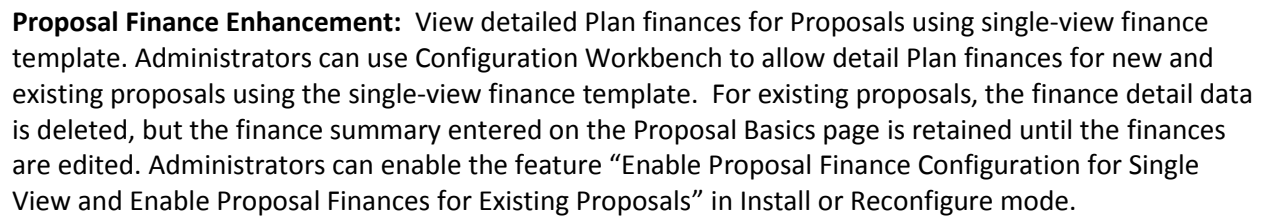


New Features in Instantis EnterpriseTrack 17.3



General Details

Finance Template Name*

Single view Finance Template

Description*

Default template

Initiative:

Global

Finance Tracking Details

Finance Tracking Months*

12

Default Finance Tracking Start Date*

Project Start Date

Use Global Finance Lock Month

☒ Yes ☐ No

Finance Data Entry Details

Finance Edit Mode*

Monthly

Additional Finance Timescale Display*

Yearly

Data Entry Mode

Single View (Basic Only)

Proposal Finances Enabled

☒ Yes ☐ No

Resource Computation Enabled

☐ Yes ☒ No

Resource Computation Mechanism

Convert Currency Value

Column Header Labels

Done

[illegible]

Evaluation Criteria Enhancement: Administrators can use the Configuration Workbench to edit the % weight for the dimensions associated with an evaluation criterion. For initiatives with two dimension criteria, the % weight of the second dimension criteria is automatically calculated based on the value entered for the first criteria. The dimension weights are displayed on the Evaluation Dimension list and on the Proposal and Project Basics page. Administrators can edit the dimension weights in Install or Reconfigure modes.

Configuration Workbench: Edit Proposal Dimension Criteria

Proposal Dimension Name*
Sort Order*
Low Value*
High Value*
Weight* % (Percentage)
Chart* x

Evaluation

| Item | Item Impact | Impact Weight |
|--|-------------|---------------|
| Project Attractiveness (weight = 40%) Help | | |
| ■ Financial Impact | 3 | 45% |
| ■ Management Commitment | 3 | 35% |
| ■ Urgency | 3 | 20% |
| Total Score | 3 | |
| Item | Item Impact | Impact Weight |
| Project Cost (weight = 60%) Help | | |
| ■ People Cost | 3 | 50% |
| ■ Hardware Cost | 3 | 40% |
| ■ Software Cost | 3 | 10% |
| Total Score | 3 | |
| Evaluation Score | 3 | |
| Comments | | |
| Nope. Comments is the last desc field | | |

Other Enhancements

New Standard Reports: Two standard reports are added to the Finance Reports folder.

- **Finance Validation Report:** Use this report to view all project finance validations. The available report formats are HTML, CSV, and MS Excel.
- **Proposal Finance Element Monthly Detail Report:** Use this report to view detail Plan finances for Proposals. The available report formats are HTML, CSV, and MS Excel.

Standard Report Enhancements:

- The Alignment Tree report now displays user-defined fields based on the output filters.
- The following reports are updated with the Last Updated Date/Time filter: Deleted Records Report, Idea Listing, Charter Listing, Project Listing, Last Modified Date Report, Linked Projects, Program Listing, Activity Detail Report, Non-WBS Activity Report, Resource Allocation Report, Project Alignment Report, Alignment Tree Report, Resource Listing Report, and Field Change History Report
- The output for the following reports are enhanced to display additional fields: Idea Listing Report, Program Listing, Project Listing Report, and Charter Listing Report.

API Enhancements: Use the Last Updated Date/Time filter for the following search APIs: Proposal Finance Data, Project Finance Data, Project Finance Snapshot Data and Team Member

Program Enhancements: Administrators can use the Configuration Workbench to change the display name for the Program Manager and Description fields. In addition, they can add user-defined fields to the Statement and Notes section.

Mobile Enhancements: Added support to display user-defined fields for non-WBS activities. The Activities page groups the WBS and non-WBS activities separately.

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Oracle Instantis EnterpriseTrack What's New

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