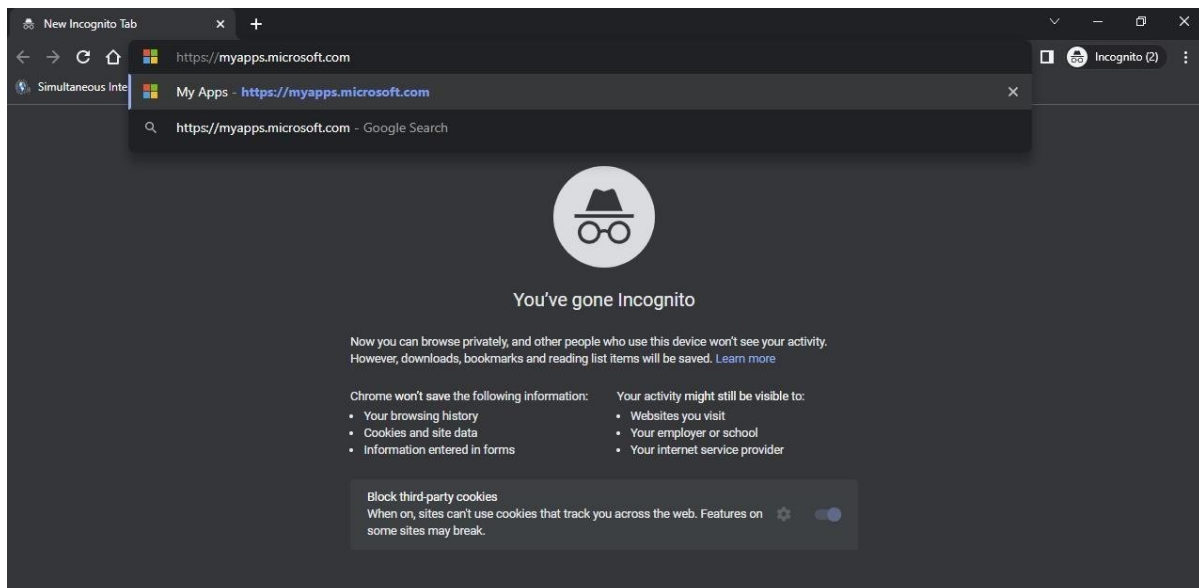
## I. Signing into the Community-Family Homepage

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”**.

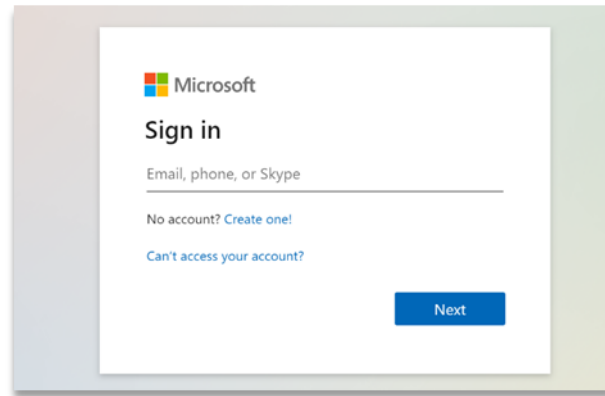


2. Copy and paste the following link into a Google Chrome Incognito window.

<https://myapps.microsoft.com>

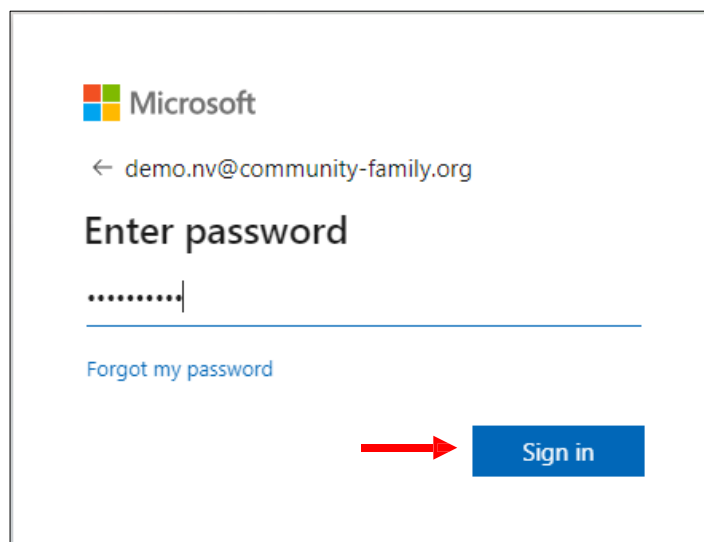


3. A Microsoft sign in page will display. Enter your username (e.g., Kaela.Dunn@Community-Family.org) and select **“Next”**.

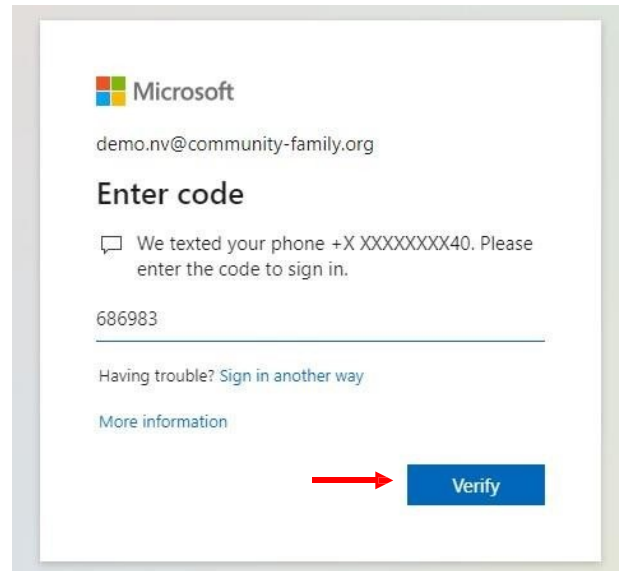
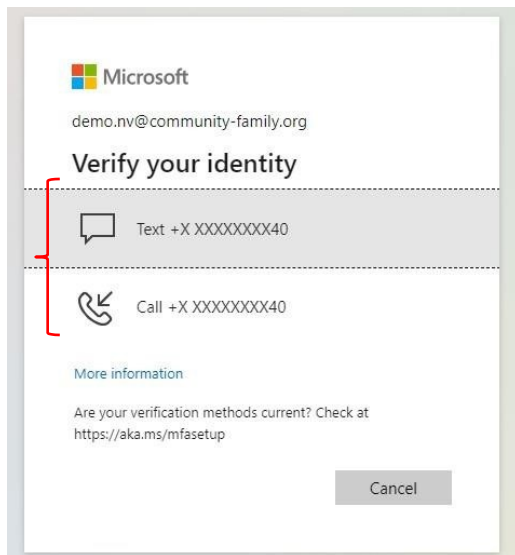


NOTE: If you do not use Google Chrome Incognito, Microsoft may automatically log you into your most recently used account. By using Incognito browsing, you will easily be able to enter the appropriate username and password.

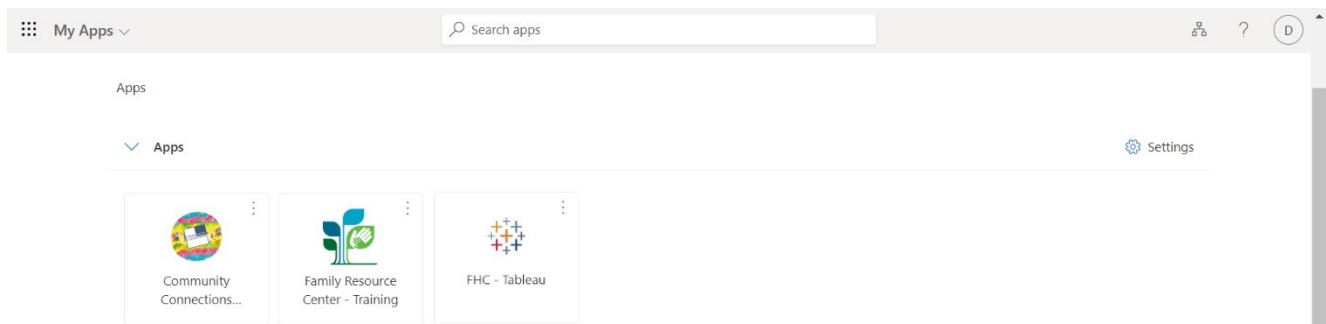
4. Next, you will be prompted to enter your password.



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”**.

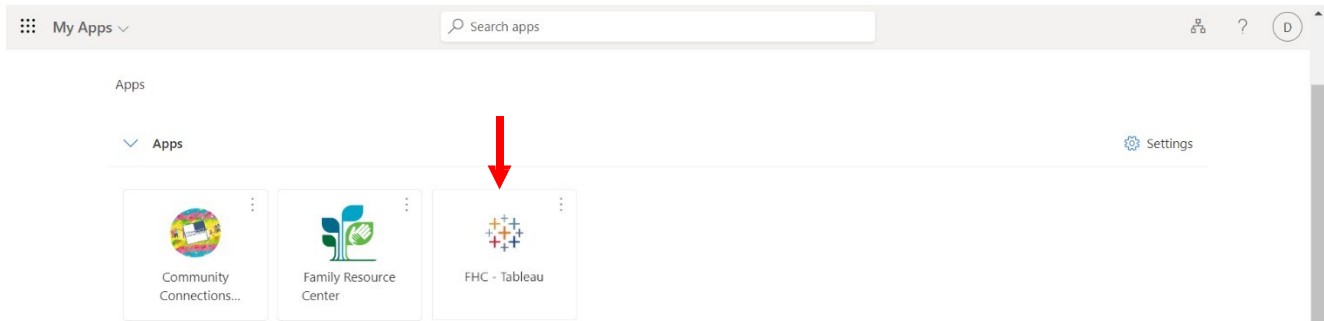


6. The Community-Family Homepage will appear, and you will see the appropriate applications you have access to.



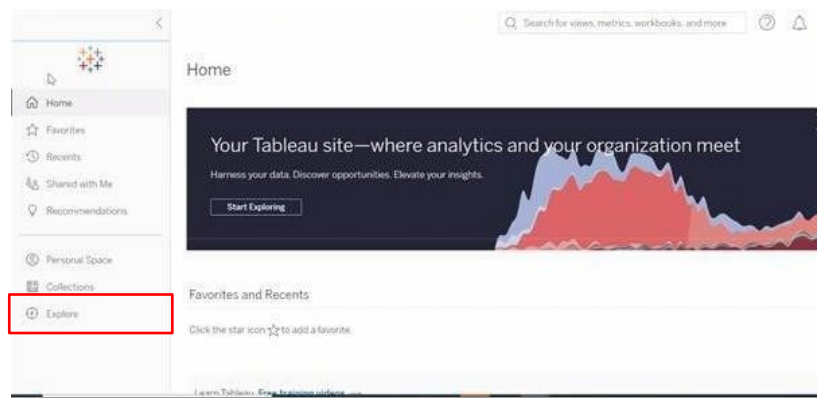
## II. Monthly Tableau Report

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

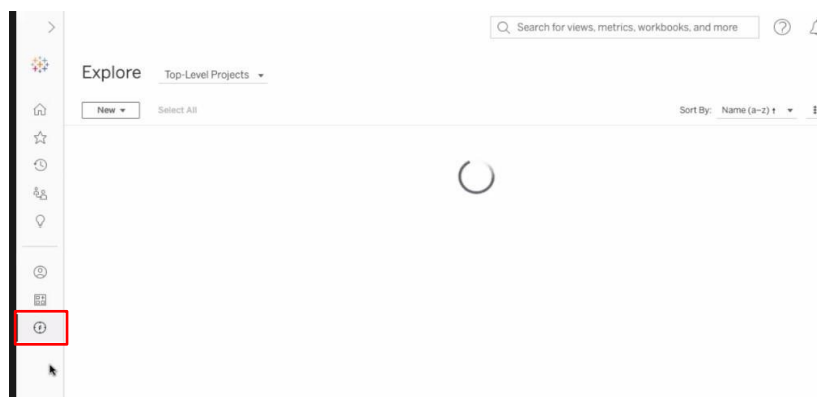


2. Select the “**Explore**” term and/or icon displayed on the left side of the screen.

- a. Example 1:

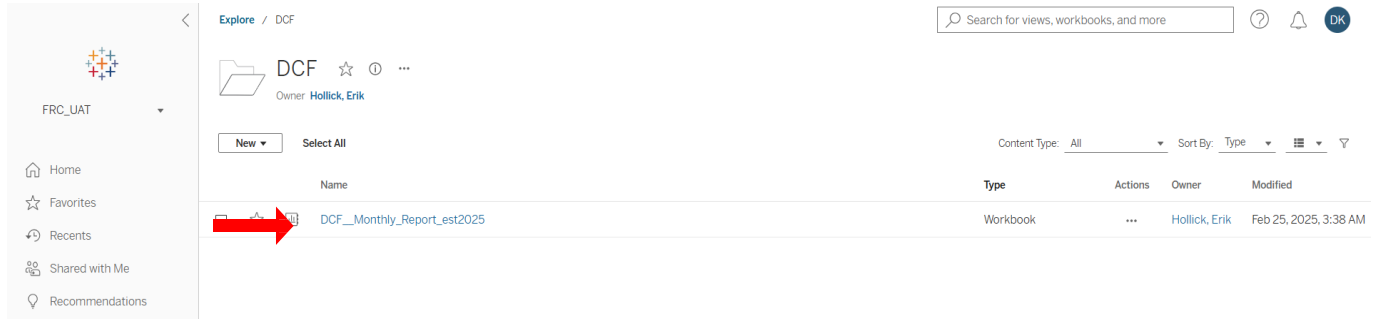


- b. Example 2:



### 3. Select “FRC\_YourSite’sLocation\_Monthly\_Report\_est.2025”.

- Note the DCF folder shown below is an example. Again, your FRC Tableau workbook will display along with the appropriate site reports.

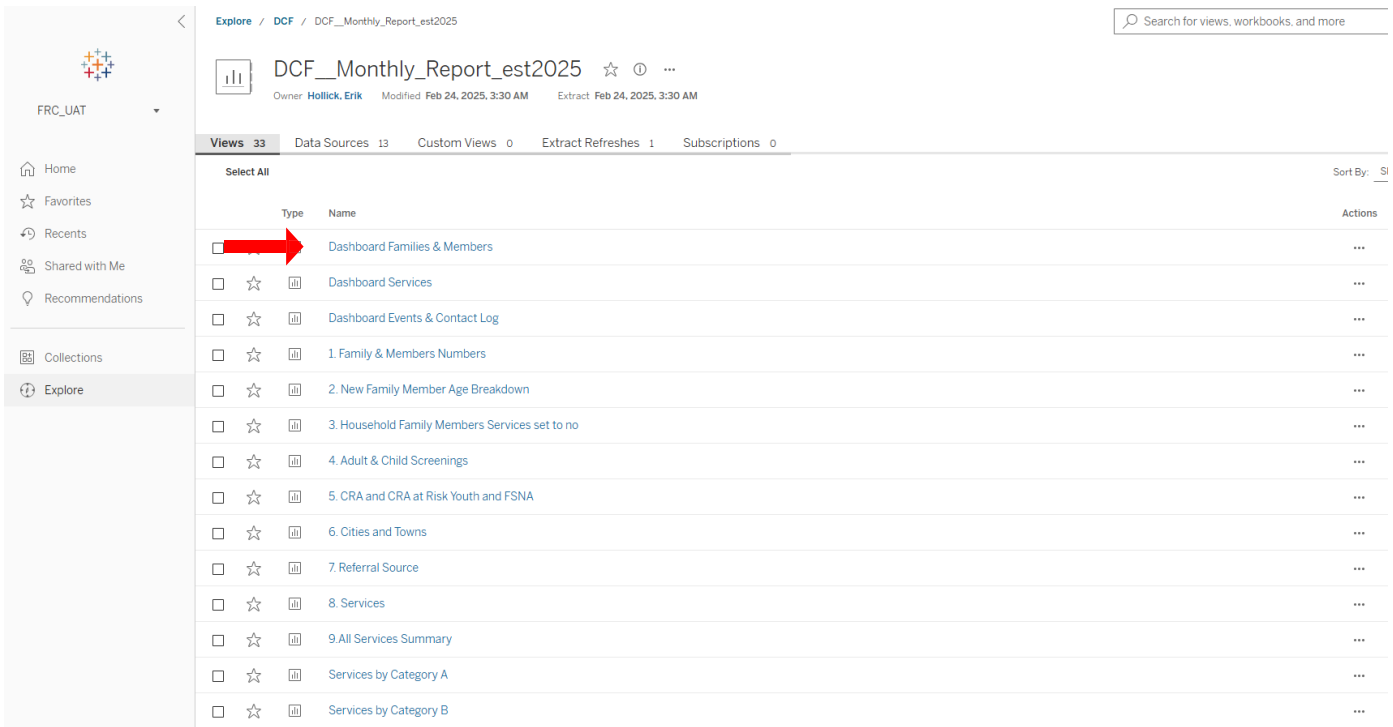


The screenshot shows the Tableau Explore interface. On the left is a sidebar with navigation options: Home, Favorites, Recents, Shared with Me, and Recommendations. The main area displays the 'DCF' folder, owned by 'Hollick, Erik'. Below the folder name is a table listing contents. A red arrow points to the row for 'DCF\_Monthly\_Report\_est2025', which is a 'Workbook' owned by 'Hollick, Erik' and modified on 'Feb 25, 2025, 3:38 AM'.

| Name                       | Type     | Actions | Owner         | Modified              |
|----------------------------|----------|---------|---------------|-----------------------|
| DCF_Monthly_Report_est2025 | Workbook | ...     | Hollick, Erik | Feb 25, 2025, 3:38 AM |

### 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.

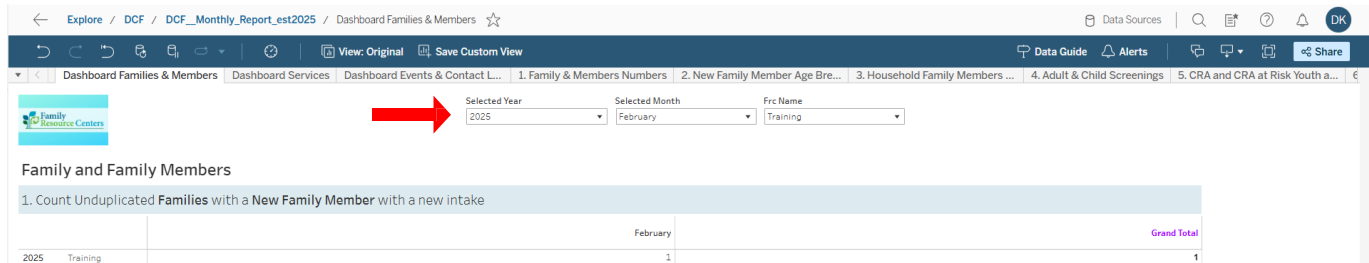
- Select “Dashboard Families & Members”.



The screenshot shows the Tableau Explore interface for the 'DCF\_Monthly\_Report\_est2025' folder. The sidebar on the left includes 'Collections' and 'Explore' options. The main area displays a list of views. A red arrow points to the first view, 'Dashboard Families & Members'.

| Type      | Name                                           | Actions |
|-----------|------------------------------------------------|---------|
| Dashboard | Dashboard Families & Members                   | ...     |
| Dashboard | Dashboard Services                             | ...     |
| Dashboard | Dashboard Events & Contact Log                 | ...     |
| Table     | 1. Family & Members Numbers                    | ...     |
| Table     | 2. New Family Member Age Breakdown             | ...     |
| Table     | 3. Household Family Members Services set to no | ...     |
| Table     | 4. Adult & Child Screenings                    | ...     |
| Table     | 5. CRA and CRA at Risk Youth and FSNA          | ...     |
| Table     | 6. Cities and Towns                            | ...     |
| Table     | 7. Referral Source                             | ...     |
| Table     | 8. Services                                    | ...     |
| Table     | 9. All Services Summary                        | ...     |
| Table     | Services by Category A                         | ...     |
| Table     | Services by Category B                         | ...     |

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

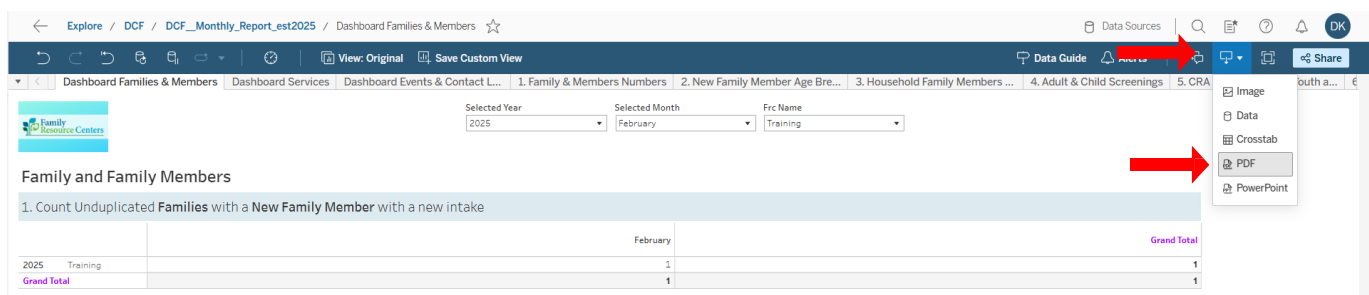


Family and Family Members

1. Count Unduplicated Families with a New Family Member with a new intake

|      |          | February | Grand Total |
|------|----------|----------|-------------|
| 2025 | Training | 1        | 1           |

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



Family and Family Members

1. Count Unduplicated Families with a New Family Member with a new intake

|             |          | February | Grand Total |
|-------------|----------|----------|-------------|
| 2025        | Training | 1        | 1           |
| 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".

Download PDF

Include

Specific sheets from this workbook

☒

Dashboard Families & Members

☒

Dashboard Services

3 of 33

Select All

Clear All

Scaling

Automatic

Page Size

Unspecified

Orientation

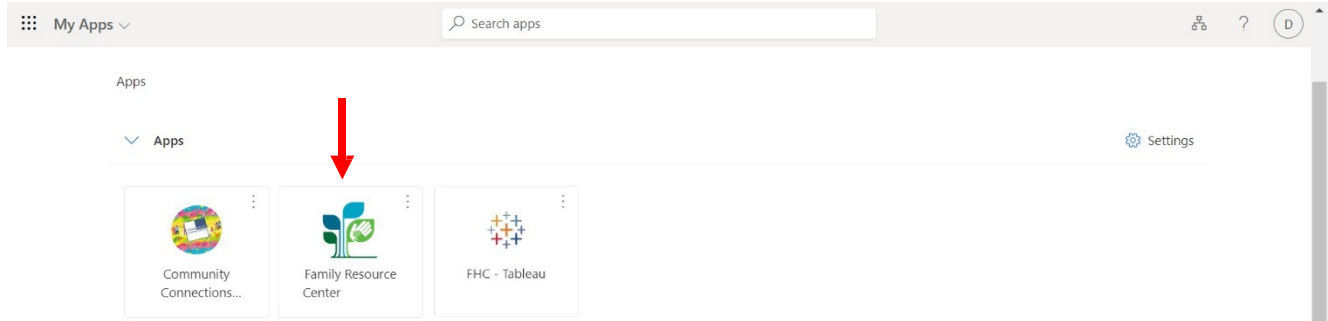
Portrait

Download

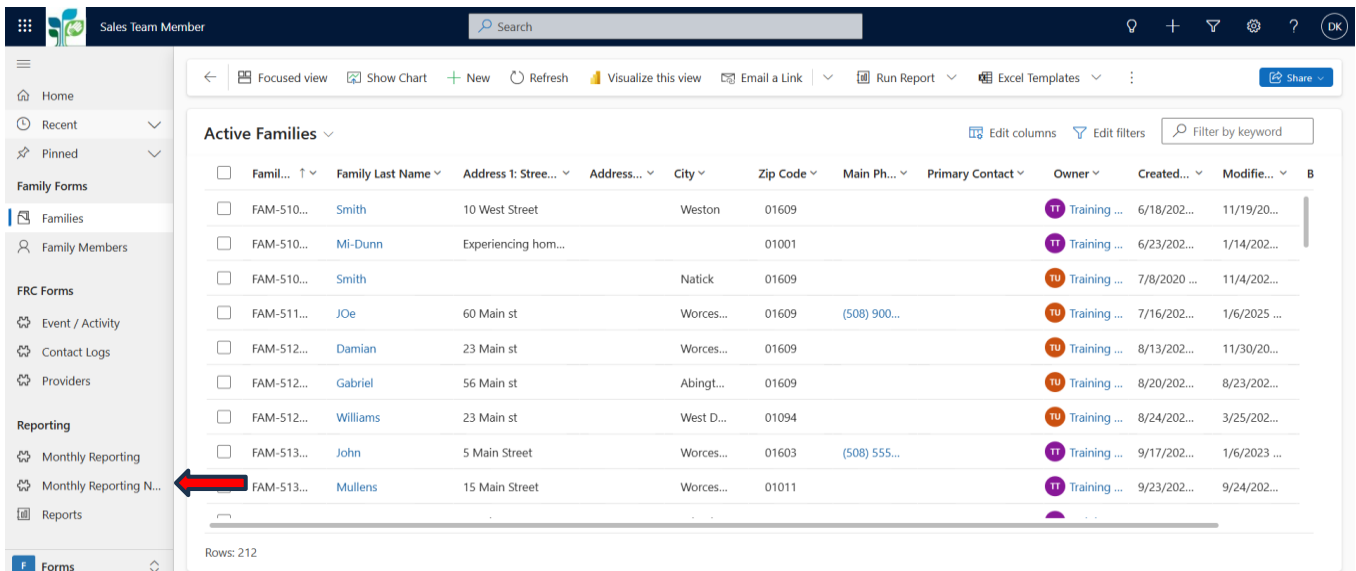


### III. CRM Monthly Reporting Narrative

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



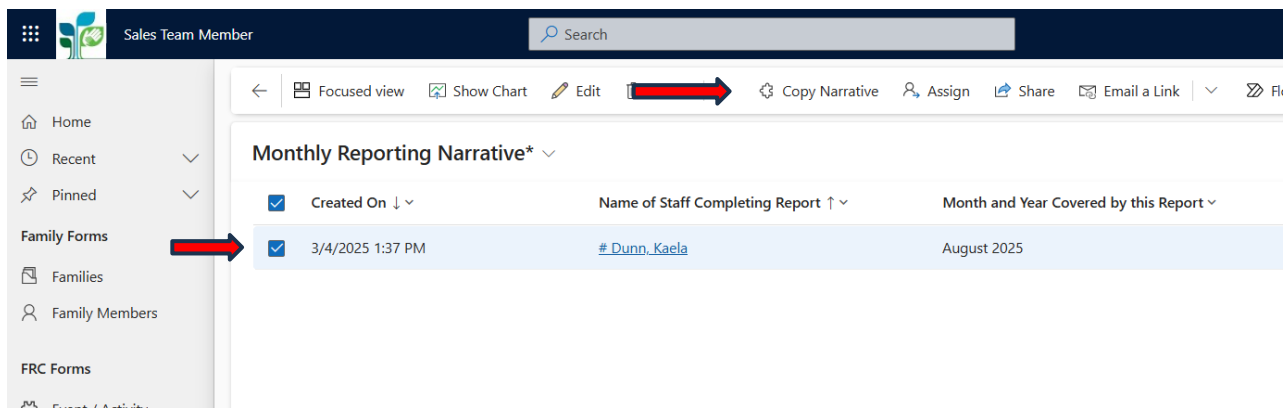
2. On the CRM homepage, select **“Monthly Reporting Narrative”**.
  - a. The 1<sup>st</sup> tab states, *‘Monthly Reporting’*, do not select that as it is the old report. Locate the 2<sup>nd</sup> tab that states *‘Monthly Reporting Narrative’*.



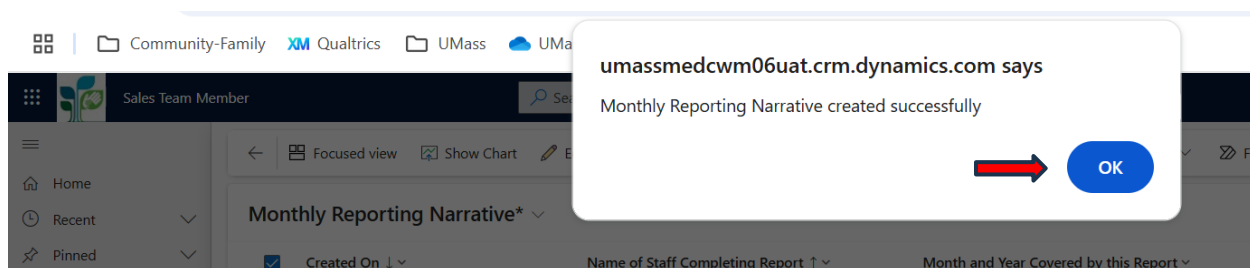
## a. Cloning a Monthly Reporting Narrative record

1. “Cloning” a Monthly Reporting Narrative record is a way to copy an existing record’s content into a new record. If you would like to do so, select the existing Monthly Reporting Narrative record you want to clone, then select **“Copy Narrative”**.

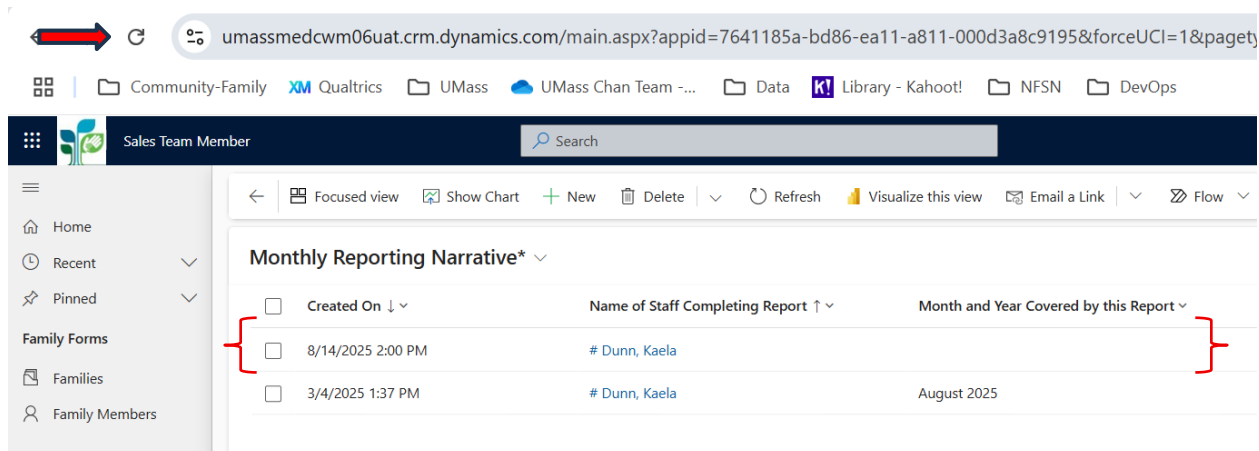
**\*Note:** The only content in the Monthly Reporting Narrative record that clones is the ‘F. Hiring and/or Staffing Challenges’ section.



2. A pop-up will appear on your screen confirming the record was cloned. Select **“Ok”**.

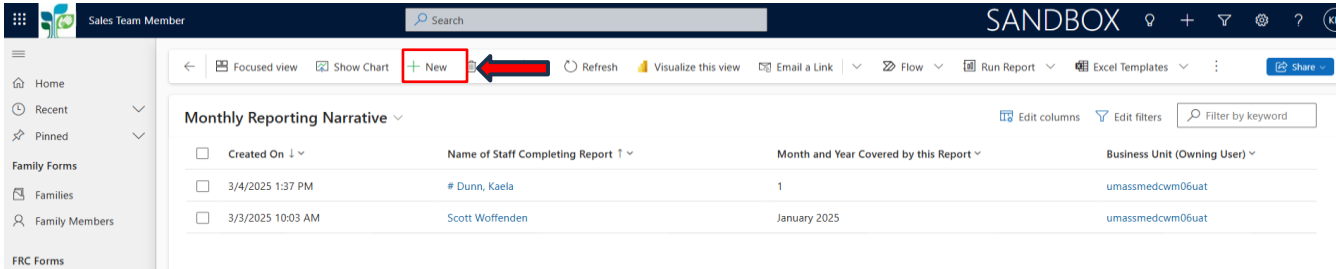


3. After the pop-up disappears, you will see the original screen you were on. Now, you must refresh the page to see the cloned record. Select the refresh icon on your web page and notice the new record added to your screen. It will be easy to spot because the record’s “Month and Year Covered by this Report” will be blank.



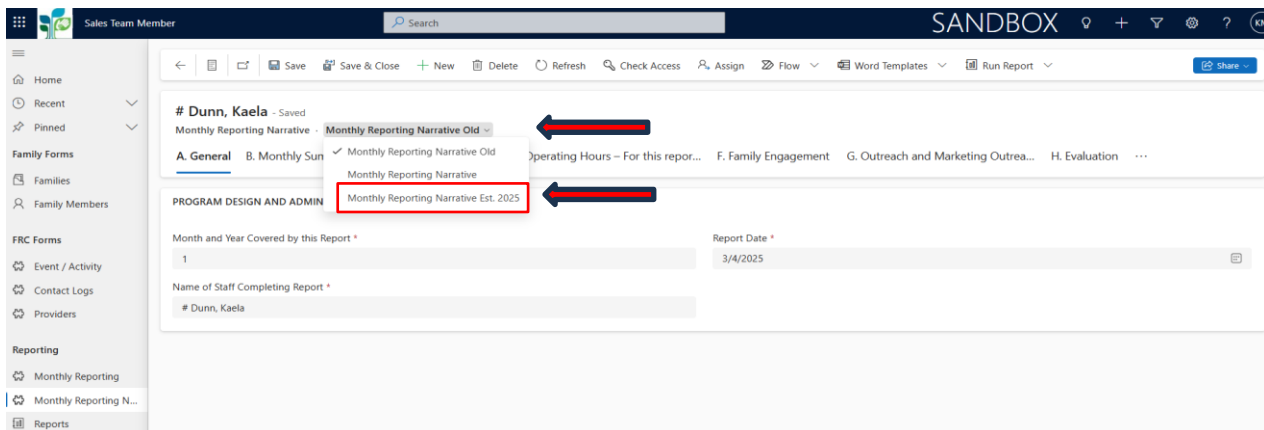
## b. Creating a Monthly Reporting Narrative record

1. If you would like to create a brand new Monthly Reporting Narrative record, select “+New”, at the top of the Monthly Reporting Narrative homepage.

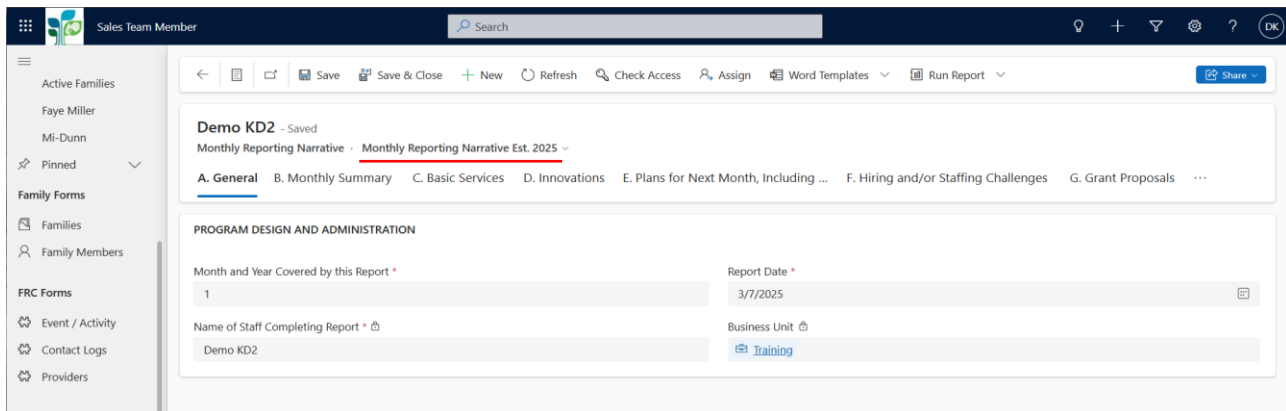


## c. Completing the Monthly Reporting Narrative

1. It's important you double check you are using the correct version of the Monthly Reporting Narrative. The most recent version is titled “**Monthly Reporting Narrative Est. 2025**”.
  - a. If you need to change the version, select the menu shown below, then select “**Monthly Reporting Narrative Est. 2025**”.
  - b. The “Monthly Reporting Narrative” version was used in 2023 through January 2025.
  - c. The “Monthly Reporting Narrative Old” version was used in 2022 and prior.

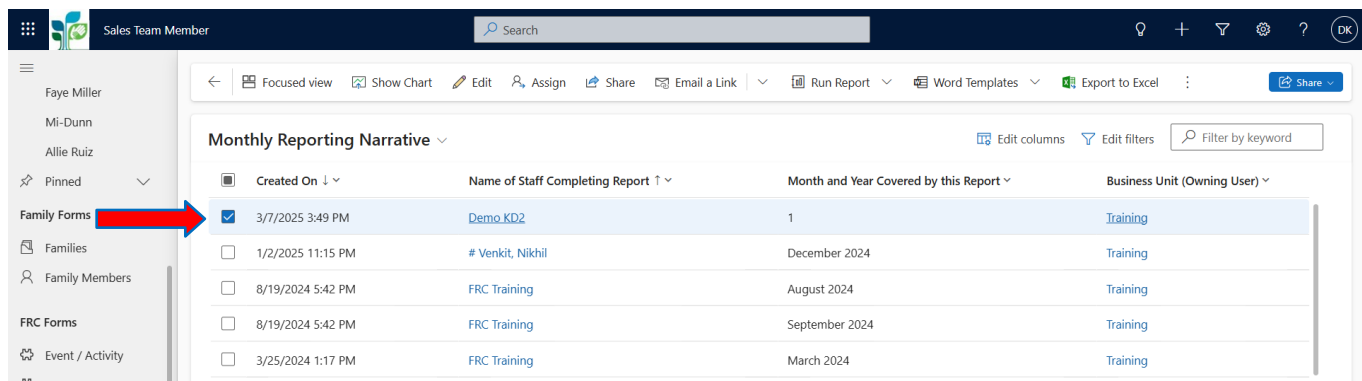


- After ensuring you are in using the “**Monthly Reporting Narrative Est.2025**” form. Proceed with filling out each section.



## d. Exporting the Monthly Reporting Narrative

- 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.



| Created On                                           | Name of Staff Completing Report | Month and Year Covered by this Report | Business Unit (Owning User) |
|------------------------------------------------------|---------------------------------|---------------------------------------|-----------------------------|
| <input checked="" type="checkbox"/> 3/7/2025 3:49 PM | Demo KD2                        | 1                                     | Training                    |
| <input type="checkbox"/> 1/2/2025 11:15 PM           | # Venkit, Nikhil                | December 2024                         | Training                    |
| <input type="checkbox"/> 8/19/2024 5:42 PM           | FRC Training                    | August 2024                           | Training                    |
| <input type="checkbox"/> 8/19/2024 5:42 PM           | FRC Training                    | September 2024                        | Training                    |
| <input type="checkbox"/> 3/25/2024 1:17 PM           | FRC Training                    | March 2024                            | Training                    |

- 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.

Sales Team Member

Word Templates

Create Word Template

Upload Template

Download Template

Word Templates

2023 Monthly Reporting N...

Monthly Reporting Narrative

Monthly Reporting Narrativ...

| Created On                                           | Name of Staff Completing Report | Month and Year Covered |
|------------------------------------------------------|---------------------------------|------------------------|
| <input checked="" type="checkbox"/> 3/7/2025 3:49 PM | Demo KD2                        | 1                      |
| <input type="checkbox"/> 1/2/2025 11:15 PM           | # Venkit, Nikhil                | December 2024          |
| <input type="checkbox"/> 8/19/2024 5:42 PM           | FRC Training                    | August 2024            |
| <input type="checkbox"/> 8/19/2024 5:42 PM           | FRC Trainina                    | September 2024         |

- 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.



- Please ensure you edit the Monthly Reporting Narrative's file name to:  
**Monthly Narrative\_FRCName\_MonthYear**

Monthly Reporting Narrative Est. 2025 3-7-2025 3:18:19 PM • Saved

Home Insert Draw Design Layout References Mailings Review View Help Docusign Foxit PDF Table Design Table Layout Comments Editing

Family Resource Centers

Monthly Narrative Report Est. 2025

|                                                                                                                                                                                                                       |                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <b>A. General</b>                                                                                                                                                                                                     |                               |
| <b>PROGRAM DESIGN AND ADMINISTRATION</b>                                                                                                                                                                              |                               |
| <b>Month and Year Covered by this Report</b>                                                                                                                                                                          | <b>Report Date</b> 3/7/2025   |
| <b>Name of Staff Completing Report</b>                                                                                                                                                                                | <b>Business Unit</b> Training |
| Demo KD2                                                                                                                                                                                                              |                               |
| <b>B. Monthly Summary</b> - Reflecting on the past month, please provide a summary of the activities convened and/or goals achieved during the month. Please include challenges that may have been encountered.       |                               |
| 2                                                                                                                                                                                                                     |                               |
| <b>C. Basic Services</b> – Reflecting on the Monthly Tableau Report, please share how things went with new intakes, screenings, CRA/CRA at risk FSNAs, family support plan, evidence-based classes, and other groups. |                               |
| 3                                                                                                                                                                                                                     |                               |
| <b>D. Innovations and/or New Strategy Initiatives</b>                                                                                                                                                                 |                               |
| 4                                                                                                                                                                                                                     |                               |

413 words Text Predictions: On Accessibility: Investigate