

Oracle Instantis EnterpriseTrack Quick Reference Guide for Release 9.0

Create a Proposal/Charter

- From the Top Navigation Bar, click **Create** →  **Proposals/Charters**.
- Enter all the required fields and click **Save** to save the project Proposal/Charter.

Selecting the Initial Project Team

- To add a new role, click the **Add Role** button. To edit a role click the  **Edit** button.
- To delete a role click the  **Delete** button.
- Click  **Check Availability** to view resource availability.

Create a Quick Project

- From the Top Navigation Bar, click **Create** →  **Projects**.
- Enter all the required field in the Create Quick Project page and click **Save** to create the project.

Create Project from Proposal

An approved proposal will have an **Accept Proposal & Create Project** button on the Proposal Details page. Click this button to create a project.

Significant Sections in Proposals and Projects

Basics

- Select a Project Type, Calendar, and a Roadmap for a project. Project types are used for categorizing the project and reporting. A Roadmap defines a list of unique sets of activities.
- Select an initial team. The available team members are determined by the initiative

you choose and by the roles the users are allowed to fulfill within the system.

Finances

Enter the monthly savings and costs for the project.

Dates

- Enter the **Planned Start Date** or the **Project Planned Closed Date**.

Changes to Phase Durations

You can modify the duration (in days) of each phase in this section.

Project Workflow

- To close a stage, from the **WorkFlow** menu select **Close Phase**. Click the **Close Phase** button and **Save**.
- To put a project on hold, from the **WorkFlow** menu select **Hold Project**. Change the Status to **On Hold** and click **Save**.
- To cancel a project, from the **WorkFlow** menu select **Cancel Project**. Change the Status to **Canceled** and click **Save**.
- To change a Roadmap, from the **WorkFlow** menu select **Change Project Schedule**. Select a new project plan and click on the **Save** button.

Viewing Field History

- To view field change history for proposals/charters, navigate to **Proposal/Charter#** →  **Field Change History**.

- To view field change history for projects, navigate to **Project#** → **Field Change History**.

Toolbars

- You can view or hide the 4 toolbars (Print-Data, Editing, Views, and Row-Action Menu) within the *Roadmap* page. To view the toolbars, from the **View** menu select **Toolbars** and select the checkbox associated with each toolbar. Deselect the checkbox to hide the toolbars.

Sorting and Filtering

- To sort columns on all listing pages, select the column and click on the up and down arrows next to the column name.
- To filter, first select the filter row by selecting **View → Filter Row**. Click on the box below the column name to view the various filter options. Select a filter option and type the word in the filter box.

Selecting, Resizing, and Arranging Columns

- To select columns on all the listing pages, click the **Select Columns**  icon or select **Columns** from the **View** menu. Columns that could degrade performance are marked with the  icon.
- To resize columns click on the edge of a column and resize.
- To rearrange columns, drag and drop the column to a new location on the page.
- To save the column order, selection and size, click on the  icon or select **(Page Menu) View → Save View Settings**. On subsequent logins, your saved settings are used to display the page.

Saved Searches and Advanced Search

The Listing page views display the results returned by a search.

- To view the current search setting, select **View Current Search Criteria** from the **Manage** pull-down menu.
- To create a new search, from the **Manage** pull-down menu select **Create** to add a new search, Assign a filter name and description and also choose if you want to select this search as a default search. Click the **Save Search** button.
- To edit a search, select a search from the **Saved Search: View** drop down menu. Make changes and click on the **Save Search** button.
- To delete a search, select a search and click on the **Delete Search** button.
- To reset filters to default values, click the **Reset Filter** button.

Using the Group By Filter Functionality

To use the Group By filter functionality to group projects by selected columns, go to the [Projects](#) page. Click the  button, or select **(Page Menu) Data → Group By**. From the drop-down menu, select a column for grouping. To filter based on multiple filter criteria, select a project column and drag it next to your first filter criteria. To remove grouping criteria, select the column and drag away.

Using the Pivot Functionality

To use the Pivot functionality to summarize project data using grouping fields, go to the [Projects](#) page. Click the  button, or select **(Page Menu) Data → Pivot**. From the pivot table options, select the row, columns, and data for your pivot table by dragging and dropping project column field names. To remove a field, select and drag away.

View Phases (or Gates)

The activities of a particular project are determined by the roadmap chosen for the project. Each phase has a fixed duration and is made up of activities.

- To view a snapshot of the phase details navigate to the **Roadmap** page by clicking the  **Roadmap** link in the Left Navigation bar, or by selecting **Project # → Go To →  Roadmap** from the Top Navigation bar, within a particular project.
- Locate the activity you wish to view. You can use the  and the  buttons next to the phase name to collapse and expand the activities displayed on the page.
- Click the name of the activity and from the **Actions** menu select **View Details**.
- The **Summary** tab gives you a snapshot of the status and the dates associated with the activity. You can complete an activity from the Summary or the Basics tab in the properties pane.

Roadmap List Pane Controls

	Expand the tree.
	Close (or collapse) all activities.
	Add a child node (E.g. task).
	Add a peer node (E.g. Tollgate).
	Select from a sub-menu.
	Edit an activity.
	Delete an activity.
	Copy a selected node. Leaf nodes can be copied. If the button is not enabled, make sure you can see the properties of the leaf node (e.g. Task, not Gate) in the

properties pane.

	Cut a selected node. If the button is not enabled, make sure you can see the properties of the leaf node (e.g. Task, not Gate) in the properties pane.
	View documents and tools associated with an activity.
	Paste the selected activity.
	Paste Special.
	Copy dates from Plan to Baseline.
	Edit all activities on the Roadmap.
	Save your settings.
	Reset your settings.
	Print the Roadmap grid. Pop ups must be disabled.
	Export the Roadmap grid to a .CSV file.
	Personalize the grid by choosing the columns you want displayed on the Roadmap page.
	Set the sort order for the items displayed on the page.
	Display or hide grid lines on the page.

Using Keyboard Shortcuts

- Insert:** To add a peer activity. You can do this only if the activity type default is set.

- Ctrl + Insert :** To add a child activity. You can do this only if the activity type default is set.
- ↑ (Up arrow):** To move up a row.
- ↓ (Down arrow):** To move down a row.
- Page Up:** Move to the top of the page.
- Page Down:** Move to the bottom of the page.
- Home:** Go to the first activity on the page.
- End:** Go to the last activity on the page.

Project Plan (Roadmap) Views

- To access the Documents view, go to **(Project Plan Page Menu) View → Roadmap → Documents**.
- To access the Assignment View, go to **(Project Plan Page Menu) View → Assignment**.
- To access the Gantt view, go to **(Project Plan Page Menu) View → Gantt**.
- To access the Roadmap view, go to **(Project Plan Page Menu) View → Roadmap**.

Working with Gantt View

- To view the project Gantt chart, go to **(Project Plan Page Menu) View → Gantt**.
- Click the  button to display the colors that are used on the Gantt bar.
- Use the **Timescale** menu, or right click on the title bar to view projects in different timescales.
- Use the **Show Critical Path** check box to view activities that are on the critical path.
- Use the **Actions** menu to add documents, dependencies, view task details, create activities and change status.
- To edit the Gantt view, go to **Manage Roadmap → Edit Gantt**. The rows you can edit are in pink.
- To change dates/duration view, drag and move the bars associated with an activity

(right side—to change end date; left side—to change start date).

- To change % complete, right click on the bar and select **Update % Complete here**, or **Enter % Complete**.
- To add dependencies, click on the bar associated with an activity and drag vertically down to the next activity. Blue line displays the link.

Activity Display Mode

From the **View** menu, select **Activity Display Mode** and select **Main Page**, **Split Page**, or **Popup Page** to choose how you want to view the activity details.

Adding Project Activities

- Navigate to the Project Roadmap page by clicking the **Roadmap** link on the Left Navigation bar, or by selecting **Project # → Go To → Roadmap** within a particular project.
- To add a child activity, go to **Actions → New→Child Activity** and select the type of child activity, or click the  button and select the type of activity.
- To add a peer activity, go to **Actions → New →Peer Activity** and select the type of peer activity, or click the  button and select the type of activity.

Edit an Activity

- Navigate to the Project Roadmap page by clicking the **Roadmap** link on the Left Navigation bar, or by selecting **Project # → Go To → Roadmap** within a particular project.
- Click on an activity to put in the edit mode. The fields you can edit are highlighted in pink.

- Click on the **Calendar** icon to add start and end dates. Assign dependencies by typing the task number in the *Predecessor* column. Click on the  button to assign resources and add resources to the project team. You can also filter based on availability by clicking the **Filter**  button.
- Click on the  button to assign approvers.
- Enter the Labor Expense Type (LET).
- Click on  **Edit Activity** button to edit activity details in the dialog.

Edit Activity Details

- Navigate to the Roadmap by selecting **Project # → Go To → Roadmap** within a particular project.
- Locate the activity you want to edit and click on the button.
- Select the tab you want to edit.
- Make the necessary changes and click the **Save**  button.

Group Editing

- Navigate to the Project Roadmap page.
- Select **(Page Menu) View → Edit All**.
- **Assigning Resources, Approvers, and Assignment Types:** You can select the **Auto Assign** check box next to *Resources* or *Approvers* to automatically select from the list of preferred resources or approvers. You can also select the assignment types.
- **Entering Dates:** To enter dates, click on the calendar icon and select a date for the Plan Start, Plan Completion, Actual Start and Actual Completion dates.
- **Completing Tasks:** To complete all tasks select the **Open, Not Applicable** or **Completed** check box from the *Mark all Items* column.

Working with Efforts / Dates

To view and edit efforts/dates associated with an activity, go to **Project# → Go To → Roadmap**. Select the activity and from the **Actions** menu select **View Details**. Select the **Efforts/Dates** tab to view the efforts and dates associated with this activity. To edit, from the **Actions** menu select **Edit → Efforts/Dates**. Make the necessary changes and click the **Save**  button.

Working with Resource Effort Distribution

To view and plan the effort for each resource associated with a project activity, go to **Project# → Go To →Roadmap**. Select the activity and from the and from the **Actions** menu select **View Details**. Select the **Resources** tab. To edit, from the **Actions** menu select **Edit → Resources**. Make the necessary changes and click the **Save**  button.

Adding Project Documents

You can view and add project documents from the **Documents** tab on the project Roadmap page.

- To view documents, select an activity and from the *Actions* menu select **Actions → Documents → View All**.
- To add a document, select an activity and from the *Actions* menu select **Actions → Documents → Upload**.

Adding Project Dependencies

You can view and add the inter and intra project dependencies from the **Dependencies** tab (**Actions → Go To → Dependencies**) on the project Roadmap page.

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

entering the number of delta days or select Percentage Completion by Date Range.

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

Complete an Activity

- Navigate to the Roadmap page within a particular project.
- Using the Basics tab:** Select the activity and from the **Actions** menu select **Go To → View Details**. Select the **Basics** tab. On the *Status* field, select the radio-button next to **Completed**. Click the **Save**  button to save your changes.
- Using the Summary Tab:** Select the activity and from the **Actions** menu select **Go To → View Details**. Select the **Summary** tab. Click on the links under the **Actions** column to complete the missing items, and save your changes.
- From the Roadmap grid:** Click to select an activity and put it in the edit mode. The row is highlighted in pink. Click the radio button next to the Status field and select **Complete**.

Adding Non-WBS Activities

- To add non-WBS activities to your roadmap, navigate to the non-WBS page (Issues, Scope, etc.) by selecting it on the Left navigation bar or by selecting **Project # → Create → non-WBS activities (Issues, Scope, etc.)**.
- Click the  button to add a new activity.
- To move a non-WBS activity to be included as an activity on the project roadmap go to **Project → Roadmap**. Select the activity and

click the **Copy Row** icon. Click the **Paste Special** button. Select the level where you want to add the activity and click the Paste button.

Adding Project Risks

- To add project risks, select **Project # → Go To → Risks**.

Adding Project Issues

- To add project issues, select **Project # → Go To → Issues**.

Strategies and Alignments

You can specify the strategy with which a project is aligned at the Proposal stage. A project may contribute to one or more strategies.

- To add a strategy, click the **Add Strategy** link in the Strategic Alignment page.
- The strategy tree can be expanded by clicking the [+] next to the strategy categories.
- Select the strategy you wish to associate with the proposal or project and click the **Add** button.
Strategies cannot be specified while a Quick Project is created. You can go back and edit the project to specify the strategies.

Export Project Data to MS PowerPoint

Install the plug-in

The Plug in can be installed from the Project Import Export page. This has to be done only once.

Exporting project data

- On the Export Project Data page, locate the **Project Data File** link.
- Right click on the link and select **Save Target As** from the menu.
- Save the file to a directory.

- Launch PowerPoint on your machine. You should have installed the Oracle Instantis EnterpriseTrack plug-in for MS PowerPoint.
- In PowerPoint, select the **Import from EnterpriseTrack** option from the **Tools → Oracle Instantis EnterpriseTrack** menu.
- A dialog box will ask you to locate the file to be imported.
- Browse to your template file and import it.

Working with Resource Allocation Requests

You can request resources for the entire project, or you can select the duration, and plan the effort. The resource allocation request is then routed for approval as some roles may require approval before staffing. The status of all resource allocation requests are displayed on the Project Resource page under **Resource Plan**.

- To create a resource allocation request, click the **Resources** link on the Left Navigation bar, or select **Project # → Go To → Resources**. Click on the **Resource Plan** tab. From the **Create** menu, select **Allocation** to add a new allocation request.
- To edit a request, select a request and from the **Actions** drop down menu select the **Edit**. You can only edit requests that have not been submitted. To edit a submitted request, you have to first withdraw the request.
- To withdraw resource allocation requests before it has been approved, select **Actions → Edit → Withdraw** from the Project Resource page.
- To release resource allocation requests, select **Release Allocation** from the Project Resource page. Select if you want to release the allocation for the entire duration or for a partial period. Enter the modified allocation

dates. You can unassign activities associated with this resource by clicking the **Unassign** box. Enter a reason for releasing this project resource.

- To reopen a previously denied resource allocation request, select the **Reopen**.

Adding Team Members

- To add a team member, click the **Resources** link on the Left Navigation bar, or select **Project # → Go To → Resources**.
- From the **Create** menu, select **Team Member**.
- Enter the role, name, and the duration for which you will need this resource. You can also select a labor rate, or override the current labor rate. Click the **Create** button to add a new team member.
- On the Resource Listing page, use the **Actions** menu to edit, delete, or copy a resource, and to view rate change history. You can also edit a resource calendar by editing work hours, work days or by adding, deleting or modifying calendar exceptions.

Resource Planning

- To plan and manage resources, select **Project # → Go To → Resources → Planning**.
- From the **Saved Search:** pull down menu you can select to view your resource plan, the resources plan for all resources and approvals that are pending your approval.
- To view the resource plan broken down in months, change the *Display Frequency* filter on the *Advanced Search* page.

Approving Resources

- To approve resources, go to **Resources** link on the Left Navigation bar, or select **Go To → Resources** from the Top Navigation bar.

- From the **Saved Search:** pull down menu select **My Pending Approvals (Current)**.
- Select an approval and from the **Actions** menu select **Actions → Edit Request**.
- Click the **Save** button if you are still working on the request and want to save your changes. Click the **Approve** button to approve the resources. Click the **Reject** button to reject the resource. Click **Cancel** to discard the changes.

Using the What-if Module

Create a Scenario

- Navigate to the What-if module by clicking on the **What-if** link on the Left Navigation bar, or selecting **Go To → What-if** from the Top Navigation bar.
- From the **Scenario** pull-down menu, select **Create**.
- Click the  button to expand the filters. From the *Display Options* section, select the time unit and dates. Select what you want to view on the bottom grid of the What-if screen (Availability by Roles or Availability by Resources). Choose if you want to include requested allocation and committed allocations. Also, select the number of columns per page.
- Enter the options you want displayed from the *Display Options (what-if)*, *Display Options (Availability by Roles)* and *Display Options (Availability by Resources)* sections.

Editing a Scenario

- Select a scenario from the **Select Scenario** drop down menu.
- From the **Edit** menu, select **What-if**.
- To shift projects/proposals or roles/resources, enter the number of weeks or months under the *Shift* column associated with an activity.

- To exclude/include projects, check the *Exclude* column associated with the activity.
- To edit the resource hours, change the effort associated with the resource. The bottom grid shows the impact in real time.

View Reports

Within EnterpriseTrack, there are Global Reports and Project Specific reports. The report output is available in a variety of formats including .pdf, .csv, .html, .xls

- To view Project specific reports, navigate to the **Reports** link in the Left Navigation bar, or select **Project# → Go To → Reports** within the context of a project.
- Click the **Run** link next to the required report. The final output can be saved to your machine
- To view Global Reports, click the **Reports** link in the Left Navigation bar, or select **Go To → Reports** from the Top Navigation bar.
- To access Standard Reports from the Top Navigation bar select **Go To → Reports → Standard**. Click the  **Run Report** icon next to the required report.
- You can access the Finance Aggregate reports under the **Project Reports (Spreadsheet Reports)**. Click the  **Run with Filters** icon. From the Finance Aggregate Definition section, enter the additional filters (date ranges, finance datasets and snapshot for plan). For *Project Finances Element Monthly Detail* report, enter the *Finance Detail Level*, and *Show Upper Levels* filters. You can also select the output parameters.
- Hide all rows with zero values on heat map reports by selecting **Yes** for the filter *Hide Row with Zero Effect* on the *Output* tab.

- To access Ad-hoc Reports from the Top Navigation bar select **Go To → Reports → Ad-hoc**. Select a report and click on the **[Run]** link.

Dashboards

EnterpriseTrack comes with a standard set of dashboard widgets that you can use to build a specific dashboard view. You can create your own dashboard and share it with selected users, or globally to all dashboard users.

- To view dashboards navigate to the **Dashboards** link in the Left Navigation bar, or select **Go To → Dashboards → View** from the Top Navigation bar.
- To create, customize, copy, paste and share dashboards, go the *Manage Dashboard screen* (**Go To → Dashboards → Manage**).

Creating a Bubble Chart

- Select the name of your dashboard from the Tree pane.
- From the *Edit Dashboards* page, click the **Edit Dashboard**  button. Select **Projects > General** from the *Category* pull-down menu.
- Select the **Project Bubble Chart** dashboard component from the gallery and drag it onto the layout grid.
- Click the **Save Layout** button.
- From the *Manage Dashboards* screen, select the **Project Bubble Chart** component from the *List* menu. Select the *Filters* tab from the *Details* pane and click the **Edit**  button.
- From the *Dashboard* section, select the number of projects to display the parameters to display on the X-axis and Y-axis, the bubble size, and bubble color. If you selected the bubble color to be determined by the *Completion Status*, then enter a percentage for the bubble colors. If you selected *Finance Aggregate* as your X or Y axis parameter, then

select a finance category, finance window, finance dataset, and specify a snapshot for plan.

My Work and My Messages

- To view your My Work page select **My EnterpriseTrack → My Work** from the Top Navigation Bar or click the **My Work** link in the Left Navigation Bar.
- To view your messages, select **My EnterpriseTrack → My Messages** from the Top Navigation Bar or click the **My Messages** link in the Left Navigation Bar. Click the **Create a New Message** button to create a new message.

Timesheets

- To create or edit your timesheet, navigate to the **Timesheets** link from the Left Navigation bar, or select **Go To → Timesheets** from the Top Navigation bar.
- To approve timesheets, go to your **My Work** page and select the timesheet you want to approve. To approve or reject the entire timesheet, click the **Approve All** or **Reject All** button. Click **OK** to confirm your approval. To approve or reject individual line items, select **Approve** or **Reject** from the *Status* column drop-down menu for each line item and click **Submit**.
- To set timesheet close periods, reopen timesheet period for correction, and view timesheet reporting status, navigate to **Timesheets → Administration**.

My Preferences

- To change your password, select **My Password** from the *My EnterpriseTrack* menu **My EnterpriseTrack → My Password**. Enter

your new password and click on the **Change** button.

- To view and edit user profiles, select **My Profile** from the *My EnterpriseTrack* menu **My EnterpriseTrack → My Profile**. Make the necessary changes and click the **Update** button.
- To view your permissions, select **My Permissions** from the *My EnterpriseTrack* menu **My EnterpriseTrack → My Permissions**.
- To view and edit your calendar, select **My EnterpriseTrack → My Calendar**.
- To view and edit your preference, select **My EnterpriseTrack → My Preference**. Select the **Use Browser Language** check box to make the language displayed in EnterpriseTrack match your browser's language setting.
- To view and edit your timesheet delegations, select **My EnterpriseTrack → My Delegations**.

Social Stream

- To access the Social Stream page, select **Go To → Social Stream**
- To display the Stream Ticker, from the Top Navigation bar, select **View → Display Stream Ticker**. To expand the ticker, click the **Toggle**  icon.
- To subscribe to a social stream, from the Projects listing, Ideas listing, Proposals listing pages, the Social Stream page, or from the Project Basics page click the  icon. To unsubscribe, select the  icon.

- To post a message click the **New Message** button.
- To update the Social Stream page, click the **Refresh** button.
- To filter messages, click the **Filter** button.
- To view comments, click the **View Comments** link.
- To enable project event notifications into stream, from the Project Module menu select **(Project#) Go To → Settings**. Click the **[Edit]** link next to each notification. From the Edit Notifications screen, select **Enable Social Stream**.