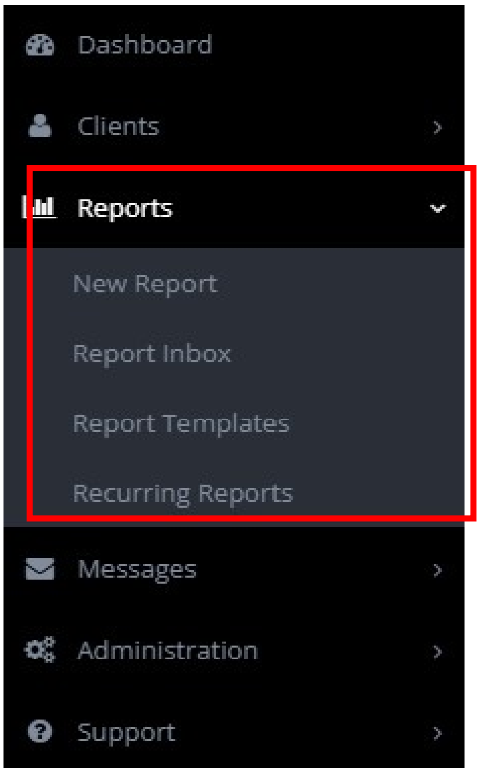
Link2Feed Reports

Updated 5-11-2023

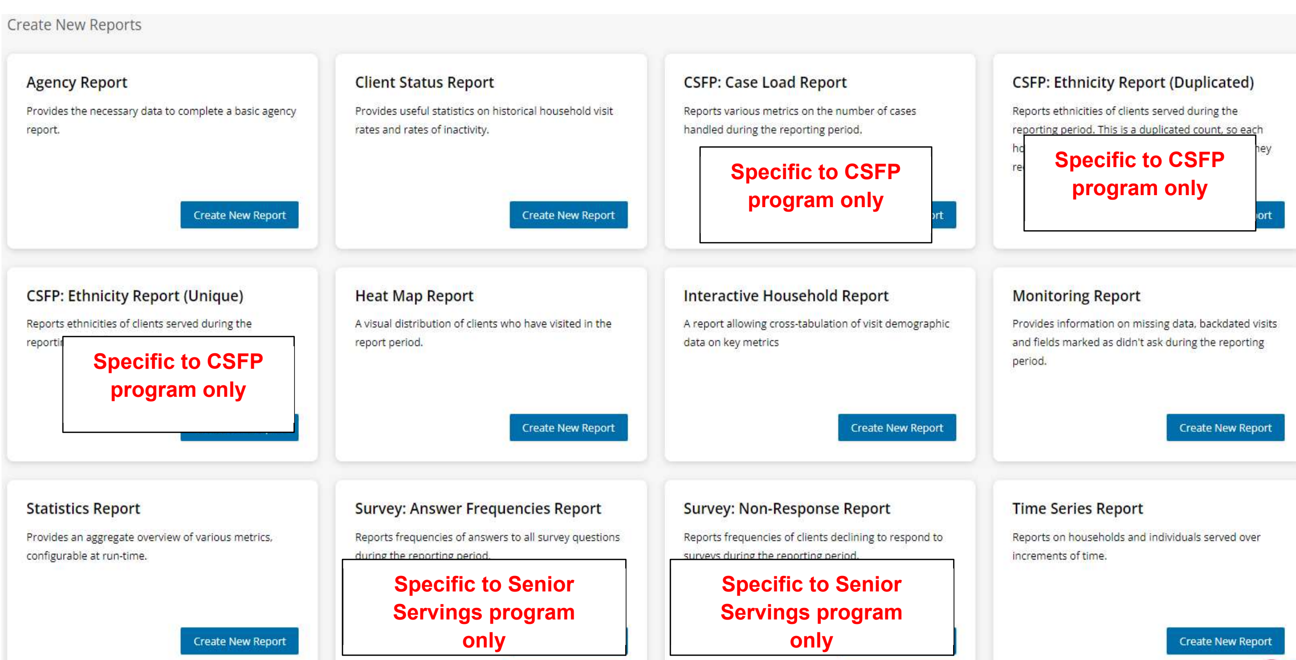
How to Run and Schedule a Report

On the left side dashboard, you will see a section for Reports. If you click, you will have three options:



- **New Report:** Opens the Report Dashboard to create a report
- **Report Inbox:** All reports you have ran live here
- **Report Templates:** Save report settings to quickly run reports commonly used
- **Recurring Reports:** Index of all scheduled reports

To create a new report, please click "New Report." This will open your dashboard of report options:



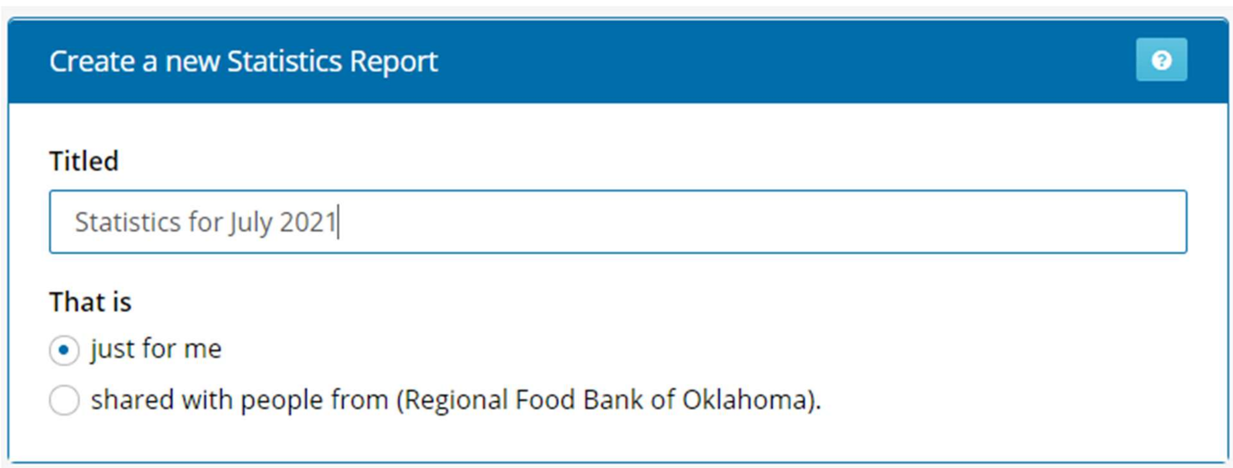
Depending on what programs your agency offers, you may have different reports than the image on the first page. Each report option has a basic summary of what the report is designed for.

A few useful examples:

- *The **statistics** report will allow you to run information on **any** question asked during intake*
- *The **time series** report looks at age groups served over a period, or new versus existing clients*
- *The **heat map** report is a visual representation of the community or communities you serve*

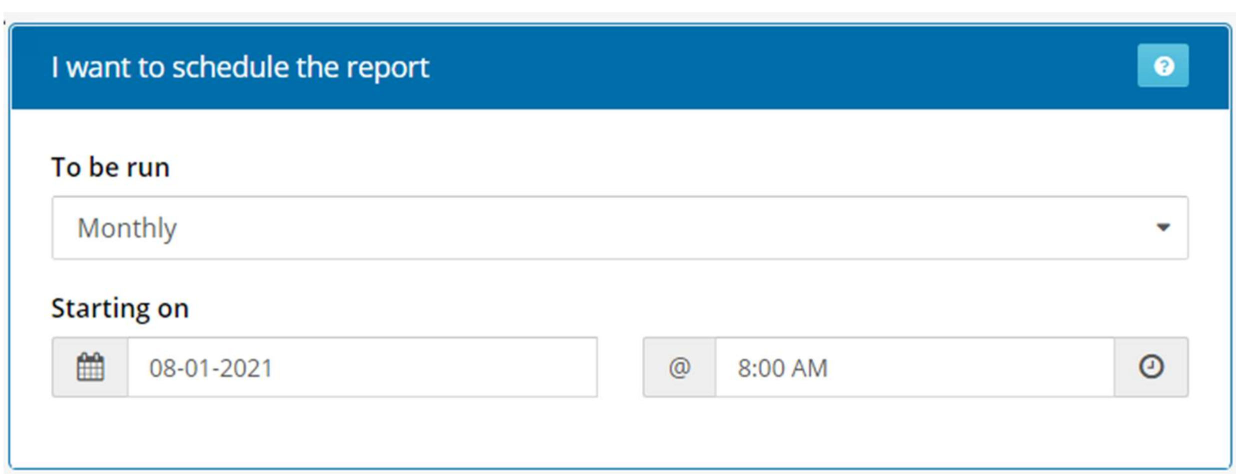
When you are ready, click "New Report" to begin running that report. **Regardless which report base you choose, several of the boxes in this next page will remain the same.**

First, the report will ask you to name your report. This is because Link2Feed keeps a record of the reports you run in the "Report Inbox" so this will help you distinguish between them.



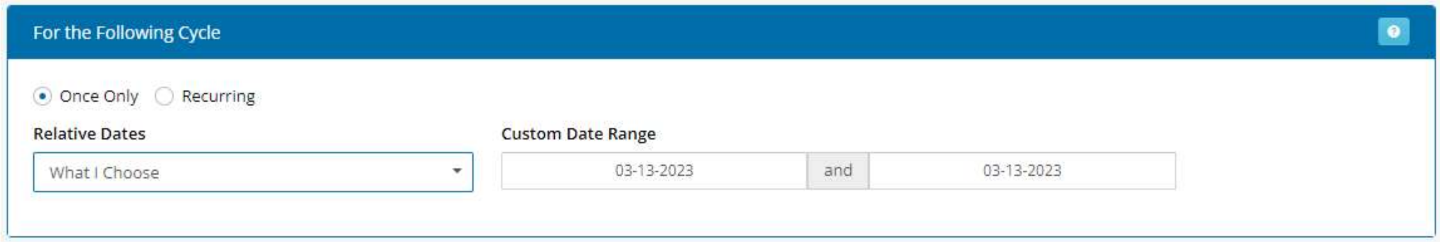
The next box, scheduling the report, is **optional**. **If you do not want to schedule this report to reoccur, leave this box blank.**

You only need to complete it if this is a report you would like to schedule to reoccur. For example, if this is a report you would run monthly, you can schedule it to run for you automatically. Automatic reports will be run for you based on the schedule you select, and Link2Feed will send you an email when your report is ready for you in the system.



In the dropdown, you can choose the frequency you need the report to be ran. Then, you can choose the start date and the time you would like the report to be run at.

The next option is the date range for which you would like to run the report. It defaults to “What I Choose” which allows you to set a specific date range.

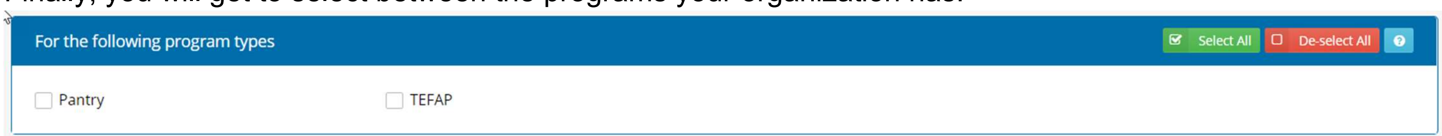


If you click the dropdown, there are also default options available, such as “Last Month” or “Last Year.” If you choose one of these options, you **do not** need to fill out the date options to the right.

If you are scheduling a report, be sure to click a relative date range, such as “Last Month,” otherwise the report will continue to run for the specific date range you have entered, such as “July 1, 2021 – Juy 31, 2021.”

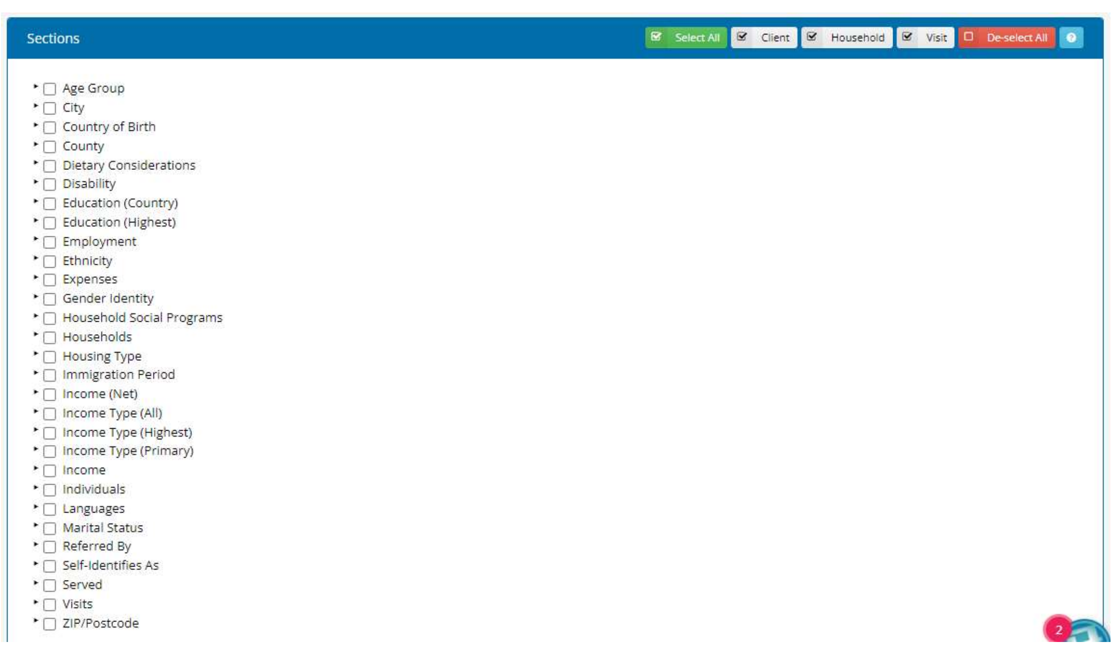
The next box is going to allow you to choose if you would like to run the report at an organization level, or by county or city:

Finally, you will get to select between the programs your organization has:



Depending on what your organization offers, you may have more or fewer options in this box. If you would like to see overall data regardless of program, be sure to check all available options.

Everything after this final box is unique to the report base you have selected. In this example, it is the statistics report, as it has the most options to walk through:



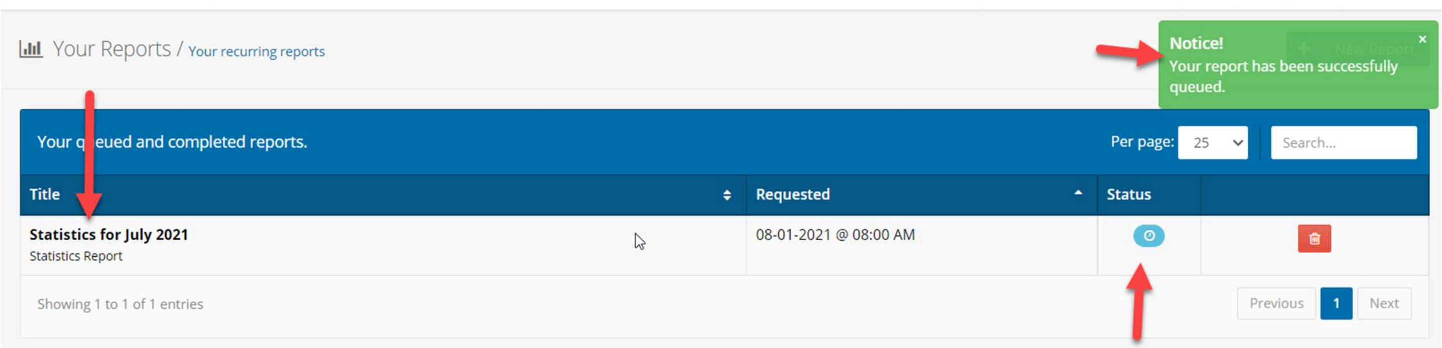
Reporting Vocabulary:

- **Unique** – This counts the person. For example, if you saw Mrs. Smith 12 times in the last year, she is still only a single person, and would be counted one time.
- **Duplicated** – This counts the visit. For example, if you saw Mrs. Smith 12 times in the last year, it would count the 12 visits even though Mrs. Smith is only one person.
- **Neighbor** – The Head of Household, or whomever filled out the paperwork/main profile
- **Partner** - Whomever has a significant relationship to the Neighbor (fiancé, partner, wife, etc)
- **Individual** – Counts every person, regardless if they are HoH or household member
- **Household** – Looks at the household on file as a whole

Once you have made your selections, scroll to the bottom and click Create Report.

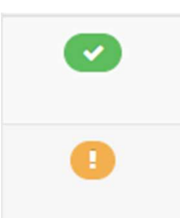
Viewing a Report

Clicking create will automatically take you to your Report Inbox, where the report you requested will be generating. You may receive a green pop-up in the upper right letting you know your report is successfully queued.



If you have run other reports, they will list below the one you have requested, in order by the date they were requested.

The **Blue** circle under status (above) means that the report is generating.

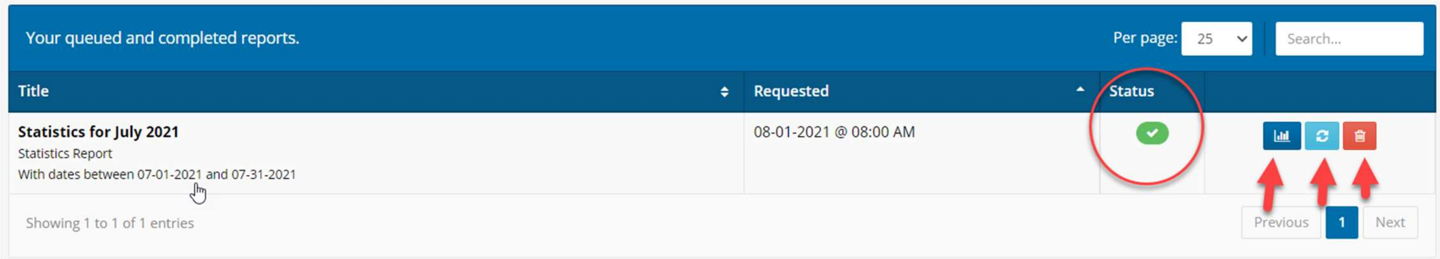


A **green** checkmark means that the report ran successfully.

An **orange** exclamation point means there was no information for the report you requested.

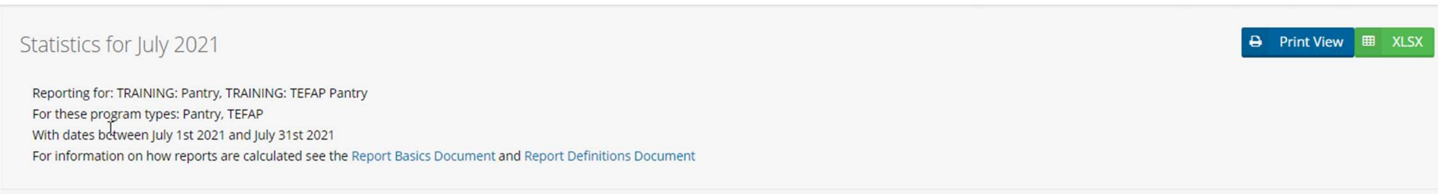
Depending on the information you have requested, reports are nearly instantaneous. You may refresh your browser a few times to see if the status on your report has changed.

When the report is ready, you will notice the name of the report is now blue, and you have new options:



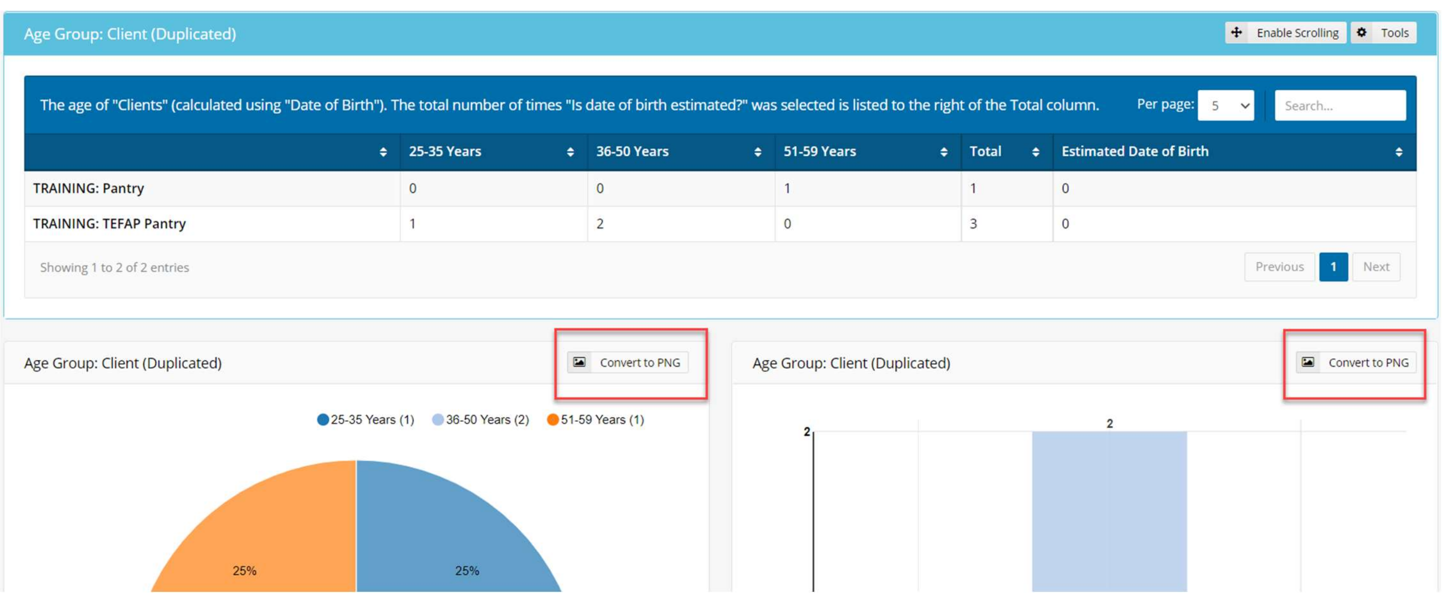
The first blue button, that looks like a graph, will allow you to view the report results. The middle light-blue button allows you to refresh and re-run the report; and the red trash can allows you to delete the report.

When you click in to view the report, there will be a limited summary at the upper-left about the information you requested. Options to print or export the results in to Excel are at the upper right.



Depending on the report you selected to run, your report results may look differently than the ones in the images here. Again, this example is for the statistics report.

For this report, the information is offered in one of two ways: a table, and pre-built graphs. Both options are available for each segment of data requested. For example, both the table and the charts in the image are representative of “Age Group: Neighbor (Duplicated)” which we can see at the upper left.



To download a graph, click the “Convert to PNG” button in the upper right of the respective graph. This will change the button to read “Download.” Once you download the image to your computer, you can share it via email, imbed it into documents, etc.