

**ORACLE<sup>®</sup>**

---

**PRIMAVERA**

**New Features in Instantis EnterpriseTrack 8.7**

March 2014

---

## COPYRIGHT & TRADEMARKS

Copyright © 2014, Oracle and/or its affiliates. All rights reserved.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

### **U.S. GOVERNMENT RIGHTS**

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.

---

# CONTENTS

- New Features in Instantis EnterpriseTrack 8.7 .....1**
- Timesheet Module Improvements .....2
- Storyboard Report .....4
- Project Start Date Calculated Using Proposal Close Date .....5
- Custom Fields .....6
- Predefined Dependencies in Activity Templates .....7
- Finance Report Changes .....8
- IP Address Restriction .....9
- SSO Improvements .....10
- Company Logos .....12
- Fast Track Templates .....13
- Technical Enhancements .....14

## New Features in Instantis EnterpriseTrack 8.7

Learn about new features in Instantis EnterpriseTrack 8.7 using the software simulations on this site or by reading the PDF. ([http://docs.oracle.com/cd/E50622\\_01/English/User\\_Guides/EnterpriseTrack\\_Whats\\_New.pdf](http://docs.oracle.com/cd/E50622_01/English/User_Guides/EnterpriseTrack_Whats_New.pdf))

The screenshot displays the Oracle Instantis EnterpriseTrack 8.7 interface. At the top, there are navigation buttons: 'Go To', 'Create', 'My EnterpriseTrack', and 'View'. Below this, the status is 'Open' and the week is 'Mar/16/2014 - Mar/22/2014'. There are also buttons for 'Collapse All' and 'Show Overtime Input'.

The main area shows a 'Project Time Reporting' table with columns for 'Category', 'Type', 'Path', and days of the week (Sun 16, Mon 17, Tue 18, Wed 19, Thu 20, Fri 21, Sat 22), followed by 'Total Effort', 'Overtime Effort', 'Estimated Time to Complete', 'As Of Date', and 'Expect Remai Effo'. The table contains two rows of data for 'Project: Instantis EnterpriseTrack deployment for ...' and 'Project Time'.

An 'Administration: Edit Pre-defined Field' dialog box is overlaid on the table. It contains the following fields and options:

- Field Name \***: Charter buildup details
- Field Type**: File
- UI Section**: Proposal Custom Fields (dropdown)
- Visible**:  Yes  No
- Display In Filter**:  Yes  No
- Display On List Page**:  Yes  No
- Required**: No
- Sort Order**: 8500
- Idea Custom Field Mapping**: Additional Info (dropdown)

At the bottom of the dialog are 'Update' and 'Cancel' buttons. Below the dialog, there is a table for 'Est. Stage Dates' with columns for 'Start' and 'Completion'. The 'Start' date is 'Jan/13/2015 (Tuesday)' and the 'Completion' date is 'Feb/02/2015 (Monday)'. Below this table, there are fields for 'Calculated Planned Project Start Date' (Jan/13/2015 (Tuesday)) and 'Planned Project Start Date' (Jan/13/2015), with an 'Apply' button next to the first field.

Key enhancements in Instantis EnterpriseTrack 8.7 include:

- Improved storyboard report
- Project start date calculated using proposal end date
- Timesheet module improvements
- Custom field improvements
- Pre-defined dependencies in activity templates
- Improved finance reports
- New administrative reports
- Improved data import
- IP address restriction
- SSO generalization
- Company logos
- Technical enhancements

### Timesheet Module Improvements

The Timesheets module in EnterpriseTrack 8.7 features enhanced integration with ERP and financial system applications. Timesheet administrators can close timesheet periods and freeze timesheets from further modifications. When necessary, timesheet administrators can also allow controlled corrections to the timesheets in the closed periods and extract just the timesheet data for the corrections.

A new API for the Timesheet Detail Report provides timesheet correction support and improved data extraction for ERP integration. Timesheet administrators can now set timesheet close periods, reopen periods for correction, and view a summary breakdown of timesheet reporting statuses via a new Verify Timesheet Reporting Status report. The Verify Timesheet Reporting Status report lists the number of timesheets not created, pending submission, pending approval, approved, and the total number of timesheets created during the close period. The report helps administrators resolve missing or incomplete timesheets before closing a timesheet period.

Administration : Manage Timesheet Settings

**Timesheet Close Period**

Timesheet Periods Close Status: Closed up to Mar/22/2014 [Reopen for Correction](#)

Close Timesheet Periods: Mar/29/2014 [Close Timesheet Period](#)

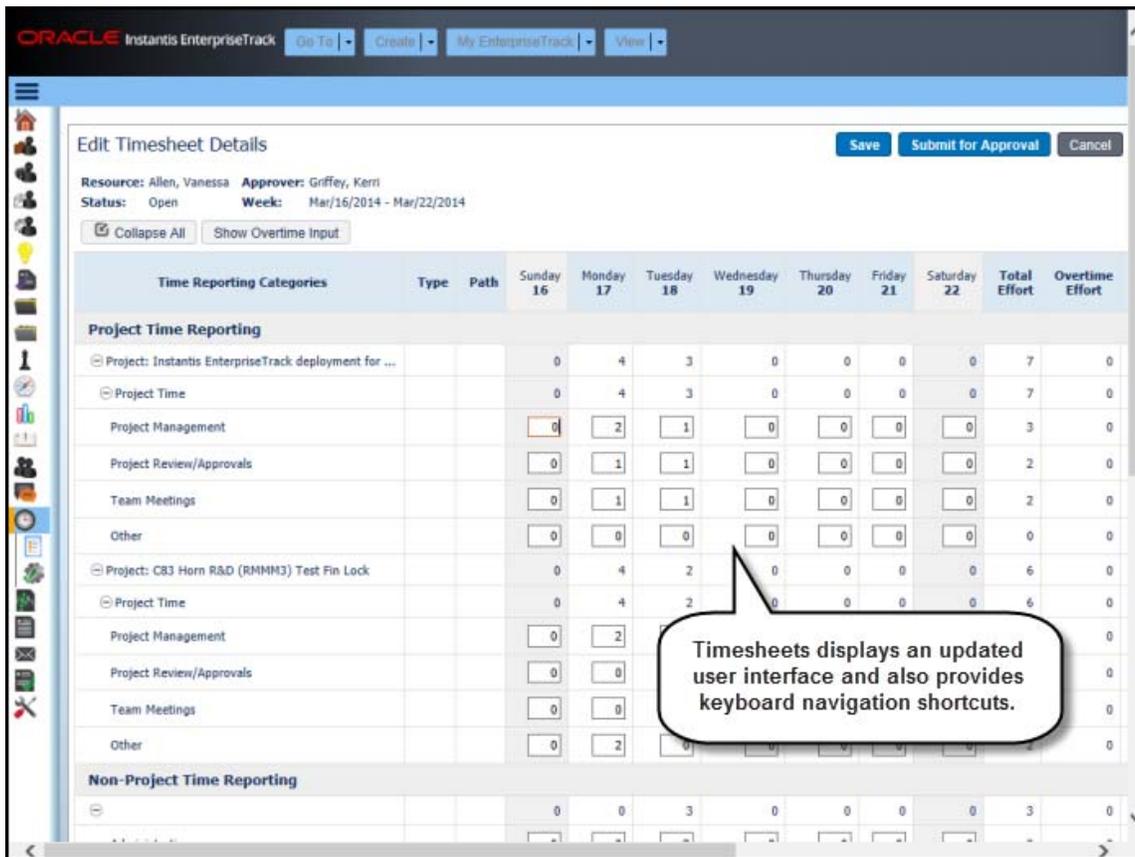
Close all Timesheets periods up to specified date.

**Verify Timesheet Reporting Status**

Close Period Start Date\* Mar/23/2014 [Close Period End Date\\*](#)

Timesheet administrators can close timesheet periods and freeze timesheet data.

On the user side, the Timesheets module displays a new interface with non-working days highlighted on the resource calendar and keyboard navigation shortcuts.



Time Reporting Categories	Type	Path	Sunday 16	Monday 17	Tuesday 18	Wednesday 19	Thursday 20	Friday 21	Saturday 22	Total Effort	Overtime Effort
<b>Project Time Reporting</b>											
Project: Instantis EnterpriseTrack deployment for ...			0	4	3	0	0	0	0	7	0
Project Time			0	4	3	0	0	0	0	7	0
Project Management			0	2	1	0	0	0	0	3	0
Project Review/Approvals			0	1	1	0	0	0	0	2	0
Team Meetings			0	1	1	0	0	0	0	2	0
Other			0	0	0	0	0	0	0	0	0
Project: C83 Horn R&D (RMM3) Test Fin Lock			0	4	2	0	0	0	0	6	0
Project Time			0	4	2	0	0	0	0	6	0
Project Management			0	2							0
Project Review/Approvals			0	0							0
Team Meetings			0	0							0
Other			0	2							0
<b>Non-Project Time Reporting</b>											
			0	0	3	0	0	0	0	3	0

### Benefits:

- Better governance with timesheet data locked during close periods and timesheet status report.
- Expanded control of timesheet correction and ERP data extraction through the Timesheet Detail Report API.
- Better user experience with the new UI and keyboard shortcuts.

**Location:** On the Go To menu on the Top Navigation bar:

- Click Timesheets, Administration to manage timesheet settings.
- Click Timesheets, Listing to create a timesheet and view the new UI.
- Click Reports, Standard to run the Timesheet Detail Report for data correction and ERP integration.

### Storyboard Report

EnterpriseTrack's PowerPoint storyboard report is enhanced for 8.7 with an updated interface and the ability to customize the report.

The report's new look matches the overall user interface of EnterpriseTrack and other Primavera products. New options enable you to customize and upload multiple PowerPoint templates and then generate storyboard reports by selecting storyboard components, their order, and a template for custom theme, style, and logo.



#### Benefits:

- Better control over report elements and appearance.
- Easy report maintenance.
- Better user experience.

**Location:** On the Go To menu on the Top Navigation bar, click Reports, Standard. In the Tree section of the Manage Reports page, expand Global Reports and Project Reports, and select the Detail Reports folder. In the List section of the Manage Reports page, click Project Storyboard.

## Project Start Date Calculated Using Proposal Close Date

EnterpriseTrack 8.7 enables you to use a project's planned close date to calculate its start date. Use the new option on the proposal Dates/Durations tab to select either the prospective project's planned start date or planned close date for initial date calculations. After a project roadmap/schedule is specified, EnterpriseTrack calculates the corresponding close or start date using the estimated durations of the project phases. This feature is important to users who must plan and execute projects, such as marketing campaigns or business openings, to coincide with a pre-determined target date.

**Basis for Initial Calculation:**

Planned Project Start Date

Planned Project Close Date

Planned Project Close Date: Feb/02/2015

Stage	Est. Stage Duration (Calendar Days)	Est. Stage Dates	
		Start	Completion
Define	40	May/12/2014 (Monday)	Jul/07/2014 (Monday)
Measure	40	Jul/07/2014 (Monday)	Sep/01/2014 (Monday)
Analyze	30	Sep/01/2014 (Monday)	Oct/13/2014 (Monday)
Design	40	Oct/13/2014 (Monday)	Dec/08/2014 (Monday)
Verify	40	Dec/08/2014 (Monday)	Feb/02/2015 (Monday)
Realization	365		

Calculated Planned Project Start Date: May/12/2014 (Monday) **Apply**

Planned Project Start Date:

Charter Milestone

Charter Impact Date

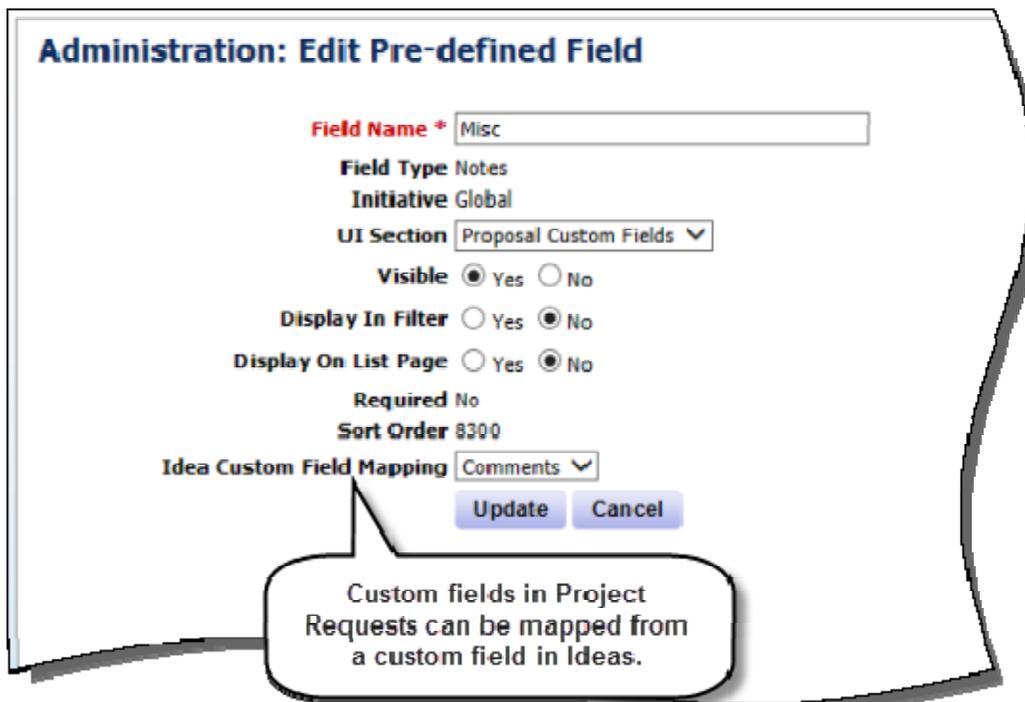
**Benefit:** More flexibility in project planning and creation.

**Location:** Click the Dates/Durations tab for a selected proposal/project request.

### Custom Fields

Custom field functionality is enhanced in EnterpriseTrack 8.7 to enable pre-defined and user-defined custom fields in the Ideas module to be mapped to the Project Requests/Proposals module when creating a proposal from an idea. In addition, administrators can specify the section in which a custom field displays when configuring custom fields for the Ideas, Proposals, or Projects modules. Administrators can also make new or existing custom fields in the Ideas or Projects modules context-sensitive by choosing to display a field only when the selected value in a related field meets certain conditions.

EnterpriseTrack 8.7 also provides a new custom field type, Notes, for entering multi-line, free-form text. The field is displayed as a text box in the user interface and accepts up to 4,000 English characters.



**Administration: Edit Pre-defined Field**

Field Name \* Misc

Field Type Notes

Initiative Global

UI Section Proposal Custom Fields ▼

Visible  Yes  No

Display In Filter  Yes  No

Display On List Page  Yes  No

Required No

Sort Order 8300

Idea Custom Field Mapping Comments ▼

Update Cancel

Custom fields in Project Requests can be mapped from a custom field in Ideas.

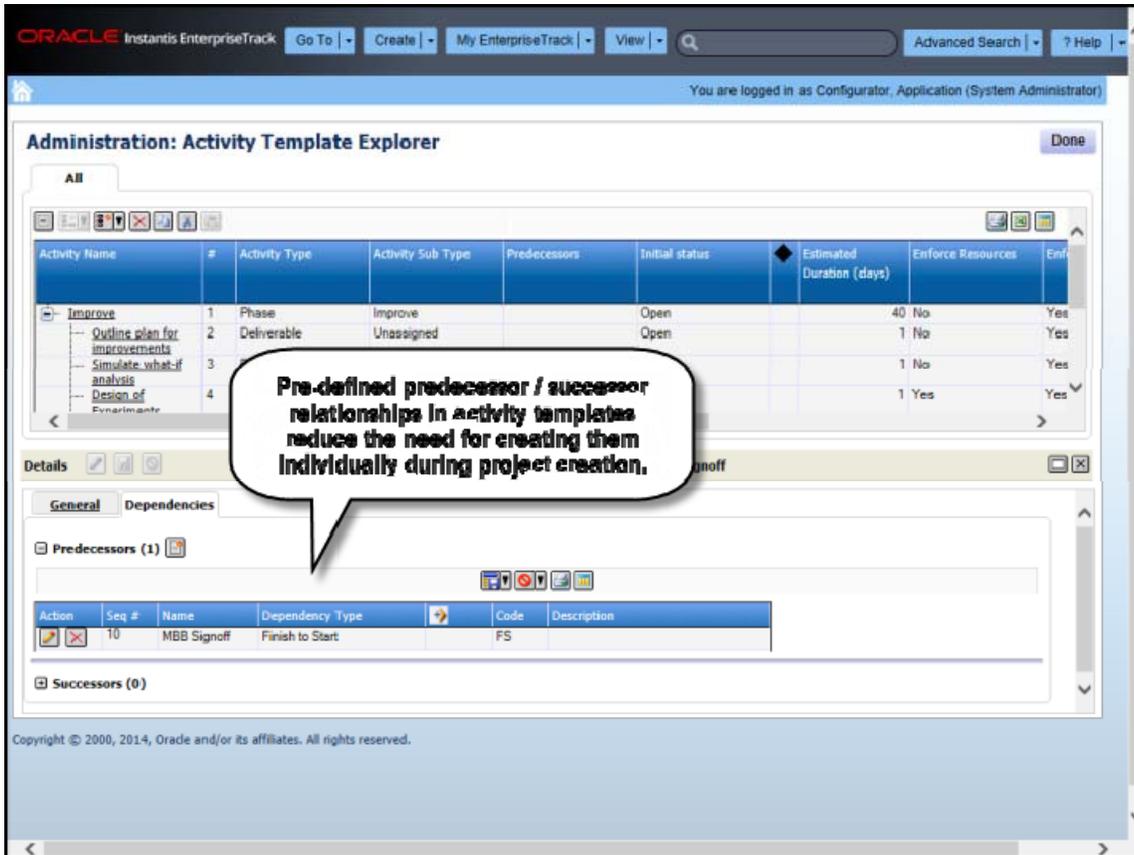
#### Benefits:

- Better user experience, information organization, and logical presentation with the configurable layout and placement for custom fields.
- Support business processes with context-sensitive custom fields, reduces potential for data entry errors.

**Location:** On the Go To menu on the Top Navigation bar, click Administration. On the Application Configuration tab, click Custom Fields.

## Predefined Dependencies in Activity Templates

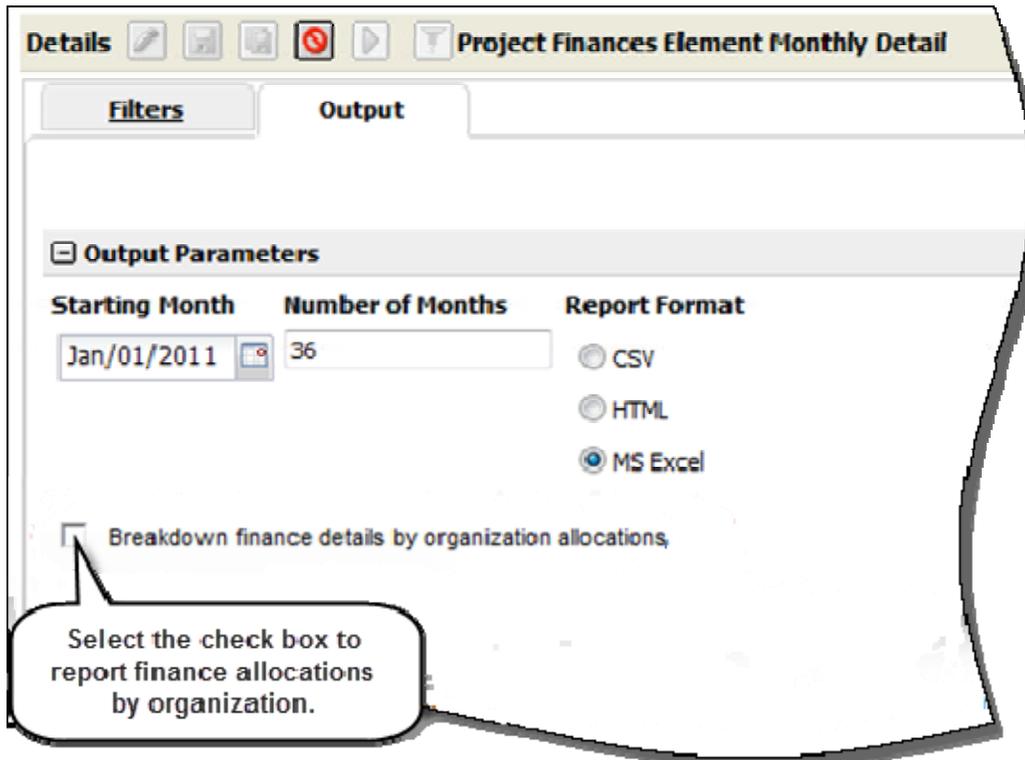
A new feature in EnterpriseTrack 8.7 enables administrators to predefine activity predecessor/successor relationships within activity templates. As activity templates are sequenced to create a project schedule, the predefined relationships are automatically copied into the project WBS -- greatly reducing the need to manually create individual activity relationships during project creation. This new feature supports all relationship/dependency types (finish to start, start to start, finish to finish, start to finish), lag, and multiple predecessors or successors.



**Location:** On the Go To menu on the Top Navigation bar, click Administration. On the Application Configuration tab, click Activity Templates.

### Finance Report Changes

Most finance reports in EnterpriseTrack 8.7 now reflect percent allocation for projects with multiple organization hierarchies. A new option on the Output tab on the Manage Reports page enables you to expand and break down each finance line in the report to display amounts allocated to each organization. The option is not selected by default.

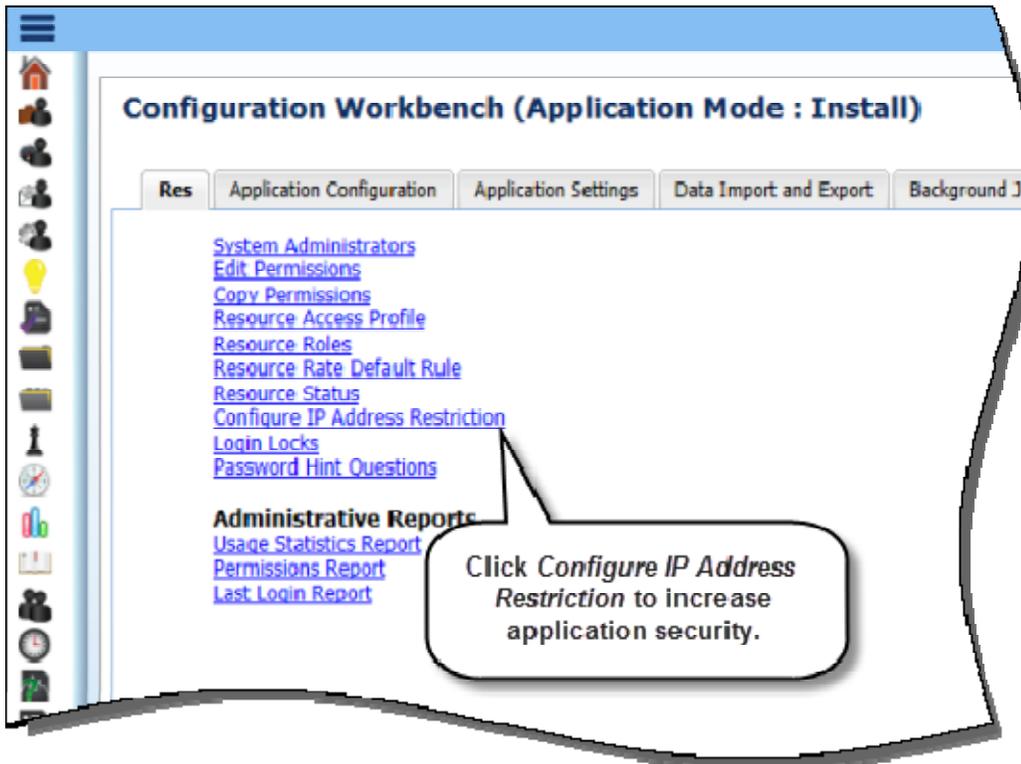


**Benefit:** Ability to perform financial data analysis by organization

**Location:** On the Go To menu on the Top Navigation bar, click Reports, Standard.

### IP Address Restriction

EnterpriseTrack 8.7 enables you to restrict access to the EnterpriseTrack Login and/or the Idea Portal page except from specified IP addresses. A new option, Configure IP Address Restriction, displays on the Configuration Workbench Resource and Security Admin tab when the application is in the Install or Reconfigure mode.



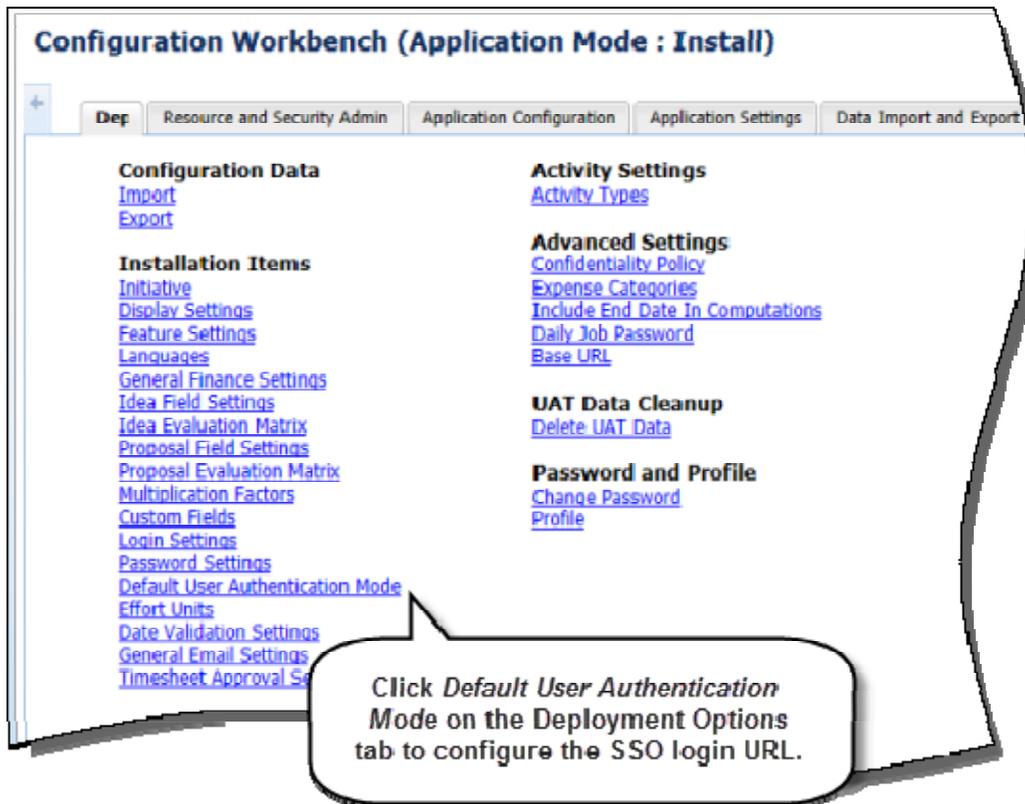
#### Benefits:

- Improved application security
- No need for customization

**Location:** With EnterpriseTrack in the Install or Reconfigure mode, click Configure IP Address Restriction on the Resource and Security Admin tab of the Configuration Workbench.

### SSO Improvements

An option added to the Administration console in EnterpriseTrack 8.7 enables administrators to configure the Single Sign On (SSO) login URL to access the EnterpriseTrack portal when the default authentication mode is SSO. The SSO logout URL can also be configured.



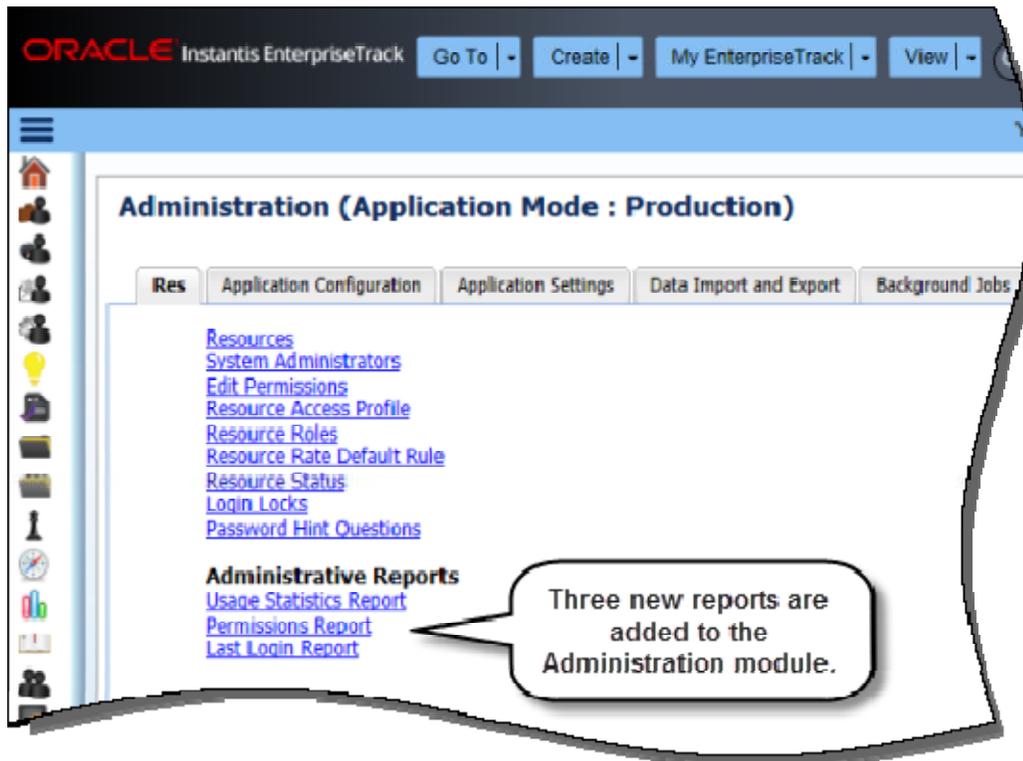
**Benefit:** Improved application security.

**Location:** Click Default User Authentication Mode on the Deployment Options tab of the Configuration Workbench. EnterpriseTrack must be in the Install Mode for this option to be displayed.

## Administrative Reports

Three new reports are added to the Administration module:

- Usage Statistics Report
- Permissions Report
- Last Login Report

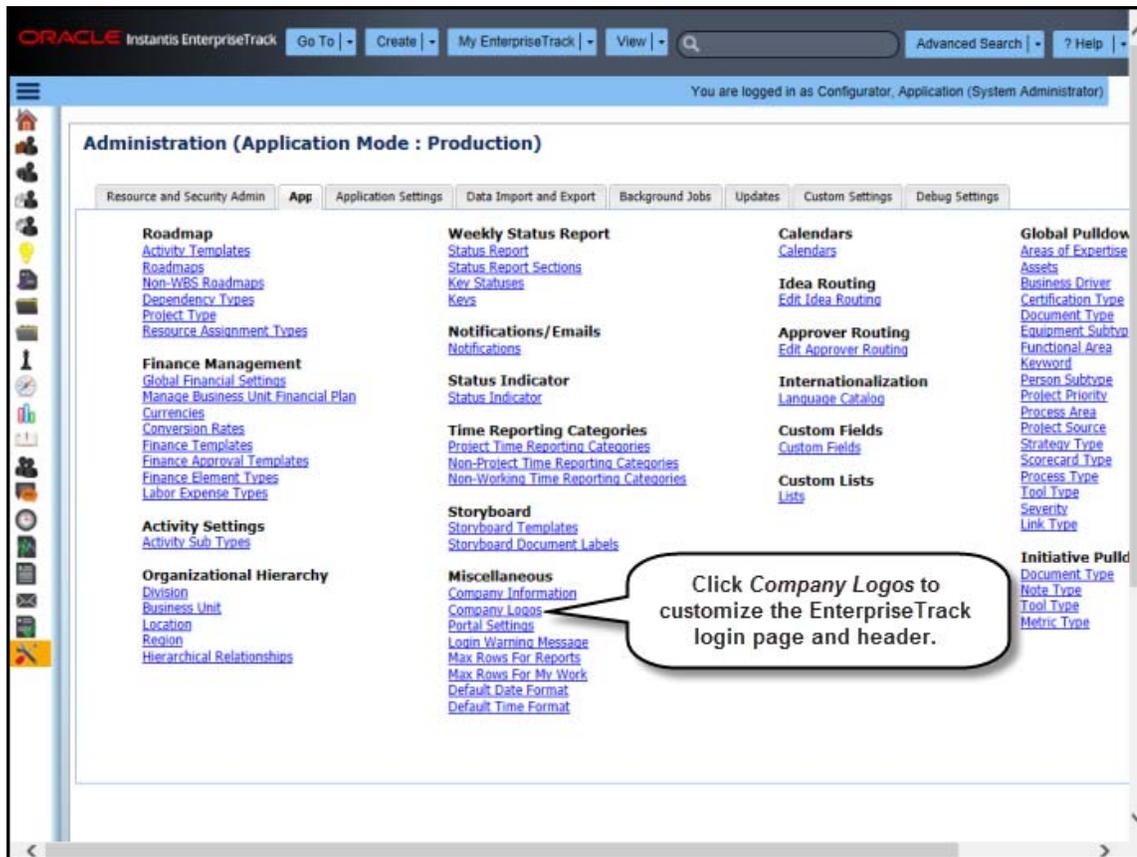


**Benefit:** Improved system administration.

**Location:** On the Go To menu on the Top Navigation bar, click Administration. On the Administration console, click the Resource and Security Admin tab.

### Company Logos

You can now customize EnterpriseTrack by adding your company logo to the Login page and the header.

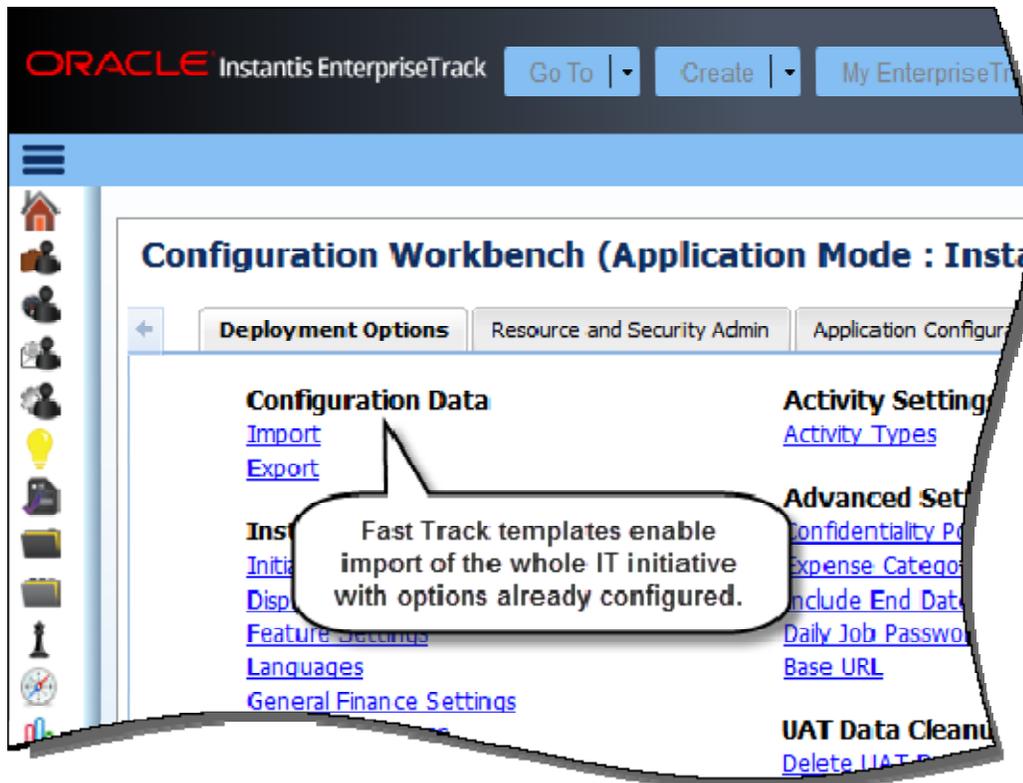


**Location:** On the Go To menu on the Top Navigation bar, click Administration. On the Administration console, click Company Logos.

### Fast Track Templates

EnterpriseTrack 8.7 provides Fast Track templates for importing the IT initiative in new EnterpriseTrack deployments. Two templates are offered:

- **Basic:** Intended for customers who are willing to adopt Instantis recommendations. Provides out-of-the-box pre-configuration of all options with best business practices incorporated.
- **Advanced:** Intended for customers who need to tailor the EnterpriseTrack deployment to their specific organization needs. Requires in-depth knowledge of EnterpriseTrack and of their organization's business practices.



#### Benefits:

- Saves time in configuring a new EnterpriseTrack deployment
- Reduces the need for consulting services

**Location:** In the Configuration Data section on the Deployment Options tab of the Configuration Workbench, click Import.

### Improved Data Import

A data import process can become locked when, during data validation, the user navigates to another screen or closes the window, the session times out, or the connection fails. A locked process does not complete and prevents future data imports, requiring support to log in through SiteWand to unlock the process. In EnterpriseTrack 8.7, the administrator who initiated an import process can unlock it when it is locked. A new option, Unlock Import Data Process, displays on the administrator's Data Import and Export tab when a data import is not complete. The option displays additional information, such as the originator of the import process and the timestamp when the import started. The Instantis\_SA administrator can unlock the process for any administrator.

### Technical Enhancements

**Integration APIs:** EnterpriseTrack 8.7 employs new and updated project integration and timesheet APIs for better integration with ERP and other applications. The Create, Read, Update, and Delete (CRUD) project API includes support for 100-plus project header fields.

**Internationalization:** EnterpriseTrack 8.7 supports MS Office, including Excel and PowerPoint, in all supported languages. An updated MS Project client plug-in is available for all supported languages.

**Support for IE 10 and IE 11:** EnterpriseTrack 8.7 supports Microsoft Internet Explorer 10 and Internet Explorer 11. Windows 8 and Windows 8.1 are also supported.

**Deprecated:** The following version is deprecated in EnterpriseTrack 8.7 (still supported in this release but scheduled for support to end in the near future): IE 8

**Not Supported:** The following components and versions are not supported in EnterpriseTrack 8.7:

- MS SQL Server Database
- MS Office 2003
- IE 7
- Windows XP