# New Features in Instantis EnterpriseTrack 15.1

# COPYRIGHT & TRADEMARKS

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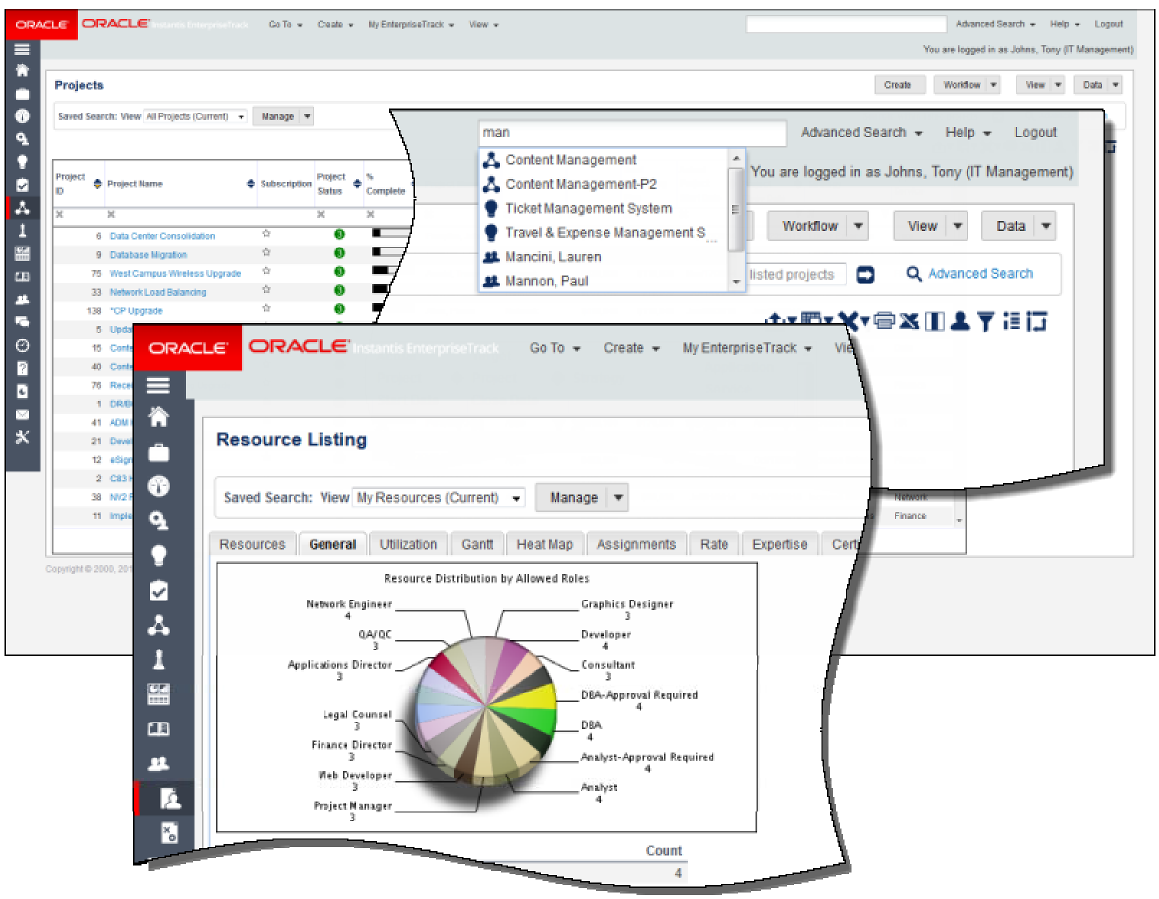
# New Features in Instantis EnterpriseTrack 15.1

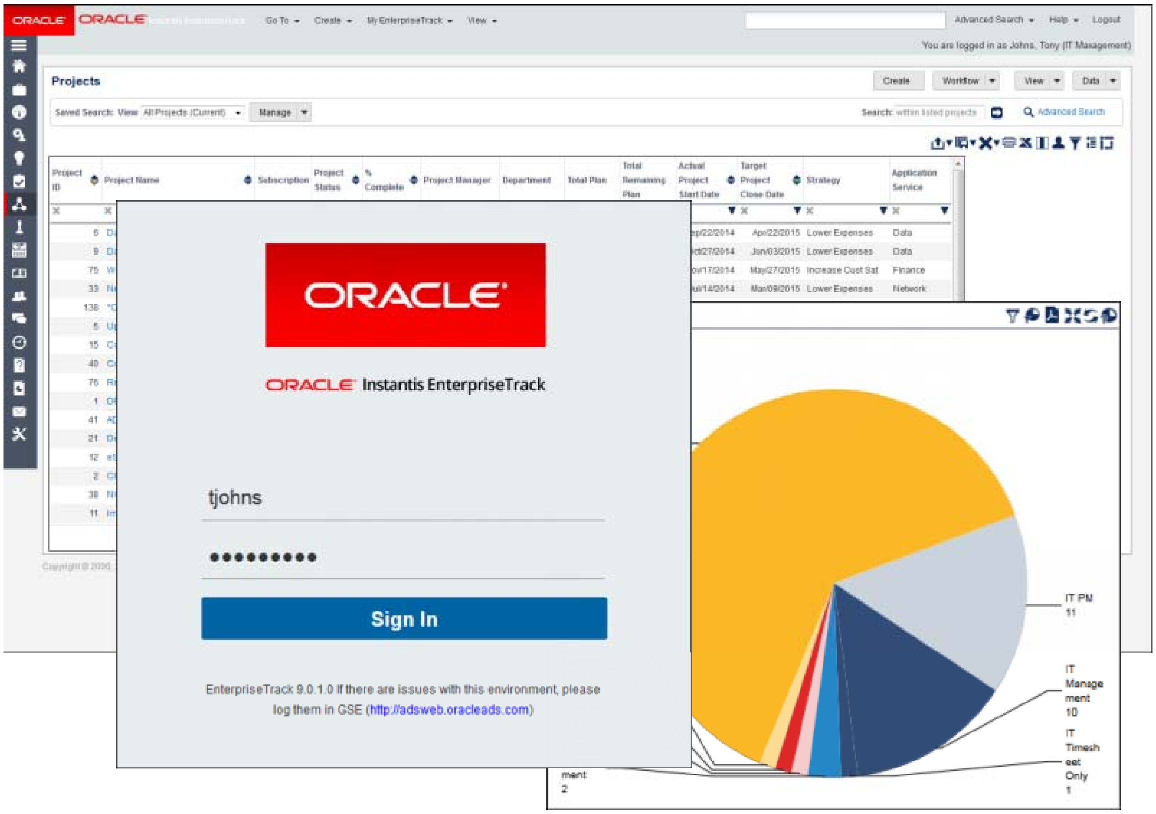
Key enhancements include:

- Timesheet improvements
- Resource creation and management improvements
- Ideation and Idea Portal improvements
- Redesigned Create Project Request page
- More settings to enable/disable in Reconfigure mode
- Calculation support for custom fields
- Editable notifications
- Expanded context sensitivity
- Configuration Workbench improvements
- Multiple LDAP support



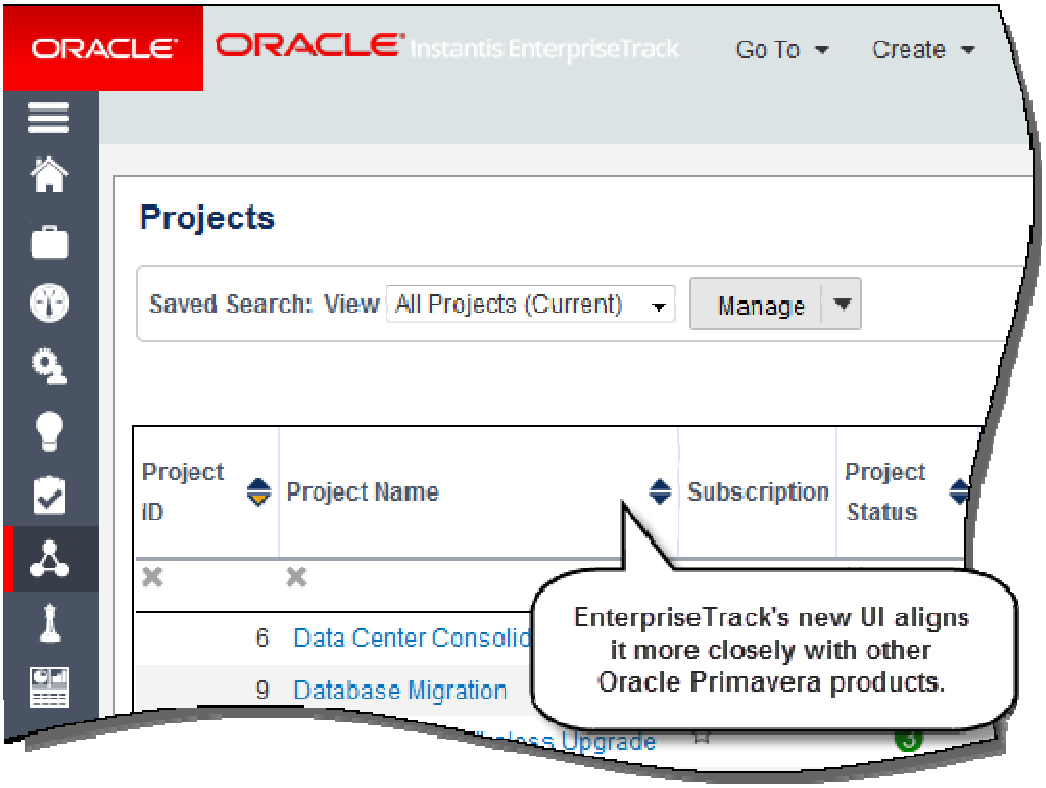
# UI and Mobile

Instantis EnterpriseTrack 15.1 provides an improved user interface with a new login page and new colors and icons to align the application more closely with other Oracle Primavera products. The mobile application is also updated with new SVG text and graphics.



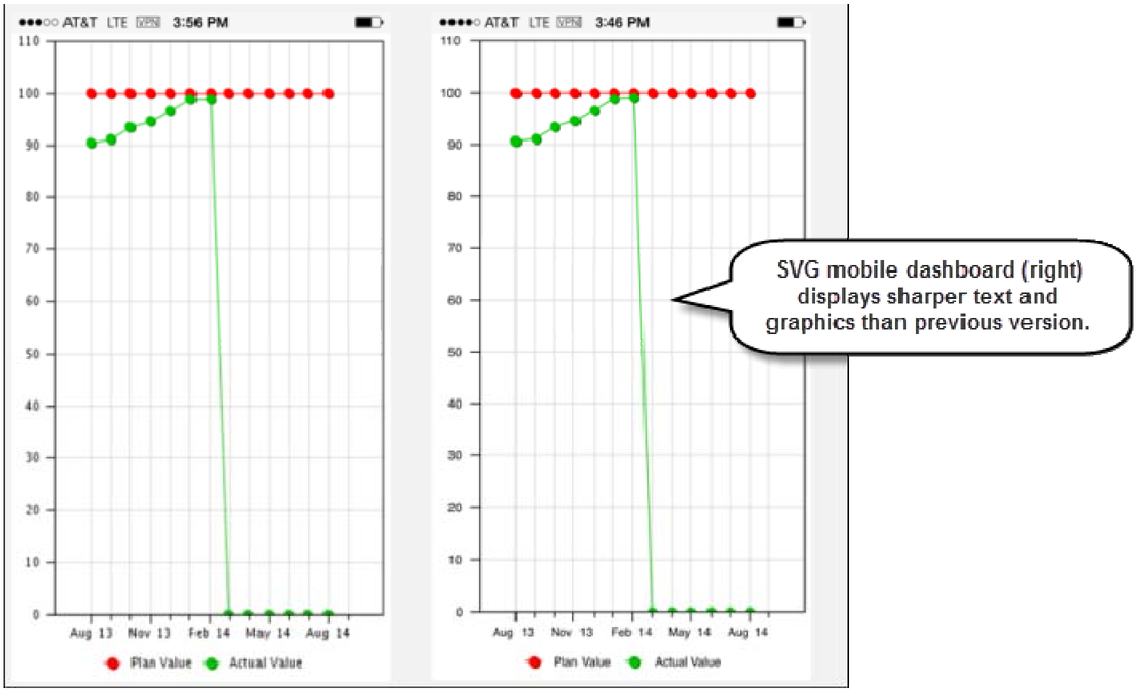
## User Interface Enhancements

Instantis EnterpriseTrack 15.1 provides a new Login page, new header colors, and new Left Navigation icons to align the application more closely with other Oracle Primavera products.



## Mobile Enhancements

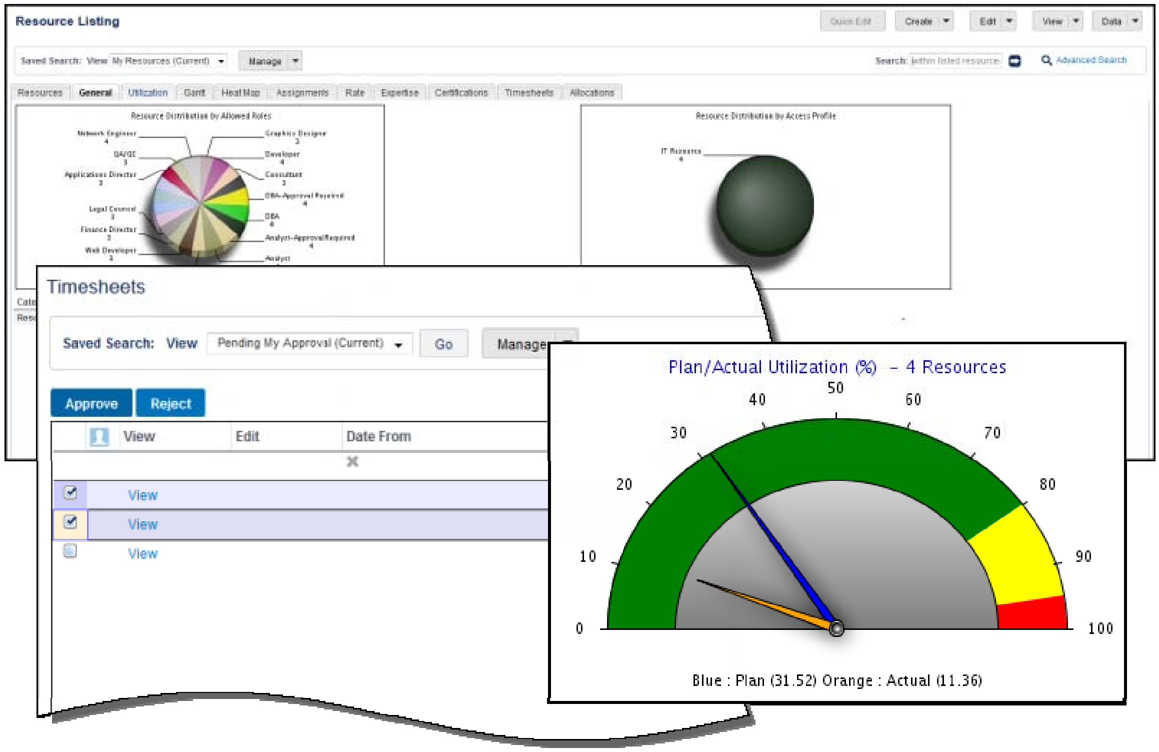
Dashboards on the EnterpriseTrack mobile app are now generated using Scalable Vector Graphics (SVG) and are restyled for sharper display and increased clarity. Also, depending on your implementation, you can use your SSO credentials to log in to the mobile app. The 15.1 mobile app supports EnterpriseTrack 15.1 and 9.0.




**To access this feature:** The Instantis EnterpriseTrack 15.1 mobile applications are available for download from the Google Play (Android) or Apple App (iPhone) store.

# PPM Features

EnterpriseTrack 15.1 offers new project portfolio management features to enhance resource planning and timesheet functionality.



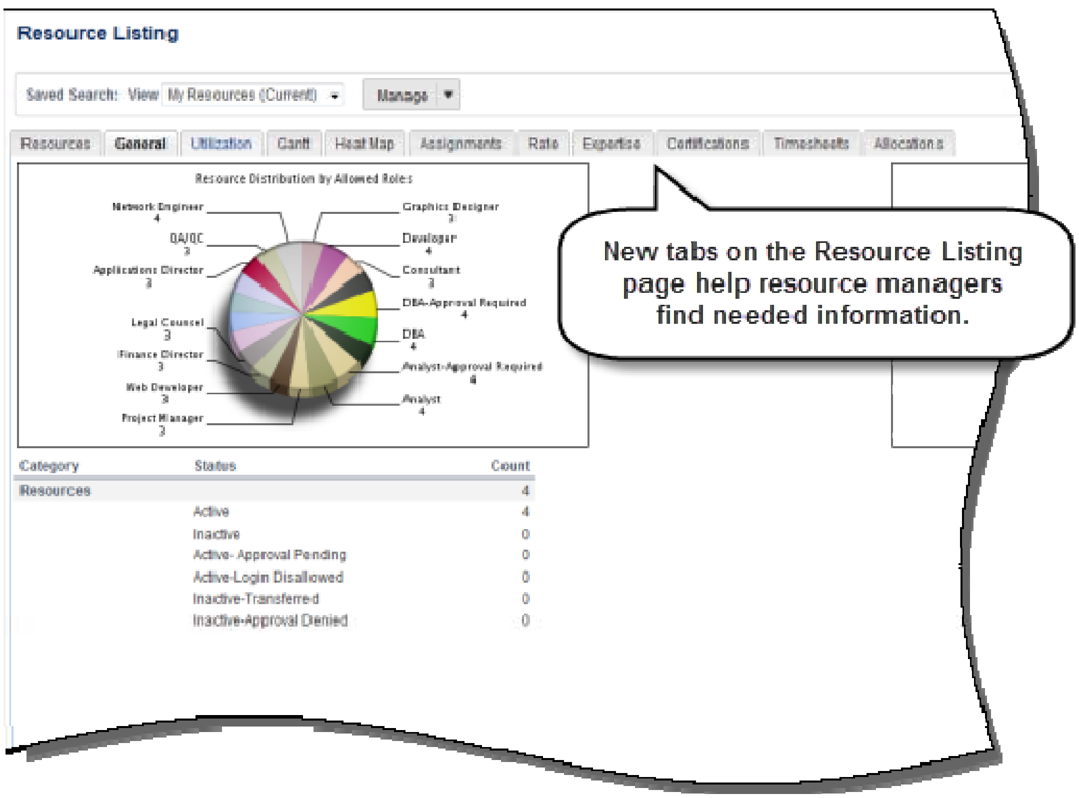
## Resource Management

Instantis EnterpriseTrack 15.1 provides a number of enhancements to facilitate resource management:

- **Add New Resource page:** The page has been redesigned and simplified with the addition of tabs to organize resource information. The Basics tab includes sections for Resource Details, Organization, Time Reporting and Rates, and Roles. All required fields are confined to the Basics tab. The Additional Information tab includes sections for Contact Information, Additional Resource Details, Preferences, and Areas of Expertise. The Resource Custom Fields tab contains custom fields configured by an administrator.
- **Resource Listing page:** The page has been resdesigned tp include a predefined search for My Resources and tabs to enable resource managers to view detailed information about their resources, including timesheets and allocations requiring approval.

Other resource management enhancements include:

- Drilldown functionality added to  resource-related dashboard charts.
- New Resource Allocation report added to the predefined standard reports.
- User defined fields added to Resource and Update Resource data import/export.

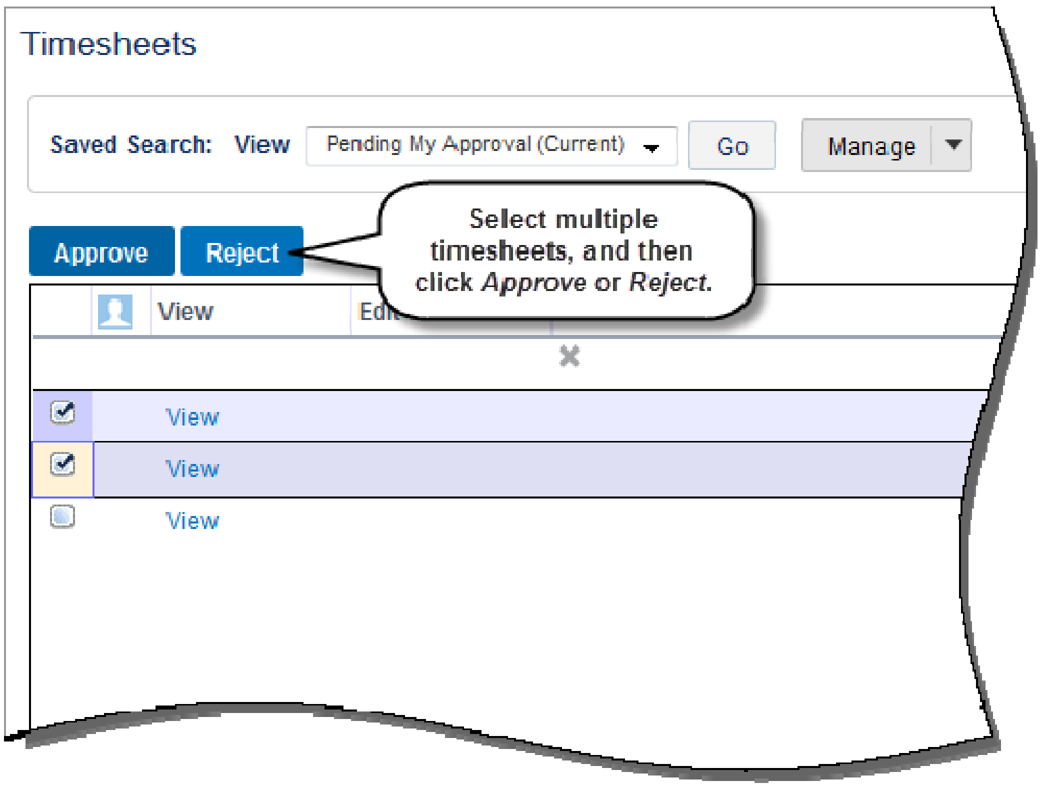



**To access this feature:** On the Go To menu on the Top Navigation bar, click Resources, Listing.

## Timesheet Enhancements

Instantis EnterpriseTrack 15.1 provides the following Timesheets enhancements:

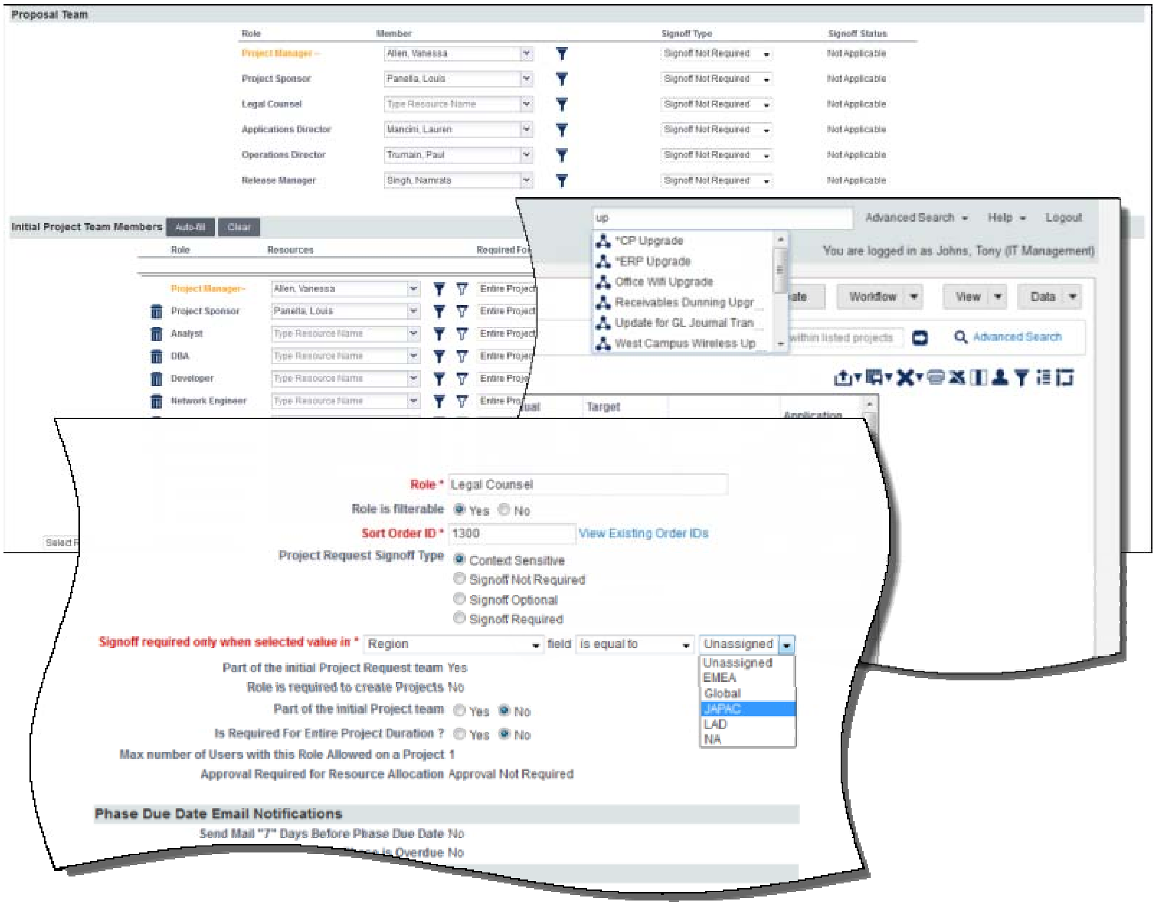
- **Timesheets listing page:** Now incorporates Advanced Search capability, enabling you to create, save, and manage custom searches. Saved searches retain their sort order. In addition, the page enables resource managers to approve or reject multiple timesheets simultaneously.
- **Create Timesheets page:** Updated with new column choices (Project ID, Project Start Date) and the ability to sort the page by clicking a column header (Time Reporting Category, Project ID, Project Start Date). You can also save timesheet entries without closing the page.
- **Missing Timesheet report:** Administrators can run the report to list users who have not submitted timesheets in a specfied time period.




**To access this feature:** On the Go To menu on the Top Navigation bar, click Timesheets, Listing.

# Customer Success

EnterpriseTrack 15.1 provides multiple new features that respond to customer requests for increased usability.



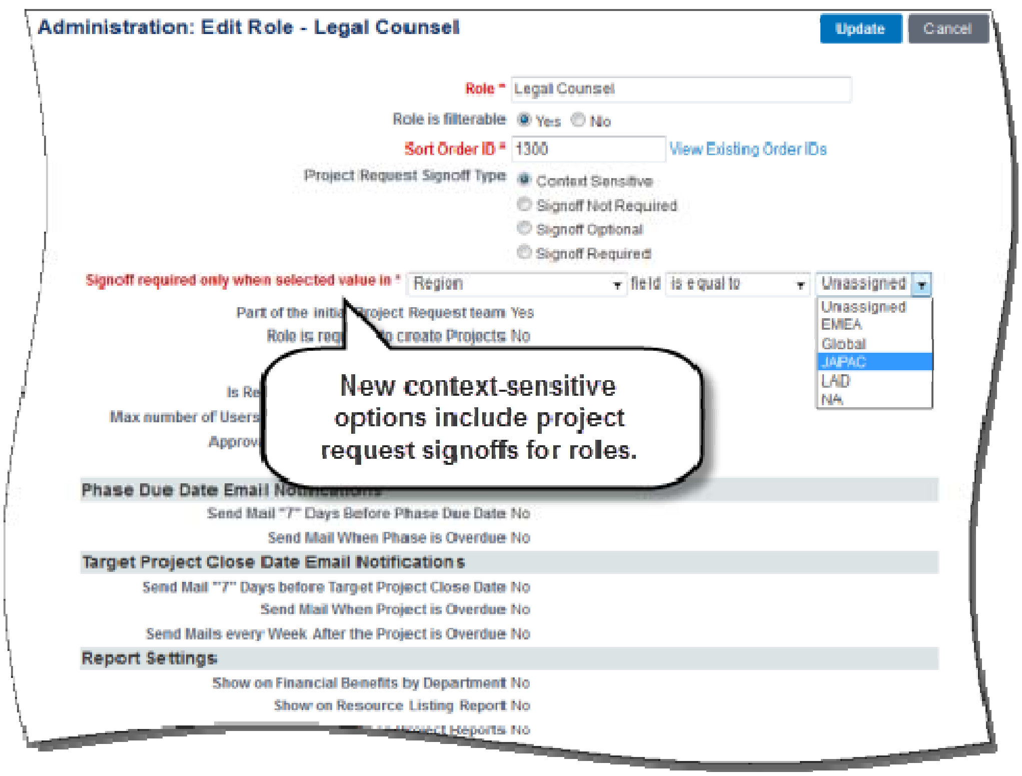
## Expansion of Context-Sensitive Options

Context sensitivity was added to EnterpriseTrack's custom field functionality in the 8.7 release. With 15.1, context sensitive functionality is expanded to allow the driver or controlling field to be any of the following types:

- List
- Multi-list
- Boolean
- Decimal
- Integer
- Currency
- Date

The Initiative field can be the driver for context-sensitive Idea custom fields.

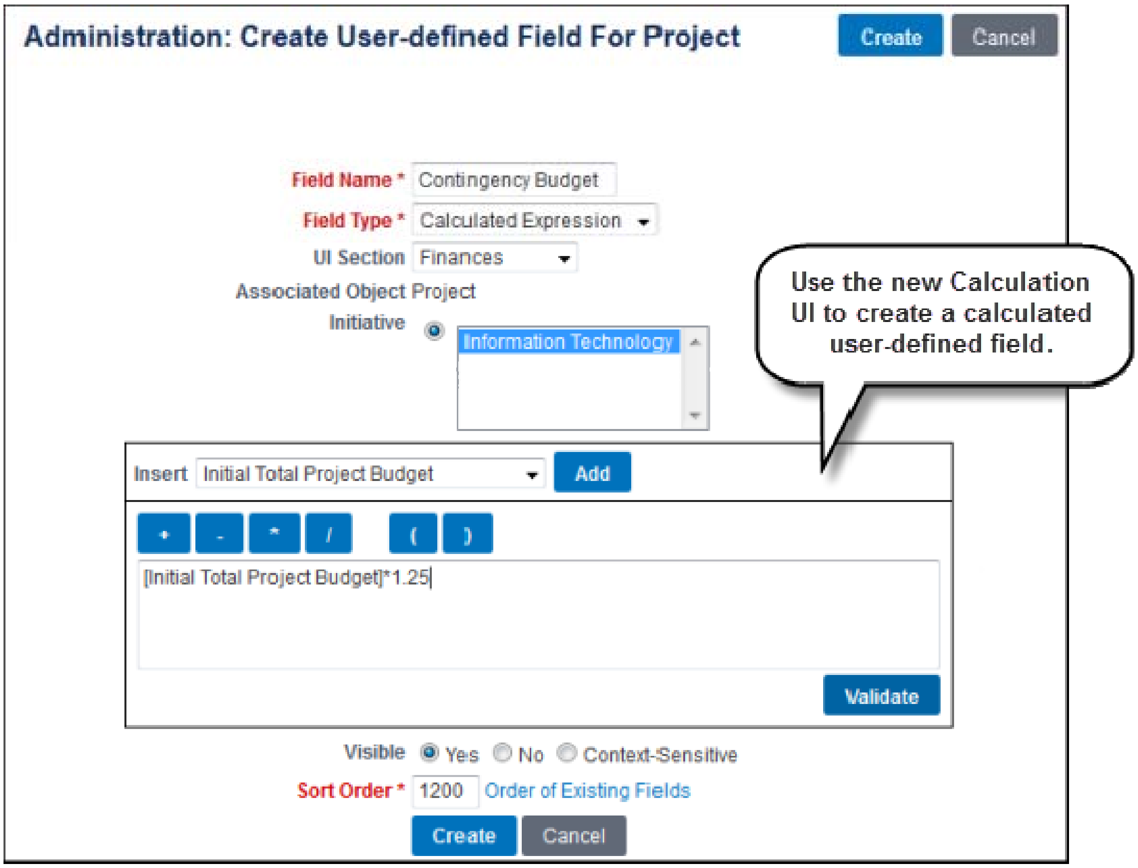
Context-sensitivity is also extended to signoffs for roles. Administrators can specify a condition that determines when proposal signoff is required for a role. For example, an administrator might specify that signoff for the DBA role is required only when the value in the Region field is South America.




**To access this feature:** On the Go To menu on the Top Navigation bar, click Administration. Click the Custom Fields link on the Application Configuration tab to configure a new custom field. Click Resource Roles on the Resource & Security Admin tab to edit an existing role or to create a new one.

## Calculation Support for Custom Fields

A new custom field type enables administrators to create user-defined custom fields that display a value based on a mathematical formula. Select Calculated Expression in the Field Type field and then construct a mathematical formula in the Calculation UI using the controls provided.




**To access this feature:** On the Application Configuration tab of the Administration console, click the Custom Fields link.

## Idea and Proposal Simplification

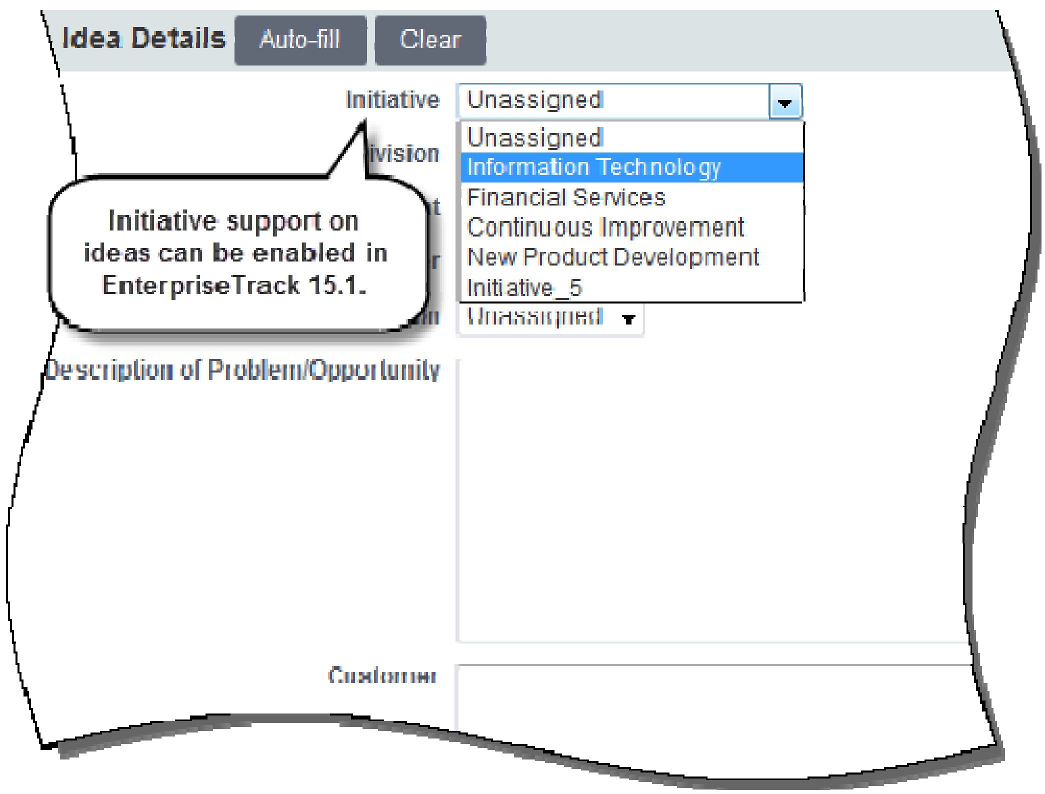
Both the Create a New Idea page and the Create New Project Request page are enhanced for improved usability.

Administrators can now enable initiative support on ideas during system installation or reconfiguration. Although ideas are global entities and not initiative-specific, some users may already know what initiative an idea belongs to and want to enter specific details that may flow into project requests. As a result of enabled initiative support, initiatives are displayed when viewing, creating, or editing ideas as well as on idea listing reports, advanced search for ideas, and on the data import template for ideas. The initiative can also be chosen as the driver when creating context-sensitive custom fields for ideas. The default value for the Initiative field on ideas is Unassigned.

Administrators can now also turn off display of Organization Hierarchy options on the Create a New Idea page during system installation or reconfiguration.

The Create New Project Request page has been improved by reducing and consolidating the tabs. The Confidentiality tab is renamed Settings, and the Other tab is renamed Documents. In addition, alignment functionality is updated on the Basics page, and users can now copy the Proposal Team to the Initial Project Team without having to reselect the same resources.

Administrators can rename the Proposal Team during installation or reconfiguration and can also choose whether to allow users to modify the default calendar when project requests or projects are created or edited.



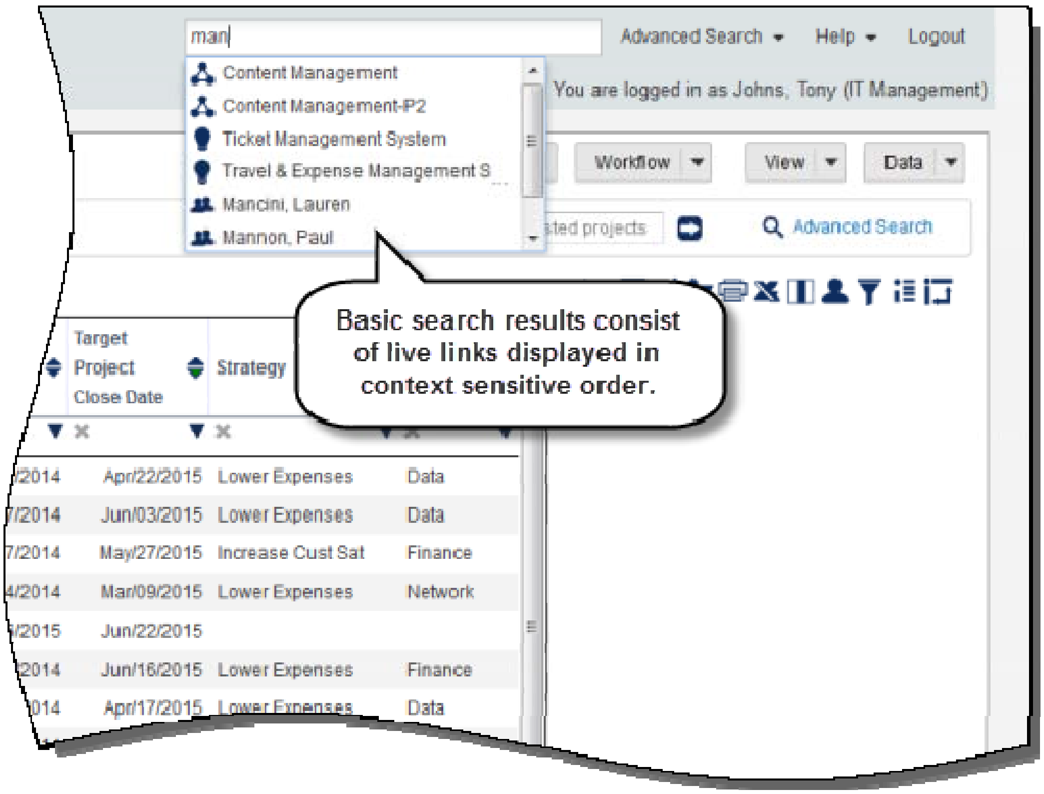

**To access this feature:** Initiative support on ideas must be enabled from the Deployment Options tab during system installation or reconfiguration. Once enabled, the Initiative field is displayed on idea-related items throughout the application as described above. The proposal enhancements can be accessed by clicking Create on the Project Requests listing page.

## Search and Listing Page Enhancements

Basic search functionality has been enhanced on all listing pages. Just begin typing in the Basic Search field on the Top Navigation bar to find resources, ideas, and proposals in addition to projects. Search results consist of live links and their display order is context-sensitive, meaning that results pertaining to the currently displayed page appear first.

With the proper permissions, you can now share a saved Advanced Search with other users.

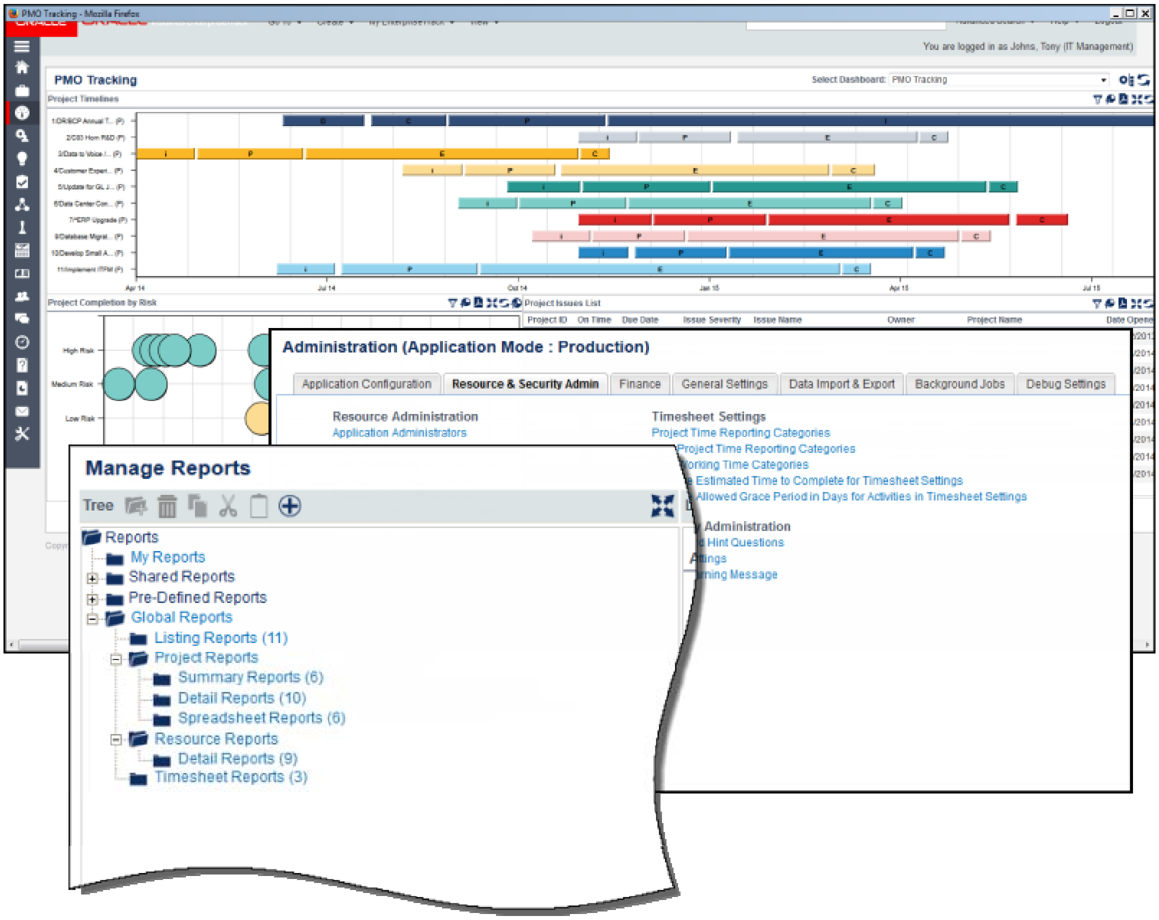
Listing page enhancements include new default listing columns and a reorganized column selector dialog that improves usability. In addition, a new Load My Settings icon enables you to load user- or profile-specific view settings.




**To access this feature:** Basic search can be accessed via the Top Navigation bar throughout the application. Listing page enhancements are available on the Ideas, Project Requests, Projects, and Resource Listing pages.

# Other Feature Enhancements

EnterpriseTrack 15.1 incorporates approximately 60 customer enhancement requests for better performance and ease of use.



# Other Feature Enhancements

**Usability**

**Dashboards Module:** Dashboards are now rendered using Scalable Vector Graphics (SVG) for better sharpness and clarity of both text and visual elements. Also, the styling, fonts, and color are improved to match other Primavera products.

The following four new dashboards are added:

- Idea Count by Status
- Proposal Count by Status
- Idea Count by Org Hierarchy
- Proposal Count by Org Hierarchy

In addition, drill-down functionality is added to the following dashboard components:

- Resource Certifications by Org
- Resource Certifications by Period
- Resource Count by Access Profile

The Resource Count by Access Profile dashboard component can now be filtered by initiative.

The following dashboard components were renamed:

- Plan/Actual Effort renamed to Project Effort
- Plan/Actual Effort by Project Type renamed to Project Effort by Project Type
- Plan/Actual Effort by Roadmap renamed to Project Effort by Schedule
- Plan/Actual Effort by Organization renamed to Project Effort by Organization
- Plan/Actual Effort by Alignment renamed to Project Effort by Alignment
- Plan/Actual Effort by Classification renamed to Project Effort by Classification

**Reports Module:** Administrators can now turn off specific scheduled standard reports to improve performance. Users can view the Schedule and Email tab in the Details pane of the Manage Reports page to determine whether a particular report has been disabled by an administrator.

The following new reports are added to the pre-defined standard reports:

- Resource Allocation Report: Displays the current resource allocations across projects and proposals.
- Timesheet Weekly Status Report: Displays weekly totals, timesheet approval status, approvers, and approval dates.
- Status Listing Report: Lists status report content for all projects and status report periods as defined in the filters.

Role filters are added to the Timesheet by Project and Timesheet by Resource reports. In addition, the ability to display roles is added to the following reports:

- Proposal Listing
- Project Listing
- Project Finances Element Monthly Detail
- Project Finances Group Aggregate
- Project Finances Element Aggregate

The following ad-hoc reports can now be filtered by one or more project roles:

- Team Member Listing Report
- Proposal Team Member Listing Report

**Alignment Link Columns and Filters:** The Projects listing page now provides links to alignments. You can also filter ideas, proposals, and projects by alignment.

**Non-WBS Improvements:** EnterpriseTrack now provides the ability to display non-WBS activities when generating project storyboards. In addition, options are added to link non-WBS activities to other non-WBS or schedule activities and to customize the layout of non-WBS pages.

## Configuration Support

**Ability to View/Edit Notification Text:** Instantis EnterpriseTrack 15.1 enables administrators to preview and customize email notification text and subject headings. In addition, the following notifications are added:

- New Resource Calendar Updated
- New Activity Overdue
- New Activity Due Warning

**Options to Change Features in Reconfigure Mode:** In an effort to help customers respond to increasingly fluid business processes, EnterpriseTrack 15.1 expands the number of features that can be enabled/disabled in Reconfigure mode using the Deployment Options tab. For example, administrators can now change timesheet approval settings in Reconfigure mode. A message is displayed to warn how this action affects timesheet approvals that are already submitted but have not yet been approved or rejected.

**New Admin Reports:** Two new admin reports -- Scheduled Report by Resource Report and Confidential Project Count by Resource Report -- are added. These reports can be accessed on the Resource & Security Admin tab of the Administration console.

**Idea Portal Customization:** Administrators can customize the Idea Portal Welcome page by adding a logo and by modifying the banner and message.

**Enable Multiple LDAP URLs:** EnterpriseTrack now supports multiple LDAP providers at the global level.

**User-Based Confidentiality:** A new option exists during system installation to set confidentiality based on user roles. When implemented, users can view projects only if their role on the project matches a role selected in their Resource Details.

**New Feature Settings:** Two new feature settings are added:

- Enable Org for Idea
- Enable Initiative Selection on Ideas

**Project Settings:** Two duration-based options are added for calculating activity percent complete:

- Actual vs Planned Duration for Immediate Children
- Actual vs Planned Duration for All Children

**Configuration Workbench (CWB) Console:** Visibility of custom fields is improved in the Confguration Workbench and many links are relabeled to improve usability.

**Company Logo:** The allowed logo size is changed.

## Integration

**New APIs:** Instantis EnterpriseTrack 15.1 provides new CRUD (Create, Read, Update, Delete) APIs for:

- Resource
- Resource Rate
- Team Member
- WBS Activity

- Non-WBS Activity (issues, risks, etc.)
- Assignment

To offer more integration functionality, EnterpriseTrack is shifting away from single action APIs (GetActivityAssignments, UpdateResourceEffort) in favor of CRUD APIs, which expose objects in the EnterpriseTrack data structure (project, activity, resource, etc.) and enable the following operations against them:

- **C**reate: Create new objects.
- **R**ead: View existing object information.
- **U**pdate: Edit existing object information.
- **D**elete: Delete existing objects.