

# How to Obtain Master List of Clients

## Screen #1

**CLICK: Analysis & Learning Center**

**Main Menu**

Manager Tools	Manage All ID Types	eSignatures	Update Reservations from Prior Services (Offline Service)
Service History Lookup	(To add NEW records, use the [button] from the list below, or use Quick Add) History Lookup		
REPORTS	Agency Stats Report	** NEW ** Analysis & Learning Center	Main Pantry Report Include Produce
HELP DESK	Help Desk & Knowledge Base (ask for Help and find Answers about PantryTrak) PT Help Desk		

11/13/2016 Sunday - Testing completed. All systems normal. Thanks, PT Systems Team

**Serve Families on 01/10/2017**

**Jump to day**

Select Event:  Choose a Date:

**Service Log**

**Current** | **By Year**

Event	Date	# Reservations	Check-in
Pantry	01/08/2017	31	Check-in
Pantry	01/01/2017	25	Check-in
Pantry	12/18/2016	33	Check-in
Pantry	12/11/2016	29	Check-in

**Service Snapshot**

	Visit Records	Served
Today	0	0
This Week	0	0
This Month	56	49
This Year	56	49

click chart below for NEW report

## Screen #2

**Analysis & Learning Center (ALC)**

Reports and Insights into your data  
A place where agencies ask questions and they are answered, learning is aggregated for all to share.  
Reports Added in the last 60 days are Highlighted in Yellow

Show  entries

Search:

Report Name	Description	Report Subtype	Input Fields	Date Added
<a href="#">Key Information for Services</a>	Shows a list of services between the time range entered, sensitive to the events you choose.	Special Event Lists	Event, Start Date, End Date	2016/06/10
<a href="#">Legally Disabled</a>	Shows the count of how many families have someone with a disability, and a sum of how many individuals are disabled in those families.	Creator Pittsburgh Community Food Bank	Event, Start Date, End Date	2015/10/14
<a href="#">List of Adoptions</a>	Generates a list of adoptions based on an event, and service status. Will show who the adoption is for, and their gift preferences.	Special Event Lists	event, status, start date, end date	2015/10/27
<a href="#">List of Adoptions with Mismatch between pieces, and the number of adoptions recorded</a>	Report will generate a list of adoptions and a count of how many adoptions have a mismatch between the number of pieces and the number of adoptions recorded.			
<a href="#">List of Families</a>	A comprehensive list of families and family-level data points served between the two dates by your agency.	Core List	Events, Service Status, Start Date, End Date	2015/09/10
<a href="#">List of Families with Proxy Information</a>	A list of families that have proxy information on file, along with your agency's note about them.	Special Event Lists	Event, Start Date, End Date, Service Event Status	2016/07/01
<a href="#">List of Families - With Foodshare Number</a>	A comprehensive list of families and family-level data points served between the two dates by your agency, with their food share number.	Food Share, Inc	Events, Service Status, Start Date, End Date	2015/09/10
<a href="#">List of Family Members</a>	A comprehensive list of family members and family member-level data points served between the two dates by your agency (ex. race, military, insurance etc).	Core List	Start Date, End Date, Events	2015/09/17
<a href="#">List of Services Provided to Families</a>	Shows a list of services provided to families between the time range entered.	Core List	Event, Start Date, End Date	2015/09/14

**CLICK: "List of Families with Foodshare Number"**

# Screen #3

Analysis & Learning Cent x Custom Report x

Secure | https://secure.pantrytrak.com/core/reportscustom/report\_events\_status\_start\_end1.php?report\_num=5643721d77996

HOME Reload Page Run This Report Again

### List of Families- With Foodshare Number

A comprehensive list of families and family-level data points served between the two dates by your agency, with their food share number.

Start Date > 7/1/2016

End Date > 01/10/2017

Choose Event(s) >  Pantry  
Choose Status(es) >  Reserved  Served  No Show  Cancelled by Client  Cancelled internal  Duplicate void

Output Method -  ON SCREEN  CSV Download

Generate Report

DESCRIPTION - A comprehensive list of families and family-level data points served between the two dates by your agency. This report is affectionately referred to as the Kitchen Sink report since it has every field that we possibly considered of interest.

ORIGIN OF THIS REPORT - Question from Pamela C. with Foodshare to help agencies see if they had recorded a foodshare id number for families or not. An agency's data is their data. This fulfills the need to export the full family-level information.

HOME Reload Page Run This Report Again

Page generated in 0.00197 seconds

# Screen #4

Analysis & Learning Cent x Custom Report x

Secure | https://secure.pantrytrak.com/core/reportscustom/report\_events\_status\_start\_end1.php?report\_num=5643721d77996

HOME Reload Page Run This Report Again

### List of Families- With Foodshare Number

A comprehensive list of families and family-level data points served between the two dates by your agency, with their food share number.

Start Date > 7/1/2016

End Date > 01/10/2017

Choose Event(s) >  Pantry  
Choose Status(es) >  Reserved  Served  No Show  Cancelled by Client  Cancelled internal  Duplicate void

Output Method -  ON SCREEN  CSV Download

Generate Report

DESCRIPTION - A comprehensive list of families and family-level data points served between the two dates by your agency. This report is affectionately referred to as the Kitchen Sink report since it has every field that we possibly considered of interest.

ORIGIN OF THIS REPORT - Question from Pamela C. with Foodshare to help agencies see if they had recorded a foodshare id number for families or not. An agency's data is their data. This fulfills the need to export the full family-level information.

HOME Reload Page Run This Report Again

Page generated in 0.00197 seconds

CLICK

export\_data (63).csv

Show all

# Screen #5

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J
1	services_p	active_fam	alt_id_valu	alt_id_nam	family_id	family_nun	primary_m	HOH_first	HOH_midc	HOH_last_c
2	25	1	85d2	FoodShare	628782	0	2012599			
3	24	1	16d2	FoodShare	628681	0	2012368			
4	24	1	54d2	FoodShare	628754	0	2012530			
5	24	1	29d2	FoodShare	629000	0	2013258			
6	23	1	50d2	FoodShare	628724	0	2012463			
7	22	1	3d2	FoodShare	628839	0	2012765			
8	21	1	99d2	FoodShare	628568	0	2012102			
9	21	1	48d2	FoodShare	628706	0	2012422			
10	21	2			890234	0	2846103			
11	21	1			893636	0	2857281			
12	20	1	100d2	FoodShare	628575	0	2012113			
13	20	1	10d2	FoodShare	628653	0	2012316			
14	20	1			893626	0	2857245			
15	20	2			908497	0	2904857			
16	19	1	101d2	FoodShare	628581	0	2012127		n	
17	19	1	8d2	FoodShare	628660	0	2012326			
18	19	1	51d2	FoodShare	628726	0	2012467			
19	16	1	1d2	FoodShare	628832	0	2012747			
20	16	1	35d2	FoodShare	628906	0	2012943			
21	15	3	45q1	FoodShare	608523	0	1947028			
22	14	1	143d2	FoodShare	628680	0	2012367			
23	13	4	185h3	FoodShare	628586	0	2012140			

This is now on your excel sheet. You can now alphabetiz, rearrange and/or delete the columns you want and/or don't want on your hard copy before printing. FYI, the "active\_family" is the number of people in their household.