



Training Manual

LINK Reporting

Training Activities for the LINK Client Recording System

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Activity: Produce a Project Summary

When to Use This Report Option

When you need to answer the question **HOW MANY ACTIONS AND OUTCOMES?**

When you need **anonymous** statistics counting all actions and outcomes carried out by your organisation, broken down by type of action and client gender

Password Required

Project Manager

Prior Knowledge

'How to Use LINK' training course already completed

To Produce a Project Summary

- Click **Reports** on the LINK menu
- Click **Project Summary**
- Choose **All Actions** from the **Include** dropdown list
- Enter the relevant **Start Date** and **End Date**
- Click **Run Report**
- To print, click on the **File** menu and choose **Print**

PRACTICE EXERCISE: Copy statistics into Microsoft Word or Excel

Start up **Word** or **Excel** (preferably the one you are most familiar with).

Switch to **Dublin Link**

Run the **Project Summary**

Highlight Section 1, right click on the highlighted area and choose **Copy**

Switch to Word/Excel

Go to the **Edit** menu and choose **Paste**

Can you edit the data once you have pasted it?

Activity: Produce an Action Listing

When to Use This Report Option

When you need to answer the question **WHO HAS DONE WHAT WITH WHICH CLIENTS?**

When you need a report listing each action / outcome done by your staff on behalf of / with clients **including the date, client name and staff name**

Password Required

Project Manager

Prior Knowledge

'How to Use LINK' training course already completed

To Produce an Action Listing

- Click **Reports** on the LINK menu
- Click **Action Listing**
- Choose **Project Clients** from the **Report On** dropdown list
- Click **Run Report**
- Choose **All Staff** or a particular staff member (that is, the name of the staff member who carried out the action) from the **Staff** dropdown list.
- Enter the relevant **Start Date** and **End Date**
- Choose the order in which you would like the list sorted by selecting the relevant option from the **Order By** dropdown list.
- If you want to include all actions click **Select all actions/types**, otherwise select the relevant actions
- Click **Run Report**
- NOTE: Only the first 100 records found are displayed on screen. However, if you print out the report, all records will be shown.
- To print, click on the **File** menu and choose **Print**

Tips on Selecting Actions

To select actions of all types, click **Select all actions/types**.

To select all actions of one type, click the relevant **All** box.

To select more than one action within an action box, hold down the **Ctrl** key as you click on them.

To De-select a choice, hold down the **Ctrl** key and click.

PRACTICE EXERCISE: Print all actions done in a given time period

Run a report of all types of actions carried out by your staff in the last year.

How many records did you find? _____

If you were having a meeting to review the work done with a client, would this report be useful? How?

PRACTICE EXERCISE: Print a report containing only certain types of actions

Run a report of all assessments and referrals done in your organisation in the last three months.

Try the different options given on the **Sorted by** dropdown list. What is the best order to sort the report in?

PRACTICE EXERCISE: Print a report containing only certain actions

Run a report that includes all the following actions carried out over the past six months:

Care & Case Management

Interagency Care Plan Agreed

Needs Assessment

Education Assessment

Work/Training Assessment

Activity: Advanced Search

When to Use This Report Option	When you want to produce a list of clients WHO MEET CERTAIN CRITERIA e.g. of a certain age or gender
Password Required	Project Manager
Prior Knowledge	'How to Use LINK' training course already completed

To Do an Advanced Search

- Click **Advanced Search** on the LINK menu
- Choose one of the following:
 - o To search all of Dublin LINK, click **All clients**
 - o To refine your last search, click **Only clients in your Last Client List**
 - o To search for clients in your organisation, click **Current/Default Clients Only**
- Enter search criteria (e.g. gender)
- If you want to choose more than one criteria in a single box, hold down the **Ctrl** key and click each one - both should be highlighted in blue
- Click **find**

PRACTICE EXERCISE: Doing Advanced Searches

Find all the women at your organisation who are single with children.

Activity: Download Data

When to Use This Report Option

When you need to **ANALYSE DATA** in ways not possible with standard LINK reports, **PRODUCE CHARTS**, and **PRODUCE CUSTOMISED LISTINGS** for administrative purposes

Password Required

Project Manager

Prior Knowledge

'How to Use LINK' training course already completed

To Download Data to Microsoft Excel

- Click **Reports** on the LINK menu
- Click **Data Download Reports**
- Choose the name of your organisation from the **Active Clients** dropdown list
- Choose the relevant type of information that you want to download from the **Type of Information** dropdown list
- Enter the relevant **Start Date** and **End Date**
- Click **Run Report**
- A **File Download** box will appear.
- Click **Save**
- A **Save As** box will appear
- Give the file an appropriate name and click **Save** to save it to your computer
- NOTE: Remember that once information is out of LINK it is no longer protected by banking level security. You should treat the file as you would any confidential client information.
- The **Download Complete** box will appear - click **Close**
- If you are not going to use LINK again right away, log out
- Open the file that you have exported to Excel - it is now ready for use

PRACTICE EXERCISE: Data Downloads

Download all **Client Data** for your organisation recorded in the last month.

Then, download all **Actions and Outcomes** data recorded in the last month.

How many records were found in each case? _____

Is there any important information that is not being entered regularly by your staff?

To Filter Data in Microsoft Excel

When you have downloaded a file to Excel, you can quickly pull out one or another group of client records using *filters*.

- Click on any cell containing client or action data
- Go to the **Data** menu, choose **Filter**, then choose **AutoFilter** - an arrow pointing down will appear beside each column heading
OR
If you have Excel version 2007, go to the **Data** menu and choose **Filter**
- Click on an arrow and note that you now have a dropdown list with a number of options
- Choose an option to filter the list
- NOTE: The arrow turns blue to indicate that a filter is in place on this column. When you want to remove the filter on that column, choose **All**.
- If you want to remove all filters, go to the **Data** menu again, choose **Filter**, then choose **AutoFilter**
OR
If you have Excel version 2007, go to the **Data** menu and choose **Filter**

PRACTICE EXERCISE: Filtering Records #1

Open a **Client Data** report that you have downloaded to Excel.

Use filters to display all the female clients.

Then change the filter to display all the male clients. Then apply a second filter to display only those male clients who are on the homeless register.

Remove the filter from the **Homeless Register** column.

Remove the filter from the **Gender** column.

PRACTICE EXERCISE: Filtering Records #2

Open an **Action and Outcome** report that you have downloaded to Excel.

Use filters to display female clients only. Then apply a second filter to display only those female clients for whom a **Consent: written action** has been recorded.

Remove the filters from the **Gender** and **Action** columns.