ORACLE®

INSTANTIS

EnterpriseTrack

Dashboards and Reports User's Guide

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LEGAL NOTICES

Oracle Instantis EnterpriseTrack Dashboards and Reports User's Guide

Customers that licensed EnterpriseTrack Version 8.0.5 and earlier (including Standard and PMO Editions) and are renewing their existing contracts without modification are only entitled to the same licenses and modules as agreed in the original contract and associated pricing sheets.

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CHAPTER 1

ABOUT THIS MANUAL

The *Dashboard and Reports User Guide* provides an overview of the Oracle Instantis EnterpriseTrack dashboard and reports module. It shows you how to create and modify your dashboard, and how to generate and modify standard, Ad-hoc, and user-defined reports.

DOCUMENT CONVENTIONS

The following conventions are used in this manual to convey instructions and information:

- The description of a menu item and its sub-items is described in this document **as (Page Menu) View → Toolbar → Display Print-Data Toolbar**, where you should click on the **View** Page Menu, then find the Toolbar sub-item and then click on the **Display Print-Data Toolbar** sub-item.
- Screen names and field names are in bold text.
- The actions you need to take on each screen are in bold text.

ADDITIONAL RESOURCES

- User Guide
- Administrator's Guide
- Quick Reference Guide
- MS Project Integration Guide
- Integration API Guide
- Installation Guide

GETTING AROUND IN ENTERPRISETRACK

USERNAME AND PASSWORD

To log into your system, enter your username in and password in the appropriate fields and press the Login button.

NAVIGATING WITHIN ENTERPRISETRACK

Navigating within EnterpriseTrack is easy using the various menu options. The menu system consists of an Application Level Menu, Module Level Menu, Page Level menu and an Item Level Menu. Common functions are grouped together throughout the application.

- Application Level Menu

  Appears in the Top Navigation Bar and provides access to all major modules and components of EnterpriseTrack.

- Module Level Menu

  This menu appears on the left side of the Top Navigation Bar when you are in a specific module of the application, specifically within a particular Idea, Proposal or Project. It provides access to commonly used functions within the module.

- Page Level Menu

  Appears within each page of a module and provides access to functions that are relevant only to that page.

- Item Level Menu

  This menu appears within each page. It allows you to perform actions specific to that item.

USING THE TOP NAVIGATION BAR

When you log into the system, you will see the Top Navigation bar. The Top Navigation Bar contains the Application Level Menu, and depending on the context, a Module Level Menu.

LEFT NAVIGATION BAR

To display the Left Navigation Bar, from the Top Navigation Bar select the **View** menu and choose **Display Left Navigation**. Select if you want to display icons only or icons and text.

NAVIGATING TO THE DASHBOARD AND REPORTS MODULE

- To navigate to the dashboards, from the Top Navigation bar select **Go To → Dashboards → View**.
- To navigate to the Reports section, from the Top Navigation bar select **Go To → Reports → View**.

CHAPTER 2

DASHBOARDS

EnterpriseTrack Dashboards are designed to provide graphical displays of proposal, project, resource, finance information along various X axes like organization, time, classification fields, strategy nodes etc. It is highly flexible and enables you to create your own dashboards, share between selected users, or globally to all dashboard viewers.

EnterpriseTrack comes with a variety of pre-made dashboard widgets (components) that you can use to build a specific dashboard view that meets the different needs of your business. All dashboard widgets come with pre-built filters.

TERMINOLOGY

The following terminology is used in throughout this manual.

- Dashboard component – A single graph.
- Canvas or One Dashboard – A set of 1 or more graphs on a single screen. You can resize layouts in 2x1, 2x2, 3x3 or any other size you want.

VIEWING DASHBOARDS

To view dashboards, from the Top Navigation bar, select **Go To → Dashboards → View**.

You can select the type of Dashboard you want to view using the **Select Dashboards** pull-down menu on the top right corner of the screen.

SELECT DASHBOARDS

From the **Select Dashboard** pull down menu you can view the list of dashboards that are available to you. This list contains various sub-groupings with individual canvases under each grouping.

MY DASHBOARDS

My Dashboards displays the dashboards that you have created. For more information on creating a new dashboard, see Creating a New Dashboard.

SHARED DASHBOARDS

Shared Dashboards displays the dashboards that have been shared. You can copy and modify the shared dashboard. For more information on sharing dashboards, see *Sharing Dashboards*.

PRE-DEFINED DASHBOARDS

These dashboards are predefined in the system.

The **Executive Dashboard** displays four high level visual reports:

- Project Count by Status
- Average cycle time by executive
- Aggregate Month-by-Month Financial Savings for all projects
- Associated Active Members

Clicking on any of these graphs gives you a second level of detail. You can also filter the displayed data by Division and Year.

The **Project Dashboard** displays various charts and tables based on your project association.

- Project Timelines
- Primary Metrics
- Aggregate Month-by-Month Financial Savings for all projects
- Open Deliverables
- Open Tasks
- Open Issues

GLOBAL DASHBOARDS

These dashboards can be viewed by all dashboard users.

MANAGE DASHBOARDS

To manage dashboards click the **Manage** button. You can create, copy, paste, edit, and share dashboards. You can also set filters for each component in the dashboard. For more information, see Setting Component Filters.

DASHBOARD REFRESH

To refresh a dashboard, click on the **Refresh** button. The graph is recomputed using the latest data in the system. You can also update each component in the dashboard separately.

COMPONENTS IN THE DASHBOARD

A component is a single graph that shows information on project, proposal, resource, or finances etc. A dashboard can contain multiple components. The table below describes the icons that are displayed on the component bar.

Icons	Description
	Click to open the Inline Filter box.
	Click to set filters and display options for each component.
	Click to generate a PDF.
	Click to maximize or minimize the component screen.
	Click for a description of the component.

INLINE FILTER

Inline Filters provide instant access to some of the most commonly used filter fields. Inline Filters are simple to use. For more information, see *Using In-line Filters*.

FILTERS AND DISPLAY OPTIONS

Each component has filters, display options, and chart display options that you can set when you add components to your dashboard, or at the component level.

CHANGING DASHBOARD COMPONENT FILTERS

To change dashboard component filters, do the following:

1. From the top banner of the component, click the **Edit Filters and Display Options** button.
2. From the **Filters** tab, click the **Expand All** button to expand the filter categories. You can select the **Collapse All** button to collapse the list. The filter list is either expanded or collapsed based on the settings selected by your Administrator.

3. Make the necessary changes and click the **Apply** button to set these filters for the current run of the component, or click the **Save** button to save the filter settings for future use.

CHANGING DISPLAY OPTIONS

You can personalize the look the of your dashboard component by adding or modifying the header, footer, vertical axis title, horizontal axis title, left and right tics. You can also change the general display by changing the chart color, font, font color, size, or the background color.

To edit the general display options associated with a dashboard component, do the following:

1. From the top banner of the dashboard, click the **Edit Filter and Display Options** button.
2. Click the **General Display Options** tab.
3. Click the **Expand All** button to expand the categories. You can select the **Collapse All** button to collapse the list. The list is either expanded or collapsed based on the settings selected by your Administrator.
4. Select a default font and text size.
5. From the color table, select a color from the drop-down menu and click on the **Add** button.

   The colors displayed are the colors used to create your dashboard. Click on the right >> or left << arrow buttons to rearrange the color selection order. Click **Remove** to remove that color from the color table.
6. Enter a name to display on the Header, Vertical Axis Title, Horizontal Axis Title, and Footer.
7. Choose a font, font size, alignment, font color, and background color. You can also choose to disable the Header, Vertical Axis, Horizontal Axis and Footer by clicking the **Disable** box.
8. Make the necessary changes and click the **Apply** button to set these options for the current run of the component, or click the **Save** button to save the settings for future use.

CHANGING CHART DISPLAY OPTIONS

You can change the way data is displayed on a dashboard component chart by selecting the **Chart Display Options** tab. You can choose to display the data as bar charts (with horizontal stacking, or vertical stacking), or as line charts (with row lines, percent lines or stack lines), or as pie charts.

The allowed chart types may vary from component to component depending on the data and functionality.

You can further customize these bar charts and line charts by modifying the options you see on the Chart Display Option tab.

To edit the chart display options associated with a dashboard component, do the following:

1. From the top banner of the dashboard, click the **Edit Filter and Display Options** button.
2. Click the **Chart Display Options** tab.
3. Click the **Expand All** button to expand the categories. You can select the **Collapse All** button to collapse the list. The list is either expanded or collapsed based on the settings selected by your Administrator.
4. Select the type of chart (Bar or Line). Select the type of bar chart (Stack Bars, Group Bars, or Row Bars), Line chart (Row Lines, Stack Lines, or Percent Lines), or Pie chart.
5. The options you see may vary based on the type of chart you chose. Make the necessary changes and click the **Apply** button to set these options for the current run of the component, or click the **Save** button to save the chart settings for future use.

MAXIMIZING AND MINIMIZING COMPONENTS

- You can expand each component by clicking on the **Maximize Component** button.
- To restore the component, click on the **Restore** button.

DASHBOARD PDF

EnterpriseTrack allows you to save your Dashboards as a PDF file. You can choose to save either the complete Dashboard view (i.e. Executive Dashboard, etc.) or you can choose to save any one of the graphs that make your Dashboard.

GENERATING A DOCUMENT IN PDF FOR THE ENTIRE DASHBOARD

To create a document in PDF that contains all the components of your Dashboard, do the following:

1. Click the **PDF** icon in the top right-hand corner of your screen.
2. Choose the layout of your .pdf file by selecting the number of components (Project Count, Cycle Time etc.) you wish to see on each page of your .pdf document.
3. When the system creates a document in PDF in a new window, you can save or print this document from this new window.

GENERATING A DOCUMENT IN PDF FOR EACH COMPONENT OF YOUR DASHBOARD

To create a document in PDF of a particular component (e.g. Cycle Time) of your Dashboard, do the following:

1. Click the **PDF** icon in the title bar of that particular component.
2. When the system creates a document in PDF in a new window, you can save or print this document from this new window.

MOUSE-OVER

You can mouse-over the components to view the values in the bars.

DRILL-DOWN

On some components you can click on the bar to drill down to view detailed information. The information is displayed either as a list or a graph.

MANAGING DASHBOARDS

The Manage Dashboards screen allows you to create, copy, paste, and share dashboards. You can customize your dashboard by adding, editing, or deleting components that make up your dashboard. Filters can also be set for each component.

To access the Manage Dashboard screen, from the Top Navigation bar select **Go To → Dashboards → Manage**. If you are already viewing your dashboard, you can click on the **Manage** icon.

Use the **Tree pane**, **List pane**, and the **Details** pane to select and manage your dashboards.

TREE PANE

The Tree pane displays all the dashboards in the system. The dashboards are organized into folders.

My Dashboards folder contains all the dashboards that you have created.

Shared Dashboards folder contains all dashboards that have been shared by other.

Pre-defined Dashboards folder contains all dashboards that have been already created in the system. These dashboards are usually only visible to Administrators.

Global Dashboards folder contains all dashboards that are made available to users, depending on user's access profiles and permissions.

COPY AND PASTE DASHBOARDS

You can use the **Tree** pane to copy an existing dashboard and paste it into **My Dashboards**. You can then edit the dashboard to add or delete components, or adjust filters.

1. From the **Tree** pane, select the dashboard you want to copy and click on the **Copy** icon.
2. Click on the **My Dashboards** folder and click on the **Paste** icon. A copy of the selected dashboard is now in your **My Dashboards** folder. You can change the name of the dashboard by clicking on the **Edit** icon in the **Details** pane.

DELETING DASHBOARDS

Select the dashboard from the **Tree** pane and click on the **Delete** icon.

LIST PANE

The **List** pane displays all the components in the dashboard. Click on the components to view detailed information on each component. You can click on the **Edit** icon to edit your dashboard.

DETAILS PANE

When you select a dashboard, the **Details** pane contains a **General** tab and a **Sharing** tab. You can click on the **General** tab to view or edit the dashboard name or description. You can also select if this is your default dashboard.

The **Sharing** tab allows you to see if this dashboard is shared with other team members. You can also edit this tab to allow others to view your dashboard.

When you select a component in the **List** pane, the **Details** pane contains a **General** tab, **Filter** tab, **General Display Options** tab, and a **Chart Display Options** tab. You can click on the **Edit** icon to modify the filters, the general information and the display options.

SHARING DASHBOARDS

Based on your permissions, you may be able to share a dashboard. To share a dashboard:

1. From the **Manage Dashboards** page, select the dashboard to be shared.
2. From the **Details** pane click the **Sharing** tab.
3. Click the **Edit** button.
4. Click the **Share Dashboard** check box. The screen will refresh to display more options.
5. Select the users you want to share this dashboard with, and specify the time period for which the dashboard should be shared. If you specify a time period, the dashboard will automatically be unshared when the time period comes to an end. You can also choose to allow other users to copy your dashboard.
6. Click the **Save** button, or click **Cancel** to discard your changes.

CREATING A NEW DASHBOARD

Follow the steps below to create a new dashboard. See Available Dashboard Components for a list of available components

1. Navigate to the **Manage Dashboard** screen by selecting **Go To → Dashboards → Manage** from the Top Navigation bar. If you are already viewing a dashboard, click on the **Manage** icon.

2. From the **Tree** pane, select the **My Dashboard folder** and click on the **Add** icon. All new dashboards must be created under the *My Dashboard* folder. The system creates a folder (New) under *My Dashboards*.
3. In the **Details** pane, enter the following information:
   a. Enter a name for this dashboard.
   b. Choose if you want this dashboard to be active. Only active dashboards can be run.
   c. Enter a description for this dashboard.
   d. Select if you want this to be your default dashboard. If you select **Yes**, then this dashboard is displayed when you select **My Dashboards** from the Top Navigation bar or the Left Navigation bar.
4. Click the **Save** button, or click **Cancel** to discard your changes.
5. From the **Tree** pane, select the dashboard you created and click on the **Edit** button in **List** pane.

Make sure that all your pop-up blockers are inactive. Clicking the edit button will open the component gallery in a new window.

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6. The *Edit Dashboard* screen is displayed.. The *Edit Dashboard* screen allows you to create custom dashboard by using the drag-and drop feature to select components from the layout gallery. Select a category from the **Category** pull-down menu to see all the components in a particular category (for example, Project, Resource etc.).
7. The component gallery is displayed on left side of the screen. Drag and drop the component into the layout grid.
8. You can use the blue title bar to reposition the component on the layout grid. Click on the green arrow at the bottom right corner of the component to dynamically resize the component. You can remove components by dragging them into the **Trash**.
9. Once you have selected all your components, click the **Save Layout** button. You can change the filters and other characteristics of the component after saving your initial layout.
10. The Manage Dashboard screen is displayed again. In the **List** pane, select the first component by clicking on it. The **General**, **Filter**, **General Display Options**, and the **Chart Display Options** tabs are displayed in the **Details** pane.
11. Click on the **Edit** button in the **Details** pane. Select the **General** tab to make changes to the component name, or select the **Filter** tab to modify the preset filter selection, or select the **General Display Options** tab to modify the general display options, or select the **Chart Display Options** tab to modify the chart display options.
12. Click the **Save** button, or click **Cancel** to discard your changes.

13. Click the **Done** button to return to the My Dashboard page.

SETTING COMPONENT FILTERS AND DISPLAY OPTIONS

You can set filters, general display options, and chart display options for the new dashboards you create. From the **Filter** tab, you can set filters for your component. From the **General Display Options** tab you can customize a component chart by adding header, footer, vertical axis, horizontal axis, left tics and right tics. You can also control the font, color, size, and background color used in your charts. From the **Chart Display Options** tab, you can choose the type of chart (Bar or Line or Pie). You can also use the various options to customize how the bar or line charts are displayed.

You can selectively narrow the component filters and display options to enable only a subset of these settings to be editable, visible or editable/visible from the inline filter box by dashboard users. Check the **Visible** box if you want this filter or setting to be visible when the user clicks on the **Edit Filters and Display Options** icon on the component. Check the **Editable** box if you want to allow users to set a different value for this filter, or display option. Check the **In-line** box if this filter will be available as an in-line filter option when the user clicks on the **In-line filter** icon. For more information see topic Using In-line Filters.

To set the properties of the component filters, do the following:

1. From the **Details** pane on the **Manage Dashboards** page, click the **Filters** tab. Click the **Edit** button to edit the component filters.
2. Edit the various filter parameters. Check the **Visible** checkbox if you want the dashboard user to view this parameter on the filter page. Check the **Editable** box if you want to allow the dashboard user to edit the parameter on the Edit Filters and Display Options page. As a dashboard composer you can uncheck the **Editable** checkbox if you want certain filter parameters to remain unchanged. Check the **Inline** box if you want the parameter to appear on the **Inline Filter** box for this component. For more information on Inline Filters see *Using In-line Filters*.
3. From the **Details** pane click the **General Display Options** tab.
4. Click the **Edit** button to edit the general display options. Check the **Visible** checkbox if you want the dashboard user to view this parameter *on Edit Filters and Display Options* page. Check the **Editable** box if you want to allow the dashboard user to edit this parameter.
5. From the **Details** pane click the **Chart Display Options** tab.
6. Click the **Edit** button to edit the chart display options. Check the **Visible** checkbox if you want the dashboard user to view this parameter on *Edit Filters and Display Options* page. Check the **Editable** box if you want to allow the dashboard user to edit this parameter.

7. Click the **Save** button when you are finished making edits to the component filters and display settings; or click **Cancel** button to cancel your changes.

USING IN-LINE FILTERS

You can use the In-line filters to quickly modify filter parameters without navigating to the detailed filter page associated with the dashboard component. Selecting the **Inline Filter** button on the component bar brings up a subset of filter parameters that you can modify. The dashboard component is then refreshed based on the selected filter settings without disturbing the other components on the page. Dashboard composers can select the parameters that can be visible on the Inline filter box.

MODIFYING THE IN-LINE FILTERS

To modify the in-line filters and view the dashboard display, do the following:

1. From **My Dashboards**, select a dashboard component you want to modify.
2. Click the **Inline Filters** icon from the top banner.
3. The filters that are shown in-line have been set during the dashboard creation (see Setting Component Filters). The benefit of this is that only a small subset of filters is shown in the in-line screen and the underlying component is left partially visible. Further, the refresh is done in place without disruption to the other components.
4. Change the filters you want to modify and click the **Apply** button. The dashboard component is updated based on the filters you selected. When you select **Apply**, the change to the filter settings are applied only for this session and is not remembered for the next time you display this dashboard.
5. You can select **Save** to save these filter settings such that future displays of this component will use the new settings to begin with.

AVAILABLE DASHBOARD COMPONENTS

ALIGNMENT (STRATEGY)

There are 3 dashboard components in this section, and these are only valid if the system has strategy module (separately licensed) configured.

Component	Description	Drill Down	Drills To
Alignment List	This chart displays the list of child nodes with their Measure values for selected Alignment node. You can click on a link to drill down to next level in the Alignment hierarchy. You can click on data or chart icons on a particular row to change the view. If there is more than one Alignment defined in the system, you must select one Alignment to display as a default. You can change this later.	Yes	Measure list, data, and chart
Alignment-Measure Time series	This chart displays Measure Data on Y-Axis for selected Alignment node and the reporting period of X-Axis. For multi-Initiative system, choose an initiative that is to be displayed.	No	N/A
Project % Completion by Alignment	This chart displays the Percent Completion on Y-Axis for projects that qualify the filter criteria and Project Alignment (Strategy) on X-Axis. You can click on a bubble to drill down to the individual project.	Yes	Project Basics page

PROPOSALS (CHARTERS)

There is one component with the evaluation criteria.

Component	Description	Drill Down	Drills To
Proposal evaluation Criteria	This chart displays bubble chart of proposal (charter) for Proposal (Charter) that qualify the filter criteria. The X and Y Axis are represented by evaluation criteria. You must select the appropriate Initiative (if applicable) and the # of Proposal (Charter) to display. (Max 40 at a time).	Yes	Proposal Details Page

PROJECTS (SUBCATEGORY: GENERAL)

Component	Description	Drill Down	Drills To
Project Timelines	The chart displays project timeline by phases for projects that qualify the filter criteria You can filter which projects to display using various filter criteria. You can also use Program as a filter. If selected, all projects belonging to the selected Program are displayed. You can also select the display timeline (Actual and Plan, Actual, or Plan).	Yes	You can choose if you want to drill down to the Project Basics, Project Dates, or Project Status Report page.
Project Activities List	The chart displays the list of activities assigned to any user. You can filter the list to view Open, Not Applicable, or Completed activities. You can also filter to view Non-WBS, WBS activities and also milestone and key milestone activities that are pending,	Yes	Project Roadmap page

Component	Description	Drill Down	Drills To
	past due, or completed. User can click on a link to drill down to view Activity details.		
Project Issues List	The chart displays a list of project issues. You can filter on My Projects and also search for other projects. You can also filter to view issues that are not assigned to a resource. User can click on a link to drill down to view Issues details.	Yes	Project Edit Issue page
Project Bubble Chart	Displays a project bubble chart based on your filter criteria. You can customize the chart by selecting the parameters to display on the X axis and Y axis. You can also swap the X and Y axis parameters. Click on a link to drill down to view the Project Basics page.	Yes	Project Basics page
My Project Timelines	The chart displays project timeline by phases for projects that the user logged-in user is a team member on. The set of these associated projects is shown as a list and a selection can be made of which ones to display The Actual and Plan timelines are displayed This component is provided for backward compatibility. This component is deprecated for future use and the new Project Timelines component (above) should be used	Yes	Project Dates page

Component	Description	Drill Down	Drills To
	instead		
My Project Open Activities List	This component displays a list of open activities on the projects that the logged-in user is a team member on There are no filters This component is provided for backward compatibility. This component is deprecated for future use and the new Project Activities List component (above) should be used instead	No	
My Project Issues List	This component displays a list of Issues on the projects that the logged-in user is a team member on There are no filters This component is provided for backward compatibility. This component is deprecated for future use and the new Project Issues List component (above) should be used instead	No	

PROJECTS (SUBCATEGORY: COUNT)

Component	Description	Drill Down	Drills To
Project Count by Org	The chart displays the number of projects on Y-Axis that qualify the filter criteria and Organization on X-Axis. User can select different level of organization to show on the X-Axis from the filter criteria. Projects that aligned to multiple	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	organizations will be counted in multiple organizations. User can click on a bard to drill down to the list of projects that contribute to the bar.		
Project Count by Period	The chart displays number of projects on Y-Axis that qualify the filter criteria and reporting period on X-Axis. Projects that start in one year and end in the next year will be counted in both years. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period. Click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Count by Status	The chart displays the number of projects on Y-Axis that qualify the filter criteria and Current Project Status on X-Axis. User can click on a bar to drill down to the project types and then to the list of projects that contribute to the bar. The chart shows system wide project counts, except confidential projects, depending on the user's permission.	Yes	Project Listing Report
Project Count by Classification	The chart displays the number of projects that qualify the filter criteria	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	on Y-Axis and the selected classification field on X-Axis. Projects that are aligned to multiple classification fields will be counted in multiple classifications. User can click on a bar to drill down to the list of projects that contribute to the bar.		
Project Count by Alignment	The chart displays the number of projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. This chart only works when the system has an Alignment (Strategy) configured. Projects that are aligned to multiple alignments will be counted in multiple alignments. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Count by Phase	The chart displays the number of projects that qualify the filter criteria on Y-Axis and Phases on X-Axis. Within a Phase projects are grouped by their on-time status (On Schedule, Schedule At Risk and Behind Schedule) If one roadmap is selected in the filter, then the phases are displayed the order specified in the Roadmap. If multiple roadmaps are selected in the filter, then the Phases are displayed alphabetically.	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	User can click on a bar to drill down to the list of projects that contribute to the bar.		
Project Count by Phase Cycle Time Grouping	The chart displays the number of Phases closed in the recommended Phase duration (Red, Amber, and Green) for projects that qualify the filter criteria on Y-Axis and Phases X-Axis. If one roadmap is selected in the filter, then the phases are displayed the order specified in the roadmap. If multiple roadmaps are selected in the filter, then the phases are displayed alphabetically. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Count By Custom Field	The chart displays the number of projects that qualify the filter criteria on Y-axis and the selected custom field on X-axis. You can click on a bar to drill down to the list of projects.	Yes	Project Listing Report

PROJECTS (SUBCATEGORY: CYCLE TIME)

Component	Description	Drill Down	Drills To
Project Cycle Time by Period	The chart displays projects cycle time by various Phases on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. Projects that start in one year and end in the next year will be counted in both years. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Cycle Time by Role	The chart displays the average cycle time for projects on Y-Axis that qualify the filter criteria and Users on X-Axis. User can click on a bar to drill down to the list of projects that contribute to the bar. The user selection is based on the System Access Profile definition then must be further defined by an individual user level selection.	Yes	Project Listing Report
Project Cycle Time by Alignment	The chart displays the cycle time for projects that qualify the filter criteria on Y-Axis and immediate children of	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	selected Alignment node on X-Axis. This chart only works when the system has an Alignment (Strategy) configured. Projects that are aligned to multiple alignments are counted in multiple alignments. Click on a bar to drill down to the list of projects that contribute to the bar. User can select to display by Average or Median days of the cycle time.		
Project Cycle Time by Classification	The chart displays the cycle time for projects that qualify the filter criteria on Y-Axis and the selected classification field on X-Axis. Projects that are aligned to multiple classification fields will be counted in multiple classifications. User can click on a bar to drill down to the list of projects that contribute to the bar. In a multi-Initiative system, a selection must be made to specify the Initiative to be used.	Yes	Project Listing Report
Project Cycle Time by Phase (Box Chart)	The chart displays box plot of cycle tie on Y-Axis and Phases X-Axis. If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. Only the completed phases will be	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	counted towards calculation of the box plot as on-going (or active) phase does not have the actual end date of the phase.		
Project Cycle Time by Organization	The chart displays the cycle time for projects on Y-Axis that qualify the filter criteria and Organization on X-Axis. User can select different level of organization to show on the X-Axis from the filter criteria. Projects that aligned to multiple organizations will be counted in multiple organizations. User can click on a bard to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Cycle Time by Custom Field	The chart displays the cycle time for projects on Y-Axis that qualify the filter criteria and the selected custom field on X-Axis. You can click on the bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report

PROJECTS (SUBCATEGORY: FINANCES)

Components	Description	Drill Down	Drills To
Project Finances by Org.	The chart displays the total for selected financial categories on Y-Axis for projects that qualify the filter criteria and Organization on X-Axis. User can click on a bar to drill down to	Yes	Project Listing Report

Components	Description	Drill Down	Drills To
	the list of projects that contribute to the bar. The chart can be displayed on different levels of the defined organization structure by the filter selection.		
Project Finances by Period	The chart displays the realized vs. forecast finances on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period. User can click on a bar to drill down to the list of projects that contribute to the bar. The Forecast is the total finances that are current for all projects in the system. The Realized (Actual) is the total finances that are locked for all projects in the system.	No	N/A
% of Projects with Finances by Period	The chart displays the percent of projects with financial benefits on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. If more than one financial category is selected, then the percent of projects with benefits is calculated based on the sum of the selected financial	No	N/A

Components	Description	Drill Down	Drills To
	categories. If a project contributes to more than one year, the project's financial impact will be attributed to the corresponding reporting period. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period. User can click on a bar to drill down to the project types and then to the list of projects that contribute to the bar.		
Finance Line Chart by Period	The chart displays Net Finances on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Priority by Finances	The chart displays the Risk or Priority on Y-Axis for the projects that qualify the filter criteria and Finances on X-Axis. User can click on a bubble to drill down to the individual projects.	Yes	Project Basics page
Project Finances by Alignment	The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis.	Yes	Project Listing Report

Components	Description	Drill Down	Drills To
	This chart only works when the system has an Alignment (Strategy) configured. Projects that are aligned to multiple alignments are counted in multiple alignments using specified percent allocation. Click on a bar to drill down to the list of projects that contribute to the bar.		
Project Finances by Classification	The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and selected classification field on X-Axis. Projects that are aligned to multiple classification fields will be counted in multiple classifications. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Finances by Phase	The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and Phases X-Axis. If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Finances by Custom Fields	The chart displays the sum of finances that qualify the filter criteria on Y-Axis and the selected classification	Yes	Project Listing Report

Components	Description	Drill Down	Drills To
	field on X-Axis. You can drill down to a list of projects that contribute to the bar.		

PROJECTS (SUBCATEGORY: METRICS)

Component	Description	Drill Down	Drills To
% Change In Metrics By Period	The chart displays the percent change in metrics on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis The chart can report on either primary project metric or specific metric type. (One at a time.) Projects that start in one year and end in the next year will be counted in both years. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD. E.g. 2009YTD where YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period. User can click on a bar to drill down to the list of projects that contribute to the bar.	Yes	Project Listing Report
Project Metrics Timeseries	The chart displays Primary Metrics on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis for the projects that the current user is associated with. System Administrator will *not* see any	No	N/A

Component	Description	Drill Down	Drills To
	information when running this dashboard.		

RESOURCE

Component	Description	Drill Down	Drills To
Resource Certifications by Period	The chart displays the number of user certifications by certification type on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis This chart shows information only when there is associated certification defined in the system. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD. E.g. 2009YTD where YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.	No	N/A
Resource Count by System Access Profile	The chart displays a pie chart of distribution of resources that qualify the filter criteria. Resources are grouped by System Access Profile. The filters are available to select the resources based on the organization hierarchy and/or the status of the resource within the system.	No	N/A
Resource Certifications by Org	Displays the number of certifications for resources that qualify the filter criteria on Y-Axis and organization on	No	N/A

Component	Description	Drill Down	Drills To
	X-Axis. This chart shows information only when there is associated certification defined in the system. User can click on a bar to drill down to the list of projects that contribute to the bar. The chart can be displayed on different levels of the defined organization structure by the filter selection. Appropriate Initiative should be selected in filter.		
Planned/Actual Utilization (%)	The chart displays Heat map by resource. The user is allowed to select multiple initiatives if more than one is configured. This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. Both plan and actual % are always displayed. Display can be configured for daily or monthly.	No	N/A
Planned/Actual Effort (Hours)	The chart displays Heat map by project. The user is allowed to select multiple initiatives if more than one is configured. This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. Both plan and actual hours are always	No	N/A

Component	Description	Drill Down	Drills To
	displayed. Display can be configured for daily or monthly.		
Planned/Actual Effort (Hours) by Project Type, or by Project Methodology, or by Organization, or by Alignment, or by Classification	The chart displays Heat map by project. The user is allowed to select multiple initiatives if more than one is configured. This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. Both plan and actual hours are always displayed. Display can be configured for daily or monthly.	No	N/A

WORKING WITH PROJECT BUBBLE CHARTS

Bubble charts can give you powerful insights into your projects by allowing you to show projects in a 2 dimensional chart, with each project represented by a bubble. Bubble chart provides extensive parameter options.

You can use various parameters for the X axis and the Y axis. Both axes allow for choosing from a set of discrete properties of projects or from a set of values that can vary with time as the project proceeds. Discrete properties include: classification field, alignment mode, programs, process area, division, strategies, custom field of type list, or finance aggregate, etc. The time-varying status/values include: % completion, risk, finances, etc.

The following is a list of all available parameter options:

- Organization – Division
- Organization – Business Unit
- Organization – Location
- Organization – Region
- Classification – Functional Area

- Classification – Process Area
- Classification – Project Source
- Programs
- Risk
- Plan Effort
- Actual Effort
- % Completion
- Project Status
- Number of Open Issues
- Number of Closed Issues
- Number of Open Activities
- Number of Closed Activities
- Project Duration
- Initial Planned Duration
- Current Planned Duration
- Actual Duration
- Current Stage
- Project End Date
- Initial Planned Project Start Date
- Initial Planned Project End Date
- Current Planned Project Start Date
- Current Planned Project End Date
- Actual Project Start Date
- Actual Project End Date
- Strategies
- Scorecards
- Processes
- Program

- Finance Aggregate
- Project Tracking Details
- Project Type
- Roadmap
- Project Manager

You can swap the X and Y axes for a visual rearrangement of the bubbles. The size and color of the bubbles can be driven by various parameters. You can choose fixed size or have it based on effort, team members (including and excluding TBD), and finance aggregate. The bubble color can also be fixed or be based on completion status, risk or schedule

Like the other dashboards you can mouse over the bubbles for more information, and you can click on the chart to further drill down. The Project Basics page is displayed. When you maximize the component you can view the dashboard component legends like the bubble color, and size.

If Finance Aggregate values are chosen as the parameter for the axes or for the bubble size, then additional dependent filters are shown to determine which finance values will be used for the chart.

CREATING A PROJECT BUBBLE CHART

To create a project bubble chart, do the following:

1. Navigate to the Manage Dashboard screen by selecting **Go To** > **Dashboards** > **Manage** from the Top Navigation bar. If you are already viewing a dashboard, click on the **Manage** icon.
2. In the **Tree** pane, click on the name of your dashboard.
3. In the **List** pane, click on the **Edit** button. The Edit Dashboards page is displayed.

Make sure that all your pop-up blockers are inactive.

4. Clicking the **Edit** button will open the component gallery on the Edit Dashboards page.
5. From the **Category** pull-down menu, select **Projects**. From the Subcategory pull-down menu select **General**.
6. Select the **Project Bubble Chart** dashboard components from the gallery and drag it into the layout grid.
7. Click the **Save Layout** button to save your dashboard layout.
8. From the **Manage Dashboards** screen, select the **Project Bubble Chart** component from the **List** tab.

9. Select the **Filters** tab from the **Details** pane and click on the **Edit** button.
10. Choose an **Initiative** for the dashboard.
11. From the **Dashboard** section, select the number of projects to show.
12. Check the **Inline** box associated with each filter parameter if you want to be able to edit these parameters using the **Inline Filters** screen.
13. From the drop-down list select a parameter for the X axis.
14. Select a parameter for the Y-axis from the drop-down list.
15. If you selected **Finance Aggregate** for X or Y axis, then you will see options to select a finance category, finance window, finance dataset, and specify a snapshot for plan.
16. Select the bubble size. You can choose fixed or have it be based on effort, or team members (including or excluding TBDs).
17. You can select if the bubble color should be fixed, based on completion status, risk, or schedule.
    a. Click on the **Select Color** link to choose a color.
    b. If you selected the bubble color to be determined by the Completion Status, then enter a percentage for the bubble colors.
18. Click the **Save** button to save your changes.
19. From the **Details** pane, select the **General Display Options** tab and click on the **Edit** button.
20. Make the changes and click the **Save** button to save your changes.
21. From the **Details** pane, select the **Chart Display Options** tab and click on the **Edit** button.
22. Select if you want to enable bubble shadow, and choose the color, X offset, Y Offset and the width of the bubble shadow.
23. Click the **Save** button to save your changes.

SWAPPING X-AXIS AND Y-AXIS

To swap the X-axis and Y-axis parameters, click the **Inline Filters** button on the top banner of the Project Bubble Chart dashboard. From the Inline Filters screen, check the **Swap X and Y Axis** checkbox to swap the axis parameters. Click **Apply** to refresh the dashboard, or click **Save** to save the changes.

CHAPTER 3

WORKING WITH REPORTS

Two levels of reports are available in EnterpriseTrack – project specific, and across projects. This section describes cross-project reports. You can access the cross-project reports by clicking on the **Reports** option in the Left Navigation bar, or select **Go To → Reports →Standard** and **Go To → Reports →Ad-hoc** from the Top Navigation bar.

Visit each report to see what it displays. Cross-project reports can either be restricted to an initiative, or could be across initiatives.

When you click on the **Reports** link, two or three sub-links are displayed under the **Reports** menu – **Standard Reports**, **Ad-hoc Reports** and **Custom Reports**. The Custom Reports link is displayed only if there are any custom reports configured for your system.

Managing and Running Standard Reports

Standard Reports are all the predefined reports available in the system. To access **Standard Report** from the Top Navigation bar select **Go To** → **Reports** → **Standard**.

Tree Pane

The **Tree** pane displays all the reports in the system. The reports are organized into folders.

- **My Reports** folder contains all reports that you have created.
- **Shared Reports** folder contains all reports that have been shared by other.
- **Pre-defined Reports** folder contains all reports that have been already created in the system.
- **Global Reports** folder contains all the global reports.
- **Custom Reports** folder contains all reports that are customized for your system.

Copy and Paste Folders

You can use the **Tree** pane to copy an existing report folder and paste it into **My Reports**. You can then edit the folder by adding or deleting reports or adjusting filters.

1. From the **Tree** pane, select the report folder you want to copy and click on the **Copy** icon.
2. Click on the **My Reports** folder and click on the **Paste** icon. A copy of the selected folder is now in your **My Reports** folder.
3. You can change the name of the report by clicking on the **Edit** icon in the **Details** pane.

Deleting Folders

Select the reports folder from the **Tree** pane and click on the **Delete** icon.

Expanding Folders

To expand all the folders in the **Tree** pane, click on the **Expand All** icon. To collapse all the folders, click on the **Collapse All** icon.

List Pane

The **List** pane displays all the reports under a folder. Click on the report to view detailed information in the **Details** pane.

COPY AND PASTE REPORTS

To copy a report, select a report from the **List** pane and click on the **Copy** icon. Select a folder under **My Reports** and click on the **Paste** icon in the **List** Pane.

DELETING REPORTS

To delete a report, click on the **Delete** icon in the **List** Pane.

RUNNING A REPORT

To run a report using the existing filters, click on the **Run Report** icon in the **Action** column. Click on the **Run with Filters** icon to customize your report by adjusting filters. For more information, see *Running* Standard Reports.

DETAILS PANE

When you select a report, the **Details** pane contains a **General** tab, **Filter** tab, **Output** tab, **Schedule** and **Email** tab, **History** tab and a **Sharing** tab.

MAXIMIZING AND MINIMIZING

You can expand the pane by clicking on the **Maximize** button. To minimize the pane, click on the **Restore** button.

GENERAL TAB

You can click on the **General** tab to view or edit the report name or description.

FILTER TAB

The **Filter** tab allows you to modify filters to create custom reports.

OUTPUT TAB

The **Output** tab allows you to select the output format.

SCHEDULE AND EMAIL TAB

From the **Schedule and Email** tab, select run type (Manual or Scheduled). If you select **Scheduled**, then you can choose to send emails.

HISTORY TAB

From the **History** tab, you can view the history of this report. Click on the **Edit** icon to select how long you want to save the reports.

SHARING TAB

The **Sharing** tab allows you to see if this report is shared with other team members. You can also edit this tab to allow others to view your report.

RUNNING STANDARD REPORTS

To run a standard report, do the following:

1. Navigate to Standard Reports by selecting **Go To → Reports → Standard** from the Top Navigation bar, or select **Reports → Standard** from the Left Navigation bar.
2. The Manage Reports screen is displayed. From the **Tree** pane select a reports folder.
3. A list of reports is displayed in the **List** pane. Select the report you want to run.
4. You can click on the **Run Report** icon in the **Action** column to run the report using the existing filter and output criteria.
5. To filter before running the report, click on the on the **Run with Filters** icon. The **Filters** tab is displayed in the **Details** pane.
6. Click on the **Expand All** button to expand the filter categories. You can click on the **Collapse All** button to collapse the categories.
7. Select the filters you want to use to generate this report. To run the report without changing the output parameters click the **Run** button. You can also select the **Reset Filters** button to reset the filters. For more information on modifying the filters for Project Finances Group Aggregate, Project Finances Element Aggregate, or Project Finances Element Monthly Detail reports, see *Using Finance Aggregate Report Filters*.
8. To modify the output parameters, click on the **Output** tab.
9. Select the output parameters like report format, primary sort direction, compress output, etc.
10. Click on the **Run** button. The screen refreshes to display the report.
11. Click on the **Show Current Filters** link to view the current filters.
12. Click **Done** when you are finished viewing the report.

USING FINANCE AGGREGATE REPORT FILTERS

The screen samples below shows the additional filters associated with the *Project Finances Group Aggregate*, *Project Finances Element Aggregate*, and the *Project Finances Element Monthly Detail* reports.

The (Set 1) and (Set 2) are two sets of filters for two sets of output columns in the *Finance Group Aggregate* and the *Finances Element Aggregate* reports. The two sets allow you to compare finance aggregate values. You can independently set three filters for each set.

PROJECT FINANCES GROUP AGGREGATE FILTERS

PROJECT FINANCES ELEMENT AGGREGATE FILTERS

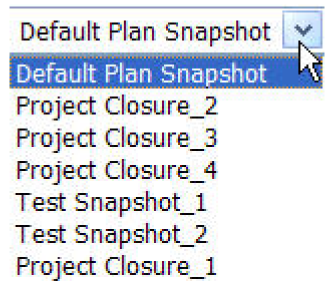
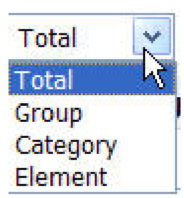
PROJECT FINANCES ELEMENT MONTHLY DETAIL FILTERS

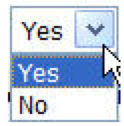
In addition to entering the **Finances** filters shown below, you can also choose the common **Finance Aggregate Definition** filters.

The table below describes the finance aggregate related filters.

Filters	Pull-down Values	Description
Common Filters		
Date Range	This Fiscal Year Previous Fiscal Year Next Fiscal Year Any start to end month All Fiscal Years Trailing 12 months Next 12 months This Fiscal Qtr Previous Fiscal Qtr Next Fiscal Qtr This Fiscal Year Q1 This Fiscal Year Q2 This Fiscal Year Q3 This Fiscal Year Q4 Current Month Previous Month Next Month	The range of months that are used to generate the aggregate value of the Total, Group1, Group 2 etc., columns in the aggregate reports. For Monthly reports, this determines the months that will be populated in the output, all other months will have 0 values. For Annual totals, use one of the different Fiscal Year choices. For Quarterly totals, use one of the different Quarter choices. If you want totals for a particular month, use one of the Month choices. For a range of months, use "Any Start or End Month" You can choose aggregation of past or future months.
Finance Dataset	Current Current Current Before This Month Current After This Month Current Before Lock Month Current After/Including Lock Month Plan Plan Before This Month Plan After This Month Plan Before Lock Month Plan After Lock Month Current Before This Month,Plan After This Month Current Before Lock Month,Plan After Lock Month	This filter determines which set of month-by-month values for the Date Range specified above are considered for aggregation in the Aggregate reports, and which finance values are fed into the month-by-month columns as non-zero in the Monthly reports. For each project, the system displays by default the "Current" values in the Finance page, and is automatically updated from the Project Activities or from the

Filters	Pull-down Values	Description
		Project Team Finances (provided the Finance Template has been configured to receive these values). You can also take Snapshots of the "Current" value and store this as a "Plan" and not have it updated as edits are made or as the Project Activity and Project Team finances change. This Filter allows you to select which Dataset (Current or Plan) you are interested in outputting in the report. If you are using Lock months to lock finances, the filter also allows you to consider the Lock month in generating the aggregate for the other months. For example, you can choose to take values from before the Lock month if you go through a finance validation that ensures that the numbers before the Lock month have been checked. Further, the filter allows you to also consider this month (when the report is run) and take the Plan values from before this month and the Current values from after (and including) this month.

Filters	Pull-down Values	Description
Snapshot for Plan		If the Finance Dataset filter refers to a Plan value, then the “Snapshot for Plan” further defines which of the Snapshots should be used for the report output. The Default Plan Snapshot is always at the top of the list. The system shows the complete list of all Snapshots taken in the drop-down list (up to a limit of 100). To ensure consistent aggregation of values, it is recommended that all users that make snapshots use a consistent naming scheme.
Specific Filter for Element Monthly Detail Report		
Finance Detail Level		The filter sets the level of detail of the Finance element hierarchy that is shown in the report. This also sets the number of rows in the output per project. Total: means show only the top level (Total). Group: means show the Group level, one level below Total (up to 5, depends on number of Groups configured) Category: means show the Category level, 2 levels below Total Element: means show the Element level, 3 levels below Total

Filters	Pull-down Values	Description
Show Upper Levels		This filter decides if the output should show higher levels of the Finance items hierarchy when a lower level item is chosen in the Finance Detail Level filter above This is relevant if you are doing your own aggregation of the element level values using Excel and you do not want the Category, Group, Total level values to interfere with this aggregation.

The table below describes the additional output parameters for the *Project Finances Element Monthly Detail* report.

Output Parameters	Description
Starting Month	Enter the starting month. This output setting decides which set of months will be shown in the report output.
Number of Months	Enter the number of months. For instance, you may set the number of months to 36 starting with January 2010 for several runs of this report. Then depending on the Date Range filter setting (above) varying sets of months of these 36 will be populated for different runs of the report.

LIST OF PRE-DEFINED STANDARD REPORTS

The following table lists the pre-defined standard reports in the EnterpriseTrack system.

Standard Reports	Description
Project Request Listing	Displays all project requests in the system.
Charter Request Listing	Displays all charter requests in the system.
Project Listing	Displays all projects in the system.
Project Listing Report with Activity List	Displays the project listing report with activity

Standard Reports	Description
	list.
Resource Listing	Displays all resources in the system.
Project Status	Displays the status of all projects in the system.
Resource Status	Displays the status all resources in the system.
Activity Detail Report	Displays a detailed report on each activity associated with a project.
Finance Summary Report	Displays the finance summary report.
Project Summary by Organization	Displays project summary by organization.
Project Summary by Alignment Report	Displays project summary by alignment report.
Project Summary by Project Source	Displays project summary by project source.
Project Summary by Program	Displays project summary by process area.
Project Summary by External Factors	Displays project summary by external factors.
Project Summary by Process Area	Displays project summary by process area.
Project Summary Stats by Role	Displays project summary statistics by role.
Closed Project Listing	Displays all closed projects.
Active/Close Project Report	Displays active and closed project reports.
Project Listing Report with Activity List	Displays detailed project listing report with activity list.
Project Listing by Role	Displays project listing by role.
Project Final Report	Displays the final project report.
Project Review Report	Displays the project review report.
Project Control Report	Displays the project control report.
Project Notes Report	Displays the notes associated with the project.

Standard Reports	Description
Project Issues Report	Displays the issues associated with the project.
Project Storyboard	Displays a project storyboard in Microsoft PowerPoint.
Project Request Eval	Displays the project request evaluation.
Charter Eval	Displays the charter evaluation.
Project Finance Spreadsheet Report	Displays the project finances as a spreadsheet.
Project Detail Spreadsheet Report	Displays project details in a spreadsheet.
Financial Savings by Business Unit	Displays the financial savings by business unit.
Project Finances Group Aggregate	Displays the finances group aggregate.
Project Finances Element Aggregate	Displays the finances element aggregate.
Project Finances Element Monthly Detail	Displays the finances element monthly detail.
Resource Professional Certifications	Displays professions certifications
Resource Expertise/Skills	Displays resource expertise and skills.
Resource Assets	Displays resource assets.
Heat Map by Resource	Displays a heat map by resource.
Heat Map by Role	Displays a heat map by role.
Heat map by Project	Displays a heat map by project.
Resource Utilization Chart Report	Displays the resource utilization report.
Project Effort Chart Report	Displays the project effort.
Timesheet Report by Project	Displays timesheet report by project.
Timesheet Report by Resource	Displays timesheet report by resource.
Timesheet Detail Report	Displays a detailed timesheet report.

LISTING REPORTS

You can generate customized listing reports using the filter and output options.

PROJECT REQUEST LISTING

Based on your filters, this report displays all project requests in the system. It displays the project request, the status, a description, division, business unit, primary contact, assignee, submission date, date accepted/rejected, and the evaluation score. The output choices are CSV, PDF and HTML.

Depending on your configuration, the Project Request Listing is the same as Ideas Listing Report label.

CHARTER REQUEST LISTING

Based on your filters, this report displays all charter requests in the system. It displays the charter ID, name, status, division, business unit, project leader, planned start date, actual start date, planned project close date, initial forecast savings, initial forecast cost, and the evaluation score. The output choices are CSV, PDF and HTML.

PROJECT LISTING

Based on your filters, this report displays all projects in the system. It displays the initiative, phase, status, plan, start date, program, and region. The output choices are CSV, PDF and HTML.

PROJECT LISTING REPORT WITH ACTIVITY LIST

Based on your filters, this report displays all projects with the activity list. It displays the project details, and the project activity details like the type, name, status, number of attachments, dates, and the status of milestones. The output choices are CSV, PDF and HTML.

RESOURCE LISTING

Based on your filters, this report displays all resources. It displays the name, resource type, email address, phone number, access profile, allowed roles, business unit, manager, and initiative. The output choices are CSV, PDF and HTML.

PROJECT STATUS

Based on your filters, this report displays the status of projects. It displays the ID, name, status, team size, timesheet, related entities #, and activities # with milestones and key milestones. The output choices are CSV, PDF and HTML.

RESOURCE STATUS

Based on your filters, this report displays the status of resources. It displays the name, login ID, status, last login date, timesheet, last timesheet submission date, and related entities. The output choices are PDF and HTML.

ACTIVITY DETAIL REPORT

This is a detailed report on each activity associated with a project. You can filter on initiative, program, all project activities, LET (Labor Expense Type), labor expense categories, and resource related fields. You can use the output generated from this report to create custom User-Defined Excel reports to view activity-related information for a specific project or group of projects. The output includes LET and labor expense categories. The output choices are CSV, HTML, PDF, and XLS.

PROJECT REPORTS (SUMMARY REPORTS)

You can generate customized project summary reports using the filter and output options.

FINANCE SUMMARY REPORT

Based on your filters, this report displays the finance summary. Before running this report, you must choose a Finance Template and the Finance Type (Plan or Actual) from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY BY ORGANIZATION

Based on your filters, this report displays the finance summary by organization. Before running this report, you must choose a Finance Template from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY BY ALIGNMENT REPORT

Based on your filters, this report displays the project summary by alignment. It displays the processes, project count (active and closed) and the project finances. Before running this report, you must choose a Finance Template, the Finance Type (Plan or Actual), the Alignment List and Note from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY BY PROJECT SOURCE

Based on your filters, this report displays the finance summary by project source. It displays project source, project count (active and closed) and project finances. Before running this report, you must choose a Finance Template from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY BY PROGRAM

Based on your filters, this report displays the finance summary by program. It displays programs, project count (active and closed) and project finances. Before running this report, you must choose a Finance Template from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY BY EXTERNAL FACTORS

Based on your filters, this report displays the finance summary by external factors. It displays the external factors, project count (active and closed) and project finances. Before running this report, you must choose a Finance Template from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY BY PROCESS AREA

Based on your filters, this report displays the finance summary by process area. It displays the external factors, project count (active and closed) and project finances. Before running this report, you must choose a Finance Template from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT SUMMARY STATS BY ROLE

Based on your filters, this report displays the project summary statistics by resource roles. Before running this report, you must choose an Initiative and Resource Role from the Filter tab. The output choices are CSV, PDF and HTML.

CLOSED PROJECT LISTING

Based on your filters, this report displays all closed projects. It displays the initiative, project number, name and close date and project type. The output choices are CSV, PDF and HTML.

ACTIVE/CLOSE PROJECT REPORT

Based on your filters, this report displays all active and closed projects. It displays the initiative, project number, name and close date and project type. It also displays the finances associate with the project. The output choices are CSV, PDF and HTML.

PROJECT REPORT (DETAIL REPORTS)

You can generate customized detailed project reports using the filter and output options.

PROJECT LISTING REPORT WITH ACTIVITY LIST

Based on your filters, this report displays all projects with the activity list. It displays the project details, and the project activity details like the type, name, status, number of attachments, dates, and the status of milestones. The output choices are CSV, PDF and HTML.

PROJECT LISTING BY ROLE

Based on your filters, this report displays the projects by resource roles. It displays the project sponsor, project metrics, project ID, name, development activity dates, post implementation activity dates, implementation dates, stress/load testing days, usability testing days, testing days, analysis tool days etc. Before running this report, you must choose an Initiative and Resource Role from the Filter tab. The output choices are CSV, PDF and HTML.

PROJECT FINAL REPORT

Based on your filters, this report displays the project final report. The output choices are PDF and HTML.

PROJECT REVIEW REPORT

Based on your filters, this report displays the aggregate project review report. It displays the project name, manager, financial representative, and detail information on each project activity. The output choices are PDF and HTML.

PROJECT CONTROL REPORT

Based on your filters, this report displays the project control report. The output choices are PDF and HTML.

PROJECT NOTES REPORT

Based on your filters, this report displays the project notes report. The output choices are PDF and HTML.

PROJECT ISSUES REPORT

Based on your filters, this report displays the project issues report. The output choices are PDF and HTML.

PROJECT STORYBOARD

Based on your filters, a project storyboard is created. The output option is MS PowerPoint. Follow the instruction under the **Help** tab to export project data to Microsoft PowerPoint.

PROJECT REQUEST EVAL

Based on your filters, this report displays the evaluation of all project requests or ideas in the system. The output choices are CSV, PDF and HTML.

CHARTER EVAL

Based on your filters, this report displays the evaluation of all charters in the system. The output choices are CSV, PDF and HTML.

PROJECT REPORTS (SPREADSHEET REPORTS)

You can generate customized spreadsheet reports using the filter and output options.

FINANCE AGGREGATE REPORTS

The Finance Aggregate Reports can be very useful to your business as they can be customized to your needs. Using EnterpriseTrack you can extensively configure finance reports by configuring the level of group, category, and element details. You can also configure based on time period (annual versus monthly), and by optional use of lock months. Also, your finances may involve separate Plan versus Actual, or a single set of numbers that starts off as Plan and then is updated each month into Actual for the previous months. You can create snapshots for comparisons by keeping the prior values. Regardless of how you are currently using the Finance module, the three Finance Aggregate Reports can be configured with the use of a small set of filters to create a report output that is best suited to your needs. You can also use these reports as data sources to generate highly specific output in the form of Excel charts, pivot table and any company-style formatted output (see *Creating User-Defined Reports*).

The three Finance Aggregate Reports provide increasing levels of detailed information. They also provide extensive columns of non-financial information about projects such as– organization, classification, users, custom fields, etc. The hierarchy of finance information can be visualized as:

Total

    Group1

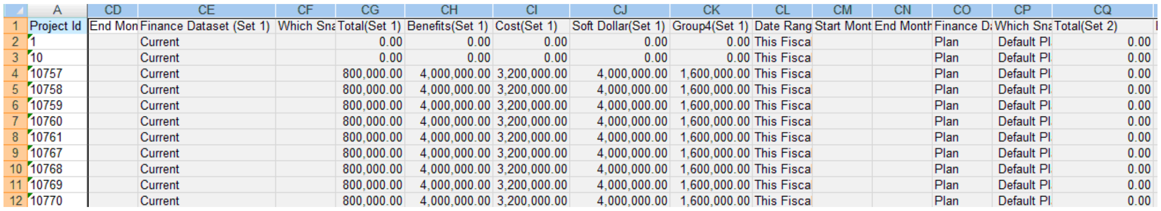
        Category 1.1

            Element 1.1.1

Total refers to the sum-total finance value of a Project. Group1,2,3,4,5 refers to the items in the Finance Template hierarchy you have configured just below the Total level. Categories are the items below Groups and Elements are the items below Categories.

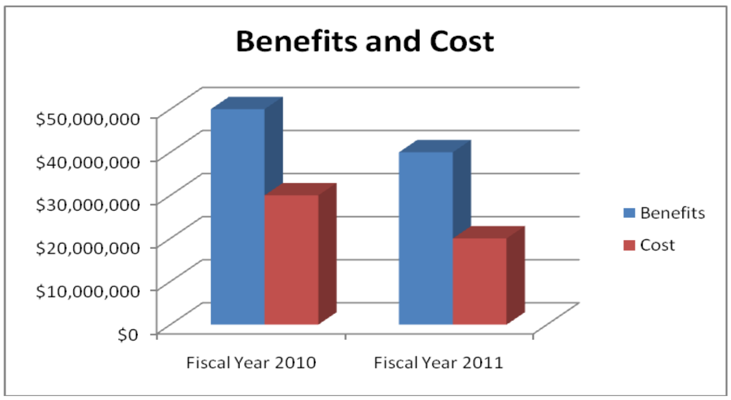
See Project *Finances* Group Aggregate, *Project Finances Element Aggregate*, and *Project Finances Element Monthly Detail* for more information on each of the three Finance Aggregate Reports. See *Using Finance Aggregate Report Filters* for more information on using Filters.

SAMPLE REPORT



	A	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ
1	Project Id	End Mon	Finance Dataset (Set 1)	Which Sna	Total(Set 1)	Benefits(Set 1)	Cost(Set 1)	Soft Dollar(Set 1)	Group4(Set 1)	Date Rang	Start Mont	End Month	Finance Da	Which Sna	Total(Set 2)
2	1		Current		0.00	0.00	0.00	0.00	0.00	This Fisca			Plan	Default Pl	0.00
3	10		Current		0.00	0.00	0.00	0.00	0.00	This Fisca			Plan	Default Pl	0.00
4	10757		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
5	10758		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
6	10759		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
7	10760		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
8	10761		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
9	10767		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
10	10768		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
11	10769		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00
12	10770		Current		800,000.00	4,000,000.00	3,200,000.00	4,000,000.00	1,600,000.00	This Fisca			Plan	Default Pl	0.00

The sample below is an example of what you can do by using the data generated from the Finance Aggregate Reports as data sources to create custom generated user reports.



PROJECT FINANCE SPREADSHEET REPORT

You can generate the project finance report using the filter and output options. The report is displayed in Microsoft Excel. You must first download the template. The output is in CSV format.

PROJECT DETAIL SPREADSHEET REPORT

You can generate a detailed project report using the filter and output options. The report is displayed in Microsoft Excel. You must first download the template. The output is in CSV format.

FINANCIAL SAVINGS BY BUSINESS UNIT

You can generate a financial savings report by business unit using the filter and output options. The report is displayed in Microsoft Excel. The output is in CSV format.

PROJECT FINANCES GROUP AGGREGATE

You can generate a finances group aggregate report by using the filter and output options. The report is displayed in Microsoft Excel. The output is in MS-Excel format. For more information on filtering, see *Using Finance Aggregate Report Filters*.

It displays:

- New financial columns that sum up the Group1-5 and Total values over a chosen date range and chosen from actual, plan, before/after lock based on the filter settings.
- 1 project per row.
- Aggregates and does not show monthly details.

PROJECT FINANCES ELEMENT AGGREGATE

You can generate a finances element aggregate report by using the filter and output options. The report is displayed in Microsoft Excel. The output is in MS-Excel format. For more information on filtering, see *Using Finance Aggregate Report Filters.*

It displays:

- New financial columns that sum up the Group1-5 and Total values over a chosen date range and chosen from actual, plan, before/after lock based on the filter settings.
- Multiple projects per row. One row is shown for each configured item in the Finance Template hierarchy.
- Aggregates and does not show monthly details.

PROJECT FINANCES ELEMENT MONTHLY DETAIL

You can generate a finances element monthly detail report by using the filter and output options. The report is displayed in Microsoft Excel. The output is in MS-Excel format. For more information on filtering, see *Using Finance Aggregate Report Filters.*

It displays:

- Month by month values for the date range based on the filter settings.
- Multiple projects per row. One row is shown for each configured item in the Finance template hierarchy.

RESOURCE REPORTS (DETAIL REPORTS)

You can generate customized detailed resource reports using the filter and output options.

When running heatmap reports, you can choose to view or hide all rows with zero values. From the **Output** tab, select **Yes** for the filter *Hide Rows with Zero effect*.

RESOURCE PROFESSIONAL CERTIFICATIONS

Based on your filters, this report displays all the certificates received by resources. The output choices are CSV, PDF and HTML.

RESOURCE EXPERTISE/SKILLS

Based on your filters, this report displays the skills and expertise the resources have. The output choices are CSV, PDF and HTML.

RESOURCE ASSETS

Based on your filters, this report displays the skills and expertise the resources have. The output choices are CSV, PDF and HTML.

HEAT MAP BY RESOURCE

Based on your filters, this report displays a heat map by resource. The cells highlighted in green indicate that the resource is under-utilized, and cells highlighted in red indicate that the resource is overbooked. The output choices are HTML and CSV.

HEAT MAP BY ROLE

Based on your filters, this report displays a heat map by resource roles. From the Filter tab, you must choose an Initiative before running this report. The output choice is HTML.

The total capacity at the role level only indicates *potential* capacity. The capacity is counted more than once if a resource has multiple roles.

HEAT MAP BY PROJECT

Based on your filters, this report displays a heat map by project. The output choice is HTML. If your report has a cell highlighted in orange, it indicates that the committed effort as a percentage of capacity for the activity is in the mid-range. If a cell is highlighted in red, it indicates that the activity's planned utilization is very high; and cells highlighted in green indicate very low utilization.

HEAT MAP LEGENDS

- CP (hours)—Resource Capacity. The number of working hours per week by a resource divided by the number of working days per week. . For example: If a user works 40 hours a week, and there are 5 days in a week and there are 22 working days in a month then the capacity for the resource is for that month is 40/5* 22= 176 hours.
  Resource capacity is fixed and the number of work days in EnterpriseTrack is fixed at 5. General calendar holidays and non-working days do not affect resource capacity.

- RQ (hours)—Pending/unapproved requested effort for a resource. It is the sum of the demand for a role or resource in the form of allocations from projects.
- CM (hours)—Approved/committed effort for a resource. When Requested Effort (RQ) is approved it becomes Committed Effort and RQ can be approved is full or partial. If a resource role doesn't require an approval then as soon as the effort is allocated it becomes committed effort.
- TD (hours)—Total Demand (RQ+CM). It is the sum of Requested Effort (RQ) for a role or resource and the Committed Effort (CM).
- RQ/CP (Percent)—Requested Effort as a percent of Capacity.
- CM/CP (Percent)—Committed Effort as a percent of Capacity.
- TD/C P (Percent)—Total Demand as a percent of Capacity.
- PL (hours)—The Planned Effort for a resource. The sum of an individual resource's planned effort for each assigned task for a given time period. There is no double counting. For example: If John Smith is planned to work 110 hours as a DBA and 40hrs on a Unix platform for the month of January, then the PL (Planned Effort) for John for the month of January is 110 +40 = 150. If Mary Jane also worked 100 hours as a DBA in the month of January then the PL for DBA is 110 + 100= 210.
- AC (hours)—Sum of the actual effort by a resource for a given time period. This can come from timesheets. No double counting is done when rolled up by resource or role. For example: If John Smith has worked 93 hours as a DBA and 45 hours on a Unix platform in January, then the Actual Effort (AC) for John is 93+45 = 138 hrs.
- PL/CP (Percent)—Planned Utilization.
- AC/CP (Percent)—Actual Utilization.

RESOURCE UTILIZATION CHART REPORT

Based on your filters, this report displays a heat map chart by resource. It shows the planned utilization % and the actual utilization % for all resources. The output choice is HTML.

PROJECT EFFORT CHART REPORT

Based on your filters, this report displays a project effort heat map by project. It shows the planned and the actual effort. The output choice isHTML.

HEAT MAP BY RESOURCE CSV

Based on your filters, this report displays a heat map by resource. The output choices are HTML, XLS and CSV.

TIMESHEET REPORTS

You can generate customized timesheet reports using the filter and output options.

TIMESHEET REPORT BY PROJECT

Based on your filters, this report displays timesheet reports by projects. The output choices are CSV, PDF and HTML.

If the date range is one week or less, the generated report provides a detailed view for each day of the week. If the date range is more than a week, the generated report displays a summarized view for the entire period.

TIMESHEET REPORT BY RESOURCE

Based on your filters, this report displays timesheet reports by resource. The output choices are CSV, PDF and HTML.

TIMESHEET DETAIL REPORT

This is a detailed report of timesheets. You can filter by initiative, program, project fields, resource fields and timesheet fields. The report output includes activity with assignment and project details, project time, non-project time and non-working time. The report has a Show Actual Effort Breakdown at Day Level option to report the actual effort by resource assignment at a daily level or it can be aggregated for a requested time period. The output choices are CSV, PDF, and HTML with compression.

You can export the data generated by this report to Microsoft Excel to view the Plan versus Actual data and the cost across various dimensions. You can use Excel to format the data, group rows and columns, aggregate by quarters, years, or by fiscal period.

The Total Plan Effort column in this report is an information only column and the value will be the whole plan effort at activity level. This value may be repeated when the report is run to show the breakdown at day level, in such cases care should be take not to double count the plan effort.

The cost data is shown only to users that have the required permissions to view cost information.

In general, the resource rates are picked for the rate at assignment level. For non-project time and non-working time, the standard rate at the resource level will be used.

On occasions where the resource plays more than one role in a project or an activity, the time reported from the timesheet will be equally distributed among all the roles and then costed with the respective role rate.

AD-HOC REPORTS

To access a set of pre-defined Ad-hoc Report templates, from the Top Navigation bar select **Go To → Reports → Ad-hoc**.

You can also use the Left Navigation bar to select **Reports → Ad-hoc Reports**.

MANAGING AD-HOC REPORTS

You can edit the parameters for these reports and save them for future use. You can edit the predefined templates by specify parameter values, selecting columns to be displayed and specifying the sort orders etc. You can view saved templates created by other users by changing the filter criteria.

EDITING TEMPLATES

To edit a template, click on the **[Edit]** link next to the template. Click on the tabs to modify the report and click on the **Save As…** button.

GENERAL TAB

From the **General** tab modify the name, and description. Select if you want the default output parameter to be HTML, PDF, XLS, or XML. Also select if you want to publish this report.

PARAMETERS TAB

From the **Parameters** tab, select the parameters and their values. You can choose to edit the parameter at runtime.

COLUMN SELECTION TAB

From the **Column Selection** tab, select the columns you want to display. Click on the > and < buttons to select or omit columns from the report. You can also use the **Move Up** and **Move Down** buttons to change the order of the selected columns.

COLUMN DETAILS TAB

From the **Column Details** tab, select the column name and enter a description.

SORTING TAB

From the **Sorting** tab, select the sorting order for the columns.

RUN TEST REPORT

From the **Run Test Report** tab, select the output format (HTML, PDF, XLS, or XML) and enter values for any required parameters. Click on the **Run Report** button.

COPYING TEMPLATES

To copy an existing template, click on the **[Edit]** link next to the template. Click on the tabs to modify the report and click the **Save As…** button. Enter a name and description for this report. Also, choose if you want publish this report.

SETTING FILTERS

To set filters, click on the **More Filters…** icon. Select the scope, and enter the filter criteria and click on the **Apply** button. Click the **Reset** button to reset the filters. To view the current filters click on the **Show Current Filters** link.

RUNNING AD-HOC REPORTS

To run an Ad-hoc report, do the following:

1. Select a report and click on the **[Run]** link.
2. From the **Run Ad-hoc Report** screen, select the output parameter and enter any mandatory parameters.
3. Click the **Run Report** button. The screen refreshes to display the report.

LIST OF AD-HOC REPORTS

The table below lists the pre-defined ad-hoc reports.

Report Name	Description/Purpose
Asset Listing Report	Get all the asset related information for all resources.
Charter Template	A template for charter reports.
Executive Notes Listing Template	Lists all executive notes.
Finance Validation Report Template	Display finance validation data.
Idea Template	A template for idea reports.

Report Name	Description/Purpose
Issues Listing Report	Lists issues in all projects.
Metrics Listing Report	Get all the metrics related information for all projects.
Program Template	A template for program reports.
Project & Metrics Template	This template combines project and metrics data.
Project Listing Report	Displays project details including a list of key team members.
Project Template	A template for project reports.
Charter Team Member Listing Report	Lists all charter team members.
Resource Certification Listing Report	Lists all certifications taken by resources.
Resource Template	A temple for resource reports.
Role Based Permission List	Lists all role based permissions.
Team Member Listing Report	Lists all team members.
Title Based Permission List	Display all title based permission mapping.

USER DEFINED EXCEL REPORTS

User-Defined Excel Reports (also referred to as Composite reports) combines Microsoft Excel (as a tool for creating charts, pivot tables and tabular data in a highly customer-specific format) and EnterpriseTrack (as a single location repository for all users and a source of the latest real-time data from across your entire organization on your projects and related information such as status, charters and finances). As a result, your organization can enjoy the flexibility and control of your favorite desktop tool and the data reliability and productivity of a centralized on-demand source of project and portfolio information.

For example, you can use User-Defined Excel reports if you need a Pivot Table report of Projects Finances by Organization and also display on the same page a chart of Project Finances by Time. Once you are setup with an Excel report template, you can then run the Pivot Table report as often as needed to access the updated report fed with the latest data from the system in an Excel output format.

You can create custom reports using one or more Ad-hoc templates as inputs and you can choose to output it as an XLS or as a zip file. One or more Ad-hoc report outputs can be inserted into separate sheets in Microsoft Excel. You can also view the history, email and share these reports.

CREATING USER-DEFINED REPORTS

To create User-Defined Reports, do the following:

1. Navigate to Standard Reports by selecting **Go To → Reports → Standard** from the Top Navigation bar, or select **Reports → Standard** from the Left Navigation bar.

The Manage Reports screen is displayed. From the **Tree** pane, go to the **My Report** folder and select any reports sub-folder underneath. If you don't have a sub-folder underneath the My Report folder, then you must create a sub-folder first. For example, you can create a sub-folder called *<Excel-Based Report>*. Highlight the **Excel-Based Report**, by selecting it.

You can specify any name for this sub-folder. Excel-Based Report is just an example.

2. From the **List** pane, click on the **Create User-Defined Report** button. Click on the **Selector** button next to the icon and **choose User-Defined Excel Report**.
3. From the **General** tab enter a name for the report.
4. From the **Data Source** tab, you can add, or delete one or more Ad-hoc templates or you can select any of the available Standard Report templates. The Standard Reports that are displayed are the ones that have a tabular output. Most reports do, but those that have only a PDF output are not shown in the list of available reports.

You must choose a report that does <u>*not*</u> require any parameters at run-time. The report should produce an output without setting any parameters.

It is recommended that you make a copy of the Standard Report that you want to use as a data feed into your My Reports folder. This way you can set all necessary parameters that the Standard Report may need. If you are using Ad-hoc reports, you should similarly ensure that the reports do not require any input parameters.

5. Enter a name, select a source template, and enter an Order ID. You can click on the **Add More** link to add more source templates. This name will become the name of the tab in the output Excel report

   The **Source** is where you specify the Ad-hoc or Standard report templates that will be used as the data source to feed into your Report Template. You can have several sources of Ad-hoc or Standard reports.

6. From the **Output** tab select the report format (XLS or ZIP). Select if you want to edit the parameters during runtime.

7. Click the **Run Report** icon to run the report.

8. You can open the report in Excel and add your own tabs. Your tabs can contain any Excel formulas, coloring, borders, text, charts, pivot tables and even Macros. These can refer to cells in the EnterpriseTrack data feed tabs.

You should not make any changes or edits to the tabs fed from EnterpriseTrack – these will be lost in a subsequent run of the report. You can however make any number of your own tabs.

These tabs can have formulas that refer to the tabs of data fed by EnterpriseTrack. In this way you can create any arbitrary Excel output you wish. Note that when you refer to data ranges in the data tabs from EnterpriseTrack, you should know that there may be fewer or more rows in each run of the report depending on the underlying data set chosen. This can often be handled by just naming the column of data as the range in the Excel formula (e.g. A: A or C: C).

9. From the **Details** tab, click on the **General** tab and upload the file you created in the previous step as the Report template.

   This template will then be populated at the next execution of the report, with the latest data.

   If you wish to change the template by modifying its appearance or any formulas, you can re-upload the modified template at any time.

10. From the **Output** tab select the report format (XLS or ZIP). Select if you want to edit the parameters during runtime.

11. Click the **Save** button, or click **Cancel** to discard your changes.

12. From the **List** tab, select the report you created and click on the **Schedule and Email** tab.

13. Select the run type (**Manual** or **Scheduled**). If you select **Scheduled**, then you can choose to send emails.

14. From the **History** tab, you can view the history of this report. Click on the **Edit** icon to select how long you want to save the reports.

15. The **Sharing** tab allows you to see if this report is shared with other team members. You can also edit this tab to allow others to view your report.

16. From the **List** pane select the report you created and click on the **Run Report** icon in the **Action** column to run the report.
    When the report is run, EnterpriseTrack will generate the report by populating the latest data into the tabs and retaining the formatting you set up.

17. You can also set a bookmark for this Excel report – this way you can reduce the number of clicks required to run the report each time.

APPENDIX (DASHBOARD COMPONENT PROPERTIES)

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Optional Drill Down	Supported Chart Type
Project Cycle Time by Role	Cycle Time	Users	Project	Cycle Time	Project Listing Report		Bar
Resource Counts, Certifications							
Resource Certifications by Period	Certifications	Date Range	Resources			Resource Certifications Report	Bar
Resource Certifications by Org	Certifications	Organization	Resources			Resource Certifications Report	Bar

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Optional Drill Down	Supported Chart Type
Resource Count by Access Profile	User Count	Access Profile	Resources			Resource Listing Page	Pie
Metrics							
% Change In Metrics by Period	% of Metrics	Date Range	Project	Metrics	Project Listing Report		
Project Metrics Timeseries	Metric Value	Date Range	Project	Metrics		Project Basics Page	Line
Project Progress							
Project Timelines	Gantt bars	Timeline	Project	General	Choose: Project Basics Gantt, Dates		Gantt
Project Activities List	Activities		Project	General	Project Roadmap Page		Table
Project Issues List	Issues		Project	General	Project Edit Issue Page		Table

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Optional Drill Down	Supported Chart Type
My Project Timelines	Gantt bars	Timeline	Project	General	Project Basics Page		Gantt
My Project Open Activities List	Activities		Project	General	Project Roadmap Page		Table
My Project Open Issues List	Issues		Project	General	Project Edit Issue Page		Table
Alignment Nodes, Measures							
Alignment List	Alignment Nodes		Alignment		Measure List, Data and Chart		Table
Alignment-Measure Timeseries	Measure Value	Date Range	Alignment				Line
Project % Completion by Alignment	% Complete	Alignm-ent	Alignment		Project Basics Page		Bubble