



**Dashboard User Guide  
16 R1**

June 2016



# Contents

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About Dashboards .....	5
Navigating to the Dashboards Module .....	5
Working with Dashboards.....	5
Viewing Dashboards.....	5
Selecting Dashboards.....	6
Components in the Dashboard .....	6
Mouse-Over.....	7
Drill-Down.....	7
Using In-Line Filters.....	7
Modifying Filters and Display Options.....	7
Managing Dashboards.....	9
Creating a New Dashboard.....	9
Setting Dashboard Component Filters and Display Options.....	10
Working with Project Bubble Charts .....	11
Selecting the Filter and Display Options .....	13
Copying, Pasting or Deleting Dashboards .....	13
Sharing Dashboards.....	14
Available Dashboard Components .....	14
Alignment (Strategy).....	14
Proposals (Charters) .....	16
Ideas.....	17
Projects (Subcategory: General).....	18
Projects (Subcategory: Count) .....	22
Projects (Subcategory: Cycle Time) .....	25
Projects (Subcategory: Finances).....	29
Projects (Subcategory: Metrics).....	33
Resource.....	34
Where to Get Documentation .....	38
Documentation Accessibility.....	38
Where to Get Training.....	38
Where to Get Support.....	39
Legal Notices .....	41



# About Dashboards



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

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

# Navigating to the Dashboards Module

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To navigate to the **Dashboards** module: from the Top Navigation bar, select **Go To >  Dashboards > View**, or from the Left Navigation bar, select ** Dashboards**.

# Working with Dashboards

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## In This Section

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Viewing Dashboards .....	5
Managing Dashboards .....	9
Sharing Dashboards.....	14

## Viewing Dashboards

To view dashboards:

- 1) From the Top Navigation bar, select **Go To >  Dashboards > View**. Your default dashboard is displayed.
- 2) Use the **Select Dashboards** pull-down menu, to select the type of dashboard you want to view.

## Selecting Dashboards

From the **Select Dashboard** pull-down menu, you can view the list of available dashboards. The dashboards are grouped with individual canvases under each group.

- ▶ **My Dashboards**

Displays the dashboards that you have created.

- ▶ **Shared Dashboards**

Displays the dashboards that have been shared. You can copy and modify the shared dashboard.

- ▶ **Pre-defined Dashboards**

These dashboards are predefined in the system.

- ▶ **Executive Dashboard**

Displays four high level visual reports:

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

- ▶ **Project Dashboard**

Displays dashboards based on your project association.



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






- ▶ **Global Dashboards**

These dashboards can be viewed by all dashboard users.

## Components in the Dashboard

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

Icons	Description
	Click to open the Inline Filter box. Inline Filters provide instant access to some of the most commonly used filter fields. Inline Filters are simple to use. For more information, see topic Using In-Line Filters.
	Click to set filters and display options for each component.

Icons	Description
	Click to save a dashboard as a PDF file.
 	Click to maximize the component screen. Click to minimize the component screen.
	Click to refresh the component.
	Click for a description of the component.


### Mouse-Over

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

### Drill-Down


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

## Using In-Line Filters

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

### Modifying the In-line Filters

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




- 1) From **My Dashboards**, select a dashboard component you want to modify.
- 2) Click the **Inline Filters**  icon.
- 3) Change the filters you want to modify and click the **Apply** button. The dashboard component is updated based on the filters you selected. When you select **Apply**, the change to the filter settings are applied only for this session and is not remembered for the next time you display this dashboard. You can select **Save** to save these filter settings such that future displays of this component will use the new settings to begin with.

## Modifying Filters and Display Options

You can modify the filters, display options, and chart display options for each dashboard component.

### Changing Dashboard Component Filters




To change dashboard component filters, do the following:

- 1) From the top banner of the component, click the  **Edit Filters and Display Options** button.
- 2) From the **Filters** tab, click the  **Expand All** button to expand the filter categories. You can select the  **Collapse All** button to collapse the list. The filter list is either expanded or collapsed based on the settings selected by your Administrator.
- 3) Make the necessary changes and click the **Apply** button to set these filters for the current run of the component, or click the **Save** button to save the filter settings for future use.

### Changing Display Options

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

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

- 1) From the top banner of the dashboard, click the  **Edit Filter and Display Options** button.
- 2) Click the **General Display Options** tab.
- 3) Click the  **Expand All** button to expand the categories. You can select the  **Collapse All** button to collapse the list. The list is either expanded or collapsed based on the settings selected by your Administrator.
- 4) Select a default font and text size.
- 5) From the color table, select a color from the drop-down menu and click on the **Add** button. The colors displayed are the colors used to create your dashboard. Click on the right or left arrow buttons to rearrange the color selection order. Click **Remove** to remove that color from the color table.
- 6) Enter a name to display on the Header, Vertical Axis Title, Horizontal Axis Title, and Footer.
- 7) Choose a font, font size, alignment, font color, and background color. You can also choose to disable the Header, Vertical Axis, Horizontal Axis and Footer by clicking the **Disable** box.
- 8) Make the necessary changes and click the **Apply** button to set these options for the current run of the component, or click the **Save** button to save the settings for future use.

### Changing Chart Display Options




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

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

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


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



- 4) Select the type of chart (Bar or Line). Select the type of bar chart (Stack Bars, Group Bars, or Row Bars), Line chart (Row Lines, Stack Lines, or Percent Lines), or Pie chart.
- 5) The options you see may vary based on the type of chart you chose. Make the necessary changes and click the **Apply** button to set these options for the current run of the component, or click the **Save** button to save the chart settings for future use.



## Managing Dashboards

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


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

## Creating a New Dashboard

Follow the steps below to create a new dashboard.

- 1) Navigate to the **Manage Dashboard** screen by selecting **Go To > Dashboards > Manage** from the Top Navigation bar. If you are already viewing a dashboard, click on the  **Manage** icon.
- 2) From the **Tree** pane, select the **My Dashboard folder** and click on the  **Add** icon. All new dashboards must be created under the *My Dashboard* folder. The system creates a folder (New) under *My Dashboards*.
- 3) In the **Details** pane, enter the following information:
  - a. Enter a name for this dashboard.
  - b. Choose if you want this dashboard to be active. Only active dashboards can be run.
  - c. Enter a description for this dashboard.
  - d. Select if you want this to be your default dashboard. If you select **Yes**, then this dashboard is displayed when you select **My Dashboards** from the Top Navigation bar or the Left Navigation bar.
- 4) Click **Save**.

## Selecting Components and Customizing Layouts





- 1) From the **Tree** pane, select the dashboard you created.
- 2) Click the  **Edit** button in **List** pane.

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

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The *Edit Dashboard* screen is displayed. The *Edit Dashboard* screen allows you to create custom dashboard by using the drag-and-drop feature to select components from the layout gallery.

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


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### Setting Dashboard Component Filters and Display Options

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

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

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

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

- 4) From the **Details** pane click the **General Display Options** tab.
- 5) Click the **Edit** button to edit the general display options. Check the **Visible** checkbox if you want the dashboard user to view this parameter on *Edit Filters and Display Options* page. Check the **Editable** box if you want to allow the dashboard user to edit this parameter.
- 6) From the **Details** pane click the **Chart Display Options** tab.
- 7) Click the **Edit** button to edit the chart display options. Check the **Visible** checkbox if you want the dashboard user to view this parameter on *Edit Filters and Display Options* page. Check the **Editable** box if you want to allow the dashboard user to edit this parameter.
- 8) Click the **Save** button when you are finished making edits to the component filters and display settings.

### Working with Project Bubble Charts

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

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

The following is a list of all available parameter options:

- ▶ Organization – Division
- ▶ Organization – Business Unit
- ▶ Organization – Location
- ▶ Organization – Region
- ▶ Classification – Functional Area
- ▶ Classification – Process Area
- ▶ Classification – Project Source
- ▶ Programs
- ▶ Risk
- ▶ Plan Effort
- ▶ Actual Effort
- ▶ % Completion
- ▶ Project Status
- ▶ Number of Open Issues
- ▶ Number of Closed Issues
- ▶ Number of Open Activities
- ▶ Number of Closed Activities
- ▶ Project Duration
- ▶ Initial Planned Duration
- ▶ Current Planned Duration
- ▶ Actual Duration

- ▶ Current Stage
- ▶ Project End Date
- ▶ Initial Planned Project Start Date
- ▶ Initial Planned Project End Date
- ▶ Current Planned Project Start Date
- ▶ Current Planned Project End Date
- ▶ Actual Project Start Date
- ▶ Actual Project End Date
- ▶ Strategies
- ▶ Scorecards
- ▶ Processes
- ▶ Program
- ▶ Finance Aggregate
- ▶ Project Tracking Details
- ▶ Project Type
- ▶ Roadmap
- ▶ Project Manager



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

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

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

### Creating a Project Bubble Chart

To create a project bubble chart, do the following:

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



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


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- 4) From the **Category** pull-down menu, select **Projects**. From the Subcategory pull-down menu select **General**.
- 5) Select the **Project Bubble Chart** dashboard components from the gallery and drag it into the layout grid.
- 6) Click the **Save Layout** button to save your dashboard layout.

## Selecting the Filter and Display Options

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



## Swapping X-Axis and Y-Axis

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

## Copying, Pasting or Deleting Dashboards

### Copy and Paste Dashboards

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

- 1) From the *Tree* pane, select the dashboard you want to copy and click on the  Copy icon.
- 2) Click on the **My Dashboards** folder and click on the  **Paste** icon. A copy of the selected dashboard is now in your *My Dashboards* folder.

You can change the name of the dashboard by clicking on the **Edit** icon in the *Details* pane.



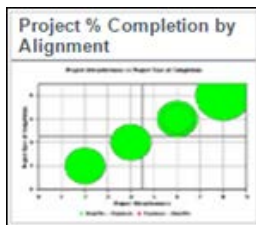
### Alignment-Measure Time series

This chart displays Measure Data on Y-Axis for selected Alignment node and the reporting period of X-Axis. For multi-Initiative system, choose an initiative that is to be displayed.



### Project % Completion by Alignment

This chart displays the Percent Completion on Y-Axis for projects that qualify the filter criteria and Project Alignment (Strategy) on X-Axis. You can click on a bubble to drill down to the individual project.



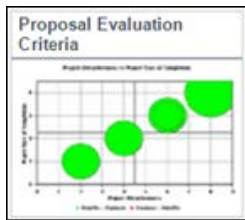
### Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Optional Drill Down	Supported Chart Type
Alignment List	Alignment Nodes		Alignment		Measure List, Data and Chart		Table
Alignment-Measure Timeseries	Measure Value	Date Range	Alignment				Line
Project % Completion by Alignment	% Complete	Alignment	Alignment		Project Basics Page		Bubble

## Proposals (Charters)

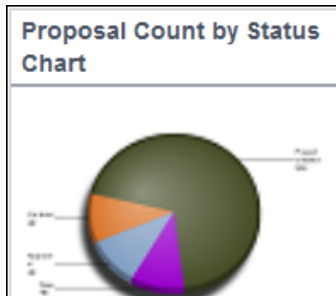
### Proposal evaluation Criteria

This chart displays a bubble chart for proposal (charter) that qualify the filter criteria. The X and Y Axis are represented by evaluation criteria, and the size of the bubble is determined by the initial financial forecast value of the proposal. You must select the appropriate Initiative (if applicable) and the # of Proposal (Charter) to display. (Max 40 at a time).



### Proposal Count by Status

This pie chart displays a count of proposals that meet the selected filter criteria and its current status. The proposals are grouped by their status. Click once to view the proposals that make up the slice, and twice to view the Proposal Listing report pertaining to the selected slice.



### Proposal Count by Organization

This pie chart displays a count of proposals that meet the selected filter criteria and the top-level organization it belongs to. Click once to view the proposals that make up the slice, and twice to view the Proposal Listing report pertaining to the selected slice.





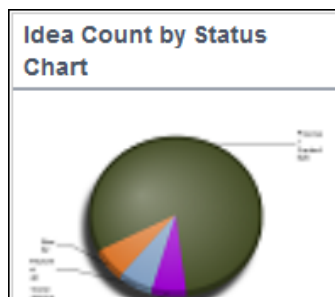
### Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Proposal Evaluation Criteria			Proposal		Measure List, Data and Chart	Bubble
Proposal Count by Status			Proposal	Count	Proposal Listing Report	Pie
Proposal Count by Organization Chart			Proposal	Count	Proposal Listing Report	Pie

## Ideas

### Idea Count by Status

This pie chart displays a count of ideas that meet the selected filter criteria and its current status. The ideas are grouped by their status. Click to view the Idea Listing Report.



### Idea Count by Organization

This pie chart displays a count of ideas that meet the selected filter criteria and the top-level organization it belongs to. Click once to view the ideas that make up the slice, and twice to view the Idea Listing report pertaining to the selected slice.



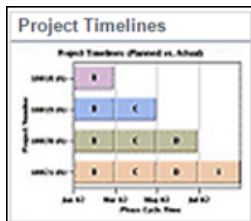
### Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Idea Count by Status			Idea		Idea Listing Report	Pie
Idea Count by Organization			Idea		Idea Listing Report	Pie

## Projects (Subcategory: General)

### Project Timelines

The chart displays project timeline by phases for projects that qualify the filter criteria. If you use program as a filter, then all projects belonging to the selected Program are displayed. You can also select the display timeline (Actual and Plan, Actual, or Plan).



## Project Activities List

The chart displays the list of activities assigned to any user. You can filter the list to view Open, Not Applicable, Completed activities, Non-WBS, WBS, milestone, and key milestone activities. You can click on a link to drill down to view Activity details.

Activity ID	Name	Start	End	Duration	Assignee
0001	The 1st Task	2000-01-01	2000-01-05	5	John Doe
0002	The 2nd Task	2000-01-05	2000-01-10	5	John Doe
0003	The 3rd Task	2000-01-10	2000-01-15	5	John Doe
0004	The 4th Task	2000-01-15	2000-01-20	5	John Doe
0005	The 5th Task	2000-01-20	2000-01-25	5	John Doe
0006	The 6th Task	2000-01-25	2000-01-30	5	John Doe
0007	The 7th Task	2000-01-30	2000-02-05	6	John Doe
0008	The 8th Task	2000-02-05	2000-02-10	5	John Doe
0009	The 9th Task	2000-02-10	2000-02-15	5	John Doe
0010	The 10th Task	2000-02-15	2000-02-20	5	John Doe

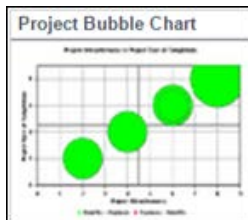
## Project Issues List

The chart displays a list of project issues. You can filter to view issues that are not assigned to a resource. You can click on a link to drill down to view Issues details.

Issue ID	Name	Start	End	Duration	Assignee
0001	The 1st Issue	2000-01-01	2000-01-05	5	John Doe
0002	The 2nd Issue	2000-01-05	2000-01-10	5	John Doe
0003	The 3rd Issue	2000-01-10	2000-01-15	5	John Doe
0004	The 4th Issue	2000-01-15	2000-01-20	5	John Doe
0005	The 5th Issue	2000-01-20	2000-01-25	5	John Doe
0006	The 6th Issue	2000-01-25	2000-01-30	5	John Doe
0007	The 7th Issue	2000-01-30	2000-02-05	6	John Doe
0008	The 8th Issue	2000-02-05	2000-02-10	5	John Doe
0009	The 9th Issue	2000-02-10	2000-02-15	5	John Doe
0010	The 10th Issue	2000-02-15	2000-02-20	5	John Doe

## Project Bubble Chart

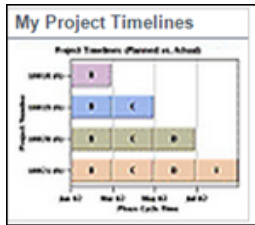
Displays a project bubble chart based on your filter criteria. You can customize the chart by selecting the parameters to display on the X axis and Y axis. You can also swap the X and Y axis parameters. Click on a link to drill down to view the Project Basics page.



## My Project Timelines

The chart displays project timeline by phases for projects that the user logged-in user is a team member on. The set of these associated projects is shown as a list and you can choose which ones to display.

The Actual and Plan timelines are displayed. This component is provided for backward compatibility. This component is deprecated for future use and the new Project Timelines component (above) should be used instead.



### My Project Open Activities List

This component displays a list of open activities on the projects that the logged-in user is a team member on. There are no filters.

This component is provided for backward compatibility. This component is deprecated for future use and the new Project Activities List component (above) should be used instead.

### My Project Issues List

This component displays a list of issues on projects that the logged-in user is associated with. There are no filters.

This component is provided for backward compatibility. This component is deprecated for future use and the new Project Issues List component (above) should be used instead.

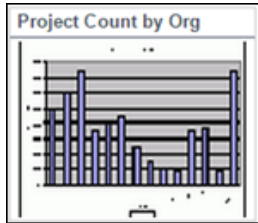
## Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Project Timelines	Gantt bars	Timeline	Project	General	Choose: Project Basics Gantt, Dates, status report	Gantt
Project Activities List	Activities		Project	General	Project Roadmap Page	Table
Project Issues List	Issues		Project	General	Project Edit Issue Page	Table
My Project Timelines	Gantt bars	Timeline	Project	General	Project Basics Page	Gantt
My Project Open Activities List	Activities		Project	General	Project Roadmap Page	Table
My Project Open Issues List	Issues		Project	General	Project Edit Issue Page	Table
Proposal Evaluation Criteria			Proposal		Measure List, Data and Chart	Bubble

## Projects (Subcategory: Count)

### Project Count by Org

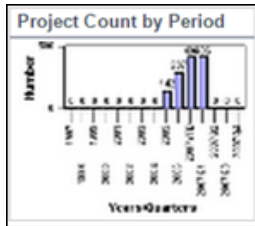
The chart displays the number of projects on Y-Axis that qualify the filter criteria and Organization on X-Axis. You can select different level of organization to show on the X-Axis from the filter criteria. Projects that aligned to multiple organizations will be counted in multiple organizations. You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Count by Period

The chart displays number of projects on Y-Axis that qualify the filter criteria and reporting period on X-Axis. Projects that start in one year and end in the next year will be counted in both years.

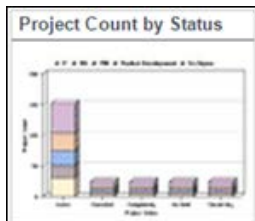
Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period. Click on a bar to drill down to the list of projects that contribute to the bar.



### Project Count by Status

The chart displays the number of projects on Y-Axis that qualify the filter criteria and Current Project Status on X-Axis. The chart shows system wide project counts, except confidential projects, depending on the user's permission.

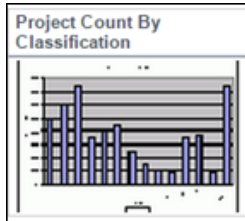
You can click on a bar to drill down to the project types and then to the list of projects that contribute to the bar.



### Project Count by Classification

The chart displays the number of projects that qualify the filter criteria on Y-Axis and the selected classification field on X-Axis. Projects that are aligned to multiple classification fields will be counted in multiple classifications.

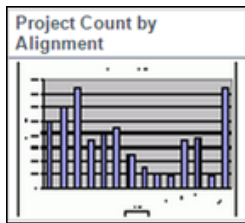
You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Count by Alignment

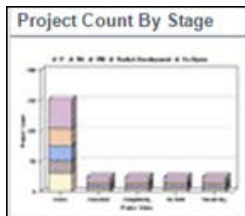
The chart displays the number of projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. This chart only works when the system has an Alignment (Strategy) configured. Projects that are aligned to multiple alignments will be counted in multiple alignments.

You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Count by Phase

The chart displays the number of projects that qualify the filter criteria on Y-Axis and Phases on X-Axis. Within a phase, projects are grouped by their on-time status (On Schedule, Schedule At Risk and Behind Schedule). If one roadmap is selected in the filter, then the phases are displayed the order specified in the Roadmap. If multiple roadmaps are selected in the filter, then the Phases are displayed alphabetically.

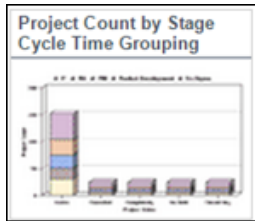


User can click on a bar to drill down to the list of projects that contribute to the bar.

### Project Count by Phase Cycle Time Grouping

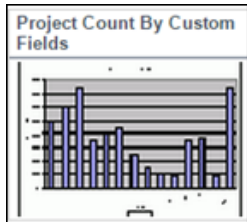
The chart displays the number of Phases closed in the recommended phase duration (Red, Amber, and Green) for projects that qualify the filter criteria on Y-Axis and Phases X-Axis. If one roadmap is selected in the filter, then the phases are displayed in the order specified in the roadmap. If multiple roadmaps are selected in the filter, then the phases are displayed alphabetically.

You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Count By Custom Field

The chart displays the number of projects that qualify the filter criteria on Y-axis and the selected custom field on X-axis. You can click on a bar to drill down to the list of projects.



### Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Project Count by Org	Organization	Project count	Project	Count	Project Listing Page	Bar
Project Count by Period	Reporting period	Project count	Project	Count	Project Listing Page	Bar
Project Count by Status	Current Project Status	Project count	Project	Count	Project Listing Page	Bar



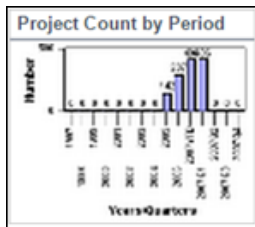
Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Project Count by Classification	Classification Field	Project count	Project	Count	Project Listing Page	Bar
Project Count by Alignment	Alignment Node	Project count	Project	Count	Project Listing Page	Bar
Project Count by Phase	Phases	Project count	Project	Count	Project Listing Page	Bar
Project Count by Phase Cycle Time Grouping	Phases (closed in the recommended phase duration)	Project count	Project	Count	Project Listing Page	Bar
Project Count by Custom Field	Custom Field	Project count	Project	Count	Project Listing Page	Bar

## Projects (Subcategory: Cycle Time)

### Project Cycle Time by Period

The chart displays projects cycle time by various Phases on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. Projects that start in one year and end in the next year will be counted in both years. Current quarter figures are as of the current date. Current year is displayed as YYYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.

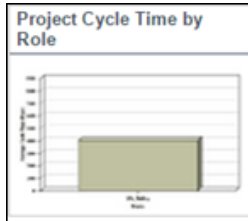
You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Cycle Time by Role

The chart displays the average cycle time for projects on Y-Axis that qualify the filter criteria and Users on X-Axis. You can click on a bar to drill down to the list of projects that contribute to the bar.

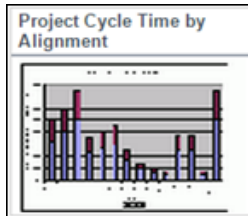
The user selection is based on the System Access Profile definition then must be further defined by an individual user level selection.



### Project Cycle Time by Alignment

The chart displays the cycle time for projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. This chart only works when the system has an Alignment (Strategy) configured. Projects that are aligned to multiple alignments are counted in multiple alignments.

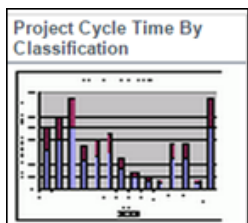
Click on a bar to drill down to the list of projects that contribute to the bar. You can select to display by Average or Median days of the cycle time.



### Project Cycle Time by Classification

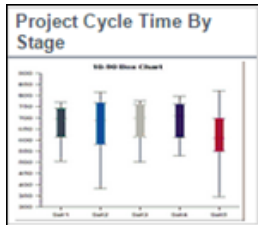
The chart displays the cycle time for projects that qualify the filter criteria on Y-Axis and the selected classification field on X-Axis. Projects that are aligned to multiple classification fields will be counted in multiple classifications.

You can click on a bar to drill down to the list of projects that contribute to the bar. In a multi-Initiative system, a selection must be made to specify the Initiative to be used.



### Project Cycle Time by Phase (Box Chart)

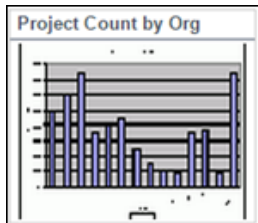
The chart displays box plot of cycle tie on Y-Axis and Phases X-Axis. If one Roadmap is selected in the filter, then the phases are displayed the order specified in the Roadmap. If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. Only the completed phases will be counted towards calculation of the box plot as on-going (or active) phase does not have the actual end date of the phase.



### Project Cycle Time by Organization

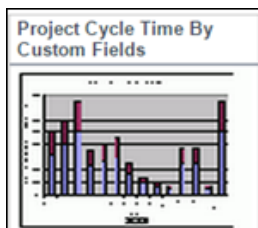
The chart displays the cycle time for projects on Y-Axis that qualify the filter criteria and Organization on X-Axis. User can select different level of organization to show on the X-Axis from the filter criteria. Projects that aligned to multiple organizations will be counted in multiple organizations.

You can click on a bard to drill down to the list of projects that contribute to the bar.



### Project Cycle Time by Custom Field

The chart displays the cycle time for projects on Y-Axis that qualify the filter criteria and the selected custom field on X-Axis. You can click on the bar to drill down to the list of projects that contribute to the bar.



### Dashboard Component Properties

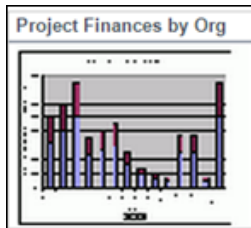
Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Project Cycle Time by Period	Cycle Time	Phases	Project	Cycle Time	Project Listing Report	Bar
Project Cycle Time by Role	Cycle Time	Users	Project	Cycle Time	Project Listing Report	Bar
Project Cycle Time by Alignment	Cycle Time	Alignment	Project	Cycle Time	Project Listing Report	Bar
Project Cycle Time by Classification	Cycle Time	Classification Field	Project	Cycle Time	Project Listing Report	Bar
Project Cycle Time by Phase	Cycle Time	Phases	Project	Cycle Time	Project Listing Report	Box Chart
Project Cycle Time by Organization	Cycle Time	Organization	Project	Cycle Time	Project Listing Report	Bar
Project Cycle Time by Custom Field	Cycle Time	Custom Field	Project	Cycle Time	Project Listing Report	Bar

## Projects (Subcategory: Finances)

### Project Finances by Org.

The chart displays the total for selected financial categories on Y-Axis for projects that qualify the filter criteria and Organization on X-Axis.

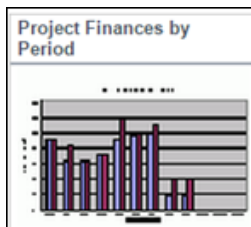
You can click on a bar to drill down to the list of projects that contribute to the bar. The chart can be displayed on different levels of the defined organization structure by the filter selection.



### Project Finances by Period

The chart displays the realized vs. forecast finances on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.

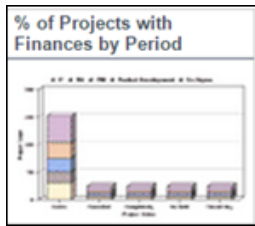
You can click on a bar to drill down to the list of projects that contribute to the bar. The Forecast is the total finances that are current for all projects in the system. The Realized (Actual) is the total finances that are locked for all projects in the system.



### % of Projects with Finances by Period

The chart displays the percent of projects with financial benefits on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. If more than one financial category is selected, then the percent of projects with benefits is calculated based on the sum of the selected financial categories. If a project contributes to more than one year, the project's financial impact will be attributed to the corresponding reporting period. Current quarter figures are as of the current date. Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.

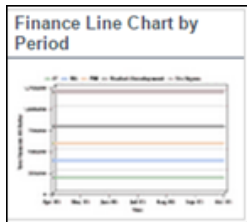
You can click on a bar to drill down to the project types and then to the list of projects that contribute to the bar.



### Finance Line Chart by Period

The chart displays Net Finances on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis.

You can click on a bar to drill down to the list of projects that contribute to the bar.



### Priority by Finances

The chart displays the Risk or Priority on Y-Axis for the projects that qualify the filter criteria and Finances on X-Axis.

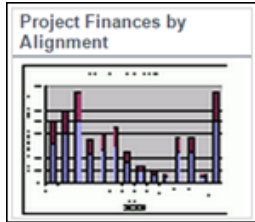
You can click on a bubble to drill down to the individual projects.



### Project Finances by Alignment

The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. This chart only works when the system has an Alignment (Strategy) configured. Projects that are aligned to multiple alignments using specified percent allocation.

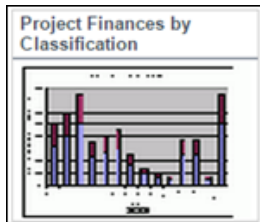
Click on a bar to drill down to the list of projects that contribute to the bar.



### Project Finances by Classification

The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and selected classification field on X-Axis. Projects that are aligned to multiple classification fields will be counted in multiple classifications.

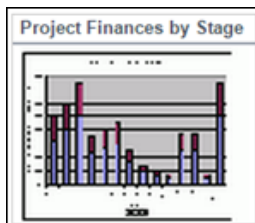
You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Finances by Phase

The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and Phases X-Axis. If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically.

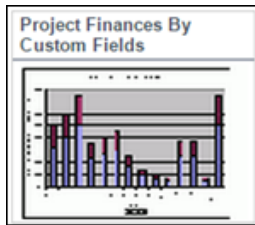
You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Finances by Custom Fields

The chart displays the sum of finances that qualify the filter criteria on Y-Axis and the selected classification field on X-Axis.

You can drill down to a list of projects that contribute to the bar.



### Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Project Finances by Org.	Organization	Total Finances	Project	Finances	Project Listing Report	Bar
Project Finances by Period	Reporting Period	Total Finances	Project	Finances	Project Listing Report	Bar
% of Projects with Finances by Period	Reporting Period	Total Finances	Project	Finances	Project Listing Report	Bar
Finances Line Chart by Period	Reporting Period	Total Finances	Project	Finances	Project Listing Report	Bar
Priority by Finances	Risk or Priority	Total Finances	Project	Finances	Project Listing Report	Bubble



Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Supported Chart Type
Priority by Alignment	Alignment Node	Total Finances	Project	Finances	Project Listing Report	Bubble
Project Finances by Classification	Classification Fields	Total Finances	Project	Finances	Project Listing Report	Bubble
Project Finances by Phase	Phase	Total Finances	Project	Finances	Project Listing Report	Bubble
Project Finances by Custom Fields	Custom Field	Total Finances	Project	Finances	Project Listing Report	Bubble

## Projects (Subcategory: Metrics)

### % Change In Metrics By Period

The chart displays the percent change in metrics on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. The chart can report on either primary project metric or specific metric type. (One at a time.) Projects that start in one year and end in the next year will be counted in both years. Current quarter figures are as of the current date. Current year is displayed as YYYYTYD. E.g. 2009YTD where YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.

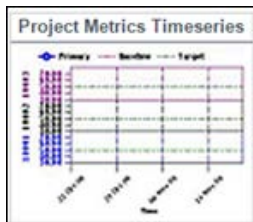
You can click on a bar to drill down to the list of projects that contribute to the bar.



### Project Metrics Timeseries

The chart displays Primary Metrics on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis for the projects that the current user is associated with.

System Administrator will not see any information when running this dashboard.



### Dashboard Component Properties

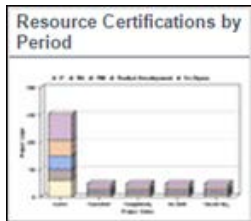
Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Optional Drill Down	Supported Chart Type
% Change In Metrics by Period	% of Metrics	Date Range	Project	Metrics	Project Listing Report		
Project Metrics Timeseries	Metric Value	Date Range	Project	Metrics		Project Basics Page	Line

## Resource

### Resource Certifications by Period

The chart displays the user certification by certification type on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. This chart shows information only when there is associated certification defined in the system. Current quarter figures are as of the current date. Current year is displayed as YYYYTTD. E.g. 2009YTD where YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.

You can click on a bar to drill down to the list of resources that contribute to the bar.



### Resource Certifications by Org

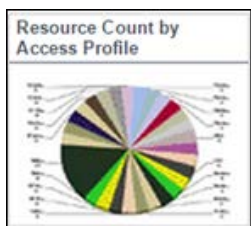
The chart displays the number of certifications on Y-Axis for resources that qualify the filter criteria and organization on X-Axis. Current quarter figures are as of the current date. Current year is displayed as YYYY YTD. E.g. 2009 YTD where YTD means Year to Date. Prior quarter and year-end figures are as of the last day of the period.

You can click on a bar to drill down to the list of projects that contribute to the bar.



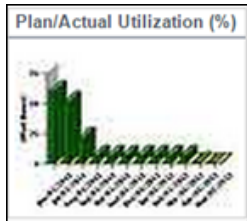
### Resource Count by Access Profile

This pie chart displays a distribution of resources that qualify the filter criteria. Resources are grouped by access profile. Filters are available to select the resources based on the organization hierarchy and/or the status of the resource within the system.



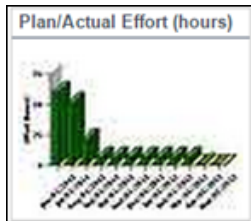
### Resource Utilization Chart

The chart displays Heat map by resource. You can select multiple initiatives if more than one is configured. This chart is associated with the PMO module, and is available only if the PMO feature is enabled. Both plan and actual % are always displayed. You can configure the display for daily or monthly, and select the display mode to be either Percentage or Total.



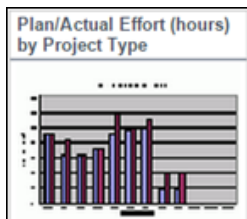
### Project Effort Chart

The chart displays Heat map by project. This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. Both plan and actual % are always displayed. Display can be configured for daily or monthly.



### Project Effort Chart by Project Type, or by Project Methodology, or by Organization, or by Alignment, or by Classification

The chart displays Heat map by project. This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. Both plan and actual hours are always displayed. Display can be configured for daily or monthly.



## Dashboard Component Properties

Component Name	Data Available for X-axis	Data Available for Y-axis	Category	Sub-Category	Default Drill Down	Optional Drill Down	Supported Chart Type
Resource Certifications by Period	Certifications	Date Range	Resources		Resource Professional Certification Report	Resource Listing Report	Bar
Resource Certifications by Org	Certifications	Organization	Resources		Resource Professional Certification Report	Resource Listing Report	Bar
Resource Count by Access Profile	Resource Count	Access Profile	Resources		Resource Listing Page	N/A	Pie
Resource Utilization Chart	Calendar	% Utilization	Resources		Heat Map by Resource report		Bar
Project Effort Chart	Calendar	Effort Hours	Resources		N/A		Bar
Project Effort Chart by Project Type, or by Project Methodology, or by Organization, or by Alignment, or by Classification	Project Type/ Project Methodology/ Organization/ Alignment/ Classification	Effort Hours	Resources		N/A		Bar

## Where to Get Documentation

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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.

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

### Help System Access

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.

## Documentation Accessibility

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For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Where to Get Training

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

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# Where to Get Support

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If you have a question about using Oracle products that you or your network administrator cannot resolve with information in the documentation or help, click <http://support.oracle.com>. This page provides the latest information on contacting Oracle Global Customer Support, knowledge articles, and the support renewals process. For more information about working with Support, visit <https://support.oracle.com/epmos/faces/DocumentDisplay?id=888813.2> to view **Support Tools & Tips**.

## Using Primavera's Support Resource Centers

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

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

PICs also provide access to:

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

## Creating a Service Request

EnterpriseTrack integrates with different Oracle applications; when you create a Service Request, be sure to open the request with the proper Support team. To ensure you reach the proper Support team, enter the correct product information when you create the Service Request. Each product has its own support line.

- ▶ Use the **Instantis EnterpriseTrack** support line when you are having installation, configuration, or connection issues related to EnterpriseTrack.
- ▶ Use one of the following support lines when you are having installation or configuration issues that do not relate to EnterpriseTrack:
  - ▶ Oracle WebLogic Server
  - ▶ Oracle Database Server
  - ▶ BI Publisher
  - ▶ Oracle Access Manager

### **Keeping Your Software Up to Date**

To ensure you have the latest versions of your products, be sure to download and install all available patch sets from <http://support.oracle.com>.

### **Finding Security-related Patches**

To get the latest information about Critical Patch Updates, visit <http://www.oracle.com/technetwork/topics/security/alerts-086861.html>.



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Oracle Instantis EnterpriseTrack Dashboard User Guide

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