Section I. How to Add Prior Year Assistance
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The 2020 Tracking Tool (TT) has several new features that will empower Directors to administer their own local of information without having to rely upon IT. This includes the ability to add/edit/delete users and modify Contribution amounts for any week during the campaign.

It is important that Directors review their users to ensure users with the level of ‘Coordinator’ are indeed the ones, in addition to the ‘Director’, entrusted with entering weekly contributions.

This document describes how to use these features, and addresses the commonly asked question, how to add the prior year’s assistance for each Command.

As introduced in the 2018 TT, there is a help reference built into the product. Among other things, it contains tutorial videos to help familiarize users with the tool.
Section I. How to Add Prior Year Assistance

1. Click on the Commands icon
2. Identify the Command to add assistance to and click ‘Edit’
3. Enter a value in the last field ‘Previous Year NMCRS Assistance’, then click ‘Save’. This number defaults to zero and must be manually input. The number represents the total financial assistance provided for this Command for the prior year (that would be 2018 for the 2020 ADFD).
Section II. How to Add/Edit/Delete Users

From the Home screen click on the ‘Users’ menu. To edit or delete a user, click on ‘Edit/Delete Users’
These are all the users currently assigned to this FSO, in this case Millington, TN. Note that the ‘Role’ column specifies the security level assigned to the user. To change a user, click the ‘Edit’ button.
In the edit screen ‘FriendlyName’ is the name that will appear when a user logs into TT.
The Office dropdown field contains all FSOs and the user role dropdown contains the security level the user will be assigned.
Directors can perform nearly any operation in the TT. Coordinators can add weekly contributions, but cannot add/edit/delete UICs/RUCs or users nor can they add/edit/delete Commands or perform Port changes.
In the event a user requires a password change, the Director should check the RequestPwdReset and enter the password twice.

Remember to click ‘Save’!
Adding a new user is a two-step process. First enter the email and password and click ‘Register’. In the next screen select the Office and User Role. Adding a new user does not require you to check RequestPwdReset and enter the password again.
Section III. How to Add a Command

From the home page click on the ‘Commands’ icon

Click ‘Add a Command for 20xx’.
Click in the field Command Unit Name UIC/RUC and start typing the UIC/RUC. Each character that is input will attempt to identify the one you are looking for.
Now click the ‘UIC/RUC’ field. The UIC/RUC and ‘Command Friendly Name’ fields will both display values.
Change the Friendly name if you wish and select either Society (typical) or Regional category. Enter as many of the fields as you can especially the last 4 ‘Current Year # Assigned’ ‘Prior year NMCRS Assistance’. Note that ‘Prior Year # Assigned’ and ‘Prior Year Contributions’ are read-only and cannot be edited.
Section IV. How to add Weekly Contributions

From the home screen, click or tap on the ‘Contributions’ icon.

Identify the Command you wish and click the ‘add’ button
Enter the values and click ‘Save’.

Add New

Add a New Contribution for BRHEALTHCLINIC KINGS BAY GA

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transmittal</td>
<td>2</td>
</tr>
<tr>
<td>Week #</td>
<td>1</td>
</tr>
<tr>
<td># of Contacts This Transmittal</td>
<td>0</td>
</tr>
<tr>
<td># of Donors This Transmittal</td>
<td>0</td>
</tr>
<tr>
<td>Amount of Cash/Check Contributions This Transmittal</td>
<td>0.00</td>
</tr>
<tr>
<td>Amount of Allotment Contributions This Transmittal</td>
<td>0.00</td>
</tr>
<tr>
<td>Amount of Credit Card Contributions This Transmittal</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Contributions This Transmittal</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Check Here If This Is Your Final Contribution

Save  Cancel

Save  Cancel
Section V. Reports

A. CNIC Reports

Custom reports for all CNIC regions throughout the world, released in beta in 2018 are now fully integrated into the TT. Click on a region on the world map to view a familiar UIC report for all Commands within that region.
Section IV. Quick Reference Cards
Welcome Traci Schuck Coordinator, from San Diego Region. You are in the Home panel. Click on this red bar to toggle screen size.

The home panel has icons that fast-track you to where you need to get quickly.

Commands Tab
- Add personnel assigned #
- Add Activity Coordinator info

Welcome Traci Schuck Coordinator from San Diego Region. You are in the Commands panel. Click on this red bar to toggle screen size.

The Commands panel allows you to add, remove, or change your Commands. Select Add Command for Year 2018 to add new commands to your report. A separate panel will open where you will add command information.

Commands for San Diego Region for 2018

1. Use filter sort for name or UIC to find command
2. Select “Edit” to add personnel assigned & Activity Coordinator POC
Enter weekly data from Activity Coordinators in Contributions
Welcome Tripe Schuck Coordinator, from San Diego Region. You are in the Home panel. Click on this red bar to toggle screen size.

The home panel has icons that fast-trace you to where you need to get quickly.

- **Executive Summary** – all subareas
- **UIC/RUC Query** – generate a report by whatever UIC/RUCs you choose.
  - Established reports by reporting subarea.
  - Able to build regional lists for commanders.
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