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PRIMAVERA

New Features in EnterpriseTrack 16.1

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New Features in Instantis EnterpriseTrack 16.1

The screenshot displays the Instantis EnterpriseTrack 16.1 interface. The main window shows 'Project Monthly Finances (All Financials in USD)' with a table of financial data across months from Jun'16 to Mar'17. Overlaid on this are two modal windows:

Bulk Finance Locking: A dialog box titled 'Global Finance Locking' with options to 'Set Global Finance Lock Month' and 'Set Temporary Global Lock for All Finance Months Now'. It includes a 'Finance View to Lock' dropdown set to 'Actual' and a 'Select Month' field.

Reassign Team Member: A dialog box explaining that reassigning a team member makes the current one inactive and the new one active. It shows the 'Current Team Member' as 'Network Admin - Bird, Sue' and the 'Select New Team Member' as 'Chin, Steve'. Below this is a table of activities:

Activity	Type
Ta - AA	Task
Del-B	Deliverable
Del-C	Deliverable

At the bottom of the Reassign dialog, there is a 'Locks' table:

Lock Type	Criteria	Edit	Delete
16	Org Hierarchy	Business Unit/Corporate	Edit Delete

Key enhancements in Instantis EnterpriseTrack 16.1 include:

- New finance module functionality
- Detailed finances on proposals
- Resource cost calculations in proposal budget
- Double View finance templates
- Bulk finance locking
- Bulk finance snapshots
- New custom field types
- Tool Tip functionality for custom fields
- Report enhancements
- Performance enhancements
- Integration enhancements
- User Interface improvements
- Timesheet improvements
- Mobile enhancements

Proposal Finance Enhancements

EnterpriseTrack 16.1 enables the use of detailed finance templates on proposals, expanding finance capabilities from the previous summary view to a fully detailed view. This enhancement enables a more comprehensive project planning process.

Rather than entering lump cost and benefit estimates for the prospective project as a whole, you can now enter monthly values for each configured budget category at the project request level. You can also include estimated resource costs in the budget. When the proposal is converted to a project, EnterpriseTrack takes a snapshot of the financial data (labeled Budget) and rolls it into the project where it can be reforecast and tracked separately from actual costs for better project accountability.

Legacy EnterpriseTrack users can continue to use the old summary style financials on proposals if they choose to.

The screenshot displays the 'Proposal Monthly Finances (All Financials in USD)' interface. It features a navigation bar with tabs for Basic Details, Proposal Custom Fields, Statements and Notes, Financials, Dates/Durations, Evaluation, Documents and Links, and Settings. The Financials tab is active, showing a table with columns for months from Jul'16 to May'17. The table lists various categories such as Benefits, Cost, Team Finance Category, and Soft Dollar, with sub-categories. A callout box points to the table with the text: 'EnterpriseTrack 16.1 enables detailed finances on proposals.'

Category	Jul'16	Aug'16	Sep'16	Oct'16	Nov'16	Dec'16	Jan'17	Feb'17	Mar'17	Apr'17	May'17
Benefits	\$34,385.00	\$34,385.00	\$34,385.00	\$34,385.00	\$34,385.00	\$34,385.00	\$34,785.00	\$34,785.00	\$34,785.00	\$34,785.00	\$34,785.00
Category 1	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00	\$33,085.00
Category 2	\$1,300.00	\$1,300.00	\$1,300.00	\$1,300.00	\$1,300.00	\$1,300.00	\$1,700.00	\$1,700.00	\$1,700.00	\$1,700.00	\$1,700.00
Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Team Finance Category	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Soft Dollar	\$685.00	\$685.00	\$685.00	\$685.00	\$685.00	\$685.00	\$675.00	\$675.00	\$675.00	\$675.00	\$675.00
Category 1	\$685.00	\$685.00	\$685.00	\$685.00	\$685.00	\$685.00	\$675.00	\$675.00	\$675.00	\$675.00	\$675.00
Category 2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Group4	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Category 2	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$34,385.00	\$34,385.00	\$34,385.00	\$34,385.00	\$34,385.00	\$34,385.00	\$34,785.00	\$34,785.00	\$34,785.00	\$34,785.00	\$34,785.00

To access this feature: Ensure that Finances on Proposals is enabled on the financial template used for the proposal. In the Financials section of the Proposal Details page, click View Detailed Finances.

Project Finance Enhancements

EnterpriseTrack 16.1 offers a new Double View on the project Detailed Finances tab that provides a true distinction between Plan and Actual values, helping streamline and clarify finance management in the application. The Double View is enabled in the finance template associated with the project.

- Plan refers to values expected to be expended in association with project work.
- Actual refers to values actually expended in the course of project work. Both Plan and Actual values can be edited directly.

A third view, Forecast, is a combination of the Actual view from the project start to the finance lock date and the Plan view from the lock date to the end of the project. The double view allows you to compare Plan or Actual values with Forecast or Snapshot values in alternating table columns.

The Summary tab on the Project Finances page has also been enhanced to provide a more concise way to compare Plan and Actual values for the current fiscal year and the total project. The tab includes dynamic variance tables that enable you to compare Plan or Actual values with Forecast or Snapshot values. Legacy customers who choose to use the basic single view can continue to do so.

Project Monthly Finances (All Financials in USD)

Summary Detailed Finances Validation Settings

Main View View Type: Forecast Snapshot or Current: Current

Comparison View: Plan Budget

Now you can compare Plan or Actual values with Forecast or Snapshot values in alternating table columns.

Category	Jun'16	Jul'16	Aug'16	Sep'16
Benefits	\$68,070.0	\$34,385.0	\$36,303.3	\$34,385.0
Category 1	\$67,720.0	\$33,085.0	\$35,583.3	\$33,085.0
Category 2	\$350.00	\$1,300.00	\$720.00	\$1,300.00
Cost	\$0.00	\$0.00	\$0.00	\$0.00
Team Finance Category	\$0.00	\$0.00	\$0.00	\$0.00
Activity Non-Resource Finance Catg	\$0.00	\$0.00	\$0.00	\$0.00
Activity Resource Finance Category	\$0.00	\$0.00	\$0.00	\$0.00
Capital Expense	\$0.00	\$0.00	\$0.00	\$0.00
Operational Expense	\$0.00	\$0.00	\$0.00	\$0.00
Soft Dollar	\$750.00	\$685.00	\$468.00	\$685.00
Category	\$750.00	\$685.00	\$468.00	\$685.00

To access this feature: For a project with a finance template in which the Double View (Plan and Actual) data entry mode is enabled, click the Finances icon on the Left Navigation bar or click Go To, Finances, Monthly, Plan on the Project menu on the Top Navigation bar.

Bulk Finance Locking and Snapshots

EnterpriseTrack 16.1 provides two new features -- Bulk Finance Locking and Bulk Finance Snapshots -- that help administrators and finance managers work more quickly and efficiently. Instead of having to lock finances or take snapshots on a project by project basis, users with the Manage Global Financial Settings permission can now perform either action at a bulk level. Locking and snapshots can be done globally, by initiative, or by a specified level of the organizational hierarchy. In support of the new Double View on the project Detailed Finances tab, locks can be specified for a particular view -- Actual, Plan, Basic (single view), or All -- while snapshots automatically capture separate Actual and Plan views (or Current view for legacy single-view users) at the same time.

Every snapshot created in EnterpriseTrack 16.1 (both bulk and single) is given a system-generated name to provide consistency and make tracking individual snapshots easier.

The screenshot displays three main configuration panels in the EnterpriseTrack 16.1 interface:

- Global Finance Locking:** Features a 'Finance View to Lock' dropdown set to 'Actual', checkboxes for 'Set Global Finance Lock Month' and 'Set Temporary Global Lock for All Finance Months Now', a 'Select Month' dropdown, and 'Update' and 'Cancel' buttons.
- Bulk Finance Locking:** Similar to the global panel but includes 'Initiative' and 'Org Hierarchy' dropdowns (both set to 'Unassigned'), and checkboxes for 'Set Bulk Finance Lock: Month' and 'Set Temporary Lock for All Finance Months Now'.
- Active Global and Bulk Finance Locks:** A table listing active locks.

Below the locking panels is a table titled "Active Global and Bulk Finance Locks":

View	Temporary?	Lock Month	Lock Type	Criteria
All	No	September 2016	Org Hierarchy	Business Unit/Corp

Overlaid on the right is a **Bulk Finance Snapshots** configuration panel with a callout bubble stating: "Bulk finance locking and snapshots help administrators and finance managers work more efficiently." The snapshot panel includes:

- Snapshot Type:** Radio buttons for Global, Initiative, and Org Hierarchy.
- Initiative:** Dropdown menu set to 'Six Sigma'.
- Org Hierarchy Level:** Dropdown menu set to 'Division'.
- Org Hierarchy Value:** Dropdown menu.
- Snapshot Details:** A required 'Snapshot Name' text field and a larger 'Snapshot Description' text area.
- Buttons:** 'Create Snapshot' and 'Cancel' buttons.

To access these features: Click Finance Settings, Locking/Snapshots on the Go To menu on the Top Navigation bar.

Proposal Signoff Report

The process of converting a proposal to a project can be delayed because requested proposal team signoffs are not secured in a timely manner. EnterpriseTrack 16.1's new Proposal Signoff Report addresses this issue by enabling stakeholders to view signoff status for every proposal in the system. Comprehensive filter options enable filtering by signoff type and status.

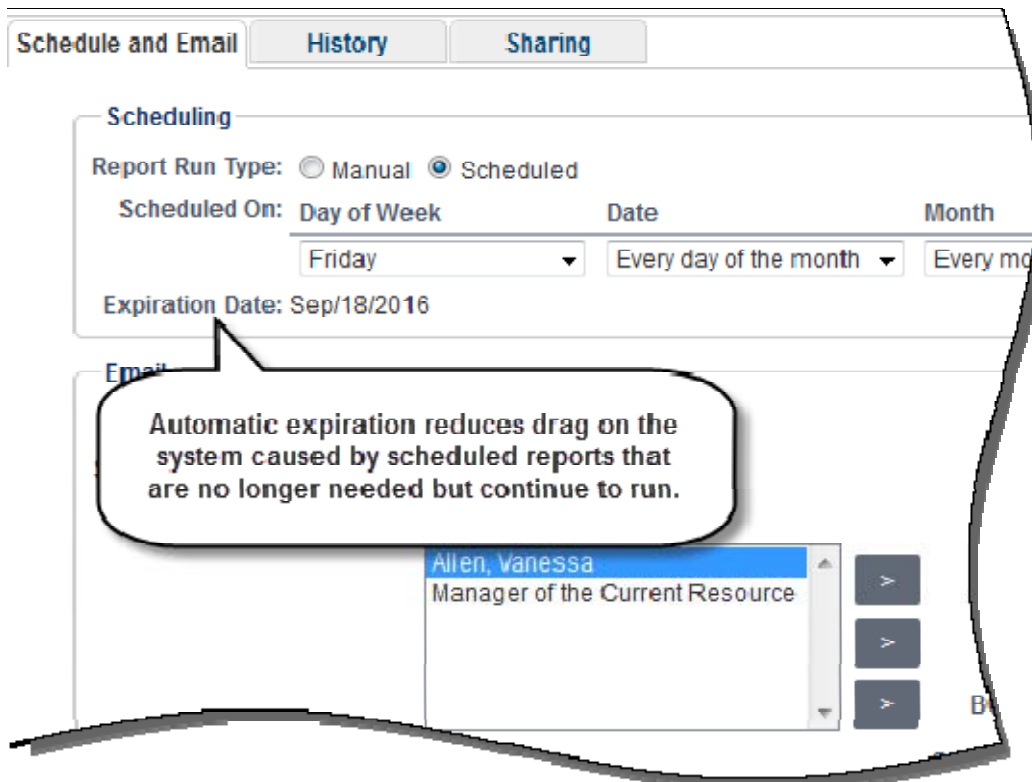
Role	Member	Signoff Type	Signoff Status	Comments
Test Role Approval Required		Signoff Optional	Open	
Test IT Manager		Signoff Optional	Open	
Test Analyst		Signoff Optional	Open	
Test Finance Rep		Signoff Optional	Open	
Test Project Manager	Allen, Vanessa	Signoff Required	Open	

The new Proposal Signoff Report displays signoff type and status for all proposals in the system.

To access this feature: The Proposal Signoff Report is included in Standard Reports and can be accessed on the Manage Reports page.

Scheduled Report Expiration

Scheduled reports -- forgotten by their owners -- often continue to run in the background, drawing system resources from other processes and degrading overall performance. In response to this, EnterpriseTrack 16.1 provides automatic expiration of scheduled reports. Daily reports expire after 30 days, weekly reports after three months, monthly reports after one year, and yearly reports after one run. An email is sent to the report owner and/or specified recipients on the day of a report's expiration to enable continuation of the report if desired.



To access this feature: Click the Schedule and Email details tab for a selected report on the Manage Reports page.

Reassign Team Member

EnterpriseTrack 16.1's Reassign Team Member feature allows you to deactivate a project team member and reassign that person's role to a new team member. Deactivated team members can retain their actuals on activities that are still in progress as well as previous timesheet data. Roles that require approval and activities for which current timesheet data exists cannot be reassigned.

Project Resources

Resource List | **Resource Plan** | Gantt

Action	Role	Last Name	First Name
✕	✕	▼ ✕	▼ ✕
Actions ▼	Project Manager	Adams	Don
Actions ▼	DBA	Johns	Tony
Actions ▼	Network Admin	Bird	Sue

- Select
- Edit
- Delete
- Finances
- Reassign Activities
- Reassign Team Member**

Reassign a team member role from one resource to another without losing actuals or previous timesheet data.

To access this feature: Click the Actions menu for a team member on the Project Resources listing page.

Link Custom Field Type and Tool Tip

In response to user requests, EnterpriseTrack 16.1 provides a Link custom field type and tool tip capability for all custom field types. You can now create a custom field that includes a URL, and EnterpriseTrack will provide a hyperlink that takes you to the URL.

Field Name * Link Custom Field

Field Type * Unassigned

UI Section Unassigned

Associated Object Float

Initiative Integer

List

Multi List

Text

Date

Currency

Boolean

Notes

Visible Global Resource

Label

Display in Filters Calculated Expression

Required Link

Default Value

Minimum

Maximum

Tool Tip Add a URL to this field.

Sort Order * 100 Order of Existing Fields

Proposal Custom Field Mapping None

Create Cancel

EnterpriseTrack 16.1 provides a new Link custom field type...

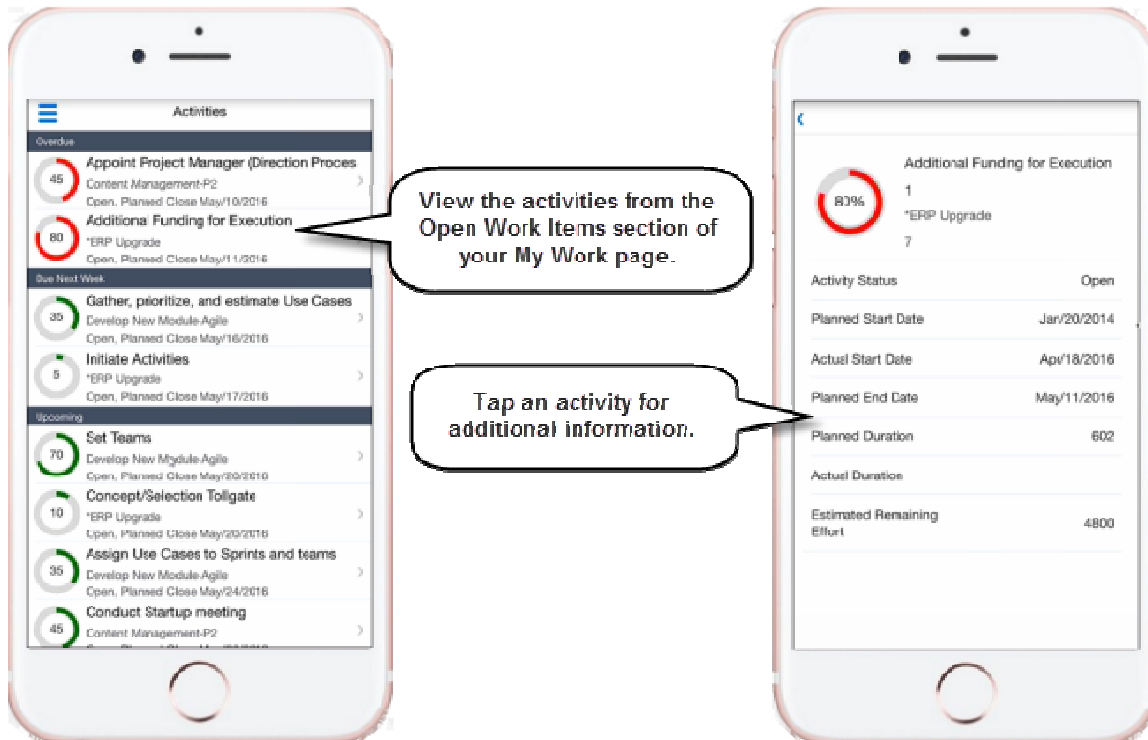
...and Tool Tip capability for all custom fields.

To access this feature: Click the Custom Fields link on the Application Configuration tab in the Administration console.

Mobile Enhancements

EnterpriseTrack 16.1 mobile expands beyond its previous timesheet and dashboards capabilities by adding new activities and projects functionality.

Upon logging in to the mobile application, you are presented with the list of activities on your My Work page under the Open Work Items section. Activities are grouped by due date -- Overdue, Due Today, Due Next Week, and Upcoming -- and each activity displays basic information, such as activity name, project name, activity status, and planned finish date. Percent complete for the activity is displayed via a colored graphical circle -- green for on time, red for overdue. Tap an activity for additional detailed information, including planned and actual start dates, planned duration, actual duration, and estimated remaining effort.



Mobile Enhancements

Use the left navigation to access your My Projects list. Projects are grouped by initiative and, like activities, display a colored percent complete indicator as well as basic information, such as project status and planned finish date. My Projects is the default listing, but you can also create saved searches in EnterpriseTrack for use with the mobile app. Tap a project for additional information, including current progress, actual start, initial planned finish, current planned finish, planned and actual finances, and total and overdue activities, issues, and risks.



To access this feature: Download the EnterpriseTrack 16.1 iPhone or Android app and sync it to your EnterpriseTrack 16.1 account.

Other Enhancements

Finance Categories and Elements

The following out-of-the-box finance categories and elements are renamed:

- Team Based Category is renamed Project Team Expenses
- Operational Expense-Resource Activity Based Finance Category is renamed Resource Expenses From Activities (Operational Expense)
- Capital Expense-Resource Activity Based Finance Category is renamed Resource Expenses From Activities (Capital Expense)
- Resource Activity Based Finance Category is renamed Resource Expenses From Activities (Not Specified)
- Non-resource Activity Based Finance Category is renamed Non-Resource Expenses From Activities

In addition, support is added to delete unused expense categories.

Finance Reports and Dashboard Filter Enhancements

Reports and Dashboard filters are updated to support the new double-view capabilities of the finance templates.

Performance Enhancements

Multiple performance improvements have been achieved to improve usability, such as:

- User notification in case of system error
- Social Stream notifications
- Data export for proposals and projects improved

UI Enhancements

EnterpriseTrack 16.1 provides multiple UI changes to improve usability and create consistency with other Oracle Primavera products. Changes include:

- New login page
- Icons added to the Project Create menu on the Top Navigation bar
- Improved consistency between the Left Navigation bar and menus on the Top Navigation bar
- Minimum width set for Global Search results list
- Darkened background removed from toolbars
- New alert message on the Login page
- Improved administration of the Ideas portal Welcome page
- Assign Owner in Quick Edit
- Type ahead for custom field lists
- Auto-complete capability for program, idea, and strategy Owner fields

Timesheet Enhancements

EnterpriseTrack 16.1 provides multiple timesheet enhancements to improve usability, such as:

- New resource-type timesheet filters
- Monthly/weekly Timesheet Report options
- Display output hours on the Timesheet Report
- Timesheet Report by Project
- Timesheet Report by Resource

Other Enhancements

Customization Generalization

Multiple enhancements that had been customized at the request of existing clients have been generalized as standard features for all EnterpriseTrack deployments. Such enhancements include:

- Updating ideas and proposals via data upload
- Converting pre-defined custom fields to user-defined custom fields
- Deleting user-defined custom fields
- Making unused Metric Type fields inactive (archived or invalid)
- Editing of initiative or global selection for custom fields
- Additional custom field types

Report Enhancements

- Project Evaluation report displays evaluation criteria for projects
- Project listing by Alignment displays projects and their associated alignments
- Alignment Tree reporting displays all objects associated with an alignment
- Updates to filters and output columns on listing reports
- Addition of custom fields to listing reports
- New fields on Resource Listing report
- Show Project Dates option added to the Project Listing report

Integration Enhancements

- New CRUD Proposal and Idea API objects
- Support for Problem and Statement fields in existing Project API object
- Integration APIs supported in both Reconfigure and Production modes