ORACLE®

PRIMAVERA

New Features in Instantis EnterpriseTrack 8.7

March 2014

COPYRIGHT & TRADEMARKS

CONTENTS

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)

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.

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

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.

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.
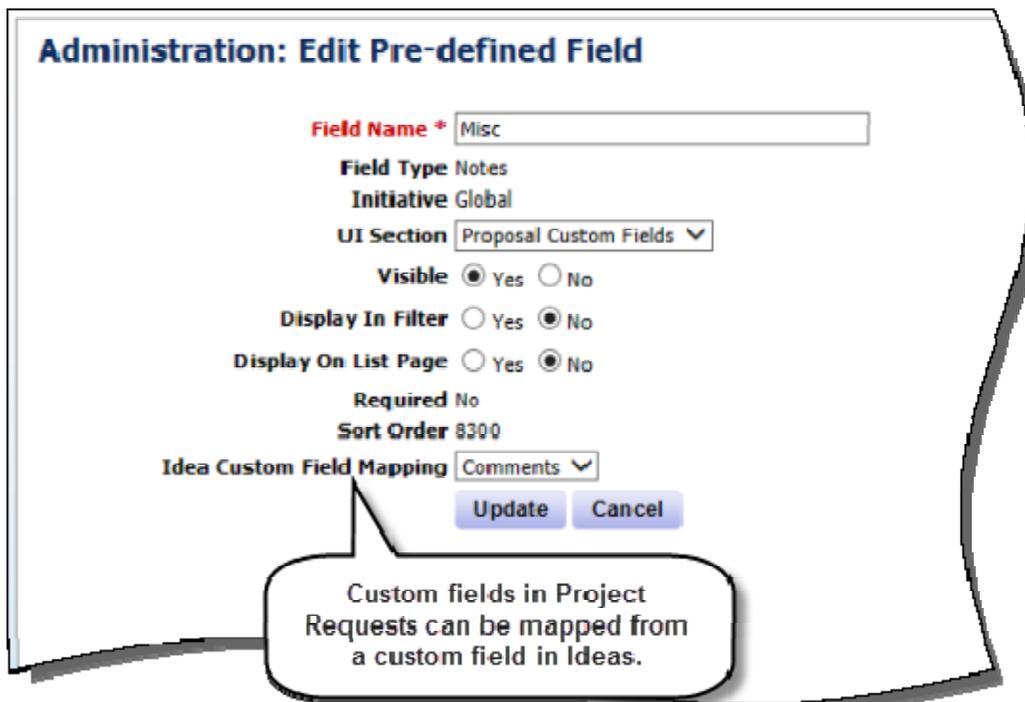
Benefits:

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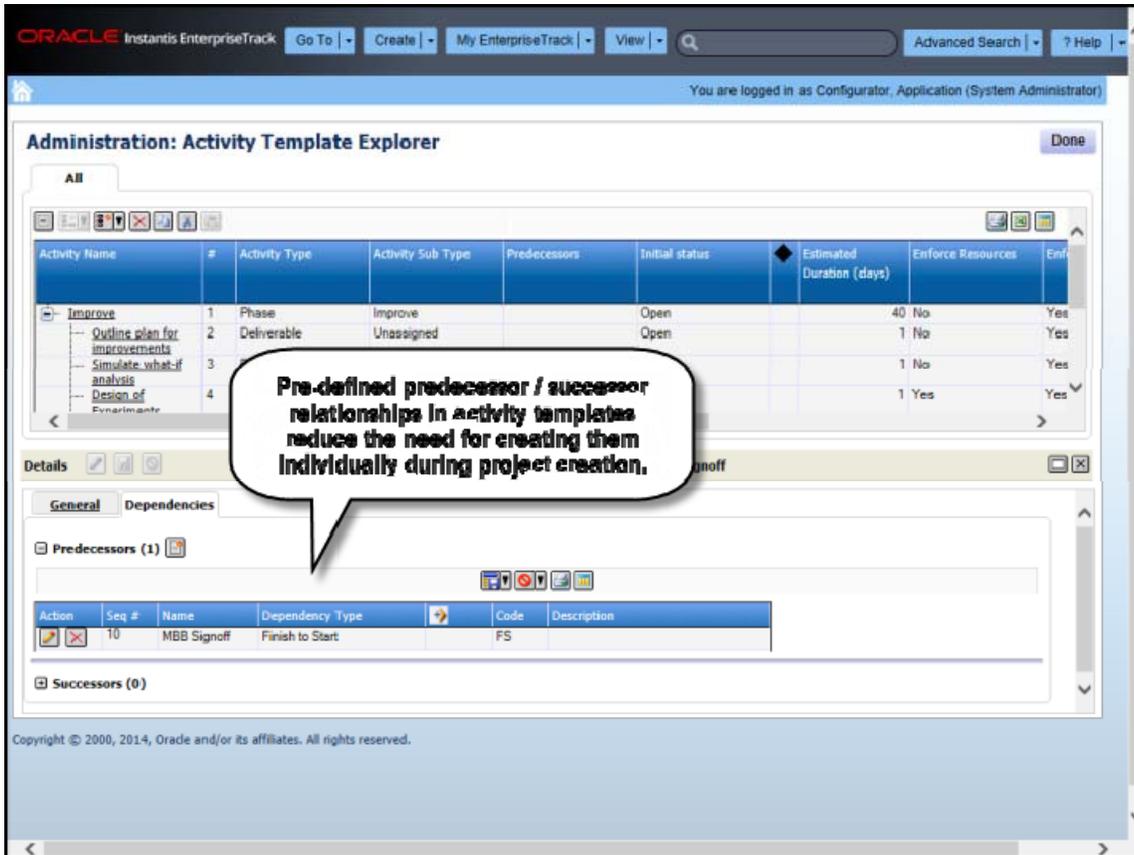
Location: On the Go To menu on the Top Navigation bar, click Administration. On the Application Configuration tab, click Activity Templates.

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.
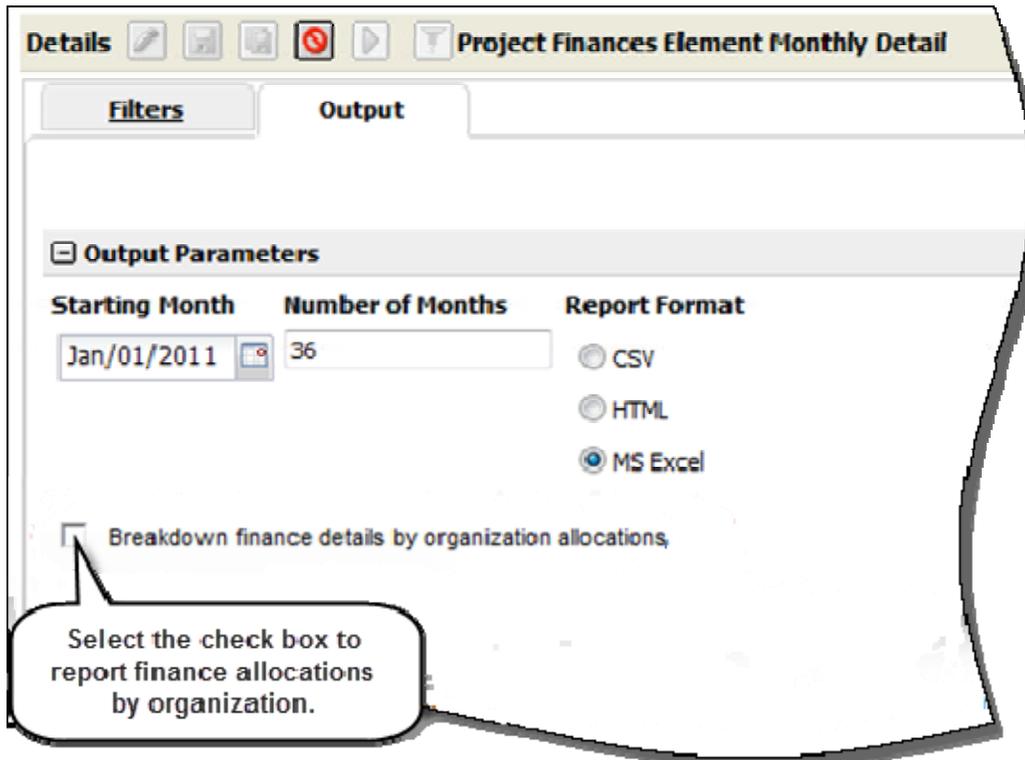
Benefit: Ability to perform financial data analysis by organization

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.
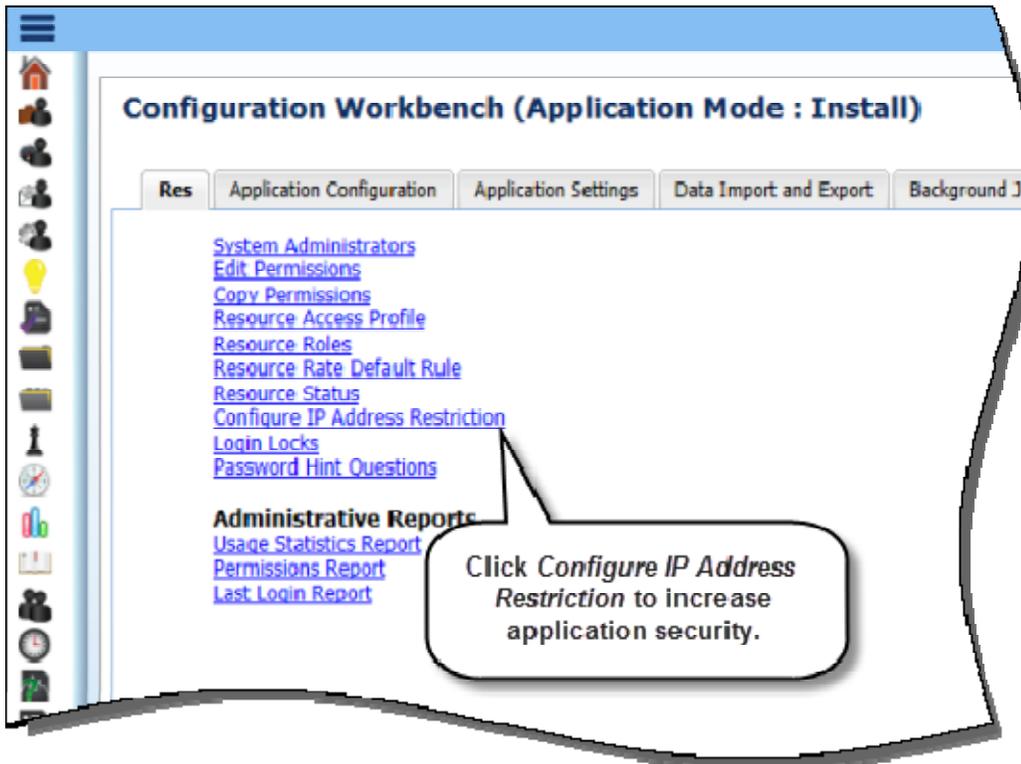
Benefits:

- 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.
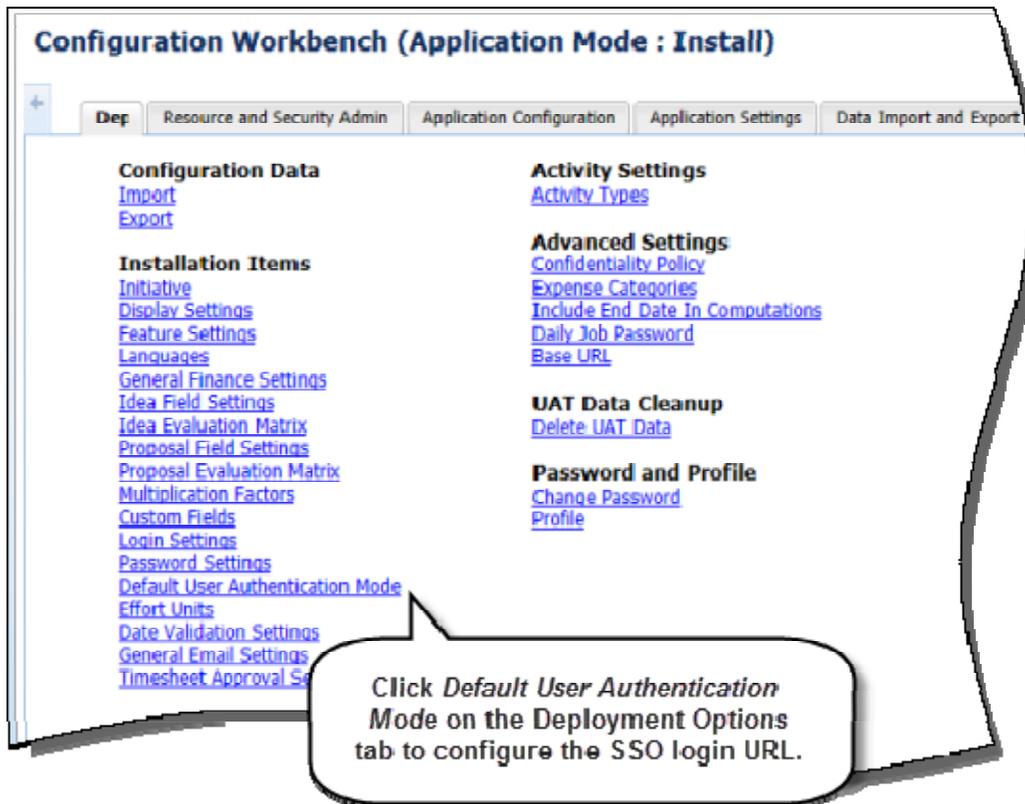
Benefit: Improved application security.

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
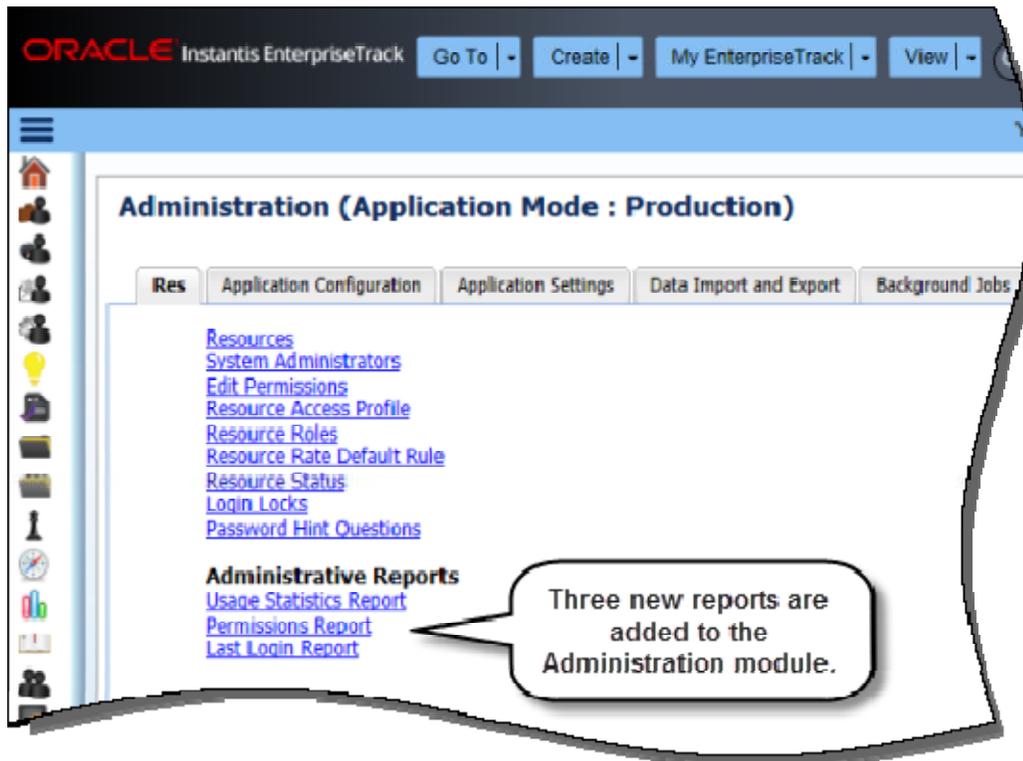
Benefit: Improved system administration.

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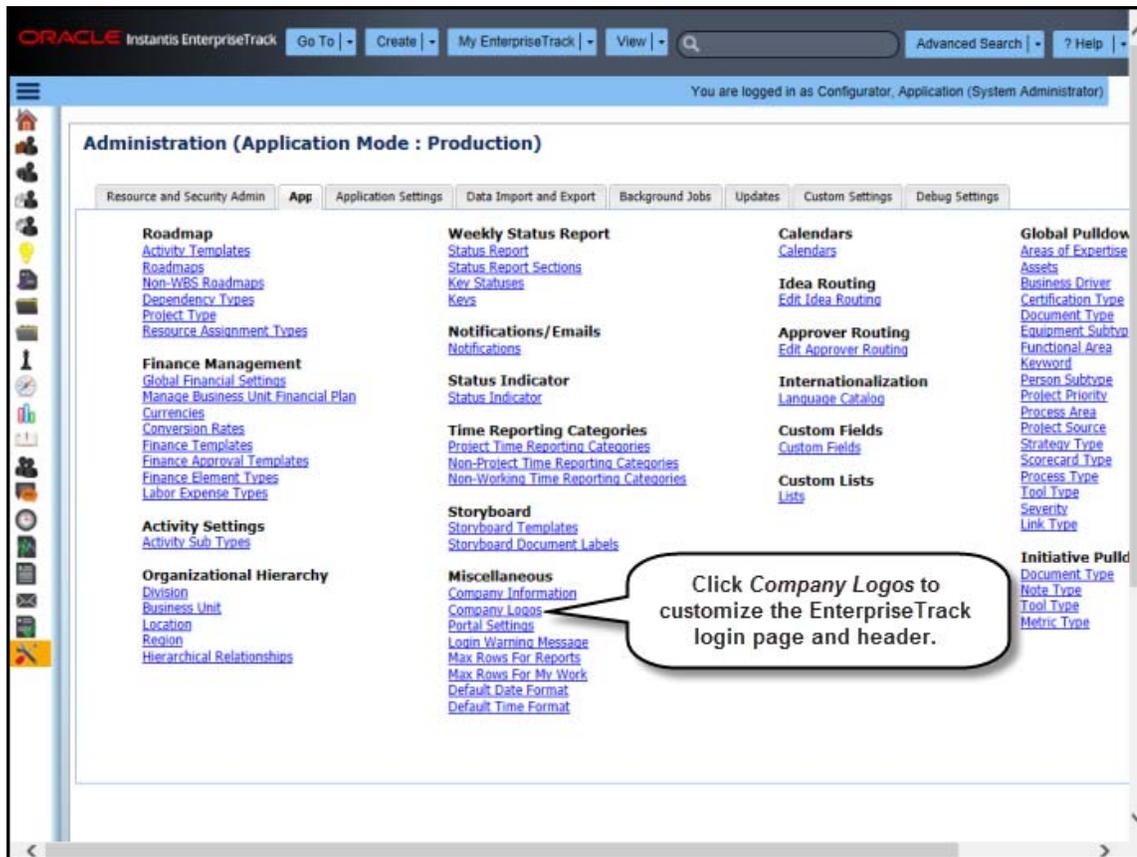
Location: On the Go To menu on the Top Navigation bar, click Administration. On the Administration console, click Company Logos.

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.
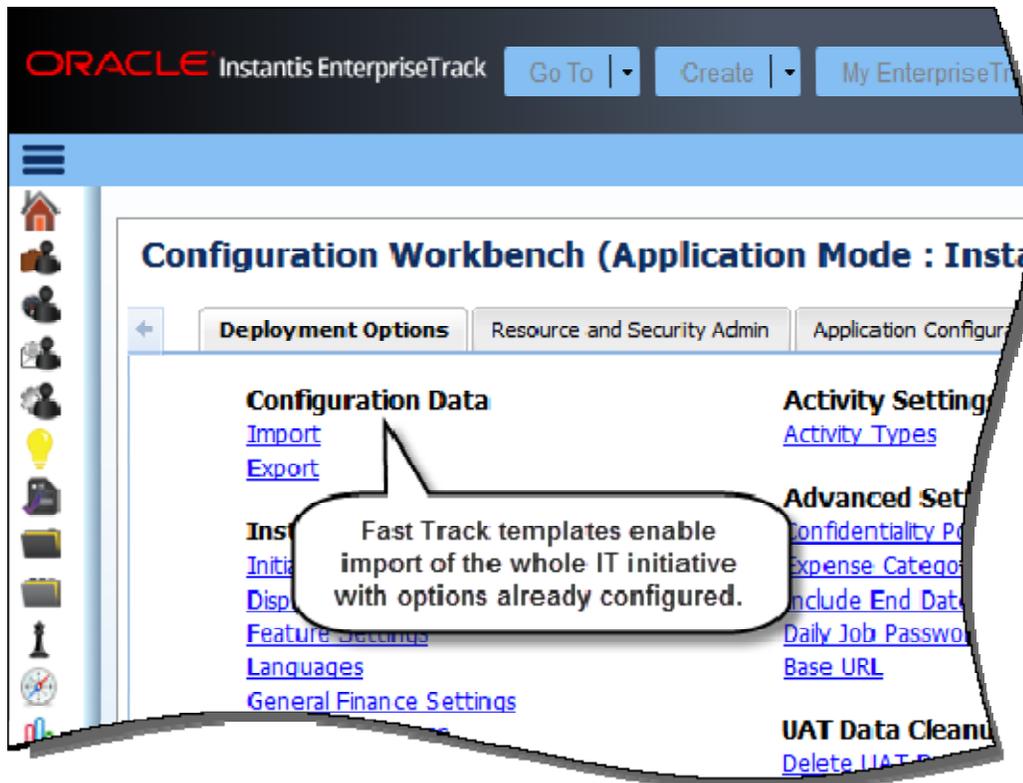
Benefits:

- 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