

Report Tracker

Quick Start Guide

The screenshot displays the 'Report Tracker' application interface for a project named 'Northern Strike 23'. The interface is divided into several sections:

- Left Sidebar:** Contains a menu for 'All projects', a search bar for 'Find projects', a '+ New project' button, and a selected project 'Northern Strike 23' with '8 work items'.
- Header:** Features a banner image of a snowy mountain range and the project title 'Northern Strike 23'.
- Report Status:** Shows four progress indicators for different report types: 'Assessment Plan - ...', 'Execution Report ...', 'Preliminary Result...', and 'Final Report - 31 ...'. Each indicator shows a 0% completion rate and a set of colored bars representing counts (e.g., 5, 0, 0, 0 for Assessment Plan).
- Tracking Table:** A table with columns for 'Work item', 'Report', 'Status', 'Updated', 'Team Member', 'Target', and 'Phase'. It lists various tasks such as 'Writing', 'Review by Div Chiefs', and 'Review by Tech Editor', each associated with a specific report type and phase.
- Bottom Left:** Includes a 'Customize' button.

Work item	Report	Status	Updated	Team Member	Target	Phase
<input type="checkbox"/> Writing	Assessment Plan	New	15 Mar 2023	COJOCAR, W.	03 Mar 2023	Phase1
<input type="checkbox"/> Review by Div Chiefs	Assessment Plan	New	15 Mar 2023	MAJERCHIN, L.	31 Mar 2023	Phase2
<input type="checkbox"/> Review by Tech Editor	Assessment Plan	New		STEVENSON, L.	01 Apr 2023	Phase3
<input type="checkbox"/> Review by Tech Advisor	Assessment Plan	New		BAXTER, S.	08 Apr 2023	Phase4
<input type="checkbox"/> Review/Sign by Director	Assessment Plan	New		ABEL, B.	15 Apr 2023	Phase5
<input type="checkbox"/> Writing	Execution Report	New			02 Jun 2023	Phase2
<input type="checkbox"/> Writing	Preliminary Results Report	New			20 Jul 2023	Phase1
<input type="checkbox"/> Writing	Final Report	New		LALANDE, D.	31 Aug 2023	Phase1

Overview

The Report Tracker application was created from the Milestones app for Microsoft Teams. It is customized for use with reports typical to JCER. These include:

- Assessment Plans
- Observation Plans
- Execution Reports
- Quick Look Addendums
- Preliminary Results Reports
- Observation Reports
- Final Reports

Purpose

- Ease of setting up projects and work items without spreadsheets
- Assign work items to employees
- Classify work items by reports
- Configure work item categories, priorities, and status options

Open the Report Tracker

To open the app:

1. Sign-in to Teams.
2. Select the JCER Team.
3. Select the General channel.
4. Select the Report Tracker tab.
5. Select Allow if the app asks for permission to use the connectors.
6. You can learn more about extending this app's capabilities on the splash screen. Select Got it to close the screen, and go to the app. To hide this message, select Don't show this again.

Main Interface

The Joint Forces exercises reports and plans are referred to in the Report Tracker as projects. The Report Tracker automates the tracking of reports, work items, and dates. The main interface is shown below.

The screenshot shows the main interface of the Report Tracker for a project named "Northern Strike 23". The interface is divided into several sections:

- Left Sidebar:** Contains a hamburger menu icon, the text "All projects", a settings gear icon, a search box labeled "Find projects", a "+ New project" button with up/down arrows, and a highlighted project card for "Northern Strike 23" with "8 work items" and a pencil edit icon.
- Header:** Features a banner image of a snowy mountain range with the title "Northern Strike 23".
- Report Status:** A section with a dropdown arrow, showing four progress indicators for "Assessment Plan", "Execution Report", "Preliminary Result", and "Final Report - 31 ...". Each indicator shows a 0% completion rate and a set of colored bars representing counts (e.g., 5, 0, 0, 0 for Assessment Plan).
- Tracking:** A table with a "+ New work item" button and search, filter, and delete icons. The table has columns for Work item, Report, Status, Updated, Team Member, Target, and Phase.

Work item	Report	Status	Updated	Team Member	Target	Phase
<input type="checkbox"/> Writing	Assessment Plan	New	15 Mar 2023	COJOCAR, W.	03 Mar 2023	Phase1
<input type="checkbox"/> Review by Div Chiefs	Assessment Plan	New	15 Mar 2023	MAJERCHIN, L.	31 Mar 2023	Phase2
<input type="checkbox"/> Review by Tech Editor	Assessment Plan	New		STEVENSON, L.	01 Apr 2023	Phase3
<input type="checkbox"/> Review by Tech Advisor	Assessment Plan	New		BAXTER, S.	08 Apr 2023	Phase4
<input type="checkbox"/> Review/Sign by Director	Assessment Plan	New		ABEL, B.	15 Apr 2023	Phase5
<input type="checkbox"/> Writing	Execution Report	New			02 Jun 2023	Phase2
<input type="checkbox"/> Writing	Preliminary Results Report	New			20 Jul 2023	Phase1
<input type="checkbox"/> Writing	Final Report	New		LALANDE, D.	31 Aug 2023	Phase1

All projects Menu

Three Horizontal Bars (hamburger): The hamburger hides/reveals the left column menu.

Gear: The settings gear takes you to the Global Settings page.

Find projects: The Find projects search box searches for projects to display in the list on the left pane inside the app.

New project: Creates a new project.

Up/Down Arrows: The arrows to the right of New project allow you to sort the projects list.

Pencil (edit): The pencil next to each project allows you to customize the list of reports associated with that project.

This image is a close-up of the "All projects" menu from the screenshot above. It shows the hamburger menu icon, the text "All projects", a settings gear icon, a search box labeled "Find projects", a "+ New project" button with up/down arrows, and a highlighted project card for "Northern Strike 23" with "8 work items" and a pencil edit icon.

Header

The project name appears in the upper left corner of the header. The background is set using the Header Image button.



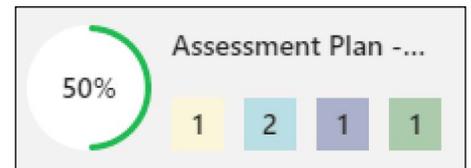
Header Image button: Allows you to change the header. Images or theme colors may be used. Custom images require uploading and should be in a panoramic orientation.

Report Status

Each report in a project is shown with an overall completion status. The four squares represent the stages or Status of each work item.



In the above image, the Assessment Plan has five work items all of which are in New Status. The overall completion is therefore 0%. Percent completion is calculated using statuses. Quantities shown in the Status table below result in the image at right.



Status	Percent of Completion Basis	% / Qty	Equals	Total
New	0% x Qty of New items (1)	0/5	0%	52% rounded to 10% = 50%
In Progress	40% x Qty of items In Progress (2)	80/5	16%	
Needs Sig	80% x Qty of items which Need Signature (1)	80/5	16%	
Done	100% x Qty of signed (Done) items (1)	100/5	20%	

App settings - provides access for managers to change app settings, such as update project category, priority, and status.

Sort projects - sorts the list of projects in ascending, or descending order based on project start date.

View team status of work items by owner - color coded counts display the number of work items by milestone. Select the drop down to toggle to user summary view, showing work items by user.

Projects list - shows all projects, or the results of the search term entered in the find projects search box. Overdue work item count is displayed if the project has any overdue work items.

Project work items - create, read, update, and delete work items associated with the project.

Project properties - update project properties, such as modifying or deleting projects or updating Report Tracker and team members associated with the project.

How do I...?

Create a new project

1. Open the Report Tracker.
2. Select New Project from the left pane.
3. Enter the Name of the exercise.
4. Enter work items as required. To add additional work items, select New Work Item.
5. Select Next.
6. Add team members to the project.
7. Select Create to create the project.

Add a Theme

Once the project is created, select the image button to select an existing image, choose a color, or upload a custom image as the project theme.

Add Work Items

1. Open the Report Tracker.
2. Select a project from the left pane.
3. Select New work item.
4. Add the work item details: Name, Description, values for Assigned to, Milestone, Status, Category, Priority, and Target date.
5. Select Create.

Edit a Project

1. Open the Report Tracker.
2. Select a project from the left pane.
3. Select the Click to Customize button.
4. Update project details.
5. Select Save.

Edit Options and Colors

You can change the options and color coding for Priority, Status, and Category.

1. Open the Report Tracker.
2. Select Settings ().
3. In the Global Settings area, select the color on the option to change.
 - To Rename:
Select the name of the category, priority, or status that you wish to change, and enter a new name.
 - To Add:
Select Add next to the category, priority, or status. And then, select the color, and enter the name.
 - To Delete:
 - ◆ Select the field.
 - ◆ Select Delete ().
 - ◆ Check "I understand."
 - ◆ Select Delete to permanently delete the selection.
4. When finished, select Save.

Delete a Project

NOTE: This is a permanent action.

1. Open the Report Tracker.
2. Select Click to Customize button.
3. Select the project that to delete from the list of projects in the left pane.
4. Select Delete Project.
5. Check "I understand."
6. Select Delete to permanently delete the project.

For more information on the Report Tracker, or to report a bug, contact Lisa Stevenson at l Stevenson@mail.mil.