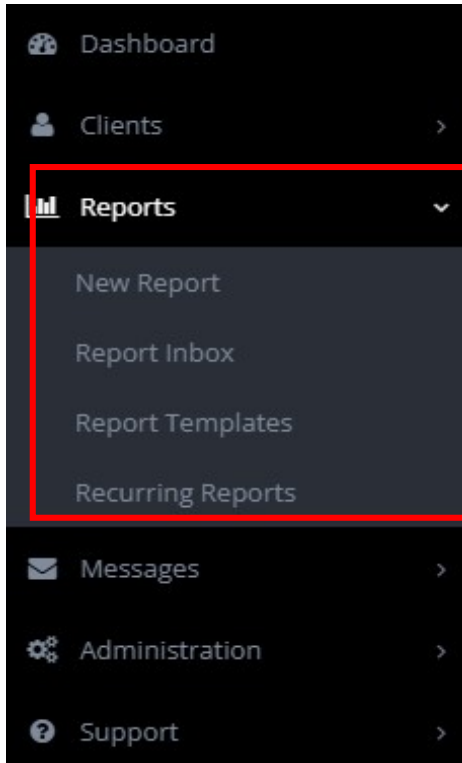


Link2Feed Reports

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:

Create New Reports

Agency Report Provides the necessary data to complete a basic agency report. Create New Report	Client Status Report Provides useful statistics on historical household visit rates and rates of inactivity. Create New Report	CSFP: Case Load Report Reports various metrics on the number of cases handled during the reporting period. Specific to CSFP program only Create New Report	CSFP: Ethnicity Report (Duplicated) Reports ethnicities of clients served during the reporting period. This is a duplicated count, so each household is counted multiple times. Specific to CSFP program only Create New Report
CSFP: Ethnicity Report (Unique) Reports ethnicities of clients served during the reporting period. Specific to CSFP program only Create New Report	Heat Map Report A visual distribution of clients who have visited in the report period. Create New Report	Interactive Household Report A report allowing cross-tabulation of visit demographic data on key metrics Create New Report	Monitoring Report Provides information on missing data, backdated visits and fields marked as didn't ask during the reporting period. Create New Report
Statistics Report Provides an aggregate overview of various metrics, configurable at run-time. Create New Report	Survey: Answer Frequencies Report Reports frequencies of answers to all survey questions during the reporting period. Specific to Senior Servings program only Create New Report	Survey: Non-Response Report Reports frequencies of clients declining to respond to surveys during the reporting period. Specific to Senior Servings program only Create New Report	Time Series Report Reports on households and individuals served over increments of time. Create New Report

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.

Create a new Statistics Report

Titled

Statistics for July 2021

That is

just for me

shared with people from (Regional Food Bank of Oklahoma).

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.

I want to schedule the report

To be run

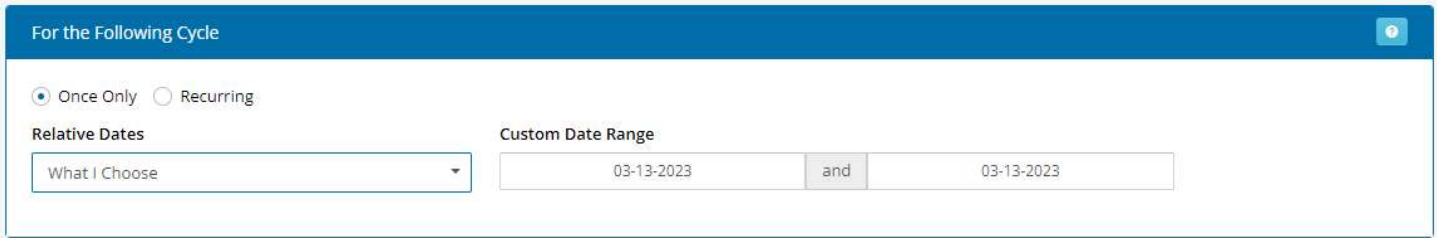
Monthly

Starting on

08-01-2021 @ 8:00 AM

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 – July 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:

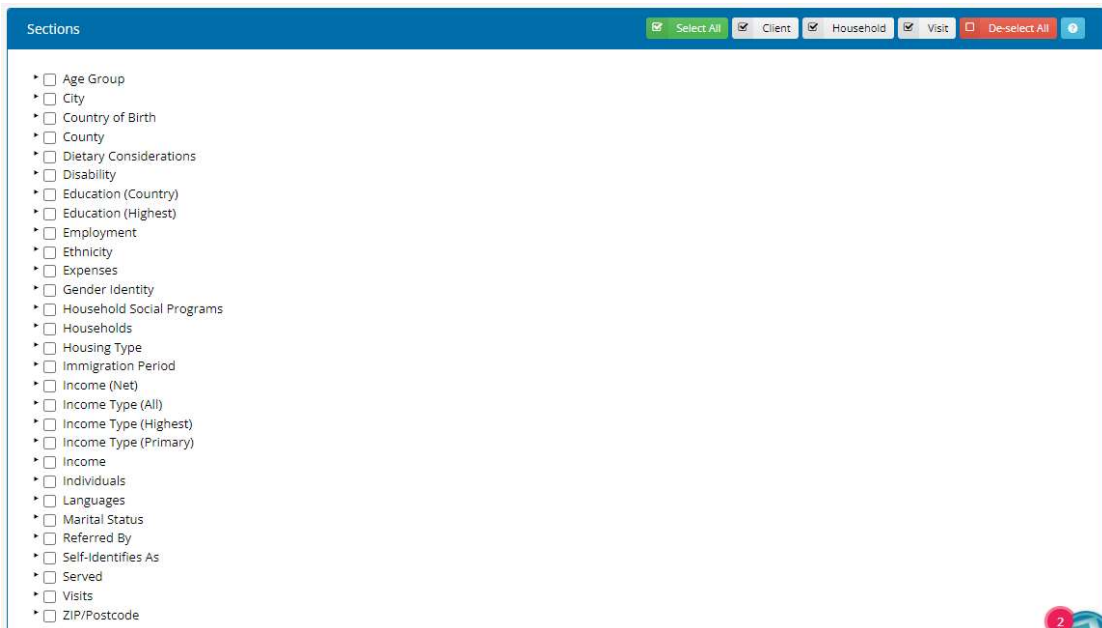


Finally, you will get to select between the programs your organization has:



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.

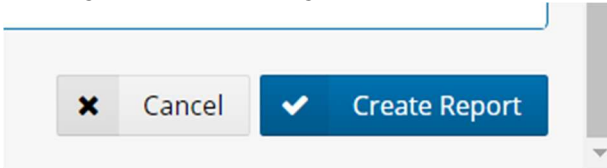
Everything after this final box is unique to the report base you have selected. In this example, it is the statistics report, as it has the most options to walk through:



Reporting Vocabulary:

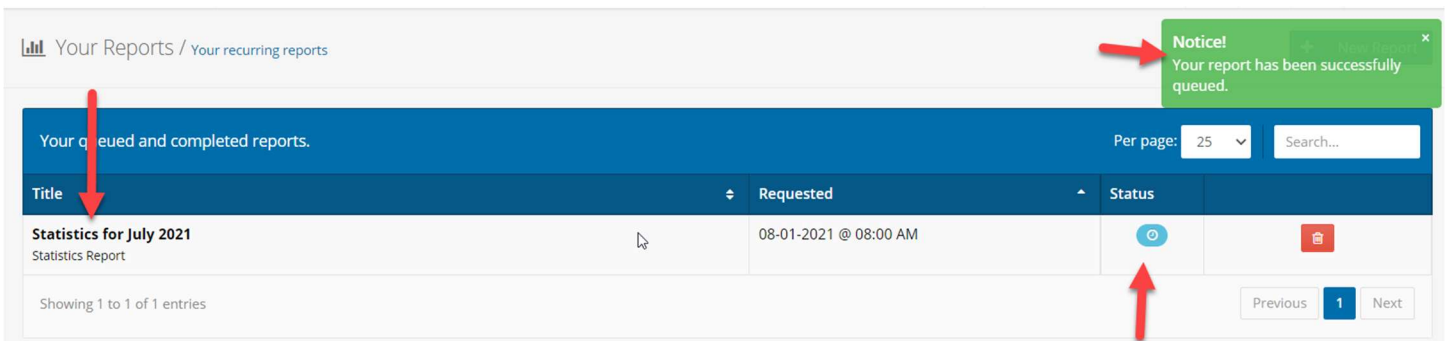
- **Unique** – This counts the person. For example, if you saw Mrs. Smith 12 times in the last year, she is still only a single person, and would be counted one time.
- **Duplicated** – This counts the visit. For example, if you saw Mrs. Smith 12 times in the last year, it would count the 12 visits even 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**.



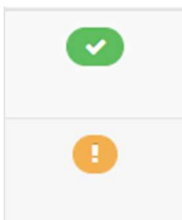
Viewing a Report

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.

A screenshot of the 'Your Reports' page. At the top right, a green notification box says 'Notice! Your report has been successfully queued.' Below this, a table lists reports. The first row is 'Statistics for July 2021 Statistics Report', requested on '08-01-2021 @ 08:00 AM'. The status column shows a blue circle with a refresh icon. A red arrow points to this icon. Another red arrow points to the notification box. The table has columns for 'Title', 'Requested', and 'Status'. Below the table, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' navigation buttons.

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:

Your queued and completed reports.

Per page: 25 Search...

Title	Requested	Status
Statistics for July 2021 Statistics Report With dates between 07-01-2021 and 07-31-2021	08-01-2021 @ 08:00 AM	   

Showing 1 to 1 of 1 entries

Previous 1 Next

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.

Statistics for July 2021

Reporting for: TRAINING: Pantry, TRAINING: TEFAP Pantry
 For these program types: Pantry, TEFAP
 With dates between July 1st 2021 and July 31st 2021
 For information on how reports are calculated see the [Report Basics Document](#) and [Report Definitions Document](#)

Print View XLSX

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.

Age Group: Client (Duplicated)

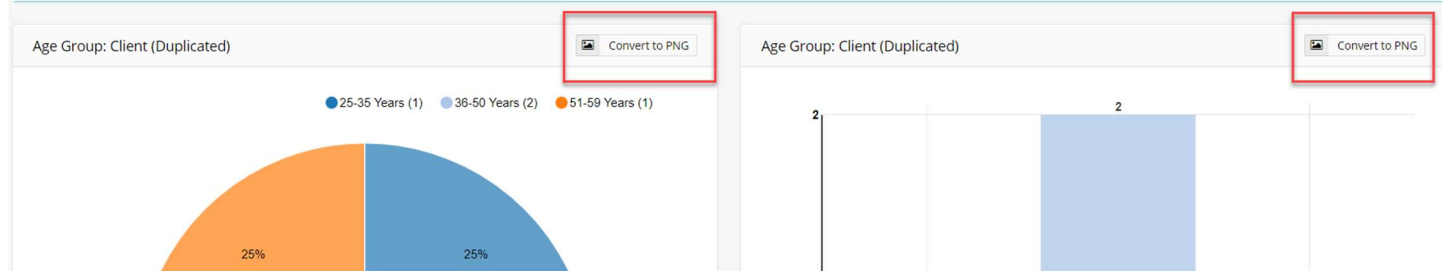
Enable Scrolling Tools

The age of "Clients" (calculated using "Date of Birth"). The total number of times "Is date of birth estimated?" was selected is listed to the right of the Total column. Per page: 5 Search...

	25-35 Years	36-50 Years	51-59 Years	Total	Estimated Date of Birth
TRAINING: Pantry	0	0	1	1	0
TRAINING: TEFAP Pantry	1	2	0	3	0

Showing 1 to 2 of 2 entries

Previous 1 Next



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.