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EnterpriseTrack

Administrator's Guide
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Contents

System Administration Overview

The Administration module in EnterpriseTrack allows you to manage your deployment by changing various aspects of the application. Access to the administration and configuration UI is controlled through permissions. The Administration link is displayed only if you have permissions to access at least one administration section. You can use following tabs on the System Administration module to set and manage EnterpriseTrack:

- **Application Configuration**: From this tab you can access links to configure the following: projects, project settings, organizational hierarchy, status reports, calendars, routing, custom fields, classification fields, resource pulldown, alignment pulldown, global pulldown, and initiative pulldown.
- **Resource and Security Admin**: From this tab you can access links to resource administration, resource configuration, resource admin reports, timesheet settings, security administration, and configuring temporary administrators.
- **Finance Management**: From this tab you access all finance management links.
- **General Settings:** From this tab you can access links to configure you company settings, help settings, notifications/emails, storyboard, mobile, and report, listing page, and search settings.
- **Data Import and Export:** From this tab you can access links to data import, data export, and download integration templates
- **Background Jobs:** From this tab you can view the submission status of all rate change requests.
- **Updates:** From this tab you can view the updates that were made to the system. You can view a list of release upgrades, hot patches, and service packs that were applied. It also displays the mode changes, customizations, and the new initiatives that were added. This is a ready-only tab.

Getting Around in the Administration Module

Access

To Access the Administration module, click on the **Administration** link in the Left navigation bar or select **Go To > Administration** from the Top Navigation Bar to access the Administration User Interface (UI).

Navigation

Using 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.
- The **My EnterpriseTrack** (terminology is configurable) menu displays options that take you to your specific actions and settings. It shows your work (all open actions on Projects, Proposals, Ideas etc. that are assigned to you), your messages, certifications, permission, profile, 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.
- The project type ahead text box provides easy navigation to any project in the system. 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 launch UPK.
- Click on the **Logout** button at any time to log out.

Using 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. The Left Navigation bar provides access to all modules in the EnterpriseTrack system. 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.

Use the  icon on top of the Left Navigation bar to expand and collapse the Left Navigation bar. To return to the main **Administration** menu from any of the above sections, click the **Administration** link in the Left Navigation bar.

Important!

Do not use the browser's **Back** and **Forward** buttons to navigate to a different page. Use the left navigation bar and/or the buttons provided within Enterprise Track. When you first log into the system, the left and top navigation bars will be active. Once you enter a specific page within a module, you will find that all the navigation buttons are disabled.

Note: You may have to click the Save, Done or Cancel buttons in the active page to enable the Left Navigation bar.

Sorting

There are several pages within the Administration module where lists of items are displayed. The lists within EnterpriseTrack can be sorted by clicking the column title.

Resource and Security Admin

In This Section

Resource Administration

In This Section

Creating Application Administrators

Application Administrators perform various administrative functions to ensure that the system runs smoothly. They set up and manage the application, and assign access rights or permissions for resources to access the system.

Application Administrators are associated with initiatives and have access to all projects within their initiative, including confidential project. They can also access all modules within EnterpriseTrack.

> **Note**: You cannot assign System Administrators to any projects.

To create a system administrator:

1) Click the **Resource & Security Admin** tab.
2) Select the **Application Administrators** link. The *Application Administrator List* page is displayed.
3) Click the **Add Application Administrator** button.
4) Enter a Login ID.

5) Enter the first name, last name and email address.

> **Note:** Passwords in the EnterpriseTrack system have to be a minimum of 8 characters and must contain both alpha and numeric values and at least one special character like *, $, or an underscore.

6) Select a status. Specify when the selected status should become effective.
7) Select the type of labor rate.
8) If your system is configured with multiple initiatives, select all initiatives that this System Administrator is associated with from the **Associated Initiatives** field.
9) Enter any additional information under the Resource Details, Contact Info, Organizations, Preferences, and the Additional Resource Details sections.
10) Click **Add Application Administrator**.

Unlocking a Resource

You can use the *Resource Locks* page to view and unlock all resources who are currently locked out.

To unlock a resource:

1) Click the **Resource & Security Admin** tab.
2) Select **Login Locks**.
3) In the **Action** column for the appropriate resource, click **Unlock**.

Assigning Permissions to System Access Profiles and Roles

Resources within EnterpriseTrack are assigned permissions based on their resource access profiles and the roles that they are allowed to perform. Before assigning permissions, it is important to understand how resource access profiles and roles are defined within the system.

System Access Profiles

Each resource in the EnterpriseTrack system must be assigned a system access profile. The system access profile determines a resource's global permissions. A resource can have only one system access profile.

Roles

Each resource in the EnterpriseTrack system can be assigned multiple roles. The roles determine the project specific permissions for any given resource in the system. Only resources that have at least one role assigned to them are available as potential team members of projects.

Editing Permissions

To begin managing permissions based on system access profiles and roles:

1) Click the **Resource & Security Admin** tab.
2) Click the **Edit Permissions** link.

3) In an installation with multiple initiatives on one system, you must first select the initiative that you want to modify.
4) Select the module you wish to modify.
5) Click the **Edit Permissions** button.
6) You will see a break-down of the various actions that can be performed within the selected module and a grid displaying the various system access profiles and roles that are available in the system. Use the check boxes to modify the permissions.

	Project Manager	Champion	Master Black Belt
Ideas			
Modify Idea	☐	☐	☑
View Confidential Submitter Details	☐	☐	☑
Accept/Reject Idea	☐	☐	☑
Delete Idea	☐	☐	☑

7) Click **Save**.

Notes:

- When an action cannot be performed based upon a system access profile or role, the system will not display a check box. An **n/a** sign will be displayed instead.
- All actions with the Knowledge Base have to be based on system access profiles, not roles, so there will be no check boxes in the Roles section of the page.

In This Section

Editing Administration Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Administration module. The list below describes the permissions you can select.

- **Configure Application**

Access the Administration module to configure EnterpriseTrack. This permission is typically given to System Administrators.

- **Manage Messages**

  Manage the Messages module. From the Messages module users can send system-wide messages or send messages to a select group of users.

- **Create/Modify Resources**

  Add, edit and delete resources. The Manage Resources link is enabled and displayed only if users have this permission.

- **Manage Languages**

  Modify the language catalog.

- **Manage Survey Administration**

  Manage and administer the Survey module.

- **Manage Survey Instances**

  Create and edit surveys.

- **Save Layout For Access Profile**

  Manage and save the layout (Home Page, Project Landing page, and Project Listing Columns) for each access profile.

- **Execute APIs**

  Execute integrations APIs. Typically this permission is given only to users who are integrating EnterpriseTrack with another program.

- **Execute APIs as Proxy**

  Execute integration APIs on behalf of others.

- **Manage Reference Calendars**

  Create, edit, and delete Reference Calendars.

- **Manage Labor Expense Type Mapping**

  Manage the Labor Expense Types. The Manage Labor Expense Types link is displayed only if users have this permission.

- **Modify Evaluation Weights**

  Configure evaluation weights for proposals and ideas.

Editing Dashboard Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Dashboard module. Click to select the dashboard components you want a particular role or access profile to be able to access. Only the dashboard components you select here are editable through the Dashboard module.

Editing Finance Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Finance module. The list below describes the permissions you can select.

- **Manage Global Financial Settings**

  Modify all the setting under the Finance Management section. This permission is typically given to System Administrators.
- **Manage all Finance Templates and Finance Approval Templates**

  Modify all finance templates and finance approval templates. The Manage Finance Template and the Mange Finance Approval Template are displayed only if this permission is enabled.
- **Manage Finance Templates and Finance Approval Templates for resource Initiative**

  Manage finance templates and finance approval templates for resource initiative.
- **Update Inputs for Finance Fields (NPV, IRR etc.)**

  Update the finance fields within a project. This permission is typically given to a role, for example Project Finance Administrator.
- **Update Project Lock Month**

  Update the lock month associated with a project. This permission is typically given to a role, for example Project Finance Administrator.
- **Update the Use Global Lock Month**

  Update the global lock month associated with a project. This permission is typically given to a role, for example Project Finance Administrator.
- **Project Finance Administrator**

  Allow a particular role to be the designated project Finance Administrator.
- **Update Finance Tracking Start Date**

  Update the finance tracking start date associated with a project.
- **Update Start Date for # Preferred Finance Sub-Window#**

  Update the start date of the preferred finance sub-window.
- **Update Project's Finance and Approval Templates**

  Update the project finance template and the project finance approval template.
- **Update Finance Data outside #Preferred Finance Sub-Window#**

  Update the project finance data outside the preferred finance sub-window.
- **Update Finance Snapshot Data**

  Update the project finance snapshot data.
- **Update Finance Data**

  Update the project finance data.
- **Update Project Currency**

  Update the project currency.
- **Manage Currencies and Conversion Rates**

  Manage the currencies and conversion rates. The Manage Currencies and Manage Conversion Rates links are displayed in the Administration module when this permission is enabled.
- **Manage Group Finance Validation**

  Validate finances across all projects. The Finance Validation button is displayed on the Project Listing page only if the permission is enabled.
- **Manage Project Finance Setting Excel Import/Export**

Manage the import/export of project finance setting using Microsoft Excel.

Editing Ideas Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Ideas module. The list below describes the permissions you can select.

- **Modify Idea**
  Modify ideas.
- **View Confidential Submitter Details**
  View confidential submitter details.
- **Accept/Reject Idea**
  Accept or reject ideas.
- **Delete Idea**
  Delete ideas.
- **Route Idea**
  Route an idea for approval.
- **Own Idea**
  Own ideas.

Editing Project Permissions

You can use the **Manage Permissions** page to edit role-based and access profile-based permissions related to the Projects. The list below describes the permissions you can select.

- **Create Confidential Documents**
  Create confidential documents.
- **Create Quick Projects**
  Create projects without starting from a proposal.
- **Modify Project Basics**
  Modify project basics.
- **Modify Project Manager**
  Modify the Project Manager associate with a Project.
- **Modify Confidentiality**
  Modify project confidentiality settings.
- **Modify Dates**
  Modify project dates.
- **Modify Other Resource Tollgate**
  Modify tollgates associated with other resources.
- **Modify Baseline Dates and Efforts Activities**

Modify an activity's baseline date and efforts.

- **Create Documents**
  Create project documents.
- **Modify Documents**
  Modify project documents.
- **Send Email to Project Members**
  Email project team members.
- **Create Issues**
  Create project issues.
- **Modify Issues**
  Modify project issues.
- **Create Metrics**
  Create project metrics.
- **Modify Metrics**
  Modify project metrics.
- **Create Notes**
  Create project notes.
- **Create Confidential Notes**
  Create confidential notes.
- **Create Team Members**
  Add project team members.
- **Modify Team Members**
  Modify project team members.
- **Set Project On-Hold/Off-Hold**
  Set a project on-hold or off-hold.
- **Close Projects**
  Close projects.
- **Complete Projects**
  Mark projects as complete.
- **Reopen Projects**
  Reopen closed projects.
- **Request Approval for an Activity**
  Request approval for an activity.
- **Approve Activity for Others**
  Approve activity for others.
- **Create/Modify/Delete Activity at Top-Level for Roadmap**
  Create, modify and delete top-level activities for roadmaps.
- **Create/Modify/Delete Activity Other Level for Roadmap**
  Create, modify and delete activities for roadmaps.

- **Create/Modify/Delete Activity at the Top-Level for Non Roadmap**
  Create, modify and delete top-level activities for non-WBS roadmaps.
- **Create/Modify/Delete Activity at Other Level for Non Roadmap**
  Create, modify and delete activities for non-WBS roadmaps.
- **Reopen Top Level Activity**
  Reopen a top level activity.
- **Advance Top Level Activity**
  Advance top level activity.
- **Copy Projects**
  Close projects.
- **Delete Projects**
  Delete projects.
- **Change Roadmap**
  Change a project's roadmap.
- **Cancel/Reactivate Project**
  Cancel or reactivate projects.
- **Export Microsoft Project Plan**
  Export a Microsoft Project Plan.
- **Release Lock or Import MSP by Others**
  Release lock and import from MS Project.
- **Manage Computation Mode**
  Manage the computational Mode.
- **View Team Member Rate**
  View team member rate.
- **Modify Team Member Rate**
  Modify team member rate.
- **Override Team Member Rate**
  Override a team member's rate.
- **Manage Labor Expense Type**
  Manage Labor Expense Types.
- **Create Risks**
  Create project risks.
- **Modify Risks**
  Modify project risks.

Edit Programs Permissions

You can use the **Manage Permissions** page to edit role-based and access profile-based permissions related to programs. The list below describes the permissions you can select.

- **Create/Modify Program**

Create and modify programs.

- **Delete Program**

  Delete programs.

Editing Navigation Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Navigation module. You can enable the following modules:

- My Work
- My Preferences
- Ideas, Programs
- Knowledge Base
- Resources
- Timesheets
- Reports
- Proposals
- Surveys
- My Messages

Within each project, you can also set permissions to view the following: project dates, project documents, project finances, project import/export, project issues, project metrics, project notes, project reports, project settings, project status report, project team, linked project, WBS work items, and non-WBS work items.

Edit Reports Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Reports module. Click to select the reports you want a particular role or access profile to be able to access. Only the reports you select here editable through the Reports module.

Edit Status Report Permissions

You can use the **Manage Permissions** page to edit role-based and access profile-based permissions related to status reports. The list below describes the permissions you can select.

- **Create/Edit Status Reports**

  Create and edit status reports.
- **Approve/Reject Status Report**

  Approve or reject status reports that were submitted.
- **Edit Approved Status Reports**

  Make changes to approved status reports.
- **Delete Status Report**

  Delete status reports.

Editing Resource Permissions

You can use the **Manage Permissions** page to edit role-based and access profile-based permissions related to resources. The list below describes the permissions you can select.

- **View Resource Assignments**
  View all resource assignments.
- **View Resource Utilization Chart**
  View the resource utilization chart for all resources.
- **Create and Edit Timesheet**
  Create and edit timesheets.
- **Enter Non-Project Time**
  Enter non-project time in timesheets.
- **Enter Non-Working Time**
  Enter non-working time in timesheets.
- **Enter Project Level Time**
  Enter project level time in timesheets.
- **Enter Activity Level Time**
  Enter time at the activity level in timesheets.
- **Delete Timesheet**
  Delete their own timesheets if the timesheet status is Open, Submitted, or Rejected during the Timesheet Open Period.
- **View Other Resource Timesheets**
  View all resource timesheets.
- **Re-open Approved Timesheet**
  Edit all approved timesheets.
- **Delete Other Resource Timesheet**
  Delete timesheets submitted by other resources, if the timesheet status is Open, Submitted, or Rejected during the Timesheet Open Period.
- **Allow Resource Manager to Approve (or Reject) Project Line Items**
  Allow the Resource Manager of the timesheet submitter to also approve/reject project line items.
- **Manage Timesheet Periods**
  Set a timesheet close period, reopen timesheets for correction, and run timesheet status reports.
- **Approve Resource Requests for all Roles**
  Approve project resource requests for all roles.
- **Approve Resource Requests for Allowed Roles**
  Approve resource requests for allowed roles.
- **Approve Resource Requests for other Approvers**
  Approve resource requests for approvers.

- **View Resource Utilization Tab**, **View Resource-Gantt Tab**, **View Resource-Heatmap Tab**, **View Resource-Assignments Tab**, **View Resource-Rate Tab**, **View Resource-Expertise Tab**, **View Resource-Certifications Tab**

  View the Resource Utilization, Resource-Gantt, Resource-Heatmap, Resource-Assignments, Resource-Rate, Resource Expertise, and the Resource-Certification tabs on the Resource Listing page.
- **Allow user to view/Search login ID**

  View and search login IDs.
- **View All Resource Calendars**

  View all resource calendars.
- **Edit All Resource Calendars**

  Edit all resource calendars.
- **Edit My Resource Calendar**

  Edit only their calendar.

Resource Configuration

In This Section

Managing Resources

A resource is any person or equipment that you can track and assign to project activities. Resources perform roles within projects. Each resource is associated with an Access Profile and at least one role.

From the **Resources** link, you can add, edit, and delete resources. You can also manage their profile, area of expertise, certification, assets, calendar, rate, and password.

In This Section

Adding Resources

You can use the **Add New Resource** page to add resources to your system. You must have the appropriate permissions to add resources. Once you have created a new resource, you can use the **Edit** option to update a resource profile to include certifications and assets.

Note: You must complete all mandatory fields highlighted in red.

To create a new resource:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Select **Create > Resource**. The *Add New Resource* screen is displayed.

Entering Resource Details and Contact Information

1) Choose the type of resource: **Equipment** or **Person**. The information fields change depending on the resource type you selected.
2) If you selected resource type **Person**, enter a Login ID, First Name, and Last Name. If you selected resource type **Equipment**, enter a Login ID, the Make, Resource Name, Owner First Name and Owner Last Name.
3) Select an Access Profile. All resources in the system must have an Access Profile.
4) Select a status. The default status is **Active**. You can assign resources with the status **Active** to projects. A resource with status **Inactive** cannot access the EnterpriseTrack system, but can still be assigned to projects. A resource with the status **Disabled** cannot access the EnterpriseTrack system and cannot be assigned to projects.
5) Specify when this resource status should become effective.
6) Enter the user authentication mode. This field displays only if the default user authentication mode was set to LDAP or SSO.
7) Enter a password. This field appears only if the user authentication mode is set to User Password.

   Note: A password must be at least 8 characters long and contain at least one character that is not alphanumeric, an underscore or white-space. E.g. *, %, $ etc.

8) Enter an Email address.

Selecting an Organization

1) Select a division. The other fields are populated based on the value you select here.
2) Enter a business unit and business subunit.

Selecting Initiatives and Roles

1) From the Associated Initiatives selection box, select all initiatives associated with this resource.
2) Select the roles this resource can perform within each initiative. You can select multiple roles for a user. In single initiative systems, you must select at least one role.

Selecting Area of Expertise, Calendar and Labor Rate

1) From the list of Available Areas box, select the areas of expertise.
   a. To add an area of expertise to the list, click the **Add** link next the *Selected Areas* label.
   b. Enter a name and click **OK**.
2) Select a calendar. The default calendar is the Standard Calendar.

> **Note:** You must associate a resource with a calendar. The resource calendar is used to calculate resource utilizations.

3) Select the type of labor rate. If you select **Use Role Rate**, then the labor rate for this resource is based on the rate associated with their role. If you select **Use Resource Rate**, enter the standard, overtime, or setup labor rates.

Selecting Preferences and Resource Custom Fields

1) Enter any additional information under the *Preferences*, *Resource Custom Fields* and the *Additional Resource Detail* sections.
2) Click **Add Resource**.

Editing Resources

You can edit a resource profile to:

- Update personal information.
- Manage certifications and assets.
- Update area of expertise.
- Change passwords. The Change Password button is displayed only if the authentication mode is User Password.

To edit a resource profile:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource profile you want to edit and select **Actions** > **Edit**. You can choose to edit the Details, Area of Expertise, Certification, Assets, Calendar, and Rates.
3) From the Edit Resource page, make all the necessary changes.

4) Click **Update**.

Managing Certifications

From the *Resource List* page, you can view, add, edit, and delete certifications associated with a resource profile. Adding certification information to a resource's profile is one way to ensure that a resource's skills are appropriately matched with a project's requirements.

Viewing Certifications

To view certifications:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, choose **Select**.
4) Click the **Certifications** tab.

Adding Certifications

To add certifications:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Certifications.**
4) Click the **Add Cert** button. The *Add New Certifications* page is displayed.
5) Enter all the relevant information.
6) Click **Add Cert**.

Editing Certifications

To edit the details of an existing certificate:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Certifications**.
4) Click the **Certification ID** link to select the certification you want to edit. The *Edit Certification Info* page is displayed.
5) Make the necessary changes and click **Update**.

Deleting Certifications

To delete an existing certification:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Certifications**.
4) Click the **Certification ID** link to select the certification.
5) Click **Delete**.
6) Click **OK** to confirm the deletion.

Managing Assets

You can use the *Resource Listing* page to view, add, edit, or delete assets associated with a resource. An asset may include items like laptop, pager, cell phone etc.

Viewing Assets

To view assets associated with a resource:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, choose **Select**.
4) Click the **Assets** tab.

Adding Assets

To add assets:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Assets.**
4) Click the **Add Asset** button. The *Add New Asset* page is displayed.
5) Enter a serial number for the asset.
6) Select the type of asset.
7) Enter a description for this asset.
8) Click **Add Asset**.

Editing Assets

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Assets**.
4) Click on the **Asset ID** link to select the asset you want to edit. The *Edit Asset Info* page is displayed.
5) Make the necessary changes and click **Update**.

Deleting Assets

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Assets**.
4) Click on the **Asset ID** link to select the asset you want to delete. The *Edit Asset Info* page is displayed.
5) Click **Delete** to remove the asset.
6) Select **OK** to confirm the deletion.

Changing Passwords

To change a resource password:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Details.** The *Edit Resource Info* page is displayed.
4) Click the **Change Password** button.
5) Enter a new password.
6) Enter the same password in the Confirm Password field.
7) Click **Change**.

> **Note:** A password must be at least 8 characters long and contain at least one character that is not alphanumeric, an underscore or white-space. E.g. *, %, $ etc.

Deleting Resources

To delete a resource:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource profile you want to delete. You can use the **Quick Filter** to help you find a resource.
3) From the **Actions** column, select **Delete**.
4) Click **OK** to confirm the deletion.

> **Notes:**
>
> - The system may require you to delete a resource's assets and certifications before deleting a resource.
> - You cannot delete a resource that is currently assigned to a project. You have to reassign the project to another resource.

Using the Quick Filter

EnterpriseTrack allows you to filter your resource list in multiple ways. You can search for a specific name, view all last names beginning with a particular letter or filter by other criteria using the sophisticated filtering engine.

Searching for a Resource

To search for a specific name, enter the appropriate letter in the Last Name Starts with field and click the **Go** icon. You will see a list of resources matching the search criteria you entered.

Modifying Advanced Search

To modify the advanced search setting:

1) Click the **Advanced Search** link.
2) On the Advanced Search page, enter the appropriate values, check the appropriate boxes or choose from the pull-down menus.
3) You can view the current search criteria by clicking the **Show Current Search Criteria** field.
4) Enter your selection criteria in the relevant fields. In most systems, you will be able to filter by Initiative, title, location or work address and organizational unit.
5) Click the **Search** button to apply the search and return to the list of projects.

Note: When you choose to include the documents field in the keyword definition, the system will search through the text of the uploaded project documents.

Managing Saved Search Criteria

To save a new search:

1) From the **Manage** pull-down menu select **Create**.
2) Enter a new name in the Filter name field and enter a description. You can also choose to make this the default search.
3) Specify the appropriate values, check the appropriate boxes or choose from the pull-down menus.
4) Click the **Save Search** button.

To edit an existing search:

1) From the **Saved Search: View** menu select the search you want to edit.
2) From the **Manage** pull-down menu select **Edit**.
3) Select the search you want to modify from the **Load a Saved Search** pull-down menu.
4) Make the required changes in the various fields used to specify the search criteria.
5) Click the **Save Search** button.

To delete an existing search:

1) From the **Saved Search: View** menu select the search you want to delete.
2) From the **Manage** pull-down menu select **Edit**.

3) Click the **Delete Search** button.

> **Note:** Only user-defined searches can be deleted.

To reset filters to default values:

From the *Advanced search* page, click the **Reset Filter** button.

Managing Resource System Access Profiles

Resource access profiles allow you to define global (non-project specific) permissions within the system. All resources assigned to a resource system access profile have all the global permissions associated with their selected access profile. You can use the *Manage Resource Access Profile* page to create and manage all access profiles defined in your system. You can also define the default project listing columns, and the project landing page that will display for each resource access profile. All resources in the system must have an access profile and each resource can have only one access profile.

In This Section

Creating Resource System Access Profiles

To create a resource system access profile:

1) Select the **Resource & Security Admin** tab.
2) Select the **Resource System Access Profile** link. The *Resource Access Profiles List* page displays.
3) Click **Create a New Resource Access Profile**.
4) Enter a name for this access profile.
5) Choose a homepage for this profile. All resources with this system access profile will be taken to this page when they log in.
6) Specify a project landing page. When a resource accesses a particular project, they will be taken to the page specified here.
7) Click **Add Access Profile**.

Editing Resource System Access Profiles

To edit a resource access profile:

1) Click the **Resource & Security Admin** tab.
2) Select the **Resource System Access Profiles** link. The *Resource Access Profiles List* page displays all existing access profiles.
3) Click on the name of the resource profile you want to edit.
4) Modify the name of this profile.
5) Click **Update**.

Configure Default Project Listing Columns

You can use the *Resource Access Profiles List* page to customize columns on the Project Listing page.

To configure default project listing columns:

1) Click the **Resource & Security Admin** tab.
2) Select the **Resource System Access Profiles** link. The *Resource Access Profiles List* page displays a list of all existing system access profiles.
3) Click the **Configure Default Project Listing Columns** button.
4) Use the **>** and **<** buttons to add and remove columns. Use the **Up** and **Down** buttons to move the selected columns to the left or right. The topmost column is displayed on the farthest left of the screen.
5) Click **Update**.

Specifying Home Page by System Access Profile

To specify the home page by resource access profile:

1) Click the **Resource & Security Admin** tab.
2) Click the **Resource System Access Profiles** link. The *Resource Access Profiles List* page displays all existing system access profiles.
3) Select an access profile by clicking on its name.
4) Select a home page from the pull-down menu. All resources with this access profile will be taken to this page when they log in.
5) Specify a project landing page. When a resource accesses a particular project, they will be taken to the page specified here.
6) Click **Update**.

> **Note:** For more information on removing certain menu items from the Left Navigation bar for users with specific access profiles and for specific roles, see topic ***Assigning Permissions to System Access Profiles and Roles*** (on page 12).

Managing Resource Roles

Roles represent job titles or skills needed to execute project tasks. Manager, Finance Representative, Engineer, Architect, IT Manager, Network Administrator are all examples of possible roles. You will see a standard set of roles that are applicable to your organization already defined for you. You can create as many roles as you need. You can also assign resource to one or more roles. Roles also determine the project specific permissions for each resource in the system. Only resources with at least one role assigned to them are available as potential team members of projects.

You can use the **Resource Roles** link, to add, edit, or delete resource roles. You can also edit labor rates associated with a role and view the rate change history.

In This Section

Creating Resource Roles

To create a resource role:

1) Click the **Resource & Security Admin** tab.
2) Select the **Resource Roles** link. The *Team Composition Settings* page displays all the existing resource roles.
3) Click the **Add a New Role** button.
4) Select an initiative for this role
5) Enter a name for this role.
6) Enter the Sort Order ID. This defines the order in which it displays on listing pages.
7) Enter the standard labor, overtime labor, and setup labor rates associated with this role.
8) Enter the number of hours per week this role will spend of different project categories. For example: Project Management, Team Meetings, etc.
9) Click **Create**.

Editing Resource Roles

To edit a resource role:

1) Click the **Resource & Security Admin** tab.
2) Select the **Resource Roles** link. The *Team Composition Settings* page displays all the existing resource roles.
3) Click **[Edit]** next to the name of the resource role you want to edit. The *Edit Role* page displays.

4) Edit the resource role.
5) Click **Update**.

Editing Labor Rates for Roles

To edit labor rates for all resources associated with a role:

1) Click the **Resource & Security Admin** tab.
2) Select the **Resource Roles** link. The *Team Composition Settings* page displays all the existing resource roles.
3) Select a role and click the **[Edit Rate]** link next it.
4) Edit the current Standard, Overtime, and Setup rates, or click **[Add Row]** to add a new row to the rate table.
5) Click the **Calendar** icon and select the effective start date.
6) Click **Update**.

Viewing Rate Change History

To view all the labor rate changes associated with a role:

1) Click the **Resource & Security Admin** tab.
2) Click **Resource Roles**. The *Team Composition Settings* page is displayed.
3) Select a role and click the **[Edit Rate]** link next it.
4) Click the **[View rate change history]** link.

Managing Resource Status

Use the *Resource Status* screen to create and manage multiple resource statuses. For example, you can create a status called *Inactive Transferred*, for resources that no longer work for your organization, or *Resource Active* for resources that are currently employed.

> **Note:** Once you create a status, you cannot delete it. You can only change the status to Inactive, or Archived.

To add a new resource status:

1) Click the **Resource & Security Admin** tab.
2) Click the **Resource Status** link. The *Resource Status List* screen is displayed.
3) Click the **Create a New Resource Status** button.
4) Enter a name for this status.
5) Click **Create**.

To manage resource statuses:

1) Click the **Resource & Security Admin** tab.
2) Click the **Resource Status** link. The *Resource Status List* screen is displayed.

3) Select a resource status from the list.
4) Change the status to **Valid**, **Invalid**, or **Archived**.
5) Click **Update**.

Managing Resource Rate Default Rule

You can specify the default resource or role rate that the system displays when creating new resources or roles.

To set the resource or role rate default rule:

1) Click the **Resource & Security Admin** tab.
2) Click the **Resource or Role Rate Default Rule** link.
3) Select **Resource labor rate** or **Role labor rate**.
4) Click **Update**.

Setting TBD Capacity in Resource Modules

Use the **Include TBD Capacity in Resource Modules** link to select if you want to include or exclude TBD (To Be Decided) resource when calculating role capacity. If set to **Yes**, then TBD capacity is included when calculating capacity. If set to **NO**, then TBD capacity is not included when calculating capacity, only the demand is included.

To set TBD capacity:

1) Select the **Resource & Security Admin** tab.
2) Click the **Include TBD Capacity in Resource Modules** link.
3) From the **Value** pull-down menu, choose **Yes** or **No**.
4) Click **Update**.

Setting Default Percentage Utilization

Use the **Set Default Percentage Utilization** link to select the default resource/role percentage utilization for each initiative configured in your system. The default value you set here is used to pre-fill the percentage utilization for all resource or role allocations.

To set the default percentage utilization:

1) Select the **Resource and Security Admin** tab.
2) Click the **Default Percentage Utilization** link.
3) Enter a value for each initiative configured in your system.
4) Click **Update**.

Resource Admin Reports

In This Section

Usage Statistics Report

Use the *Usage Statistics Report* to view account usage. This report displays the following information:

- The number of initiatives loaded.
- A count of resources that accessed the system in the past 7 to 180 days.
- A count of projects updated in the past 7 to 180 days by initiative.
- The number of Ideas created.
- A count of proposals by initiative and status.
- Project Information
  - A count of projects by initiative.
  - A count of projects by initiative and status.
  - A count of project components
- Resource Information
  - The total number of active resources across all projects, realization projects, and completed projects.
  - The number of Project Managers with active projects grouped by initiative and access profile.
  - The number of Project Managers with active projects.
  - The number of resources with Project Leader/Project Manager role by initiative and access profile.
  - The number of active resources by initiative and access profile.
  - The number of active resources by initiative.
  - The total number of resources by initiative.
- System Information
  - A count of system components

To view the Usage Statistics Report:

1) Click the **Resource & Security Admin** tab.
2) Select the **Usage Statistics Report** link.

Permissions Report

Use the *Permissions Report* to view all resource access profiles and roles with their permissions.

To view the Permissions Report:

1) Click the **Resource & Security Admin** tab.
2) Select the **Permissions Report** link.

Last Login Report

Use the *Last Login Report* to view a log of all users who attempted to log into the system, login date, user ID, login ID, email address, first name, last name and the success of the login.

To view the Last Login Report:

1) Click the **Resource & Security Admin** tab.
2) Select the **Last Login Report** link.

Setting Resource Heat Map Thresholds

Use the **Set Resource Heat Map Thresholds** link to edit the thresholds that control the colors in heat maps, including the Resource Planning List page, What-if View Scenario page, and all heat map reports.

To set the heat map thresholds:

1) Select the **Resource & Security Admin** tab.
2) Click the **Resource Heat Map Thresholds** link.
3) Edit the default Upper Threshold % column value for the Green, Amber and Red rows. The Lower Threshold % column value is automatically set based on the Upper Threshold %.
4) Click **Update**.

Timesheet Settings

In This Section

Configuring Time Reporting Categories

In This Section

Configuring Categories for Project Related Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

1) Click the **Resource & Security Admin** tab.
2) Click the **Project Time Reporting Categories** link. All the available categories are listed, by initiative.
3) To modify an existing category, click the name of the category.
4) To create a new category, click the **Create** button.
5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.
6) Enter a category name and an order ID.
7) Click **Update** or **Create** as appropriate to save your changes.

> **Note:** Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Configuring Categories for Non-Project Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

To create and manage non-project related time reporting categories:

1) Click the **Resource & Security Admin** tab.
2) Click the **Non-Project Time Reporting Categories** link. All the available categories are listed, by initiative.
3) To modify an existing category, click the name of the category.
4) To create a new category, click the **Create** button.
5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.
6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note:** Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Configuring Categories for Non-Working Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

To create and manage non-project related time reporting categories:

1) Click the **Resource & Security Admin** tab.
2) Click the **Non-Working Time Reporting Categories** link. All the available categories are listed, by initiative.
3) To modify an existing category, click the name of the category.
4) To create a new category, click the **Create** button.
5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.
6) Enter a category name and an order ID.
7) Click **Update** or **Create** as appropriate to save your changes.

> **Note**: Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Managing Estimated Time to Complete for Timesheet Settings

To enable the Estimated Time to Complete (ETC) field for timesheets:

1) Click the **Resource & Security Admin** tab.
2) Select the **Manage Estimated Time To Complete For Timesheet Settings** link.
3) Choose an initiative and click the **[Edit]** link next to it. The *Edit Estimated Time to Complete for Timesheet Settings* screen is displayed.
4) Choose if you want to enable the ETC field for timesheets.
5) Choose if you require resources to enter their ETC for activities before submitting their timesheets.
6) Click **Update**.

Manage Allowed Grace Period in Days for Activities in Timesheet

To change the grace period for timesheet reporting:

1) Click the **Resource & Security Admin** tab.

2) Select the **Manage Allowed Grace Period In Days For Activities in Timesheet Settings** link.
3) Choose an initiative and click the **[Edit]** link next to it. The *Edit Allowed Grace Period In Days For Activities In Timesheet Settings* screen is displayed.
4) Specify how many days past the activity completion date can team members continue to report effort.
5) Specify how many days before the activity start date can team members start reporting effort.
6) Click **Update**.

Security Administration

In This Section

Managing Resource Password Hint Questions

You can use the *Manage Resource Password Hint Questions* page to create and manage hint questions. The questions are emailed to a resource when they forget their password.

To manage password hint questions:

1) Click the **Resource & Security Admin** tab.
2) Select the **Manage resource password hint questions** link.
3) Click the **Create Question** button.
4) Enter a question.
5) Click **Create**.

To edit a question:

1) Click the **Resource & Security Admin** tab.
2) Select the **Manage resource password hint questions** link.
3) From the **Actions** column, click **Edit**.
4) Make the required changes on the *Edit Question* page and click **Update**.

To delete a question:

- From the **Actions** column, click the **Delete**.

Managing Portal Settings

You can use the *Portal Settings* page to create a user ID and password to access the Idea Portal. Users can use this ID and password to enter the Idea Portal without to logging into EnterpriseTrack.

1) Select the **Resource & Security Admin** tab.
2) Click the **Portal Settings** link. The *Edit Portal Settings* screen is displayed.
3) Enter a portal ID and Password.
4) Click **Update**.

Managing Login Warning Message

You can use the *Login Warning Message* page to add any warning message or terms of use you would like displayed on the Login screen.

To edit the login warning message:

1) Select the **Resource & Security Admin** tab.
2) Click the **Login Warning Message** link. The *Edit Login Warning Message* screen is displayed.
3) Enter the message.
4) Click **Update**.

Temporary Administrator Settings

To activate a temporary administrator:

1) Select the **Resource & Security Admin** tab.
2) Click the **Temporary Administrator Settings** link.
3) Select **Activate** from the **Temporary Administrator State** option.
4) Click the **Calendar** picker and select a deactivation date.
5) Enter the first name and last name of the temporary administrator.
6) Enter an email address.
7) Select when you want the temporary password to expire.
8) Click **Update**.

To deactivate a temporary administrator:

1) Select the **Resource & Security Admin** tab.
2) Click the **Temporary Administrator Settings** link.
3) Select **Deactivate** from the **Temporary Administrator State** option.

Application Configuration

In This Section

Configuring Roadmaps

A roadmap or WBS (Work-breakdown Structures) is a hierarchical arrangement of activities, tasks or milestones that are required to complete a project. A roadmap divides a project into discrete phases or top-level activities and each phase is further broken down into multiple work elements or tasks. A roadmap is associated with one or more activity templates or phases and each activity template contains one or more activities. These activities can be tasks, deliverables, milestones, or tollgates.

The process of configuring roadmap involves the following steps:

1) Creating activity subtypes. Typically, these are defined only for top-level activities or phases. Activity subtype is the name that displays in the User Interface for a phase or a top-level activity.
2) Configuring an activity template for each phase or top-level activity you have defined in your system.
3) Populating an activity template with work elements or activities. An activity template contains multiple activities like tasks, deliverables, tollgates, etc.
4) Configuring a roadmap (WBS).
5) Populating a roadmap with phases or activity templates.
6) Associating a roadmap with project types.
7) Creating resource assignment types

Once you have configured roadmaps, Project Managers can use these pre-defined roadmaps to quickly plan and execute projects.

You can also create non-WBS roadmaps, which are a set of activities that are associated with a project but are not part of the project WBS. For example, change requests, issues, notes, etc.

Note: Some of the choices you see while creating activity templates and roadmaps are determined during the initial system configuration.

In This Section

Creating Activity Sub Types

Activity sub types are the user visible names for the phases or activity templates you have defined. For example for the activity template *Phase*, you can have a sub type called *Planning*, or *Testing*.

To create activity sub types:

1) Click the **Application Configuration** tab.
2) Select the **Activity Sub Types/ Phase Name** link.
3) Click the **Create a New Activity Sub Type** button.
4) Select the activity type from the drop-down menu. For example, Phase.
5) Enter a name for this activity sub type. For example, you could create a sub type called Requirements Analysis, Planning, Designing, or Testing.
6) Enter the lower and upper cycle time range (in days). This is the upper and lower duration range for this activity sub type.
7) Click **Create**.

Working with Activity Templates

You can create activity templates for each phase of your project, and each activity template can be configured to have an ordered list of tasks and deliverables. You can specify tools, create tollgates, set approvers, and set resources.

You can set tollgates to be effort-based or duration based:

- Effort-based

  This is based on the effort required to get a job done. For example, a paint job may require 40 hours for 4 people working for 5 hours every day to complete the job.

- Duration-based

  If there is a required time for the job to be completed. For example, in the instance of the paint job above, it may take a certain amount of time for the paint job to dry up. The lead time cannot be reduced by putting more people to dry the paint.

Activity templates are used in roadmaps and any changes made to an activity template affect all roadmaps that refer to the template. Existing projects are not affected, only future projects are affected by the template changes.

In This Section

Creating Activity Templates

To create a new activity template:

1) Click the **Application Configuration** tab.
2) Select the **Activity Templates** link.
3) Click the **Create a New Activity Template** button. The *Create Activity Template* page is displayed.
4) In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the Initiative pull-down menu.
5) Based on the initiative, the Roadmap family pull-down will be populated. Choose the appropriate roadmap family for your new activity template.
6) Select the activity type for which this template is being created.
7) Select the Activity Sub Type for this activity template.
8) Enter a name for the activity template. This name will be used within the system and will not be visible to any user other than the System Administrator.
9) From the drop-down list select if this activity template will be used as a **template** or as **creation_defaults**. You can choose to use this as a template for creating activities on roadmaps, or as creation_defaults. Creation_defaults are used to set default field values so new activities on the Roadmap appear as in-line rows.
10) You can also enter a description and the estimated time duration (in days) for this activity. This will be the default duration for this particular activity in every project that uses this activity template.
11) Select a default Labor Expense Type (LET) from the drop-down list.
12) From the drop-down menu select the Plan Effort Type and Actual Effort Type.
13) Select if you want to enforce resources. If you select **Yes**, then select the mandatory resources. You can also the select if all resources are required for this activity type.
14) From the *Approvers* pane, you can manage permissions for the approvers and you can also choose to enforce approvals and approvers for the activity template.
15) From the *Percentage Completion* pane, you can select how you want the percentage complete to be calculated.
16) Click **Create** to save your changes.

Editing Activity Templates

Editing an activity template consists of modifying its name, description and time duration.

To edit an existing activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link. You will see a list of all the existing activity templates.
3) Locate the template you want to edit and click the **[Edit] link in the Action** column.
4) Make the necessary changes in the *Edit Activity Template* page.
5) Click **Update** to save your changes.

Copying Activity Templates

If you want to create multiple activity templates that are only slightly different from each other, you can use the copy function. After you are done copying the new activity template, you can modify the deliverables and tasks. See topic ***Editing Activities and Tasks*** (on page 44).

To copy an existing activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link. You will see a list of all the existing activity templates.
3) Locate the template you want to copy and click the **[Copy]** link in the Action column.
4) Enter a name.
5) Click **Copy**. A complete copy of the activity template is created.

Deleting Activity Templates

To delete an existing activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link. You will see a list of all the existing activity templates.
3) Locate the template you want to delete and click the **[Delete]** link in the **Action** column.
4) Click **OK** in the pop-up dialog box to confirm the deletion.

Adding Deliverables and Tasks to Activity Templates

For an activity template to be meaningful, each activity must have its own set of deliverables, which can be broken down further into tasks. Since EnterpriseTrack allows you to create multiple activity templates for an activity, you can define deliverables and tasks for each activity template.

Adding deliverables and tasks

Once the template has been created, you can continue to add the deliverables and tasks.

To add deliverables and tasks to an activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link to view a list of all the existing activity templates.
3) Locate the template and click on its name. The *Activity Template Explorer* page is displayed.

4) Click the ⊞ icon to view the contents of the template.
5) Add peer or child activities.
   a. Click the icon to add a peer activity. You can add gates, tollgates, deliverables, phases, and tasks to the activity template.
   b. Click the icon to add a child activity. You can add gates, tollgates, deliverables, phases, and tasks to the activity template.

   Note: You cannot add peer activities to a top level activity. However, you can add child or peer level activities to a child activity.

6) Enter a name, sub type and description for this activity.
7) You can enter the number of estimated hours for this activity and this will be carried forward when the roadmap is used for a project. Projects Managers can check the available hours for each user and make sure it is in line with the estimated hours for an activity before assigning the deliverable.
8) Set the initial status, select which roles will be allowed to own this activity, and whether ownership should be enforced or not.
9) You can also choose tools that are associated with this activity. The system allows you to enter the names of tools that have not yet been uploaded into the Knowledge Base under **Tool Templates**. Click the **Add** link next to the **All Available Tools** field and enter a name in the pop-up dialog box.

   Note: You must upload this tool in the Knowledge Base.

10) Click the **Save** button to save your changes.

Adding Dependencies between Activities

To add dependencies between activities:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link to view a list of all the existing activity templates.
3) Locate the template and click on its name. The *Activity Template Explorer* page is displayed.
4) Select an activity. The *Details* pane is displayed.
5) Select the **Dependencies** tab.
6) Click the **Add New** icon.
7) Add a predecessor by entering the activity name. You can also click the **View** link to find the dependent activity.
8) Enter the type of dependency. Choose from **Start to Start**, **Start to Finish**, **Finish to Finish**, or **Finish to Start**. 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.
9) Click **Save**.

> **Note**: The Dependencies tab is displayed only if the initiative of the activity template has the *Enable Activity Level Dependencies* feature enabled, and the Activity type has Dependencies enabled.

Editing Activities and Tasks

To edit activities and tasks on an activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link to view a list of existing activities templates.
3) Locate the template you want to edit and click on the name of the activity template. The *Activity Template Explorer* page is displayed.
4) Click the ⊞ icon to view the contents of the activity template.
5) Click on the name of the deliverable or task you want to modify.
6) Make the necessary changes.
7) Click **Update** to save the changes.

Working with Roadmaps

Project Managers can use these pre-determined roadmaps to quickly create projects. Roadmaps are made up of activity templates, which in turn are made up of deliverables that are broken down into tasks.

In This Section

Creating Roadmaps

To create a new roadmap:

1) Click the **Application Configuration** tab.
2) Select the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Click the **Create New Roadmap** button.
4) Select an initiative.
5) Enter a name for the roadmap. This name is used within the system and is not visible to any user other than the System Administrator.
6) Select an activity template from the *Mandatory Activity Template* pull-down menu. All roadmaps must have at least one activity template.

7) Enter the Mandatory Realization Activity Template.
8) Enter other relevant information pertaining to this roadmap. See table below for a description of these fields.
9) Click **Create Roadmap**.

Field	**Description**
Roadmap Family	The options you can choose are based on the initiative you selected.
Is Phase Gated Roadmap?	Select **Yes** if you want each phase on the roadmap to be completed before starting the next phase.
Show Stages as Tabs?	Select **Yes** to have top-level activities appear as separate tabs on the Project Roadmap page. Select **No** to have all the top-level activities appear on the same tab.
Enable WBS Code on Activity	Select **Yes** if you want to the WBS to have a hierarchical numbering structure, for example 1, 1.1, 1.1.1, etc. for activities displayed on a project roadmap.
Allow Template Generated Activities to be Modified?	Select **Yes** if you want users to modify activities that are automatically generated by the activity template.
Scheduling Mode	Select **Manual** or **Semi-Automatic** **Manual**: EnterpriseTrack does not update the dates on the project roadmap when dependent activities are rescheduled or modified. When dependent activities are rescheduled, you have to manually update the activity dates on the Project Roadmap page. **Semi-Automatic**: EnterpriseTrack updates the dates when dependent activities are rescheduled. When dependent activities are rescheduled, you can click the **Schedule** button on the Project Roadmap page for EnterpriseTrack to update the activity dates.
Resource Required to Complete Activities at Top Level?	Select **Yes** if you require resources to be assigned to top-level activities in order to close them. Select **No** if you do not require a resource to be assigned to top-level activities. Select **Activity Type Specific** if you want this value to be the same as the Activity Type setting.
Resource Required to Complete Activities at	Select **Yes** if you require resources to be assigned to activities at other levels in order to close them.

Other Level?	Select **No** if you require no resource to be assigned. Select **Activity Type Specific** if you want this value to be the same as the Activity Type setting.
Allowed Activity Types at Other Levels	Choose the Activity Types allowed at other levels.
Activity Type to Creation-Default Mappings	If activity type to creation default mapping exists, you can select it from the pull-down menu. This mapping allows you to set default field values for roadmap activities so new activities appear on the roadmap as in-line rows.
Is MSP Integration Allowed?	Select **Yes** if you want to allow MSP (Microsoft Project) integration. You must select a template file before you can export or import data. Click the **Browse** button and select a template.
Computation mode for dates and duration	**Internal**: EnterpriseTrack computes the dates and duration. **External read-only**: The calculation for dates and duration comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack. **External read-write**: The calculation for dates and duration comes from MS Project. Project Managers can change the values in EnterpriseTrack.
Computation mode for duration and efforts	**Internal**: EnterpriseTrack computes the duration and effort. **External read-only**: The calculation for duration and effort comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack. **External read-write**: The calculation for duration and effort comes from MS Project. Project Managers can change the values in EnterpriseTrack.
Computation mode for efforts and cost	**Internal**: EnterpriseTrack computes the effort and cost. **External read-only**: The calculation for effort and cost comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack. **External read-write**: The calculation for effort and cost comes from MS Project. Project Managers can change the values in EnterpriseTrack.

Editing Roadmaps

To edit a roadmap:

1) Click the **Application Configuration** tab.

2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want to edit and click the **[Edit] link in the Action** column.
4) Make the necessary changes.
5) Click **Update** to save your changes.

Copying Roadmaps

If you want to create multiple roadmaps that are only slightly different from each other, you can use the copy function. When you have finished creating a new roadmap, you can modify its activity template. See topic ***Adding Activity Templates to a Roadmap*** (on page 48).

To copy an existing roadmap:

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want to copy and click the **[Copy]** link in the **Action** column.
4) Enter a name, and click **Copy**. A complete copy of the roadmap is created.
5) Locate the new roadmap and go on to modify its activity templates by clicking on the name of the roadmap.

Deleting Roadmaps

To delete an existing roadmap:

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want to delete and click the **[Delete]** link in the **Action** column.
4) Click **Ok** in the pop-up dialog box to confirm the deletion.

Changing Status

To edit the status of a roadmap:

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want to edit and click the **[Change]** link in the *Status* column.
4) Change the status of the roadmap. Select **Invalid** if you do not want users to use obsolete roadmaps when creating or editing projects. You cannot create, or edit the roadmap if the status is *Invalid*. If the status is **Valid**, users can use this roadmap. If you select **Archived**, the roadmap cannot be used while creating projects but can be used to edit or filter.
5) Click **Update** to save your changes.

Note: In read-only pages, the Archived roadmaps are suffixed with ^ and Invalid roadmaps are marked with x. While creating projects only valid roadmaps are displayed and while editing, the current roadmap is displayed, but only valid roadmaps are displayed in the drop down option. Archived roadmaps do not cause any validation errors.

Adding Activity Templates to a Roadmap

To add activity templates to a roadmap,

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap to which you want to add an activity template.
4) Click on its name. You will see all the activities that are currently part of the roadmap.
5) Click the **Add Activity Template** button.
6) Select the activity templates you want to add from the **Activity Templates** pull-down menu.
7) Enter the Order ID for this new activity to tell the system where it should be located in the roadmap. You can click the **Existing Order IDs** link to view the existing list before entering a number in this field.
8) Click **Add Activity Template**.

Editing MS Project Import and Export

To edit a roadmap to allow MS Project import/export:

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want and click the **[MS Project]** link in the **Action** column.
4) Select **Yes** if you want to allow MS Project integration.
5) Click the **Browse** button to select a MS Project template file (. mpt).
6) Click **Update.**

Working with Non-WBS roadmaps

In This Section

Creating a Non-WBS Roadmap

You can define a list of activities that are outside of the project roadmap. These activities are defined as 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.

To create a non-WBS roadmap:

1) Click the **Application Configuration** tab.
2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3) Click the **Create a New Non-WBS Roadmap** button.
4) Select an initiative from the drop-down list.
5) Based on the initiative, the **Roadmap family** pull-down will be populated. Choose the appropriate roadmap family.
6) Enter a name for this roadmap.
7) Click the **Change** button and select an icon for this roadmap. This icon will be displayed in Left Navigation Bar.
8) Enter a left navigation menu name for this roadmap.
9) Choose if you want to enable WBS code on activity.
10) Select an Activity Type for this roadmap.
11) If activity type to creation default mapping exists, you can select it from the pull-down menu. This mapping allows you to set default field values for roadmap activities so new activities appear on the roadmap as in-line rows. For more information, see ***Creating Activity Templates*** (on page 41).
12) Click the **Create Non-WBS Roadmap** button.

Managing Non-WBS Roadmaps

Editing a Non-WBS Roadmap

To edit a non-WBS roadmap:

1) Click the **Application Configuration** tab.
2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3) Click the **[Edit]** link next to the roadmap you want to edit.
4) Click **Update** after you have made changes to roadmap.

Deleting a Non-WBS Roadmap

To delete a non-WBS roadmap:

1) Click the **Application Configuration** tab.
2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3) Click the **[Delete]** link next to the roadmap you want to delete.
4) Click **OK** to confirm the deletion.

Changing the Status

To change the status of a non-WBS roadmap:

1) Click the **Application Configuration** tab.
2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.
3) Select a roadmap and click the **[Change]** link under the *Status* column.

4) Choose a status (**Valid**, **Invalid**, or **Archived**) for this roadmap.
5) Click **Update** to save your changes.

Working with Dependency Types

To view the current dependency types:

1) Click the **Application Configuration** tab.
2) Select the **Dependency Types** link. A list of all dependency types is displayed.

Editing Dependency Types

To edit dependency types:

1) Click the **Application Configuration** tab.
2) Select the **Dependency Types** link. You will see a list of all the existing dependency types.
3) Click the **Edit** link associated with the dependency type you want to modify. The *Edit Dependency Types* page is displayed.
4) Enter the new Dependency Type Name and the Dependency Type Code.
5) Click the **Update** button to make the changes.

> **Note:** There are four different predecessor types. You can change the default display name at the initiative level.

Working with Project Types

Project types are a way of classifying projects for reporting purposes. A project type may be associated with one or more roadmaps. For example, you may have a project type called Baseline associated with DMAIC and DMADV roadmaps, and another project type called Just Do It associated with the DMAIC-Short and DMADV roadmaps.

Adding a Project Type

To create a new project type:

1) Click the **Application Configuration** tab.
2) Click the **Project Type** link. You will see a list of all the existing project types.
3) Click the **Create New Project Type** button. The *Pulldown Values for Project Type* page is displayed.
4) In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the **Initiative** pull-down menu.
5) Enter a name for the roadmap. This name will be used within the system and will not be visible to any user other than the system administrator.
6) Based on the initiative, the Roadmap family pull-down will be populated. Choose the appropriate roadmap family for your new project type.
7) Select the roadmaps that are to be associated with this project type. Hold down the **Control** key and click to select multiple values.

8) Click **Create** to save the new project type.

Editing a Project Type

To edit a project type:

1) Click the **Application Configuration** tab.
2) Click the **Project Type** link. You will see a list of all the existing project types.
3) Click the name of the project type to be edited.
4) Make the required changes and click **Update** to save your changes.

Working with Resource Assignment Types

Resource Assignment allows you to manage responsibility charting. You can identify functional areas, key activities, and decision points by defining roles and responsibilities. There are four different types of resource types (RACI) that you can assign in a project:

- Accountable (A): Individual who is ultimately responsible for a project with a yes/no authority. One function can have only one accountable person.
- Responsible (R): Individual working on the activity and responsible for action and execution of the plan.
- Consult (C): Individual who must be consulted prior to a final decision or action. This involves a two-way communication.
- Inform (I): Individual that needs to know of the decision or action. This is usually a one-way communication.

Adding a Resource Assignment Type

To create a new resource assignment type:

1) Click the **Application Configuration** tab.
2) Select the **Resource Assignment Types/ RACI** link. You will see a list of all the existing resource assignment types.
3) Click the **Create New Assignment Type** button. The *Create Resource Assignment Type* page is displayed.
4) In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the Initiative pull-down menu.
5) Enter a name and a short name for the new assignment type.
6) Select **Yes** to enable this assignment type.
7) Select **Yes** to add this type towards project finance calculation.

   If **Consider for Project Finances** setting is **Yes**, then AET effort flows to finances. If set to **No**, then users assigned with this assignment type will not have their effort on the activity monetized into the project finances
8) Enter the Sort Order for this new assignment type. You can click the **Order of Existing Types** link to view the existing list before entering a number in this field.
9) Click **Save**.

Editing a Resource Assignment Type

To edit an existing resource assignment type:

1) Click the **Application Configuration** tab.
2) Select the **Resource Assignment Types/ RACI** link. You will see a list of all the existing resource assignment types.
3) Click the **Edit** link associated with the resource assignment type you want to modify. The *Edit Resource Assignment Type* page is displayed.
4) Make the required changes and click **Update** to save your changes.

Configuring Status Indicator

System administrators must configure and manage the status indicators displayed in the Tree pane within the Strategy section of EnterpriseTrack. You can create multiple status indicator lists. Each status indicator list can have a number of items, each with its own color and value assigned to it. You can also choose to have the indicator icon blink.

Creating a Status Indicator

To create a new status indicator:

1) Click the **Application Configuration** tab.
2) Select the **Status Indicator** link.
3) Click the **Create a New Status Indicator** button.
4) Add items as required and specify the color and value for each one
5) Click the **Add Status Indicator** button to add this configuration to the list of status indicators in the system.

Project Settings

In This Section

Configuring Percentage Completion

Use the *Percent Completion Type* page to select how EnterpriseTrack should calculate the percentage complete for projects. For each initiative defined in your system, you can select a default from the following choices:

- **Manual Mode**: Users can manually enter a number from the Project Basics page.

- **Effort-based (Actual vs Planned Effort for Immediate Children)**: Percentage complete is calculated based on the duration/actual effort and the planned effort of all top-level tasks.
- **Effort-based (Actual vs Planned Effort for All Children)**: Percentage complete is calculated based on the duration/actual effort and the planned effort of all tasks.
- **Count-based (Completed vs Total Count for Immediate Children)**: Percentage complete is calculated based on the number of completed tasks and the total number of top-level tasks.
- **Count-based (Completed vs Total Count for All Children)**: Percentage complete is calculated based on the number of completed tasks and the total number of all tasks.

To configure the percent completion type:

1) Click the **Application Configuration** tab.
2) Select the **Percent Completion Type** link.
3) Click the **[Edit]** link next to your initiative.
4) From the drop-down menu, select the percent completion type.
5) Click **Update** to save your changes.

Auto Close Parent Activity

Use the *Auto Close Parent Activity* page to automatically close parent activities when all tasks and deliverables associated with the parent activity are complete. For each initiative you can choose to auto close parent activities.

If you select **Yes**, then the parent activity is automatically closed when the last deliverable in current phase is marked complete. The project phases automatically advance till the project is in the last phase. After all deliverables in the last phase are closed, the last phase remains open till the Project Lead or a user with project close permission clicks on the **Close Project** button and closes the project.

If you select **No**, you must manually close each phase to move to the next phase.

To modify the auto-close feature:

1) Click the **Application Configuration** tab.
2) Select the **Auto Close Parent Activity** link.
3) Click the **[Edit]** link next to your initiative.
4) Select **Yes** or **No**.
5) Click the **Update** button to save your changes.

Official Phase Start and Close Defaults

Use the *Official Phase Start and Close Defaults* page to choose how you want the phase start date and the phase close date to be calculated.

To set the official phase start and close defaults:

1) Click the **Application Configuration** tab.
2) Select the **Official Phase Start and Close Defaults** link.
3) Click the **[Edit]** link next to default you want to change.

4) Make your selection.
5) Click the **Update** button to save your changes.

Manage Detail Section Display Preference

You can set how you want the detail section to display. You can choose to have it in the main page, as a pop-up or as a split pane.

To modify the detail section display mode:

1) Click the **Application Configuration** tab.
2) Select the **Detail Section Display Preference** link.
3) Click the **[Edit]** link next to the initiative.
4) From the pull-down menu select from **Split Pane Screen**, **Pop-up Screen**, or **Main Screen**.
5) Click the **Update** button to save your changes.

Specify Levels to Pre-fill

Use the *Specify Levels to Pre-fill* page to select the organizational levels you want to pre-populate. The levels are pre-filled in the Ideas, Proposals, and Projects pages based on the profile of the user that is logged in.

To choose a level:

1) Click the **Application Configuration** tab.
2) Select the **Org Levels to Pre-fill** link.
3) Click the **Edit** link next to your initiative.
4) Specify a level from the drop-down menu.
5) Click **Update**.

Manage Project Cycle Time Mode

To manage the project cycle time mode:

1) Click the **Application Configuration** tab.
2) Select the **Project Cycle Time Mode** link.
3) Click the **[Edit]** link next to the initiative.
4) From the pull-down menu select from **Compute Cycle Time from Project Duration**, or **Compute Cycle Time from Summation of Cycle Times of Top Level Activities**.
5) Click the **Update** button to save your changes.

Set Minimum Slacks for Critical Path

Slack is the amount of time a task can be delayed without impacting the start date of a subsequent task. Use the **Minimum Slack for Critical Path** link to enter the minimum slack (in days) after which a task will be on the critical path.

To set the minimum slack:

1) Click the **Application Configuration** tab.
2) Click **Minimum Slack for Critical Path**.
3) Enter the minimum slack.
4) Click **Update**.

Configuring Organizational Hierarchy

Oracle recommends that you create an organizational hierarchy to ensure that all your resources, ideas, proposals and projects are associated with appropriate units within your organization. You can specify five levels in your organization hierarchy; the first two levels are always displayed, the other three are displayed only if it was set up during the initial configuration of your system. Your system may be configured to require you to enter values for each of the five levels.

The default levels, hierarchies and the dependencies between the levels are created during the initial configuration of the system. A sample system might contain the following levels:

1) Division
2) Business Unit
3) Business Sub-unit
4) Location
5) Regions

You can add, edit, and delete values within each level using the links under **Organization Hierarchy**.

In This Section

Adding New Values

To add new values to each level of your organization hierarchy:

1) Select the **Application Configuration** tab.
2) Select a level from the Organizational Hierarchy section. For example **Division**, **Business Unit**, **Business Subunit**, **Location**, or **Regions**. The names of these levels may vary depending on your configuration.
3) Click **Create a New Division**. The name of this button is based on the level you selected in the previous step.
4) Enter a name.
5) Enter a charge back code. This field is optional.
6) Click **Create**.

Editing Existing Values

You can change the name, charge back code, and status of any of the existing values. You can modify the status of any of the five levels of your organization hierarchy to:

- **Valid**: Users can use this level when adding or editing resources, ideas, proposals, or projects.
- **Invalid**: Users cannot use this level.
- **Archived**: Users can use this level when editing or filtering existing resources, ideas, proposals or projects. The historic value is preserved but it cannot be used when creating new projects.

Changing the status on one level of the hierarchy can indirectly affect the other four levels. For example, if you mark BU1 as Archived and Europe is Invalid then the overall relationship status for:

- Division1 → BU2 → Asia → China → Shanghai is Valid.
- Division1 → BU1^→ Asia → China → Shanghai is Archived.
- Division1 → BU1^→ Europe x→ England → London is Invalid.

In read-only pages, the archived hierarchies are suffixed with ^ and invalid hierarchies are marked with an x. When creating new projects only valid hierarchies are displayed in the drop-down option. When editing existing projects, the current hierarchy is displayed and only valid hierarchies are displayed in the drop-down option. Archived hierarchies do not cause any validation errors.

To edit the existing values for each level of your organization hierarchy:

1) Select the **Application Configuration** tab.
2) Select the appropriate level from the Organizational Hierarchy section, for example **Division**, **Business Unit**, **Business Subunit**, **Location**, or **Regions**. The names of these levels may vary depending on your configuration.
3) Click the **Create a New Division** button. The name of this button varies based on the level you selected in the previous step.
4) Locate the value you want to edit and click the **[Edit]** link.
5) Modify the name, charge back code, or status.
6) Click the **Update** button.

Deleting Values

To delete existing values in your organizational hierarchy:

1) Select the **Application Configuration** tab.
2) Select the appropriate level from the Organizational Hierarchy section, for example **Division**. The names of these levels may vary depending on your configuration. A list of values for the level you selected displays.
3) Click the **[Delete]** link next to value you want to delete.
4) Click **OK** to confirm the deletion.

Note: Deleted values are not available anywhere in the system. If there are hierarchies and dependencies, you must first resolve these before deleting the values.

Reassigning Relationships

You can reassign all resources, ideas, proposals, and projects belonging to one Business Unit to another Business Unit within your organization hierarchy.

To reassign relationships:

1) Select the **Application Configuration** tab.
2) Select the appropriate level from the Organizational Hierarchy section, for example **Division**, **Business Unit**, **Business Subunit**, **Location**, or **Regions**. The names of these levels may vary depending on your configuration.
3) Click the **[Reassign]** link next to the Business Unit you want to reassign.
4) Select a new Business Unit from the drop-down menu.
5) Click **Reassign**.

Creating Hierarchical Relationships

You can create and manage the relationships between the levels in your organization hierarchy. For example, you could create a hierarchical relationship between Division, Business unit and Location. You cannot edit these relationships, but you can delete and create new relationships.

Note: The options you see are set during the initial configuration of your system.

To create a new hierarchical relationship:

1) Select the **Application Configuration** tab.
2) Click the **Hierarchical Relationships** link.
3) Click the **Create new Hierarchical Relationship** button.
4) Enter a name.
5) Click to select the combination of levels you want to include in this hierarchical relationship.
6) Click **Create**.

Configuring Status Reports

In This Section

Manage Status Reports

You can use the *Manage Status Report* page to configure status reports. You can choose the sections you want displayed, change the section names, change the name of the submit button, and also set the frequency of status reports

To manage status reports:

1) Select the **Application Configuration** tab.
2) Click the **Status Reports** link. The *Manage Status Report* page is displayed.
3) Select the status report you want to edit.
4) Make the necessary changes and click the **Save** button.

Configuring Custom Sections for Project Status Report

EnterpriseTrack allows users to complete and submit status reports for each project. Some of the fields included in the status report are pre-defined within the system, but as an Administrator, you can specify additional fields that should be part of the weekly status reports. These additional fields are added as text boxes to the status report.

To create and manage project related status reports sections:

1) Select the **Application Configuration** tab.
2) Click the **Status Report Sections** link. All the available sections are listed.
3) To modify an existing section, click the **Edit** link.
4) To create a new section, click the **Create New Section** button.
5) To delete an existing section, click the **Delete** link.

Manage Key Statuses

You can use the *Key Statuses* page to set status descriptions for the keys. For each initiative, you can create multiple statuses. For example, you can create a status called *On Time*, or *Red*, or any numeric value that describes the status of keys.

To create a status for keys:

1) Select the **Application Configuration** tab.
2) Click the **Key Statuses** link.
3) Click the **Add a New Key Status** button.

4) Enter a description of the status.
5) Select if you require users to add an explanation for this status.
6) Click **Update**.

To manage statuses:

1) Select the **Application Configuration** tab.
2) Click the **Key Statuses** link.
3) To edit the status:
4) Click the **[Edit]** link next to the status you want to edit.
5) Make the necessary changes and click the Update button
6) To delete a status:
7) Click the **[Delete]** link next to the status you want to delete.
8) Click OK to confirm the deletion.

Manage Keys

You can use the *Status Report Keys* page to create and manage keys that appear on status reports. For each initiative, you can configure multiple keys. For example, you can create a key called *Time* or *Budget*.

To create a key:

1) Select the **Application Configuration** tab.
2) Click the **Keys** link. The *Status Report Keys* page is displayed.
3) Click the **Add a New Status Report Key** button. The *Create Status Report Key* page is displayed.
4) Select an initiative from the drop-down menu.
5) Enter a name for this key.
6) Select if you want this to be an aggregate key.
7) Enter an order ID. This determines where it is displayed in status reports.
8) Click **Create**.

To manage keys:

1) Select the **Application Configuration** tab.
2) Click the **Keys** link.
3) To edit the status:
4) Click the **[Edit]** link next to the key you want to edit.
5) Make the necessary changes and click the Update button
6) To delete a status:
7) Click the **[Delete]** link next to the key you want to delete.
8) Click **OK** to confirm the deletion.

Calendars

In This Section

Manage Calendars

The *Calendars* section allows you to manage calendars by editing a calendar, copying a calendar, viewing calendar usage, and viewing the exception list of a selected calendar. You can also create a new calendar from this section, see topic ***Create a New Calendar*** (on page 61).

Edit a Calendar

To edit a calendar, follow the steps below:

1) Click the **Application Configuration** tab.
2) Select the **Calendars** link. The main *Calendars* page is displayed.
3) Click the **Edit** link next to the calendar you want to edit. The *Manage Calendars* page is displayed.
4) You can edit the calendar by making changes to the number of working days, the number of working hours, or by adding/deleting exceptions.
5) To delete an exception, click on a date to select it. The *Manage Exception* pop-up window is displayed. Click **Delete**.
6) Click **Save** to save this calendar, or click **Save and Close** to save and return the main *Calendar* page.

Copy a Calendar

To copy an existing calendar, follow the steps below:

1) Click the **Application Configuration** tab.
2) Select the **Calendars** link. The main *Calendars* page is displayed.
3) Click the **Edit** link next to the calendar you want to copy. The *Manage Calendars* page is displayed.
4) Click the **Copy** button on the top right corner of the screen.
5) A pop-up window is displayed. Enter a name for this copy.
6) Select if you want to copy the exceptions.
7) Click **OK**.

View Usage

To view the calendar usage, do the following:

1) Click the **Application Configuration** tab.
2) Select the **Calendars** link. The main *Calendars* page is displayed.

3) Click the **Edit** link next to the calendar you want to view. The *Manage Calendars* page is displayed.
4) Click the **View Usage** button on the top right corner of the screen. A list of projects and proposals that use this calendar are displayed.

View Exceptions List

To view the exception list of a calendar, do the following:

1) Click the **Application Configuration** tab.
2) Select the **Calendars** link. The main *Calendars* page is displayed.
3) Click the **Edit** link next to the calendar you want to view. The *Manage Calendars* page is displayed.
4) From the *Exceptions List* tab on the bottom of screen, click the calendar icons to select a *From date* and *To date*.
5) Click **Apply** to view all exceptions in the selected date range. You can click the **Reset** button to reset to a selected month.

Create a New Calendar

To create a new calendar for your organization, follow the steps below:

1) Click the **Application Configuration** tab.
2) Select the **Calendars** link. The main *Calendars* page is displayed.
3) Click the **Create** button.
4) A pop-up window is displayed. Enter a name for your calendar and click **OK**. The *Manage Calendars page* is displayed.
5) Enter the number of working hours per day.
6) Choose the status **Valid**, **Invalid**, or **Archived**.
7) Select **Yes** you want this to be the default calendar.
8) Click to select the working days. From the calendar you can click the tab for each month and year. Click on any date to set an exception. The *Manage Exceptions* pop-up window displays. Enter the name for the exception and choose if you want it to be considered a working day or a non-working day. Click **Save**.
9) Click **Save** to save this calendar, or click **Save and Close** to save and return the main *Calendar* page.

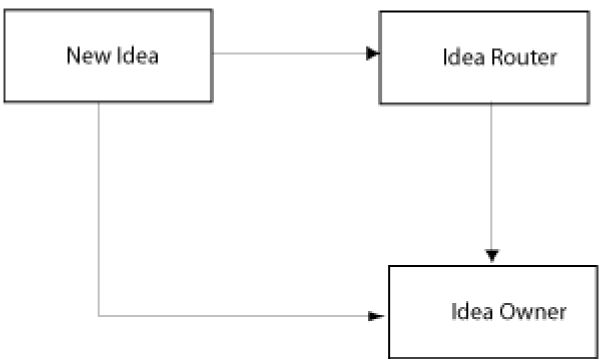
Routing

In This Section

Configuring Idea Routing

EnterpriseTrack allows users to quickly create new ideas and convert them into proposals and projects. To ensure that the appropriate users get to view idea before they are assigned to an owner, the system allows the system administrator to create an idea routing scheme.

When a user creates a new idea, it can automatically be routed to an "Idea router" or "Idea Assigner". This individual will have the responsibility to review the idea and assign it to an "Idea Owner" or "Idea Assignee".



This functionality becomes infinitely more useful with the ability to create multiple routing schemes based on your organizational hierarchy. You can create one global routing scheme and then create specific routing schemes for each of your departments. The routing scheme based on the units of the organizational hierarchy will override the global settings.

For example, let us assume that the global settings specify an Idea Router, but routing scheme for the Denver, CO division in the Finance department has a routing scheme that allows ideas to be routed directly to an Idea Owner. When a member of the Denver, CO division in the Finance department creates an idea, it will get routed directly to the idea owner. All other ideas will get routed to the global default Idea Router.

Create Idea Routing

> **Important!**
>
> Ensure that you have created users who will be Idea Routers and Idea Owners before proceeding with the creation of a new idea routing.

To create a new idea routing scheme:

1) Click the **Application Configuration** tab.
2) Click the **Idea Routing** link. You will see a list of all the existing idea routing schemes.

3) Click the **Create a New Idea Routing** button.
4) Select the appropriate organizational units for which this idea routing scheme will be applicable from the pull-down menus.
5) Select whether you want the idea to be routed to an Idea Router or directly to an Idea Owner.
6) Select the user who will fulfill the position you chose in the previous step.
7) Enter an Order ID for this idea routing. This will determine the order in which the idea routing rules are evaluated. The Order ID should be less than the default global routing scheme. You can click the **View Existing Order IDs** link to view the existing list before entering a number in this field.
8) Click **Create** to save the new idea routing scheme.

Editing Idea Routing

To edit an idea routing:

1) Click the **Application Configuration** tab.
2) Click the **Idea Routing** link. You will see a list of all the existing idea routing schemes. Locate the idea routing you want to edit and click the **[Edit]** link in the *Action* column.
3) Make the required changes.
4) Click **Update** the save the changes.

Deleting Idea Routing

The Global idea routing cannot be deleted. To delete one of the other idea routings:

1) Click the **Application Configuration** tab.
2) Click the **Idea Routing** link. You will see a list of all the existing idea routing schemes.
3) Locate the idea routing you want to delete and click the **[Delete]** link in the *Action* column.
4) You may be required to confirm the delete action.
5) Click **Ok** to delete the selected idea routing.

Configuring Approver Routing

Create New Approver Routing

To create a new approver routing scheme, do the following:

1) Click the **Application Configuration** tab.
2) Click the **Approver Routing** link. You will see a list of all the existing approval routing schemes.
3) Click the **Create New Approver Routing button** to display the Create Approval Routing page.
4) From the pull-down menus, select the Initiative, Division, Business Unit, Location, Regions, Role and Approver.

5) Enter an Order ID for this approval routing. This will determine the order in which the approval routing rules are evaluated. The Order ID should be less than the default global routing scheme. You can click the **View Existing Order IDs** link to view the existing list before entering a number in this field.
6) Click **Create** to create a new approver routing scheme. Click **Cancel** to leave the page without saving your changes.

Edit Approver Routing

To edit approver routing scheme, do the following:

1) Click the **Application Configuration** tab.
2) Click the **Approver Routing** link. You will see a list of all the existing approval routing schemes.
3) Locate the approver routing you want to edit and click the **Edit** link in the Action column.
4) On the **Edit Approval Routing** page make the required changes.
5) Click **Update** the save the changes. Click **Cancel** to leave the page without saving your changes.

Delete Approver Routing

1) Click the **Application Configuration** tab.
2) Click the **Approver Routing** link. You will see a list of all the existing approval routing schemes.
3) Locate the approver routing you want to delete and click the **Delete** link in the Action column.
4) You may be required to confirm the delete action.
5) Click **Ok** to delete the selected approver routing. Click **Cancel** to retain the approver routing in the system.

Configuring Custom fields

In This Section

Editing Pre-defined Custom Fields

Pre-defined custom fields are created during the initial configuration you system. You cannot create new fields or delete existing fields. As an Administrator you can only edit the existing fields.

To edit the pre-defined custom fields:

1) Click the **Application Configuration** tab.
2) Click the **Custom Fields** link. The *Manage Custom Fields* page is displayed. The fields are organized by section e.g., Ideas, Proposal, Project, Program and Resource.

3) Click the link associated with the section you want to edit, for example *Manage Custom Fields for Ideas*. The Manage Custom Field for Ideas page is displayed.
4) Click the **[Edit]** link next to the field you want to modify.
5) You can edit the following fields:
    - **Field Name**: The name for this custom field.
    - **UI Section:** Select a section within which this field should display. For example, you can choose to display a project custom field under Basics, Classification, or Organization. This field displays only if you are configuring custom fields for Ideas, Proposals or Projects.
    - **Display on List Pages**: Select **Yes** if you want this field to appear on List pages.
    - **Display in Filters**: Select **Yes** if want this field to display as an option in the Filter dialog box.
    - **Update Status of Possible Values**: For each value select **Valid**, **Invalid** or **Archived**. Users can use field values that have the status Valid, and field values with the status Invalid cannot be used in the system. Archived field values are maintained but they are not displayed as a valid field option.
    - **Idea Custom Field Mapping for Proposals** or **Proposal Custom Field Mapping for Projects**: Select the Idea or Proposal/Charter field that it maps to. When a proposal is accepted and a project is created, the proposal custom fields are copied into the project custom fields based on this mapping.

> **Note:** *You can have one custom proposal/charter field map to multiple project custom fields.*

6) Click **Update**.

Configuring User Defined Custom Fields

To create user-defined custom fields:

1) Click the **Application Configuration** tab.
2) Click the **Custom Fields** link. The *Manage Custom Fields* page is displayed. The fields are organized by section e.g., Ideas, Proposal, Project, Program and Resource.
3) Click the link associated with the section you want to edit, for example Manage Custom Fields for Ideas. The Manage Custom Field for Ideas page is displayed.
4) Click the **Create a New User Defined Field** button.
5) Enter a field name.
6) Choose the type of field you are creating. You can select one of the following types: Unassigned, Float (a number with a decimal point), Integer, List, Multi List, Text, Date, Currency, Boolean, Notes, Global Resource, or Label.

> **Note**: For field type list, the order in which the values are entered is the order in which they are sorted.

7) Configure the following optional field setting:

1. **UI Section**: Select a section within which this field should display. For example, you can choose to display a project custom field under Basics, Classification, or Organization. This field displays only if you are configuring custom fields for Ideas, Proposals or Projects.
2. **Initiative**: Select the initiative that this field belongs to.
3. **Visible**: Select **Yes**, **No**, or **Context Sensitive**. If you select context sensitive, then enter the conditions when this field should be displayed. You can choose to display this field only when the selected value in a particular field is equal to, is not equal to, includes, or does not include a particular value. The Context Sensitive option displays only if you are configuring custom fields for Ideas, Charters, and Projects.
4. **Display on List Page**: Select **Yes** if you want this field to appear on list pages.
5. **Display in Filter**: Select **Yes** if you want this field to appear as an option in the Filters dialog box.
6. **Required**: Select **Yes** if you require users to enter a value for this field.
7. Based on the type of field you selected, enter the default, minimum, maximum and valid values for this field. To enter multiple values in the Valid Values field, enter one value per line. The order in which you enter values is the sort order in which these values are displayed.
8. **Idea Custom Field Mapping for Proposals** or **Proposal Custom Field Mapping for Projects**: Select an Idea or Proposal/Charter field that maps to this Project or Proposal. When a Proposal is accepted and a project is created, or when an Idea is accepted and a Proposal is created, the custom fields are copied to the Project or Proposal custom field based on this mapping.

Notes:

- *You can have one custom proposal/charter field map to multiple project custom fields.*
- *When the Context Sensitive option is chosen, the default field value is used for Ideas and Projects that already exist in the system.*
- *For custom field values to be maintained when Ideas move to Charters, or when Charters move to Projects, the target custom field needs to be set to be visible.*

8) Enter a Sort ID. This ID tells the system where it should be located in the list of user defined fields. You can click the **Order of Existing Fields** link to view the existing list before entering a number in this field.
9) Click **Create.**

Important: You cannot delete custom fields after they are created. You can hide the field by selecting **No** in the **Visible** field.

Configuring Pulldown values

You can use the **Pulldown Values** section of the **Administration** module to define various items that are displayed in pull down menus throughout the system. Within Enterprise Track there can be two types of pull-down values, Global and Initiative-specific. In systems that have a single initiative, the 'global' fields will not be distinguished from the initiative specific ones.

Global

In installations that support multiple initiatives within the same system global fields will remain the same across initiatives. To configure these values, refer to the topic ***Configuring Global Pull down Values*** (on page 67).

Initiative-Specific

These fields are initiative specific and can be different for different initiatives within the system. To configure these values, refer to the topic ***Configuring Initiative-Specific Pull down Values*** (on page 68).

In This Section

Configuring Global Pull down Values

Within EnterpriseTrack there can be two types of pull-down values, Global and Initiative-specific. In systems that have a single initiative, the global fields will not be distinguished from the initiative specific ones.

Although the types of global pull down fields are themselves configurable, the following fields will most likely be available in your system:

Functional Area

The values you enter here will be displayed as choices for the functional area when a user creates a new proposal or project within EnterpriseTrack. Functional areas are independent of initiatives.

Project Source

The values you enter here will be displayed as choices for the project source when a user creates a new proposal or project within EnterpriseTrack. Project sources are independent of initiatives.

Tool Type

The values you enter here will be displayed as choices when a user creates a new tool template in the Knowledge Base. If you want to define initiative specific tool types, follow the instructions in ***Configuring Initiative-Specific Pull down Values*** (on page 68)

Document Type

The values you enter here will be displayed as choices when a user creates a new global document in the Knowledge Base. If you want to define initiative specific document types, follow the instructions in ***Configuring Initiative-Specific Pull down Values*** (on page 68)

Area of Expertise

The value enter here is displayed as choices when a user request a new resource. The area of expertise can be used to make approval requests.

Creating global pull down values

1) Click the **Application Configuration** tab.
2) In the **Global Pull down Values** section, click on the type of global pull down value you want to create.
3) You will see a list of the existing values for that category. For example, if you chose Functional Area, you will see a list of the functional areas that have already been defined in the system.
4) Click the **Create a New Functional Area** button.
5) Enter a name for the value.
6) For Note Type, Document Type, and Project Priority, you can enter a sort ID.
7) Click **Create**.

Editing global pull down values

1) Click the **Application Configuration** tab.
2) In the **Global Pulldown Values** section, click on the type of global pull down value you want to edit.
3) You will see a list of the existing values for that category.
4) Click on the name of the value you want to edit.
5) In the *Edit Pulldown Value for Functional Area* page make the required changes.
6) Click **Update**.

Deleting global pull down values

Once created, the Global pull down values cannot be deleted through the user interface. Contact Oracle Customer Support for more information.

Configuring Initiative-Specific Pull down Values

Within EnterpriseTrack there can be two types of pull-down values, Global and Initiative-specific. In systems that have a single initiative, the Global fields will not be distinguished from the Initiative specific ones.

Although the types of initiative-specific pull down fields are themselves configurable, the following fields will most likely be available in your system:

Assets

The values you enter here will be displayed as choices for *Assets* that can be assigned to a user.

Areas of Expertise

The values you enter here will be displayed as choices for *Areas of Expertise* that can be assigned to a user.

Certification Types

The values you enter here will be displayed as choices for *Certification types* that can be assigned to a user. You can also specify whether a particular certification type is part of a certification wave and the number of professional units associated with it.

Document Type

All document types have to be situated within an initiative. The values you enter here will be displayed as choices for *Document Type* when a user adds a new document within a specific project. If you want the same document type to be available for multiple initiatives, you must create it for each initiative.

Metric Type

All metric types have to be situated within an initiative. The values you enter here will be displayed as choices for *Metric Type* when a user adds a new metric within a specific project. If you want the same metric type to be available for multiple initiatives, you must create it for each initiative.

Note Type

All note types have to be situated within an initiative. The values you enter here will be displayed as choices for *Note Type* when a user creates a note within a specific project. If you want the same note type to be available for multiple initiatives, you must create it for each initiative.

Task Type

All task types have to be situated within an initiative. The values you enter here will be displayed as choices for *Task Type* when a user creates a task within a specific project. If you want the same task type to be available for multiple initiatives, you must create it for each initiative.

Tool Type

The values you enter here will be displayed as choices when a user creates a new tool template with a specific project. If you want to define global tool types, follow the instructions in ***Configuring Global Pull down Values*** (on page 67)

Document Type

The values you enter here will be displayed as choices when a user creates a new initiative-specific document in the Knowledge Base. If you want to define global document types, follow the instructions in ***Configuring Global Pull down Values*** (on page 67)

Creating initiative-specific pull-down values

1) Click the **Application Configuration** tab.
2) In the **Pulldown Values** section, click on the type of Initiative pull down value you want to create. Choose from **Note type**, **Task Type**, **Tool Type** and **Document Type**.
3) You will see a list of the existing values for that category for each initiative in the system. For example, if you chose *Task Types*, you will see a list of the task types that have already been defined in the system.
4) Click the **Create a New Task Type** button.

5) In the **Edit Pulldown Value for Task Type** page choose the initiative for which you are creating the task.
6) Enter a name for the value. This name is used internally and will not be visible to the users.
7) Enter a **User Visible Name** for the functional area. This name will be displayed in the pull-down menus across the system.
8) Click **Create**.

Editing initiative-specific pull-down values

1) Click the **Application Configuration** tab.
2) In the **Pulldown Values** section, click on the type of Initiative pull down value you want to edit. Choose from **Note type**, **Task Type**, **Tool Type** and **Document Type**.
3) You will see a list of the existing values for that category for each initiative in the system. For example, if you chose *Task Type* you will see a list of the task types that have already been defined in the system for each initiative.
4) Click on the name of the value you want to edit.
5) In the **Edit Pulldown Value for Task Type** page make the required changes.
6) Click **Update**.

Deleting initiative-specific pull-down values

Once created, the Initiative pull-down values cannot be deleted through the user interface. Contact Oracle Customer Support for more information.

General Settings

In This Section

Company Settings

In This Section

Viewing Account Properties

Use the *Account Properties* link to view the account name, SiteWand version, account character encoding type, account authentication type, and account time zone.

To view your account properties:

1) Click the **General Settings** tab.
2) Select the **Account Properties** link.

Managing Company Information

You can use the *Company Information* page to add your company name, company URL, product name and footer.

To edit your company information:

1) Select the **General Settings** tab.
2) Click the **Company Information** link. The *Edit Company Information* screen is displayed.
3) Enter the appropriate values.
4) Click **Update**.

Managing Company Logo

Use the *Company Logos* page to upload your company logo. You can add a logo to the EnterpriseTrack header and the login page.

To upload you company logo:

1) Select the **General Settings** tab.
2) Click the **Company Logos** link. The *Edit Company logo* page is displayed.
3) Click **Browse** to find the image. The preferred image formats are JPEG, GIF, PNG and BMP. The logo size on the login page is 278 x 17 pixels and the header logo size is 232 x 18 pixels.
4) Click **Update**.

Managing Default Date Format

Use the *Default Date Format* page to select a default date format to use in EnterpriseTrack.

To select a default date format:

1) Click the **General Settings** tab.
2) Select the **Default Date Format** link. The *Edit Default Date Format screen* is displayed.
3) Select a format from the drop-down list.
4) Click **Update**

Managing Default Time Format

Use the *Default Time Format* page to select a default time format to use in EnterpriseTrack.

To select a default time format:

1) Click the **General Settings** tab.
2) Select the **Default Time Format** link. The *Edit Default Time Format screen* is displayed.
3) Select a format from the drop-down list.
4) Click **Update**

Internationalism

In This Section

Working with the Language Catalog

You can use the Language Catalog page to edit the language catalog. If you have customized EnterpriseTrack with custom terms or configuration data, you can add or edit the translations using the Language Catalog page. If you have a large number of custom strings that require translation, you can export the language catalog as an XLIFF file, translate the strings and import it into EnterpriseTrack.

Notes:

- Oracle recommends that you save a copy of your language catalog in each language before you modify the catalog or before you import a new language catalog.
- You must first click the **Scan Language Catalog** button to ensure that the catalog has all static strings that contain the customized terms before you begin modifying the language catalog.

Using the Language Catalog Filter

To use the language catalog filter:

1) Select the **General Settings** tab.
2) Click the **Language Catalog** link. The *Language Catalog Filter* page is displayed.
3) Click the **Scan Language Catalog** button.
4) When the scan is complete, select the filtering criteria from the *Language Catalog Filter* page. Since the catalog can contain thousands of terms, it is recommended that you set some high level filtering options (e.g. by language, or category) for ease of use.
5) Choose the number of results you want displayed on each page.
6) Choose the status (Translated or Not yet Translated).
7) Click **Apply**. The *Language Catalog* page displays a list of terms that meet your criteria.

> **Tip:** When the list is displayed, you can view the details of the current filter by clicking the **Show Current Filters** icon. You can also filter by selecting a language from the displayed options.

Editing the Language Catalog

To edit the language catalog:

1) From the *Language Catalog* page, click the **Edit** link next to the term you wish to edit. The *Edit Language Catalog* page is displayed. You may have to navigate through multiple pages using the **<< < > >>** keys to locate the correct page.
2) Make the appropriate changes.
3) Click the **Update** button to save your changes.

Exporting and Importing the Language Catalog

1) From the *Language Catalog* page, click the **Export** button and click **OK** to save the XLIFF file.
2) From the *Language Catalog Filter* page, click the **Browse** button and select the translated XLIFF file, and click **Import**.

> **Notes:**
>
> - PDF reports in Russian, Korean, Japanese, and Chinese are displayed correctly only if they are run by users in corresponding locales.
> - No user data is translated. For example, project names and descriptions are not automatically translated; they are displayed in the language of the user that created them.
> - Administration and configuration can only be done in English.

Help Settings

In This Section

Managing Evaluation And Fields Help

You can choose to leave the initial configuration setup help as is or you can attach a help document (Word, Excel, HTML, PDF etc.), or point users to an URL address (internet, intranet, SharePoint, Wiki, etc.).

To select the type of help you will provide for configuration setup:

1) Click the **General Settings** tab.
2) Select the **Evaluation And Fields Help** link.
3) Select an entity (for example, Proposal/Project fields or Idea Evaluation) and click the **Edit** link next to it. The *Edit Help Type* screen is displayed.
4) Choose the type of help you will provide:
    - Select **Initial Deployment Setup** to use the initial configuration help.
    - Select **Document** and click the **Browse** button to select and upload a document.
    - Select **URL** and type the address.
5) Click **Update**.

Managing User Productivity Kit

To manage the User Productivity Kit:

1) Click the **General Settings** tab.
2) Select the **User Productivity Kit** link. The *Administration: Manage User Productivity Kit* screen is displayed.
3) To change the base URL:
    a. Click the **Edit** link next to *User Productivity Kit Content Base URL*.
    b. Update the URL address and click **Update**.
4) To change the application identifier:
    a. Click the **Edit** link next to *User Productivity Kit Application Identifier*.
    b. Update the identifier and click **Update**.

Specifying Online Help URL

Use the *Online Help URL* page to specify a new URL location to launch the Online Help when Help is selected from the application. If you choose to deploy a local version of the help you can enter the URL in the following format: *http://<hostname>:port/help/*. You can also leave the default URL to launch the online help from the Oracle Technology Network (OTN) site. Using OTN ensures that you always have the most current help content.

To change the default Online Help URL:

1) Click the **General Settings** tab.
2) Select the **Online Help URL** link.
3) Specify a new URL location to launch Online Help.
4) Click **Validate**.
5) Click **Update**.

Notifications/Emails

In This Section

Configuring Email Notifications

EnterpriseTrack periodically sends out informational and warning emails to its users. As the System Administrator, you can manage the To, CC and Bcc list as well as the subject of each of these emails. These settings can be over-written at the project level by users with the appropriate permissions.

To manage notifications:

1) Click the **General Settings** tab.
2) Select the **Notification Configuration** link. You will see the list of Email notifications that have been configured for each Email group in your system.
3) Click the **Edit** link in the *Action* column of the appropriate Email Notification.
4) On the **Edit Email** page, select the check box to enable the notification. Uncheck the box to disable it.
5) To modify the To, CC and Bcc addresses, click in the appropriate field and select the roles from the Email list menu on the right. You can select multiple entries by holding down the **Ctrl** key on your keyboard. You can also select the roles one at a time; just separate the values with a comma.
6) To edit the Email subject, type the required text in the field.
7) Click the **Update** button to save your changes.

Setting Measure Data Due Reminder Notification

Use the *Measure Data Due Reminder Notification* page to set when notification needs to be sent out to remind users that measure data is due.

1) To set the data due reminder notification:
2) Click the **General Settings** tab.
3) Select the **Measure Data Due Reminder Notification** link.
4) Click the **[Edit]** link next to the frequency you want to change.
5) Enter the number of days.
6) Click the **Update** button to save your changes.

Managing Default Email Addresses

You can use the *Default Email Addresses* link to configure default Email addresses. You can set a *From* address for emails sent by the system, and a *Do not reply* address.

To add general Email default addresses:

1) Click the **General Settings** tab.
2) Click the **Default Email Addresses** link.
3) Enter the default addresses.
4) Click **Update**.

Setting Stream Ticker Refresh Interval

To set the refresh interval of the Stream Ticker:

1) Click the **General Settings** tab.
2) Select the **Stream Ticker Refresh Interval** link.
3) Click the **[Edit]** link.
4) Enter the *Refresh Interval* in minutes.
5) Click the **Update** button to save your changes.

Report, Listing Page, and Search Settings

In This Section

Managing Max Rows for Reports

Use the *Max Rows For Reports* page to limit the number of rows to display in reports.

To edit the settings:

1) Click the **General Settings** tab.
2) Select the **Max Rows for Reports** link. The *Edit Max Rows for Reports screen* is displayed.
3) Enter the value.
4) Click **Update**

Managing Max Rows for My Work

Use the *Max Rows For My Work* page to limit the number of rows to display on the My Work page.

To edit the settings:

1) Click the **General Settings** tab.
2) Select the **Max Rows for My Work** link. The *Edit Max Rows for My Work screen* is displayed.
3) Enter the value.
4) Click **Update**

Restricting Document Sizes

To restrict document sizes by initiative:

1) Click the **General Settings** tab.
2) Select the **Document Size Restriction** link. You will see a list of the current document sizes allowed for each initiative.
3) Click the **[Edit]** link next to your initiative.
4) Enter a new value. The sizes are in kilobytes. You can leave the field blank if you do not want to restrict the size of the documents.
5) Click **Update** to save your changes.

Configuring Report Attachment Max Size

To restrict attachment size:

1) Click the **General Settings** tab.
2) Select the **Report Attachment Max Size** link.
3) Click the **[Edit]** link next to your initiative.
4) Enter a new value. The sizes are in kilobytes.
5) Click **Update** to save your changes.

Selecting Display Mode For Filter Page Sections

You can set how you want the filter pages to display. You can choose to have the filter section all expanded, or all collapsed, or Keep the filter section as is. If you choose *Keep The Filter Sections As Is*, then some of the filter sections are expanded and some collapsed based on your earlier (7.0) settings. All users in the system will see this change.

To modify the display mode for filter pages:

1) Click the **General Settings** tab.
2) Select the **Display Mode For Filter Page Sections** link.
3) Click the **[Edit]** link.
4) From the pull-down menu select from **Keep The Filter Sections As Is**, **Collapsed All**, or **Expanded All**.
5) Click the **Update** button to save your changes.

Setting Max Cache Size for Listing Pages

The cache size refers to the number of rows, or entities (projects, proposal, or resources) displayed in listing pages.

To select the maximum cache size for listing pages:

1) Click the **General Settings** tab.
2) Select the **Max Cache Size for Listing Pages** link. The *Administration: Max cache size for listing pages* screen is displayed.
3) Click the **Edit** link. The *Edit max cache size for listing pages* screen is displayed.
4) Enter the cache size. The recommended default value is 1000 rows and the maximum is 3000 rows.
5) Click **Update**.

Managing Static Application Settings

Use the *Static Application Settings* page to modify the following settings:

- **Maximum number of rows to show in filter box**

  Enter the maximum number of rows to show in the filter box throughout the application.
- **Maximum number of projects to show in filter box**

Enter the maximum number of projects to show in the Available Projects filter box.

- **Default number of rows per page**

  Enter the default number of rows to display per page on listing pages.
- **Limit maximum number of rows per page to**

  Enter the maximum number of rows to display per page on listing pages.
- **Default working hours per day**

  Enter the default working hours per day.
- **Display string for TBD user**

  Enter a display name for TBD user roles yet to be defined.
- **Maximum social stream events to display**

  Enter the maximum number of social stream events to display on the social stream ticker.
- **Maximum social stream events to display per page**

  Enter the maximum number of social stream events to display per page on the Social Stream listing page.
- **Maximum number of characters in social stream comment**

  Enter the maximum number of characters allowed in the social stream comment box.
- **Maximum number of social stream comments to display**

  Enter the maximum number of social stream comments to display. To view all the comments, users can click the View all comments link.
- **Maximum number of time units for scenario**

  Enter the maximum number of time units to use for scenarios.

To set the static application settings:

1) Click the **General Settings** tab.
2) Click the **Static Application Settings (Max / Min Rows etc.)** link.
3) Enter the values.
4) Click **Update**.

Configuring Integration Settings

Use the *Integration Settings* page to select the maximum number of projects to retrieve when an external application makes API calls.

To set the maximum number of projects to retrieve:

1) Click the **General Settings** tab.
2) Select the **Integration Settings (Max Records to Retrieve in Project Search)** link.
3) Enter the maximum number of projects to retrieve.
4) Click **Update**.

Storyboard Reports

Managing Storyboard Templates

Use the *Manage Storyboard Templates* page to download, add, edit or delete storyboard templates. You can download the default template files and customize it by adding your company logo, changing fonts, or changing the background color. A storyboard template contains a set of style rules that users can apply to their report to format and customize their PowerPoint presentations.

Adding Templates

To upload your updated or new storyboard templates:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Enter a display name for this template.
4) Click **Browse** to find your template.
5) Click **Add**.

Downloading Templates

To download and customize an existing storyboard template:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Click on the **Template File** to download it onto your computer.

Uploading an Edited Templates

You can change the template display name, replace the associated template file, or enable/disable the template. The templates you enable here are available as template options when users create project storyboard reports. The templates are edited in Microsoft PowerPoint.

Note: You cannot edit or disable the default template file.

To upload an edited template:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Select the template by clicking on its Template Display Name.
4) Update the Template Display Name, or click **Browse** to select and upload a new template file, or select the **Enable/Disable** flag to enable or disable the use of this template.
5) Click **Update**.

Deleting Templates

To delete a template:

1) Select the **General Settings** tab.

2) Click the **Storyboard Templates** link.
3) Click the **Delete** link associated with the template you want to delete.
4) Click **Ok** to confirm the deletion.

Adding Storyboard Document Labels

To customize your storyboard document labels:

1) Select the **General Settings** tab.
2) Click the **Storyboard Document Labels** link.
3) Edit the description for each of the labels you want displayed on your storyboard.
4) Click **Update**.

Mobile Error Logs

To view and download mobile error logs:

1) Click the **General Settings** tab.
2) Select the **Mobile Errors** link.
3) Click **Download**.

Finance Management

In This Section

Managing Currencies

EnterpriseTrack allows you to configure your system to work with multiple currencies. A list of required currencies should be specified during initial system configuration. The system administrator can then manage these currencies and make them available for use within projects through the user interface.

In This Section

Creating Currencies

When you create a new currency through the user-interface, you are, in fact adding a currency from the configuration file to the list of currencies available for use within projects.

To create a new currency:

1) Click the **Finance** tab.
2) Select the **Currencies** link. The *Manage Currency* page displays a list of all the existing currencies.
3) Click the **Create a New Currency** button.
4) Select the appropriate currency from the **Currency** pull down menu. The page will refresh to pre-populate the other fields with all the available information about that particular currency.
5) Make the appropriate changes to the pre-populated information. You can change the names the conversion rate as well as the symbol. For some currencies, you may want to enter a multiplier. (For E.g., if we assume 1.00 USD = 5000 ZMK, if the US dollar is your base currency, you may want to enter 5 in the Conversion rate field and 1000 in the multiplier field. This way, users will only need to enter smaller numbers in the conversion rate field and are less likely to make mistakes while entering data)
6) Click **Create**.

Editing and Deleting Currencies

To edit an existing currency:

1) Click the **Finance** tab.
2) Select the **Currencies** link. The *Manage Currency* page displays a list of all the existing currencies.
3) Click the **Edit** link next to the name of the currency you wish to edit.
4) On the **Edit Currency** page, make the required changes. The available fields may vary from currency to currency and determined by the fields defined within the configuration file.
5) Click **Update** to save your changes.
6) Click **Cancel** to leave the page without saving any changes.

Deleting a currency

To delete an existing currency:

1) Click the **Finance** tab.
2) Select the **Currencies** link. The *Manage Currency* page displays a list of all the existing currencies.
3) Click the **Delete** link next to the name of the currency you wish to edit.

4) Click **Ok** in the dialog box to continue with the deletion. Click **Cancel** if you want to retail the currency in your system.

> **Note:** When you delete a currency though the User-Interface, you are not deleting it from the configuration file. You can add this currency to the system by using the ***Creating Currencies*** (on page 82) link.

Managing Conversion Rates

To set monthly conversion rates for currencies that have been created in your system:

1) Click the **Finance** tab.
2) Click the **Conversion Rates** link.
3) Select the appropriate currency from the pull-down menu.
4) Select the year for which the conversion rates are being entered.
5) Enter the correct rates for each month. To copy the value for a particular month to all the subsequent months, you can click the copy forward button.
6) Click **Update** to save you changes.
7) Click **Done** to leave the page without saving your changes.

Managing Finance Templates

In This Section

Working with Finance Templates

You can use the Finance Templates section of the Administration module to rename, enable and disable finance categories, and change the multiplication factors for each field.

The default finance template is installed when the system is first deployed. You can modify this template using the Finance Templates section. You can also create a new finance template which can then be made available to the Financial Administrators and other users.

Editing the Finance Template

To edit the general information:

1) Select the **Finance** tab.
2) Click the **Finance Templates** link.
3) Click the **Edit** link in the *Action* column of the appropriate template. The following fields can be modified:

General Details

Name: The name by which this template will be referred to in the user interface.

E.g. Global Finance Template

Description: Provide greater detail about the template.

Finance Data Entry Fields

Default Finance Edit Mode: The default mode for tracking financial data. You can choose from Monthly, Yearly or Aggregate. If you choose the Yearly mode, and you are tracking finances over 5 years, the user will see five columns (with some potential spill-over based on the specific dates). In the Aggregate mode, users will enter a lump-sum amount.

Allowed Finance Edit Modes: These define the other allowed edit modes. Select from Monthly, Yearly and Aggregate. The default edit mode must be selected. You can also choose to display additional tabs. These additional tabs are displayed only for visual reporting and will be in read-only mode**.**

Important

If you choose to allow users to enter an aggregate value for the finances, you must specify the Finance Distribution Months (i.e., the entered lump sum value is to be distributed over X months). You can also set a Finance Distribution Repeat Frequency.

The system will allow you to go from the Monthly mode to a Yearly and/or Aggregate modes. You cannot go from a Yearly mode to the Aggregate mode.

Financial Fields

These financial fields are displayed on the Finance Summary page.

Net Present Value (NPV): measures the excess or shortfall of cash flows, in present value (PV) terms, once financing charges are met. By definition, NPV = Present value of net cash flows.

Internal rate of Return (IRR): is the return rate which can be earned on the invested capital, i.e. the yield on the investment. It is defined as any discount rate that results in a net present value of zero of a series of cash flows.

Return on Investment (ROI): is the ratio of money gained or lost on an investment relative to the amount of money invested

Note: Enabling these fields will make them visible to users on the Finance Summary page for each project.

Finance tracking Details

Finance Tracking Months: The number of months for which financial data is to be tracked.

Default Finance Tracking Start Date: The date from which financial tracking should begin. E.g. the Project Start Date or the Planned Project Close Date.

Note: These settings are only defaults and can be changed at the project level.

Enable Finance Tracking Sub-window: Setting this to Yes will allow users to enter financial information within a set time frame within the tracking months. The sub-window can defined only if financial data is being entered in the Monthly mode. A date range and start date for the sub-window must also be defined.

Finance Table - Column Header Labels

Realized Financial Data section: The name of the data field that displays the realized financial details.

UnRealized Financial Data section - Open Projects: The name of the data field that displays the as yet unrealized financial details for projects that are still open. E.g. Forecast

UnRealized Financial Data section - Closed Projects: The name of the data field that displays the unrealized financial details for projects that have been closed E.g. Actual data

Excel Import/Export

Import Finances from MS Excel: Default value for all projects.

View Excel Template (name_of_file.xls)

Select Excel Template File

Excel template file in sync?: This field refers to the Microsoft Excel file associated with the finance template within EnterpriseTrack. When you change the details of the finance template, you should modify the Excel file, upload it to this page and then set this field to **Yes**.

Note: If the Excel file is not in sync, users will not be able to import and export financial information from the Finances section within specific projects.

Copying a Finance Template

EnterpriseTrack allows you to copy an existing finance template and then make changes to it. This can reduce the amount of time spent on creating new templates.

1) Click the **Finance** tab.
2) Click the **Finance Templates** link.
3) To copy a finance template, click the **Copy** link in the *Action* column of the appropriate template.
4) On the *Copy Finance Template* page enter a new name for the template in the **Copy To** field.
5) Select the initiative with which you want to associate this template.
6) Click the **Copy** button to make a copy.

Viewing and Editing Finance Categories within a Template

Viewing Finance Categories

To view the details of the finance template:

1) Click the **Finance** tab.
2) Select the **Finance Templates** link.
3) Click the **View details** link in the **Action** column. You will see each finance category and all its sub categories that are displayed on the Finance pages in the User module.

Editing Finance Categories

The **Finance Categories** page displays each finance category and all its sub categories.

1) Locate the finance category you want to modify and click the **Edit** link in the **Action** column.
2) The following fields can be edited:
   - **Display Name**: The name that is displayed in the user interface.
   - **Visible?**: Select whether this category should be available for use through the user interface.
   - **Parent Category**: The parent category for this category.
   - **Sort ID**: The sort order number. This number decides where this category is displayed under the parent category.
   - **Multiplication Factor Type**: You can choose from Static or Expression.
   - **Multiplication Factor Value**: The multiplication factor applied to the category value when data is rolled-up to obtain the category totals.

     If you chose the multiplication factor type to be static, this value should be a number, typically between 0 and 1.0. If you chose the type to be an expression, the value should be an expression in terms of the configured Finance Constants for your system. E.g. cost_of_capital, 1- cost_of_capital.
   - **Element Type**: The type of element. By default, this is set to Currency. You can also use this field to indicate non-currency items, for example: Employee Count or Computers.
3) Click the **Update** button to save your changes.

Managing Finance Approval Templates

In This Section

Working with Finance Approval Templates

Finance approval templates can be used to dictate the finance approval workflow for projects. Finance Approval Templates allow you to configure the approval workflow with greater flexibility.

There can be multiple financial approval workflows associated with an initiative. If there is only one approval workflow template for an initiative, all projects within that initiative will use that workflow by default. If more than one approval workflow template exists, users will see a Finance Approval Workflow Template pull-down menu when they create a project.

Creating a New Finance Approval Template

To create a new finance approval template:

1) Click the **Finance** tab.
2) Select the **Finance Approval Templates** link. You will see a list of the available approval templates.
3) Click the **Create New Finance Approval Template** button.
4) In systems with multiple initiatives, you must select the initiative with which the template is to be associated.
5) Enter a name and description for the template.
6) Set the **Sequential** flag to **Yes** to make the application enforce sequential approvals.
7) If the Enforcement Status is set to **Enforce required finance validations on project close** the application will not allow the project manager to close the project until all the required finance approvals are granted.

Viewing and Editing Finance Approval Definitions

Viewing Finance Approval Template definitions

To view the details of a finance approval template:

1) Click the **Finance** tab.
2) Select the **Finance Approval Templates** link. You will see a list of the available approval templates.
3) Click the **View details** link. From the Finance approval definitions page you can add new steps, edit or delete existing steps.

Editing Finance Approval Template Definitions

1) On the Finance approval definitions page click the **Edit** to edit details of a finance approval step. You can edit the name and description of the approval step.
2) The **Request Optional** setting controls how the Request and Approve buttons are displayed. If the request is set to optional, approvers can approve without having to wait for a request for approval. In this case both **Request** and **Approve** buttons are displayed in the project finance validation screen.
3) The **Approval Optional** setting controls how the Request and Approve buttons are displayed. If a particular approval step is required and the approval has to be done is a particular sequence then this approval needs to be granted before the **Request** and **Approves** button for subsequent steps are displayed.

4) Select the roles that can perform Request, Approve and Undo actions for the particular approval step. Multiple roles can be selected by holding the Control key while clicking the name of the role.

Managing 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.

> **Note:** These setting are defaults and can be modified from the Financial Settings page for each project.

Managing Labor Expense Types

In This Section

Creating Labor Expense Types

You can create multiple Labor Expense Types (LETs) based on your business needs. The LETs you create are associated with a finance expense category (Capital Expense or Operational Expense). Project Managers can use these LETs to label project activities. For example, you can create an LET called *Training*, and associate it with the finance expense category *Operational Expense*. Project Managers can mark activities that relate to training expenses under the LET *Training*.

To create Labor Expense Types (LETs):

1) Click the **Finance** tab.
2) Click the **Labor Expense Types** link. The *Labor Expense Type List* screen is displayed.
3) Click the **Create a New Expense Type** button. The *Create Labor Expense Type* screen is displayed.
4) Enter a name for the LET
5) Select an expense category from the drop-down list.
6) Click **Add** to add a new LET.

Editing Labor Expense Types

You can edit Labor Expense Types (LETs) by changing its status and its association with an expense category.

To edit Labor Expense Types (LETs):

1) Click the **Finance** tab.
2) Click the **Labor Expense Types** link. The *Labor Expense Type List* screen is displayed.
3) From the **Actions** menu, select the **Edit** link next to the LET you want to edit. The *Edit Labor Expense Type* screen is displayed.
4) You can change the LET and the expense category from the drop-down list.
5) Choose the status of the LET. You can select **Active**, **Invalid**, or **Archived**.
6) Click **Update** to save your changes.

> **Note:** *You cannot modify an LET that is currently in use. To deactivate an LET, you have to change the status to Invalid.*

Managing Activity Labor Cost Capitalization Settings

Enabling Activity Labor Cost Capitalization allows you to select a Labor Expense Type (LET) attribute for each activity. Activity labor costs are properly rolled up into finance under appropriate expense category (Capital Expense, or Operational Expense) based on its LET.

For each initiative, you can choose to enable or disable Activity Labor Cost Capitalization, and select if you require Project Managers to enter the LET for each activity. You can also set a default LET.

To manage the Activity Labor Cost Capitalization Settings:

1) Click the **Finance** tab.
2) Select the **Activity Labor Cost Capitalization Settings** link.
3) Click the **[Edit]** link next to the initiative you want to modify.
4) Select if you want to enable labor cost capitalization.
5) Select if you require Project Managers to enter the LET for each activity.
6) Select a default LET. Project Managers can override the default values only if *Labor Cost Capitalization* is enabled.
7) Click **Update** to save your changes.

Updating Global Finance Locks and Constants

The default financial settings for your system are created when the system is first configured. Within most systems, you can modify the financial lock month, create a global lock of all financial data including projections (E.g. maybe during an audit), and view the month in which the fiscal year begins. You can also modify any multiplication factors that have been configured such as the cost of capital, the weighted average cost of capital, etc.

To update the global financial setting of your system:

1) Click the **Finance** tab.
2) Select the **Global Finance Locks & Constants** link.
3) Change the values in the relevant fields. If you choose to change the lock month, for example, all financial data within the system for all periods up to the lock month will be displayed only in read-only mode. No user will be able to make changes to any values within that period. If you change the Financial Global Lock to **Yes**, all data in all months will be displayed only in read-only mode.
4) Click **Update**.

Managing Finance Lock Enforcement Settings

To configure the finance lock settings:

1) Click the **Finances** tab.
2) Select **Finance Lock Enforcement Settings** link.
3) Select an initiative and click the **[Edit]** link next to it.
4) Select **Strict** or **Limited**.
5) Click the **Update** button to save you changes.

Important!

Oracle recommends not changing the enforcement mode on a live production system. When the mode is changed, it takes effect only for new projects created from that point of time. Old projects continue in the previous enforcement mode and cannot be changed.

Notes:

- In the Limited mode, the finance lock/close period enforcement is guaranteed only when roadmap activities are used with Actual Effort Type (AET) set to Effort from Finances. Finance lock enforcement is not guaranteed when used with any other AET.

- If finance lock is set to Strict, you cannot change the currency exchange rate or labor rates for locked/closed financial periods. For roadmap activities, the Actual Effort Type (AET) is restricted to Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances.

The following table lists the supported options for both the Strict and Limited modes.

Supported Options	Strict	Limited
Enforcement	Always Guaranteed	Not Guaranteed. Guaranteed only when used with AET set to Effort from Finances, finances are edited in the monthly mode, and resource rates are explicitly overridden

		at the project level. Enforcement is through manual process.
Resource labor rate, role, labor rate changes	Not allowed if it can affect a finance lock/close period in any project.	System does not check for violation and finance lock/close period integrity is not protected.
Currency conversion rate (exchange rate) changes	Not allowed if it can affect a finance lock/close period in any project.	System does not check for violation and finance lock/close period integrity is not protected.
Supported AETs	Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances	All AET options
Unsupported AETs	Duration& Resource % availability, Effort at Activity Level- Equal % Distribution, Effort at Activity Level- Unequal % Distribution, and Effort at Resource Level (Summary)	None
Editing finances in yearly or aggregate (annualized) mode	Not allowed	Allowed. Finance lock may not be protected.

Data Import and Export

In This Section

Downloading Templates

Importing data into EnterpriseTrack is a multi-step process. EnterpriseTrack comes with pre-defined . csv templates which you must use to format the data to be imported. The system will validate the data before it is imported into the system, and check for duplicate records.

To download the templates:

1) Click the **Data Import & Export** tab.
2) Select the **Download Templates** link.
3) Depending on the primary object (Ideas, Project or User) for which you want to import data, click on the appropriate **[Download]** link.
4) When the file download dialog box opens up, choose the **Save** option and save the file to your desktop.
5) Enter the data to be uploaded in the. csv file.

Once you have completed the template, you are ready to import data into EnterpriseTrack.

> **Note**: The .csv files needs to be encoded as UTF8, only if the data in file is not in ASCII format. UTF8 file formats are generally not compatible with MS Excel.

Modifying Metadata for File Upload

To modify the metadata details:

1) Click the **Data Import & Export** tab.
2) Select the **Modify Metadata for File Upload** link.
3) Choose the type of encoding, delimiter and decimal symbol.
4) Select if you want to trim trailing and leading spaces.
5) Enter the path delimiter and click the **Update** button to modify the metadata.

Importing Data

Importing data into EnterpriseTrack is a multi-step process. EnterpriseTrack comes with pre-defined MS Excel templates which you must use to format the data to be imported. You must download the template and enter the data into the template before it can be imported into EnterpriseTrack. Once you have completed the templates, you can upload it to the system, validate the data and then import it into EnterpriseTrack.

To begin importing data:

1) Click the **Data Import & Export** tab.
2) Select the **Import Data** link.
3) Depending on the primary object for which you are importing data, select from Import Ideas, Import Project or Import Users.

> **Note:** If you are importing projects, there are different templates for the different sub-sections of the project. You can upload data for each section independent of each other.

4) On the **Import (Object)** page, click the **[Upload]** link. Browse to the completed . csv file and click the **Upload** button. The system will tell you how many records were successfully uploaded.
5) Once the file has been uploaded, click the **Validate Data** button. On the Validate Data page, you can specify whether you want to allow changes to be made to the existing data or not. Click the **Validate Data** button. The system will work though the records and display a count of the records that have errors. All errors have to be fixed before the data can be imported.
6) Click the **Delete Files** button to delete an existing file and import a new one. Once data has been validated, you will have to delete the file before uploading a new one (even if you are only fixing errors).
7) Click the **Import Data** button to import the data. On the *Import Data* page, you can specify whether you want to allow changes to be made to the existing data or not. Click the **Import Data** button.
8) The imported objects should be visible in the appropriate listing pages.

Viewing Error Records

1) Click the **[View Error Records]** link to view a list of the records with errors.
2) A dialog box will ask you if you want to open a file. This file will give you the name of the record as well as the column that has the erroneous data. E.g. If the contact information has not been formatted properly for a particular idea, the Error Message will say *Contact*.

Unlocking a Data Import Process

Use the *Unlock Data Import Process* page to unlock an import process that is locked. An import process can get locked if you navigated to another screen, closed the window, the session timed out, or the connection failed during an import.

> **Notes**:
>
> - The *Unlock Import Data Process* link is visible only when a data import process is locked.
> - Only the Administrator that initiated the import process and sys_admin can unlock it.

To unlock a data import process:

1) Click the **Data Import & Export** tab.
2) Select the **Unlock Import Data Process** link.
3) Click **Yes** to unlock the process.

Exporting Data

To export data:

1) Click the **Data Import & Export** tab.
2) Click the **Export Data** link.
3) Select the **[Export Data]** link from the *Action* column associated with the primary object (Idea, Project, Resource, etc.) you want to export.
4) Select if you want to open or save the file. Choose the location and click **OK**.

Downloading Data Integration Templates

You to download two types of templates in real-time for a project entity, based on your EnterpriseTrack account configuration. They are:

- Templates for the CRUD functions.
- Templates for request data for the CRUD functions.

To download the CRUD templates:

1) Click the **Data Import & Export** tab.
2) Select the **Download Data Integration Templates** link.
3) Select values for the following fields from the corresponding drop-down list:
    - **Initiative**: Select the initiative for the project entity.
    - **Languages**: Select the language. Displays English by default.
    - **Date Format**: Select the date format.
    - **Type**: Select the type of template that is to be downloaded. Choices include:
        - **Download Template**: Generates CRUD templates in XML and JSON formats.
        - **Download Request for Template**: Generates a request template in XML and JSON formats for each CRUD function. These request templates can be used to specify input data in the relevant CRUD function.
4) Click the **Download** button for the corresponding function.

    If you chose **Download Template**, a create_request, update_request, search_request and delete_request file will be generated.

    If you chose **Download Request for Template**, the following files will be generated: create_request_template, update_request_template, search_request_template and delete_request_template. You can use these files to specify input data for the relevant CRUD function.

Background Jobs

In This Section

Viewing Rate Change Status

The *Rate Change Submission Status* page displays the status of all rate change requests in the last 7 days.

To view the submission status of all rate change requests in the last 7 days:

1) Click the **Background Jobs** tab.
2) Select the **View Rate Change Submission Status** link.

Using Activity Labor Cost Capitalization

The Activity Labor Cost Capitalization feature allows you to add Labor Expense Type (LET) attributes to project activities. These LETs are mapped to finance expense categories like (Capital Expense or Operational Expense). Activity labor cost is properly rolled up into finance under appropriate expense category based on its LET.

Important!

Follow the configuration steps carefully to ensure proper labor cost roll-up from activities to finance. Please contact Oracle Customer Support if you have any questions.
Set up the Finance Template to include all the sub-categories like standard effort, overtime effort, timesheet effort and timesheet overtime effort even if you are not currently using these categories. Labor cost data may not roll-up properly if the template is not set up as per the recommendations.

To setup and configure Activity Labor Cost Capitalization:

1) Modify the Finance Template.
    1. Ensure that the Finance Template has a separate category for **Capital Expense** and **Operational Expense**.
    2. The **Capital** parent category should include a sub-category **Resource Capital Expense** of type *Capital Expense-Resource Activity based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
    3. The **Expense** parent category should include a **Resource Operation Expense** sub-category of type *Operational Expense-Resource Activity based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
    4. The **Expense** parent category should include a **Resource Neutral Expense** sub-category of type *Resource based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
    5. Set the field *Resource Computation Enabled* to **Yes**.
2) Create Labor Expense Types (LETs) based on your company's business needs. See topic ***Creating Labor Expense Types*** (on page 88).

3) Set a default LET in the activity template. For more information, see topic ***Creating Activity Templates*** (on page 41).
4) Manage the Activity Labor Cost Capitalization Settings. For more information, see topic ***Managing Activity Labor Cost Capitalization Settings*** (on page 89).
   1. Select **Yes** for the field *Labor Cost Capitalization Enabled*.
   2. Select **Yes** for the field *Is Labor Expense Type required for Activities*. Oracle recommends that you mark **Yes** for this field if you have enabled Labor Cost Capitalization.
5) Enable Project Level Efforts.
   1. From the **Deployment Options** tab, select **Feature Settings**.
   2. Select your project initiative.
   3. Click the Enable/Disable check box next to **Display Project Level Efforts**.
6) Edit project finance settings. Ensure that the Project Manager has enabled these settings.
   1. The *Finance Tracking Start Date* should be the same date as the project start date. The actuals will not flow if they are not the same.
   2. Select **Yes** for *Resource Computation Enabled*.

For More Information

In This Section

Where to Get Documentation

Complete documentation libraries for EnterpriseTrack releases are available on the Oracle Technology Network (OTN) at:

http://www.oracle.com/technetwork/documentation/default-1956119.html

From this location you can either view libraries online or download them to have local copies. We recommend viewing them from OTN to ensure you always access the latest versions, including critical corrections and enhancements.

EnterpriseTrack is configured to access its help system directly on OTN. However, a downloadable version of the help system is also available on OTN if you need to download, deploy, and access a local copy.

The documentation assumes a standard setup of the product, with full access rights to all features and functions.

The following table describes the core documents available for EnterpriseTrack and lists the recommended readers by role.

Title	Description
EnterpriseTrack User Help	Describes how to work with EnterpriseTrack and provides information to assist users with using EnterpriseTrack features. All users should read this Help.
EnterpriseTrack Administrator's Help	Describes how to work with EnterpriseTrack Administrator's console to manage your deployment and change various aspects of the application. EnterpriseTrack administrator should read this Help.
EnterpriseTrack User Guide	Guides users on how to use the EnterpriseTrack application. All users should read this guide.
EnterpriseTrack Administrator's Guide	Provides detailed information on using the EnterpriseTrack Administrator's console. EnterpriseTrack administrator should read this guide.
EnterpriseTrack Dashboards User's Guide	Provides detailed instruction on using the EnterpriseTrack Dashboards modules to view and generate dashboards. All users should read this guide.
EnterpriseTrack Reports User's Guide	Provides detailed instruction on using the EnterpriseTrack Reports modules to generate standard reports, ad-hoc reports and user-defined reports. All users should read this guide.
EnterpriseTrack Quick Reference Guide	Provides a quick introduction to common EnterpriseTrack tasks. All users should read this guide.
EnterpriseTrack Installation Guide	Provides information on how to install and configure EnterpriseTrack. EnterpriseTrack administrator, network administrator and database administrator should read this guide.
EnterpriseTrack MSP Integration Guide	Provides an overview of MS Project integration for EnterpriseTrack. EnterpriseTrack users who will perform MS Project integration should read this guide.
EnterpriseTrack API Integration Guide	Provides information that allows customers to customize existing third-party integration. Developers interested in customization and existing third-party providers that integrate with EnterpriseTrack should read this book.

Title	Description
EnterpriseTrack Upgrade Guide	Provides a sequence of procedures that must be completed to upgrade to a new version of EnterpriseTrack. EnterpriseTrack administrator and database administrator should read this guide.
EnterpriseTrack Architecture Data Sheet	Provides the server system requirements and the deployment configuration options for EnterpriseTrack.
EnterpriseTrack Tested Configurations	Lists the configurations that have been tested and verified to work with EnterpriseTrack. EnterpriseTrack administrator, network administrator, and database administrator should read this guide.
EnterpriseTrack Cumulative Features Overview Tool	Provides an overview of features and enhancements included in the Oracle EnterpriseTrack product. It is intended solely to help you assess the business benefits of upgrading. All users should read this guide.
EnterpriseTrack Security Guide	Provides guidelines on how to plan your security strategy for EnterpriseTrack. All users, EnterpriseTrack administrators, network administrators and database administrators should read this guide.

Distributing Information to the Team

You can copy the online documentation to a network drive for access by project participants. Each team member can then view or print those portions that specifically relate to his or her role in the organization.

Throughout this documentation, the Security Guidance icon helps you to quickly identify security-related content to consider during the installation and configuration process.

Where to Get Training

To access comprehensive training for all Primavera products, go to:

http://education.oracle.com

Oracle Learning Library

The Oracle Learning Library (OLL) provides online learning content covering Primavera products. Content includes videos, tutorials, articles, demos, step-by-step instructions to accomplish specific tasks, and self-paced interactive learning modules.

To access the learning library's Primavera content, go to:

http://www.oracle.com/oll/primavera

Where to Get Support

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/us/support/contact-068555.html or visit http://www.oracle.com/us/corporate/accessibility/support/index.html if you are hearing impaired.

Using Primavera's Support Resource Centers

Primavera’s Support Resource Center provides links to important support and product information. Primavera's Product Information Centers (PICs) organize documents found on My Oracle Support (MOS), providing quick access to product and version specific information such as important knowledge documents, Release Value Propositions, and Oracle University training. PICs also offer documentation on Lifetime Management, from planning to installs, upgrades, and maintenance.

Visit https://support.oracle.com/epmos/faces/DocumentDisplay?id=1486951.1 to access links to all of the current PICs.

PICs also provide access to:

- **Communities** are moderated by Oracle providing a place for collaboration among industry peers to share best practices.
- **News** from our development and strategy groups.
- **Education** contains a list of available Primavera product trainings through Oracle University. The Oracle Advisor Webcast program brings interactive expertise straight to the desktop using Oracle Web Conferencing technology. This capability brings you and Oracle experts together to access information about support services, products, technologies, best practices, and more.

For more information about working with Support, visit https://support.oracle.com/epmos/faces/DocumentDisplay?id=888813.2.

Legal Notices

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