ORACLE®

INSTANTIS

EnterpriseTrack

User's Guide

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LEGAL NOTICES

Oracle Instantis EnterpriseTrack 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.

TABLE OF CONTENTS

ABOUT THIS MANUAL

The *Oracle Instantis EnterpriseTrack User Guide* provides an overview of the EnterpriseTrack project and portfolio system. It also shows you how to use and navigate through the system.

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 are 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.

Means reader take note. Notes contain helpful suggestions and information.

RELATED DOCUMENTS

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

SYSTEM OVERVIEW

Oracle Instantis EnterpriseTrack is the leading cloud solution for of enterprise project portfolio management (EPPM) used by business process and IT leaders to improve strategy execution and financial performance. We do this by providing an end-to-end solution to manage, track, and report on enterprise Strategies, Processes, Projects, Portfolios, Resources, Costs and Benefits. Leading global corporations rely on a single system (EnterpriseTrack) to fulfill the distinctive requirements of their strategic project portfolios such as IT PPM, new product development, Enterprise PMO, and Process Improvement (Lean Six Sigma).

FUNCTIONAL OVERVIEW

The key system capabilities that span the complete project life cycle are described below:

- Plan

  Strategies. Strategy Manager enables organizations to define a hierarchical portfolio of strategic goals and initiatives and use it to drive business and IT strategy execution from the top down via aligned projects.

  Applications. Application Manager allows IT to define and track a portfolio of applications and associated usage, cost and performance metrics in order to drive application life-cycle decisions.

  Processes. Process Manager enables process owners to define hierarchical process maps, assign, roll-up and monitor process metrics and KPIs, and manage change via linked continuous improvement projects.

- Select

  Ideas. Idea Manager automates your project "suggestion box" by capturing project ideas and filtering requests leveraging an optional online portal.

  Demand. Demand Manager streamlines and standardizes in-take capture, workflow, prioritization, resource scoping and approval processing for simple and complex project work requests, proposals and/or business cases.

  Proposals. Proposal Manager enforces a standardized workflow for promoting an idea to a proposal, selecting and approving projects, ensuring alignment with strategic goals and managing stakeholder assignments.

- Mobilize

  Capacity. Capacity Manager facilitates resource optimization via "what if" scenario planning to simulate the impact of shifting, excluding or adjusting effort of proposed project plans.

  Resources. Resource Manager enhances resource pool visibility and allocation control by balancing in-bound work demand with available resource supply (i.e. time, people and money).

- Execute

  Projects. Project Manager ensures best-practice application of chosen methodologies, increases project visibility (status, issues, risks, etc.) and guides project team execution in achieving goals leveraging a flexible n-level deep WBS.

  Knowledge. Knowledge Manager streamlines project execution success and enhances work management practices by leveraging a centralized knowledge base of project best-practices, documents, tools and templates.

- Measure

  Financials. Financials Manager tracks plan vs. actual costs; top-down and bottom-up project budgeting; and capitalization, expense and chargeback accounting.

  Metrics. Metrics Manager tracks and rolls-up non-financial performance indicators such as defects, service levels, trouble tickets, or any other user-defined operational metric of choice.

  Surveys. Survey Manager gathers feedback on-demand from key internal customers and stakeholders with simple online surveys and polls.

INITIATIVES

You can use the EnterpriseTrack system, enterprise-wide and within divisions/functions/business units to manage the complete lifecycle of projects and programs based on different styles of managing project portfolios. For example, you can use the system to manage IT projects, track Six Sigma program process improvement projects, support enterprise PMOs, and manage new product development programs or strategic business projects. We refer to each of these project communities as different Initiatives.

EnterpriseTrack provides many options to configure the modules and their specific functions tailored to each initiative. You can treat each initiative as an independent unit within the system with its own set of project roadmaps, fields, team structures, workflow, financial models, business rules, reports etc.

EnterpriseTrack can house multiple different initiatives in a single deployment to enable cross initiative co-ordination and aggregation of strategic alignment, resource utilization, financial impact and reporting. Based on your requirements, your system has been configured for one or more initiatives.

System Access Profiles and Project Roles

EnterpriseTrack allows you to log in with different privileges based on your System Access Profile and Project Role. The term System Access Profile is also referred to in this document as Title. This term is configurable and your deployment may have used a different term.

System Access Profile is associated with permissions in the system outside the context of a project. Each user is assigned a single System Access Profile. Each System Access Profile is provided a set of permissions to access and/or change various entities in the system that lie outside of any particular Project (example: create ideas, create strategy nodes, view certain reports etc.).

A Role is associated with the function a user plays on a given project. Each user may have many different roles on each project that they are associated with. Each Role comes with a set of permissions to perform various activities within the context of a project (example edit activities, close phases, upload project documents etc.). Each System Access Profile also has permissions that allow you to perform functions across all projects, even if you do not play any role on the project.

System Administrators will typically have all allowed privileges for one or more initiatives independent of the System Access Profile or Role.

Based on your permissions you may be allowed to perform only certain project functions and the screens on your system may look different.

Navigation and Menu System

Login to EnterpriseTrack using the account your System Administrator or Oracle has set up for you.

The menu system consists of an Application Level Menu, a Module Level Menu, a Page Level menu and an Item Level Menu The menu system allows you to easily navigate and perform functions within the application. Common functions are grouped together throughout the application.

The Application Level Menu appears in the Top Navigation Bar of the page and provides access to all major modules and components of EnterpriseTrack When you are in a specific module of the application, specifically within a particular Idea, Proposal or Project, a Module Level menu appears within the Top Navigation bar and provides access to the commonly used functions within that particular Idea, Proposal or Project. Each page within a module has a Page Level menu that appears within the page. This Page Level menu provides access to functions that are relevant only to that page. The Item Level menu appears in lists of items like Activities on the Roadmap page. The Item Level Menu provides actions specific to the item (e.g. Activity) in that row.

The specific elements you might see in any menu are controlled by feature settings in the system and by permissions that are specific only to you. For example, if your system is not configured for Strategies, you will not see Strategies in the Top Level Menu under **Go To**. If you do not have permissions to create a Project Note you will not see that item in the Project Module Menu.

THE TOP NAVIGATION BAR

The Top Navigation bar is active when you log into the system. It contains the Application Level menu and depending on the context, a Module Level menu.

- The **Home** button takes you to your default home page. When the Left Navigation bar is hidden, it is displayed on the blue banner. When the Left Navigation bar is displayed, the **Home** button is displayed on the Left Navigation bar.
- The **Go To** menu provides access to all major modules within the EnterpriseTrack system. The items displayed in this menu depend on the features enabled for your deployment and your permissions.
- The **Create** menu displays menu options to create a new project, proposal, idea, program, resource or message, etc.
- From the **My EnterpriseTrack** (terminology is configurable) menu you can view all your open action items on Projects, Proposals, Ideas, Timesheets etc. You can also view your profile, messages, certifications, permissions, preferences and passwords.
- The **View** menu allows you to display toolbars at the Top banner, and Left Navigation bar. You can also save your settings.
- In the text box **Type Project ID or name**, you can type the Project ID or any part of the name and as you type, the system gives you project choices that match the ID or name you are typing.
- The **Advanced Search** menu gives you different ways for searching the system. You can search on projects, proposals, documents, etc.
- From the **Help** menu, you can launch the online help in a new window or send a feedback by selecting the Feedback option, or launch UPK.

- Click on the **Logout** button at any time to log out. The system warns you if you have been inactive for a long period and keeps you logged-in if you want to continue to use the application.

When you navigate to a project from anywhere, the default landing page of the project is displayed. This page is configured on a per-Role basis by your Administrator.

THE 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.

You will see a similar navigation menu on the left wherever you are in the application. The list of menu items displayed depends on the features enabled for your deployment and your permissions.

As you drag the mouse over these items, you will see the clickable items change color. Current selections are always highlighted. Clicking on any of these options typically takes you to a listing page with summary information. From the listing page you can further drill down to get more details. For example, the **Projects** tab will take you to a listing of all the projects that you are associated with in some capacity (i.e., you could be playing any role on the project). The listings on the page appear separated by the initiative they belong to.

Use the button on top of the Left Navigation bar to expand and collapse the Left Navigation bar to shows icons and text or just icons.

MODULE LEVEL MENUS

When you click into a specific Idea, Proposal, or Project the Module Level Menu is shown as the rightmost item on the left part of the Top Navigation bar. The specific item (Idea, Proposal etc.) with its item number is shown in the menu. The following screens are samples of the **Idea**, **Proposal** and the **Project** module menu.

IDEA MODULE MENU

From the **Idea** module menu, you can do the following for this particular idea:

- Create a document or an aligned strategy, scorecard, or process.
- Edit details or assign owners.
- Delete the idea.
- Perform workflow actions that move the idea to the next stage in its workflow.

PROPOSAL MODULE MENU

The above screenshot is an example of configuration in EnterpriseTrack, where the word Pre-Project has been chosen for the Proposal.

From the **Proposal** module menu you can do the following for the selected proposal:

- Go to pre-project versions.
- Create documents, linked projects, strategy, process, scorecard, non-WBS items(change requests, discussions, and risks and portfolio metrics, notes, status reports, team members, finance snapshots, strategies,
- Edit various specifics of this proposal: details, classification, resources, organization, alignment, project justification, finances/currency, dates/durations, evaluation, confidentiality, documents, linked projects, custom fields, and signoffs.
- Delete and copy Proposals/Charters.
- Save as a PDF file.
- Perform workflow actions. The available actions are specific to the current state of the proposal and to the configured workflow for your system. These can include manage team signoffs, reject or hold Proposals/Charters.

PROJECT MODULE MENU

Specific elements shown in the menu are configuration and permission dependent. You will likely see a subset of the elements listed here.

From the **Project** module menu you can do the following:

- Navigate to various pages of the project: the project basics, dates, project plan, documents and finances, issues, linked projects, sample templates, notes, reports, settings, alignment, resources, change requests, discussions, risks, QA plan, and the associated pre-project.
- Create various objects associated to the project: documents, issues, linked projects, non-WBS items (change requests, discussions, and risks), metrics, notes, status reports, team members, finance snapshots, strategy, and portfolios.
- Edit the various objects associated to the project: basic details, classification, organization, confidentiality, project justification, start dates, project dates, shift plan dates, initial finances/currency, finance settings, keywords, and custom fields.
- Export to MS Excel, MS PowerPoint, and MS Project.
- Delete, copy, cancel and hold projects.

- Close phase and change the project plan.

PAGE LEVEL MENUS

ACTIONS ON A PAGE

The Page Level Menu typically shows the actions that can be taken on the item(s) shown on that page.

TOOLBARS

On pages that show lists of objects like the Project Listing, Proposal Listing, Resource Listing, and Project Plan pages there are two ways to perform actions on the list. One is by using a toolbar that shows icons for various actions – this provides a quick access to common functions for the experienced user. The other is by using the pull-down Page Level Menus on the right side of the page.

You can turn off toolbars to reduce visual clutter. All functions in the Toolbar are also available in the Page Level Menus. Use the **View** menu to turn on or off the toolbar. Select **Display Print-Data Toolbar** from the **View** menu (**View → Toolbar →Display Print-Data Toolbar**). In some pages there are multiple separate toolbars, each of them can be turned on or off in a similar manner.

All page level actions are always available in the **Page Level** Menu.

ITEM LEVEL MENUS

On **Roadmap** (Work Breakdown Structure) pages that shows a list of project Activities (tasks), there is an **Actions** menu in each line. The purpose of this menu is to provide actions specific to that particular Activity (task).

FILTERS OR ADVANCED SEARCH

All through the system, you can use the **[More Filters…]** or **Advanced Search…** link to change the filter criteria to view specific items (e.g., view all projects instead of just the ones you are associated with, or view projects by division, etc.). You can reset filters to the default values from the **Adjust Filters** screen for Idea, Proposal and Project listing screens.

On some listing screens current filters are displayed. You can expand the **Show Current Search Criteria** section using the ⊞ icon or collapse it using the ⊟ icon.

VIEW SETTINGS AND PERSISTENCE

You can control the views of various aspects of the screen to show or hide elements such as:

- Left Navigation (Icons and/or Text)
- Top Banner (showing logo and user name)
- Toolbars (above lists of projects, work breakdown structure etc.)
- Column selection (on project lists, work breakdown structure etc.)

You can set the view settings just for this log-in session. Every **View** menu also comes with a **Save View Settings** option that allows you to save your settings for the next log-in. Administrators can also use this to save settings for users belonging to a particular System Access Profile or for all users of the system globally.

USING FRACTIONAL DURATION

You can enter duration in decimal numbers in EnterpriseTrack. Please note the following conditions when using fractional duration.

- Fractional duration or effort is retained in the system as long the start and completion dates are not changed. If these dates are modified, the duration is changed to a whole number based on the start and completion dates. You can re-enter the fractional duration.
- When partial duration or effort is entered for activities that are sequential, EnterpriseTrack does not use the fractional duration when showing the start and end dates for those activities. For example, if the first activity (Activity 1) takes 2.5 days to complete from November 1st, the start date for the second activity (Activity 2) will be shown as November 4th and not November 3rd.
- When activity dates are changed from the Project Dates page, EnterpriseTrack does not retain the partial duration. The duration is rounded off to the nearest whole number.

MY ENTERPRISETRACK

MY WORK

As soon as you log in to the EnterpriseTrack system, you see the default landing page configured for your System Access Profile. In most cases the default might be set to **My Work** page. This page lists all the work items that you are associated with. Clicking on any displayed item that is underlined allows you to go to the detail page behind that work item.

The **My Work** page has the following sections:

- Proposals/Charters

  All Proposals/Charters that you are a team member of and all proposals that you have created.

- Projects

  All projects that you are a member of and all projects that you have created.

- Task and Deliverables

  All Activities that are open and that are assigned to you.

MY MESSAGES

EnterpriseTrack users with appropriate permissions can send broadcast messages to other users in the system. You can read these messages on the **My Messages** page. You can also view any documents that are attached to messages from this page.

If a new message has been sent to you, you will be taken to the **My Message** page when you log into the system. You can also navigate to this page by selecting **My EnterpriseTrack** → **My Messages** from the Top Navigation. To delete a message on the **My Messages** page, click the **Delete** link in the **Actions** column.

MY CERTIFICATIONS

Select **My Certifications** from the My EnterpriseTrack menu to view all your certificates.

MY PERMISSIONS

When you are using the system, you may find that a particular function or page is not visible to you. This is often because you do not have the permissions to perform the function. You can see what permissions you have and the total set of permission controls from the **My Permissions** page.

Your permissions are a combination of Role based permissions (the role you play in each project) and by a System Access Profile based permissions for non-project objects and in all projects based on the (one) System Access Profile you belong to.

To view your permissions, select **My Permissions** from the **My EnterpriseTrack** menu.

MY CALENDAR

Your calendar is based on a Reference Calendar that is set by your Administrator or Project Manager. All exceptions (working and non-working) set in the Reference Calendar are automatically applied to your calendar. Calendar exceptions are used to mark your vacations or your extra work days.

Viewing your Calendar

- Navigate to **My EnterpriseTrack** > **My Calendar**. Use the tabs to view the calendar for a specific month or year.

Modifying Work Hours or Work Days

To modify your works hours or work days:

1. Navigate to **My EnterpriseTrack** > **My Calendar**. The *Edit Resource Calendar* page is displayed.
2. Click the **Edit** button.
3. Enter the number of hours you can work.
4. Click to select your work days.
5. Click **Save**.

You must have the **Edit My Resource Calendar** permission to edit your calendar.

Adding Exceptions

To add a calendar exception:

1. Navigate to **My EnterpriseTrack** > **My Calendar**. The *Edit Resource Calendar* page is displayed.
2. Select a date by clicking on it. You can use the tabs to navigate to a different month or year. The *Manage Exceptions* pop-up window displays.
3. Enter a name for this exception.
4. Select if you want to set it as a working day or a non-working day.
5. Click **Save**.

You must have the **Edit My Resource Calendar** permission to add calendar exceptions.

Deleting Exceptions

To delete a calendar exception:

1. Navigate to **My EnterpriseTrack** > **My Calendar**. The *Edit Resource Calendar* page is displayed.
2. Click on the exception to select it. The *Manage Exception* pop-up window is displayed.

3. Click **Delete**.

You must have the **Edit My Resource Calendar** permission to delete calendar exceptions.

MY PROFILE

Select **My Profile** from **My EnterpriseTrack** menu to make changes to your own profile (Login Name, email address, etc.).

MY PREFERENCES

Select **My Preferences** to view all your preferences.

You can use the *Edit Resource Preferences* to modify the following settings: date format, date separator, UI skin, MS Office version, and language. You can also select the Use Browser language for EnterpriseTrack to use the language set in your browser.

To modify your preferences:

1. Navigate to **My EnterpriseTrack** > **My Preferences**. The *Edit Resource Preferences* screen is displayed.
2. Select your preferences.
3. Click **Update**.

- You can use the *Use Browser Language* check box to make the language displayed by EnterpriseTrack match your browser's language setting. When the *Use Browser Language* check box is not selected, EnterpriseTrack is displayed in the language selected in the Language drop-down list.
- The language selected in the *Language* drop-down list also determines the language of system-generated emails.

MY PASSWORD

Select **My Password** from the **My EnterpriseTrack** menu to change your user password.

PROJECT LIFECYCLE

Projects can be created in EnterpriseTrack either in a one-step process (see Quick Projects) or through a more elaborate workflow that comprises a sophisticated evolution of ideas becoming projects.

It is useful to become familiar with this lifecycle as well as with some of the terminology used, to fully appreciate the functionality and capabilities of the product. This section briefly describes the evolution of an Idea into a Proposal, and then of a Proposal into a Project. You may choose to skim this and come back to it for a second read.

IDEAS TO PROPOSALS/CHARTERS

Ideas for new projects/initiatives created by users go through the following phases: Idea Creation → Received by Router → Assignment of Owner → Promotion of Idea to Proposal/Rejection of Idea.

The table below shows this evolution in more detail.

Idea Status	Description	Possible Next Actions
New	• Idea is submitted by a user using the idea creation screen in the EnterpriseTrack system or submitted by someone using the Idea Portal. • Based on configured business rules, the idea is routed to a Router. • If the business rules configured do not route the idea to a specific router, by default the idea is routed to the system Administrator. • At this stage, the idea has a router but no owner. The router would review the idea and based on the context of the idea, route it an owner. The router may choose to reject the idea. • The idea is displayed in the My Work screen of the Router.	• Assign Owner • Reject Idea

Idea Status	Description	Possible Next Actions
Owner Assigned	• The idea is displayed in the My Work screen of the Owner. • At this stage, the idea has an owner. The owner is responsible for evaluating the idea by collecting required information and entering information in the idea evaluation matrix. • If the idea meets evaluation thresholds specified for the business, then the owner can create a Proposal. • If the idea does not meet evaluation thresholds specified for the business, then the owner can reject the idea.	• Create Proposal • Reject Idea • Change Owner
Proposal Created	• Owner evaluated the idea and created a proposal. • No further actions are required on the idea.	None
Rejected	• Owner evaluated the idea and rejected it. • No further actions are required on the idea.	None

An accepted idea results in a new proposal. Users can also create new Proposals/Charters directly through the user interface.

PROPOSALS/CHARTERS TO PROJECTS

Proposals/Charters go through the following phases: Proposal Creation (potentially from an idea) → Project Manager Assignment → Completion of Proposal Details → Proposal Approval/Rejection → Project Creation.

Once a Project Manager has been assigned and required proposal entries are filled in, Proposals/Charters await approval. If the proposal is not satisfactory, it can be rejected. Once a proposal is approved and a project is ready to be launched, a user with appropriate permissions can create a project. In addition to the information captured during the proposal evaluation phase, more data is typically required to promote Proposals/Charters to projects.

Proposal signoffs and approvals are optional. For your deployment signoffs and approvals might be turned off. In that case user with appropriate permissions can create a project whenever the proposal is ready.

The table below shows this evolution in more detail.

Proposal Status	Description	Possible Next Actions

Proposal Status	Description	Possible Next Actions
New	• New proposal has been created either by promoting an existing idea or by creating a new proposal without an existing idea. • At this stage, a project manager needs to be assigned. • The proposal is displayed in the My Work screen of the proposal creator.	• Edit Details • Assign Required Team Members • Reject Proposal • Hold Proposal • Delete Proposal • Copy Proposal
Team Assigned	• The proposal is displayed in the My Work screen of the proposal creator and the project manager. When the project manager selects team members, the proposal is displayed in the My Work screen for all team members. • The project manager is responsible for evaluating the idea by collecting required information and entering information in the proposal evaluation matrix. • The project manager is also required to complete proposal details, assign initial team, estimated duration for various phases, before a proposal can be approved. • If the proposal meets evaluation thresholds specified for the business, then the proposal can be moved to the next step. • Project manager can request signoffs from team members before moving the proposal to the next step. • A user with appropriate permissions can approve the proposal and accept the proposal to create a project. • If the proposal does not meet evaluation thresholds specified for the business, then a user with permissions to edit Proposals/Charters can reject the proposal. • Proposals/Charters can be put on hold for unlimited duration.	• Edit Details • Approve Proposal or Accept Proposal and Create Project • Reject Proposal • Hold Proposal • Delete Proposal • Copy Proposal

Proposal Status	Description	Possible Next Actions
Approved (Optional Step)	• The proposal is displayed in the My Work screen of the creator, project manager and all team members. • A user with approve proposal permissions has approved the Proposal. • A user with create project permissions will need to create a project from the approved proposal. • Only users with permissions are allowed to edit Proposals/Charters in the approved state.	• Accept Proposal and Create Project • Reject • Reopen • Delete • Copy
Project Created	• A user with create project permissions has created a project. • No further actions are required on the proposal.	• Copy
Rejected	• Proposal was evaluated and rejected. • No further actions are required on the proposal.	None
On Hold	• Proposal has been put on hold indefinitely. User action is required to remove it from this status.	• Remove Hold • Edit Details • Copy • Delete

PROJECTS

Projects go through different phases in their lifecycle.

The table below explains the possible stages of a project.

Project Status	Description
Active	• Project is actively being worked on, and is in one of the phases before Realization.
On Hold	• Project is not actively being worked on and has been put on hold. Project may be put on hold temporarily. If a project is to be abandoned completely, it should be marked Void.
Closed - In Realization	• Project is in Realization.

Project Status	Description
Completed – Post Realization	• Association of the project with the initiative (e.g. for the purposes of financials etc.) is over as of the Completed date. Project is available as an archive.
Void	• Project has been cancelled.

Each project is based on a project plan (roadmap). The term project plan is configurable and your deployment may use the terms like methodology or project method instead of project plan or roadmap. A project plan is made of ordered set of phases, each phase consists of ordered set of deliverables, and optionally, deliverables can be comprised of an ordered set of tasks.

IDEAS, PROPOSALS/CHARTERS AND PROJECTS

One of the first things you will want to try with the new system is creating ideas, promoting them to Proposals/Charters, approving Proposals/Charters and creating projects. Projects can also be created by using the Quick Project option that bypasses this workflow. This is explained in the section *Quick Projects*. Typically anyone in a company can create or submit new ideas, but only people with appropriate privileges can create Proposals/Charters and projects.

CREATING IDEAS AND PROMOTING THEM TO PROPOSALS/CHARTERS

Select **Go To → Ideas** from the Top Navigation Bar to see a listing of ideas associated with you. Click on the **Create a New Idea** button to begin creating a new idea.

Enter the required information and click the **Create Idea** button. You can also attach documents to the idea. The new idea will be displayed in the **Ideas** screen as a new idea.

If you have permissions, then you can route ideas by clicking on the **Edit Idea** button and selecting an idea owner from the **Edit Idea** screen. You can also click on an idea from the **Ideas** page to put in in the edit mode. You can select an owner from the drop-down menu and click the **Save** button in the **Ideas** page.

In some systems, ideas may need to be approved before Proposals/Charters can be created for them. Users with approval privileges can approve or reject ideas. When an idea is rejected, the system sends an email to the user who submitted the idea. Based on permissions, rejected ideas may be re-opened.

If you have permissions to create Proposals/Charters, from the **Action** menu on the **Ideas** page**,** select **Workflow** > **Accept Idea and Create Proposal** to promote the idea to a proposal. To reject an idea, from the **Action menu** select **Workflow** > **Reject** to reject the idea.

If there are any user-defined custom fields created by your Administrator they will be displayed in a separate custom fields section. Any pre-defined custom fields created during configuration will be displayed along with other standard idea fields in the appropriate section.

PROPOSALS/CHARTERS

Select **Go To → Proposals** from the Top Navigation Bar to see a list of Proposals/Charters. You can create a new proposal without requiring it to originate from a submitted idea. Create a new proposal by clicking on the **Create a New Proposal** button. The information on the **Create New Proposal** screen is grouped into seven tabs.

BASIC DETAILS

Key details are on the **Basic Details** tab. In a multi-initiative system you need to select the initiative for this new proposal. Various elements of the proposal may change based on the initiative selected. Items that are highlighted in red are required for proposal creation. Items that are highlighted in orange are required to promote a proposal to project. Select the type of calendar you want to use. You can choose from 4-days a week, 7-days a week, and Standard US calendars. The options you can select are determined by your Administrator.

Enter the necessary proposal information and click the **Save** button to create a new proposal. You can edit proposal details at a later stage. If there are any user-defined custom fields created by your Administrator they will be displayed in a separate custom fields tab. Any pre-defined custom fields created during configuration will be displayed along with other standard proposal fields in the appropriate proposal section.

Choose an appropriate project type and roadmap. Then choose the right team from personnel with roles available to serve on the project. While making selections in pull down menus, the screen will refresh if there are any dependencies. For example the choice of project plans may change based on the project type selection. The screen will refresh to display the right choices for dependent fields.

Note the filters that are available for selecting project team personnel based on various selection criteria. The status changes to Team Assigned once you assign required team members.

If your role allows you to edit proposal details, click on **Edit Details** and fill in the fields as appropriate. If you do not have permissions to edit proposals/charters and create projects, the **Edit Proposal**, **Approval & Lock**, **Accept Proposal & Create Project** buttons will not be visible to you. You can also click on a proposal from the **Proposals** page to put it in edit mode.

From the **Proposals** listing page, you can also easily edit details, attach documents, link projects, and update evaluation scores from within the **Proposals** listing page using the **Actions** menu.

If **Enable Versioning** is selected, changes made to the proposal are stored for future reference. Click on the **View Proposal Versions** link to see the list of revisions. On the **Proposal Revision History** screen click on an individual revision to view revision details.

FINANCIALS

You can specify the project currency. By default it will be set to the default currency. You can select any other currency clicking on the currency drop down. All project finances will be stored in the currency specified. Monthly currency conversion rates can be managed by a user with appropriate permissions using the finance administration screens.

DATES/DURATIONS

You can specify project start and planned close dates from the **Dates/Durations** tab. If you change the start date or phase durations, the Projected Close Date is calculated. If you click on the **Apply** link, the calculated date will be populated in the **Projected Close Date** field. You can manually enter or override the Projected Close Date instead of using the calculated date.

CONFIDENTIALITY

From the **Confidentiality** tab, you can indicate the project to be confidential within defined boundaries. The choices are shown below.

CHOOSING INITIAL PROJECT TEAM MEMBERS

The roles and the list of available team members are determined by the initiative you choose. The roles that require sign-offs are arranged towards the top of the grid. You can assign multiple team members to the same project role. You can also check the availability of team members before assigning them to your project by selecting the **Check Availability** button.

1. For each project role, select a team member. You can use the **Filter** button to find a team member.
2. Enter the duration for which you require this team member. Choose **Entire Project** or **Specify Dates**. If you selected **Specify Dates**, then enter the start and end dates.
3. Enter the effort.
    1. Select **Percentage Utilization** and enter the percentage of a resource's time that will be spent on this project.

       Or

    2. Enter the total number of hours this resource will spend on the project.
4. You can click the **Check Availability** button to view the availability of this resource.
5. From the **Actions** column select Submit for Sign-offs.

MANAGING THE INITIAL PROJECT TEAM MEMBERS

- To delete a role click the **Delete** button.
- To edit a role click the **Edit** button.

- To add a new role, click the **Add Role** button.

If your system has been configured to use multiple currencies, you may have to choose the currency that you want to use in the project. The system will then display all the financial information in this currency.

WORKING WITH TEAM SIGNOFFS FOR PROPOSALS/CHARTERS

EnterpriseTrack allows you to build in specific sign-off requirements for proposals/charters.

If a proposal has sign-offs that are required, users will not be able to create a project for that proposal until all the required sign-offs have been acquired. To request a sign off from a team member, click the **Request Team Signoffs** button on the **Proposal Details** page. Select the appropriate check boxes and click the **Save** button. An email is sent to members and a sign off request item is delivered to their **My Work** page.

You can view the status of the sign-offs for a proposal by clicking the **Edit Team Sign Off Status** tab on the **Manage Team Signoffs** page.

ADVANCING PROPOSALS/CHARTERS TO BEGIN PROJECTS

You can view existing proposals/charters on the **Proposals Listing** screen. Use the **Advanced Search …** link to see proposals/charters by different criteria. New proposals/charters are displayed in the proposals list with **New** in the status column. Click on a specific proposal on the **Proposals** page and select **Actions** > **View Details** to view proposal details. You can edit the proposal further by selecting **Actions** > **Edit**.

You can put proposal on hold if you want to defer working on the proposal for certain duration.

Reject the proposal by clicking on the **Workflow** → **Reject**. Based on permissions, you may be able to re-open a rejected proposal.

Depending on the deployment configuration you may be able to promote a proposal to project using one-step or two-step approval workflow. For one-step workflow you can create a project by clicking on **Accept Proposal and Create Project**. In case of the two-step workflow you can create a project by clicking on the **Approve and Lock** button and then clicking on the **Accept Proposal and Create Project** button. Once a project is created for a proposal, the proposal cannot be edited.

If all the required details have been entered and the project is ready to be launched, then click on the **Accept Proposal** and **Create Project** button to create the project.

DELETING IDEAS, PROPOSALS/CHARTERS AND PROJECTS

Ideas, Proposals/Charters and Projects can be deleted by users who have the required permissions. The **Delete** button on the **Idea** details, **Proposal** details and **Project** details pages will be visible only to those users who have the appropriate permissions. An idea for which a proposal has been created cannot be deleted without deleting the proposal first. Similarly, if a project has already been created from the proposal, you will have to delete the project before you delete the proposal.

QUICK PROJECTS

In addition to the detailed project creation workflow where ideas are promoted to proposals/charters and then to projects, EnterpriseTrack also allows you to create projects in one step. You can use quick project creation to enter information for historical projects or to launch projects quickly.

To create a project quickly, from the **Project Listing** page click on the **Create** button. The **Create Quick Project** screen is displayed. Minimal information is required to launch a project. Required fields are highlighted in red. Enter the required information and click on the **Save** button.

Projects created using this screen will not have a link to an idea but will have a link to an automatically created proposal for this project. You can edit the proposal and enter the business case later.

WORKING WITH THE PROJECT LISTING PAGE

PROJECT LISTING

The **Projects** page is one of the most powerful pages in the EnterpriseTrack system and provides many useful functions. This section describes what you may see on the Project Listing page and what you can do with it. You will also learn about how create different lists of projects.

From the Top Navigation Bar select **Go To → Projects**. A list of projects is displayed. The list shows the currently set Default Saved Search. See *Saved Searches and Advanced Search* for details on how to display different lists of projects.

If a large number of projects are returned then this page is paginated and a limited number of projects are displayed on one screen. You can view projects that are not displayed by clicking on the pagination links displayed below the table. You can increase the number of records to be displayed per page by changing the setting on the **Advanced Search** page.

PROJECT LISTING CONTROLS

You will find various control options from the **(Page Level) View** and **Data** menus. You can also use the toolbar by selecting **View → Toolbar → Display Print-Data Toolbar**.

The following controls are available for you on the **Projects** page.

Icon	Description
	Allows you to save your settings.
	Reset your settings
	Allows you to print the grid. Pop ups must be disabled.
	Allows you to export the grid to a CSV file.
	Allows you personalize the grid by choosing the columns you want displayed on the Projects page.
	Allows you to set the sort order for the items listed on the page.
	Allows you to enable/disable group-by functionality.
	Allows you to enable/disable pivot functionality.

PROJECT LISTING COLUMNS

SELECT, RESIZE, ARRANGE

You can select the columns to view on the **Projects** listing page by clicking on the **Select Columns** icon or selecting **Columns** from the **View** menu. The columns that are available to you are set by your Administrator. Select the columns you want to view on the *Projects* page and click **OK**.

The columns with the icon indicate that these are computed columns. The listing page may take longer to refresh or reload if too many of these columns are selected. For best results, use the computed columns minimally and only when necessary.

You can resize columns by clicking on the edge of a column and resizing. To change the order, drag and drop the column to a new location on the page.

Once the layout is configured to your satisfaction, you can save the column order, selection and size by clicking on the **Save My Settings**  icon or select **(Page Menu) View → Save View Settings**. On subsequent logins, your saved settings are used to display the page.

STATUS INDICATOR COLUMN

Visual indication of the status and timeliness of the project is displayed in the **Status** column on the **Projects** listing page.

Active projects are displayed with color coded, numbered circles indicating timeliness of a project. At a high level, this tells you if you are in good shape with respect to project completion. Every project has a Planned Project Close Date (that the project creator entered when creating the project, and which can be changed.) The color-coded numbers in the **Status** column indicate how far away from this date you currently are. A red 1 indicates that the project is incomplete with the Planned Realization Date within a few days or past due (these rules can be configured for your system). A green 3 indicates you have sufficient time for completion. Similarly, individual late project phases will also be displayed in red in the Phase column e.g., Define.

Icons displayed for various statuses are displayed in the table below.

Status	Icon
Active – Past Due	
Active – At Risk	
Active – On Schedule	
On Hold	
Cancelled	
Closed – In Realization	
Completed – Post Realization	

PERCENT COMPLETED COLUMN

You can specify percent of work completed for a project in the project **Basics** section. Percent completed graphic is displayed on the **Projects** listing screen in the column next to **Status Indicator**. When you hold the mouse cursor over the percent completion graphic, the actual percent of work completed for the project is displayed in mouse-over text.

OTHER COLUMNS

Column Name	Description
Project Number	The Project Number.
Project Name	The name of the project.
Division	The division associated with this project.
Project Priority	The priority (High, Medium, or Low) of the project.
Phase	The current phase of the project.
%	The percentage complete.
Initial Budget	The initial budget of the project.
Total Remaining Budget	The total remaining budget.

SORTING, FILTERING

You can sort and filter the results shown on the listing pages. Note that the sorting, filtering described here will apply to the set of projects (proposals/charters, ideas etc.) that are shown by the **Saved Search** (which is the result of the Advanced Search). You can always search across all projects by first **selecting Saved Search → All Projects** in the listing, and then performing the sorting or filtering described in this section.

You can sort the columns by clicking on the up and down arrows next to the column name. For example, numeric values on the columns are sorted in ascending or descending order, and alpha-numeric characters are sorted in alphabetic order.

To view the filter row, select **(Page Menu) View → Filter Row**. Click on the box below the column name to view the various filter options.

For example, you can search for a project that begins with the word *Server* by selecting the filter option **Begins with** under the column **Project Name** and typing the word `Server` in the filter box. The display now shows all projects that begin with the word Server.

GROUP BY FUNCTIONALITY

The Group By functionality allows you to group projects by selected columns, for example, by project, status, stage/phase, organization etc. You can also use multiple grouping criteria to group projects by primary and secondary criteria; for example, you can group projects by On-time Status and Organization.

From the **Projects** page, select **(Page Menu) Data → Group By** or from the toolbar click the button to enable or disable the Group By functionality.

By default the screen loads with the **Group By** icon disabled and the **Group By Option** set to **None**. The Grouping row is displayed just below the header row. If the Filter toggle is enabled, then the filter row is displayed below the Grouping row. The Group By column is displayed under the first column.

Group By option is by default set to **None**. You can select a column for grouping and the projects are displayed grouped based on your selection. If you select **None**, then all qualifying projects are displayed ungrouped. You can also filter based on multiple criteria by selecting a project column name and dragging it next to your first filter criteria. To remove a column from grouping criteria, select and drag the column away.

Typically, text fields are enabled for grouping and numeric fields are summed for each group used for grouping. Certain fields like **Project ID** and **Project Name**, which are unique fields, are not eligible for grouping.

PIVOT FUNCTIONALITY

The Pivot functionality allows you to summarize project data using grouping criteria along two dimensions. You can select project fields for rows, columns, and a project field to compute sum or count for data cells in the pivot tables.

From the **Projects** page, select **(Page Menu) Data → Pivot** or from the toolbar click the button to enable or disable the Pivot functionality.

The table options are displayed above the project fields. To display a pivot table, select the rows, columns and data for your table by dragging and dropping project column field names (for example Project Status). You can remove a field by selecting and dragging it away. If the field selected for summarizing (Data field) is numeric then Sum and Count operations are allowed. If the summarizing (Data field) is text, only the count operation is allowed.

The pivot tables are displayed in a new window.

SAVED SEARCHES AND ADVANCED SEARCH

The **Projects**, **Proposals** or the **Resources** listing page views display the results returned by a search. To view the current search settings, click on **View Current Search Criteria** from the **Manage** pull-down menu.

MANAGING SAVED SEARCHES

The **Saved Search: View** drop-down menu allows you to view your saved searches. You can use the predefined **My Projects** and **All Projects** or create your own by modifying the current search criteria.

From the **Manage** pull-down menu, select **Create** to add a new search, or select **Edit** to modify an existing search. Assign a filter name and description and also choose if you want to select this search as a default search.

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.

ADVANCED SEARCH

The **Advanced Search…** link on the top right corner of the screen allows you to perform more refined searches using any of the 140 search filters. You can use the advanced search to search the database on various categories including attached documents or notes. You can also save your searches to use later.

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.

TEXT SEARCH WITHIN PROJECTS

You can perform text searches from the **Advanced Search** screen or use the **Search** (within listed projects) box on the **Projects** page. The system searches through all relevant entries, including documents to display the search results.

For example, to search for a project with the word *Test*, type the word `Test` in the **Search** (within listed projects) box. The system searches through the **Projects** page and displays projects with the word Test in it.

WORKING WITH PROJECT DETAILS

NAVIGATING WITHIN A PROJECT

LEFT NAVIGATION

When you click on a project on the **Projects** listing page and your Left Navigation is visible, the left navigation bar expands into a sub-menu under **Projects** to include several new choices. You can expand or collapse the sub-menu by clicking on the toggle button.

The menu choices are listed in alphabetical order and are described in the following sub-sections.

Some menu item names are configurable. The names for your deployment may be different. E.g. Metrics could be renamed to KPIs or Strategic Alignment might be renamed to Target Alignment, etc.

PROJECT MODULE MENU

The **Project Module** Menu is the right most menu on the Top Navigation Bar when you are within a project. The **Project Module** Menu provides all the navigation capability of the Left Navigation Bar shown above. In addition, it provides easy navigation to many actions you may perform on a project. To navigate use **Project Module Menu (Project #) → Go To**.

Oracle recommends that you become familiar with this menu to ease your navigation and reduce clicks when working with a project.

SENDING EMAILS TO TEAM MEMBERS

You can send emails to your team members from within EnterpriseTrack.

To send an email to team members:

1. From the Project Module menu select **(Project #) → Send Email**.
2. Enter an email address or select from the options and click **To**.
3. Click **CC** and **BCC** fields to enter or select email addresses.
4. You can attach files to your email by typing in the complete path to the file or by using the **Browse** button to locate your file.
5. Click the **Send Email** button.

PROJECT BASICS

The **Project Basics** page displays summary information about the project, proposal statement and notes, financials, dates and custom fields if any. To access the **Project Basics**, from the **Project Module Menu (Project #) → Go To → Basics**. Depending on your permissions you may see the **Edit** button for some of the sections. By clicking on the **Edit** button you can edit the data for the given section. Choose a calendar for this project. You can choose a calendar that is specific to your organization, country, or company. For example, depending on your project needs and the calendars set up by your Administrator, you can choose 8x5 (Monday to Friday) calendar, or 7x6 (Monday to Saturday) calendar, or 8x5 (Sunday to Thursday) calendar. The calendar choices are determined by your Administrator. The calendar is used by the system to determine the Plan Start and Completion Dates for activities.

PROJECT CURRENCY

You can change the project currency after project creation. Finances entered for the project can be converted to the new currency by applying the conversion rates from old to new currency.

PROBLEM STATEMENT GENERATOR WIZARD

EnterpriseTrack can help you to create a well-articulated problem or objective statement. In the **Statements and Notes** section of a proposal or project, certain fields may appear with the **Wizard** link next to them. Click this link to launch the statement generator wizard.

Type your answer to each question posed by the wizard in the appropriate field. Be as specific as you can and let the sample answer guide you as you type. Scroll to the bottom of the page. The top field e.g. Generated Opportunity or Problem Statement field will display the statement.

Click the **Copy** button to copy it to the bottom field for editing. To use the statement, click the **Apply** button.

PROJECT DATES

The Dates screen consolidates various project dates on one screen. To access the **Project Dates**, select from the **Project Module** Menu **(Project #) → Go To → Dates**. Project dates, phase dates, finance dates and project hold dates are displayed on this page. Initial Planned, Current Planned, Actual dates, and the On-time Traffic Light are displayed in the chart at the top of the page.

The **Actual Cycle Time** is an optional flag that is set for each initiative. The **Actual Cycle Time** for projects is the sum of the cycle time for all phases of the project. The Actual Cycle Time for completed phases is the Actual Start Date minus any hold duration for this phase. You can click on the phases/stages for detailed information.

You can change the Project start date by clicking on the **Edit → Start Date**. Project close date and phase dates can be edited by clicking **Edit → Project Dates**. You can adjust planning dates adjusted to match the actual schedule for the project by clicking on the **Edit → Shift Planned Dates**.

Finance dates are updated when project manager, finance representative or global finance administrator make changes either on the project finance page or on the finance administration page.

You cannot edit **On Hold** dates. They are set when the project is put on hold or taken off hold.

EDIT PROJECT DATES

You can edit project dates by clicking on **Edit → Project Dates**. You can edit the **Planned Project Close Date** and **Phase Dates** from this screen. When you change a date that has dependencies, a suggested date is calculated based by evaluating various dependencies. You can view the suggested date can by holding the mouse over the icon. If you click on the icon the date is inserted in the date field on the left.

EDIT PROJECT START DATE

You can edit project start date by clicking on the **Edit → Start Date**. When you change the start date, you can shift the due dates of the phases, deliverables and tasks by the number of days the start date is shifted. You can also manipulate the financial data based on the options displayed below.

SHIFT PLANNED DATES

You can select **Edit → Shift Planned Dates** to adjust future planning dates based on actual completion of initial phases of a project. If a project is ahead of the current schedule by a month then the current planning dates can be pulled in by one month by selecting **Edit → Shift Planned Dates**.

PROJECT DOCUMENTS

You can quickly access project specific documents by selecting **Project Module Menu (Project #) → Go To → Documents**. You can also click on the **Documents** link under in the **Projects** sub-menu on the Left Navigation Bar. You can attach documents to deliverables, tasks, issues, metrics, etc. The **Attached To** column displays the activity that this document is attached to. You can view the document by clicking on the document link in the **File Name/URL** column.

You can view/edit document details by clicking on the hyperlink under the **Name** column. You can view older versions of this document by clicking on the **View Revision History** link. You can mark a document read only by clicking on the **Read-Only Document** checkbox. No further changes to this document will be allowed. Only users with a special permission who can update read only documents will be able to can make changes to this document. You can make any document that you add to a project a best practice document by selecting the check box.

Documents can also be made confidential. If you specify that a document is confidential, you must also choose the list of users who are allowed to view the document.

Based on your deployment configuration, your administrator might set a restriction on document size. If the uploaded document is larger than the allowed document size, then an error message will be displayed and the document will not be uploaded.

PROJECT RESOURCES

Navigate to **Project Resources** using the **Project Module Menu (Project #) → Go To → Resources**.

ASSIGNING RESOURCES TO A PROJECT

The term resource, within EnterpriseTrack, refers to a person or equipment. The resource you assign to your project must already be part of your company's resource pool. In the Project Role field you can specify if the resource is an external team member or equipment. External team members can receive email notifications but cannot log into the system.

You can view the Available Free Capacity for a resource from the Allocation Review section. This section is updated based on the dates, duration and the required effort you select. If it is highlighted in red, then this resource is over-booked for the selected time period; if it is highlighted green, then this resource is available for the selected time period. You can also view all committed allocations for this resource by clicking the link Previously Committed Capacity.

The fields and options you see are based on the project initiative you selected and on the settings set by your Administrator.

The system currency is the default currency.

To assign a resource to your project:

1. Navigate to the **Project Resources** page **(Project #)> Go To> Resources > Listing** or click the **Resources** link on the Left Navigation Bar within a particular project.
2. From the **Create** menu select **Team Member**. The Add a Team Member screen is displayed.
3. Select a role from the drop-down list.
4. If you selected **Team Member External**, enter the first name, last name and email address.
5. Select a resource from the drop-down list.
6. Select the duration.
    1. Choose **Entire Project**, or **Partial Project**.
    2. If you select **Partial Project**, click the **Calendar** icon to select the start and end dates.
7. Specify the effort/utilization for this resource. You can choose from the following options:
    1. Select **Percentage Utilization** and enter the percentage of the resource's time that will be spent on this project.
    2. Select **Plan Effort (0)** if you want to plan the effort for each week. Click the **Add** button to display the Add Efforts screen. Enter the number of hours for each week and click the **Add Efforts** button.

3. Select **Plan Effort Total** if you want to enter the total number of hours you will require from this resource.

8. Choose if you want to use the **Resource Rate** or the **Role Rate**.
9. Select **Override Labor Rate** only if you want to overwrite the current labor rate for this resource.
   1. Click the **Calendar** icon and select the effective start date.
   2. Enter the Standard Labor Rate (per hour).
   3. Enter the Overtime Labor Rate (per hour).
   4. Enter the Setup Labor Rate.

You must have the **Override Team Member Rate** permission to override the current labor rates.

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10. Enter the time this resource will spend on various project related tasks (Project Management, Team Meetings, etc.).
11. Click the **Create** button.

EDIT TEAM MEMBER INFORMATION

You can use the *Edit Team Member Info* screen to change the resource currently assigned to a role and to override the current labor rate.

You must have the **Modify Team Member Rate** and **Override Team Member Rate** permissions to modify the current labor rates.

To edit a team member's information:

1. Navigate to the **Project Resources** page **(Project #)> Go To> Resources > Listing** or click the **Resources** link on the Left Navigation Bar within a particular project.
2. Locate the resource you want to edit and select **Actions> Edit**. The Edit Team Member Info screen is displayed.
3. Select a resource from the Possible Choices pull-down menu.
4. Select **Override Labor Rate** only if you want to overwrite the current labor rate for this resource.
   1. Click the **Calendar** icon to change the effective start date. Edit the standard, overtime, or setup labor rates.
      Or

   2. Click the **[Add Row]** link to add a new row. Click the **Calendar** icon to select the effective start date. Enter the standard, overtime, and setup labor rates.

5. Click the **Update** button.

REQUEST FOR RESOURCE ALLOCATION

You can request resource allocation for a project during the proposal or the project execution stage. When you create a resource allocation request, you can select the duration and the role of the resource. The resource allocation request is then routed for approval as some roles may require approval before staffing. The status of all resource allocation requests are displayed on the **Project Resources** page under **Resource Plan**.

To add a resource allocation, from the **Project Resource** page, click on the **Resource Plan** tab. From the **Create** menu, select **Allocation** to add a new allocation request. You can also use the **Actions** drop down menu to add, edit, submit, delete, withdraw, release, or reopen a resource allocation.

CREATE REQUEST FOR RESOURCE ALLOCATION

You can create allocation requests for resources already on your project team. Based on the dates and duration you selected, the *Allocation Review* section shows the impact this allocation will have on the resource.

When you submit the allocation request, it is sent for approval. You can view the status from the **Resource Plan** tab on the *Project Resources* page.

The fields and options you see are based on the project initiative you selected and on the settings set by your Administrator.

The system currency is the default currency.

To create an allocation request:

1. Navigate to the **Project Resources** page **(Project #)> Go To> Resources > Planning** or click the **Resources** link on the Left Navigation Bar within a particular project and select the **Resource Plan** tab.
2. From the **Create** menu select **Allocation**, or from the **Actions** menu select **Add Allocation**. The *Create Request For Resource Allocation* page is displayed.
3. Select a role from the drop-down list.
4. Select the duration.
   1. Choose **Entire Project**, or **Partial Project**.
   2. If you select **Partial Project**, click the **Calendar** icon to select the start and end dates.
5. Specify the effort/utilization for this resource. You can choose from the following options:

   1. Select **Percentage Utilization** and enter the percentage of the resource's time that will be spent on this project.
   2. Select **Plan Effort (0)** if you want to plan the effort for each week. Click the **Add** button to display the *Add Efforts* screen. Enter the number of hours for each week and click the **Add Efforts** button.
   3. Select **Plan Effort Total** if you want to enter the total number of hours you will require from this resource.

6. Select if you are flexible on dates and effort. If this option is selected, the approver can modify the dates and effort before approving your request.
7. Select a preferred resource from the list.
8. Select if you are flexible on preferred users. If this option is selected, the approver can modify the preferred users before approving your request.
9. Choose the Area of Expertise if this parameter is used in your system.
10. Choose the Approver Identification Tag if this parameter is used in your system.
11. Click **Submit for Approval** to send the allocation request for approval, or click **Save** to save changes and not submit for approval.

RELEASE RESOURCE ALLOCATION

You can release a project resource allocation after the resource allocation has been approved. You can choose to release for the entire duration or for a partial duration of the project.

You must have appropriate permissions to release a resource allocation.

To release a resource allocation, do the following:

1. Navigate to the **Resources** page by selecting **Project Module** Menu **(Project #) > Go To > Resources** or by clicking the **Resources** link on the Left Navigation Bar within a particular project.
2. Select a resource allocation and from the **Actions** menu select **Release**, or click the **Release** button.
3. Select if you want to release the allocation for the entire duration or release the allocation for a partial period.
4. Enter the modified allocation dates by clicking on the **Calendar** icon, if you selected to release partial allocation.
5. A list of activities associated with this resource is displayed. You have the option to unassign all activities associated with the resource by checking the **Unassign** box.

6. Enter a reason for releasing this project resource allocation.
7. Click the **Release** button.

Only Project Managers with appropriate permissions can unassign activities.

VIEWING A TEAM MEMBER'S CALENDAR

To view a team member's calendar:

1. Navigate to the *Project Resources* page **(Project #) →Go To → Resource→ Listing**.
2. Select a resource and from the **Actions** menu select (**Actions → Select**). The *Details* page is displayed.
3. Select the **Calendar** tab.

You must have the **View All Resource Calendars** permission to view a team member's calendar.

VIEW RATE CHANGE HISTORY

To view a detailed list of rate changes associated with a resource:

1. Navigate to the **Project Resources** page **(Project #)→ Go To→ Resources → Listing** or click the **Resources** link on the Left Navigation Bar within a particular project.
2. Locate the resource you want to edit and select **Actions→Edit**. The *Edit Team Member Info* screen is displayed.
3. Click the **[View Rate Change History]** link.

You must have the **View Team Member Rate** and **Activity Cost** permissions to view a team member's calendar.

PROJECT METRICS

EnterpriseTrack provides the capability to track a number of different metrics for a project. Users can track metrics data over time. Navigate to **Project Metrics** using the **Project Module Menu (Project #) → Go To → Metrics**. You can also click on the **Metrics** link in the **Projects** sub-menu to view/edit metrics data.

You can track one or more metrics for a project. Primary Metric for a project is specified when a project is created. Optionally, you may create one or more additional secondary metrics that can be tracked for a project.

To add a secondary metric, from the **Project Metric** page, click on the **Create** button. The **Create New Metric** screen is displayed.

You will need to select a metrics type. The list of available metrics types is specified during the configuration phase. Metric types can be added through the **Administration** screens also.

When a new metric is added to a project, you could specify the baseline and target values. For baseline, target and each individual metrics entry lower and upper confidence limits can be specified. The **Entitlemen**t field represents best output the current process yields without making any changes to the process.

Time-series data for a metric is entered based on the tracking frequency specified.

To enter time-series data for metrics click on the **[Data]** link for a specific metric. The **Metric Tracking Data** screen is displayed.

Dates are suggested when a user enters metrics data are based on the tracking frequency specified. Users can enter metrics data for the date suggested or change the date by clicking on the calendar icon and selecting a different date.

Chart for the time series data entered for metrics can be viewed by clicking on the **Chart** button.

PROJECT NOTES

Through the use of **Notes** and **Issues**, EnterpriseTrack provides a collaborative workgroup environment to ensure knowledge sharing and issue resolution.

You can add notes to a project by selecting **Project Module Menu (Project #) → Go To → Notes**. Click on the **Create** button to add a note. A notes report captures all the notes from a project. You need to specify a note type when creating new notes. Notes of type Executive Summary and Lessons Learned are displayed in the project final report. Notes of type Confidential are visible only to the list of users specified by the note creator. Using confidential notes two users could privately exchange notes about the project.

PROJECT ISSUES

Through the use of **Notes** and **Issues**, EnterpriseTrack provides a collaborative workgroup environment to ensure knowledge sharing and issue resolution.

EnterpriseTrack allows users to raise issues, assign owners to issues, and record the status and completion date of the issue. You can add issues to a project by selecting **Project Module** Menu **(Project #) → Go To → Issues**. Click on the **Create** button to add a new issue.

You can view existing issues by clicking on the hyperlink under the **Description** column. You can attach documents to issues if needed.

WORKING WITH PROJECT PLANS (ROADMAP)

The project plan, also known as the Roadmap or the Work Breakdown Structure is a central part of working with Projects in EnterpriseTrack. This section describes the many different ways in which you can view and work with a Project Plan. The next section describes how to work with individual activities (tasks) that constitute the Project Plan.

When a project is created with a designated project type and roadmap, the activities (tasks, tollgates etc.) are automatically pre-populated. These can be viewed by navigating to **the (Module Menu) Project # → Project Plan**.

VIEWS OF THE PROJECT PLAN

From the **View** menu you can control how you want to view the project plan.

From the **View** menu you can navigate to the **Project Plan (Roadmap)** screen, go to the **Edit All** screen, view documents, Gantt charts, and assignments.

You can select the columns you want to view and select if you want to view the filter row on the **Project Plan** page.

Select **Activity Display Mode** to choose if you want to view the screen as a split page, open popup windows or just on the main page.

The **Toolbars** option allows you to select the **Print-Data**, **Editing**, **Views**, and the **Row Action** toolbars.

Save the view settings for yourself, all users, or users with certain access profiles.

TABS

A typical Project Plan view will have the following tabs: **All**, **Define**, **Measure**, **Analyze**, **Improve**, **Control**, **Realization**, **Gantt**, and **Assignments**. All configurations will show an **All** tab, this tab shows all the activities (tasks) of the Project Plan.

If configured as **Phase Gated Roadmap**, the Project Plan will also display tabs of the phases of the project. Each tab displays the activities of that phase. The closed phases are marked with a checkbox and the currently open phase is automatically selected and displayed.

You can select any of the tabs at any time to display the relevant view.

PROJECT PLAN VIEW

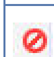
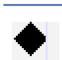
Get to the **Project Plan** view by selecting **(Project Plan Page Menu) View → Project Plan**.

A Project Plan is a prescriptive way to go about completing a project. When a project is created, you can either specify a project plan from the list of pre-configured project plans, or choose to import a project plan from Microsoft Project. Project Plans are configured using the Administration screens.

A project plan is made up of multiple activities. Depending on your role on a project you will work with different types of activities. Each activity has an assigned owner (a member from the Project Team) and Status. You can also record the estimated and actual hours for completion of an activity, attach documents and tools, and can track finances for each activity.

ICONS IN THE PROJECT PLAN

The table below describes the fields and icons that are displayed on the **Project Plan** page. Place your cursor over the icons in the user-interface to see their explanation.

Name/Icon	Icon Displayed	Description
#		Displays the activity number.
Name		Displays the activity name.
 (Status)		Displays the status of the activity (phase, deliverable, or tollgate, etc.). Note: If the activity is Open, the Status column will be blank for all non-top level activities like Tasks, Deliverables, etc.
For top-level activities like Phases, Stages, etc. the Status icon indicates on-time status of the activity. For newly created Phases, the Status indicator might be blank till the nightly process runs and sets the on time indicators.		
		The phase is past the due date.
		The phase is at risk of not meeting the due date.
		The phase is on schedule.
If the activity type is Task, Tollgate, Deliverable, etc.		
		The task has been completed.
		The task has been marked Not Applicable.
 Milestone		Indicates a planned milestone activity.

Name/Icon	Icon Displayed	Description
		Indicates a milestone that is past the due date.
		Indicates a milestone that is completed.
		Indicates a planned key milestone activity.
		Indicates a key milestone that is past the due date.
		Indicates a key milestone that is completed.
(Tollgate)		See Tollgate Icons
		See Tollgate Icons
Warning		Displays warning messages. For example, if there is mismatch between the Expected Remaining Effort and Estimated Time to Complete.
		Activity has tools associated with it. You must download and complete the tool before closing the phase. Use the Documents tab to view the tools.
		Activity has documents. Use the Documents tab to view the attached documents.
	1	Displays the aggregate status of the tasks. Note: You can view and configure the aggregate status from the Status Indicator tab, see Activity Status Indicators. Task – Past Due
	2	Task – At Risk
	3	Task – On Schedule
Type		Displays the type of activity (Phase, Task, Deliverable, or Tollgate, etc.).
Resources		Displays the resources assigned to the activity.

Name/Icon	Icon Displayed	Description
Approvers		Displays names of approvers. The approvers may need to sign-off before completing an activity.
Baseline Start		Displays the baseline start date.
Baseline Completion		Displays the baseline end date of the activity.
Target Start		Target start date of the activity.
Target Completion		Target completion date of the activity.
Actual Start		Actual start date of the activity.
Actual Completion		Actual completion date.
Estimated Time to Complete		The estimated time (in hours) to complete this activity. This is an information only field and is manually entered.
Expected Remaining Effort		The Estimated remaining (in hours) effort to complete this activity. This is a computed field (Plan minus Actual).
Labor Expense Type (LET)		The type of LET. This attribute is added to project activities and is associated with a finance expense category (Capital Expense, or Operational Expense).
Comments		Displays the comments entered for each activity.

TOLLGATE ICONS

The following table shows the various icons and mouse-over text messages you may see in the tollgate field on the **Project Plan** page.

Icon	Mouse-Over Text	Description
If resources are enforced for activities		

Icon	Mouse-Over Text	Description
	Next Action: Mandatory resources need to be assigned	No mandatory resources or not all mandatory resources have been assigned to this tollgate. Use the Resources tab to assign resources to complete the tollgate.
	Next Action: Mandatory Resources Assigned. Tollgate can be Completed	Mandatory resources have been assigned. You can now close the tollgate by changing the Status to Completed on the General tab.
	Tollgate Approved	The tollgate is closed.
If mandatory resources are not enforced for the activity. (Note: The system still requires you to add at least one resource to complete the activity)		
	Resources Required	No resources have been assigned to this tollgate. Use the Resources tab to assign at least one resource to complete the tollgate.
	Resources Verified	Resources have verified the tollgate. You can now close the tollgate by changing the Status to Completed on the General tab.
When mandatory resources are not enforced and you have assigned preferred resources		
	Resources Required	No resources are assigned to this tollgate. Use the Resources tab to assign at least one resource to complete the tollgate. The preferred resources are marked with an asterisk (*).
	Resources Verified	Resources have verified the tollgate. You can now close the tollgate by changing the Status to Completed on the General tab.
If Approvers tab is enabled and approvers are required before closing an activity.		
	Select Approvers	You must select required approvers for this tollgate from the Approvals tab.

Icon	Mouse-Over Text	Description
	Approvals Required	The tollgate has pending approvals.
	Approvals Granted	The tollgate has been approved. You can now close the tollgate by changing the Status to Completed on the General tab.
	Tollgate Approved	The tollgate is closed.

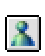
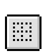
TOOLBARS

This section describes the toolbars and their functions. You can show or hide the 4 toolbars (**Print-Data**, **Editing**, **Views**, and **Row-Action Menu**) within the **Project Plan** page.

Oracle recommends that beginning users hide these toolbars. To hide the toolbars, from the **View** menu select **Toolbars** and deselect the checkbox associated with each toolbar.

Place your cursor over the buttons in the user-interface to see their explanation.

Icons	Description
	Allows you to expand the tree completely.
	Allows you to add a child node (E.g. task)
	Allows you to add a peer node (E.g. Tollgate)
	Appears next to the Add child and Add peer buttons to allow you to select from a sub-menu.
	Edit activity.
	Deletes a selected activity.
	Copies a selected node. Leaf nodes can be copied. If the button is not enabled, make sure you can see the properties of the leaf node (e.g. Task, not Gate) in the properties pane.

Icons	Description
	Cuts a selected node. Leaf nodes can be copied. If the button is not enabled, make sure you can see the properties of the leaf node (e.g. Task, not Gate) in the properties pane.
	Pastes a selected activity.
	Paste Special.
	Copy dates from Plan to Baseline
	Edit all activities on the Roadmap page.
	Allows you to save your settings, click on the selector button to choose from the options.
	Allows you to reset your settings, click on the selector button to choose from the options.
	Allows you to view the documents and tools associated with a selected activity.
	Allows you to print the Roadmap grid. Pop ups must be disabled.
	Allows you to export the roadmap grid to a CSV file.
	Allows you personalize the grid by choosing the columns you want displayed on the Roadmaps page
	Allows you to set the sort order for the items listed on the page
	Allows you to show or hide the grid lines on the page

USING KEYBOARD SHORTCUTS

The table below lists some of the keyboard shortcuts you can use on the **Project Roadmap** page.

Keyboard Shortcut	Description

Keyboard Shortcut	Description
Insert (After selecting a row)	Add a new peer activity. You can use this only if the activity type default is set.
Ctrl + Insert (After selecting a row)	Add a new child activity. You can use this only if the activity type default is set.
Up arrow	Move up a row.
Down arrow	Move down a row.
Page Up	Move to the top of the page.
Page Down	Move to the bottom of the page.
Home	Goes to the first activity on the page.
End	Goes to the last activity on the page.

DOCUMENTS VIEW

To access the **Documents View**, go to **(Project Plan Page Menu) View → Roadmap → Documents**. From the **Documents** view, you can view all the associated documents and tools. To add a document select **Create** from the **Actions** menu. From the **Actions** menu you can select **Upload** to upload a tool.

GANTT VIEW

You can view the Gantt chart for all activities or tasks in your Project Plan. You can view the plan versus the actual dates or the scheduled versus the actual dates.

To view the Gantt chart, click on the **Gantt** tab from the **Project Roadmap** page, or select **(Project Plan Page Menu) View → Gantt**. From the **Gantt** tab you can edit the dates and duration of tasks, change the % complete, add dependencies, view task details, add documents, and change the status of your activities.

The button on the top left corner of the page displays the project summary. The project name, status, initiative, project stage, project type, project roadmap and the project manager are displayed.

The button shows the colors that are on the Gantt bars. Use the **Display Options** pull-down menu to choose the Gantt view you want to display (**View Plan Vs. Actual Dates** or **View Schedule Vs. Actual Dates**).

From the **Timescale** pull-down menu you can choose to view the project in different timescales (Years and Quarters, Quarters and Months, Months and Weeks and Months and Days). You can also left click and right click on the title bar to change the timescale.

From the **Actions** pull-down menu, you can view details of each task, add documents, change the status of tasks, go to different tabs, create and edit peer and child activities, or create intra and cross projects dependencies.

You can view additional information on each individual task or activity by moving your mouse over the Gantt bar. You can view the name, the % complete, the start and end dates, and the duration of the task. It also displays the tasks that you can edit.

The options under the **Save** menu are displayed only if you have permissions for **manage_activity_top_level_roadmap** and **manage_activity_other_level_roadmap**, and the project should not be closed/realized or locked for MSP integration, dependencies should be allowed for this project, the scheduling mode should be semi-automatic, and the external mode for dates/duration should be internal.

To edit in the Gantt view, from the **Manage Roadmap** menu select **Edit Gantt (Manage Roadmap > Edit Gantt)**. The rows you can edit are highlighted in pink.

CHANGING DATES AND DURATION

To change dates and duration, do the following:

1. From the **Gantt View** page, select **Edit Gantt** from the **Manage Roadmap** pull-down menu.
2. Select an activity, the activity you selected will be highlighted. To change the end date, drag the bar from the right side and move to the desired date. To change the start date, drag and move the bar from the left side. You can also click on the **Calendar** icon to select and change the start and end dates.
3. From the **Save** menu, you can select **Save/Compute Dates** or select **Save/Compute Dates and Update Plan** to save your changes and update the roadmap.

CHANGING THE PERCENT COMPLETE

To change the percent complete, do the following:

1. From the **Gantt View** page, select **Edit Gantt** from the **Manage Roadmap** pull-down menu.
2. Select an activity and right click on the bar and select **Update % Complete here**, the value is set to where you are in the bar when you selected this option.

   -or-

   You can right click on the bar and select **Enter % Complete**. A pop up window appears where you can enter the % complete. The changes are reflected in the WBS (Roadmap).

3. From the **Save** menu, you can select **Save/Compute Dates** or **Save/Compute Dates and Update Plan**.

> To manually change the **% complete**, the **Task % Complete** must be set to **Manual**. You can change this from the **Basics** tab (from the **Actions** menu select **View Details >Basics**). This is typically set by your Administrator.

CREATING DEPENDENCIES

To create dependencies, from the **Gantt View** page, select **Edit Gantt** from the **Manage Roadmap** pull-down menu.

To create dependencies, click on the bar associated with an activity or task and drag vertically down and drop to the next activity. A blue line is displayed showing the link. The linked task is always set to start only after the previous task has ended.

From the **Save** menu, you can select **Save/Compute Dates**. You can save the changes and update the WBS (roadmap) by selecting **Save/Compute Dates and Update Plan**. You can view the dependencies on the Roadmap page under the predecessor column.

ASSIGNMENTS VIEW

You can view the resource assignments for all activities or tasks in your Project Plan. To access the **Assignment View**, go to **(Project Plan Page Menu) View → Assignment**.

GROUP EDIT OF THE PROJECT PLAN

The **Edit All** capability provides a powerful and easy way to work with and complete simple activities or tasks in the Project Plan. Click on **(Page Menu) View → Edit All**, or click on the **Edit All** icon.

You can complete the actions described in this section using the **Edit All** option. Other, more complex actions on activities are described in *Working with Activities (Tasks)*.

ASSIGNING RESOURCES, APPROVERS, ASSIGNMENT TYPES

You can select the **Auto Assign** check box next to **Resources** or **Approvers** to automatically select from the list of preferred resources or approvers. You can also select the assignment types.

ENTERING DATES

To enter dates, click on the calendar icon and select a date for the **Plan Start**, **Plan Completion**, **Actual Start** and **Actual Completion** dates.

COMPLETING TASKS

To complete all tasks select the **Open**, **Not Applicable** or **Completed** check box from the **Mark all Items** column.

EXPORT TO EXCEL AND PRINT

From the **Data** menu, you can print the data or select **Excel** to export the Project Plan data to Microsoft Excel. From the **File Download** window select **Save** to save it as an Excel file or **Open** to open it in Excel.

PROJECT PLAN WORKFLOW

The **Project Plan** Page Menu provides other functions for working with the Project Plan as a whole.

CLOSE STAGE

To close a top level activity like a Phase or Stage, select **Close Phase** from the **WorkFlow** menu. You can use any of the dates displayed on the screen as the Phase Close Date. Click on the **Calendar** icon to select a date and click on **Close Phase** button.

HOLD PROJECT

To put a project on hold, from the **WorkFlow** menu, select **Hold Project**. Change the **Status** field to **On Hold** and click on **Save**.

CANCEL PROJECT

To cancel a project, from the **WorkFlow** menu, select **Cancel Project**. Change the **Status** field to **Cancelled** and click on **Save**.

CHANGE PROJECT PLAN

You can change the **Project Type** and **Project Plan** after a project is half way through its lifecycle. From the **WorkFlow** menu, select **Change Project Schedule**.

The Change Project Plan page displays the current project type, project plan (roadmap) and phases. You can select a new **Project Type** and **Project Plan** from the drop down list on the right. Based on the new project plan you selected, a list of phases is displayed on the right. On the left select the first phase from the current roadmap to be deleted. All phases after this phase including the selected phase will be deleted. You can only delete open phases and closed phases must be reopened before deleting. All deliverables and tasks from deleted phases are also deleted.

On the right, select the first phase to be added to the project. All phases including the selected phase are added to the project roadmap.

The Project type and Project Plan (Roadmap) fields are also updated with new values and the project filters can retrieve this project using the new values.

WORKING WITH ACTIVITIES (TASKS)

Activities (tasks) are the core building blocks in the EnterpriseTrack system. They are highly configurable. You can configure multiple different types of activities and they can each have specifications based on the type of activity (Task or Deliverable or Phase). You can specify the number of fields, choose whether they are nested, or specify the type of requirements required to complete the activity, or specify the approvals, documents, tool-templates etc.

In many cases, completing an activity may only require assigning resources and changing the status to **Complete**. You can use the **Edit All** screen, **(Project Plan Page Menu) View → Edit All**, or click on the **Edit All** icon to complete several different activities at the same time (see *Group Edit of the Project Plans*). You also work with an activity at any time using the Activity Actions Menu. Use the Activity Actions Menu to view more complete and detailed information on an activity.

ACTIVITY MENU

From the **Actions** pull down menu you can view the details associated with each activity, view and upload documents, and go to other tabs like Resources and Dates/Efforts. You can also create, edit, delete, copy, complete and delete activities like deliverables, tasks, tollgates, or phases. You can also work on these items using the toolbar.

ACTIVITY DISPLAY MODE

When you are working on an activity you can choose how you want to view the activity details. You can choose to view it within the main page, or as split page or on a separate pop-up window. From the **View** menu select **Activity Display Mode** and select **Main Page**, **Split Page**, or **Popup Page**.

Oracle recommends you select the **Popup Page** option.

ACTIVITY DETAILS DISPLAY

From the **Actions** menu associated with an activity, select **View Details** to view the activity or task details. The tabs that show up for an activity are configurable and only a subset is shown depending on the configuration of the activity. Typically, you may see the **Summary**, **Basics**, **Efforts/Dates**, **Resources**, **Documents**, **Dependencies** and the **Status Indicator** tabs.

ADDING A NEW ACTIVITY

You can add both peer and child activities to the Project Plan from the **Roadmap (Project Plan)** page.

The table below describes the fields you need to enter on the **Basics** tab to add a new child or peer activity.

You may see a subset of these fields for your activity type based on your configuration.

Field	Description
Basic Details	
Activity Name (Tollgate, Task, Deliverable, etc.)	Enter a name for this activity.
Milestone	Check the box if the activity is a milestone activity. You can also select if the activity is a key milestone activity.
Task Type (Only displayed if the activity is a Task.)	The task type, for example: Analysis Tool, General, Control Plan, etc.
Additional Details	
Deliverable % Completion	Choose how the deliverable completion should be calculated. You can choose from the following options: Duration-Based, Effort-Based, Count-Based Immediate Children, Count-based All Children, Physical, and Manual.
Duration-Based % Completion	Choose how the duration-based completions should be calculated. You can choose from the following options: Actual VS Planned Duration-Self, Actual VS Planned Duration-ImmediateChildren, Actual VS Planned Duration-AllChildren, and Manual/External.

Effort-Based % Completion	Choose how the effort-based completions should be calculated. You can choose from the following options: Actual VS Planned Duration-Self, Actual VS Planned Duration-ImmediateChildren, Actual VS Planned Duration-AllChildren, and Manual/External.
Physical % Completion	Select the physical % completion (Manual/External).
Open Items	Enter the open items.
Resources	
Enforce Resources	Select if you want to enforce assigning resources to this activity.
All Resources Required (Only enabled if you selected Yes on Enforce Resources.)	Select if all resources are required to complete this activity. If you select **Yes**, then all resource roles that you select in the next field Mandatory Resources must be assigned from the **Resources** tab.
Preferred Resources (Displays only if you selected No on Enforce Resources)	From the list, select the type of preferred resources for this task. You can check the Select **All**/**None** box to select or deselect all resource types in the list. If you select preferred resources, the system allows you to choose resources from the **Resources** tab that match the preferred resource type (e.g. Finance Representative, Project Sponsor etc.) you select here.

Mandatory Resources (Displays only if you selected Yes on Enforce Resources)	From the list, select the type of mandatory resources for this task. You can check the Select **All**/**None** box to select or deselect all resource types in the list. If you select mandatory resources, the system allows you to choose resources from the Resources tab that match the mandatory resource type (e.g. Finance Representative, Project Sponsor etc.) you select here.
Approvers (Only enabled if the activity type is Tollgate.)	
Approvers can modify Activity Status	Select if approvers can close or complete an activity.
Enforce Approvals	Select if you want to enforce approvals to this tollgate. If you select **Yes**, you cannot complete the tollgate unless you have received approvals.
All Approvers Required (Enabled if you chose Yes on Enforce Approvals.)	Select if all approvals are required. If you select **No**, you can complete the tollgate even if you have not received all approvals.
Preferred Approvers	Select the type of preferred approvers from the list. You can check the Select **All/None** box to select or deselect all approver types in the list.
Miscellaneous	
Cost	
Labor Expense Type	From the drop-down list, select a Labor Expense Type. The choices you see are set by your Administrator.
Fixed	Enter the Plan and Actual fixed costs for this activity.
Material	Enter the Plan and Actual material costs for this activity.
Other	Enter other costs associated with this activity.

Comments	Enter any comments associated with this activity.
Open Items	Enter any open items associated with this activity.

Based on your settings only certain columns may be editable.

INSERTING A ROW

You can also insert rows from within the **Roadmap** page using keyboard shortcuts.

1. Select the level below which you want to add a new child activity and press the **Ctrl + Insert** keys on your keyboard.

   Select the level at which you want to add a new peer activity and press the **Ctrl** key on your keyboard.
2. A new row highlighted in pink is displayed. Enter a name for this activity.
3. Click on the **Calendar** icon to enter the start and end dates.
4. You can also assign dependencies by typing the predecessor task number in the **Predecessors** column. The predecessor column is available only if the Activity Type underlying the activity you are creating has dependencies available.
5. To assign resources, click on the button to view the resource pop-up list. This pop-up shows a list of resources already on the Project Team. From this pop-up you can add a new resource to this activity and also to the Project Team. To do this, select the **Project Role** you want the new resource to take on. Then the pull-down will show the list of resources in the system that can take on this project role. You can also do a type-ahead in the resource pull-down box. Enter the last name of the resource and a list of matching resources will be shown, click on selected resource and on the **Assigned** checkbox. You can also filter resources based on availability by clicking the **Filter** button. You can select multiple resources and also enter the plan availability. Click on the button to hold your changes in the resource pop-up while you are entering values on other fields. You must click the **Save** icon to save your changes.
6. You can add additional details like dates, finances, resources, documents, etc. using the Activity Details dialog (**Actions** > **Edit**). Choose the tab you want to edit (**Basics**, **Effort/Dates**, **Resources**, **Dependencies**, and **Approvals**).
7. Click the **Save** icon to save changes.

ADDING AN ACTIVITY

Alternately, to add a child, or peer activity, do the following:

1. From the **Project Roadmap** page, select the activity below which you want to add a new task. The row you selected will be highlighted.
2. Select the level below which you want to add a new child activity click the **Add Child** button, or from the **Actions** column select **New** > **Child Activity** . You can select the type of activity (e.g. Add Tollgate or Add Task) by clicking the sub-menu selector button.

   Select the level at which you want to add a new peer activity and click the **Add Peer** button, or from the **Actions** column select **New** > **Peer Activity**). You can select the type of activity (e.g. Add Tollgate or Add Task) by clicking the sub-menu selector button.
3. Enter a name for the task and click on the **Save** button.
4. You can add additional details like dates, finances, resources, documents, etc. using the Activity Details dialog (**Actions** > **Edit**). Choose the tab you want to edit (**Basics**, **Effort/Dates**, **Resources**, **Dependencies**, and **Approvals**).
5. Click the **Save** icon to save changes.

EDITING AN ACTIVITY

You can edit an activity from within the project **Roadmap** page or by using the Activity Details dialog.

USING THE ACTIVITY DETAILS DIALOG

To edit an activity using the Activity Details Dialog, do the following:

1. From the **Project Roadmap** page, select the activity you want to edit.
2. Click the **Edit** activity icon, or from the **Actions** menu select **Edit** and choose the tab you want to edit (**Basics**, **Effort/Dates**, **Resources**, **Dependencies**, and **Approvals**).
3. Click the **Save** icon to save changes.

EDITING FROM WITHIN THE ROADMAP GRID

To edit an activity from within the Roadmap grip, do the following:

1. From the **Project Roadmap** page, select the activity you want to edit. The row you want to edit is highlighted in pink.
2. You can edit the task within the grid. Some of the columns you can edit are the task name, resources, dependencies, duration, start date, end date, planned effort and comments. You

cannot edit the task name if the task name comes from the roadmap. You can change the name only if it is a task you have added.

3. Click on the **Calendar** icon to edit the start and end dates.

The fields that are editable depend on the Planned Effort Type and Actual Effort Type of the activity.

Various settings on the activity determine if all the start/end dates are editable.

- If the activity you are editing is Effort based, then its start date is editable, but its end date is automatically determined by the Effort on the activity.
- If the activity has a dependency on a previous activity, then some of its dates will come implicitly from the dependent activity and cannot be edited.

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4. You can assign dependencies by typing the predecessor task number in the **Predecessors** column. The predecessor column is available only if the Activity Type underlying the activity you are editing has dependencies available. You cannot edit cross-project dependencies from within the Roadmap gird. You can use the Activity Details dialog box to do this (**Actions** > **Edit** > **Dependencies**, and select **Cross-Project Dependencies**.

5. To assign resources, click on the ⊞ button to view the resource pop-up list. This pop-up shows a list of resources already on the Project Team. From this pop-up you can add a new resource to this activity and also to the Project Team. To do this, select the **Project Role** you want the new resource to take on. Then the pull-down will show the list of resources in the system that can take on this project role. You can also do a type-ahead in the resource pull-down box. Enter the last name of the resource and a list of matching resources will be shown, click on selected resource and on the **Assigned** checkbox. You can also filter resources based on availability by clicking the **Filter** button. You can select multiple resources and also enter the plan availability. Click on the ⊞ button to hold your changes in the resource pop-up while you are entering values on other fields. You must click the **Save** icon to save your changes.

6. Once you have made all your changes, click the **Save** icon to save changes or **Cancel** to cancel out your changes.

COMPLETING AN ACTIVITY

You can also click on an activity to put it in the edit mode. The selected row is highlighted in pink. Click on the **Status** column to change the status. Alternately, you can complete an activity by clicking the **Complete** button on the **Summary** tab, or select **Complete** on the **Basics** tab. Once you have completed an activity you must save your changes.

USING THE SUMMARY TAB

Before completing an activity, you can go to the Summary tab to view the project summary. To view the **Summary** tab, go to **Actions → View Details**. This tab will assists you in completing all the required missing items before marking an activity as Complete. For example, you can view if any child activities are still open, if mandatory resources are not assigned or if approvers have not been assigned or have not signed off on this activity. Clicking on the links below the **Actions** column takes you to the missing items. You can also edit the dates/efforts and reopen a gate activity from this tab.

MANAGING GATES (OR PHASES)

COMPLETE GATE

If you have the permission to close or advance a gate activity you will be able to change the Status of a gate activity. When all the activities for a given phase are Complete or marked Not Applicable, then the gate can be completed. Completing a gate is exactly like completing any other kind of activity.

If your deployment configuration is set to automatically close gates on completion of all activities within it, then the gate activity will be automatically completed when the last activity in the current phase is marked complete. The project gates will automatically be advanced till the project is in the final phase. After all activities in the last phase are closed, the last gate will remain open till the project lead or user with project close permission closes the project.

REOPEN A GATE ACTIVITY

You can reopen a closed gate type activity (or phase) from the **Project Plan** page. Click on the name of the activity, and select **View Details** from the **Actions** menu. From the **Summary** tab you can reopen a gate activity.

ACTIVITY DEPENDENCIES

You can view and specify the inter-project and intra-project dependencies from the *Dependencies* tab (**Actions → View Details→ Dependencies**) on the Project Plan page. The scheduled status indicator of the predecessor tasks, the predecessor IDs and the type of dependency (finish to start, or offset) are also displayed.

For projects with predecessor tasks, the start date is computed from the completion date of the predecessor tasks and the completion date is calculated from the start date and the duration of the predecessor activity. For hard dependency (intra-projects) the Plan Date shifts based on the predecessor dates, and for soft dependency (inter-projects), there is no date shifting, the status indicators display late internal project.

To add new inter-project dependency, click the **Add New** icon from the **Predecessor** row. Enter a sequence number and the type of dependency. You can also select either a **Delta** offset by entering the number of delta days or select **Percentage Completion by Date Range**.

To add new intra-project dependency, click the **Add New** icon from the Cross-Project Predecessor row. Enter a project number, a sequence number and the type of dependency. You can also select either a **Delta** offset by entering the number of delta days or select **Percentage Completion by Date Range**.

EFFORT AND DATES

From the **Effort/Dates** tab you can select if an activity is to be duration-based or effort-based. If you select **Duration-Based**, then you can specify the duration and the effort is computed based on the duration and resources assigned. If you select **Effort-Based**, then the duration is computed based on the time required by assigned resources to deliver the estimated effort.

1. Select a project and navigate to the **Roadmap** page **(Project #) > Roadmap**.
2. Select an activity and from the **Actions** column select **Edit > Efforts/Dates**. The efforts and dates for the activity are displayed.
3. Click the 

button next to **Plan Effort Type**. Select a Planned Effort Type (PET) from the drop down menu choices.
4. Select the appropriate **Actual Effort Type** (AET) from the drop-down menu choices.
5. Select if you want to include plan effort in project budget. If this flag is set to **Yes**, then this activity's costs will rollup to the project budget.
6. Enter the appropriate **Baseline**, **Plan**, **Actual** and **Remaining Effort**. Based on the Planned Effort Type (PET), and Actual Effort Type (AET) you have selected, different effort fields are enabled for data entry. For example, if the AET is set to Effort from Timesheets, then the actual effort flows through from approved timesheets.
7. Enter the start date, completion data and duration for the **Baseline**, **Plan** and **Actual** data types.
8. Click the **Save** button to make the necessary changes.

ABOUT EFFORT TYPES

The following table displays the Mode and Effort Type options that you can select.

Effort Type	Options
Planned Effort Type	Duration &Resource % Availability

Effort Type	Options
	Effort at Activity Level – Equal % Distribution
	Effort at Activity Level - Unequal % Distribution
	Effort at Resource Level (Summary)
	Effort at Resource Level (Detailed)
Actual Effort Type	Duration & Resource % Availability
	Effort at Activity Level – Equal % Distribution
	Effort at Activity Level – Unequal % Distribution
	Effort at Resource Level (Summary)
	Effort at Resource Level (Detailed)
	Effort at Resource Level from Timesheet
	Effort at Resource Level from Finance

If the AET is changed from Duration to Timesheet, then the data received from all approved timesheets for this activity is used to populate the activities within the roadmap and all resource and finance tables. If the PET is changed from Duration to Effort at the activity level, then based on the data at the activity level the duration is calculated and the effort is distributed among the resources. If the PET is changed from Effort at Resource level (Detail) to Effort at Resource Level (Summary), the weekly effort/cost data provided by the user may be lost.

DURATION & RESOURCE % AVAILABILITY

This is a duration-based Effort Type. Effort is calculated based on the duration and the number of resources assigned to the activity. You cannot edit the effort.

EFFORT AT ACTIVITY LEVEL - EQUAL % DISTRIBUTION

This Effort Type is effort-based. The completion date and duration of an activity is calculated based on the start date, and the effort (Plan, Actual and Remaining) that is entered for the activity. The effort is equally divided among the assigned resources. You cannot edit the completion date and the duration. Plan duration for a task is computed based on the maximum duration across assigned resources.

EFFORT AT ACTIVITY LEVEL - UNEQUAL % DISTRIBUTION

This Effort Type is effort-based. The completion date and duration of an activity is calculated based on the start date, and the effort (Plan, Actual and Remaining) that is entered. You can use the Effort Distribution field to enter the effort for each resource assigned to the activity. The combined resource availability determines the completion date of an activity. You cannot edit the completion date and duration of an activity.

Plan duration for a task is computed based on the maximum duration across assigned resources. For example: Activity A starts on May 23rd and requires 56 hours to complete. It is assigned to both Rick and Ann with a 70/30 distribution. Rick will start on 23 and end on 28, and Ann will start on 23rd and end on 26th. The start date for the activity is 23rd and the end date will be 28th. The duration for the activity will be 5 days.

EFFORT AT RESOURCE LEVEL (SUMMARY)

This Effort Type is effort-based. The completion date, duration, and effort are calculated based on the start date, and the effort that is entered at the resource level for each assigned resource. The effort is entered only at the resource level and not at the activity level. You cannot edit the duration and the completion date of the activity.

EFFORT AT RESOURCE LEVEL (DETAILED)

This Effort Type is effort based. The total planned effort, total actual effort, completion date and duration are calculated based on the start date, and the effort that is entered at the resource level for each assigned resource. You cannot edit the duration and completion date. Detailed effort is added in weekly increments on the Resources tab.

EFFORT FROM TIMESHEET

This Effort Type pertains only to the Actual Effort Type and is displayed only if the timesheet feature is enabled. The actual start, completion dates, and duration are editable but do not affect the actual effort. The Actual Effort is a read-only field and its value is obtained from timesheets.

ACTIVITY RESOURCE EFFORT DISTRIBUTION

You can use the **Resources** tab to plan effort distribution across resources for a given task or activity. You can also plan resource effort on a weekly basis and enter the planned and actual overtime effort.

You can use the **Resources** tab to assign and plan the effort for each resource associated with a project activity.

1. Select a project and navigate to the **Roadmap** page **(Project #)** > **Roadmap** and select an activity.

2. Select an activity and from the **Actions** column select **Edit > Resources**. The current resources and effort distribution is displayed.
3. Select the **Period Type** if you chose **Plan Effort Type** as **Effort at Resource Level (Detail)**.
4. Click the **Assigned** checkbox to select the resources.
5. Select the role this resource this resource will play. You can check the box next to **R** (Responsible) or **A** (Accountable).
6. Enter the percentage that this resource is available to work on the activity.
7. Enter the effort distribution if you chose **Effort at Activity Level – Unequal % Distribution** for **Plan Effort** or **Actual Effort**.
8. Enter the number of hours under **Total Effort** and **Overtime Effort** if you chose **Effort at Resource Level (Summary)** for **Plan Effort** or **Actual Effort**.
9. Select the assignment type.
10. Click the **Save** button to save your changes.

ACTIVITY APPROVALS

On the **Approvals** tab, you can view and select approvers, request for approvals, check status and approve project activities. You can view this tab only if it has been enabled by your Administrator.

VIEW AND SELECT APPROVERS

1. Select an activity and go to **Actions** → **View Details**.
2. Select the **Approvals** tab.
3. Click the **Edit** button. Select the approvers and press the **Save** button.

REQUEST FOR APPROVAL

1. Select an activity and go to **Actions** → **View Details**. Select the **Approvals** tab.
2. Click the **Request For Approval** button.
3. Select an approver and click the **Request Approval** button.

APPROVING AN ACTIVITY

1. Select an activity and go to **Actions** → **View Details**. Select the **Approvals** tab.
2. Click on the **Approve** button.

3. From the drop-down menu select the status of the activity (Approved, Approval Denied, or Conditional Approval Granted), check the **Approve** box and click on the **Update** button.

ACTIVITY STATUS INDICATORS

You can view the project status indicators from the **Status Indicators** tab on the **Project Plan** page. The status name, the current and previous values and the type of computation used to display the status are displayed. These fields are set by your administrator.

GENERIC ("NON-WBS") ACTIVITIES

EnterpriseTrack allows you the flexibility of defining a list of activities that are outside of the Project Plan of the Project (we call these non-WBS activities). This may be a list of change requests, discussions, risks, etc. These activities are not tied to the project roadmap but are associated with a project and are displayed on the left navigation bar. You may define multiple different such lists, one each of change requests, discussions, risks etc. The activity configuration is highly flexible such that each list may have its own configuration of the fields for the activities in that list. These properties are set by your Administrator.

To use a non-WBS activity, navigate to the **Project Module** Menu **(Project #) → Go To → Change Requests** (or other configured non-WBS activity list).

All the **View** settings described for the Project Plan in *Views of the Project Plan* are available for non-WBS activities. You also work with activities in a manner similar to that described in *Working with Activities (Tasks)*.

CUT AND PASTE BETWEEN NON-WBS AND WBS

You can also copy and paste a non-WBS activity to be included as an activity on the project roadmap. From the activities page, e.g. Change Requests, select the activity and click the **Copy Row** icon and then click the **Paste Special** button. A popup displays with all the project plan activities. Select the level where you want to add this activity and click the **Paste** button.

The **Paste** button is disabled if your project roadmap is configured to not allow this type of project activity to be added to the roadmap.

PROJECT FINANCES

One of the key strengths of EnterpriseTrack is the richness with which project financial data can be captured and reported. The EnterpriseTrack product has a robust repository for maintaining project financial information. At a high level, the system can store information related to benefits and costs (gross to highly granular) on a monthly/quarterly/annual basis.

FINANCE MODULE PRIMER

Since the finance module in EnterpriseTrack is very sophisticated and robust, it could take some detailed understanding to use for maximum benefit. This section provides a quick overview of the finance module.

MAXIMUM NUMBER OF FINANCE MONTHS

EnterpriseTrack maintains project financial information over a fixed window (multiple of 12 months) from the start of a project. For example, in your instance, the product may have been configured to hold 48 months of financial data (benefits and costs associated with a project) from the Project Start Date. This window is specified during configuration stage.

Individual projects may use finance templates that may allow for a lower number of months than the maximum number of finance months defined for the deployment.

FINANCE SNAPSHOT

For planning purposes the system can store snapshot of the project finances. Depending on how your deployment is configured, finance snapshot can be stored when a finance representative performs finance validation. At project closure, if finance snapshot does not exist, the system will automatically store the current project finances in the finance snapshot.

Finance snapshot information is used as the Plan data in a report called Plan vs. Actual. When the report is run, current project finances are used for Actual data and are taken from the current financials for the projects.

COMPLETED PROJECTS

You can mark a project as completed if you want to stop maintaining any additional financial information on the project even prior to its full financial timeline.

COLOR CODING OF FINANCIAL INFORMATION

If this capability is enabled for your deployment, then the application will display project financials in two colors, in one color before the Finance Start Date and in another color for 12 months after the Finance Start Date. The Finance Start Date defaults to the Planned Project Close Date for a project, but can also be manually altered as explained later in this document.

This capability can be used, if your deployment requires that most projects would have financial benefits for a specified period (say 12 months) after a certain date (finance start date). For exceptions where benefits fall before the finance start date (Quick Hits) or after the 12-month period (Longer Term Benefits), users with additional permission can update the finances outside the 12-month period.

FINANCE LOCKS

Finance lock mechanism is used to indicate if the finances entered in the system have been validated and locked. Finance representative sets the lock month to indicate that the numbers below finance lock month should be considered as Realized or Actual finances. The terminology is configurable (see section below).

The application supports global lock month as well as project level lock month. If global lock month is being used, then finances for all projects below the global lock month are considered as Realized finances. If project level lock month is used, then for each project, finances below project's lock month are considered as Realized and rest are considered as Forecast.

Users that have the permission to update finances can only update finances after the finance lock date. Users with additional permission (finance administrator) can alter lock dates, or change data before the lock dates.

ADDITIONAL FLEXIBILITY IN TERMINOLOGY

In terms of terminology, the application allows your company to indicate what terminology you want to use to describe finance data before and after finance lock month. Typically the finance data after finance lock month is called Forecast. Finance data before finance lock is called Realized or Actual. You may want to write down your company's terminology in the boxes below for your reference.

	Data Before Finance Lock	**Data After Finance Lock**
Data Before Realization		
Data After Realization		

USING PROJECT FINANCIALS IN THE SYSTEM

Selecting **Project Module** Menu **(Project #)** → **Go To** → **Finances** or clicking on the **Finance** link in the **Project** sub-menu on the Left Navigation Bar displays a calendar of financial data for the project, organized in categories that are customized to match your company's financial tracking needs. Hard and soft savings and costs are captured across any number of categories that may impact income statement or balance sheet entries.

SUMMARY

The **Summary** tab displays an overview of the project finances.

The first table displays the financial calculations specified for your particular project such as the Net Present Value (NPV), Return on Investment (ROI), etc. These are defined by your system administrator.

The second table on the page displays the total project finances broken up into three columns – **Realized** (realized and validated financial benefits), **Not Realized** (Benefits already achieved but not yet validated by finance) and **Remaining Forecast** (benefits to be realized in the future).

The Third table displays overall project forecast. You can compare initial forecasts at proposal stage with the finance snapshot at project closure and latest finance estimates for the project. You can view the percent change and variance in the project finances captured at various stages.

The fourth table displays the current status of all finance validations for the project.

MONTHLY

The **Monthly** tab displays the monthly financial details. The categories of savings, costs and external benefit (soft dollar) items are configured for your system, and each category can have multiple sub-categories. Category totals are displayed in bold.

To view all the sub categories select the **Subcategories – Yes** option and click on the **Update** button. You can edit a specific finance category or finances for a specific month by selecting the appropriate option from the drop downs fields on the right.

The max number of months of financial data tracked was configured for your system (24/36/48, etc.) by the administrator. When a project is created, all the financial categories across all months are initialized to zero. As the project progresses, users may enter financial data in any month after the finance lock date (the columns/months that may be edited are marked **Plan** or **Forecast versus Realized** or **Actual**). The finance lock date is set globally by the finance Administrator of your system, and may be overridden by the financial Administrator for your project.

If your system is not configured to enter financials on a monthly schedule (but it does so on a yearly one) you will not see a Monthly tab. If it is set up to track financials as a lump sum aggregate value, you may be able to see a read-only view of a monthly breakdown.

TRACKING FINANCES AT THE LEVEL OF THE ACTIVITY

Your system may also be configured to allow you to track financial information at the level of the activity. You can enter financial data for each activity and the system will roll up all activity level data to display project level financial information.

Finances for the activity can be tracked at the resource or the task level. Finances for an activity may be configured in such a way that you can enter currency amounts (e.g. for Material Costs) or number of hours (e.g. for Labor Costs). If you enter the number of hours, the system will calculate the cost based on the hourly rate configured for the resource and display the correct currency value. You can also view, compute and override the overtime cost and the set up cost associated with individual resources at the project level or for each individual activity. The overtime cost is calculated based on effort (e.g. labor costs) and the set up cost is based on the cost rate (e.g. material costs).

VALIDATION

You can view the status of finance validations by clicking on the **Validation** tab. Depending on the validation template selected for a project; you will see one or more validation steps. Validation steps can be configured to be sequential or users can perform validations in any order. If configured, all required validations must have approvals before project closure.

Project roles that are configured as validation requestors can initiate a finance validation request. Project roles that are configured as validation approvers can approve a finance validation request. Project roles that can undo validations can click on the **Undo** button for a particular validation, so that the project manager can then restart the validation workflow.

History of all validations (request, approve and undo actions) is displayed in the **Validation History** table.

Depending on the finance template configuration, one of the validation steps might store current finances in **Finance Snapshot for Plan vs. Actual reporting**.

SETTINGS

You can view finance settings information for the project by clicking on the **Settings** tab. The top part of the screen displays various finance settings for the project, the bottom part of the screen displays the finance categories based on the finance template selected at project creation.

Difference finance settings are explained below:

- Include in Financial Calculations
  - If this flag is set to **Yes**, then project finances are included in financial rollups. By setting the flag to **No**, project managers can exclude project finances from rollups if they are still working on finalizing their numbers.
- Track Finances Monthly
  - If this flag is set, then project finances can be tracked on a monthly basis. If it is set to **No**, then finances can be tracked on annual basis.
- Use Global Lock Month
  - If this flag is set to **Yes**, then global finance lock is used. If set to **No**, then project level finance lock month is used to calculate Realized/Actual finances.
- Global Finance Lock Month/Project Finance Lock Month
  - Displays the relevant lock month used for the project
    - If the Use Global Lock Month flag is set to **yes**, then this field will contain the global lock month. This field is not editable at project level. Global lock month can be changed by finance Administrators.

- If the Use Global Lock Month flag is set to **No**, then this field will contain the project level lock month. Finance representatives need to update project level lock month as they validate their projects so that realized/actual finances are reflected correctly in financial rollups.

- Finances Locked Globally
  - If this field displays the value **Yes**, then global finance lock has been set by the finance Administrator and finances at project level cannot be updated.
- Project Finances are Unlocked
  - If the finances are locked globally and a particular project's finances need to be edited. Then as an exception, Administrators can unlock finances for that one project.
- Finance Start Date
  - If the finance window capability is enabled then finances can be tracked from the finance start date. By default the finance start date is set to the project close date.
- Finance Element Types
  - Finance element types allow you to define various financial elements and assign a rate per unit for that element. For example, you could define an element type called Man-Hours and assign it a rate of $20 per unit. This ability to create finance element types allows you to use financial and non-financial inputs to calculate financial savings. The defaults are defined by the system Administrator, but can be modified from the settings page by users with appropriate permissions.

The system allows you to apply multiplication factors for finance categories. E.g. Only 10% of all Working Capital may be counted as part of Savings. When entering data, users enter working capital numbers normally, but the system will rollup 10% of the total working capital on the **Financial Summary** page as well as in **Reports**. Weighting factors (e.g., WACC, Working Capital Multiplication Factor, etc.) can be applied to numbers before cumulative totals are calculated.

IMPORT AND EXPORT FROM AND TO MS OFFICE

EnterpriseTrack supports importing and exporting data to Microsoft Office applications and MS Project. Select Project Module Menu **(Project #) → Go To → Import/Export** or select the **Import/Export** link on the **Project** sub-menu to import or export project data.

The import/export process requires you to have the required application installed on your computer. It also requires an Oracle Instantis EnterpriseTrack plug-in to be downloaded and installed on your computer. You can click on the available downloads on the **Project**

Import/Export page and configure individual plugs-ins on your computer. After the plug-ins are installed, you can import or export project data.

The following import/export options are supported

- Import
    - You can import metrics data from Microsoft Excel
    - You can import project data from Microsoft Project
- Export
    - You can export metrics data to Microsoft Excel
    - You can export project data to Microsoft PowerPoint
    - You can export project data to Microsoft Project

Detailed instructions are provided on the **Project Import/Export** screen to guide you through the steps.

When you export project data to Microsoft PowerPoint, a PowerPoint storyboard will be generated. You can specify which project documents need to be exported to the storyboard by mapping the document to the storyboard from the Edit Project Document screen.

WORKING WITH IMPORTING AND EXPORTING FINANCIALS

You must first export the EnterpriseTrack framework of your financial information to MS Excel. You can then enter your data and keep track of your metrics in MS Excel. When you are ready to bring all your financial data into EnterpriseTrack you can use the **Import** feature on the **Project Financials** page.

If you use the import/export feature for your financials, the financial information within EnterpriseTrack will be displayed in read-only format.

EXPORTING TO AND IMPORTING FROM MICROSOFT PROJECT

You can export and import project data (tasks, resources, tasks assignments, dates/efforts/costs to and from Microsoft Project.

You must first download the required plug-in and have an MS Project template uploaded before importing/exporting the project data.

For more information on importing and exporting refer to the *EnterpriseTrack MS Project Integration Guide*.

Before exporting a project, you can choose to lock the project and export or, perform a read-only export. A read-only export allows you to export the project to MS Project without having to import it back into EnterpriseTrack. If you lock a project, no changes can be made to the project. You can make changes only when the lock is released. The project lock status is displayed on the **Project Import/Export** page. If a project is on-hold, you can only perform a read-only export.

PROJECT REPORTS

PRE-BUILT PROJECT LEVEL REPORTS

To access a project-specific report, navigate to **Project Reports** using **Project Module** menu **(Project #)** → **Reports**.

Report Name	Description
Control Plan Report	Lists all Control Plan type tasks for the project.
Executive Summary Report	Displays high level summary information on the project including executive summary notes.
Final Report	Summary document listing all key project details. Includes signature section for approvals.
Financial Detail Report	Reports on project related finance data.
Financial Plan vs. Actual Report	Comparison of plan numbers with actual results.
Gantt Chart Report	Displays project Gantt chart in report format.
Issues Report	Lists all project related issues and their resolution/closure status.
Notes Report	Aggregates all notes for the project.
Proposal Report	Displays project proposal/charter information.
Review Report	Lists tasks, deliverables, tools and issues.
Storyboard Report	Exports project data in XML format to Microsoft PowerPoint

STORYBOARD REPORT

From the **Project Reports** page you can create a storyboard with an overview of the project. You can choose from summary or detailed report and the project data is exported to Microsoft PowerPoint in XML format.

Click on the **Run** link associated with the Storyboard Report to display the **Set Storyboard Report Options** screen.

Click on the **Download Setup** button to download the Oracle Instantis Enterprise Track Connector for Microsoft Office. You will need to download this setup only once. Select the type of storyboard you want and press the **Run Report** button. You can chose to run or the save the file.

STATUS REPORTS

EnterpriseTrack makes it easy for you to create periodic status reports for each of your projects. You can save your status reports or you may be required to submit it to a manager or supervisor for approval.

WORKING WITH EXISTING STATUS REPORTS

To edit a status report, navigate to the **Status Reports** page by selecting Project Module menu **(Project #) → Go To → Status Report** within a particular project. Click on the **[Edit]** link in the **Actions** column of the appropriate week to edit the status report for that week. Click **[View]** to view the details of a status report.

CREATING A STATUS REPORT

Click the **Create** button on the **Status Report** screen. On the **Create Status Report** page, complete the fields that are editable. The system automatically generates some pre-selected information about the project for your report. Click **Save** to save your changes. Click **Submit for Approval** to send it to your manager or supervisor for approval. Click **Cancel** to leave the status report unchanged.

APPROVING STATUS REPORTS

If you are a manager, your responsibilities may include approving status reports.

To begin working with status reports, select Project Module menu **(Project #) → Go To → Status Report**. Select the **Status reports Submitted for my Approval** option from the pull-down menu. A list of all status reports that need your approval is displayed. Select the status report by clicking the **[View]** link in the **Actions** column. On the **Status Report Details** page, click the **Approve** button. Click **Reject** to send a status report back to the user for modification.

An email will be sent to the user when a status report is approved or rejected. Status reports will also be displayed in your **My Work** page.

STRATEGY (ALIGNMENTS) MODULE

EnterpriseTrack allows you to easily create a hierarchical map of strategies and align projects to it. You can use this module to track strategies, business objectives, Hoshins, Green Metrics, processes or any set of hierarchical business goals that have numerical metrics and aligned projects, ideas and documents. The word Strategy is configurable and your system may use the word Alignments or Processes or Goals etc. You can configure the system for up to 5 different Strategy (Alignment) modules.

In the sections below the generic terminology Alignment is used to describe this functionality.

ALIGNMENT MODULE DISPLAY

The Alignment module is made up of three panes – a **Tree** pane on the top left, a **List** pane on the top right and a **Properties** pane at the bottom.

→ Use this icon to maximize the size of each pane.

→ Use this icon to restore the pane to its original size.

TREE PANE

The tree pane displays the strategy tree. You can create new nodes, cut, copy and paste elements of the tree, and delete nodes from the tree using the icons displayed on this pane.

→ Use this icon to copy a node. Top level nodes cannot be copied.

→ Use this icon to cut a node. Top level nodes cannot be cut.

→ Use this icon to paste the node that you cut or copied.

→ Use this icon to delete a node. Only user-created nodes can be deleted. When a node is deleted, all its children (nodes) are also deleted.

→ Use this icon to expand the complete strategy tree.

Status and **Trend** indicators for the primary measure of the node are displayed within the tree pane for each node. The risk indicator for the node is also displayed here. Risk indicators are set manually.

LIST PANE

The list pane displays the child nodes of the currently selected node in the tree pane. Click on an item in the list to view its properties in the properties pane.

PROPERTIES PANE

The properties pane displays the properties of the selected node.

 → Click this icon to edit the properties.

 → Click this icon to save changes.

 → Click this icon to leave the properties unchanged.

If you have selected a node from the tree pane, the child nodes are displayed in the list pane and its properties are displayed in the properties pane. Click on the child node in the list pane to view the properties of the child, or expand the node in the tree pane and then select the name of the child node.

ALIGNMENT NODE DISPLAY AND PROPERTIES

When you click on a particular alignment node, the properties page shows the details of that node in tabs. The tabs display the following information.

GENERAL TAB

This tab displays information such as the name, type and status of the strategy node. If a node is made Inactive, then the node and its child nodes are not included in the roll-up logic. You also define the tracking frequency - i.e., how often you want the data to be tacked for this particular strategy. If the tracking frequency is set to be non-recurring, it can only have one value. If it is recurring, the data can be tracked on a monthly or yearly basis.

MEASURE TAB

From this tab you can specify the measures or metrics being tracked by this strategy node. Each node can have multiple measures. There must be at least one primary measure. Each measure can have a time series, (depending on the tracking frequency that was chosen), with two data streams, one for plan data and one for actual data. This time series can then be used for plotting charts of Plan vs. Actual data.

You can separately define how the plan and actual data for each node should be calculated. For example – plan data may be entered manually, while the actual data may be derived from a formula or through organization roll up. Depending on your choice, you will have to define additional parameters for the choice of data. E.g., if you set the actual data to be Project Finances, you will have to further define whether the Finance Category should be Expenses or Savings and whether the operation performed should be to calculate an average or a sum.

Computed measures can only use measures that come before it in the sort order. E.g. M3 can use M1 and M2 in its computation, but not M4. You can also use measure of child nodes. Allowed operators for calculations are +, -, /, *, ^.

Since computed measures can only use measures that come before it in the measure sort order, you may need to modify the sort order of the measure. To do this, navigate to the appropriate node and click on it. In the **Edit** mode of the **Properties** pane, click the **Measures** tab. Use the up and down arrows to move measures up and down.

To set the status indicators for a measure, first click the **Measures** tab within the **Properties** pane of the appropriate node. Select the measure for which you want to set the status indicator and click the **Edit** link in the **Actions** column. Click the **Status Indicator** tab. Choose the appropriate status indicator from the pull down menu. Define whether the status type is manual of computed. If computed, specify whether you want to compute the status based on Plan, Actual or Variance or % of variance. Also define lower and upper level values for each level within the indicator.

You can edit the data for each measure from the Measures tab within the Properties pane of the appropriate node. Click the **Data** link in the **Actions** column of each measure to view and edit the data for each measure. You can also select the **Data** tab within the **Properties** pane of the appropriate node to view and edit the data for all the measures from one location.

PROJECT TAB

On this tab you can define the projects that are associated with this node. Projects can also be associated with strategies from the **Project Details** section of EnterpriseTrack.

You can edit the percent contribution of each strategy (for a particular project) by clicking the **Edit Contributions** button. To view the details of each strategy, click the **[View]** link in the **Actions** column. You can view details of the strategy including a list of projects associated with it, and view links to associated ideas and proposals/charters. You can also view a report about the strategy.

LINKS TAB

This tab displays separate tables for links to ideas and proposals/charters. You can modify the ideas and proposals/charters to which this node is linked.

When the system is deployed, two default top levels of the hierarchy tree are pre-defined - Corporate and Organization. New Strategy nodes can be created within each tree. Your company's organizational hierarchy is displayed within the Organization tree.

REPORT TAB

On this tab you can run the strategy rollup report or the strategy detail report. You can display the data in a table format or as a chart. If you select **Yes** to **Display all levels under current node**, then all nodes under the current node is used to display the report. You can also view the path information on the report. Select your options and click on the **Run Report** button.

ADDING AN ALIGNMENT TO A PROJECT

To add a strategy to a project, click the **Add Strategy** link on the **Strategic Alignment** page. The strategy tree can be expanded by clicking the **[+]** next to the strategy categories.

Select the strategy you wish to associate with the project and click the **Add** button. The strategy is added to the list on the **Strategic Alignment** page.

FIELD CHANGE HISTORY

EnterpriseTrack monitors important fields and maintains a detailed history of changes made to them. You can filter, group, print, and export to Excel the contents of this list. The following table lists the fields that are currently tracked:

Proposal Fields	Project Fields
Basics: Status, Roadmap	Basics: Status, Roadmap
Finance: Initial Finance Fields (Varies based on your Finance Template Configuration)	WBS and Non-WBS: Name, Status, Resources, Plan Start, Plan Completion, Actual Start, Actual Effort, Actual Completion, % Completion
Dates: Planned Start Date, Actual Start Date, Planned Project Close Date	Dates: Actual Start Date, and Planned Project Close Date
Approvals: Sign-off Status	

You cannot disable this feature.

VIEWING FIELD CHANGE HISTORY FOR PROPOSALS

1. Navigate to the **Proposals** page (**Go To →Proposals**), or select **Proposals** from the Left Navigation Bar.
2. Select a proposal.
3. From the **Proposal #** menu select **Field Change History**. The *Field Change History* page is displayed.

VIEWING FIELD CHANGE HISTORY FOR PROJECTS

1. Navigate to the **Projects** page (**Go To →Projects**), or select **Project** from the Left Navigation Bar.
2. Select a project.
3. From the **Project #** menu select **Go To →Field Change History**, or click the **Field Change History** icon on the Left Navigation Bar. The *Field Change History* page is displayed.

TIMESHEETS

You can maintain timesheets for users using EnterpriseTrack. Select **Go To → Timesheets** to begin working with timesheets. Select **My Timesheets** from the **Quick Filters** pull-down menu to view your timesheets. To edit a timesheet, click on the **Edit** link in the **Actions** column of the appropriate week. Click the **View** link to view the details of a timesheet.

CREATING NEW TIMESHEETS

To create a new timesheet click the **Create New Timesheet** button.

On the **Create Timesheet** page, select the week for which you want to compete your timesheet. You can type in the dates or use the calendar.

You can also use the (previous) and (next) buttons to move to the previous or next week. All projects that you work on will be displayed, broken out into general project related activities (like meetings etc.) as well as specific deliverable and task related activities. You can also report non-project related time as well as non-working time.

To create a new timesheet:

1. Click the **Timesheets** link in the Left Navigation bar, or select **Go To →Resources →Timesheets** from the Top Navigation bar.
2. Click the **Create New Timesheet** button. The *Create Timesheet* screen is displayed.
3. Type in the dates or use the calendar to select the week for which you want to complete your timesheet.

4. Enter any non-project related time (Administration, Training, Recruitment, etc.) and non-working time (holiday, paid time off, unpaid time off).
5. Enter the Estimated Time to Complete (ETC) for each activity. If you are working with multiple team members on this activity, you should enter the ETC for your portion of the activity and not for the entire activity. This field is visible only if your Project Manager has enabled it.
6. Add a note by entering it the box provided.
7. Click **Save** to save your changes.
8. Click **Submit for Approval** to send it to your manager or supervisor for approval. Timesheets submitted for approval are displayed with the text **Pending for Approval** in the status column.
9. Click **Cancel** to leave the timesheet unchanged.

WORKING WITH EXISTING TIMESHEETS

To edit a timesheet:

1. Click the **Timesheets** link in the Left Navigation Bar, or **select Go To →Resources →Timesheets** from the Top Navigation Bar.
2. Select **My Timesheets** from the *Quick Filters* pull-down menu and click **Go** to view your timesheets.
3. Select a week and click the **Edit** link.
4. Enter the Estimated Time to Complete (ETC) for each activity. If you are working with multiple team members on this activity, you should enter the ETC for your portion of the activity and not for the entire activity. This field is visible only if your Project Manager has enabled it.
5. Add a new note by entering it the box provided.
6. Click **Save** to save the timesheet or click **Submit for Approval** to submit the timesheet for approval.

APPROVING TIMESHEETS

If you are a Resource Manager or Project Manager, your responsibilities may include approving timesheets. The timesheets that require your approval are displayed on your **My Work** page. You can also view them by clicking the **Timesheets** link in the Left Navigation bar, or by **selecting Go To** > **Timesheets** from the Top Navigation bar. Select the **Pending my approval** option from *Quick Filter* pull-down menu.

The *Status* column displays the status of the timesheets (Approved, Pending Approval, or Rejected). You cannot edit timesheets with the status *Pending Approval* and *Approved*. Rejected timesheets can be edited and resubmitted for approval.

To approve or reject timesheets:

1. Navigate to **My Work** by clicking the **My Work** icon on the Left Navigation bar, or select **My EnterpriseTrack > My Work** from the Top Navigation bar.
2. You will see a list of timesheets that require your approval. Select the timesheet by clicking the **View** link in the *Action* column.
3. You can use the **Approve All** or **Reject All** buttons to approve or reject the entire timesheet. Click **Ok** to confirm the approval or rejection.
   Or
   Click the **Approve All**, **Reject All**, or **Reset** icons next to the *Status* column header and click **Submit**.
   Or
   You can select individual line items to approve or reject. Select **Approve** or **Reject** from the *Status* column drop-down menu for each line item. Click **Submit**.

- You can only approve or reject items that are applicable to you.
- An email will be sent to the user when a timesheet is approved or rejected.

USING TIMESHEET SETTINGS

As a Project Manager, you can set timesheet settings for each individual project you manage. These settings allow you to:

- Enable the Estimated Time to Complete (ETC) field.
- Set ETC as a mandatory field while completing timesheets.
- Specify the allowed grace period for timesheet reporting.

To specify timesheet settings:

1. Navigate to the **Project Settings** page by clicking **Project # →Go To →Settings** within a particular project, or select the **Settings** link on the Left Navigation Bar.
2. Click the **[Edit]** link next to Timesheets. The *Timesheet Settings* page is displayed.
3. Choose if you want to enable ETC.
4. Choose if you will require team members to enter the ETC for activities before submitting their timesheet.
5. Specify how many days before the activity start date can team members start reporting effort.

6. Specify how many days past the activity completion date can team members continue to report effort.
7. Click **Save**.

If an activity has AET set to **Timesheet** and, it does not have a closed date or a plan start date, then it is always available in Timesheets for reporting.

KNOWLEDGE BASE

Documents (and tool templates) are stored in EnterpriseTrack with two levels of association – some documents are associated with specific projects, and others are stored outside the context of any single project. Select **Go To → Knowledge Base** from the Top Navigation Bar.

You can set up your system to lock documents or templates when a user is accessing them. With appropriate permissions you can unlock documents.

Both Global Documents and Tool Templates belong to specific initiatives.

KNOWLEDGE BASE TREE NAVIGATION

The Knowledge base module is made up of three panes – a Tree pane on the top left, a List pane on the top right and a Properties pane at the bottom.

→ Use this icon to maximize the size of each pane.

→ Use this icon to restore the pane to its original size.

TREE PANE

The tree pane displays the knowledge base tree. You can create new folders (or nodes) in the tree, cut, copy and paste elements of the tree and delete folders from the tree using the icons displayed on this pane. Folders can contain documents or templates.

→ Use this icon to create a new folder.

→ Use this icon to copy a folder.

→ Use this icon to cut a folder.

→ Use this icon to paste the folder that you cut or copied.

→ Use this icon to delete a folder. When a folder is deleted, all its children (nodes - i.e. any folders, documents and templates within it) are also deleted.

→ Use this icon to expand the complete knowledge base tree.

LIST PANE

The list displays the child nodes, i.e. (the documents and templates) of the currently selected folder in the tree pane. Click on an item in the list to view its properties in the properties pane.

→ Use this icon to add a new document.

→ Use this icon to add a new template.

PROPERTIES PANE

The properties pane displays the properties of the selected document or template.

→ Click this icon to edit the properties.

→ Click this icon to save the changes.

→ Click this icon to leave the properties unchanged.

If you have selected a node (i.e. folder) from the Tree pane, you will see its children in the List pane and its properties in the Properties pane. To view the properties of the child (i.e. the document or template), you must click on its name in the List pane.

RESOURCES

From the Top Navigation Bar select **Go To → Resources** to open up a complete directory of users in the system along with their contact information and allowed roles. You can view, request and approve resources and configure to view your resource plan, or your team's resource plan. You can also view and analyze how each user's time is being utilized. Click on any name to view detailed information about the resource.

RESOURCE SEARCH

On the top of the page you can search for resources by typing any part of their name, or use the Advanced Search… option for more refined searches. You can also save your searches to use later. 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.

RESOURCE LISTING

The **Resource Listing** page displays all resources in the system. Use the **Create** drop-down menu on the top right to add resources. For more information, see **Project Resources**. From the **View** menu, you can select **Columns** to display the columns you want to view. You can also choose to view the filter row and the print and data toolbar. You can save these view settings for yourself, or for all users, or for users with a certain Access Profile by selecting the **Save View Settings** option. From the **Data** menu, you can use the Group by, or the Pivot functionality. You can also print or save the data to Excel.

When you are working on the **Resources** page you can choose how you want to view the resource details. You can choose to view it within the main page, or as split page or on a separate pop-up window. From the **View** menu select **Resource Display Mode** and select **Main Page**, **Split Page**, or **Popup Page**.

Oracle recommends you select the **Popup Page** option.

From the **Action** drop-down menu associated with each resource, you can select, edit, copy or delete resources.

GENERAL

From the **General** tab, you can view the status and count of all projects, activities, documents and pre-projects associated with the selected resource. You can also view general information about this resource.

UTILIZATION

From the **Utilization** tab, you can view the resource utilization chart and the planned versus actual utilization of this resource.

GANTT

You can view the Gantt chart for all activities or tasks associated with a resource. You can view the plan versus the actual dates and the percentage complete for each activity.

HEATMAP

You can view the pending requested effort (RQ), the committed effort (CM), the actual utilization and the committed effort as a percentage of capacity (CM/CP %) for each resource.

ASSIGNMENTS

You can view assignments associated with a resource. The name, project ID, status, start and end dates and the plan effort, actual effort and remaining effort associated with each project are also displayed.

CALENDAR

From this tab you can view and edit the calendar associated with a resource.

RATE

From this tab you can view the setup rate, overtime rate and standard rate for the selected resource.

EXPERTISE

This tab displays the areas of expertise for the selected resource.

CERTIFICATIONS

From this tab you can view the type of certificates, the date they were acquired, the status and the start and end date of training that this resource has received.

WORKING WITH A RESOURCE CALENDAR

You can edit a resource calendar by changing the reference calendar, work hours, work days or by adding, modifying or deleting calendar exceptions.

You must have the **Edit All Resource Calendar** and Edit Resource permissions to edit a resource calendar.

MODIFYING WORK HOURS OR WORK DAYS

To modify works hours or work days:

1. Navigate to the *Resource Listing* page (**Go To →Resource→Listing**).
2. Select a resource and from the **Actions** menu select (**Actions →Edit → Calendar**).
3. Click the **Edit** button.
4. Enter the number of work hours.
5. Click to select the work days.
6. Click **Save**.

ADDING EXCEPTIONS

To add a calendar exception:

1. Navigate to the *Resource Listing* page (**Go To → Resource→ Listing**).

2. Select a resource and from the **Actions** menu select (**Actions →Edit →Calendar**).
3. Select a date by clicking on it. You can use the tabs to navigate to a different month or year. The *Manage Exceptions* pop-up window displays.
4. Enter a name for this exception.
5. Select if you want to set it as a working day or a non-working day.
6. Click **Save**.

DELETING EXCEPTIONS

To delete a calendar exception:

1. Navigate to the *Resource Listing* page (**Go To →Resource→Listing**).
2. Select a resource and from the **Actions** menu select (**Actions →Edit →Calendar**).
3. Click on the exception to select it. The *Manage Exception* pop-up window is displayed.
4. Click **Delete**.

RESOURCE PLANNING

The **Resource Planning List** page allows you to plan and manage your resources time and effort. It provides a snapshot of all your team members and the projects they are working on. The cost, required effort, committed effort and the duration of the projects are also displayed. You can use this to view resources that are over-committed or under-utilized. The **Resource Planning List** page also displays your resource plan, the resource plan for all resources and the approvals that are pending your approval.

When you select a resource you can view the projects, status, duration, committed effort and requested effort associated with the resource for each week of the project. From the **Actions** drop-down menu you can edit the team member information, or view and edit the finances associated with the resource, or reassign activities to another team member.

To reassign an activity, from the **Reassign Activities/Issues** screen, select a resource from the drop-down menu and click the **Reassign** button.

If you select an allocation from the **Resource Planning List** page, then from the **Actions** drop-down menu you can add, edit, submit, delete withdraw, reopen, and release allocations. You can also view and edit the allocation effort. For more information on working with allocations, see *Request for Resource Allocation*.

From the **Saved Search** drop-down menu, you can choose to view your resource plan, your team's resources plan, or the plan for all resources. You can also view the approvals that require your approval. Select the resource and from the **Actions** column choose to approve or deny the request.

You can also choose to view the resource plan broken down into months or weeks by clicking the **Advanced Search...** button and changing the *Display Frequency* filter.

WHAT-IF

The What-if Planning module in EnterpriseTrack allows you to view, with the use of extensive filters, projects that are underway and the impact that these projects have on roles/resources. As Portfolio Managers you can use this module for Capacity Planning of Resources and also as a convenient way to see Resource utilization reports, which are similar to heat maps. Using this key module you can now view the effort (demand) associated with projects and the availability (or utilization) of the corresponding Resources (or Roles) side by side on the same screen. The What-if screen allows you to create scenarios where you can try out numerous "what-if" edits, in a dynamic and interactive way, to gauge the impact these changes will make on your projects or resource availability. The changes you can make include shifting the projects/proposals; cancelling projects/proposals and changing the required effort for a particular time period. These changes can be done at the Project level, the role level or at the resource level.

Each scenario starts off with setting filters that you can use to select a set of projects and proposals/charters that are of interest. On the What-if screens you can view a comprehensive list of all resources associated with the projects that met you filter criteria. The resource requirements (effort, costs) of these projects and proposals/charters (by month or week) are displayed in aggregate. You can drill down by expanding the lists.

Two views are shown – one by Resource at the top level and one by Role at the top level. The What-if module only shows the efforts from the Allocation slots on the Projects and not from the efforts on resources assigned to activities in the WBS. You can create multiple such scenarios for comparison and you can share them with other team members. You can also refresh the scenario to reload real-time proposals/projects and role/resource allocations.

The changes you make to projects in the What-If screen will not affect your actual projects.

The following list describes the menus, and control options you will see on the What-if View Scenarios screen:

- Select Scenario

  From this pull-down menu, you can select from your saved or shared scenarios.

- Scenario

  From this menu you can create, delete, save as, or refresh your scenarios. The **Save As** option makes a copy of your scenario. The Clear All Changes option clears all changes you have made. The **Refresh** functionality allows you to re-load real-time proposal/project and resource data as needed into an existing scenario, without losing the shifts that have been added.

- Edit

  From the **Edit** menu you can make changes to the General, Sharing, Filters, and What-if tabs.

- Views

  From the **View** menu, you can display toolbars at the Top banner, and the Left Navigation bar. You can also save your settings.

- Data

  From the **Data** menu, you can select the columns you want to view. You can also print and save to Microsoft Excel.

You will see the tabs listed below on the **What-if View** screen when you create or edit a scenario. The active tab is highlighted, and when you are in the Edit mode, the tab you are editing is highlighted. You can navigate to the other tabs but you can only edit the highlighted tab. The cells you can edit are highlighted in pink.

- General Tab

  You can view and edit the name and description of the scenario. You can also select a default scenario.

- Sharing Tab

  You can share the scenarios you have created with other team members using the Sharing tab.

- Document Tab

  You can upload documents from this tab.

- Filters Tab

  On this tab you can view and edit the filters used to create a scenario. You can use the extensive set of filters provided on this tab to narrow the projects and proposals/charters you want to use to build your scenario. You can also select the time frame you are interested by selecting the dates and by selecting the time unit to display (months or weeks). You can also choose to include requested allocations and committed allocations while building your scenario. On this tab, you can set the columns you want to view on the What-if tab (effort, total capacity, the total utilization as a percentage, resource availability, the availability percentage, and the associated cost). You can also select what you want to see on the bottom grid of the What-if screen availability by resource or availability by roles.

- What-if Tab

  On this tab you can view and manipulate your scenarios by excluding projects, and by editing or shifting hours that a resource uses on a project. The columns you see on this tab are based on the options you selected in the Filters tab. When you are in the edit mode, the cells you can edit are highlighted in pink and the cell you are editing is also highlighted. As you make changes to the top half of the grid, you will notice instant changes to the bottom grid showing the impact of these changes. The Utilization, Utilization %, Availability, and Availability % columns are color coded (red, yellow, and green) based on built-in ranges. The scroll bar under each grid scrolls left to right within a page. Any changes you make on this tab will not affect your original projects.

Parameter	Description
Select date	You can select the date you want to view from within the time frame you set in the To and From Date filter.
	Allows you to page through columns. If you selected 6 columns per page and you have more than 6 columns then this clicking on this scroll buttons allows you to view the other columns by going to the next page. Both the top and bottom grids are always aligned by month (or week) even when they have different columns based on your filter settings.
	Expand and collapse a row.
	Provides additional information on the project.
Priority	The priority number of the project. This number comes from the evaluation score of the proposal.
Exclude	Shows projects or resources that are excluded. In the edit mode you can check this column to exclude a resource out of a project.
Shift	Allows you to shift a project by weeks or months.
E	The total effort.
CP	The total capacity.
U%	The total utilization as a percentage.
A	The resource availability.
A%	Availability percentage.
Cost	The associate cost.

CREATING A SCENARIO

To create a new What-if scenario, do the following:

1. Select **Go To** > **What-if** from the Top Navigation bar.
2. From the **Scenario** pull-down menu select **Create**. The **What-if Create Scenario** screen is displayed.
3. Select the **General** tab and enter a name and description for this scenario. You can also choose if you want this to be the default scenario.
4. Select the **Filter** 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.
5. From the **Display Options** section, select the time unit (Week or Month).
6. Enter the dates. This is the time period you are interested in planning for.
7. From the **Availability display in What-if** pull-down menu, select if you want to view the availability of roles or availability resources in the **What-if** screen. What you select here is displayed in the bottom grid of the **What If** screen.
8. Choose if you want to include requested allocation and committed allocations.
9. Select the number of columns per page you want to view. If the time period you selected is 12 months and the columns per page is 6 then the scroll button is enabled. On the **What-if** screen you can use the scroll buttons to scroll to the next page for the other 6 columns.
10. Enter the options you want displayed in the What-if table. You can choose to view the efforts, capacity, utilization %, availability, availability %, and the resource cost. You can also select the number of rows per page.
11. Enter the options you want displayed in the **Availability by Roles** table. You can choose to view the efforts, capacity, utilization %, availability, availability %, and the resource cost. You can also select the number of rows per page.
12. Enter the options you want displayed in the **Availability by Resources** table. You can choose to view the efforts, capacity, utilization %, availability, availability %, and the resource cost. You can also select the number of rows per page.
13. You can further filter on pull down status, initiative, project basics, project dates, project organization hierarchy, project classification fields, finances, alignment tree, proposal classification fields, resource filterable custom fields, and resource organization hierarchy.
14. Click the **Save** button to save your scenario.

EDITING SCENARIOS

SHIFTING PROJECTS/PROPOSALS OR ROLES/RESOURCES

You can shift projects, proposals/charters, roles, or resources from the What-if tab on the What-if View Scenarios screen. Shifting projects/proposals allows you to dynamically see the roles/resource availability impact based on the shift. If a role's (e.g. QA Engineer) available capacity for one particular week is low, then shifting the project start date by a week could help free up the capacity of that role.

1. Select the scenario you are working on from the **Select Scenario** drop-down menu.
2. From the **Edit** menu select **What-if** to begin editing the What-if tab.
3. Ensure that you have a date range set in the filters for which your projects in the (upper) What-if grid has efforts associated with it (not all zeros). In the lower Grid, you can then see the resources and their effort, availability, and utilization (as set up by your filters).
4. From the top grid select the project/proposal or resource/role and enter the number of weeks or months under the **Shift** column. The change is immediately reflected in the table below. Shifts are integer units of months or weeks based on the column display set in the **Filter**. The project shift is absolute and always based on the start date. Role shifts are based on top of project shifts.
5. After you have finished making changes you can save the scenario by selecting **Scenario > Save**. You can also make a copy of these changes into a separate scenario using **the Save As option (Scenario > Save As)**.

EXCLUDING/INCLUDING PROJECTS OR PROPOSALS/CHARTERS

You can quickly exclude or include projects based on the evaluation score of projects/proposals. The least important projects/proposals can be excluded to ensure resources are available for more important projects/proposals.

1. Select the scenario you are working on from the **Select Scenario** drop-down menu.
2. From the **Edit** menu select **What-if** to begin editing the What-if tab.
3. In the lower Grid, you can then see the resources and their effort, availability, and utilization (as set up by the filters). Look for a resource that is over-utilized – either with the utilization showing red or the availability showing red. Now expand on that user to see the projects are causing the overutilization.
4. From the upper grid manipulate that project by checking the **Exclude** column. You will see that this project and all its associated effort is grayed and italicized to show exclusion. The lower grid will immediately reflect the change.

5. After you have finished making changes you can save the scenario by **selecting Scenario >** **Save**. You can also make a copy of these changes into a separate scenario using the **Save As** option **(Scenario > Save As)**.

EDITING HOURS

You can edit the resource hours within the grid to quickly see if there will be a resource impact and to see if there is enough capacity available for a particular time frame.

1. Select the scenario you are working on from the **Select Scenario** drop-down menu.
2. From the **Edit** menu select **What-if** to begin editing the What-if tab.
3. In the lower Grid, you can then see the resources and their effort, availability, and utilization (as set up by the filters). Look for a resource that is over-utilized – either with the utilization showing red or the availability showing red.
4. From the top grid select the resource and change the effort associated with this resource for a selected timeframe. The grid below shows the impact in real time.
5. After you have finished making changes you can save the scenario by selecting **Scenario >** **Save**. You can also make a copy of these changes into a separate scenario using the **Save As** option **(Scenario > Save As)**.

SOCIAL STREAM

The Social Stream module allows seamless communication, collaboration, and social networking among project team members. Team members can now easily share ideas, opinions, comments or messages by subscribing to social streams. You can also view timely user and system generated messages, alerts, notifications, and comments associated with your projects.

SUBSCRIBING AND UNSUBSCRIBING

- To subscribe to a Social Stream:

  Click the icon next to a project, proposal or idea from either the Stream Ticker, listing pages (Project Listing Page, Proposal Listing Page, and Ideas Listing Page), the Social Stream page, or from the Project Basics page. The star turns yellow indicating that you have successfully subscribed into its social stream.

- To un-subscribe from a Social Stream:

  Click the icon next to a project, proposal, or idea from either the Stream Ticker, listing pages (Project Listing Page, Proposal Listing Page, and Ideas Listing Page), the Social Stream page, or from the Project Basics page. The star turns grey to show that you have been un-subscribed from that social stream.

VIEWING THE SOCIAL STREAM PAGE

The Social Stream page displays messages and comments associated with all social streams. To view the **Social Stream** page, from the Top Navigation Bar select **Go To** > **Social Stream**.

DISPLAYING THE SOCIAL STREAM TICKER

The social stream ticker is displayed just under the top banner. Depending on the filters used, it displays the latest messages from all social streams. It is usually refreshed every minute. From the ticker you can filter messages, create a new message, or comment on a message.

- To display the social stream ticker:

  From the Top Navigation Bar select **View** > **Display Steam Ticker**.

- To expand the ticker click the **Toggle** icon

USING THE SOCIAL STREAM

FILTERING MESSAGES

You can filter the messages by clicking the **Filter** button.

Filter	Description
My Messages	Shows the main messages posted by you. It includes comments associated with those messages.
My Subscriptions	Shows all messages and system event updates on the social streams you have subscribed to.
Specific Project	Shows messages and system event updates related to a specific project
Specific Proposal	Shows messages and system event updates related to a specific proposal.
Include New Ideas	Click the box to include system event updates on new ideas creation.

Filter	Description
All Messages	Clears all filters and shows all messages including non-subscriptions.

REFRESHING MESSAGES

Click the **Refresh** button to update the *Social Stream* page with the latest events or messages.

POSTING A NEW MESSAGE

To post a new message, click the **New Message** button. Type your message and click the **Send** button. If you are within a Project, Proposal, or Idea then the message is automatically associated with it. To post a public message click the **Create a new public Message** button from the *Social Stream* page or from any of listing (Project listing, Proposal listing, or Idea listing) pages.

COMMENTING ON A MESSAGE

To comment on a message, start typing in the **Write a Comment** box and click the **Send** button. Press the **Enter** key to add a new line.

VIEWING COMMENTS

To view the comments associated with a message, click the **View Comments** link.

PROJECT STREAM SETTINGS

As a Project Manager you can enable some or all project level event notification to be streamed or emailed.

To set project events to be streamed, do the following:

1. From the **Project Module Menu** select **(Project #) Go To > Settings**.
2. From the **Project Settings** screen, click the **[Edit]** link under the **Action** column next to each notification.
3. From the **Edit Notification** screen, select **Enable Social Stream**.
4. Click the **Update** button.

PROGRAMS

EnterpriseTrack enables program management by creating project groups associated with programs and then monitoring the progress of programs. You can choose to create program groupings based on corporate mandates, strategic focus areas, etc. This is a way to link projects to strategies. You can add, edit, and delete programs only if you have permissions to do so.

Click the **Create a New Program** button to create a new program with existing projects. Enter a name and budget for the program. Select projects you want to link with this program and click on the **Create** button. You can select the **Filter** link to add or restrict projects

For more information on a program, select the link associated with the program. The **Program Basics** screen is displayed. You can view all the projects associated with this program and a summary of the program.

To edit a program, click on the **Edit Program** button. From the **Edit Program** screen, make all the necessary changes and click on the **Update** button. You can also delete a program by pressing the **Delete** button.

DASHBOARDS

From the Top Navigation Bar select **Go To → Dashboards → View**. If you have the permission to view Dashboards, you will see Project Dashboard and/or Executive Dashboard.

The Executive Dashboard will show you 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

You can also create your own dashboards in the User-defined dashboards section.

Refer to the *Dashboards and Reports User Guide* for detailed information on working with Dashboards and its components.

CREATING YOUR OWN DASHBOARDS

You can create custom layouts by using the drag-and-drop feature to select components from the layout gallery. To begin creating your dashboard, click on the **Manage Dashboards** button on the **My Dashboards** page. In the **Tree** pane, click on the **My Dashboard** link and then click the **Add** icon. In the **Details** pane, enter a name for your new dashboard. You can enter a description and also specify if you want this dashboard to be your default dashboard.

Click the **Save** button to save your dashboard. Once you have saved your dashboard, you can add individual components to your dashboard.

Begin by clicking click on the name of your dashboard in the **Tree** pane then click on the **Edit** button in the **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.

In the new window that opens, select the components from the gallery and drag it into the layout grid. You can select a category from the **Category** pull down menu to see all the components in a particular category.

To remove components from your layout, drag it into the trash area.

Once you have selected all your components, click the **Save Layout** button.

In the **List** pane, select the first component by clicking on its name. Modify the name, description etc. and define the filtering criteria for that component by clicking the **Edit** button in the Details pane. Once you have made the changes click the Save button to save your changes.

SHARING DASHBOARDS

Based on your permissions, you may be able to share a dashboard. To share a dashboard, from the **Manage Dashboards** page, select the dashboard, and in the **Details** pane, click the **Shared** tab. Click the **Edit** button and select the dashboard you want to share and the users with whom you wish to share the dashboard.

You can specify a 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.

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.

- Various parameters can be used as 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 X and Y axes can be swapped for a visual rearrangement of the bubbles.
- The size of the bubbles can be driven by various parameters. This can be fixed size or be based on effort, team members (including and excluding TBD), and finance aggregate.
- The color of the bubbles can be driven by various parameters. The bubble color can be fixed or 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.

Refer to the *Dashboards and Reports User Guide* for detailed information on working with Bubble Charts.

REPORTS

Two levels of reports are available in EnterpriseTrack – project specific, and across projects. You can access the cross-project reports from the Top Navigation Bar by selecting **Go To → Reports → Standard** or **Ad-hoc** or **Custom**.

The sections dealing with reports and dashboards are meaningful only with data in your system. If your system is yet to be populated with data related to ideas, proposals/charters, projects, financials etc., please re-visit these sections after that has been done). Visit each report to see what it displays (again, this is likely to be meaningful only after a few projects have been entered). 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 will be displayed – **Standard Reports**, **Ad-hoc Reports** and **Custom Reports**. The Custom Reports link will be displayed only if there are any custom reports configured for you system.

Refer to the *Dashboards and Reports User Guide* for detailed information on working with reports.

STANDARD REPORTS

By default the screen will display **Standard Reports** which are all the predefined reports available in the system.

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.

The three Finance Aggregate Reports (Project Finances Group Aggregate, Project Finances Element Aggregate, and Project Finances Element Monthly Detail) 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.

For more information on working with Finance Aggregate Reports, refer to *the Dashboard and Reports User Guide*.

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.

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.

Refer to the *Dashboards and Reports User Guide* for detailed information on using and creating User-Defined Excel reports.

AD-HOC REPORTS

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

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.

Refer to the *Dashboards and Reports User Guide* for detailed information on working with Ad-hoc reports.

MESSAGES

EnterpriseTrack allows users with appropriate permissions to send broadcast messages to other users in the system. Messages can be sent to users based on their access profile. You can also choose to send messages to all users who are part of one or more initiatives. Messages can be set to expire at a specific time. Expired messages are stored in the system and can be accessed through the user-interface.

Recipients of the message will be able to view their messages in the **My Messages** section of EnterpriseTrack.

By default the **Messages** page displays all your messages that have not expired. You can view expired messages by clicking the check box next to **Display Expired Messages** and clicking the **Go** button. To view messages created by someone other than you, click the check box next to **Display Messages Created By Others** and click the **Go** button.

CREATING A NEW MESSAGE

To create a new message, navigate to the Messages section by selecting **Go To → Messages** from the Top Navigation Bar. Click the **Create a New Message** button.

On the **Create Message** page select the access profiles of the users to whom you want to send the message. If no access profile is chosen, the message will be sent to all users irrespective of their access profile. Select the initiative with which you want to associate this message. When you select an initiative, only users who are part of that initiative will receive the message. If no initiative is chosen, the message will be sent to users irrespective of the initiative with which they are associated. Type the content of your message in the **Message Description** field. You can also attach a document to your message. Users will be able to view and download attached documents. You can set a time and date when then message will expire. Once a message expires, it will not be displayed in the **My Messages** page. Click the **Save** button to create and send your message.

SURVEYS

CREATING A SURVEY INSTANCE

Before you create as survey instance, make sure that the survey template you want to use for this particular survey has already been created. The survey template contains the actual questions and the rating groups to be used in the survey.

To create a new survey instance, navigate to the Survey Management section by selecting **Go To → Survey Management** from the Top Navigation Bar. Click the **Create Survey Instance** button on the **Survey List** page. On the **Create Survey** page enter a name for the survey, select a survey template, and enter the date on which you want to conduct the survey. Emails will be sent out to the recipients on this date. Surveys will also be displayed in the **My Work** page of the recipients. You can enter an expiry date for the survey. If you define an expiry date, recipients of the survey will not be able to submit responses after this date. You can define the total number of recipients for the survey as well as the minimum number of responses that are required for the survey to be considered in reports. Select the name of the recipients (Control-click to select multiple names) and then click the arrow button to add new recipients to the survey. Click the **Create** button to create your survey.

SURVEY REPORTS

EnterpriseTrack comes with standard survey reports that allow you to view and analyze the responses.

To view the survey reports, navigate to the **Survey Management** section by selecting **Go To → Survey Management → Reports** from the Top Navigation Bar.

The following reports are available:

- Summary and Detail Reports

  You can view summary and detailed information about responses using this report.

- Respond Trend report

  The output for this report is a bar chart showing the trend in the responses for the selected surveys.

- Average Response

  The output for this report is a bar chart showing the response averages for the selected surveys.

When you click the **Run** link, for any of the above reports, you can choose the date range over which the survey was run, the template for which you would like to run the report and the survey instances you want included in the report, based on status.

WORKING WITH SURVEY QUESTIONS

Survey templates are made up of individual questions that are grouped into sections. EnterpriseTrack comes with a question bank to get you started. You can modify the existing questions by editing them. You can also use the **Save As** function to create new questions that are similar to the existing ones.

On the **Questions** page you can you can edit, delete and deactivate individual questions. Deactivated questions will not be available for use in survey templates.

EDITING A QUESTION

Click the **Edit** link in the **Actions** column of the question you wish to edit. Make the required changes on the **Edit Question** page and click the **Save** button to save your changes.

DELETING AND DEACTIVATING A QUESTION

To delete the question that you created click the **Delete** link in the **Actions** column of the question. Questions that come with EnterpriseTrack cannot be deleted. You can also retain the question but not have it be active and available by clicking the **Deactivate** link. Users with the required permissions can reactivate deactivated questions.

CREATING A NEW QUESTION

To create a new question, select **Go To → Survey Management → Admin** from the Top Navigation Bar. Click the **Manage Questions** link. Click the **Create a New Question** button. Enter a short name for the question. This is only for internal use within the system. Enter a long name for the question. You should enter the text as you want it to appear in the survey. Click the **Create** button to save your changes.

WORKING WITH RATING GROUPS

Rating groups are the rating scales that are used by the recipient of the survey to respond to the questions and statements that make up the survey. EnterpriseTrack allows you to create multiple rating groups that can be used within the same survey. You can create multi-point Likert scale like rating groups, or you can create simple Yes/No rating groups. Each item in the group should have a rating point associated with it to allow the system to weigh the response appropriately. You can use the order number to define the order in which the rating item should appear on the survey.

On the **Rating Groups** page you can you can edit, delete and deactivate individual rating groups. Deactivated rating groups will not be available for use in survey templates.

EDITING A RATING GROUP

Click the **Edit** link in the **Actions** column of the rating group you wish to edit. Make the required changes on the Edit rating **Group** page. Use the **Delete** button on each row to delete that particular rating item. Use the **Add** Item button to add new items to the list. Click the **Save** button to save your changes.

DELETING AND DEACTIVATING A RATING GROUP

To delete the group that you created click the **Delete** link in the **Actions** column of the rating group.

You can also retain the group, but not have it be active and available by clicking the **Deactivate** link. Users with the required permissions can reactivate deactivated groups.

CREATING A NEW RATING GROUP

Click the **Manage Rating Groups** link. Click the **Create a New Rating Group button**. Enter a name for the group and enter the individual items. Enter a label for each item and the rating point assigned to it. Both the label and the points will be displayed in the survey. Set the sort order for each item. Click **Save** to create the group

MANAGING TEMPLATES

Survey templates define the questions and the rating groups that make up the individual surveys. Templates can have multiple sections, each with its own group of questions and rating group. The individual questions and rating groups must already be created before you can use them in your survey template.

On the **Survey Templates** page you can edit, delete, deactivate and preview the templates.

EDITING A TEMPLATE

Click the **Edit** link in the **Actions** column of the template you wish to edit. On the **Edit Survey Template** page you can modify the questions in each section by using the **Available questions** menu. You can modify the order in which the questions are displayed in each section by clicking on the question (in the **Selected Questions** menu control) and then clicking the **Move up** or **Move down** button as needed. Modify the rating group for each section by selecting the one you want from the **Rating** group pull-down menu. Add a new section by clicking the **Add Section** button at the bottom of the page. Each section must have at least one question and a rating group.

DELETING AND DEACTIVATING A TEMPLATE

To delete the template click the **Delete** link in the **Actions** column of the template you wish to delete. You can also retain the template but not have it be active and available by clicking the **Deactivate** link. Users with the required permissions can reactivate deactivated surveys.

Click the **Preview** link to view what the survey will look like to recipients.

CREATING A NEW SURVEY TEMPLATE

Before you create a new survey template, make sure you have created the questions and the rating groups. Once you have created these, you can create the survey template. To begin creating a survey, select **Go To** → **Survey Management** → **Admin** from the Top Navigation Bar. Click the Manage templates link. Click the **Create a New Survey Templates** button. Enter the template name and add headers and descriptions. Click the **Add Section** button. Enter a section name. Select the questions from the **Available Questions** menu and select the rating group for the section.

Continue to add sections and click the **Create Survey Template** to save your changes.