# ORACLE® EnterpriseTrack
## INSTANTIS

**Report User Guide**
**16 R1**

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# Contents

# About this Manual

The *Report 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.

## In This Section

## 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

## In This Section

## 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. From the Reports module, you can perform the following actions:

▶ run reports
▶ customize reports by changing the filter and output parameters
▶ bookmark reports
▶ copy reports
▶ delete reports
▶ share reports
▶ schedule and email reports
▶ save report history
▶ view report history

You can restrict these reports to either an initiative, or across multiple initiatives.

### In This Section

## 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:** contains all reports that you have created.
▶ **Shared Reports:** contains all reports that have been shared by other users.
▶ **Pre-defined Reports:** contains all reports that are pre-defined in the system.

▸ **Global Reports:** contains all global reports.

▸ **Custom Reports:** contains all reports that are customized for your system.

## In This Section

## 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**.

### Using Finance Filters

The following table lists the available finance filters. 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.

| Filters | Pull-down Values | Description |
|---------|------------------|-------------|
| Finance Template | The finance templates configured by your administrator. | Select the finance template you are using. |
| Finance Type | ▶ Locked<br>▶ Unlocked<br>▶ All (Locked and Unlocked) | Locked: All finance values before the lock date.<br><br>Unlocked: All finance values after the lock date.<br><br>All (Locked and Unlocked): All forecast values. |
| Finance View | ▶ Plan<br>▶ Actual<br>▶ Forecast<br>▶ Plan or Basic<br>▶ Actual or Basic | The options displayed here are based on the finance template you selected. If the template you selected supports double view, the following options are displayed: Actual, Plan, and Forecast. If your selected template supports single view, you will only have the option to select Basic. If no finance template is selected, you will see the following options:<br><br>▶ Plan or Basic: This option is displayed if there are some projects that use the double-view functionality and some that use the single-view functionality. The Plan value come from projects that use the double view functionality, and the Basic value come from projects that use the single view functionality.<br><br>▶ Actual or Basic: This option is displayed if there are some projects that use the double-view functionality and some that use the single-view functionality. The Actual value come from projects that use the double view functionality, and the Basic value come from projects that use the single view functionality. |

| Date Range | ▸ This Fiscal Year<br>▸ Previous Fiscal Year<br>▸ Next Fiscal Year<br>▸ Any start to end month<br>▸ All Fiscal Years<br>▸ Trailing 12 months<br>▸ Next 12 months<br>▸ This Fiscal Qtr<br>▸ Previous Fiscal Qtr<br>▸ Next Fiscal Qtr<br>▸ This Fiscal Year Q1<br>▸ This Fiscal Year Q2<br>▸ This Fiscal Year Q3<br>▸ This Fiscal Year Q4<br>▸ Current Month<br>▸ Previous Month<br>▸ 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.<br><br>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 to end month<br><br>You can choose aggregation of past or future months. |
| Snapshot (for Plan)<br><br>Snapshot (for Actual) | Displays a complete list of snapshots. | 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. The Default Plan Snapshot is always at the top of the list. |

| Finance Detail Level | ▶ Total<br>▶ Group<br>▶ Category<br>▶ Element | 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.<br>Total: shows only the top level (Total).<br>Group: shows the Group level, one level below Total (up to 5, depends on number of Groups configured)<br>Category: shows the Category level, 2 levels below Total<br>Element: shows the Element level, 3 levels below Total |
|---|---|---|
| Show Upper Levels | ▶ Yes<br>▶ No | 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.<br>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. |

| | | |
|---|---|---|
| Start Month | | This field displays only if the selected date range is *Any start to end month.* Use the calendar picker to select the start and end dates. |
| End Month | | |

**Finance Aggregate Report Filters**

The table below describes the additional output parameters for the finance aggregate reports.

| 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. |
| 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.<br><br>**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%. |

## 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.
▶ If you want to receive email notification when the report is run.
▶ If you want to include the report as an email attachment when email notifications are sent.

The system sets an expiry date for all scheduled reports and displays the ⏱ icon next to reports that have expired. The expiry date is based on the scheduling frequency. You can renew

scheduled report by clicking the 🔄 **Renew** icon, or you can click the **Renew** button from the **Schedule and Email** tab.

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**.

On the List pane, the reports that are scheduled have the ⏱ **Scheduled** icon.

> **Note**: If your administrator has disabled your scheduled report, it is displayed on the **Schedule and Email** tab.

**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.

**Bookmarking Reports**

You can bookmark reports that you want to access frequently. The display and filter parameters that are currently set are used to generate this report.

To bookmark a 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 the **General** tab.
5) Click ⭐ **Bookmark this report**.
6) Select a folder and click **Add**.

**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

### In This Section

## Idea Listing Report

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

### Filter Parameters

You can filter on idea basics and organization hierarchy.

### Output Parameters

You can select the output columns to display, the report format, 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 | External ID ⇕ | Idea Number ▲ | Idea Title ⇕ | Idea Status ⇕ | Submitter Name | Initiative | Description of Problem/Opportunity | Division ⇕ | Department ⇕ | Customer ⇕ | Region ⇕ | Primary Contact | Idea Owner | Submission Date ⇕ | Date Accepted/Rejected | Evaluation Score ⇕ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| [ View Details ] | 1 | 1 | Hong Kong Office Relocation | Owner Assigned | Allen, Vanessa | | An office move at the end of the lease in or a partial or full refubishment of the current offices. This is the IT part of the relocation or referbishment. | Info Tech | Operations | Corporate | JAPAC | Allen, Vanessa | Allen, Vanessa | Feb/11/2014 | N/A | 6.90 |
| [ View Details ] | 2 | 2 | Lighting Efficiency for Building 51 | Owner Assigned | Allen, Vanessa | | Develop companywide lighting specifications in accordance with utility cost reduction, IECC compliance, supply continuity at competitive costs, and brand standards. | Info Tech | Operations | Corporate | NA | Allen, Vanessa | Kim, Marie | Feb/11/2014 | N/A | 7.80 |
| [ View Details ] | 3 | 3 | Broadband Expansion for Remote Offices | New | Allen, Vanessa | | 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 | Operations | Global | Allen, Vanessa | | Feb/11/2014 | N/A | 7.10 |
| [ View Details ] | 4 | 4 | *EPIC | Owner Assigned | Allen, Vanessa | | Provide employees with online access to information, systems, policies and procedures as appropriate to support the needs of the employee and the business through an internal company intranet and/or external employee portal. | Info Tech | Apps | Corporate | Global | Allen, Vanessa | Allen, Vanessa | Feb/11/2014 | N/A | 8.20 |
| [ View Details ] | 13 | 5 | Electronic Supply Catalogue | Owner Assigned | Hartley, Sandy | | Create an electronic catalogue for online customers. | Info Tech | Operations | Corporate | EMEA | Hartley, Sandy | Parsons, Alan | Aug/21/2013 | N/A | 5.50 |

Showing Records 1 - 5 of 16   > >>

## Project Request Listing

Based on your filters, this report displays all proposals in the system. It displays the external ID, initiative, proposal ID, name, status, project type, roadmap, organization levels, 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 initiative, project request basics, organization hierarchy, and finances.

### Output Parameters

You can select the output columns to display, the report format, primary 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

Based on your filters, this report displays all projects in the system. It displays the external ID, initiative, project ID, project name, phase, status, organization levels, project type, schedule, team size, timesheets #, related entities, activities #, project creation dates, classification, unlocked finances, last validation date, and evaluation score.

> **Note:** The Current Phase column is populated only if the project roadmap is gated.

**Filter Parameters**

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

**Output Parameters**

You can select output columns to display, the report format, 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 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



## Resource Listing

Based on your filters, this report displays all resources. It displays the external ID, name, login ID, resource status, manager login ID, 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 initiative, resource basics, time reporting and rates, organization hierarchy, and resource filterable custom fields.

### Output Parameters

You can select the output columns to display, report format, 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

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 | | 0 | 2 | 1 | 16 | 0 |
| Aldridge | Mike | | maldridge | 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 | Aug/05/2014 | 3 | 21 | 3 | 50 | 4 |
| Althaus | Conrad | | calthaus | Active | | 0 | | 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 | May/06/2014 | 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 |

25

## 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, view resource details, choose to display the WBS code column, and select the optional columns (Attachment, Predecessor, and Successors) to display.

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

> **Note:** 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**, then each activity with all its assignments is contained within a single cell in that row.

### 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 | | | | 9 |
| | 96 | *Secure Credit Card | 1 | New customers | | Primary | Growth | | | | | 95 | | | | 95 |
| | 85 | *Web Banking System Upgrade | 1 | New customers | | Primary | Growth | | | | | 95 | | | | 95 |
| Jun/29/201 | | ADM History R | | Upti | | Secondary | ugs 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 | trek | | Open | High | Unassigned | Risk | 0 | Forsythe, John (Project | Forsythe, |

## Status Report Listing

Use the Status Report Listing report to display a detailed list of all status reports currently in the system, including the details of each individual status report. You must select an initiative before running this report. From the **Project Status Report Basics** filter, you can select:

▶ To include status report that are most recent or within a certain date range.
▶ To view reports submitted by all resources or individual resources.
▶ The number of status reports for each project that should be display in the report.

### Filter Parameters

You can filter on initiative, project basics, project dates, project organization hierarchy, project methodology, project custom fields, project classification fields, project alignment tree, and project status report basics.

### Output Parameters

The available report formats are: CSV, and HTML.

### Sample Report

**Status Report Listing**

Show Current Filters                                                                                          Done

| Project ID | Project Name | Status Report Name | From Date | To Date | Status | Submitter | Approved Date | Time - Status | Time - Explanation | Overall - Status |
|---|---|---|---|---|---|---|---|---|---|---|
| 63 | Progetto Rosso | Status Report For Y 2015 W 19 | May/03/2015 | May/09/2015 | Submitted | Krahn, Annamaria | | Green IT | Prepping for project start. | Green IT |
| 64 | Progetto Azzurro | Status Report For Y 2015 W 19 | May/03/2015 | May/09/2015 | Submitted | Schweinsteiger, Brenda | | Green IT | To date, we're on schedule. | Yellow IT |
| 66 | Rapid Deployment | Status Report For Y 2015 W 19 | May/03/2015 | May/09/2015 | Submitted | Podolski, Lars | | Red IT | Experiencing severe overruns! | Red IT |

## Alignment Tree Report

Based on your filters, this report displays a list of all objects associated with an alignment.

### Filter Parameters

You can filter on module, initiative, alignment tree, alignment basics, project basics, project dates, project organization hierarchy, project classification fields, project methodology, project custom fields, proposal basics, proposal dates, proposal organization hierarchy, proposal classification fields, proposal custom fields, idea basics, idea dates, idea organization hierarchy, idea classification fields, and idea custom fields.

### Output Parameters

You can select the report format, the primary column to sort on, the primary sort direction, the maximum rows per report, and if the output should be compressed. The available report format choices are CSV, MS Excel, and HTML.

### Sample Report

**Alignment Tree Report**

Show Current Filters

| External ID | Initiative | Type | ID | Name | Status | Division | Department | Customer | Region | Alignment External ID | Alignment Tree Name | Alignment Name | Type on the Alignment | % Contribution | Description | Alignment Status | Owner | Tracking Frequency |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Information Technology | Project | 1 | DR/BCP Annual Test | Active | Info Tech | Operations | Operations | Global | KLNKGR727MJCW | Strategies | Increase Cust Sat | Strategy | 100 | | Active | Kanes, Brianna | MONTH |
| 1 | Information Technology | Project | 1 | DR/BCP Annual Test | Active | Info Tech | Operations | Operations | Global | KL9S65V2L5924 | Application Services | Finance | Application | 100 | | Active | Strom, Betsy | MONTHLY |
| 1 | Information Technology | Project | 1 | DR/BCP Annual Test | Active | Info Tech | Operations | Operations | Global | KM6TTMDSX5PQ2 | Budgetary Focus | Run | Spend | 100 | | Active | Trumain, Paul | MONT |
| 2 | Information Technology | Project | 2 | C83 Horn R&D | Active | Info Tech | Apps | Engineering | EMEA | KLNKFVTC6F8DF | Strategies | Increase Sales | Strategy | 100 | | Active | Summers, Peter | MONTHLY |
| 2 | Information Technology | Project | 2 | C83 Horn R&D | Active | Info Tech | Apps | Engineering | EMEA | KL9S5MQ72XTJ6 | Application Services | Data | Application | 100 | | Active | | MONTH |
| 2 | Information Technology | Project | 2 | C83 Horn R&D | Active | Info Tech | Apps | Engineering | EMEA | KM6TTT9K5TDD2 | Budgetary Focus | Transform | Spend | 100 | | Active | Panella, Louis | MONTH |
| 3 | Information Technology | Project | 3 | Data to Voice / Voice to Data | On Hold | Info Tech | Apps | Engineering | NA | KLNKFVTC6F8DF | Strategies | Increase Sales | Strategy | 100 | | Active | Summers, Peter | MONTHL |
| 3 | Information Technology | Project | 3 | Data to Voice / Voice to Data | On Hold | Info Tech | Apps | Engineering | NA | KL9S5MQ72XTJ6 | Application Services | Data | Application | 100 | | Active | | MONT |
| 3 | Information Technology | Project | 3 | Data to Voice / Voice to Data | On Hold | Info Tech | Apps | Engineering | NA | KM6TT8W535KQM | Budgetary Focus | Grow | Spend | 100 | | Active | Kimball, Marie | MONTHLY |
| 4 | Information Technology | Project | 4 | Customer Experience | Active | Info Tech | Apps | Sales | Global | KLNKGR727MJCW | Strategies | Increase Cust Sat | Strategy | 100 | | Active | Kanes, Brianna | MONT |

Showing Records 1 - 10 of 231    > >>

Close

## Project Reports (Summary Reports)

### In This Section

## 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 |

## 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 Alignment

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.

### 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 |
| Lower Expenses | 0 | 0 | 0 | 0 | 0 |
| Increase Cust Sat | 0 | 0 | 0 | 0 | 0 |
| **Totals** | 0 | 0 | 0 | 0 | 0 |

Close

## Project Classification Summary Report

Based on your filters, this report displays the classification summary report. You can have up to four classification fields enabled in your system. The labels for these classification fields depend on your configuration. 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 | Group4 |
| Corporate | 0 | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0 |
| Customer Support | 22 | 13 | 51,600,000.00 | 258,000,000.00 | 206,400,000.00 | 258,000,000.00 | 103,200,000.00 |
| Engineering | 0 | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Finance | 24 | 12 | 52,800,000.00 | 264,000,000.00 | 211,200,000.00 | 264,000,000.00 | 105,600,000. |
| Manufacturing | 0 | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.0 |
| Marketing | 8 | 12 | 3,200,000.00 | 21 ,000,000.00 | 173,400,000.0 | 216,000,000.00 | 86,400,000.00 |

## 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 associate 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)

### In This Section

### Project Listing by Role

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 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 | |

The report above is titled **Project Listing By Role** with a **Show Current Filters** link and a **Project Manager Project Metrics** subheading.

## 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 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**



## Project Notes Report

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

**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.

**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** | Floorman, Lori |
| **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

| | | | Financial Impac.. | Customer Satisf.. | Cultural Impact | Translatable | Ease of Complet.. | Evaluation Score |
|---|---|---|---|---|---|---|---|---|
| Idea Id | Idea Name | Weights--> | 40% | 20% | 10% | 10% | 20% | |
| 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

| | | | Benefits | | | | | Total Score | Feasibility | | | | | Total Score |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | Repeatable | Financial | Organizational | Product | Process | | Time | Technology | Organizational | Capability | Financial | |
| Project Request ID | Project Request Name | Weights --> | 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 Evaluation Report

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

### Filter Parameters

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

### 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

**Project Evaluation Reports**

Show Current Filters

Initiative - IT

| | | | Business Value | | | | Feasibility | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | | Financial impac.. | Impact on custo.. | Strategic impac.. | Total Score | Risk mitigation | Budget and Reso.. | Timeframe suita.. | Total Score |
| Project ID | Project Name | Weights --> | 34% | 33% | 33% | | 34% | 33% | 33% | |
| 1 | New Methodology for Component A | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | *Customer Financing Approval Process | | 5 | 2 | 1 | 2.69 | 7 | 2 | 6 | 5.02 |
| 4 | *Petroleum Supply Management | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 | Approve to hire process | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | AR process improvement | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 7 | Battery Drain/Charge Cycle Project | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | Call Center Staffing Optimization | | 6 | 3 | 2 | 3.69 | 4 | 8 | 2 | 4.66 |
| 9 | Custom Order Assembly Process | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 13 | Clean Room Contamination Assessment | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Close

## Project Request Signoff Report

Based on your filters, this report displays the sign-off status for charter team members.

### Filter Parameters

You can filter on initiative, proposal basics, proposal team, proposal organization hierarchy, proposal classification fields, and proposal custom fields.

**Output Parameters**

You can select the report format, the primary column to sort on, the primary sort direction, the maximum rows per report, and if the output should be compressed. You can also select the output columns to display.

The available report format choices are CSV, MS Excel, and HTML.

**Sample Report**

**Project Request Signoff**

Show Current Filters

| Project Request Key | Initiative | Project Request ID | Project Request Name | Project Request Status | Division | Department | Customer | Region | Project Type | Roadmap | Role | Member | Signoff Type | Signoff Status | Comments |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 193 | Information Technology | 4 | Update for GL Journal Transfer | Project Created | Info Tech | Operations | Finance | JAPAC | IT | PMBOK-Short | Operations Director | | Signoff Not Required | Not Applicable | |
| 193 | Information Technology | 4 | Update for GL Journal Transfer | Project Created | Info Tech | Operations | Finance | JAPAC | IT | PMBOK-Short | Release Manager | | Signoff Not Required | Not Applicable | |
| Charter_103 | Continuous Improvement | 63 | Customer Financing Approval Process | Project Created | Finance | Cont Improvement | Sales | NA | Six Sigma | DMAIC | Champion | Pfeifer, Molly | Signoff Not Required | Not Applicable | |
| 187 | Information Technology | 10 | *ERP Upgrade | Project Created | Info Tech | Apps | Corporate | Global | IT | PMBOK-Short | Project Manager | Allen, Vanessa | Signoff Not Required | Not Applicable | |
| 187 | Information Technology | 10 | *ERP Upgrade | Project Created | Info Tech | Apps | Corporate | Global | IT | PMBOK-Short | Project Sponsor | Summers, Peter | Signoff Not Required | Not Applicable | |
| 187 | Information Technology | 10 | *ERP Upgrade | Project Created | Info Tech | Apps | Corporate | Global | IT | PMBOK-Short | Legal Counsel | | Signoff Not Required | Not Applicable | |
| 187 | Information Technology | 10 | *ERP Upgrade | Project Created | Info Tech | Apps | Corporate | Global | IT | PMBOK-Short | Applications Director | | Signoff Not Required | Not Applicable | |
| 187 | Information Technology | 10 | *ERP Upgrade | Project Created | Info Tech | Apps | Corporate | Global | IT | PMBOK-Short | Operations Director | | Signoff Not Required | Not Applicable | |
| 187 | Information Technology | 10 | *ERP Upgrade | Project Created | Info Tech | Apps | Corporate | Global | IT | PMBOK-Short | Release Manager | | Signoff Not Required | Not Applicable | |
| Charter_103 | Continuous Improvement | 63 | Customer Financing Approval Process | Project Created | Finance | Cont Improvement | Sales | NA | Six Sigma | DMAIC | Process Owner | Moretti, Amber | Signoff Not Required | Not Applicable | |
| 163 | Continuous Improvement | 163 | Completed Project2 | Project Created | Finance | Cont Improvement | Corporate | NA | Six Sigma | DMAIC- Short | Master Black Belt | Panton, Carla | Signoff Not Required | Not Applicable | |
| 163 | Continuous Improvement | 163 | Completed Project2 | Project Created | Finance | Cont Improvement | Corporate | NA | Six Sigma | DMAIC- Short | Champion | Pfeifer, Molly | Signoff Not Required | Not Applicable | |
| 163 | Continuous Improvement | 163 | Completed Project2 | Project Created | Finance | Cont Improvement | Corporate | NA | Six Sigma | DMAIC- Short | Process Owner | Walther, Neil | Signoff Not Required | Not Applicable | |
| 196 | Information Technology | 30 | PM Template Refresh - South America | Team Assigned | Info Tech | Apps | Corporate | LAD | IT | PMBOK-Short | Project Manager | Allen, Vanessa | Signoff Not Required | Not Applicable | |
| 196 | Information Technology | 30 | PM Template Refresh - South America | Team Assigned | Info Tech | Apps | Corporate | LAD | IT | PMBOK-Short | Project Sponsor | Panella, Louis | Signoff Not Required | Not Applicable | |

## Project Alignment Report

Based on your filters, this report displays a list of all projects, their alignments, and alignment contribution.

**Filter Parameters**

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

**Output Parameters**

You can select the report format, the primary column to sort on, the primary sort direction, the maximum rows per report, and if the output should be compressed. You can also select the output columns to display. The available report format choices are CSV, MS Excel, and HTML.

## Sample Report

**Project Listing By Alignment**

Show Current Filters

| Alignment External ID | Project ID | Project Name | Project Type | Status | Phase | Planned Start Date | Target Project Close Date | Planned Completion Date | Actual Start Date | Actual Completion Date | Division | Department | Customer | Region | Alignment Tree | Level 1 | Level 2 | Level 3 | Level 4 | % Contributi... |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| KLNKGR727MJCW | 1 | DR/BCP Annual Test | Process | Active | Implementation-ITIL | Nov/08/2013 | Aug/25/2015 | Oct/06/2015 | Jun/30/2014 | | Info Tech | Operations | Operations | Global | Strategies | Information Technology | Increase Cust Sat | | | 100 |
| KL9S65V2L5924 | 1 | DR/BCP Annual Test | Process | Active | Implementation-ITIL | Nov/08/2013 | Aug/25/2015 | Oct/06/2015 | Jun/30/2014 | | Info Tech | Operations | Operations | Global | Application Services | Corporate | Finance | | | 100 |
| KM6TTMDSX5PQ2 | 1 | DR/BCP Annual Test | Process | Active | Implementation-ITIL | Nov/08/2013 | Aug/25/2015 | Oct/06/2015 | Jun/30/2014 | | Info Tech | Operations | Operations | Global | Budgetary Focus | Organization | Division | Info Tech | Run | 100 |
| KLNKFVTC6F8DF | 2 | C83 Horn R&D | IT | Active | Plan/Design-Short | Nov/18/2013 | May/14/2015 | Jun/25/2015 | Nov/18/2014 | | Info Tech | Apps | Engineering | EMEA | Strategies | Information Technology | Increase Sales | | | 100 |
| KL9S5MQ72XTJ6 | 2 | C83 Horn R&D | IT | Active | Plan/Design-Short | Nov/18/2013 | May/14/2015 | Jun/25/2015 | Nov/18/2014 | | Info Tech | Apps | Engineering | EMEA | Application Services | Corporate | Data | | | 100 |
| KM6TTT9K5TDD2 | 2 | C83 Horn R&D | IT | Active | Plan/Design-Short | Nov/18/2013 | May/14/2015 | Jun/25/2015 | Nov/18/2014 | | Info Tech | Apps | Engineering | EMEA | Budgetary Focus | Organization | Division | Info Tech | Transform | 100 |
| KLNKFVTC6F8DF | 3 | Data to Voice / Voice to Data | IT | On Hold | Execute/Control-Short | Sep/16/2013 | Dec/03/2014 | Jan/14/2015 | Apr/21/2014 | | Info Tech | Apps | Engineering | NA | Strategies | Information Technology | Increase Sales | | | 100 |
| KL9S5MQ72XTJ6 | 3 | Data to Voice / Voice to Data | IT | On Hold | Execute/Control-Short | Sep/16/2013 | Dec/03/2014 | Jan/14/2015 | Apr/21/2014 | | Info Tech | Apps | Engineering | NA | Application Services | Corporate | Data | | | 100 |
| KM6TT8W535KQM | 3 | Data to Voice / Voice to Data | IT | On Hold | Execute/Control-Short | Sep/16/2013 | Dec/03/2014 | Jan/14/2015 | Apr/21/2014 | | Info Tech | Apps | Engineering | NA | Budgetary Focus | Organization | Division | Info Tech | Grow | 100 |
| KLNKGR727MJCW | 4 | Customer Experience | IT | Active | Execute/Control-Short | Oct/17/2013 | Apr/09/2015 | May/21/2014 | Aug/26/2014 | | Info Tech | Apps | Sales | Global | Strategies | Information Technology | Increase Cust Sat | | | 100 |

Showing Records 1 - 10 of 129   > >>

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## Project Reports (Spreadsheet Reports)

## In This Section

### Project Finance Spreadsheet Report

You can generate the project finance report using the filter and output options. You must first download the template before you can view the output in Microsoft Excel.

This report is designed to export the contribution each element line item makes to the finance category, group and total levels after applying the relevant multiplication factors. To identify the month, the report uses Q to represent the quarter and M to represent the month, for example if the fiscal year starts in January, January would be displayed as Q1_M1 and February as Q1_M2. April would be Q2_M1 as it is the first month of the second quarter. There are four columns for each month representing the four different levels of the template as follows:

▸ Qx_My_1 maps to the monthly value for the total level
▸ Qx_My_2 maps to the monthly value for group level
▸ Qx_My_3 maps to the monthly value for category level
▸ Qx_My_4 maps to the monthly value for element level

The columns M2, M3 and M4 map to the multiplication factors for group (M2), category (M3) and element (M4).The data on this report is tailored for manipulation into a pivot table.

#### 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 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



Project Detail Spreadsheet Report.csv [Read-Only]

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Project ID | Project Name | Status | Current Phase | Division | Department | Customer | Initial Forecast E | Initial Forecast ( |
| 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 Attachement | 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



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* | | | | |

## Finance Aggregate Reports

You can configure the three Finance Aggregate Reports 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 Sna | 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 Sna | 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.
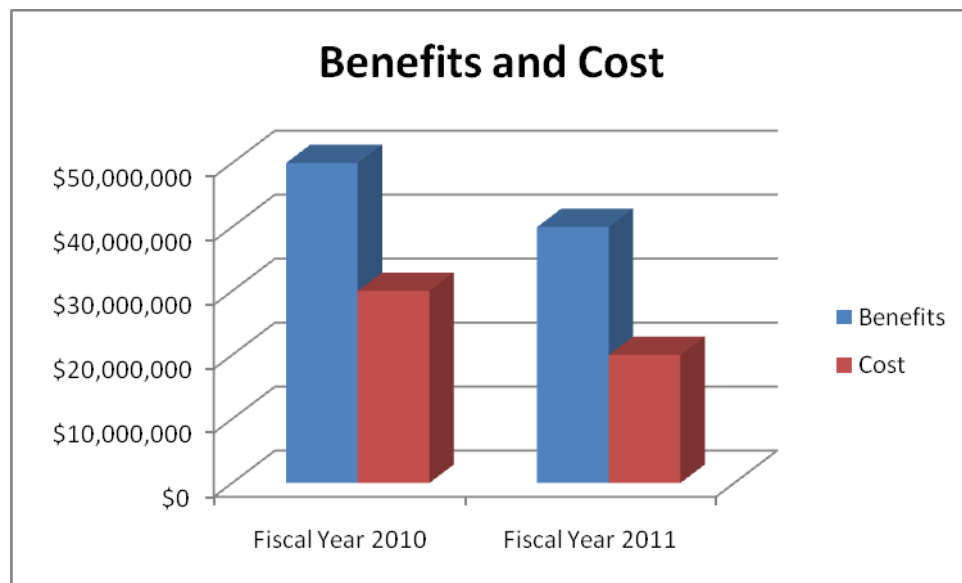
## In This Section

## Project Finance Group Aggregate

You can generate a finances group aggregate report by using the filter and output options. 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.

 For more information on filtering, see topic Using Finance Aggregate Report Filters.

### Output Parameters

You can select the report format, choose to break down finance details by organization, and select the output columns to display. 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 | Percent Completion 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, Ryar | 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. | | | | | | | |

## Project Finances Element Aggregate

You can generate a finances element aggregate report by using the filter and output options.

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.

For more information on filtering, see topic Using Finance Aggregate Report Filters.

### Output Parameters

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

### Sample Report

## Project Finances Element Monthly Detail

You can generate a finances element monthly detail report by using the filter and output options.

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.

For more information on filtering, see topic Using Finance Aggregate Report Filters.

### Output Parameters

You can select the starting month, number of months, report format, choose to break down finance details by organization, and select the output columns to display. 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 | 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 |
| | 21 | Develop New Mod Agi | Information Technology | Active | | Effort-based (Actual vs. Planned Effort for All Children) | Al Van | Ag | IT | Info Tech | |

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## Resource Reports (Detail Reports)

## In This Section

### 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 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



## 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 underutilized, 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 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 underutilized, 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**



## Heat Map by Project

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.
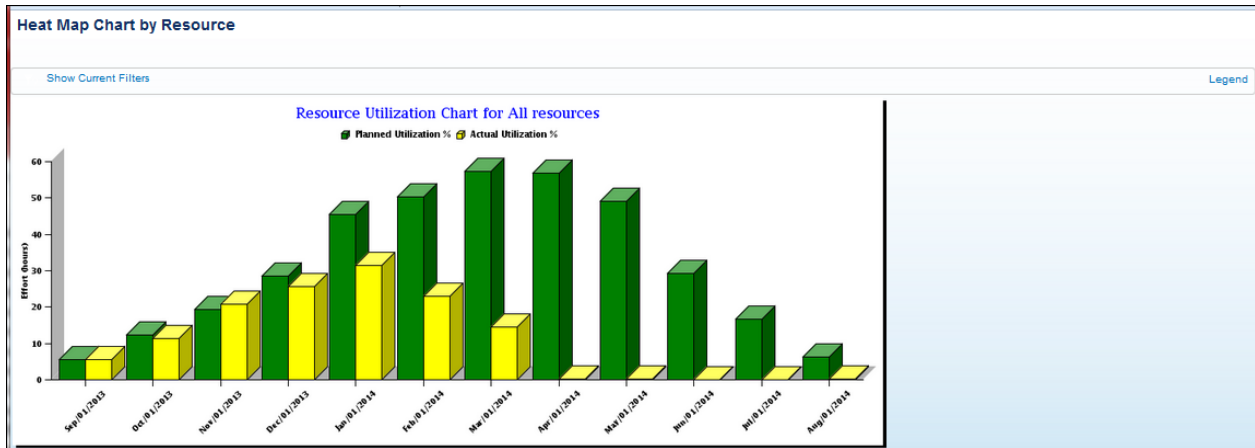
**Filter Parameters**

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**



## 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.
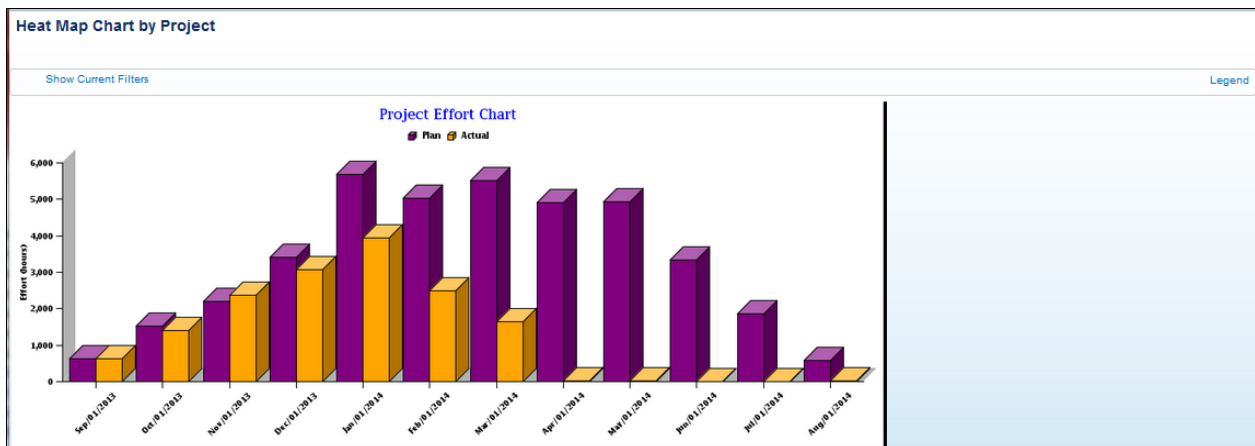
**Filter Parameters**

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 mode (percentage or total), display planned, display actual, display capacity, display requested, display committed, and display total demand.

**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, display actual, display capacity, display requested, display committed, and display total demand.

**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**

## Resource Allocation Report

Based on your filters, this report displays the resource allocation. It shows the project ID, project name, project role, resource name, status, approval role, duration, percentage/effort, pending/unapproved requested effort for resource from, pending/unapproved requested effort to, approved/committed effort for resources from, approved/committed effort for resources to, preferred users, preferred skills, pending/unapproved requested effort for resources%, approved/committed effort for resources, rate $, pending/unapproved requested effort for resource $, and approved/committed effort for resources $.

### Filter Parameters

You can filter on 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 is CSV and HTML.

▶ Row Filters: display projects, display proposals, display assigned allocations, display unassigned allocations, display named resources, and display TBD assignments.

### Sample Report



### 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 initiative, pull-down status, timesheet basics, project basics, project custom fields,   project organization hierarchy, project team, finances, and program. You can filter on project team, only if one initiative is selected.

**Output Parameters**

You can select the report format, choose to compress the output, display cost, display project overhead categories and activity details, hide rows with zero effect, and display overtime in separate columns. The output hours to display is determined by the date range selected in the Filter tab. An error message displayed if the output hours if not within supported range. You can select from one of the following options:

▶ **By Day of Week**: if the date range is less than a week. This option displays the report output by day for a one week period.
▶ **By Week**: if the date range is more than a week, but less than 6 weeks. This output displays columns for each week.
▶ **By Month**: if the date range is less than 12 months. This output displays columns for each month.
▶ **By Total**: if the date range is more than 12 months. This output displays the total hours for the selected date range on a weekly basis.

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

## Sample Report (By Day of Week)

**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 |

## Sample Report (By Week)

**Timesheet Report by Project**

Show Current Filters

| Project Name | Role | Team Member | Week of Apr/03/2016 | Week of Apr/10/2016 | Week of Apr/17/2016 | Week of Apr/24/2016 | Week of May/01/2016 | Week of May/08/2016 | Total Apr/03/2016 - May/14/2016 |
|---|---|---|---|---|---|---|---|---|---|
| **Receivables Dunning Upgrade** | | | **0** | **0** | **0** | **0** | **10** | **35** | **45** |
| | DBA | Allen, Pierce | 0 | 0 | 0 | 0 | 0 | 20 | 20 |
| | Network Admin | Adams, Don | 0 | 0 | 0 | 0 | 10 | 0 | 10 |
| | IT Resource | Kimball, Marie | 0 | 0 | 0 | 0 | 0 | 15 | 15 |
| **Agent Reporting Tool (RMMM4-5)** | | | **0** | **0** | **30** | **20** | **22** | **33** | **105** |
| | DBA | Allen, Pierce | 0 | 0 | 0 | 20 | 12 | 15 | 47 |
| | Network Admin | Adams, Don | 0 | 0 | 30 | 0 | 10 | 10 | 50 |
| | IT Resource | Kimball, Marie | 0 | 0 | 0 | 0 | 0 | 8 | 8 |
| **Oracle 12i upgrade for Marketing** | | | **0** | **0** | **0** | **20** | **5** | **4** | **29** |
| | DBA | Allen, Pierce | 0 | 0 | 0 | 20 | 5 | 0 | 25 |
| | Network Admin | Adams, Don | 0 | 0 | 0 | 0 | 0 | 4 | 4 |
| **Commercial Banking Web Apps enhancements** | | | **0** | **0** | **0** | **0** | **0** | **8** | **8** |
| | IT Resource | Kimball, Marie | 0 | 0 | 0 | 0 | 0 | 8 | 8 |
| **Microfiche Conversion** | | | **0** | **0** | **10** | **0** | **16** | **22** | **48** |
| | DBA | Allen, Pierce | 0 | 0 | 0 | 0 | 16 | 10 | 26 |
| | Network Admin | Adams, Don | 0 | 0 | 10 | 0 | 0 | 4 | 14 |
| | IT Resource | Kimball, Marie | 0 | 0 | 0 | 0 | 0 | 8 | 8 |
| **Total** | | | **0** | **0** | **40** | **40** | **53** | **102** | **235** |

Close

## Sample Report (By Month)

**Timesheet Report by Project**

Show Current Filters

| Project Name | Role | Team Member | Apr/16 | May/16 | Total<br>Apr/01/2016 - May/31/2016 |
|---|---|---|---|---|---|
| Receivables Dunning Upgrade | | | 0 | 45 | 45 |
| | DBA | Allen, Pierce | 0 | 20 | 20 |
| | Network Admin | Adams, Don | 0 | 10 | 10 |
| | IT Resource | Kimball, Marie | 0 | 15 | 15 |
| Agent Reporting Tool (RMMM4-5) | | | 50 | 55 | 105 |
| | DBA | Allen, Pierce | 20 | 27 | 47 |
| | Network Admin | Adams, Don | 30 | 20 | 50 |
| | IT Resource | Kimball, Marie | 0 | 8 | 8 |
| Oracle 12i upgrade for Marketing | | | 20 | 9 | 29 |
| | DBA | Allen, Pierce | 20 | 5 | 25 |
| | Network Admin | Adams, Don | 0 | 4 | 4 |
| Commercial Banking Web Apps enhancements | | | 0 | 8 | 8 |
| | IT Resource | Kimball, Marie | 0 | 8 | 8 |
| Microfiche Conversion | | | 10 | 38 | 48 |
| | DBA | Allen, Pierce | 0 | 26 | 26 |
| | Network Admin | Adams, Don | 10 | 4 | 14 |
| | IT Resource | Kimball, Marie | 0 | 8 | 8 |
| Total | | | 80 | 155 | 235 |

Close

## Sample Report (Total)

**Timesheet Report by Project**

Show Current Filters

| Project Name | Role | Team Member | Total<br>Apr/03/2016 - May/14/2016 |
|---|---|---|---|
| Receivables Dunning Upgrade | | | 45 |
| | DBA | Allen, Pierce | 20 |
| | Network Admin | Adams, Don | 10 |
| | IT Resource | Kimball, Marie | 15 |
| Agent Reporting Tool (RMMM4-5) | | | 105 |
| | DBA | Allen, Pierce | 47 |
| | Network Admin | Adams, Don | 50 |
| | IT Resource | Kimball, Marie | 8 |
| Oracle 12i upgrade for Marketing | | | 29 |
| | DBA | Allen, Pierce | 25 |
| | Network Admin | Adams, Don | 4 |
| Commercial Banking Web Apps enhancements | | | 8 |
| | IT Resource | Kimball, Marie | 8 |
| Microfiche Conversion | | | 48 |
| | DBA | Allen, Pierce | 26 |
| | Network Admin | Adams, Don | 14 |
| | IT Resource | Kimball, Marie | 8 |
| Total | | | 235 |

Close

## 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. If you select to view non-project overhead categories, you can view the non-project time reporting categories and the non-working time reporting categories.

### Filter Parameters

You can filter on initiative, pull-down status, timesheet basics, resource basics, resource custom fields, resource organization hierarchy, project team, finances, and program. You can filter on project team, only if one initiative is selected.

### Output Parameters

You can choose to compress the output, display cost, display project overhead categories and activity details, display non project overhead categories, hide rows with zero effect, and display overtime in separate columns. The output hours to display is limited by the date range selected in the Filter tab. An error message displayed if the output hours if not within supported range. You can select from one of the following options:

- ▸ **By Day of Week**: if the date range is less than a week. This option displays the report output by day for a one week period.
- ▸ **By Week**: if the date range is more than a week, but less than 6 weeks. This output displays columns for each week.
- ▸ **By Month**: if the date range is less than 12 months. This output displays columns for each month.
- ▸ **By Total**: if the date range is more than 12 months. This output displays the total hours for the selected date range on a weekly basis.

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 Weekly Status Report

Based on your filters, this timesheet report shows status and approval information for each category (project, non-project, and non-working) along with cost details for each resource by week. It shows the week range, submitter, project number, project start date, reporting category, status, approver, approval date, total hours, standard hours, standard rate, overtime hours, and overtime rate.

**Filter Parameters**

You can filter on pull down status, initiative, timesheet basics, resource basics, resource custom fields, resource organization hierarchy, project 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, hide rows with zero effect.

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

**Sample Report**



## 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, project basics, project custom fields, project organization hierarchy, resource basics, resource filterable custom fields, resource organization hierarchy, finances, and program.

**Output Parameters**

You can also set the following output display 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. You can also select the output custom field to display.

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

**Sample Report**

| | 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 Mc | Allen, Vanessa | IT |
| 6 | Information Technology | Info Tech | 10 | Apps | 20 | Sales | | NA | 20 | 21 | Develop New Mc | Allen, Vanessa | IT |
| 7 | Information Technology | Info Tech | 10 | Apps | 20 | Sales | | NA | 20 | 21 | Develop New Mc | Allen, Vanessa | IT |
| 8 | Information Technology | Info Tech | 10 | Apps | 20 | Sales | | NA | 20 | 21 | Develop New Mc | Allen, Vanessa | IT |
| 9 | Information Technology | Info Tech | 10 | Apps | 20 | Sales | | NA | 20 | 21 | Develop New Mc | Allen, Vanessa | IT |
| 10 | Information Technology | Info Tech | 10 | Apps | 20 | Sales | | NA | 20 | 21 | Develop New Mc | 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 |
| | Continuous Improvement | Finance | 20 | Con Improvement | | Finance | | Global | | 54 | Approve to Hire | Vardakis, Lonie | Si Sigma |

## Timesheet Corrections Detail Report

The Timesheet Corrections Detail Report displays a detailed report with correction data for all timesheets that were corrected after the timesheet close period. If no correction dates are entered, then the correction data for the current week is displayed.

**Filter Parameters**

You can filter by initiative, timesheet basics, project basics, project custom fields, project organization hierarchy, resource basics, resource filterable custom fields, resource organization hierarchy, finances, and program.

**Output Parameters**

You can also set the following output filters: Compress Output, Show Cost, Show Project Overhead Categories, Show Activity Details Show Non-project Overhead 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. You can also select the output custom field to display.

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

**Sample Report**

| Project Id | Project Name | Time Category | Activity | Resource | Actual Standard Effort from Dec/06/2015 to Dec/12/2015 corrected in the period from Dec/13/2015 to Dec/19/2015 | Old Standard Effort from Dec/06/2015 to Dec/12/2015 corrected in the period from Dec/13/2015 to Dec/19/2015 | Corrected Standard Effort from Dec/06/2015 to Dec/12/2015 corrected in the period from Dec/13/2015 to Dec/19/2015 |
|---|---|---|---|---|---|---|---|
| | | Non Project Time | Training | Adams, Don | 8 | 0 | 8 |
| | | Non Working Time | Holiday | Adams, Don | 8 | 0 | 8 |
| 8 | Agent Reporting Tool (RMMM4-5) | Project Time | Project Management | Adams, Don | 24 | 40 | -16 |

# User Defined Excel Reports

User-Defined Excel Reports (also referred to as Composite reports) use 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 and a source for real-time data across your entire organization) to generate reports. 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.   You can also view the history, email and share these reports.

**In This Section**

## 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**.

## In This Section

## 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**.

## Setting Filters

To set filters:

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

## Running Ad-Hoc Reports

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. |
| Project Template | A template for project reports.<br>**Note:** The Current Phase column is populated only if the project roadmap is gated. |
| 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

## In This Section

## Where to Get Documentation

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

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

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

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

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

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

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.

# Legal Notices

Oracle Instantis EnterpriseTrack Report User Guide