



Reports User's Guide
Release 9.0

December 2014

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About this Manual

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

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Document Conventions

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

The description of a menu item and its sub-items is described in this document as **(Page Menu) View > Toolbar >Display Print-Data Toolbar**, where you should click on the **View** Page Menu, then find the **Toolbar** sub-item and then click on the **Display Print-Data Toolbar** sub-item.

- ▶ Screen names and field names are in bold text.
- ▶ The actions you need to take on each screen are in bold text.

Getting Around in EnterpriseTrack

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Navigating within EnterpriseTrack

Login to the EnterpriseTrack system using the account your System Administrator has set up for you. The menu system consists of an Application Level Menu, Module Level Menu, Page Level menu and an Item Level Menu. Common functions are grouped together throughout the application.

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

Module Level Menu: Appears as the right most item on the left side of the Top Navigation Bar. This menu appears when you are in a specific module of the application, specifically within a particular Idea, Proposal or Project. It provides access to commonly used functions within the module.

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

Item Level Menu: Appears within each page in lists of items like activities on the Roadmap (WBS) page. It allows you to perform actions specific to that item.

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 and is set by you Administrator. 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 User Productivity Kit (UPK).
- ▶ Click on **Logout** at any time to log out of the application.

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 this  button to expand and collapse the Left Navigation bar to shows icons and text or just icons.

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 EnterpriseTrack.

Navigating to the Reports Module

To navigate to the **Reports** module, from the Top Navigation bar select **Go To > Reports> View**.

About Standard Reports

Standard reports are pre-defined cross-project reports that you can view, run, filter, save, manage, and customize. You can restrict these reports to either an initiative, or across multiple initiatives. You can choose to run these reports as is, or you can modify the filter and output parameters before running these reports. You can also share, schedule reports to run on a scheduled day or time, email the generated report, and view the report history.

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Working with Standard Reports

To access Standard Reports, select **Go To > Reports > Standard** from the Top Navigation bar, or select **Reports >Standard** from the Left Navigation bar. The reports are organized into folders.

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

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Running Standard Reports

To run a standard report:

- 1) Select **Go To > Reports > Standard** from the Top Navigation bar, or select **Reports > Standard** from the Left Navigation bar.
- 2) From the **Tree** pane, select a reports folder.
- 3) From the **List** pane, select a report.
- 4) Click  **Run Report** to run the report using existing filters and output parameters. Click  **Run with Filters** to modify filters or output parameters.
- 5) To modify filters:
 - a. From the **Details** pane, select the **Filters** tab.
 - b. Click  **Expand All** to expand the filter categories.
 - c. Modify the filters.
 - d. Click **Run**.
- 6) To modify output parameters:
 - a. From the **Details** pane, select the **Output** tab.
 - b. Select an output format.
 - c. Choose additional output parameters
 - d. Click **Run**.

Saving and Customizing Standard Reports

Saving Reports

You can save an existing standard report to customize settings. You can:

- ▶ Modify the name of the report
- ▶ Select and save the filter parameters and output criteria.
- ▶ Select filter and output parameters that are visible and editable when reports are run.
- ▶ Schedule run frequency.
- ▶ Manage run report history.
- ▶ Share reports.

All reports you save are displayed under the **My Reports** folder.

To save and customize a standard report:

- 1) Select **Go To > Reports > Standard** from the Top Navigation bar, or select **Reports >Standard** from the Left Navigation bar.
- 2) From the **Tree** pane, select a reports folder.
- 3) From the **List** pane, select a report.
- 4) From the **Details** pane, select **Save As**.
- 5) In the **Save the Report As** window:
 - a. Select a folder name, or enter a name to create a new folder under My Reports.
 - b. Enter a name for this report.
 - c. Click **Save**.

Selecting Filter Parameters

You can selectively narrow the filters and output options to enable only a subset of these settings to be editable, visible or editable/visible when reports are run. To select the filter parameters that you want to view and edit when this report is run:

- 1) From the **Tree** pane, select **My Reports**.
- 2) From the **List** pane, select a report.
- 3) To select the filters you want visible and editable during runtime:
 - a. From the **Details** pane, select the **Filters** tab.
 - b. Click **Edit**.
 - c. Click the **Visible** check box next to filter parameters you want visible.
 - d. Click the **Editable** check box next to filter parameters you want to edit.
- 4) Click **Save**.

Selecting Output Parameters

To select the output parameters that you want to view and edit when this report is run:

- 1) From the **Tree** pane, select **My Reports**.
- 2) From the **List** pane, select a report.
- 3) To select the output parameters you want visible and editable during runtime:
 - a. From the **Details** pane, select the **Output** tab.
 - b. Click **Edit**.
 - c. Click the **Visible** check box next to parameters you want visible.
 - d. Click the **Editable** check box next to parameters you want to edit.
- 4) Click **Save**.

Scheduling and Emailing Reports

You can choose to run reports manually or on a schedule. If you select scheduled, you can decide the following options:

- ▶ The run frequency you want to use.

- ▶ Receive email notification when the report is run.
- ▶ Include the report as an email attachment when email notification is sent.

To schedule a report:

- 1) From the **Tree** pane, select **My Reports**.
- 2) From the **List** pane, select a report.
- 3) From the **Details** pane, select the **Schedule and Email** tab.
- 4) On the **Schedule and Email** tab:
 - a. Click **Edit**.
 - b. Select the run type: **Manual** or **Scheduled**.
- 5) If you selected **Scheduled**:
 - a. Select the day of the week, date, month and year to configure the run frequency.
 - b. Choose if you want to email this report.
 - c. Choose if you want send the report as an attachment.
 - d. Select or enter the email addresses
- 6) Click **Save**.

Saving Report History

You can select how often you want to save the run report history. The report history shows the number of times the selected report was run, if it was a scheduled or a manual run, the format of the report, and the report output. If the report is shared, it also lists the users who ran the report.

To save report run history:

- 1) From the **Tree** pane, select **My Reports**.
- 2) From the **List** pane, select a report.
- 3) From the **Details** pane, select the **History** tab.
- 4) On the **History** tab:
 - a. Click **Edit**.
 - b. Select how often you want to save the report history.
- 5) Click **Save**.

Viewing Report History

The report history shows the number of times the selected report was run, if it was a scheduled or a manual run, the format of the report, and the report output. If a report is shared, it also shows the names of people who ran the report.

To view the report run history:

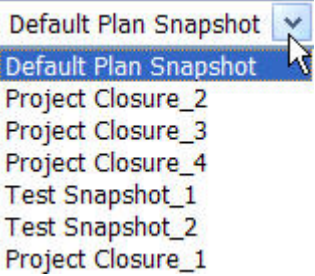
- 1) From the **Tree** pane, select **My Reports**.
- 2) From the **List** pane, select a report.
- 3) From the **Details** pane, select the **History** tab.

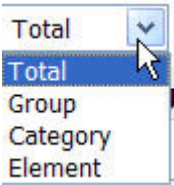
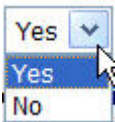
Using Finance Aggregate Report Filters

The table below lists the additional filters that are associated with the *Project Finances Group Aggregate*, *Project Finances Element Aggregate*, and the *Project Finances Element Monthly Detail* reports. The (Set 1) and (Set 2) are two sets of filters for two sets of output columns in the *Finance Group Aggregate* and the *Finances Element Aggregate* reports. The two sets allow you to compare finance aggregate values. You can independently set three filters for each set.

Finance Aggregate Report Filters

Filters	Pull-down Values	Description
Date Range	This Fiscal Year Previous Fiscal Year Next Fiscal Year Any start to end month All Fiscal Years Trailing 12 months Next 12 months This Fiscal Qtr Previous Fiscal Qtr Next Fiscal Qtr This Fiscal Year Q1 This Fiscal Year Q2 This Fiscal Year Q3 This Fiscal Year Q4 Current Month Previous Month Next Month	The range of months that are used to generate the aggregate value of the Total, Group1, Group 2 etc., columns in the aggregate reports. For Monthly reports, this determines the months that will be populated in the output, all other months will have 0 values. For Annual totals, use one of the different Fiscal Year choices. For Quarterly totals, use one of the different Quarter choices. If you want totals for a particular month, use one of the Month choices. For a range of months, use "Any Start or End Month" You can choose aggregation of past or future months.
Finance Dataset	Current Current Current Before This Month Current After This Month Current Before Lock Month Current After/Including Lock Month Plan Plan Before This Month Plan After This Month Plan Before Lock Month Plan After Lock Month Current Before This Month,Plan After This Current Before Lock Month,Plan After Lock	This filter determines which set of month-by-month values for the Date Range specified above are considered for aggregation in the Aggregate reports, and which finance values are fed into the month-by-month columns as non-zero in the Monthly reports. For each project, the system displays by default the "Current" values in the Finance page, and is automatically updated from the Project Activities or from the Project Team Finances (provided the Finance Template has been configured to receive these values). You can also take Snapshots of the "Current" value and store this as a "Plan" and not have it updated as edits are made or as the Project

Filters	Pull-down Values	Description
		Activity and Project Team finances change. This Filter allows you to select which Dataset (Current or Plan) you are interested in outputting in the report. If you are using Lock months to lock finances, the filter also allows you to consider the Lock month in generating the aggregate for the other months. For example, you can choose to take values from before the Lock month if you go through a finance validation that ensures that the numbers before the Lock month have been checked. Further, the filter allows you to also consider this month (when the report is run) and take the Plan values from before this month and the Current values from after (and including) this month.
Snapshot for Plan		If the Finance Dataset filter refers to a Plan value, then the "Snapshot for Plan" further defines which of the Snapshots should be used for the report output. The Default Plan Snapshot is always at the top of the list. The system shows the complete list of all Snapshots taken in the drop-down list (up to a limit of 100). To ensure consistent aggregation of values, it is recommended that all users that make snapshots use a consistent naming scheme.

Filters	Pull-down Values	Description
Finance Detail Level		The filter sets the level of detail of the Finance element hierarchy that is shown in the report. This also sets the number of rows in the output per project. Total: means show only the top level (Total). Group: means show the Group level, one level below Total (up to 5, depends on number of Groups configured) Category: means show the Category level, 2 levels below Total Element: means show the Element level, 3 levels below Total
Show Upper Levels		This filter decides if the output should show higher levels of the Finance items hierarchy when a lower level item is chosen in the Finance Detail Level filter above This is relevant if you are doing your own aggregation of the element level values using Excel and you do not want the Category, Group, Total level values to interfere with this aggregation.

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

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

Output Parameters	Description
Break down Finance Details by Organization	Select this check box to expand the finance details by organization. Each finance line item in the report is expanded and broken down to show the finance allocation by organization. Note: This report is usable only if the finance allocation percent totals 100%. The system displays a warning message if it does not equal 100%.

Deleting Reports

To delete a report:

- 1) From the **List pane**, select a report.
- 2) Click  **Delete**.

Copying Reports

To copy a report:

- 1) Select a report from the **List pane**.
- 2) Click  **Copy**.
- 3) From the **Tree pane**, select a folder under **My Reports**.
- 4) From the **List pane**, click  **Paste**.

Managing Report Folders

You can copy an existing report folder to edit the folder name, add reports, delete reports, and adjust filters and output parameters.

To copy a report folder:

- 1) From the **Tree pane**, select the report folder you want to copy.
- 2) Click  **Copy**.
- 3) Select the **My Reports** folder.
- 4) Click  **Paste**. A copy of the selected folder is now in your **My Reports** folder.
- 5) From the **Details pane**, click  **Edit** to change the name of the folder.

To delete a report folder:

- 1) From the **Tree pane**, select the reports folder.
- 2) Click  **Delete**.

Pre-defined Standard Reports

Listing Reports

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Idea Listing Report

Based on your filters, this report displays all ideas in the system. It displays the idea number, title, status, description of problem/opportunity, division, business unit, primary contact, assignee, submission date, date accepted/rejected, and the evaluation score.

Filter Parameters

You can filter on pull down status, idea basics, organization hierarchy and idea custom fields.

Output Parameters

You can select the primary output column to sort by, sort direction, number rows to display per page, maximum number of rows to display per report, and if the output should be compressed. The output choices are CSV, PDF and HTML.

Sample Report

Idea Listing Report											
Show Current Filters										Done	
Actions	Idea Number	Idea title	Idea Status	Description of Problem/Opportunity	Division	Department	Primary Contact	Assignee	Submission Date	Date Accepted/Rejected	Evaluation Score
[View Details]	1	Hong Kong Office Relocation	Owner Assigned	An office move at the end of the lease in or a partial or full refurbishment of the current offices. This is the IT part of the relocation or refurbishment.	Info Tech	Operations	Allen, Vanessa	Allen, Vanessa	Feb/11/2014	N/A	6.90
[View Details]	2	Lighting Efficiency for Building 51	Owner Assigned	Develop companywide lighting specifications in accordance with utility cost reduction, IECC compliance, supply continuity at competitive costs, and brand standards.	Info Tech	Operations	Allen, Vanessa	Kim, Marie	Feb/11/2014	N/A	7.80
[View Details]	3	Broadband Expansion for Remote Offices	New	Identify field communication needs/enhancements to support broadband expansion for remote offices - to be evaluated on ROI basis against time savings from all time spent on duties.	Engineering	Internal	Allen, Vanessa		Feb/11/2014	N/A	7.10

Charter Request Listing

Based on your filters, this report displays all charter requests in the system. It displays the charter ID, name, status, project type, roadmap, division, business unit, manager, planned start date, actual start date, planned project close date, initial forecast benefits, initial forecast cost, and the evaluation score.

Note: Depending on your configuration, the Project Request Listing is the same as Charter Request Listing Report label.

Filter Parameters

You can filter on pull down status, initiative, proposal basics, classification fields, and organization hierarchy.

Output Parameters

You can select the primary output column to sort by, sort direction, number rows to display per page, maximum number of rows to display per report, and if the output should be compressed.

The output choices are CSV, PDF and HTML.

Sample Report

Project Request Listing																		
Show Current Filters																		Done
Actions	Project Request ID	Project Request Name	Project Request Status	Project Type	Schedule	Division	Department	Manager	Planned Project Start Date	Actual Project Start Date	Target Project Close Date	Initial Forecast Benefits	Initial Forecast Cost	Initial Forecast Soft Dollar	Initial Forecast Group4	Initial Forecast Group5	Initial Forecast Total	Evaluation Score
[View Details]	1	HR Homepage Banner Update	Team Assigned	IT		Info Tech	Operations	Adams, Don	Feb/03/2014		Jul/18/2014	\$350,000	\$500,000				\$500,000	5.2
[View Details]	3	Customer Experience	Project Created	IT		Info Tech	Apps	Baldwin, Emmett	Sep/23/2013	Sep/23/2013	May/23/2014	\$130,000	\$57,000				\$57,000	0
[View Details]	4	Update for GL Journal Transfer	Project Created	IT		Info Tech	Operations	Swords, Carolyn	Dec/16/2013	Dec/16/2013	May/30/2014	\$570,000	\$230,000				\$230,000	0
[View Details]	5	*Data Center Consolidation	Project Created	IT		Info Tech	Data	Forsythe, John	Dec/09/2013	Dec/09/2013	May/23/2014	\$722,000	\$567,000				\$567,000	0
[View Details]	6	*Database Migration	Project Created	IT		Info Tech	Data	Baldwin, Emmett	Jan/06/2014	Jan/06/2014	Aug/01/2014	\$522,000	\$431,000				\$431,000	5.1
[View Details]	7	*Develop Smaller Arc Handset	Project Created	IT		Info Tech	Apps	Neal, Ryan	Nov/18/2013	Nov/18/2013	May/02/2014	\$1,000,000	\$720,000				\$720,000	0.9

Project Listing

Based on your filters, this report displays all projects in the system. It displays the initiative, phase, status, start date, forecast, functional area, and region.

Filter Parameters

You can filter on pull down status, initiative, project basics, project dates, organization hierarchy, finances, project custom fields, classification fields, and alignment tree.

Output Parameters

You can select the primary output column to sort by, sort direction, number rows to display per page, maximum number of rows to display per report, and if the output should be compressed.

The output choices are CSV, PDF and HTML.

Sample Report

Project Listing Report							
Show Current Filters							Done
Printer Friendly Version							
All financials in USD							
Action	Initiative	Project Name	Phase	Status	Forecast	Start Date	Region
[Edit] [Project Reports]	Information Technology	DR/BCP Annual Test	Implementation-ITIL	Active	\$19,200	Oct/07/2013	Global
[Edit] [Project Reports]	Information Technology	Develop Smaller Arc Handset	Plan/Design-Short	Active	\$158,800	Nov/18/2013	NA
[Edit] [Project Reports]	Financial Services	Pipeline Enhancements	Measure	Active	\$23,040	Mar/17/2014	NA
[Edit] [Project Reports]	Financial Services	SOX Compliance	Regulatory Validation	Active	\$60,200	Oct/31/2013	Global
[Edit] [Project Reports]	New Product Development	NuGreen Bio Bottle	Scoping	Active	\$0	Jul/08/2013	LAD
[Edit] [Project Reports]	New Product Development	Techny Force Flex II	Marketing	Active	\$0	May/01/2013	Global
[Edit] [Project Reports]	Continuous Improvement	Maintenance Parts Optimization		Completed-Post Realization	\$652,500	Oct/01/2013	NA
[Edit] [Project Reports]	Continuous Improvement	HR Self Service System		Completed-Post Realization	\$661,500	May/15/2013	NA
[Edit] [Project Reports]	Information Technology	Implement ITFM	Execute/Control-Short	Active	\$253,800	Oct/21/2013	Global
[Edit] [Project Reports]	Continuous Improvement	Warranty Repair Processing		Completed-Post Realization	\$661,500	May/15/2013	NA
[Edit] [Project Reports]	Continuous Improvement	Marketing Event Set Up Process		Completed-Post Realization	\$661,500	May/15/2013	NA
[Edit] [Project Reports]	Continuous Improvement	Packaging Tolerance Analysis		Completed-Post Realization	\$541,100	May/15/2013	NA
[Edit] [Project Reports]	Information Technology	eSignatures Solution	Plan/Design-Short	Active	\$37,799	Sep/09/2013	Global
[Edit] [Project Reports]	Information Technology	Microfiche Conversion	Plan/Design-Short	Active	\$275,218	Dec/09/2013	NA
[Edit] [Project Reports]	Information Technology	Content Management-P2	Stage Boundary Management-P2	Active	\$116,640	Feb/10/2014	NA
[Edit] [Project Reports]	Information Technology	Customer Experience-P2	Closing-P2	Active	\$51,160	Nov/18/2013	Global
[Edit] [Project Reports]	Information Technology	C83 Horn R&D	Plan/Design-Short	Active	\$67,200	Nov/18/2013	EMEA
[Edit] [Project Reports]	Information Technology	Develop New Module-Agile	Sprint 1 - Agile	Active	\$80,800	Jan/27/2014	NA

Project Listing Report with Activity List

Based on your filters, this report displays project details and project activity details like the activity, type, sub type, path, name, status, status indicator, number of attachments, tollgate activities, owner and dates (plan start, plan completion, actual start, and actual completion).

Filter Parameters

You can filter on pull-down status, initiative, project basics, project dates, organization hierarchy, project custom fields, and activity details like the type, name, status, number of attachments, dates, and the status of milestones.

Output Parameters

You can select the primary output column to sort by, sort direction, number rows to display per page, and maximum number of rows to display per report.

The output choices are CSV, PDF and HTML.

Sample Report

Project Listing Report with Activity List

Show Current Filters

Done

Project Details

Initiative	Financial Services	Project Manager	Smith, John
Project Id	89	Analyst	Archers, Anne
Project Name	*20XX SWIFT Mandate	Architect	Booke, Rachael
Project Status	Active	Project Sponsor	Boozer, Dan
Current Phase	Execution/Control	Developer	Floorman, Lori
Project Type	Compliance	Engineer	Esters, Jayson
Display project with Activities with specified status	FALSE	QA/QC Tester	Daisch, Deb
Schedule	Compliance	DBA	Lawson, Elise
% Completion	4.19	QA/QC Tester	Covens, Bryan
Locked	\$15,120	Compliance Officer	Goodwin, Angella
Not Locked	\$199,000		
Remaining Unlocked	\$0		
Total	\$214,120		

Project Activity Details

Type	Sub Type	Path	#	Name	Status	Attachment	Is Tollgate	Owner	Dates			
									Plan Start	Plan Completion	Actual Start	Actual Completion
Task		7	2	Initiating Activities	Completed	0	No	Boozer, Dan	Apr/01/2014	Apr/11/2014	Apr/01/2014	Apr/11/2014
Task		7	5	Plan/Design Activities	Completed	0	No	Booke, Rachael	Apr/15/2014	Apr/25/2014	Apr/15/2014	Apr/25/2014

Resource Listing

Based on your filters, this report displays all resources. It displays the name, resource type, resource sub type, email address, phone number, access profile, allowed roles, division, business unit, region, manager, and initiative.

Filter Parameters

You can filter on pull-down status, initiative, resource basics, and organization hierarchy.

Output Parameters

You can select the primary output column to sort by, sort direction, number rows to display per page, maximum number of rows to display per report, and if the output should be compressed.

The output choices are CSV, PDF and HTML.

Sample Report

Resource Listing Report													
Show Current Filters													
Name ▲	Owner Name	Resource Type	Resource Sub Type	Email	Phone	Access Profile	Allowed Roles	Division	Department	Customer	Region	Manager	Initiative
Adams, Don		Person	Employee	pilot+dadams@oracle.com		IT PM	Project Sponsor,Project Manager	Info Tech				Allen, Vanessa	Information Technology,Financial Services,Continuous Improvement,New Product Development
Aldridge, Mike		Person	Employee	pilot+Mike.Aldridge@oracle.com		CI PM	Master Black Belt,Project Manager	Finance	Cont Improvement		NA	Ives, Victoria	Continuous Improvement
Allen, Vanessa		Person	Employee	pilot+vallen@oracle.com	+1-206-555-1212 (Office)	IT Management	Project Sponsor,Project Manager	Info Tech				Adams, Don	Information Technology,Financial Services,Continuous Improvement,New Product Development
Allen, Pierce		Person	Employee	pilot+pallen@oracle.com		IT PM	Project Manager	Info Tech				Allen, Vanessa	Information Technology
Althaus, Conrad		Person	Employee	pilot+Conrad.Aldhaus@oracle.com		CI Resource	Process Owner	Finance	Cont Improvement		JAPAC	Ives, Victoria	Continuous Improvement
Anchors, Annie		Person	Employee	pilot+aanchors@oracle.com		IT Resource	Analyst,Analyst-Approval Required	Info Tech				Allen, Vanessa	Information Technology
Anders, Bill		Person	Employee	pilot+bill.anders@oracle.com		FS PM	Project Sponsor,Project Manager	Finance				Smith, John	Financial Services

Project Status

Based on your filters, this report displays the status of projects. It displays the ID, name, status, team size, timesheets, related entities #, and activities # with milestones and key milestones.

Filter Parameters

You can filter on pull down status, initiative, project basics, project dates, organization hierarchy, finances, project custom fields, classification fields, and alignment tree.

Output Parameters

You can select the primary output column to sort by, sort direction, number rows to display per page, maximum number of rows to display per report, and if the output should be compressed.

The output choices are CSV, PDF and HTML.

Sample Report

Project Status Report																
Show Current Filters																
Project ID	Project Name	Status	Team Size	Timesheets (#)	Related Entities (#)							Activities (#)				
					Linked Projects	Documents	Activities	Notes	Issues	Metrics	Metric Values	Alignments	Open	N/A	Completed	Top Level
1	DR/BCP Annual Test	Active	3	0	0	0	28	0	0	0	0	3	10	0	18	5
9	Database Migration	Active	4	0	0	0	16	0	0	0	0	3	12	0	4	5
76	Receivables Dunning Upgrade	Active	6	0	0	0	17	0	1	0	0	2	9	0	8	5
75	West Campus Wireless Upgrade	Active	4	0	0	0	16	0	0	0	0	2	8	0	8	5
7	*ERP Upgrade	Active	8	4	0	2	20	0	1	4	106	3	15	0	5	5
6	Data Center Consolidation	Active	5	0	1	0	18	0	1	0	0	3	12	0	6	5
5	Update for GL Journal Transfer	Active	6	0	0	0	16	0	0	0	0	3	11	0	5	5
41	ADM History Refresh	Active	6	0	0	0	18	0	0	5	485.1	3	12	0	6	5
40	Content Management	Active	5	0	0	0	16	0	0	0	0	3	12	0	4	5
4	Customer Experience	Active	4	0	0	0	19	0	1	0	0	3	11	0	8	5
38	NV2 Project	Active	9	0	0	0	17	0	1	0	0	3	6	0	11	5
33	Network Load Balancing	Active	4	0	0	0	16	0	0	0	0	3	12	0	4	5
3	Data to Voice / Voice to Data	On Hold	5	0	0	0	16	0	0	0	0	3	9	0	7	5
21	Develop New Module-Agile	Active	8	4	0	0	21	0	2	0	0	3	15	0	6	5
2	C83 Horn R&D	Active	5	0	0	0	17	0	1	0	0	3	12	0	5	5
16	Customer Experience-P2	Active	6	0	0	0	29	0	0	0	0	3	5	0	24	7
15	Content Management-P2	Active	5	4	0	0	45	0	1	0	0	3	31	0	14	9
14	Microfiche Conversion	Active	7	0	0	0	16	0	0	0	0	3	9	0	7	5
12	eSignatures Solution	Active	9	0	0	0	16	0	0	0	0	3	10	0	6	5
11	Implement ITFM	Active	9	0	0	0	16	0	0	0	0	3	8	0	8	5
Totals				12	1	2	393	-	9	9	591.1	58	229	-	164	106

Resource Status

Based on your filters, this report displays the status of resources. It displays the name, login ID, status, last login date, timesheets, last timesheet submission date, and related entities.

Filter Parameters

You can filter on initiative, resource basics, and resource filterable custom fields.

Output Parameters

You can select the number rows to display per page, maximum number of rows to display per report, and if the output should be compressed.

The output choices are CSV, PDF and HTML.

Sample Report

Resource Status Report												
Show Current Filters												
Last Name	First Name	Middle Name	Login Id	Status	Last Login Date	Timesheets (#)	Last Timesheet Submission Date	Related Entities				
								Ideas	Proposals	Projects	Activities	Documents
Adams	Don		dadams	Active	Jul/28/2014	0	Aug/05/2014	0	2	1	16	0
Aldridge	Mike		malldridge	Active	May/13/2014	0		0	11	6	31	0
Allen	Pierce		pallen	Active	Jul/07/2014	0		0	3	2	25	0
Allen	Vanessa		vallen	Active	Aug/07/2014	4		3	21	3	50	4
Althaus	Conrad		calthaus	Active		0	May/06/2014	0	1	1	18	0
Anchors	Annie		aanchors	Active		0		0	0	1	4	0
Anders	Bill		banders	Active		0		0	0	0	0	0
Anderson	Dana		danderson	Active	Jul/23/2014	1		0	20	1	19	2
Archers	Anne		aarchers	Active		0		0	0	8	23	0
Arnold	Trevor		tarnold	Active		0		0	2	2	14	0
Arthur	Pam		parthur	Active		0		0	0	0	0	0
Awender	Robert		rawender	Active		0		0	1	0	0	0
Bailey	Steve		sbailey	Active		0		0	2	2	7	0
Baladud	Neena		nbaladud	Active		0		0	2	1	13	0
Baldwin	Emmett		ebaldwin	Active		0		0	3	2	19	0
Baldwin	Doug		dbaldwin	Active	May/23/2014	0		0	0	2	8	0
Bales	Alison		abales	Active		0		0	0	1	4	0
Ballard	Doug		dballard	Active		0		0	0	0	0	0
Banker	Paul		pbanker	Active		0		0	0	1	2	0
Barnes	Heidi		hbarnes	Active		0		0	2	2	14	0
Totals						5		3	70	36	267	6
Averages						0		0	4	2	13	0

Activity Detail Report

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

Filter Parameters

You can filter on pull-down status, initiative, project basics, project dates, project organization hierarchy, project methodology, project custom fields, project classification fields, program, project alignment tree, activity, activity custom fields, and resource basics.

Output Parameters

You can select the maximum number of rows to display per report, resource details, and the WBS code column. To view resource information split into multiple rows per project, with each resource role displayed in separate rows, select **Yes** for Resource Details. If you select **No** for Resource Details, then each activity with all its assignments is contained within a single cell in that row.

The output choices are CSV, MS Excel, PDF, and HTML.

Sample Report

Activity Detail Report														
Show Current Filters														
Done														
Project ID	Project Name	Manager	Start Date	Target Project Close Date	Actual Realization Date	#	◆	Name	Description	Status	Priority	Severity	Type	Sub Type
1	DR/BCP Annual Test	Allen, Pierce	Oct/07/2013	Jul/18/2014		1		Definition-ITIL		Completed			Phase	Definition-ITIL
1	DR/BCP Annual Test	Allen, Pierce	Oct/07/2013	Jul/18/2014		1		Access		Open			Risk	
1	DR/BCP Annual Test	Allen, Pierce	Oct/07/2013	Jul/18/2014		2		Review current status		Completed			Task	

Metrics Listing Report

Use the Metrics Listing report to display project metrics based on your filters.

Filter Parameters

You can filter to show metrics for a specified date range and select the recent number of metric data entries (1 to 50) to display.

Output Parameters

You can select the output columns, the column to sort by, and the sort order.

The available report formats are: CSV, HTML, and PDF.

Sample Report

Metric Listing Report																
Show Current Filters																
MD Date	Project ID	Project Name	Metric ID	Name	Description	Category	Type	Units	Baseline	Baseline LCL	Baseline UCL	Baseline Confidence Level	Target	Target LCL	Target UCL	Target Confidence Level
	89	*20XX SWIFT Mandate	1	cost avoidance		Primary	Opportunity Cost (\$)					95				95
	83	*Cellulose Acetate Microflakes	1	Market Share		Primary	Market Share					95				95
Mar/10/2014	68	*Customer Financing Approval Process	1	Days		Primary	Cycle Time					95			96	95
Jun/26/2014	7	*ERP Upgrade	1	Defects		Primary	Defects Per Unit (u)					95				95
	91	*Global Capital Markets DF Reporting	1	cost avoidance		Primary	Opportunity Cost (\$)					95				95
Jul/01/2014	58	*Petroleum Supply Management	1	Diesel Fuel Savings		Primary	Gallons of Diesel					95	1425	1415	1435	95
	92	*Regulatory Q Repeal (DF Impact)	1	cost avoidance		Primary	Opportunity Cost (\$)					95				95
	96	*Secure Credit Card	1	New customers		Primary	Growth					95				95
	85	*Web Banking System Upgrade	1	New customers		Primary	Growth					95				95
Jun/29/2014		ADM History Report		Update		Secondary	Days Reported					95				95

Project & Metrics Template

Use the Project & Metrics Template report to display project metadata and details of associated metrics.

Filter Parameters

You can filter on initiative, organization hierarchy, project classification fields, project basics, and metrics. You can filter to show metrics for a specified date range and select the recent number of metric data entries (1 to 50) to display.

Output Parameters

You can select the output columns, the sort by column, and the sort order.

The available report formats are: CSV, HTML, and PDF.

Sample Report

Projects Metrics Template Report																	
Show Current Filters																	
Created Date	MD Date	Metric ID	Name	Description	Category	Type	Units	Baseline	Baseline LCL	Baseline UCL	Baseline Confidence Level	Target	Target LCL	Target UCL	Target Confidence Level	Entitlement	Tracking Frequency
		1	cost avoidance		Primary	Opportunity Cost (\$)					95				95		No Schedule
		1	Market Share		Primary	Market Share					95				95		No Schedule
Jul/07/2014	Mar/10/2014	1	Days		Primary	Cycle Time					95			96	95		No Schedule
Jun/26/2014	Jun/26/2014	1	Defects		Primary	Defects Per Unit (u)					95				95		No Schedule
		1	cost avoidance		Primary	Opportunity Cost (\$)					95				95		No Schedule
Jul/07/2014	Jul/01/2014	1	Diesel Fuel Savings		Primary	Gallons of Diesel					95	1425	1415	1435	95	15,000.00	Weekly
		1	cost avoidance		Primary	Opportunity Cost (\$)					95				95		No Schedule

Non-WBS Activity Report

Use the Non-WBS Activity report to display a detailed list of all non-WBS activities configured in your system. It also displays custom fields that are specific to non-WBS activities.

Filter Parameters

You can filter on pull-down status, initiative, project basics, project dates, organization hierarchy, project custom fields, alignment tree, programs, activities, activity custom fields and resource basics.

Output Parameters

The available report formats are: CSV, HTML, MS Excel, and PDF. You can also select the maximum number of rows to show per report.

Sample Report

Non-WBS Activity Report															
Show Current Filters															
Done															
Project ID	Project Name	Manager	Start Date	Target Project Close Date	Actual Realization Date	Activity Number	Name	Description	Status	Priority	Severity	Type	Attachment	Owner	Assign to
1	DR/BCP Annual Test	Allen, Pierce	Oct/07/2013	Jul/18/2014			Access		Open			Risk	0		
1	DR/BCP Annual Test	Allen, Pierce	Oct/07/2013	Jul/18/2014			Funding		Open			Risk	0		
2	C83 Horn R&D	Ferguson, Bruce	Nov/18/2013	May/14/2014		1	Supplier late with raw materia		Open		High	Issue	0	Ferguson, Bruce (Project Manager)	
4	Customer Experience	Baldwin, Emmett	Sep/23/2013	Apr/01/2014			Pilot solution availability		Open			Risk	0		
4	Customer Experience	Baldwin, Emmett	Sep/23/2013	Apr/01/2014		1	Losing Resources		Open		High	Issue	0	Baldwin, Emmett (Project Manager)	
4	Customer Experience	Baldwin, Emmett	Sep/23/2013	Apr/01/2014			More time needed for Pilot		Open			Change Request	0		
6	Data Center Consolidation	Forsythe, John	Dec/09/2013	Jun/04/2014			Resources may get pulled to other projects		Open			Risk	0		
6	Data Center Consolidation	Forsythe, John	Dec/09/2013	Jun/04/2014		1	trial		Open	High	Unassigned	Risk	0	Forsythe, John (Project Manager)	Forsythe, John

Project Reports (Summary Reports)

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Finance Summary Report

Based on your filters, this report displays the finance summary. It displays the finance categories and based on your filters the realized or forecast finances for each fiscal year. Before running this report, you must choose a Finance Template and the Finance Type from the **Filter** tab.

Filter Parameters

You can filter on pull-down status, initiative, finances, project basics, project dates, organization hierarchy, project custom fields, classification fields, and alignment trees.

Output Parameters

The available report formats are: CSV, HTML, and PDF.

Sample Report

Financial Summary Report All financials in USD						
Show Current Filters						
Finance Categories	Forecast Finances for Fiscal Years					Total
	2012	2013	2014	2015	2016	
Total	0	0	0	0	0	0
Cost	0	0	0	0	0	0
Benefits	0	0	0	0	0	0

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Project Summary By Organization

Based on your filters, this report displays the finance summary by organization. Before running this report, you must choose a Finance Template from the **Filter** tab. For each division it shows the project count (active, closed, and total), project finances, resource count and project lead count.

Filter Parameters

You can filter on pull-down status, initiative, finances, project basics, project dates, organization hierarchy, project custom fields, classification fields, org hierarchy display options and alignment trees.

Output Parameters

The available report formats are: CSV, HTML, and PDF.

Sample Report

Summary By Organization Report All financials in USD							
Show Current Filters							
Division	Project Count		Project Finances			Resource Count	Project Lead Count
	Active	Closed	Total	Benefits	Cost		
Branch Banking	0	0	0.00	0.00	0.00	0	0
Card Svcs	0	0	0.00	0.00	0.00	0	0
Corporate	0	0	0.00	0.00	0.00	0	0
Engineering	0	0	0.00	0.00	0.00	39	0
Finance	0	0	0.00	0.00	0.00	132	0
Info Tech	0	0	0.00	0.00	0.00	62	12
Retail	0	0	0.00	0.00	0.00	0	0
Services	0	0	0.00	0.00	0.00	0	0
Totals	0	0	0	0	0	233	12

[Close](#)

Project Summary By Organization

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

Filter Parameters

You can filter on pull-down status, initiative, alignment node, finances, project basics, project dates, organization hierarchy, project custom fields, and classification fields.

Output Parameters

The available report formats are: CSV, PDF, and HTML

Sample Report

Summary By Alignment Report All financials in USD						
Show Current Filters						
Strategies	Project Count		Project Finances			
	Active	Closed	Total	Benefits	Cost	
Increase Sales	0	0	0	0	0	0
Lower Expenses	0	0	0	0	0	0
Increase Cust Sat	0	0	0	0	0	0
Totals	0	0	0	0	0	0
Close						

Project Summary By Project Source

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

Filter Parameters

You can filter on pull-down status, initiative, finances, organization hierarchy, project basics, project dates, classification fields, project custom fields, and alignment trees.

Output Parameters

The available report formats are: CSV, PDF, and HTML

Sample Report

Classification Summary Report All financials in USD								
Show Current Filters								
Project Source	Project Count			Project Finances				
	Active	Closed	Total	Benefits	Cost	Soft Dollar	Group	
Corporate	0	0	0.00	0.00	0.00	0.00	0	0
Customer Support	22	13	51,600,000.00	258,000,000.00	208,400,000.00	258,000,000.00	103,200,000.00	
Engineering	0	0	0.00	0.00	0.00	0.00	0	0
Finance	24	12	52,800,000.00	264,000,000.00	211,200,000.00	264,000,000.00	105,600,000.00	
Manufacturing	0	0	0.00	0.00	0.00	0.00	0	0
Marketing	5	12	13,200,000.00	216,000,000.00	172,000,000.00	216,000,000.00	86,400,000.00	
Project Management	0	0	0.00	0.00	0.00	0.00	0	0

Project Summary By Functional Area

Based on your filters, this report displays the finance summary by functional area. It displays the functional area, project count (active and closed) and project finances. Before running this report, you must choose a Finance Template from the **Filter** tab.

Filter Parameters

You can filter on pull-down status, initiative, finances, organization hierarchy, project basics, project dates, classification fields, project custom fields, and alignment trees.

Output Parameters

The available report formats are: CSV, PDF, and HTML

Sample Report

Financial Savings by Department.xls [Read-Only]					
	A	B	C	D	E
1	ORACLE Instantis				
2	Department Project Savings Summary - 2014				
3					
4					
5	Department/Project		Initiative	YTD	FY Forecast
6	Cont Improvement	Finance			
7	65	AR process improvement	Continuous Improvement	-139,700	-191,200
8			Total Finance	-139,700	-191,200
9			Total Cont Improvement	-139,700	-191,200
10			Grand Total	-139,700	-191,200
11					
12	Note: YTD is calculated from fiscal start month to finance lock month. All financials in USD				
13					

Project Summary By Process Area

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

Filter Parameters

You can filter on pull-down status, initiative, finances, organization hierarchy, project basics, project dates, classification fields, project custom fields, and alignment trees.

Output Parameters

The available report formats are: CSV, PDF, and HTML

Sample Report

Classification Summary Report All financials in USD							
Show Current Filters							
Process Area	Project Count		Total	Project Finances			
	Active	Closed		Benefits	Cost	Soft Dollar	Group
Coating	0	0	0.00	0.00	0.00	0.00	
Customer Service	20	10	45,000,000.00	228,000,000.00	182,400,000.00	228,000,000.00	91,200,000.00
Engineering	0	0	0.00	0.00	0.00	0.00	0.00
Finance	16	11	39,600,000.00	198,000,000.00	158,400,000.00	198,000,000.00	79,200,000.00
HR	0	0	0.00	0.00	0.00	0.00	0.00
IT	18	10	43,200,000.00	216,000,000.00	172,800,000.00	216,000,000.00	86,400,000.00
Manufacturing	0	0	0.00	0.00	0.00	0.00	0.00

Project Summary Stats by Role

Based on your filters, this report displays the project summary statistics by resource roles. Before running this report, you must choose an Initiative from the **Filter** tab.

Filter Parameters

You can filter on pull-down status, initiative, reporting date range, organization hierarchy, and finances.

Output Parameters

You can choose the report format, if you want to compress the output by generating a .zip file, and include or exclude graphs from the report.

The available report formats are: CSV, PDF, and HTML

Sample Report

Project Summary Stats by Role					
Show Current Filters					
Realized Savings					
Project Manager	Jan/14	Feb/14	Mar/14	Apr/14	May/14
Allen, Pierce	\$84,200	\$19,200	\$0	\$0	\$0
Allen, Pierce	\$84,200	\$19,200	\$0	\$0	\$0
Allen, Vanessa	\$145,440	\$58,000	\$28,000	\$28,000	\$28,000
Allen, Vanessa	\$145,440	\$58,000	\$28,000	\$28,000	\$28,000
Allen, Vanessa	\$145,440	\$58,000	\$28,000	\$28,000	\$28,000
Arnold, Trevor	\$405,560	\$0	\$0	\$0	\$0
Arnold, Trevor	\$405,560	\$0	\$0	\$0	\$0
Baldwin, Emmett	\$185,720	\$0	\$0	\$0	\$0
Baldwin, Emmett	\$185,720	\$0	\$0	\$0	\$0
Barnes, Heidi	\$29,000	\$0	\$0	\$0	\$0
Barnes, Heidi	\$29,000	\$0	\$0	\$0	\$0
Ferguson, Bruce	\$244,200	\$0	\$0	\$0	\$0
Ferguson, Bruce	\$244,200	\$0	\$0	\$0	\$0
Ferguson, Bruce	\$244,200	\$0	\$0	\$0	\$0
Ferguson, Bruce	\$244,200	\$0	\$0	\$0	\$0
Forsythe, John	\$80,400	\$85,120	\$53,480	\$22,200	\$17,200
Forsythe, John	\$80,400	\$85,120	\$53,480	\$22,200	\$17,200
Neal, Ryan	\$243,320	\$0	\$0	\$0	\$0
Neal, Ryan	\$243,320	\$0	\$0	\$0	\$0

Closed Project Listing

Based on your filters, this report displays all closed projects. It displays the initiative, project number, name and planned project close date and project type.

Filter Parameters

You can filter on pull-down status, initiative, organization hierarchy, and finances.

Output Parameters

You can choose the report format and if you want to compress the output by generating a .zip file.

The available report formats are: CSV, PDF, and HTML

Sample Report

Project Closed - 2014				
Show Current Filters				
Initiative	Project Number	Project Name	Target Project Close Date	Project Type
Continuous Improvement	112	Packaging Tolerance Analysis	Feb/14/2014	Six Sigma
Continuous Improvement	65	AR process improvement	Apr/30/2014	Six Sigma
Continuous Improvement	111	Marketing Event Set Up Process	May/15/2014	Six Sigma
Continuous Improvement	108	HR Self Service System	May/15/2014	Six Sigma
Close				

Active/Closed Project Report

Based on your filters, this report displays all active and closed projects. It displays the initiative, project number, name, close date, project type, and the finances associated with the project.

Filter Parameters

You can filter on pull-down status, initiative, organization hierarchy, and finances.

Output Parameters

You can choose the report format and if you want to compress the output by generating a .zip file.

The available report formats are: CSV, PDF, and HTML

Sample Report

Active/Closed Project Report All financials in USD					
Show Current Filters					
ORACLE Instantis - 2014					
All financials in USD					
	Num of Projects	Expected Benefits	Expected Cost	Actuals Benefits	Actuals Cost
Working Projects	56	\$41,409,432	\$13,489,359	\$749,842	\$4,081,392
Projects Closed 2014	4	\$2,559,700	\$310,000	\$532,600	\$10,000
Projects Closed 2013	2	\$1,595,790	\$0	\$281,790	\$0
Working Projects					
Initiative	Project Number	Project Name	Project Close Date	Project Type	
Information Technology	1	DR/BCP Annual Test	-	Process	
Information Technology	10	Develop Smaller Arc Handset	-	IT	
Financial Services	100	Pipeline Enhancements	-	Transformation	
Financial Services	101	SOX Compliance	-	Compliance	
New Product Development	104	NuGreen Bio Bottle	-	Product Development	
New Product Development	105	Techny Force Flex II	-	Product Development	
Information Technology	11	Implement ITFM	-	IT	
Information Technology	12	eSignatures Solution	-	IT	
Information Technology	14	Microfiche Conversion	-	IT	
Information Technology	15	Content Management-P2	-	IT	
Information Technology	16	Customer Experience-P2	-	IT	
Information Technology	2	C83 Horn R&D	-	IT	

Project Report (Detail Reports)

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Project Listing Report with Activity List

Based on your filters, this report displays the projects by resource roles. It displays the project manager, project name, project ID, completion, status, type, YTD realized benefits, current forecast, % estimated savings, % defect reduction, and defect % of entitlement. Before running this report, you must choose an Initiative and Resource Role from the **Filter** tab.

Filter Parameters

You can filter on pull down status, initiative, reporting date range, organization hierarchy, and finances.

Output Parameters

You can select the report format and if the output should be compressed. The available report formats are CSV, PDF and HTML.

Sample Report

Project Listing By Role											
Show Current Filters											
Project Manager Project Metrics											
Project Manager	Project Name	Project Id	Finance Director	Project Manager	Architect	DBA	DBA-Approval Required	Project Sponsor	Consultant	Developer	Graphics Designer
Allen, Pierce	DR/BCP Annual Test	1		Allen, Pierce				Panella, Louis	Brock, Raheem		
Allen, Pierce	Receivables Dunning Upgrade	76		Allen, Pierce				Trumain, Paul		Darsch, Nancy	Musial, Mark
Allen, Pierce	DR/BCP Annual Test	1		Allen, Pierce				Panella, Louis	Brock, Raheem		
Allen, Pierce	Receivables Dunning Upgrade	76		Allen, Pierce				Trumain, Paul		Darsch, Nancy	Musial, Mark
Allen, Vanessa	Content Management-P2	15		Allen, Vanessa		Boyce, Dorson		Parsons, Alan		Darsch, Nancy	
Allen, Vanessa	*ERP Upgrade	7		Allen, Vanessa	Edwards, James			Parsons, Alan	Devlen, Paula	Owens, Tom	
Allen, Vanessa	Develop New Module-Agile	21		Allen, Vanessa				Summers, Peter		Roche, Alan	
Allen, Vanessa	Content Management-P2	15		Allen, Vanessa		Boyce, Dorson		Parsons, Alan		Darsch, Nancy	
Allen, Vanessa	*ERP Upgrade	7		Allen, Vanessa	Edwards, James			Parsons, Alan	Devlen, Paula	Owens, Tom	
Allen, Vanessa	Develop New Module-Agile	21		Allen, Vanessa				Summers, Peter		Roche, Alan	

Project Final Report

Based on your filters, this report displays the project final report. It displays the project definition, project summary, project details, stage conclusions, team members, control plan tasks, project documentation, and custom fields.

Filter Parameters

You can filter on pull down status, initiative, project basics, organization hierarchy, project custom fields, and finances.

Output Parameters

You can select the report format, maximum number of rows to display per report, and if the output should be compressed. The available report formats are CSV, PDF and HTML.

Sample Report

Project Final Report	
Show Current Filters	
Project Name:	Database Migration
Project Manager	Baldwin, Emmett
Architect	
DBA	France, Kevin
DBA-Approval Required	
Project Sponsor	Parsons, Alan
Consultant	
Developer	
Graphics Designer	
Security Engineer	Bryant, Mark
Analyst	
Analyst-Approval Required	
Network Engineer	
QA/QC	
Project Number:	9
Initiative:	Information Technology
Project Manager:	Baldwin, Emmett
Phone:	Fax:
Start Date:	Jan/06/2014
Realization Date:	Not Closed
Final Report Approved by Project Manager: Baldwin, Emmett	
Signature	Date

Project Review Report

Based on your filters, this report displays the aggregate project review report. It displays the project name, project activities, analysis tools, issues, and custom fields.

Filter Parameters

You can filter on pull-down status, initiative, project basics, organization hierarchy, and project custom fields.

Output Parameters

You can select the report format, maximum number of rows to display per report, and if the output should be compressed. The available report formats are: CSV, HTML, and PDF.

Sample Report

Aggregate Project Review Report

Show Current Filters

Project Name

Database Migration

Project Manager

Baldwin, Emmett

Architect

DBA

France, Kevin

DBA-Approval Required

Project Sponsor

Parsons, Alan

Consultant

Developer

Graphics Designer

Security Engineer

Bryant, Mark

Analyst

Analyst-Approval Required

Network Engineer

QA/QC

Project Number

9

Initiative:

Information Technology

x = completed status

n/a = not applicable

T = Tools

1.0 Project Activities

Description	Type	Owner	Started	Due	Completed	Comments	Plan hours	Actual hours
initiate-Short	x T Phase		Jan/06/2014	Feb/03/2014	Mar/10/2014		0	0

Project Control Report

Based on your filters, this report displays the project control report.

Filter Parameters

You can filter on pull-down status, initiative, project basics, organization hierarchy, and project custom fields, classification fields.

Output Parameters

You can select the report format, maximum number of rows to display per report, and if the output should be compressed. The available report formats are: CSV, HTML, and PDF.

Sample Report

Control Plan Report

Show Current Filters

Project Name:

Database Migration

Initiative:

Information Technology

Project Manager

Baldwin, Emmett

Architect

DBA

France, Kevin

DBA-Approval Required

Project Sponsor

Parsons, Alan

Consultant

Developer

Graphics Designer

Security Engineer

Bryant, Mark

Analyst

Analyst-Approval Required

Network Engineer

QA/QC

Project Number:

9

Description

Responsible

Due Date

Status

No Control Plan Tasks have been entered for this project.

Project Name:

Receivables Dunning Upgrade

Initiative:

Information Technology

Project Manager

Allen, Pierce

Architect

DBA

DBA-Approval Required

Project Sponsor

Trumain, Paul

Consultant

Developer

Darsch, Nancy

Graphics Designer

Bryant, Mark

Project Notes Report

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

Filter Parameters

You can filter on pull-down status, initiative, project basics, organization hierarchy, and project custom fields.

Output Parameters

You can select the report format, maximum number of rows to display per report, and if the output should be compressed. The available report formats are: CSV, HTML, and PDF.

Sample Report

Project Notes Report			
Show Current Filters			
Project Name:	Database Migration		
Project Manager	Baldwin, Emmett		
Architect			
DBA	France, Kevin		
DBA-Approval Required			
Project Sponsor	Parsons, Alan		
Consultant			
Developer			
Graphics Designer			
Security Engineer	Bryant, Mark		
Analyst			
Analyst-Approval Required			
Network Engineer			
QA/QC			
Project Number:	9		
Initiative:	Information Technology		
Date	Entered By	Type	Notes
No notes have been entered for this project.			
Project Name:	Receivables Dunning Upgrade		
Project Manager	Allen, Pierce		
Architect			
DBA			
DBA-Approval Required			
Project Sponsor	Trumain, Paul		
Consultant			
Developer	Darsch, Nancy		
Graphics Designer	Musial, Mark		
Security Engineer	Baldwin, Doug		

Project Issues Report

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

Filter Parameters

You can filter on pull-down status, initiative, project basics, organization hierarchy, and project custom fields.

Output Parameters

You can select the report format, maximum number of rows to display per report, and if the output should be compressed. The available report formats are: CSV, HTML, and PDF.

Sample Report

Project Issues Report									
Show Current Filters									
Project Name:	Vendor Metrics and Scorecards								
Compliance Officer									
Project Sponsor									
Analyst	,								
Architect	,								
Consultant									
DBA	,								
Developer	,								
Engineer	,								
QA/QC Tester	,								
Project Manager	Smith, John								
Project Number:	99								
Initiative:	Financial Services								
Issue Name	Severity	Owner	Date Opened	Due Date	Completed Date	Contact	Status	Comments	
No Issues have been entered for this project.									
Project Name:	Online Funds Transfer								
Compliance Officer									
Project Sponsor	Boozer, Dan								
Analyst	Archers, Anne								
Architect	Jones, Lance								
Consultant									
DBA	Lawson, Elise								
Developer	Smythe, Kate								
Engineer	,								
QA/QC Tester	Covens, Bryan								
Project Manager	Smith, John								
Project Number:	98								
Initiative:	Financial Services								
Issue Name	Severity	Owner	Date Opened	Due Date	Completed Date	Contact	Status	Comments	
Builds behind schedule	High	Floorman Lori	Apr/29/2014	May/08/2014			Open	customer and bank builds delayed due to DF reporting requirements issues	
Project Name:	*Secure Credit Card								

Project Storyboard

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

Filter Parameters

You can filter on pull down status, initiative, project basics, project dates, organization hierarchy, project custom fields, finances, and storyboard.

Output Parameters

You can select the maximum number of projects to display and the report format. The available report format is MS PowerPoint.

Idea Evaluation Report

Based on your filters, this report displays the evaluation of all ideas in the system.

Filter Parameters

You can filter on pull down status, idea basics, organization hierarchy and idea custom fields.

Output Parameters

You can select the report format, maximum number of rows to display per report, and if the output should be compressed. The available report formats are CSV, PDF and HTML.

Sample Report

Idea Evaluation Reports								
Show Current Filters								
Idea Id	Idea Name	Weights-->	Financial Impac..	Customer Satisf..	Cultural Impact	Translatable	Ease of Complet..	Evaluation Score
1	Hong Kong Office Relocation		7.00	8.00	4.00	5.00	8.00	6.90
10	Website Rebuild		9.00	7.00	6.00	8.00	6.00	7.60
11	Market Research Database		8.00	6.00	4.00	8.00	4.00	6.40
12	Electronic Payroll for direct deposit and paycards		6.00	8.00	6.00	7.00	4.00	6.10
13	Ticket Management System		8.00	8.00	5.00	7.00	6.00	7.20
14	Travel & Expense Management System		6.00	8.00	5.00	8.00	6.00	6.50
15	EMS Retrofit		5.00	7.00	6.00	8.00	8.00	6.40
16	*Electronic Banking Catalog		7.00	9.00	7.00	5.00	8.00	7.70
18	New gym equipment for pilot plant		0.00	0.00	0.00	0.00	0.00	0.00
19	Idea 1		0.00	0.00	0.00	0.00	0.00	0.00

Showing Records 1 - 10 of 18 > >

Close

Proposal Evaluation Report

Based on your filters, this report displays the evaluation of all charters in the system.

Filter Parameters

You can filter on pull down status, initiative, proposal basics, classification fields, and organization hierarchy.

Output Parameters

You can select the report format and if the output should be compressed. The available report format choices are CSV, PDF and HTML.

Sample Report

Proposal Evaluation Reports														
Show Current Filters														
Initiative - Information Technology														
Project Request ID	Project Request Name	Weights -->	Benefits						Feasibility					
			Repeatable	Financial	Organizational	Product	Process	Total Score	Time	Technology	Organizational	Capability	Financial	Total Score
			20%	30%	10%	20%	20%		20%	30%	10%	20%	20%	
1	HR Homepage Banner Update		7	5	4	4	6	5.3	5	4	5	6	6	5.1
3	Customer Experience		0	0	0	0	0	0	0	0	0	0	0	0
4	Update for GL Journal Transfer		0	0	0	0	0	0	0	0	0	0	0	0
5	*Data Center Consolidation		0	0	0	0	0	0	0	0	0	0	0	0
6	*Database Migration		0	9	9	7	0	5	6	5	5	4	6	5.2
7	*Develop Smaller Arc Handset		0	6	0	0	0	1.8	0	0	0	0	0	0
8	*Implement ITFM		0	9	9	0	0	3.6	0	0	0	0	0	0
9	*eSignatures Solution		0	0	0	0	0	0	0	0	0	0	0	0
10	*ERP Upgrade		0	0	0	0	0	0	0	0	0	0	0	0
11	*Microfiche Conversion		0	0	0	0	0	0	0	0	0	0	0	0
12	*NV2 Project		0	0	0	0	0	0	0	0	0	0	0	0
13	*Content Management-P2		0	0	0	0	0	0	0	0	0	0	0	0
14	*DR/BCP Annual Test		9	9	9	5	7	7.8	7	7	7	7	7	7
15	*C83 Horn R&D		7	8	5	8	5	6.9	6	6	6	6	6	6
16	Data to Voice / Voice to Data		8	9	9	5	5	7.2	6	6	7	5	7	6.1
17	*Develop New Module-Agile		0	0	0	0	0	0	0	0	0	0	0	0
18	North Campus Wireless Upgrade		6	5	5	6	4	5.2	5	3	4	5	3	3.9
19	HR Systems Upgrade		8	8	8	5	9	7.6	7	6	5	5	6	5.9
20	West Campus Wireless Upgrade		4	5	6	6	7	5.5	6	4	3	4	5	4.5

Project Reports (Spreadsheet Reports)

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Project Finance Spreadsheet Report

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

Filter Parameters

You can filter on pull down status, initiative, project basics, classification fields, organization hierarchy, and finances.

Output Parameters

You can select the report format, the maximum rows per report, and compress output. The report output is in CSV format.

Sample Report

Project Finance Spreadsheet Report.csv [Read-Only]										
	A	B	C	D	E	F	G	H	I	J
1	Project Finance Detail Report									
2	Soft Dollar	Total								
3	All financials in USD									
4										
5	Category	Level 2 Category	Level 3 Category	M2	M3	M4	Fiscal Year	Q1_M1_1	Q1_M1_2	Q1_M1_3
6	2. Expenses	Non-Resource	Consulting	1		1	2014	10000	10000	10000
7	2. Expenses	Non-Resource	Travel	1		1	2014	2000	2000	2000
8	2. Expenses	Capital Resource	CapEx Standard	1		1	2014	16560	16560	16560
9	1. Benefits	Benefits	Benefits	0		1	2014			
10	Total						2014		28560	
11	2. Expenses	Operational Resource	OpEx Standard	1		1	2014	36800	36800	36800
12	Total						2014		36800	
13	2. Expenses	Team Finances	Standard Costs	1		1	2014	100000	100000	100000
14	1. Benefits	Benefits	Benefits	0		1	2014			
15	Total						2014		100000	
16	2. Expenses	Team Finances	Standard Costs	1		1	2014	80000	80000	80000
17	1. Benefits	Benefits	Benefits	0		1	2014			
18	Total						2014		80000	
19	2. Expenses	Team Finances	Standard Costs	1		1	2014	120000	120000	120000
20	2. Expenses	Operational Resource	OpEx Standard	1		1	2014	10400	10400	10400
21	1. Benefits	Benefits	Benefits	0		1	2014			
22	Total						2014		130400	
23	2. Expenses	Non-Resource	Hardware	1		1	2014			
24	2. Expenses	Capital Resource	CapEx Standard	1		1	2014			
25	2. Expenses	Operational Resource	OpEx Standard	1		1	2014	2160	2160	2160
26	1. Benefits	Benefits	Benefits	0		1	2014			
27	Total						2014		2160	

Project Detail Spreadsheet Report

This report displays a detailed project report. The report is displayed in Microsoft Excel. You must first download the template.

Filter Parameters

N/A

Output Parameters

The output is in CSV format.

Sample Report

	A	B	C	D	E	F	G	H	I
1	Project ID	Project Name	Status	Current Phase	Division	Department	Customer	Initial Forecast	Initial Forecast Ch
2	3	Data to Voice / Voice to Data	On Hold	Plan/Design-Short	Info Tech	Apps	Engineering	233,000.00	700,000.00
3	4	Customer Experience	Active	Execute/Control-Short	Info Tech	Apps	Sales	57,000.00	130,000.00
4	57	New Cover Attachment	Active		Finance	Cont Improvem	Engineering		
5	21	Develop New Module-Agile	Active	Sprint 1 - Agile	Info Tech	Apps	Sales	231,000.00	458,000.00
6	58	*Petroleum Supply Manageme	Active		Finance	Cont Improvem	Operations		
7	54	Approve to hire process	Active		Finance	Cont Improvem	Finance		
8	41	ADM History Refresh	Active	Execute/Control-Short	Info Tech	Apps	Operations	230,000.00	400,000.00
9	40	Content Management	Active	Plan/Design-Short	Info Tech	Operations	Corporate	125,000.00	300,000.00
10	76	Receivables Dunning Upgrade	Active	Execute/Control-Short	Info Tech	Operations	Finance	370,000.00	500,000.00
11	65	AR process improvement	Closed-In Realization		Finance	Cont Improvem	Finance		
12	66	Call Center Staffing Optimizati	Active		Finance	Cont Improvem	Sales		
13	67	Custom Order Assembly Proce	Active		Finance	Cont Improvem	Operations		
14	10	Develop Smaller Arc Handset	Active	Plan/Design-Short	Info Tech	Apps	Engineering	720,000.00	1,000,000.00
15	9	Database Migration	Active	Plan/Design-Short	Info Tech	Data	Operations	431,000.00	522,000.00
16	16	Customer Experience-P2	Active	Closing-P2	Info Tech	Apps	Sales	57,000.00	200,000.00
17	56	Supply Chain Parts Project	Active		Finance	Cont Improvem	Operations		
18	53	Customer Return & Restocking	Active		Finance	Cont Improvem	Operations		
19	38	NV2 Project	Active	Execute/Control-Short	Info Tech	Apps	Sales	536,000.00	721,000.00
20	2	C83 Horn R&D	Active	Plan/Design-Short	Info Tech	Apps	Engineering	333,000.00	500,000.00
21	12	eSignatures Solution	Active	Plan/Design-Short	Info Tech	Apps	Finance	237,000.00	333,000.00
22	14	Microfiche Conversion	Active	Plan/Design-Short	Info Tech	Operations	External	410,000.00	567,000.00
23	15	Content Management-P2	Active	Startup-P2	Info Tech	Operations	Corporate	231,000.00	400,000.00
24	6	Data Center Consolidation	Active	Plan/Design-Short	Info Tech	Data	Operations	567,000.00	722,000.00
25	7	*ERP Upgrade	Active	Close-Short	Info Tech	Apps	Corporate	722,000.00	899,000.00
26	1	DR/BCP Annual Test	Active	Implementation-ITIL	Info Tech	Operations	Operations	125,000.00	300,000.00
27	5	Update for GL Journal Transfer	Active	Initiate-Short	Info Tech	Operations	Finance	230,000.00	570,000.00

Financial Savings by Business Unit

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

Filter Parameters

You can filter on initiative and finances.

Output Parameters

You can select the report format and choose to compress the output. The output is in CSV format.

Sample Report

	A	B	C	D	E
1	ORACLE Instantis				
2	Department Project Savings Summary - 2014				
3					
4					
5	<u>Department/Project</u>		<u>Initiative</u>	<u>YTD</u>	<u>FY Forecast</u>
6	Cont Improvement	Finance			
7	65	AR process improvement	Continuous Improvement	-139,700	-191,200
8			Total Finance	-139,700	-191,200
9			Total Cont Improvement	-139,700	-191,200
10			Grand Total	-139,700	-191,200
11					
12	<i>Note: YTD is calculated from fiscal start month to finance lock month. All financials in USD</i>				
13					

Finance Aggregate Reports

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

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

Total

Group1

Category 1.1

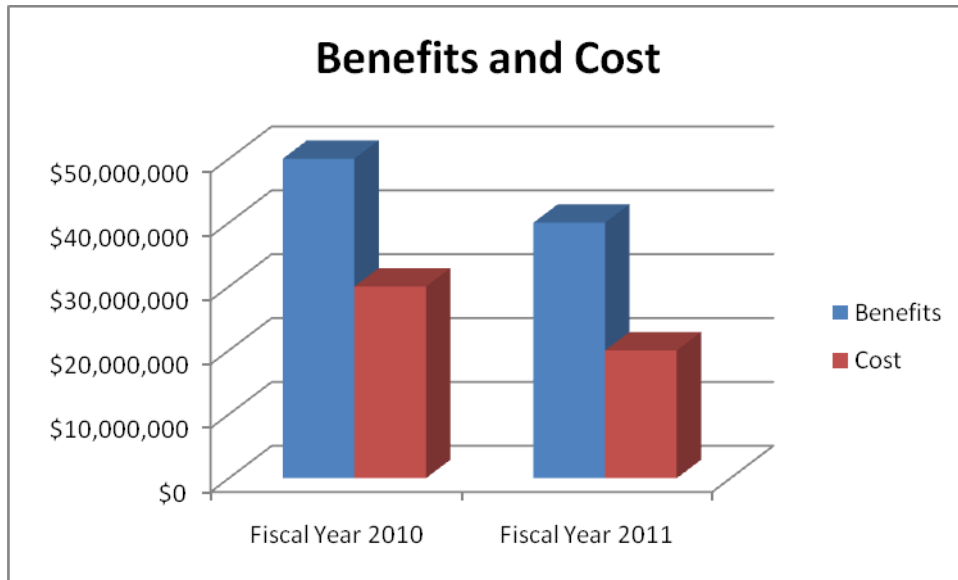
Element 1.1.1

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

Sample Report

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

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



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Project Finance Group Aggregate

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

It displays:

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

Filter Parameters

You can pull down status, initiative, project basics, project organization hierarchy, project dates, project classification fields, project custom fields, programs, finances, and finance aggregate definition.

Output Parameters

You can select the report format and choose to break down finance details by organization. The output is in CSV format.

Sample Report

Project Finances Group Aggregate.xls [Read-Only]													
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Project Id	Project Name	Initiative	Project St	Percent C	Type	Manager	Schedule	Project Ty	Division	Division C	Departme	Depart
2	33	Network Load Balancing	Information Technology	Active	16	Effort-based (Actual vs. Planned Effort for All Children)	Swords, C	PMBOK-SI	IT	Info Tech	10	Network	
3	6	Data Center Consolidation	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Forsythe, PMBOK-SI	IT		Info Tech	10	Data	10
4	7	*ERP Upgrade	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Allen, Var	PMBOK-SI	IT	Info Tech	10	Apps	20
5	10	Develop Smaller Arc Handset	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Neal, Ryan	PMBOK-SI	IT	Info Tech	10	Apps	20
6	9	Database Migration	Information Technology	Active	27	Effort-based (Actual vs. Planned Effort for All Children)	Baldwin, E	PMBOK-SI	IT	Info Tech	10	Data	10
		Customer Experience-P2				Effort-based (Actual vs. Planned Effort for All Children)							

Project Finances Element Aggregate

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

It displays:

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

Filter Parameters

You can pull down status, initiative, project basics, project organization hierarchy, project dates, project classification fields, project custom fields, programs, finances, and finance aggregate definition.

Output Parameters

You can select the report format and choose to break down finance details by organization. The report output format choices are CSV, HTML, and MS Excel.

Sample Report

Project Finances Element Aggregate.xls [Read-Only]										
	A	B	C	D	E	F	G	H	I	J
1	Project Id	Project Name	Initiative	Project Status	Percent Completion	Percent Completion Type	Manager	Schedule	Project Ty	Division
2	33	Network Load Balancing	Information Technology	Active	16	Effort-based (Actual vs. Planned Effort for All Children)	Swords, Carolyn	PMBOK-Short	IT	Info Tech
3	6	Data Center Consolidation	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Forsythe, John	PMBOK-Short	IT	Info Tech
4	7	*ERP Upgrade	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Allen, Vanessa	PMBOK-Short	IT	Info Tech
5	10	Develop Smaller Arc Handset	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Neal, Ryan	PMBOK-Short	IT	Info Tech
6	9	Database Migration	Information Technology	Active	27	Effort-based (Actual vs. Planned Effort for All Children)	Baldwin, Emmett	PMBOK-Short	IT	Info Tech
7	16	Customer Experience-P2	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Ferguson, Bruce	Prince2	IT	Info Tech
8	21	Develop New Module-Agile	Information Technology	Active	22	Effort-based (Actual vs. Planned Effort for All Children)	Allen, Vanessa	Agile	IT	Info Tech
11		Implement ITFM	Information Technology	Active		Effort-based (Actual vs. Planned Effort for All Children)	Bar...	P...	IT	Tech

Project Finances Element Monthly Detail

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

It displays:

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

Filter Parameters

You can pull down status, initiative, project basics, project organization hierarchy, project dates, project classification fields, project custom fields, programs, finances, and finance aggregate definition.

Output Parameters

You can select the starting month, number of months, report format and choose to break down finance details by organization. The report output format choices are CSV, HTML, and MS Excel.

Sample Report

Project Finances Element Monthly Detail.xls [Read-Only]											
	A	B	C	D	E	F	G	H	I	J	K
1	Project Id	Project Name	Initiative	Project Status	Percent Completion	Percent Completion Type	Manager	Schedule	Project Type	Division	Chargeback Code
2	33	Network Load Balancing	Information Technology	Active	16	Effort-based (Actual vs. Planned Effort for All Children)	Swords, Carolyn	PMBOK-Short	IT	Info Tech	10
3	6	Data Center Consolidation	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Forsythe, John	PMBOK-Short	IT	Info Tech	10
4	7	*ERP Upgrade	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Allen, Vanessa	PMBOK-Short	IT	Info Tech	10
5	10	Develop Smaller Arc Handset	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Neal, Ryan	PMBOK-Short	IT	Info Tech	10
6	9	Database Migration	Information Technology	Active	27	Effort-based (Actual vs. Planned Effort for All Children)	Baldwin, Emmet	PMBOK-Short	IT	Info Tech	10
7	16	Customer Experience-P2	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Ferguson, Bruce	Prince2	IT	Info Tech	10
8	21	Develop New Model Agile	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Allen, Vanessa	PMBOK-Short	IT	Info Tech	10

Resource Reports (Detail Reports)

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Resource Professional Certifications

Based on your filters, this report displays all the certificates received by resources.

Filter Parameters

You can filter on pull down status, initiative, resource basics, and organization hierarchy.

Output Parameters

You can select the primary output column to sort by, sort direction, maximum number of rows to display per report, and if the output should be compressed. The output choices are CSV, PDF and HTML.

Sample Report

Resource Profile Reports: Professional Certification																
Show Current Filters																
Adams, Don		Access Profile		Manager		Allen, Vanessa		Company Name		Business Phone		Cell Phone		Fax		
IT PM										405-255-4556		405-785-3211				
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training
Certification-1	PMP	PMP		Information Technology/Financial Services/Continuous Improvement/New Product Development	Mar/01/2012				Jan/01/2012			Info Tech				0
Allen, Vanessa		Access Profile		Manager		Adams, Don		Company Name		Business Phone		Cell Phone		Fax		
IT Management										+1-255-655-1212						
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training
Certification-1	PMP	PMP		Information Technology/Financial Services/Continuous Improvement/New Product Development		00						Info Tech				0
Booster, Dan		Access Profile		Manager		Smith, John		Company Name		Business Phone		Cell Phone		Fax		
FG PM																
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training
Certification-1	PMP	PMP		Information Technology/Financial Services/Continuous Improvement/New Product Development		1	Certified	Yes				Finance	M&A			0
Ives, Victoria		Access Profile		Manager		Allen, Vanessa		Company Name		Business Phone		Cell Phone		Fax		
GI Management																
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training
Certification-1	Master Black Belt Certified	Master Black Belt Certified		Information Technology/Financial Services/Continuous Improvement/New Product Development			Certified	Yes			Jan/15/2012	Finance	Cont Improvement		Global	0

Resource Expertise/Skills

Based on your filters, this report displays the skills and expertise the resources have.

Filter Parameters

You can filter on pull down status, initiative, resource basics, and organization hierarchy.

Output Parameters

You can select the primary output column to sort by, sort direction, maximum number of rows to display per report, and if the output should be compressed.

The output choices are CSV, PDF and HTML.

Sample Report

Resource Expertise/Skills Report								
Show Current Filters								
Name ▲	Resource Type	Resource Sub Type	Access Profile ▼	Manager	Department	Email	Initiative	Areas of Expertise
Adams, Don	Person	Employee	IT PM	Allen, Vanessa		pilot+dadams@oracle.com	Information Technology, Financial Services, Continuous Improvement, New Product Development	PM CertificationPM-1PM-2PM-3
Allen, Vanessa	Person	Employee	IT Management	Adams, Don		pilot+vallen@oracle.com	Information Technology, Financial Services, Continuous Improvement, New Product Development	PM CertificationPM-1PM-2PM-3
Allen, Pierce	Person	Employee	IT PM	Allen, Vanessa		pilot+pallen@oracle.com	Information Technology	PM-1PM-2PM-3
Anchors, Annie	Person	Employee	IT Resource	Allen, Vanessa		pilot+aanchors@oracle.com	Information Technology	BI-1BI-2BI-3Business RequirementsFunctional Requirements
Anderson, Dana	Person	Employee	NPD Management	Monroe, Pam	Consumer	pilot+danderson@oracle.com	Information Technology, Financial Services, Continuous Improvement, New Product Development	
Arnold, Trevor	Person	Employee	IT PM	Allen, Vanessa	Data	pilot+tarnold@oracle.com	Information Technology	PM-1PM-2PM-3
Baldwin, Emmett	Person	Employee	IT PM	Allen, Vanessa	Data	pilot+ebaldwin@oracle.com	Information Technology	DBA-OraclePM CertificationPM-1PM-2PM-3
Baldwin, Doug	Person	Employee	IT Resource	Allen, Vanessa		pilot+gbaldwin@oracle.com	Information Technology	CISSPCompliance AuditorPM CertificationPM-1PM-2PM-3Technical Management
Bales, Alison	Person	Employee	IT Resource	Allen, Vanessa		pilot+abales@oracle.com	Information Technology	BI-1BI-2BI-3Business RequirementsFunctional RequirementsTesting

Resource Assets

Based on your filters, this report displays all resource assets.

Filter Parameters

You can filter on pull down status, initiative, resource basics, and organization hierarchy.

Output Parameters

You can select the primary output column to sort by, sort direction, maximum number of rows to display per report, and if the output should be compressed. The output choices are CSV, PDF and HTML.

The output choices are CSV, PDF and HTML.

Sample Report

Resource Asset Report

Show Current Filters

Adams, Don

Access Profile

Title With All Access

Asset ID

Asset Type

Asset Description

Serial No.

Area Of Expertise

1

Printer

15467

SSMethodology Excel/2002

Allen, Vanessa

Access Profile

Title With All Access

Asset ID

Asset Type

Asset Description

Serial No.

Area Of Expertise

1

Laptop

110098709834

SSMethodology Excel/2002

Allen, Pierce

Access Profile

Title With All Access

Asset ID

Asset Type

Asset Description

Serial No.

Area Of Expertise

1

Fax Machine

98543

SSMethodology Excel/2002

Company Name

Business Phone

Cell Phone

Fax

Initiative

Instantis Inc

408-986-8800

408-986-8800

408-986-8472

Six Sigma,IT

Company Name

Business Phone

Cell Phone

Fax

Initiative

BussName Value

408-986-8800

408-986-8800

408-986-8472

IT

Company Name

Business Phone

Cell Phone

Fax

Initiative

Instantis Inc

408-986-8800

408-986-8800

408-986-8472

IT

Close

Heat Map by Resource

Based on your filters, this report displays a heat map by resource. It displays the resource/project, project count, planned effort for resources (PL), actual effort for resource (AC), planned utilization (PL/CP %), and the actual utilization (AC/CP %). For more information on the heat map thresholds used and a description of the column headers, click the **Legend** link. The cells highlighted in green indicate that the resource is under utilized, and cells highlighted in red indicate that the resource is overbooked.

Filter Parameters

You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project alignment tree, proposal basics, proposal classification fields, and proposal custom fields

Output Parameters

You can select the following filters:

- ▶ Display Filters: report format, maximum rows per report, rows per page, and hide rows with zero effect. The report format choices are CSV and HTML.
- ▶ Row Filters: display named resource, display TBD assignments, display projects, display proposals, display assigned allocations, display unassigned allocations, display activities, and display team/overhead.
- ▶ Column Filters: display project count, display capacity, display requested, display committed, display total demand, display percent allocations/approvals, display planned, display actual, and display percent utilization.

The output choices are CSV and HTML.

Sample Report

Heat Map By Resource

Show Current Filters

Legend



Resource/Project	Project Count	Nov/2014Nov 29 through Dec/2014								Jan/2015				Feb/2015				Mar/2015				Apr/2015				May/2015			
		PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)
		✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕	✕
 Adams, Don	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Allen, Pierce	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Allen, Vanessa	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Anchors, Annie	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Anderson, Dana	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Arnold, Trevor	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Baldwin, Emmett	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Baldwin, Doug	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Bales, Alison	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
 Barnes, Heidi	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

111

1234567

Heat Map by Role

Based on your filters, this report displays a heat map by resource roles. From the Filter tab, you must choose an Initiative before running this report. It displays the role/ resource/project, project count, planned effort for resources (PL), actual effort for resource (AC), planned utilization (PL/CP %), and the actual utilization (AC/CP %). For more information on the heat map thresholds used and a description of the column headers, click the **Legend** link. The cells highlighted in green indicate that the resource is under utilized, and cells highlighted in red indicate that the resource is overbooked.

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

Filter Parameters

You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project alignment tree, proposal basics, proposal classification fields, proposal organization hierarchy, and proposal custom fields

Output Parameters

You can select the following filters:

- ▶ Display Filters: report format, maximum rows per report, rows per page, and hide rows with zero effect. The report format choice is HTML.
- ▶ Row Filters: display named resource, display TBD assignments, display projects, display proposals, display assigned allocations, display unassigned allocations, display activities, and display team/overhead.
- ▶ Column Filters: display project count, display capacity, display requested, display committed, display total demand, display percent allocations/approvals, display planned, display actual, and display percent utilization.

The report output format is HTML.

Sample Report

Heat Map By Role

[Show Current Filters](#)
[Legend](#)

Role/Resource/Project	Project Count	Dec/2014(Dec 12 through Dec 14)						Feb/2015				Mar/2015				Apr/2015			
		PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC
Consultant	9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Project Manager	27	8.00	43.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
DBA	8	16.00	43.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Security Engineer	8	8.00	43.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Project Sponsor	24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Architect	11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Release Manager	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Team Member	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
QA/QC	9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Analyst	12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total		32.00				0.00				0.00				0.00				0.00	

1 2 3

Heat Map by Role

Based on your filters, this report displays a heat map by project. It displays the project/resource, resource count, planned effort for resources (PL), actual effort for resource (AC), planned utilization (PL/CP %), and the actual utilization (AC/CP %). For more information on the heat map thresholds used and a description of the column headers, click the **Legend** link. If your report has a cell highlighted in orange, it indicates that the committed effort as a percentage of capacity for the activity is in the mid-range. If a cell is highlighted in red, it indicates that the activity's planned utilization is very high, and cells highlighted in green indicate very low utilization.

Filter Parameters

You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project alignment tree, proposal basics, proposal classification fields, proposal organization hierarchy, and proposal custom fields

Output Parameters

You can select the following filters:

- ▶ Display Filters: report format, maximum rows per report, rows per page, and hide rows with zero effect. The report format choice is HTML.
- ▶ Row Filters: display named resource, display TBD assignments, display projects, display proposals, display assigned allocations, display unassigned allocations, display activities, and display team/overhead.

- ▶ Column Filters: display project count, display capacity, display requested, display committed, display total demand, display percent allocations/approvals, display planned, display actual, and display percent utilization.

The report format choice is HTML.

Sample Report

Heat Map By Project

Show Current Filters

Legend

Project/Resource	Resource Count	Type	Nov/2014 (Nov 29 through Dec/2014				Jan/2015				Feb/2015				Mar/2015				Apr/2015				May/2015					
			PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)	PL	AC	PL/CF (%)	AC/CF (%)		
Projects	128		0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00
Project Requests	11		0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.00
Total			0.00				0.00			0.00			0.00		0.00			0.00		0.00			0.00			0.00		

1

Resource Utilization Chart

Based on your filters, this report displays the resource utilization. It shows the planned utilization % and the actual utilization % for all resources.

Filter Parameters

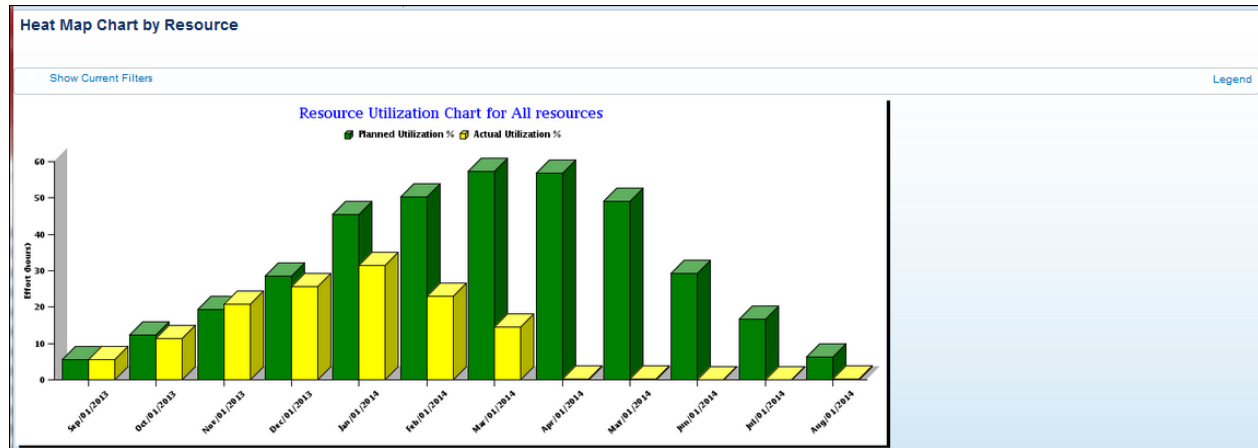
You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project alignment tree, proposal basics, proposal classification fields, proposal organization hierarchy, and proposal custom fields

Output Parameters

You can select the following filters:

- ▶ Display Filters: report format, maximum rows per report, compress output, and display resource level chart. The report format is HTML.
- ▶ Chart Filters: display % utilization, display planned, display actual, and display capacity.

Sample Report



Project Effort Chart

Based on your filters, this report displays project effort by project. It shows the planned and the actual effort.

Filter Parameters

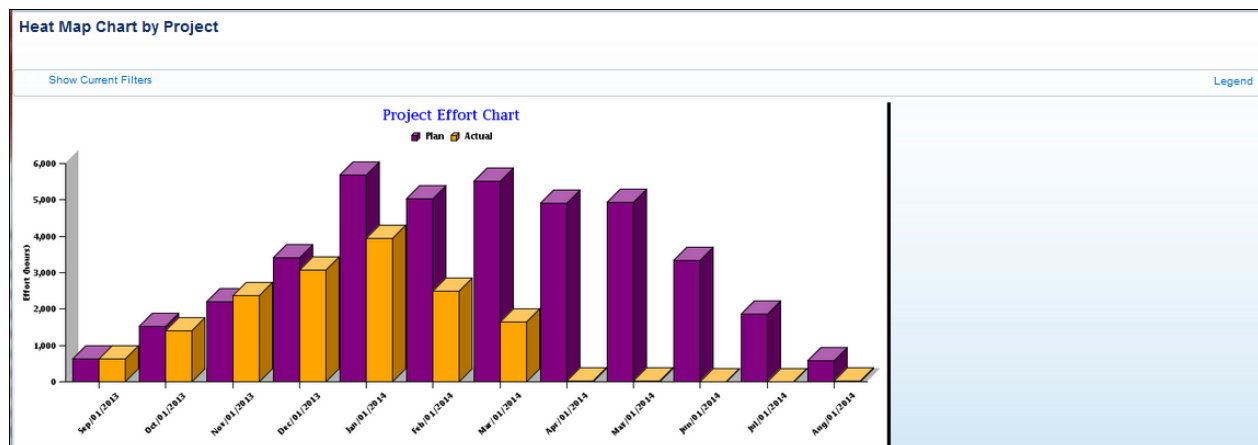
You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project alignment tree, proposal basics, proposal classification fields, proposal organization hierarchy, and proposal custom fields

Output Parameters

You can select the following output filters:

- ▶ Display Filters: report format, maximum rows per report, and compress output. The report format is HTML.
- ▶ Chart Filters: display planned, and display actual.

Sample Report



Heat Map by Resource CSV

Based on your filters, this report displays a heat map by resource.

Filter Parameters

You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project alignment tree, proposal basics, proposal classification fields, proposal organization hierarchy, proposal custom fields, and program.

Output Parameters

You can select the following filters:

- ▶ Display Filters: report format, maximum rows per report, and hide rows with zero effect. The report format choices are CSV, XLS, and HTML.
- ▶ Row Filters: display named resource, display TBD assignments, display projects, display proposals, display assigned allocations, display unassigned allocations, display activities, and display team/overhead.
- ▶ Column Filters: display project count, display capacity, display requested, display committed, display total demand, display percent allocations/approvals, display planned, display actual, and display percent utilization.

The output choices are CSV, XLS, and HTML.

Sample Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
		Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Nov-14	Dec-14	Dec-14	Dec-14
1	Resource/Project	Project Count	CP	RQ	CM	TD	RQ/CP (%)	CM/CP (%)	TD/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	CP	RQ	CM
2	Adams, Don	5	0	0	0	0	0	0	0	0	0	0	0	0	184	0
3	Adams, Don - Projects	4			0	0	0	0	0	0	0	0	0	0	0	184
4	Adams, Don - Projects - Customer Experience				0	0	0	0	0	0	0	0	0	0	0	
5	Adams, Don - Projects - Customer Experience - Activities										0	0	0	0		
6	Adams, Don - Projects - Customer Experience - Activities - Initiate Activities										0	0	0	0		
7	Adams, Don - Projects - Customer Experience - Activities - Planning Design Activities										0	0	0	0		
8	Adams, Don - Projects - Customer Experience - Activities - Execute/Control Activities										0	0	0	0		
9	Adams, Don - Projects - Customer Experience - Activities - Close Activities										0	0	0	0		
10	Adams, Don - Projects - Customer Experience - Allocations				0	0	0	0	0	0					0	0
11	Adams, Don - Projects - Customer Experience - Team Overhead										0	0	0			

Heat Map Legends

▶ CP(hours)

Resource Capacity. The number of working hours per week by a resource divided by the number of working days per week.

Example: If a user works 40 hours a week, there are 5 work days in a week and 22 working days in a month, then the capacity for the resource for that month is $40/5 * 22 = 176$ hours. Resource capacity is fixed and the number of work days in EnterpriseTrack is fixed at 5. General calendar holidays and non-working days do not affect resource capacity.

▶ **RQ(hours)**

Pending/Unapproved Requested Effort for Resources. It is the sum of the demand for a role or resource in the form of allocations from projects.

▶ **CM(hours)**

Approved/Committed Effort for Resources. When Requested Effort (RQ) is approved it becomes Committed Effort and RQ can be approved is full or partial. If a resource role doesn't require an approved then as soon as effort is allocated it becomes committed effort.

▶ **TD(hours)**

Total Demand (RQ+CM). It is the sum of Requested Effort (RQ) for a role or resource and the Committed Effort (CM).

▶ **RQ/CP(Percent)**

Requested Effort as a percent of Capacity.

▶ **CM/CP(Percent)**

Committed Effort as a percent of Capacity.

▶ **TD/CP(Percent)**

Total Demand as a percent of Capacity.

▶ **PL(hours)**

Planned Effort for Resources. The sum of an individual resource's planned effort for each assigned task for a given time period. It is not double-counted when rolled up by resource or role.

Example: If John Smith plans to work 110 hours as a DBA and 40hrs as a Unix Administrator for the month of January, then the PL for John for the month of January is $110 + 40 = 150$ hrs. If Mary Jane plans to work 100 hrs. as a DBA in the month of January then the PL for DBA is $110 + 100 = 210$ hrs. The PL for Mary is 100 hrs. The PL for Unix Administrator is 40 hrs.

▶ **AC(hours)**

Actual Effort. The sum of the actual effort by a resource for a given time period. This can come from timesheets. No double counting is done when rolled up by resource or role.

Example: If John Smith has worked 93 hrs. as a DBA and 45 hrs. as a Unix Administrator in January, then the AC for John is $93 + 45 = 138$ hrs. If Mary Jane worked 97 hrs. as DBA in January, then the AC for Mary is 97. The AC for DBA is $93 + 97 = 190$ and the AC for Unix Administrator is 45.

▶ **PL/CP(Percent)**

Planned Utilization.

▶ **AC/CP(Percent)**

Actual Utilization.

Timesheet Reports

Timesheet Report by Project

Based on your filters, this report displays timesheet reports by projects. It displays the project name, role, team member, activities, the number of hours reported on timesheet, total hours, rate, and cost. If the date range is one week or less, the generated report provides a detailed view for each day of the week. If the date range is more than a week, the generated report displays a summarized view for the entire period.

Filter Parameters

You can filter on pull down status, initiative, project basics, timesheet basics, organization hierarchy, and finances.

Output Parameters

You can choose to compress the output, display cost, display project overhead categories and activity details, and hide rows with zero effect. The available report format choices are: CSV, PDF and HTML.

Sample Report

Timesheet Report by Project											
Show Current Filters											
Project Name	Role	Team Member	Sunday Dec/07/2014	Monday Dec/08/2014	Tuesday Dec/09/2014	Wednesday Dec/10/2014	Thursday Dec/11/2014	Friday Dec/12/2014	Saturday Dec/13/2014	Total Dec/07/2014 - Dec/13/2014	Rate USD
Approve to hire process			0	2	3	4	5	6	0	20	
	Project Manager	Vardakis, Lucie	0	0	0	0	0	0	0	0	\$100
	Master Black Belt	Aldridge, Mike	0	2	3	4	5	6	0	20	\$100
	Black Belt	Vardakis, Lucie	0	0	0	0	0	0	0	0	\$100
	Champion	Goldberg, Larry	0	0	0	0	0	0	0	0	\$100
	Process Owner	Colmenares, Carlos	0	0	0	0	0	0	0	0	\$100
	Finance Validator	Parker, Eloise	0	0	0	0	0	0	0	0	\$100
Manufacturing Line Disruptions			0	0	0	0	0	0	0	0	
	Project Manager	Newton, Brittany	0	0	0	0	0	0	0	0	\$100
	Master Black Belt	Aldridge, Mike	0	0	0	0	0	0	0	0	\$100
	Green Belt	Newton, Brittany	0	0	0	0	0	0	0	0	\$100
	Champion	Monnson, Kevin	0	0	0	0	0	0	0	0	\$100
	Process Owner	Bailey, Steve	0	0	0	0	0	0	0	0	\$100

Timesheet Report by Resource

Based on your filters, this report displays timesheet report by resource. It shows the resource name, project name, role, activities, the number of hours reported on timesheet, total hours, rate, and cost.

Filter Parameters

You can filter on pull down status, initiative, resource basics, resource filterable custom fields, organization hierarchy, timesheet basics, and finances.

Output Parameters

You can choose to compress the output, display cost, display project overhead categories and activity details, display non project overhead categories, and hide rows with zero effect. The available report

The available report format choices are: CSV, PDF and HTML.

Sample Report

Timesheet Report by Resource											
Show Current Filters											
Resource Name	Project Name	Role	Sunday Dec/07/2014	Monday Dec/08/2014	Tuesday Dec/09/2014	Wednesday Dec/10/2014	Thursday Dec/11/2014	Friday Dec/12/2014	Saturday Dec/13/2014	Total Dec/07/2014 - Dec/13/2014	Rate USD
Aldridge, Mike			0	2	3	4	5	6	0	20	
	Approve to hire process		0	2	3	4	5	6	0	20	
		Master Black Belt	0	2	3	4	5	6	0	20	\$100
	Inter-company Invoicing2		0	0	0	0	0	0	0	0	
		Master Black Belt	0	0	0	0	0	0	0	0	\$100
	Manufacturing Line Disruptions		0	0	0	0	0	0	0	0	
		Master Black Belt	0	0	0	0	0	0	0	0	\$100
	Services levels improvement		0	0	0	0	0	0	0	0	
		Master Black Belt	0	0	0	0	0	0	0	0	\$100
	Overhead		0	0	0	0	0	0	0	0	
Total			0	2	3	4	5	6	0	20	
Close											

Timesheet Detail Report

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

Notes:

- The Total Plan Effort column in this report is an information only column and the value will be the whole plan effort at activity level. This value may be repeated when the report is run to show the breakdown at day level, in such cases care should be taken not to double count the plan effort.
- The cost data is shown only for users that have the required permissions to view cost information.

- The resource rates are picked for the rate at assignment level. For non-project time and non-working time the standard rate at the resource level is used.
- If the correction dates are specified, the output will display correction reports. If correction dates are not specified, the output will display timesheet time and cost. If both correction dates and timesheet dates are specified, the corrections reported will be for the timesheets filed within the specified timesheet dates.
- If the resource plays more than one role in a project or an activity, the time reported from the timesheet will be equally distributed among all the roles and then costed with the respective role rate.

Filter Parameters

You can filter by Pull-down Status, Initiative, Timesheet Basics, Correction Date Range, Project Basics, Project Organization Hierarchy, Resource Basics, Resource Organization Hierarchy, Resource Filterable Custom Fields, Finances, Program, and Output Custom Fields.

Output Parameters

You can also set the following output filters: Compress Output, Show Cost, Show Project Overhead Categories, Show Activity Details Show Non-project Categories, Include disabled Time Reporting Categories, Show Actual Effort breakdown at day level, and Suppress rows where Actual Total Effort is zero. If you select the *Show Actual Effort breakdown at day level* option, the report displays the actual effort by resource assignment for each day. Leave this option unchecked to view actual effort aggregated for the selected time period.

The output choices are CSV, PDF, and HTML with compression.

Sample Report

Timesheet_Detail_Report.xlsx													
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Initiative	Division	Division C	Departme	Departme	Customer	Customer	Region	Region Ch	Project Id	Project Name	Project Manager	Project
2	Information Technology	Info Tech	10	Operations		Corporate		NA	20	15	Content Manage	Allen, Vanessa	IT
3	Information Technology	Info Tech	10	Apps	20	Sales		Global		16	Customer Experi	Ferguson, Bruce	IT
4	Information Technology	Info Tech	10	Apps	20	Sales		Global		16	Customer Experi	Ferguson, Bruce	IT
5	Information Technology	Info Tech	10	Apps	20	Sales		NA	20	21	Develop New M	Allen, Vanessa	IT
6	Information Technology	Info Tech	10	Apps	20	Sales		NA	20	21	Develop New M	Allen, Vanessa	IT
7	Information Technology	Info Tech	10	Apps	20	Sales		NA	20	21	Develop New M	Allen, Vanessa	IT
8	Information Technology	Info Tech	10	Apps	20	Sales		NA	20	21	Develop New M	Allen, Vanessa	IT
9	Information Technology	Info Tech	10	Apps	20	Sales		NA	20	21	Develop New M	Allen, Vanessa	IT
10	Information Technology	Info Tech	10	Apps	20	Sales		NA	20	21	Develop New M	Allen, Vanessa	IT
11	Information Technology	Info Tech	10	Apps	20	Corporate		Global		7	*ERP Upgrade	Allen, Vanessa	IT
12	Information Technology	Info Tech	10	Apps	20	Corporate		Global		7	*ERP Upgrade	Allen, Vanessa	IT
13	Continuous Improvement	Finance	20	Cont Improvment		Finance		Global		54	Approve to Hire	Vandakis, Lorie	Sigma

User Defined Excel Reports

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

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

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

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Creating User-Defined Reports

To create User-Defined Reports, do the following:

- 1) Navigate to Standard Reports by selecting **Go To >Reports >Standard** from the Top Navigation bar.
- 2) From the **Tree** pane, select the **My Report** folder and select any reports sub-folder underneath. If you don't have a sub-folder underneath the My Report folder, then you must first create a sub-folder. For example, you can create a sub-folder called Excel-Based Report.
- 3) From the **List** pane, click the  **Create User-Defined Report** button, and choose **User-Defined Excel Report**.
- 4) From the **General** tab enter a name for the report.
- 5) From the **Data Source** tab, you can add, or delete one or more Ad-hoc templates or you can select any of the available Standard Report templates. The Standard Reports that are displayed are the ones that have a tabular output. Most reports do, but those that have only a PDF output are not shown in the list of available reports.

Notes:

- You must choose a report that does not require any parameters at run-time. The report should produce an output without setting any parameters.
- It is recommended that you make a copy of the Standard Report that you want to use as a data feed into your My Reports folder. This way you can set all necessary parameters that the Standard Report may need. If you are using Ad-hoc reports, you should similarly ensure that the reports do not require any input parameters

- 6) Enter a name, select a source template, and enter an Order ID. You can click on the **Add More** link to add more source templates. This name will become the name of the tab in the output Excel report
- 7) The **Source** is where you specify the Ad-hoc or Standard report templates that will be used as the data source to feed into your Report Template. You can have several sources of Ad-hoc or Standard reports.
- 8) From the **Output** tab select the report format (XLS or ZIP). Select if you want to edit the parameters during runtime.
- 9) Click ► **Run Report**.
You can open the report in Excel and add your own tabs. Your tabs can contain any Excel formulas, coloring, borders, text, charts, pivot tables and even Macros. These can refer to cells in the EnterpriseTrack data feed tabs.

Note: You should not make any changes or edits to the tabs fed from EnterpriseTrack – these will be lost in a subsequent run of the report. You can however make any number of your own tabs. These tabs can have formulas that refer to the tabs of data fed by EnterpriseTrack. In this way you can create any arbitrary Excel output you wish. Note that when you refer to data ranges in the data tabs from EnterpriseTrack, you should know that there may be fewer or more rows in each run of the report depending on the underlying data set chosen. This can often be handled by just naming the column of data as the range in the Excel formula (e.g. A: A or C: C).

- 10) From the **Details** tab, click on the **General** tab and upload the file you created in the previous step as the Report template. This template will then be populated at the next execution of the report, with the latest data. If you wish to change the template by modifying its appearance or any formulas, you can re-upload the modified template at any time.
- 11) From the **Output** tab select the report format (XLS or ZIP). Select if you want to edit the parameters during runtime.
- 12) Click the **Save** button.

Ad-Hoc Reports

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

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

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Managing Ad-Hoc Reports

You can edit the predefined templates by specifying the parameter values, selecting the columns to display, and specifying the sort orders. You can also view saved templates created by other users by changing the filter criteria.

Editing Templates

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

General Tab

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

Parameters Tab

Select the parameters and their values. You can choose to edit the parameter at runtime.

Column Selection Tab

Select the columns you want to display. Click the right or left buttons to select/omit columns from the report. You can also use the **Move Up** and **Move Down** buttons to change the order of the selected columns.

Column Details Tab

Select the column name and enter a description.

Sorting Tab

Select the sorting order for the columns.

Run Test Report

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

Copying Templates

To copy an existing template:

- 1) Click the **[Edit]** link next to the template you want to copy.
- 2) Click on the tabs to modify the report and
- 3) Click the **Save As...** button.
- 4) Enter a name and description for this report.
- 5) Select if you want publish this report.
- 6) Click **Save**.

To set filters:

- 1) Click the **More Filters...** button.
- 2) Select the scope, and enter the filter criteria.
- 3) Click the **Apply**.

To run an Ad-hoc report:

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

List of Ad-Hoc Reports

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

Report Name	Description/Purpose
Asset Listing Report	Get all the asset related information for all resources.
Charter Template	A template for charter reports.
Executive Notes Listing Template	Lists all executive notes.
Finance Validation Report Template	Display finance validation data.
Idea Template	A template for idea reports.
Issues Listing Report	Lists issues in all projects.
Metrics Listing Report	Get all the metrics related information for all projects.
Program Template	A template for program reports.
Project & Metrics Template	This template combines project and metrics data.
Project Listing Report	Displays project details including a list of key team members.

Report Name	Description/Purpose
Project Template	A template for project reports.
Charter Team Member Listing Report	Lists all charter team members.
Resource Certification Listing Report	Lists all certifications taken by resources.
Resource Template	A temple for resource reports.
Role Based Permission List	Lists all role based permissions.
Team Member Listing Report	Lists all team members.
Title Based Permission List	Display all title based permission mapping.

For More Information

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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
<i>EnterpriseTrack User Help</i>	Describes how to work with EnterpriseTrack and provides information to assist users with using EnterpriseTrack features. All users should read this Help.
<i>EnterpriseTrack Administrator's Help</i>	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.
<i>EnterpriseTrack User Guide</i>	Guides users on how to use the EnterpriseTrack application. All users should read this guide.
<i>EnterpriseTrack Administrator's Guide</i>	Provides detailed information on using the EnterpriseTrack Administrator's console. EnterpriseTrack administrator should read this guide.
<i>EnterpriseTrack Dashboards User's Guide</i>	Provides detailed instruction on using the EnterpriseTrack Dashboards modules to view and generate dashboards. All users should read this guide.
<i>EnterpriseTrack Reports User's Guide</i>	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.
<i>EnterpriseTrack Quick Reference Guide</i>	Provides a quick introduction to common EnterpriseTrack tasks. All users should read this guide.
<i>EnterpriseTrack Installation Guide</i>	Provides information on how to install and configure EnterpriseTrack. EnterpriseTrack administrator, network administrator and database administrator should read this guide.
<i>EnterpriseTrack MSP Integration Guide</i>	Provides an overview of MS Project integration for EnterpriseTrack. EnterpriseTrack users who will perform MS Project integration should read this guide.
<i>EnterpriseTrack API Integration Guide</i>	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
<i>EnterpriseTrack Upgrade Guide</i>	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.
<i>EnterpriseTrack Architecture Data Sheet</i>	Provides the server system requirements and the deployment configuration options for EnterpriseTrack.
<i>EnterpriseTrack Tested Configurations</i>	Lists the configurations that have been tested and verified to work with EnterpriseTrack. EnterpriseTrack administrator, network administrator, and database administrator should read this guide.
<i>EnterpriseTrack Cumulative Features Overview Tool</i>	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.
<i>EnterpriseTrack Security Guide</i>	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.
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- ▶ **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>.

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Oracle Instantis EnterpriseTrack Reports User's Guide

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