Comprehensive Project Report

Reference Guide

Document Details

Document #: OPSX00001_260122

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System Requirements

- For system and browser requirements, click here: Ops Execution Knowledge Base/System Requirements
- Ops Execution supports all new browser versions within 7 days of release and maintains support for the last 2 releases of each browser. ⛔ **Internet Explorer is NOT supported.**

Overview

This guide describes all of the features available in the Comprehensive Project Report, which consolidates these 5 Project Reports into one report and allows the creator to select either creator or recipient visbility.

- Project Completion Recap - For Locations
- Project Completion Recap - For Users
- Project Completion Recap With Failures - For Locations
- Project Completion Recap With Failures - For Users
- Advanced Project Completion Recap - For Locations

Users

Admins/Owners using Ops Execution in a web browser

Download the latest version of this document here:
https://links.crunchtime.com/CompProjectReport
… or scan the QR code to the left.

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Ops Execution

Benefits: The new robust configuration gives much more flexibility to tailor reporting to your needs with these new features:

New Functionality	Benefit
Enables report distribution by role/recipient	Share with the right people and restrict data access/visiblity by role.
Hand select which reports to include	Ensure that only the reports you want to see are included without having to rely solely on filtering capabilities.
Filtering by: • Companywide or Brandwide customers • Franchisee or Team (depending on the previous selection, Team only applies to location, and for user, it is based on the assignee) • Location vs user-based tasks • Roles (only applicable to assigned users) • Due Date (explicit Due Date) • Project • Project Frequency • Form Category (only applicable to form projects) • Location Attributes (only applicable to Location-based projects) • Date grouping selection (Daily, Weekly, Monthly, Yearly, if they select Project Frequency we default to that in this selector)	Customize the scope of your report and the recipient so the data exported is valuable, relevant and timely.
Report email includes configuration summary	Allows recipient to see the parameters for creating the report or if the report is empty based on the criteria selected.

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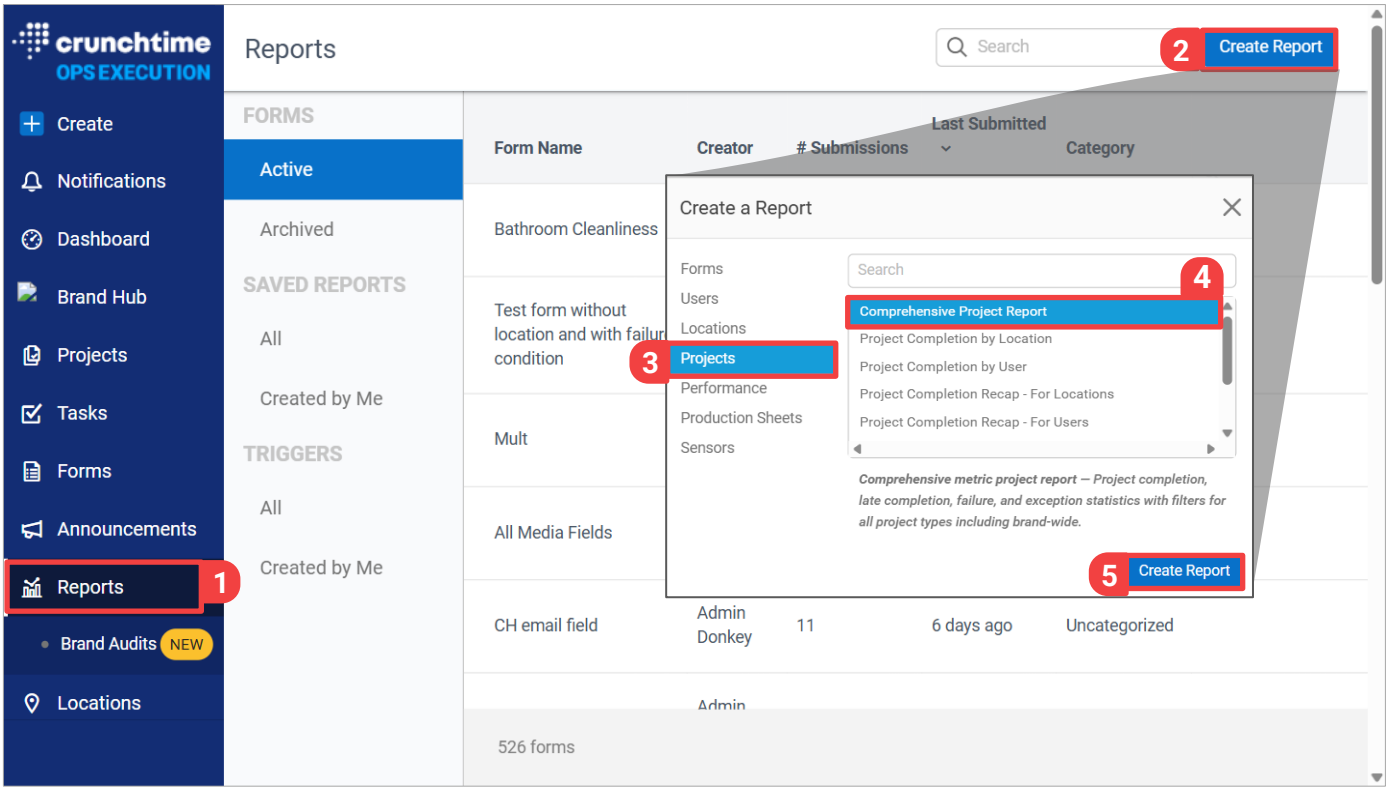
REFERENCE GUIDE

How to Access the Comprehensive Project Report

Ops Execution > Reports > Create Reports > Projects > Comprehensive Project Report



1. Select *Reports* from the main navigation.
2. Select *Create Report* in the upper right corner.
3. Choose *Projects*.
4. Choose *Comprehensive Project Report* from the list of reports.
5. Select *Create Report* to begin building a Comprehensive Project Report.

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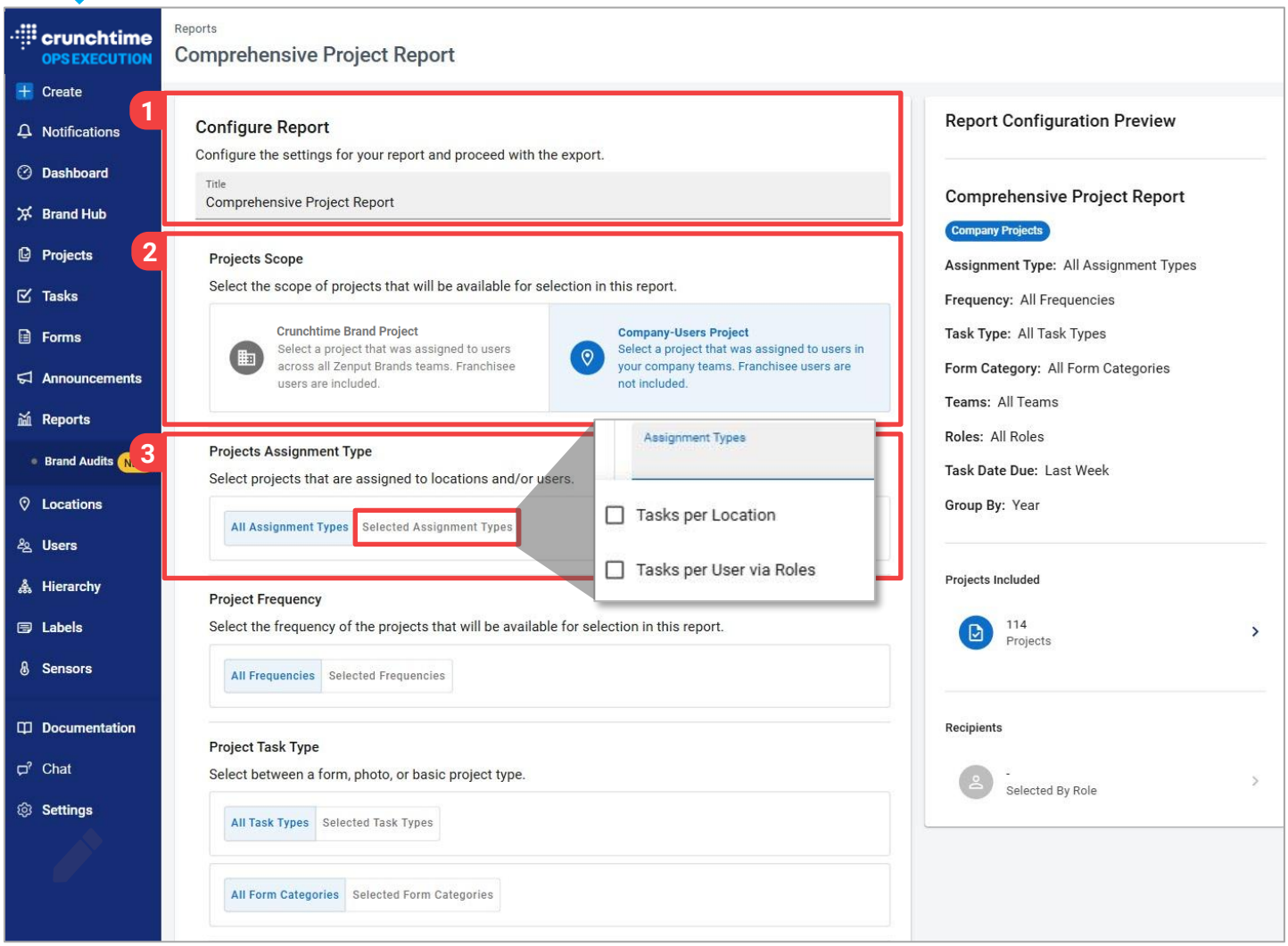
Configuring the Comprehensive Project Report

Ops Execution > Reports > Create Report > Configure



1. **Report Title:** give your report a *Title* that allows you to easily find the report later.
2. **Project Scope:** applies to Ops Execution for Franchisor customers only and designates if the report is generated from Brandwide or company projects.

Note: The main difference between creating a Comprehensive Project Report for Brandwide vs. Company is in the Filter by Hierarchy selection. Company scope selection allows team selection and Brandwide scope selection allows franchisee selection.

3. **Project Assignments Type:** refers to selecting the assignment type of projects that will be available for selection in this report – either *All Assignment Types* or only *Selected Assignment Types* (tasks per location and/or tasks via user roles).

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Configuring the Comprehensive Project Report

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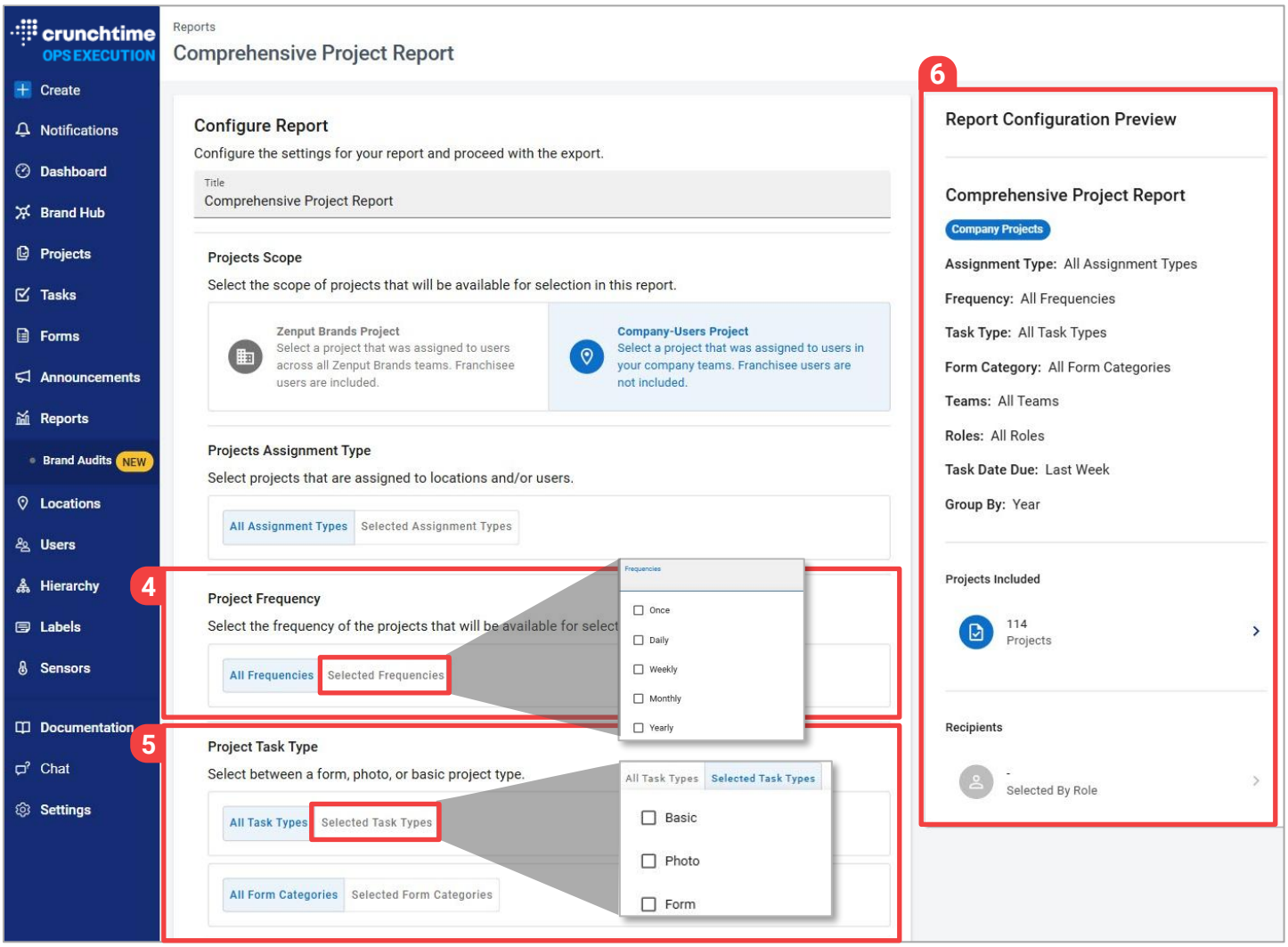
Ops Execution > Reports > Create Report > Project



4 **Project Frequency:** refers to selecting the frequency of the projects that will be available in this report – either all frequencies or selected frequencies (Once, Daily, Weekly, Monthly or Yearly).

5 **Project Task Type:** refers to selecting the type of tasks used for the projects that will be available for selection in this report -either all task types or selected task type (Basic, Photo and/or Form).

6 **Report Configuration Preview:** as you build the *Comprehensive Project Report*, you will see your selections populate in the *Report Configuration Preview*, which makes it easy to confirm your selections as you go.

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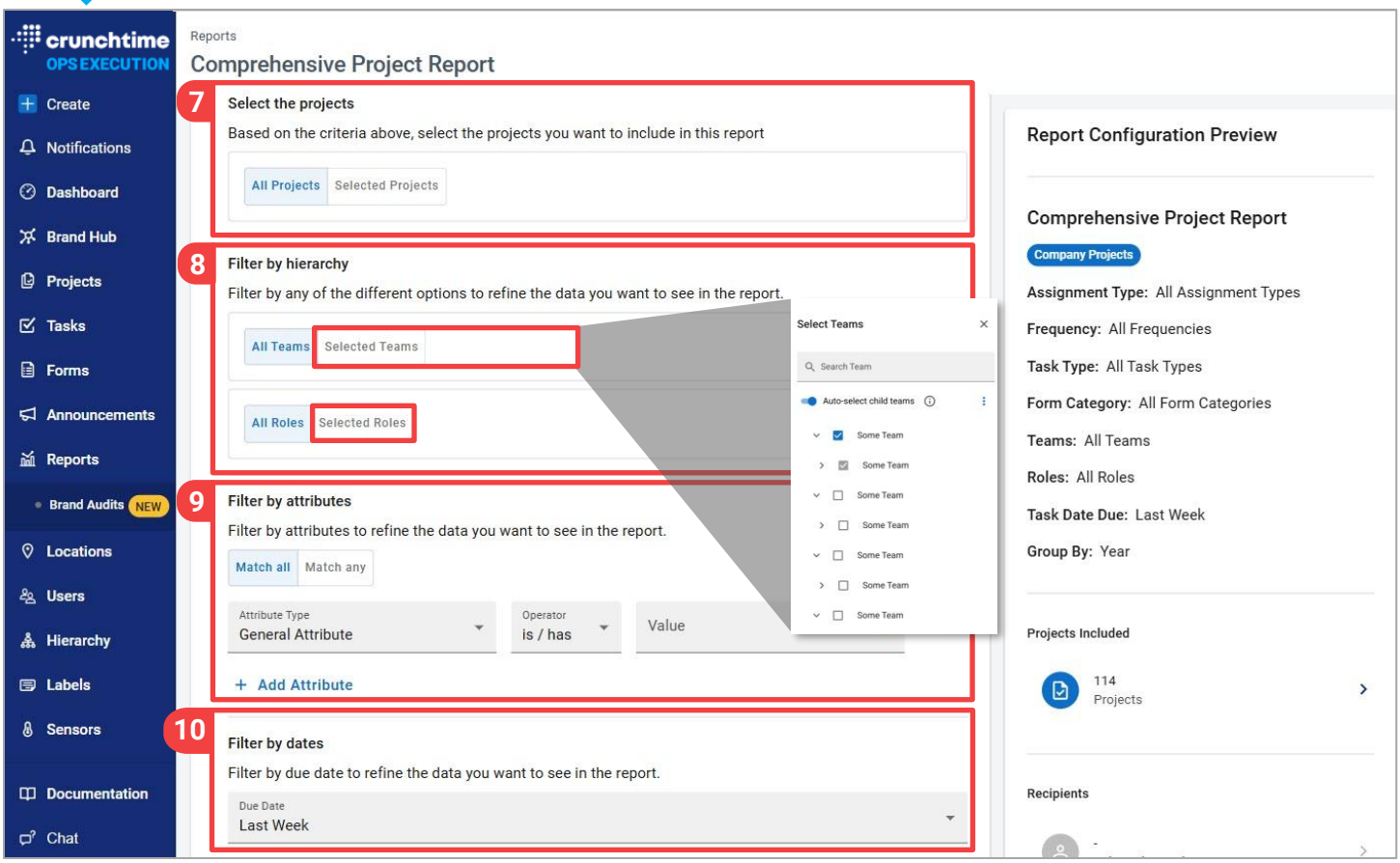
Configuring the Comprehensive Project Report (Continued)

Ops Execution > Reports > Create > Configure Report > Select the



7 **Select the Projects:** these will be unique to your business and the projects you've created.

Alert: when you use "Selected Projects" you need the previous fields to either use "All" or have selected values since the projects field is connected to them and we only show the projects that match that criteria. For example, if you haven't selected any assignment types, the projects selector is disabled because it doesn't have the criteria it needs to make the selections.

8 **Filter by Hierarchy:** companies without franchisees will select the teams you want to see in the report. Brandwide customers will see the option to select Franchisees instead of teams. Both will see the option to select All Roles or Selected Roles. **Roles** will be specific to your business.

Teams Selector -When enabled, selecting a parent team will also include all of its child teams. Future changes in the hierarchy will be automatically reflected in your selection. When disabled, you'll need to select teams individually, and future changes won't be applied.

9 **Filter by Attributes:** these will be unique to the attributes you've created in Ops Execution for your locations. Select All Attributes or select only certain attributes.

10 **Filter by dates**: filter by date to refine the data you want to see in the report.

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Configuring the Comprehensive Project Report

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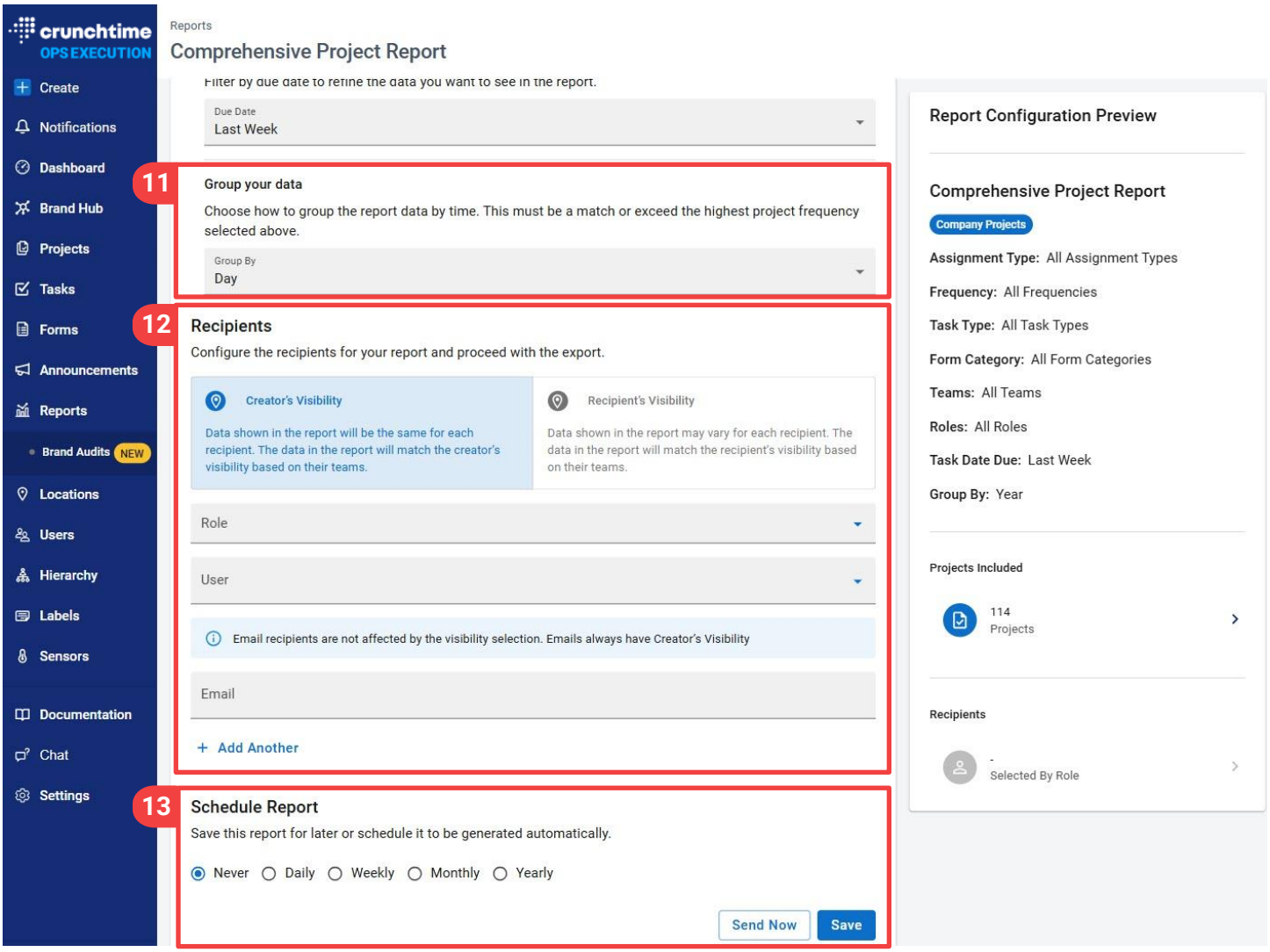
Ops Execution > Reports > Create > Configure Report > Group your



11 **Group your data:** choose how to group the report data by time. This must be a match or exceed the highest project frequency selected for Project Frequency.

12 **Recipients:** choose if you would like to send the report by Creator's Visibility or Recipient's Visbility. Sending by recipient visibility allows you to get rid of unnecessary information that does not pertain to the recipient and is a new feature of our reporting that elminates the need to create multiple reports.

13 **Schedule Report:** save the report for later (select Never/Save) or schedule it to be generated utomatically (Daily, Weekly, Monthly or Yearly.) To send the report immediately, select Send Now.

Alert: The email address field is used for anyone you'd like to receive the report that doesn't have an Ops Execution user or a user in the company within Ops Execution. These emails will always have the Creator's visibility. If you want to receive a copy yourself, be sure to enter your email address.

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Comprehensive Project Report

Controls – Configuring Your Report

User Group Control: Reports > Projects > Comprehensive Project Report

Ops Execution Web Users: Admin/Owner can now generate accurate, relevant Project reports without having to manually remove excess data after the report is generated. Reports can now also be customized by recipients by their role based on their hierarchy allowing for more personalized data and quicker insight to action for locations with issues.

Configure Report

Title: Name your report

Projects Scope: Select the scope of projects that will be available for selection in this report

Ops Execution Brands Project: Select a project that was assigned to users across all of Ops Execution teams. Franchisee users are included.

Company-Users Project: Select a project that was assigned to users in your company teams. Franchisee users are not included.

Projects Assignment Type: Select the assignment type of projects that will be available for selection in this report.

- All Assignment Types
- Selected Assignment Types
  - ☐ Tasks per Location
  - ☐ Tasks per Users via Roles

Project Frequency: Select the frequency of the projects that will be available for selection in this report.

- **All Frequencies**
- **Selected Frequencies**
  - ☐ Once
  - ☐ Daily
  - ☐ Weekly
  - ☐ Monthly
  - ☐ Yearly

Project Task Type: Select the type of tasks used for the projects that will be available for selection in this report.

- **All Task Types**
- **Selected Task Types**
  - ☐ Basic
  - ☐ Photo
  - ☐ Form
    - **All Categories**
    - **Selected Categories**

      Select the Form Category for your report or All Categories to ensure every form category is included.

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Filter by hierarchy: Filter by any of the different options to refine the data by teams you want to see in the report.
Brandwide: All Franchisees or Selected Franchisees
Filter by attributes Filter by attributes to refine the data you want to see in the report. You can also add an attribute if you'd like.

- **Match all tab:** Select Attribute Type, Operator (is/has, is not/has not, is any of) and Value (appears based on the attribute you select).
- **Match any tab:** Select Attribute Type, Operator (is/has, is not/has not, is any of) and Value (appears based on the attribute you select)

Filter by dates: Filter by due date to refine the data you want to see in the report. Options include Yesterday, This Week, Last Week, This Month, Last Month, Previous, and Between.
Group your data: Choose how to group the report data by time. This must match or exceed the highest project frequency selected above. Options are Day, Week, Month, and Year.
Recipients: Configure the recipients for your report and proceed with the export.

- **Creator's Visibility:** Data shown in the report will be the same for each recipient. The data in the report will match the creator's visibility based on their teams in the hierarchy.
- **Recipient's Visibility:** Data shown
    - Role
    - User
    - Email

Schedule Report
Save this report for later or schedule it to be generated automatically. Options are:

- Never
- Daily
- Weekly
- Monthly
- Yearly

You can then opt to **<Send Now>** or **<Save>** the report.

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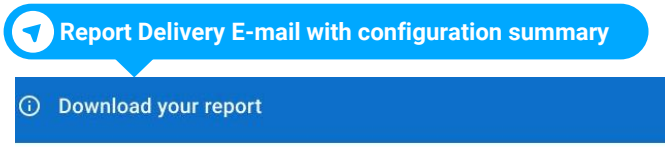
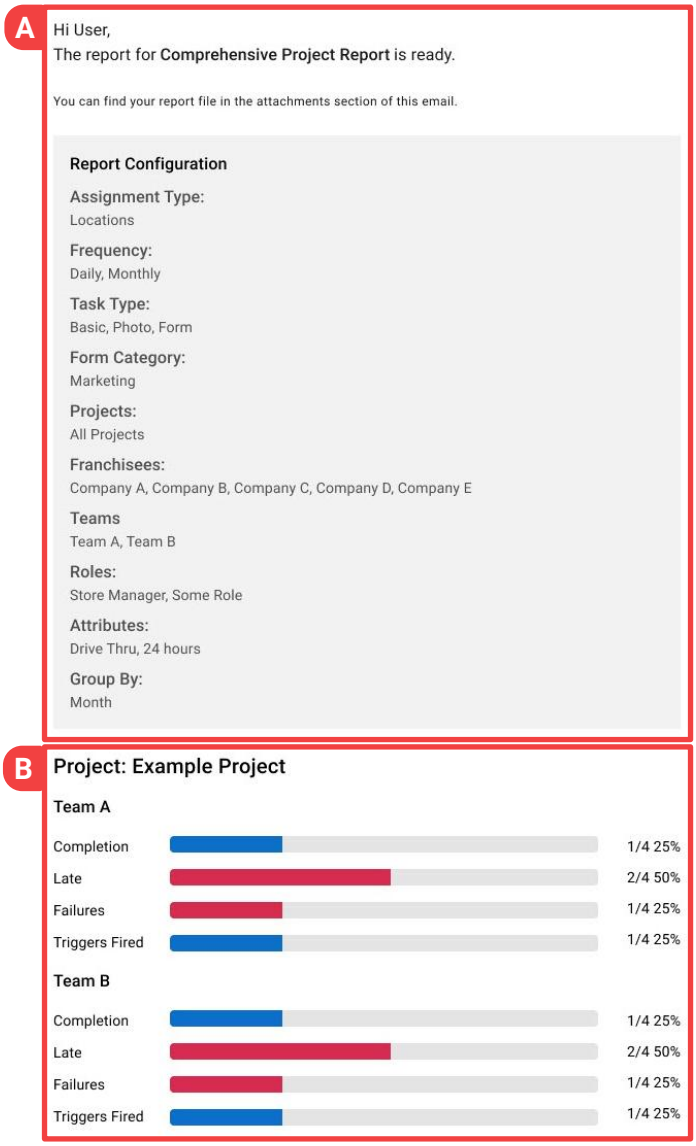
Delivery e-mail for the Comprehensive Project Report





A Summary of the configuration selected for this report will appear at the top of the email and includes all of the configuration details from the report creation.

B A snapshot of each team's performance showing completion percentage, tasks completed late, failures and triggers fired.

The report itself is attached to the email and can be saved/downloaded as an excel file.

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Download your report

Hi User,
The report for **Comprehensive Project Report** is ready.

C



The report is empty

The report contains no information. If this continues to happen or you think it is an error, please contact the creator of this report.

Report Configuration

Assignment Type:
Tasks per Location, Tasks per User via Roles

Frequency:
Daily, Monthly

Task Type:
Basic, Photo, Form

Form Category:
Marketing

Projects:
All Projects

Franchisees:
Company A, Company B, Company C, Company D, Company E

Teams
Team A, Team B

Roles:
Store Manager, Some Role

Attributes:
Drive Thru, 24 hours

Group By:
Month

Thanks,
The Ops Execution Team

C It is possible, depending on the configuration of the report, to receive an email notifying the recipient that the report is empty. In this case, configure the report differently or request that the creator reconfigures it. If you think it's an error, also contact the creator.

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Comprehensive Project Report

Understanding the Report

Report attached to email (.xlsx file)

				A	Project Type	D	Total																E
					Project Frequency																		
					Unique Project Title																		371412880 -
					Role Name																		Smooth O
B				C		(01) Completion Rate	(02) Completed Late Rate	(03) Completed with Failures Rate	(04) Completed with Triggers Fired Rate	(05) Completed Count	(06) Completed Late Count	(07) Completed with Failures Count	(08) Completed with Triggers Fired Count	(09) Avg Time to Complete	(10) Min Time to Complete	(11) Max Time to Complete	(12) Avg Distance to Location	(13) Min Distance to Location	(14) Max Distance to Location	(15) Total Number of Tasks	(01) Completion Rate	(02) Completed Late Rate
Company Name	Level 1	Level 2	Location or User Name	Day																			
Total						90%	9%	54%	0%	4398	384	2374	0	5:30:44	0:00:43	20:31:23	0.41	0	45.12981	4868	86%	6%
Zenputz						90%	9%	54%	0%	4398	384	2374	0	5:30:44	0:00:43	20:31:23	0.41	0	45.12981	4868	80%	0%
	1 - Bakery team test					82%	0%	56%	0%	18	0	10	0	12:06:05	0:04:04	7:02:25	0	0	0	22	80%	0%
		-				80%	0%	75%	0%	4	0	3	0	7:37:20	0:08:48	5:43:12	N/A	N/A	N/A	5	80%	0%
						80%	0%	75%	0%	4	0	3	0	7:37:20	0:08:48	5:43:12	N/A	N/A	N/A	5	80%	0%
						80%	0%	50%	0%	4	0	2	0	0:18:55	0:10:23	0:31:49	0	0	0	5	80%	0%
						80%	0%	50%	0%	4	0	2	0	0:18:55	0:10:23	0:31:49	0	0	0	5	80%	0%
			Unit 51, 33 Main Street			80%	0%	100%	0%	4	0	4	0	20:27:47	0:04:04	7:02:25	0	0	0	5	100%	0%
				2026-03-02		80%	0%	100%	0%	4	0	4	0	20:27:47	0:04:04	7:02:25	0	0	0	5	100%	0%
				2026-03-03		100%	0%	20%	0%	5	0	1	0	1:35:48	0:06:32	3:04:08	0	0	0	5	44%	0%
				2026-03-04		100%	0%	20%	0%	5	0	1	0	1:35:48	0:06:32	3:04:08	0	0	0	5	44%	0%
				2026-03-05		50%	0%	0%	0%	1	0	0	0	0:14:26	0:14:26	0:14:26	N/A	N/A	N/A	2	100%	20%
				2026-03-06		50%	0%	0%	0%	1	0	0	0	0:14:26	0:14:26	0:14:26	N/A	N/A	N/A	2	100%	20%
				2026-03-07		86%	6%	57%	0%	102	6	58	0	11:11:22	0:02:45	7:02:25	0	0	0	119	100%	20%
				2026-03-08		80%	0%	75%	0%	16	0	12	0	7:37:20	0:08:48	5:43:12	N/A	N/A	N/A	20	100%	20%
			Unit 21, Dunfermline Business Park, Primrose Lane			80%	0%	75%	0%	16	0	12	0	7:37:20	0:08:48	5:43:12	N/A	N/A	N/A	20	82%	1%
				2026-03-02		80%	0%	50%	0%	16	0	8	0	0:18:55	0:10:23	0:31:49	0	0	0	20	75%	0%
				2026-03-03		80%	0%	50%	0%	16	0	8	0	0:18:55	0:10:23	0:31:49	0	0	0	20	75%	0%
				2026-03-04		80%	0%	100%	0%	16	0	16	0	20:27:47	0:04:04	7:02:25	0	0	0	20	71%	0%
				2026-03-05		80%	0%	100%	0%	16	0	16	0	20:27:47	0:04:04	7:02:25	0	0	0	20	42%	3%
				2026-03-06		100%	0%	20%	0%	20	0	4	0	1:35:48	0:06:32	3:04:08	0	0	0	20	86%	6%
				2026-03-07		100%	0%	20%	0%	20	0	4	0	1:35:48	0:06:32	3:04:08	0	0	0	20	80%	0%
				2026-03-08		44%	0%	0%	0%	4	0	0	0	0:14:26	0:14:26	0:14:26	N/A	N/A	N/A	9	80%	0%
	ABC					44%	0%	0%	0%	4	0	0	0	0:14:26	0:14:26	0:14:26	N/A	N/A	N/A	9	80%	0%
		-				100%	20%	40%	0%	15	3	6	0	16:01:51	0:02:45	2:28:36	0	0	0	15	80%	0%
						100%	20%	40%	0%	15	3	6	0	16:01:51	0:02:45	2:28:36	0	0	0	15	80%	0%
						100%	20%	80%	0%	15	3	12	0	1:58:12	0:06:23	8:30:11	0	0	0	15	80%	0%
						100%	20%	80%	0%	15	3	12	0	1:58:12	0:06:23	8:30:11	0	0	0	15	100%	0%
			2200 Crystal Drive 2200 Crystal DrArlington, VA 22202, USA			82%	1%	3%	0%	958	10	32	0	0:23:03	0:00:43	7:22:29	0.24	0	35.05200	1162	100%	0%
				2026-03-02		75%	0%	6%	0%	124	0	8	0	0:37:09	0:01:06	23:17:03	11.68	0	35.05200	166	44%	0%
				2026-03-03		75%	0%	7%	0%	114	0	8	0	0:40:01	0:01:06	23:17:03	11.68	0	35.05200	152	44%	0%
				2026-03-04		71%	0%	0%	0%	10	0	0	0	0:04:30	0:02:30	0:06:06	N/A	N/A	N/A	14	100%	20%
				2026-03-05		42%	3%	3%	0%	70	2	2	0	1:29:17	0:02:31	7:22:29	7.1	0	14.20628	166	100%	20%
				2026-03-06		43%	3%	3%	0%	66	2	2	0	1:33:53	0:02:31	7:22:29	7.1	0	14.20628	152	100%	20%

A The top rows identify the Project Type, Project Frequency, Unique Project Title and Role Name.

B The far right columns indicate which teams this report focuses on, as identified in the report configuration. All teams in the Hierarchy will be visible in the report. See below for more information on how to collapse columns in Excel and Google Sheets for better visibility of the completion data.

C This column indicates the timeframe selected for the report.

D The first selection of data will be the consolidated data for the total number of projects selected. Color coding helps to easily spot who is doing well and who is not. As you scroll to the right, sections A, B, and C stay frozen and visible as you view completion data for each project.

- For completion rate, since a high percentage is good:
  - 80-100% Good (green)
  - 50-79% Regular
  - 0-49% Bad (red)
- For the completed late, and with failures, a high percentage is bad:
  - 80-100% Bad (red)
  - 50-79% Regular (yellow)
  - 0-49% Good (green)

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E Data appearing to the right will include the same columns for each individual project selected in the configuration.

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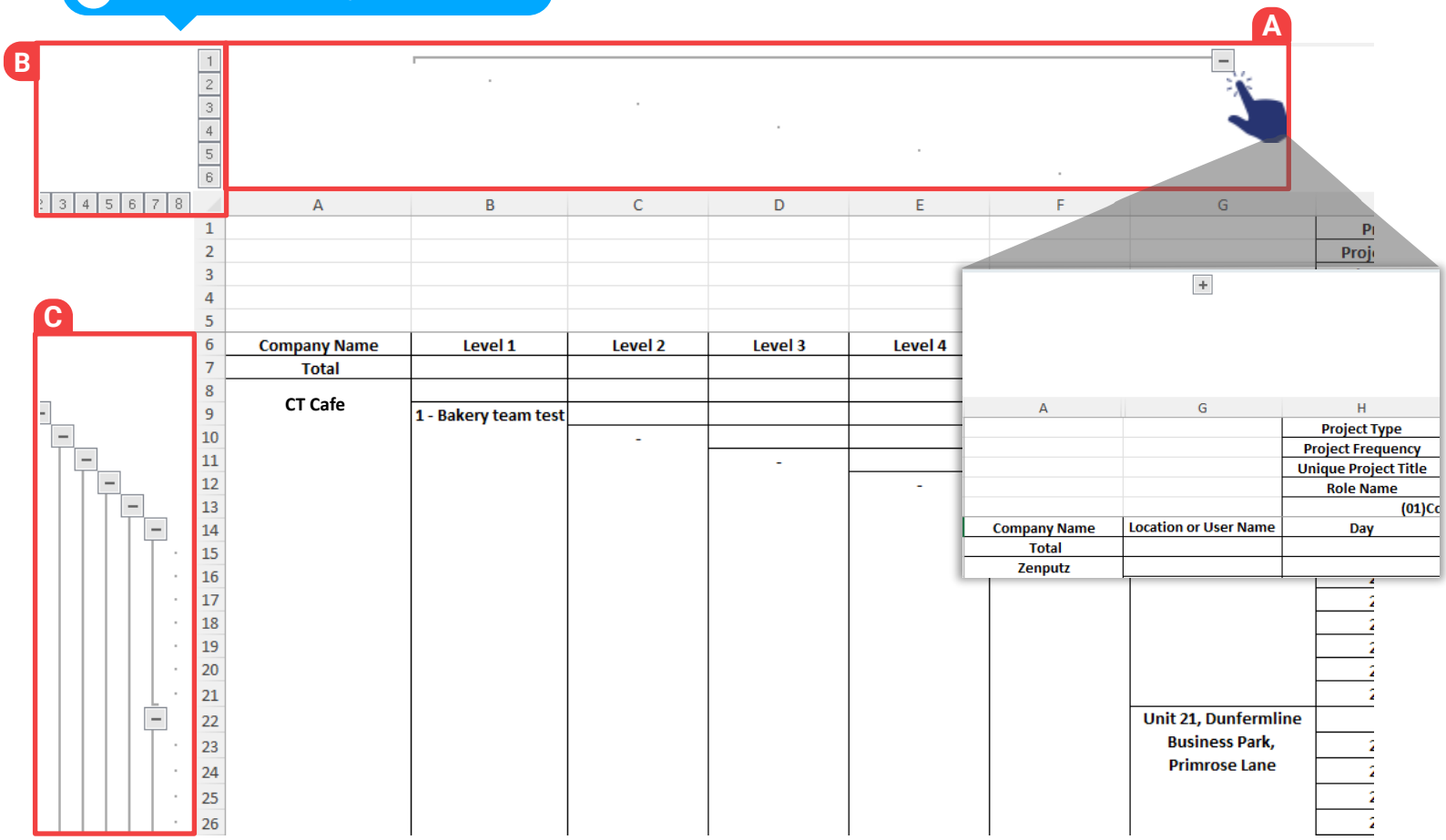
Comprehensive Project Report

Utilizing the Report

Collapsing the Hierarchy in Excel



A When you open the report in Excel, the Hierarchy (teams levels) will be expanded by default. Use the (-) button to collapse the Hierarchy. Selecting the (+) or (-) buttons in this section either expand or collapse the entire Hierarchy.

B Use these numbered buttons to expand or collapse the columns (teams) individually. The numbered buttons along the bottom expand or collapse the rows vertically, while the numbered buttons along the side expand or collapse the columns horizontally.

C The collapse functionality on the far left side also allows you to expand or collapse the vertical rows.

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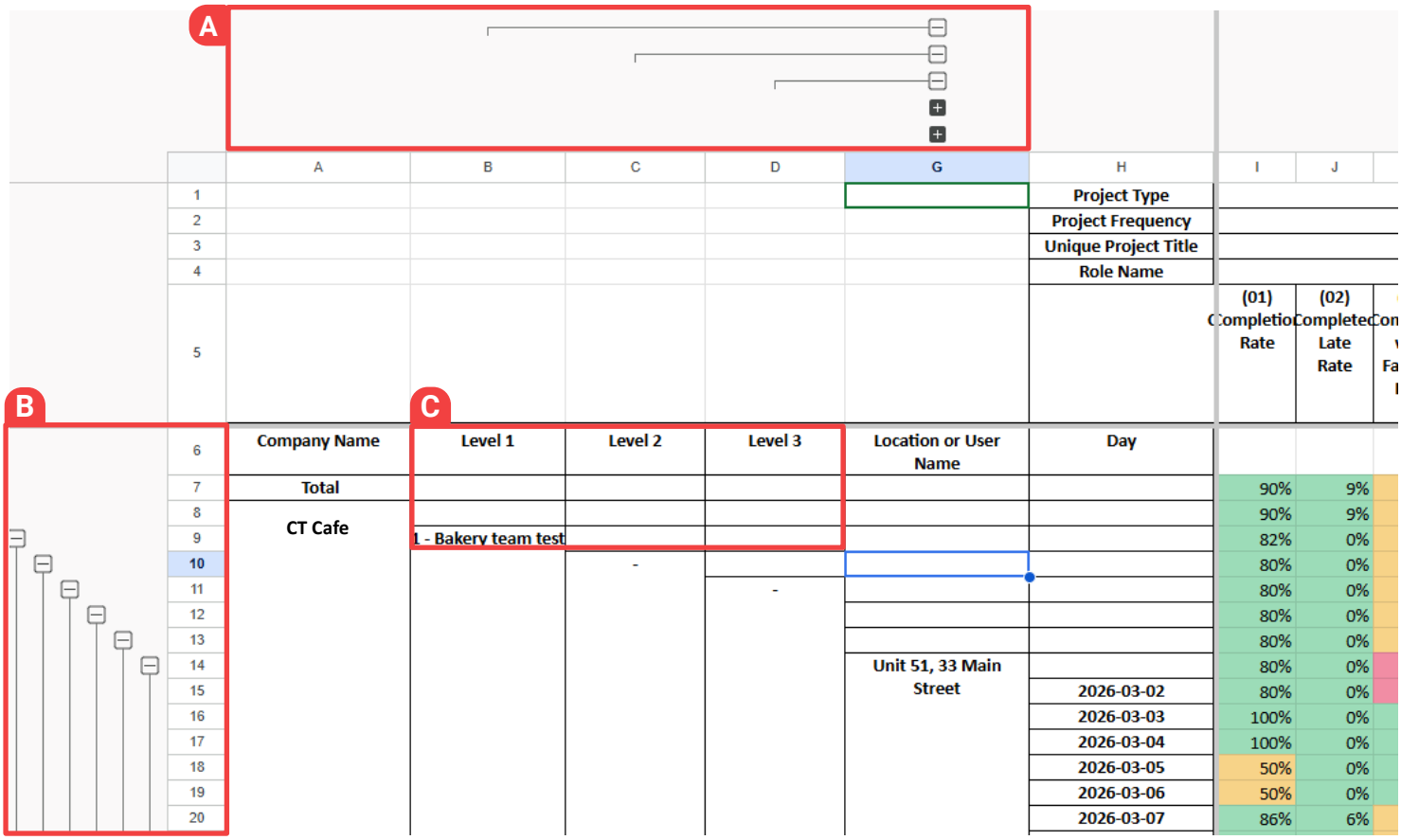
Comprehensive Project Report

Utilizing the Report

Collapsing the Hierarchy in Google Sheets



A In Google Sheets, the Hiearchy will also be included by default. Use the the collapse functionality at the top to either expand or collapse the columns (teams) in the report individually use the (-) or (+) buttons.

B The collapse functionality on the far left allows you to expand or collapse the rows included in your report.

C This shows the different levels of the Hierarchy within your report and can be expanded or collapsed by selecting the (+) or (-) buttons in Section A.

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Understanding the Comprehensive Project Report

Report Columns: Click any column header in the report to sort by the data in that column.

Project Type:	Location or User via roles (Role-based Project)
Project Frequency:	The frequency of the projects that will be available for selection in this report.
Unique Project Title:	The name of the project.
Role Name:	The role selected for visibility.
Company Name:	Denotes the company associated with the file(s).
Team Name:	Denotes the team associated with the file(s).
Location or Username:	Based on the recipient selection made in the configuration.
Day, Week, Month, Year:	Based on what was selected for how to group data by time.
Completed with Failures Rate:	The percentage of tasks completed with failed outcomes because of pass/fail and range settings in the form builder. Multiple choice questions do not have an evaluation field, so they are never counted as failures.
Completed with Triggers Fired Rate:	The percentage of tasks completed with at least one trigger fired.
Completed Count:	The number of tasks completed.
Completed Late Count:	The number of tasks completed late.
Completed with Failures Count:	The number of tasks completed with failed outcomes because of pass/fail settings in the form builder. Multiple choice questions do not have an evaluation field, so they are never counted as failures.
Completed with Triggers Fired Count:	The number of tasks completed with at least one trigger fired.
Average Time to Complete:	The average time it took to complete the task. Average can look good, but minimum time to complete will identify pencil-whipping and maximum time to complete indicates tasks are taking too long to complete.
Minimum Time to Complete:	The shortest amount of time it took a user and/or location to complete the task.
Maximum Time to Complete:	The longest amount of time it took a user and/or location to complete the task.
Average Distance to Location:	The average distance to location where tasks were completed.
Minimum Distance to Location:	The furthest distance a task was completed away from the location.
Maximum Distance to Location:	The shortest distance a task was completed away from the location.
Total Number of Tasks:	The total number of tasks assigned.

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