ORACLE®

Instantis

EnterpriseTrack

Report User Guide
Version 18

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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

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**.

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**.

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 - Unlocked - All (Locked and Unlocked)	Locked: All finance values before the lock date. Unlocked: All finance values after the lock date. All (Locked and Unlocked): All forecast values. This option is not displayed for the Proposal Finance Element Monthly Detail Report.
Finance View	- Plan - Actual - Forecast - Plan or Basic - 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: - 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. - 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. This option is not displayed for the Proposal Finance Element Monthly Detail Report. Only Plan values are displayed.

Date Range	- This Fiscal Year - Previous Fiscal Year - Next Fiscal Year - Any start to end month - All Fiscal Years - Trailing 12 months - Next 12 months - This Fiscal Qtr - Previous Fiscal Qtr - Next Fiscal Qtr - This Fiscal Year Q1 - This Fiscal Year Q2 - This Fiscal Year Q3 - This Fiscal Year Q4 - Current Month - Previous Month - Next Month	The range of months that are used to generate the aggregate value of the Total, Group1, Group 2 etc., columns in the aggregate reports. For Monthly reports, this determines the months that will be populated in the output, all other months will have 0 values. For Annual totals, use one of the different Fiscal Year choices. For Quarterly totals, use one of the different Quarter choices. If you want totals for a particular month, use one of the Month choices. For a range of months, use Any start to end month You can choose aggregation of past or future months.
Snapshot (for Plan) 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. This option is not displayed for the Proposal Finance Element Monthly Detail Report.

Finance Detail Level	- Total - Group - Category - 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. Total: shows only the top level (Total). Group: shows the Group level, one level below Total (up to 5, depends on number of Groups configured) Category: shows the Category level, 2 levels below Total Element: shows the Element level, 3 levels below Total
Show Upper Levels	- Yes - 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. 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 End Month		This filter 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.
Validation Approval Date (From) Validation Approval Date (To)		This filter field displays on the Finance Validation Report. If validation approval dates are entered, only approved validations are returned.

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.

Output Parameters	Description
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. **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%.

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 as they often continue to run in the background, drawing system resources from other processes and degrading overall performance. The **Expired** icon is displayed next to reports that have expired. The expiry date is based on the scheduling frequency. 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. 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.

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

Finance Reports

In This Section

Project Finance Spreadsheet Report

This report generates a project finance report using the specified filter and output options. This CSV report is used in conjunction with the macro in the downloaded template. The Data sheet is an aggregation of project financial data based on the hierarchy configured in the finance template. The default range of the report is the current fiscal year.

Note: You must first download the template before you can view the output in MS 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.

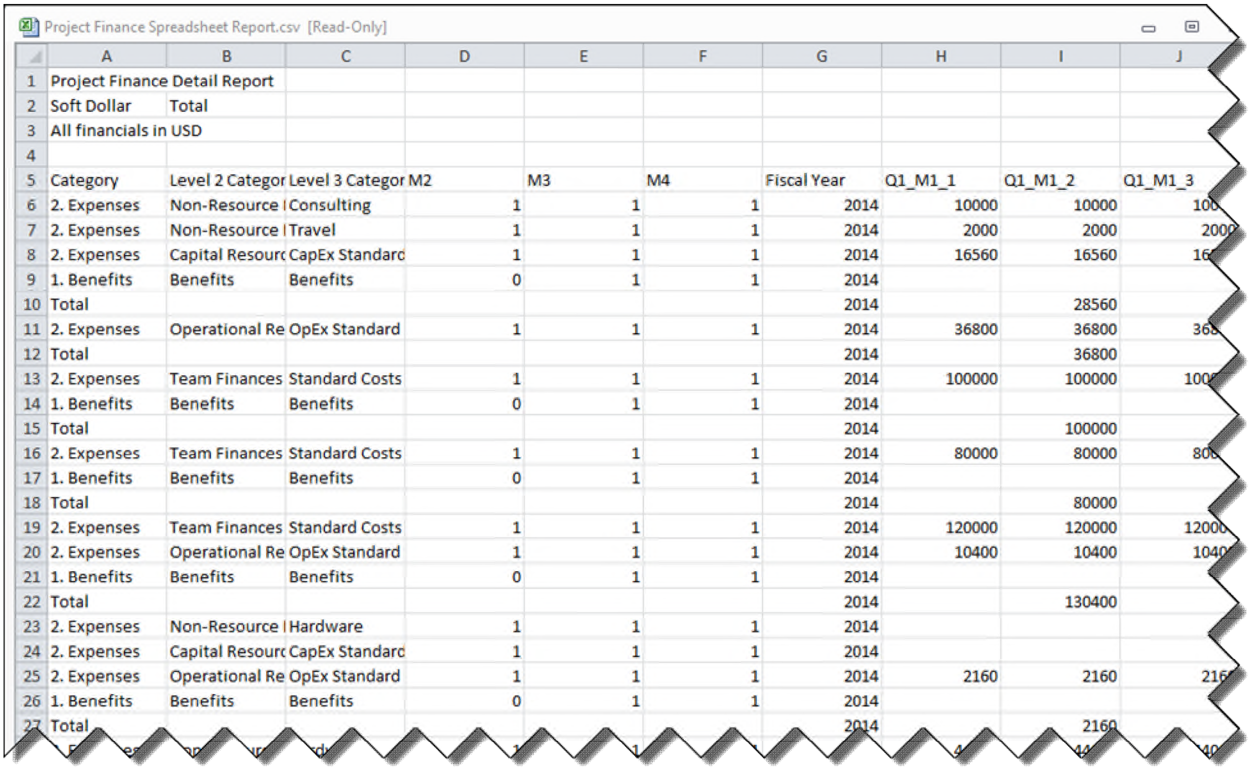
Filter Parameters

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 if the output should be compressed. The report output is in CSV format.

Sample Report



Project Finance Spreadsheet Report.csv [Read-Only]

	A	B	C	D	E	F	G	H	I	J
1	Project Finance Detail Report									
2	Soft Dollar	Total								
3	All financials in USD									
4										
5	Category	Level 2 Categor	Level 3 Categor	M2	M3	M4	Fiscal Year	Q1_M1_1	Q1_M1_2	Q1_M1_3
6	2. Expenses	Non-Resource I	Consulting	1	1	1	2014	10000	10000	100
7	2. Expenses	Non-Resource I	Travel	1	1	1	2014	2000	2000	2000
8	2. Expenses	Capital Resourc	CapEx Standard	1	1	1	2014	16560	16560	16
9	1. Benefits	Benefits	Benefits	0	1	1	2014			
10	Total						2014		28560	
11	2. Expenses	Operational Re	OpEx Standard	1	1	1	2014	36800	36800	36
12	Total						2014		36800	
13	2. Expenses	Team Finances	Standard Costs	1	1	1	2014	100000	100000	100
14	1. Benefits	Benefits	Benefits	0	1	1	2014			
15	Total						2014		100000	
16	2. Expenses	Team Finances	Standard Costs	1	1	1	2014	80000	80000	80
17	1. Benefits	Benefits	Benefits	0	1	1	2014			
18	Total						2014		80000	
19	2. Expenses	Team Finances	Standard Costs	1	1	1	2014	120000	120000	1200
20	2. Expenses	Operational Re	OpEx Standard	1	1	1	2014	10400	10400	104
21	1. Benefits	Benefits	Benefits	0	1	1	2014			
22	Total						2014		130400	
23	2. Expenses	Non-Resource I	Hardware	1	1	1	2014			
24	2. Expenses	Capital Resourc	CapEx Standard	1	1	1	2014			
25	2. Expenses	Operational Re	OpEx Standard	1	1	1	2014	2160	2160	216
26	1. Benefits	Benefits	Benefits	0	1	1	2014			
27	Total						2014		2160	

Project Detail Spreadsheet Report

This report displays a detailed project report using the specified filter and output parameters. This report is designed to be used with the macro in the downloaded template. The Data sheet shows one row per project and the default range of the report is the current fiscal year.

> **Note:** You must first download the template before you can view the output in MS Excel.

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 (I
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

This report displays financial savings by business unit using the specified filter and output options. The report groups projects by Business Unit (second level of the organization hierarchy) and displays the YTD and financial forecast for each project in the In-Realization phase.

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 Summary Report

This report displays the finance summary using the specified filter and output parameters. This report aggregates planed or actual finances by Group, Category, or Element for each fiscal year for all projects based on your filters. Before running this report, you must choose a Finance Template, Finance View, and a Finance Type.

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

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 four 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

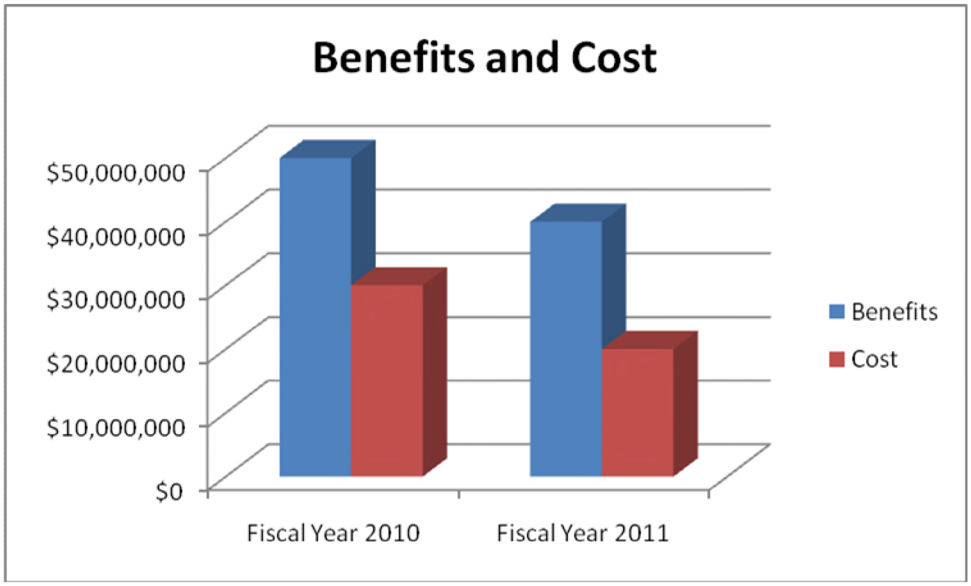
Element 1.1.1

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. This report shows one row per project. It aggregates the Group 1 to Group 5 and Total financial values over a chosen date range based on the filter settings.   Before running this report, you should choose a Finance Template.

Filter Parameters

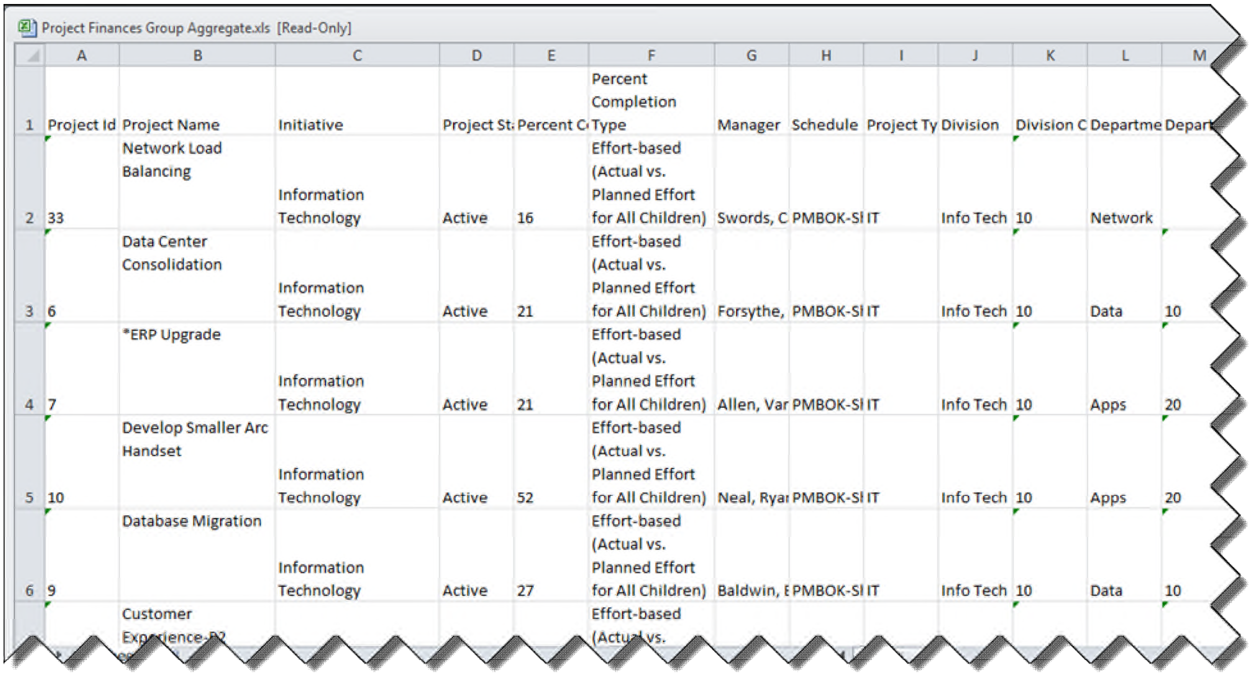
You can filter on pull down status, initiative, project basics, project organization hierarchy, project dates, project classification fields, project custom fields, programs, finances, and finance aggregate definition.

For more information on filtering, see topic Using Finance 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, Ryai	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-R2				Effort-based (Actual vs.							

Project Finances Element Aggregate

You can generate a finances element aggregate report by using the filter and output options. This report shows multiple rows per project - one for each element configured item in the Finance Template. It aggregates finances at the financial detail level (total, group, category, element) based on the filter settings. Before running this report, you should choose a Finance Template.

Filter Parameters

You can filter on 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 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 Aggregate.xls [Read-Only]

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

Project Finances Element Monthly Detail

You can generate a finances element monthly detail report by using the filter and output options. This report shows multiple rows per project - one for each element configured item in the Finance Template. It displays month by month values for the date range based on the filter settings.

Filter Parameters

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

For more information on filtering, see topic Using Finance 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 Chargeba ck Cod
2	33	Network Load Balancing	Information Technology	Active	16	Effort-based (Actual vs. Planned Effort for All Children)	Swords, Carolyn	PMBOK-Short	IT	Info Tech	10
3	6	Data Center Consolidation	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Forsythe, John	PMBOK-Short	IT	Info Tech	10
4	7	*ERP Upgrade	Information Technology	Active	21	Effort-based (Actual vs. Planned Effort for All Children)	Allen, Vanessa	PMBOK-Short	IT	Info Tech	10
5	10	Develop Smaller Arc Handset	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Neal, Ryan	PMBOK-Short	IT	Info Tech	10
6	9	Database Migration	Information Technology	Active	27	Effort-based (Actual vs. Planned Effort for All Children)	Baldwin, Emmet	PMBOK-Short	IT	Info Tech	10
7	16	Customer Experience-P2	Information Technology	Active	52	Effort-based (Actual vs. Planned Effort for All Children)	Ferguson, Bruce	Prince2	IT	Info Tech	10
8	21	Develop New Mod... Agil...	Information Techno...			Effort-based (Actual vs. Planned Effort for All Ch...en)	A... Van...	A...	IT	I... ech	

Proposal Finance Element Monthly Detail Report

You can generate a proposal finances element monthly detail report by using the filter and output options. The number of rows displayed per proposal is controlled by the Finance Detail Level filter. It displays month by month values for the date range based on the filter settings. As this report only supports Plan view, you cannot use this report to compare views. Program filters are displayed only if your administrator has enabled the feature *Allow Proposals in Programs*.

Filter Parameters

You can filter on initiative, proposal basics, proposal organization hierarchy, proposal dates, proposal classification fields, proposal custom fields, finances, program, and program organization hierarchy.

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

Output Parameters

You can select the starting month, number of months, roles, and report format. The report output format choices are CSV, HTML, and MS Excel.

Sample Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Propos	Proposal Na	Initiative	Proposal Sta	Project Man	Project Plan	Project Type	Division	Division Cha	Business Un	Busines	Planned Com	Planned Proj	Planned Star	Last Modified	Last Modifie	Financials U	Budget Sav
2	1	Update ERP	IT	Team Assign	Adams, Don	Software De	Structured -	Developme	5	Sales	10	Apr/10/2018	Feb/28/2018	Oct/19/2017	Oct/18/2017	Adams, D	Yes	35,000.00
3	10	North Camp	IT	Team Assign	Allen, Vane	Agile	Structured -	Developme	5	QA	12	Nov/28/2018	Oct/18/2018	Oct/02/2017	Oct/18/2017	Allen, V	Yes	42,000.00
4																		
5																		

Finance Validation Report

You can generate a report to view all project finance validations (approved and pending approval). This report displays the project ID, project name, validation type, approved date, requested by, requested date, request comments, approved by, and approval comments. If the Validation Approval Date (To) and the Validation Approval Date (From) filters are used, only approved validations are displayed.

Filter Parameters

You can filter on initiative, project basics, project organization hierarchy, project dates, proposal classification fields, proposal custom fields, and finances.

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

Output Parameters

You can select the report format, maximum rows per report, and if the report should be compressed. The report output format choices are CSV, HTML, and MS Excel.

Sample Report

Finance Validation Report

Show Current Filters

Project ID	Project Name	Validation Type	Approved Date	Requested By	Requested Date	Request Comments	Approved By	Approval Comments
22	*Customer Financing Approval Process update	Approve top down project budget	Oct/19/2017 12:01:17 PM	Bowser, George	Oct/19/2017 12:00:06 PM		Dudilla, Vanessa	
28	*20XX SWIFT Mandate update	Approve top down project budget	Oct/19/2017 11:54:49 AM	Bowser, George	Oct/19/2017 11:53:39 AM		Dudilla, Vanessa	

Showing 1 - 2 of 2

Close

Listing Reports

In This Section

Idea Listing Report

Based on your filters, this report displays all ideas in the system. Some of the columns that can display on your report include: 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, idea dates, idea custom fields, 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 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 > >>

Proposal Listing

Based on your filters, this report displays all proposals in the system. Some of the columns that can display on your report include: 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, proposal basics, proposal dates, classification fields, organization hierarchy, finances, proposal custom fields, program, and program organization hierarchy.

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 and HTML.

Sample Report

Proposal Listing

Show Current Filters | Done

Actions	External ID ⬍	Initiative	Proposal ID ▲	Proposal Name ⬍	Proposal Status ⬍	Project Type	Project Plan	Division ⬍	Business Unit ⬍	Sub Unit ⬍	Location ⬍	Region ⬍	Project Manager	Planned Project Start Date ⬍	Actual Project Start Date ⬍	Planned Project Close Date ⬍	Budget Savings or Revenue	Budget Costs	Budget Other or Soft	Budget Capital	Budget Budget	Budget Total	Evaluation Score ⬍
[View Details]	system_generated_2	IT	2	Departmental Cost Evaluation	Team Assigned	Structured - high	IPEC	Corporate	Data	Operations	Australia	Western	Adams, Don									$0.00	0
[View Details]	system_generated_3	IT	3	New Methodology for Component A	Project Created	Structured - high	IPEC	Engineering	Internal	Engineering	North America	United States	Allen, Vanessa	May/16/2016	May/16/2016	Jul/08/2016		$150,000.00		$67,500.00	$25,000.00	$150,000.00	0
[View Details]	1	IT	5	*Cellulose Acetate Microflakes	New	-		Corporate	Consumer	IT	Europe	England	Unassigned					$48,591.00				$48,591.00	0
[View Details]	2	IT	6	Constellation 57	New	-		Corporate	Data	Operations	Australia	Western	Unassigned					$36,251.00				$36,251.00	0
[View Details]	3	IT	7	Constellation 97 LD	New	-		Engineering	Internal	Engineering	North America	United States	Unassigned					$167,548.00				$167,548.00	0

Showing Records 1 - 5 of 18 > >>

Project Listing

Based on your filters, this report displays all projects in the system. Some of the columns that can display on your report include: 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, program, and program organization hierarchy.

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 and HTML.

Sample Report

Project Listing Report

Show Current Filters | Done

Printer Friendly Version

All Financials in USD

Action	External ID	Initiative ⬍	Project ID	Project Name ⬍	Phase	Status ⬍	Division	Department	Customer	Region	Project Type	Schedule	Team Size	Timesheets (#)	Unlocked Finances	Last Validation Date	Evaluation Score
[Edit] [Project Reports]	9	Information Technology	9	Database Migration	Plan/Design-Short	Active	Info Tech	Data	Operations	Global	IT	PMBOK-Short	4	0	$85,000	Thu Jan 01 00:00:00 PST 0050	0
[Edit] [Project Reports]	5	Information Technology	5	Update for GL Journal Transfer	Plan/Design-Short	Active	Info Tech	Operations	Finance	JAPAC	IT	PMBOK-Short	6	0	$120,000	Thu Jan 01 00:00:00 PST 0050	0
[Edit] [Project Reports]	6	Information Technology	6	Data Center Consolidation	Execute/Control-Short	Active	Info Tech	Data	Operations	NA	IT	PMBOK-Short	6	7	$5,000	Thu Jan 01 00:00:00 PST 0050	0
[Edit] [Project Reports]	7	Information Technology	7	*ERP Upgrade	Plan/Design-Short	Active	Info Tech	Apps	Corporate	Global	IT	PMBOK-Short	8	3	$205,900	Thu Jan 01 00:00:00 PST 0050	0
[Edit] [Project Reports]	75	Information Technology	75	West Campus Wireless Upgrade	initiate-Short	Active	Info Tech	Network	Operations	NA	IT	PMBOK-Short	4	0	$12,480	Thu Jan 01 00:00:00 PST 0050	0

Showing Records 1 - 5 of 70 > >>

Printer Friendly Version

Last Modified Date Report

Use the Last Modified Date report to display a list of entities (project, finance, activity, team, and snapshot) that were updated on or after the selected date. For example, if you select Finance, all projects that had finances updated on or before the last updated date are displayed.

Filter Parameters

You can filter on the entity, the last updated date, and last updated time.

Output (Output Parameters)

You can select the report format and the maximum number of rows to display per report

The output choices are CSV, PDF and HTML.

Sample Report

Last Updated Date Report

Show Current Filters

Done

Project ID	Project Name	Last Updated Date
3	Develop New Module-Agile update	2016/12/02
8	West Campus Wireless Upgrade update	2016/12/02
14	*Cellulose Acetate Microflakes update	2016/12/05
15	Force Flex Pill Package Upgrade update	2016/12/02
20	Inter-company Invoicing2 update	2016/12/02
23	Deburring process controls update	2016/12/02
25	S-Heart Stent update	2016/12/02
28	Implement ITFM update	2016/12/02
33	Customer Return & Restocking update	2016/12/02
38	*ERP Upgrade update	2016/12/02

Project Listing Report with Activity List

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

Filter Parameters

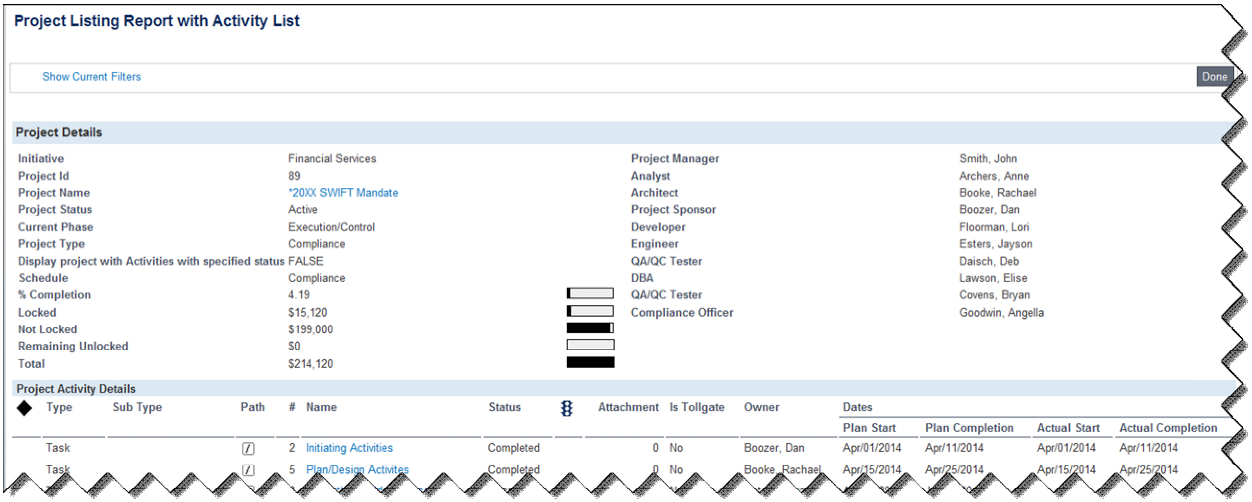
You can filter on pull-down status, initiative, project basics, project dates, organization hierarchy, project custom fields, and activity details like the type, name, status, number of attachments, dates, and the status of milestones.

Output Parameters

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

The output choices are CSV, PDF and HTML.

Sample Report



Project Listing Report with Activity List

Show Current Filters | Done

Project Details

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

Project Activity Details

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

Resource Listing

Based on your filters, this report displays all resources. Some of the columns that can display on your report include: 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, hours-per week, and initiative.

The Hours-Per Week column displays the hours per week a resource can work and is taken from the resource calendar.

Filter Parameters

You can filter on initiative, resource basics, time reporting and rates, resource dates, 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 and HTML.

Sample Report

Resource Listing Report

Show Current Filters

External ID	Last Name	First Name	Middle Name	Login ID	Resource Status	Manager Login ID	Resource Type	Resource Sub Type	Email	Phone	Access Profile	Allowed Roles	Division	Department	Customer	Region	Manager	Initiative
dadams	Adams	Don		dadams	Active	vallen	Person	Employee	noreply@oracle.com		IT PM	Project Sponsor,Project Manager	Info Tech				Allen, Vanessa	Information Technology,Financi Services,Continuou Improvement,New Product Development
maldridge	Aldridge	Mike		maldridge	Active	vives1	Person	Employee	noreply@oracle.com		CI PM	Master Black Belt,Project Manager	Finance	Cont Improvement		NA	Ives, Victoria	Continuous Improvement
pallen	Allen	Pierce		pallen	Active	vallen	Person	Employee	noreply@oracle.com		IT PM	Project Manager	Info Tech				Allen, Vanessa	Information Technology
KL5WRJQQKD668	Allen	Vanessa		vallen	Active	dadams	Person	Employee	noreply@oracle.com	+1-206-555-1212 (Office)	IT Management	Project Sponsor,Project Manager	Info Tech				Adams, Don	Information Technology,Financi Services,Continuou Improvement,New Product Development
calthaus	Althaus	Conrad		calthaus	Active	vives1	Person	Employee	noreply@oracle.com		CI Resource	Process Owner	Finance	Cont Improvement		JAPAC	Ives, Victoria	Continuous Improvement
aanchors	Anchors	Annie		aanchors	Active	vallen	Person	Employee	noreply@oracle.com		IT Resource	Analyst,Analyst-Approval Required	Info Tech				Allen, Vanessa	Information Technology
banders	Anders	Bill		banders	Active	jsmith	Person	Employee	noreply@oracle.com		FS PM	Project Sponsor,Project Manager	Finance				Smith, John	Financial Services
KM5N2LXXX4TS6	Anderson	Dana		danderson	Active	pmonroe	Person	Employee	noreply@oracle.com		NPD Management	Project Manager	Services	Operations			Monroe, Pam	Information Technology,Financi Services,Continuou Improvement,New Product Development

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 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**

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

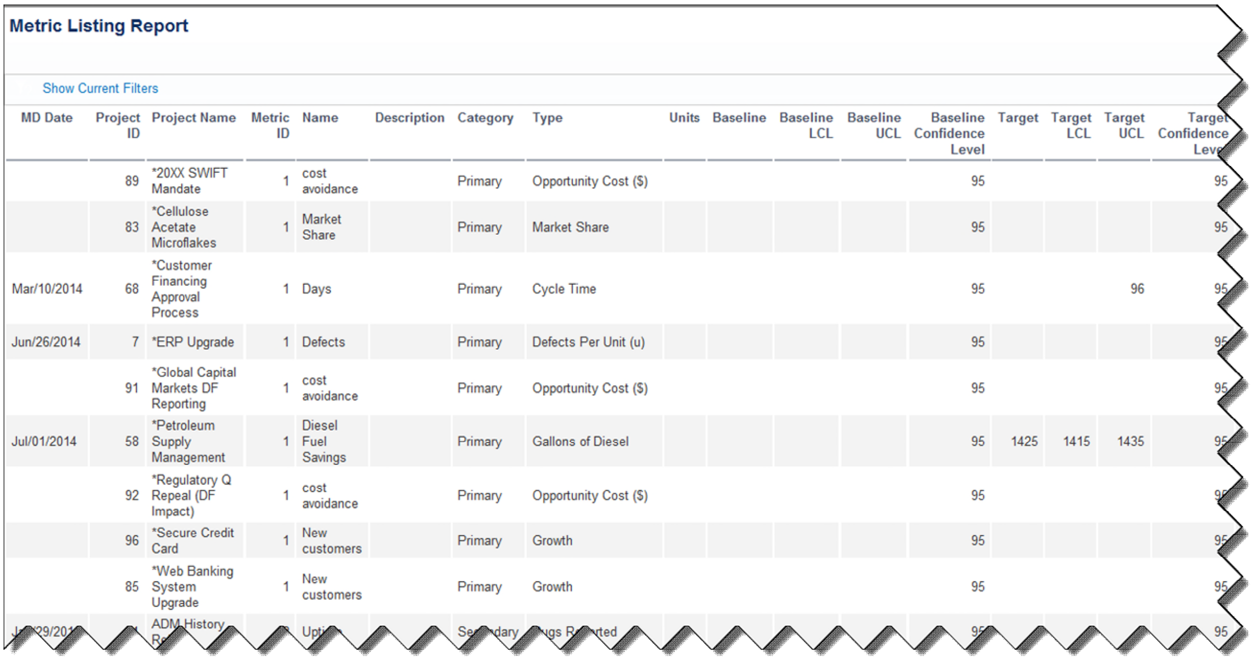
You can filter to show metrics for a specified date range and select the recent number of metric data entries (1 to 50) to display.

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 Leve
	89	*20XX SWIFT Mandate	1	cost avoidance		Primary	Opportunity Cost ($)					95				95
	83	*Cellulose Acetate Microflakes	1	Market Share		Primary	Market Share					95				95
Mar/10/2014	68	*Customer Financing Approval Process	1	Days		Primary	Cycle Time					95			96	95
Jun/26/2014	7	*ERP Upgrade	1	Defects		Primary	Defects Per Unit (u)					95				95
	91	*Global Capital Markets DF Reporting	1	cost avoidance		Primary	Opportunity Cost ($)					95				95
Jul/01/2014	58	*Petroleum Supply Management	1	Diesel Fuel Savings		Primary	Gallons of Diesel					95	1425	1415	1435	95
	92	*Regulatory Q Repeal (DF Impact)	1	cost avoidance		Primary	Opportunity Cost ($)					95				95
	96	*Secure Credit Card	1	New customers		Primary	Growth					95				95
	85	*Web Banking System Upgrade	1	New customers		Primary	Growth					95				95
[illegible]	[illegible]	ADM History [illegible]	[illegible]	[illegible]		[illegible]	[illegible]					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 ($)					95				95		No Schedu
		1	Market Share		Primary	Market Share					95				95		No Schedule
Jul/07/2014	Mar/10/2014	1	Days		Primary	Cycle Time					95			96	95		No Schedul
Jun/26/2014	Jun/26/2014	1	Defects		Primary	Defects Per Unit (u)					95				95		No Schedu
		1	cost avoidance		Primary	Opportunity Cost ($)					95				95		No Schedu
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. In addition, you can select to display custom fields that are specific to a non-WBS activity, and display linked activities in the report output. The Activity number column displays the internal ID of the activity.

Filter Parameters

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

Output (Display Options)

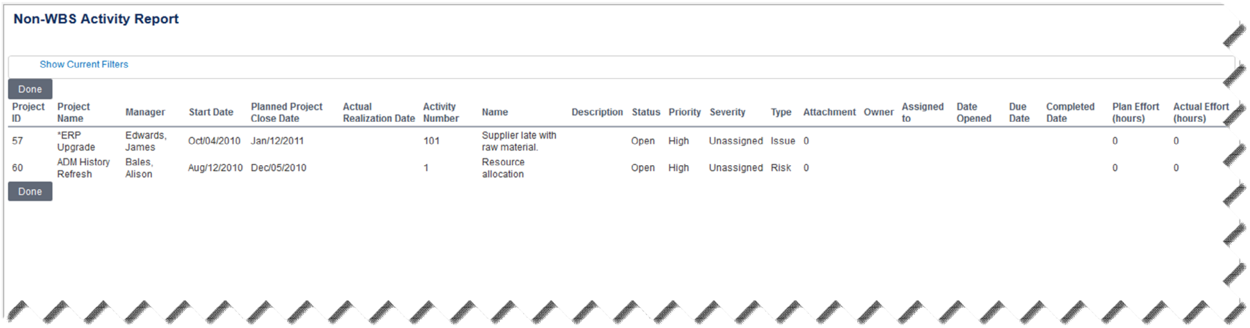
The available report formats are: CSV, HTML, and MS Excel. You can also select the maximum number of rows to show per report.

Output (Output Columns)

You can select the activity link columns to display and the activity custom fields to display in the output.

> **Note:** Only custom fields that are set to **Visible** by your administrator are displayed as output options.

Sample Report



Non-WBS Activity Report

Show Current Filters

Done

Project ID	Project Name	Manager	Start Date	Planned Project Close Date	Actual Realization Date	Activity Number	Name	Description	Status	Priority	Severity	Type	Attachment	Owner	Assigned to	Date Opened	Due Date	Completed Date	Plan Effort (hours)	Actual Effort (hours)
57	*ERP Upgrade	Edwards, James	Oct/04/2010	Jan/12/2011		101	Supplier late with raw material.		Open	High	Unassigned	Issue	0						0	0
60	ADM History Refresh	Bales, Alison	Aug/12/2010	Dec/05/2010		1	Resource allocation		Open	High	Unassigned	Risk	0						0	0

Done

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.

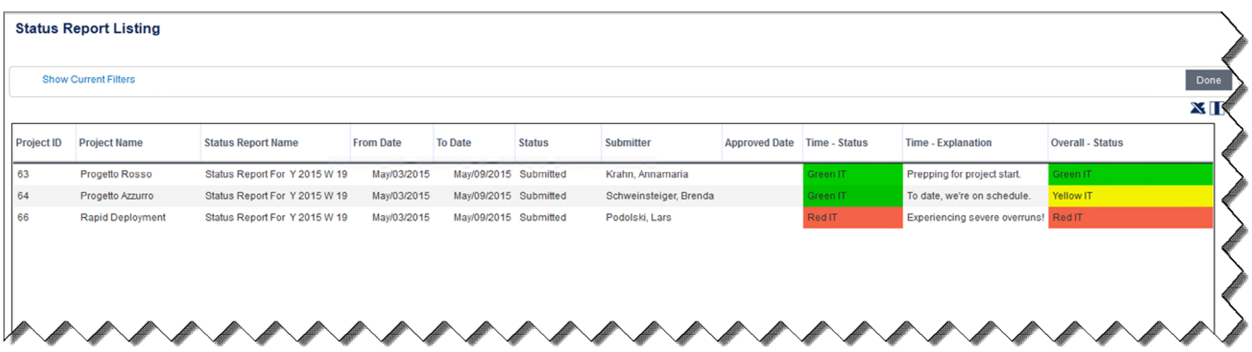
Filter Parameters

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.

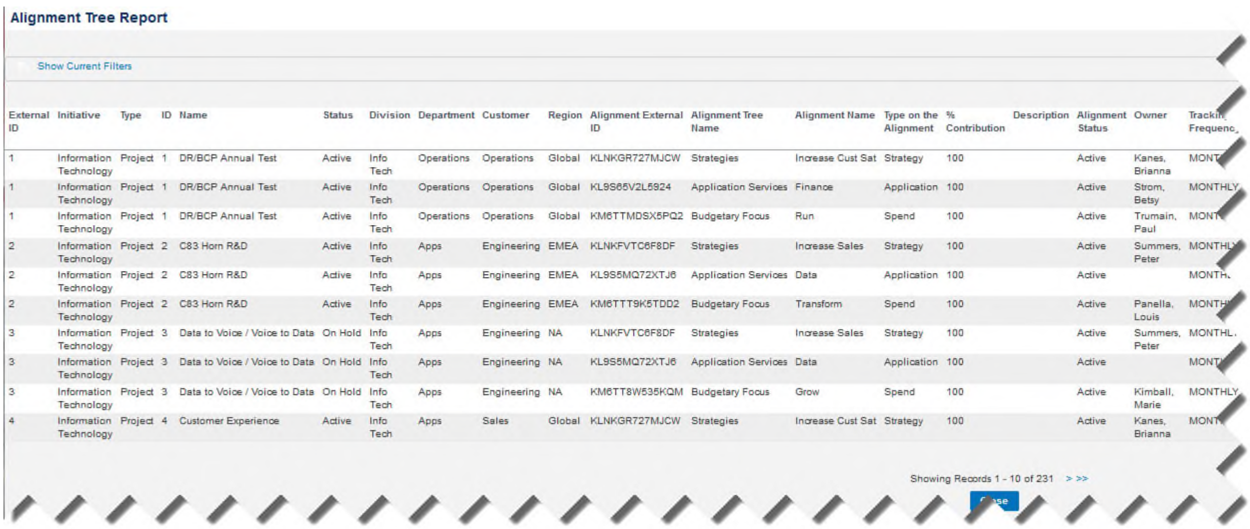
Filter Parameters

You can filter on module (Idea, Program, Project, and Proposal), initiative, alignment tree, alignment basics, alignment dates, 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, idea custom field, program program dates, program custom fields, and program organization hierarchy.

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	Trackin Frequenc
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	MONT
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	MONTHL
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 > >>

Pipeline Report

Use the Pipeline report to list fields that are mapped across ideas, proposals, and projects. You can also use this report to display common custom fields across entities.

Filter Parameters

You can filter on module, initiative, project basics, project dates, project organization hierarchy, project classification fields, project custom fields, proposal basics, proposal team, proposal organization hierarchy, proposal classification fields, proposal custom fields, idea basics, idea organization hierarchy, idea custom fields, program, and program organization hierarchy.

Output (Output Parameters)

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

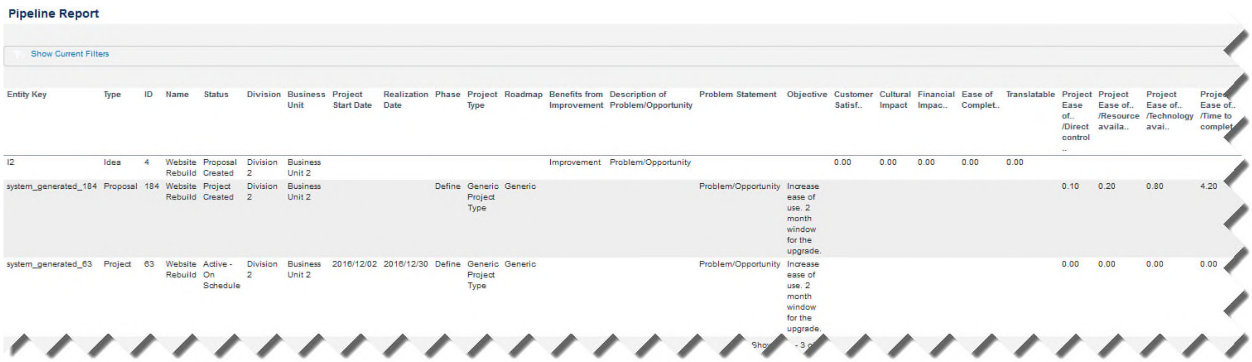
The output choices are CSV, HTML and MS Excel.

Output (Output Columns)

You can select project, proposal, idea, and roles custom fields to display in the output.

Note: One output column is used to display custom fields that are mapped across entities.

Sample Report



Pipeline Report

Show Current Filters

Entity Key	Type	ID	Name	Status	Division	Business Unit	Project Start Date	Realization Date	Phase	Project Type	Roadmap	Benefits from Improvement	Description of Problem/Opportunity	Problem Statement	Objective	Customer Satisf..	Cultural Impact	Financial Impac..	Ease of Complet..	Translatable	Project Ease of.. /Direct control ..	Project Ease of.. /Resource availa..	Project Ease of.. /Technology avai..	Proje Ease of.. /Time to complet
I2	Idea	4	Website Rebuild	Proposal Created	Division 2	Business Unit 2						Improvement	Problem/Opportunity			0.00	0.00	0.00	0.00	0.00				
system_generated_184	Proposal	184	Website Rebuild	Project Created	Division 2	Business Unit 2			Define	Generic Project Type	Generic			Problem/Opportunity	Increase ease of use. 2 month window for the upgrade.						0.10	0.20	0.80	4.20
system_generated_63	Project	63	Website Rebuild	Active - On Schedule	Division 2	Business Unit 2	2016/12/02	2016/12/30	Define	Generic Project Type	Generic			Problem/Opportunity	Increase ease of use. 2 month window for the upgrade.						0.00	0.00	0.00	0.00

Deleted Records Report

Use the Deleted Records report to view information on deleted entities. The following information is captured for deleted entities: Type, ID, Name, Additional Information, Deletion Date, Deleted By, Parent ID, Parent Type, and Initiative. You must have the **View Deleted Entity Report** access level permission to view this report.

The Login ID of deleted resources is displayed in the Additional Information column. The report also shows the initiative for applicable entities. For deleted Projects and Proposals, the system only displays entities that match the initiative of the logged in user.

Filter Parameters

You can select the entity, the deleted date (from), deleted time (from)deleted date (to), name ,ID, and deleted by.

Output (Output Parameters)

You can select the report format, rows per page, maximum number rows to display per report, and if the output should be compressed. You can also choose to include child entities in the output. This option is available only if the selected entity is not a child entity.

The output choices are CSV, HTML and MS Excel.

Output (Output Columns)

You can select the program custom fields to displays. You can also select if you want the report to show program organization hierarchy, program finances, program statements and notes, and project details.

Sample Report

Deleted Records Report

Show Current Filters

Type	ID	Name	Additional Information	Deletion Date	Deleted By	Parent ID	Parent Type
Activity	LSC4T67H9W4J3	Task Item two		Nov/02/2017 02:00:16 PM	Bowser, George	21	Project
Activity	LSC4TL3SGVL29	Post Close Task		Nov/02/2017 02:01:38 PM	Bowser, George	28	Project
LinkedProject	28	Project: *20XX SWIFT Mandate update	Linked to Project - 23	Nov/02/2017 02:02:36 PM	Bowser, George		

Showing 1 - 3 of 3

Close

Program Listing

Use the Program Listing report to view basic information on a program, view evaluation scores, and view the associated projects and proposals. You must have **View Program Listing Report** access level permission to view this report.

Filter Parameters

You can filter on program, program dates, program custom fields, program organization hierarchy, and project basics.

Output (Output Parameters)

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

The output choices are CSV, HTML and MS Excel.

Output (Output Columns)

You can select the program custom fields to displays. You can also select if you want the report to show program organization hierarchy, program finances, program statements and notes, and project details.

Sample Report

Program Listing Report

Show Current Filters

Program ID	Program Name	Description	Created By	Program Manager	Status	[Organization Level 1]	[Organization Level 2]	[Organization Level 3]	[Organization Level 4]	[Organization Level 5]	Date Created	Last Updated Date	Last Updated By	Savings or Revenue	Costs
1	First Level Group	First level impact projects	Configurator, System	Anderson, Dana	Active	Development	Design	General	Australia	[Organization 1 at Level 5]	Apr/27/2017	May/31/2017	Configurator, System	$300,000.00	$150,000.00
11	Available Program	Desc	Configurator, System	Anderson, Dana	Active						May/03/2017	Jun/08/2017	Configurator, System	$0.00	$0.00
13	Required Test	Desc	Configurator, System	Awender, Robert	Active						May/31/2017	May/31/2017	Configurator, System	$0.00	$0.00
14	Program 1	Desc	Configurator, System	Rodgers, Hank	Active	Development	Development	Group 1	Australia		Jun/01/2017	Jun/01/2017	Configurator, System	$0.00	$0.00
15	Program 2	Desc	Configurator, System	Anderson, Dana	Active	Strategy	Development	General	Australia	[Organization 2 at Level 5]	Jun/01/2017	Jun/01/2017	Configurator, System	$0.00	$0.00

Field Change History Report

Use the Field Change History report to view a list of field changes that were made to the Projects, Proposals, and Programs modules. You must have **View Program Listing Report** access level permission to view this report.

Filter Parameters

You can filter on initiative, entity, project basics, project dates, project organization hierarchy, project classification fields, project custom fields, proposal basics, proposal team, proposal dates, proposal organization hierarchy, proposal cl classification fields, proposal custom fields, program, program dates, program custom fields, and program organization hierarchy.

Output (Output Parameters)

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

The output choices are CSV, HTML and MS Excel.

Sample Report

Field Change History Report

Show Current Filters

Entity ID	Entity Name	Entity Type	Description	Field	From Value	To Value
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Oct/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Sep/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Aug/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Jul/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Jun/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, May/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Apr/01/2017	Savings or Revenue/[Savings Category 5]/[Line Item]	0	1000
1	Lighting Efficiency for Building 51	Proposal	Finance Data, Plan, Mar/01/2020	Savings or Revenue/[Savings Category 3]/[Line Item]	0	500
1	Lighting Efficiency for	Proposal	Finance Data, Plan,	Savings or	0	500

Linked Projects

Use the Linked Projects report to view all linked projects. You can select to view projects that are linked to other projects or view the projects and proposals that are linked from other projects. You must have **View Program Listing Report** access level permission to view this report.

Filter Parameters

You can filter on initiative, project basics, project dates, project organization hierarchy, project custom fields, and classification fields.

Output (Output Parameters)

You can select the report format, rows per page to display, primary column to sort by, primary sort direction, maximum number rows to display per report, and if the output should be compressed. You can also select the project output format (Linked From or Linked To). If you select Linked From, the system displays the proposals and projects that are linked from a project. If you select Linked To, the system displays projects that are linked to a project.

The output choices are CSV, HTML and MS Excel.

Sample Report

Linked Project Report

Show Current Filters

Project ID	Project Name	Linked To Project ID	Linked To Project Name	Link Type	Linked To Project Manager	Comments
7	Customer Return & Restocking update	29	Services levels improvement update	Peer	Bowser, George	Added 5/30/17
7	Customer Return & Restocking update	53	NuGreen Bio Bottle update	Peer	Bowser, George	Added 5/30/17
11	*Customer Financing Approval Process update	61	Assessment Project	Peer	Jones, Karen	After Reassign
47	*CP Upgrade update	22	*Global Capital Markets DF Reporting update	Child	Bowser, George	
47	*CP Upgrade update	52	*Secure Credit Card update	Child	Rodgers, Hank	
47	*CP Upgrade update	49	*Regulatory Q Repeal (DF Impact) update	Child	Bowser, George	
57	*20XX SWIFT Mandate update	11	*Customer Financing Approval Process update	Parent	Rodgers, Hank	
57	*20XX SWIFT Mandate update	44	*Cellulose Acetate Microflakes update	Parent	Rodgers, Hank	
57	*20XX SWIFT Mandate update	47	*CP Upgrade update	Parent	Frankel, Karen	

Showing 1 - 9 of 9

Close

Linked Project Report

Show Current Filters

Project ID	Project Name	Linked From ID	Linked From Name	Project / Proposal	Link Type	Linked From Project Manager	Comments
29	Services levels improvement update	7	Customer Return & Restocking update	Project	Peer	Jones, Karen	Added 5/30/17
53	NuGreen Bio Bottle update	7	Customer Return & Restocking update	Project	Peer	Jones, Karen	Added 5/30/17
61	Assessment Project	11	*Customer Financing Approval Process update	Project	Peer	Rodgers, Hank	After Reassign
52	*Secure Credit Card update	47	*CP Upgrade update	Project	Child	Frankel, Karen	
49	*Regulatory Q Repeal (DF Impact) update	47	*CP Upgrade update	Project	Child	Frankel, Karen	
22	*Global Capital Markets DF Reporting update	47	*CP Upgrade update	Project	Child	Frankel, Karen	
11	*Customer Financing Approval Process update	57	*20XX SWIFT Mandate update	Project	Parent	Bowser, George	
44	*Cellulose Acetate Microflakes update	57	*20XX SWIFT Mandate update	Project	Parent	Bowser, George	
47	*CP Upgrade update	57	*20XX SWIFT Mandate update	Project	Parent	Bowser, George	
8	*ERP Upgrade update	14	Customer Experience	Proposal	Peer		
47	*CP Upgrade update	14	Customer Experience	Proposal	Peer		
11	*Customer Financing Approval Process update	14	Customer Experience	Proposal	Peer		

Proposal Team Listing

Based on your filters, this report displays a list of proposal team members with their approval information, or the initial project team members with their allocation information. From the Output tab, you can also choose to display detail efforts. If detail efforts were added to a proposal, this report displays one row for each effort entry for the resource instead of the total effort for the resource.

Some of the columns that can display on your report include: proposal ID, proposal name, initiative, role, member, login ID (column displays only if you have the permission *Allow user to view/search login ID*), team type (specifies Charter Team or Initial Project Team), team member ID, approval type (displayed for proposal team members), approval status (displayed for proposal team members), proposal status, proposal last updated date, updated by, project ID, and external ID.

When displaying a report of initial project team members, the following additional columns are displayed: allocation ID, allocation type, allocation status (displays N/A if approval is not needed), allocation start date, allocation end date, percent allocation (shows the default allocation percent if no allocation percent is present), allocation efforts (shows detail efforts or the total effort), planned start date, and planned completion date.

> **Notes:** The Initial Project Team option displays only if the Initial Project Team is enabled.

Filter Parameters

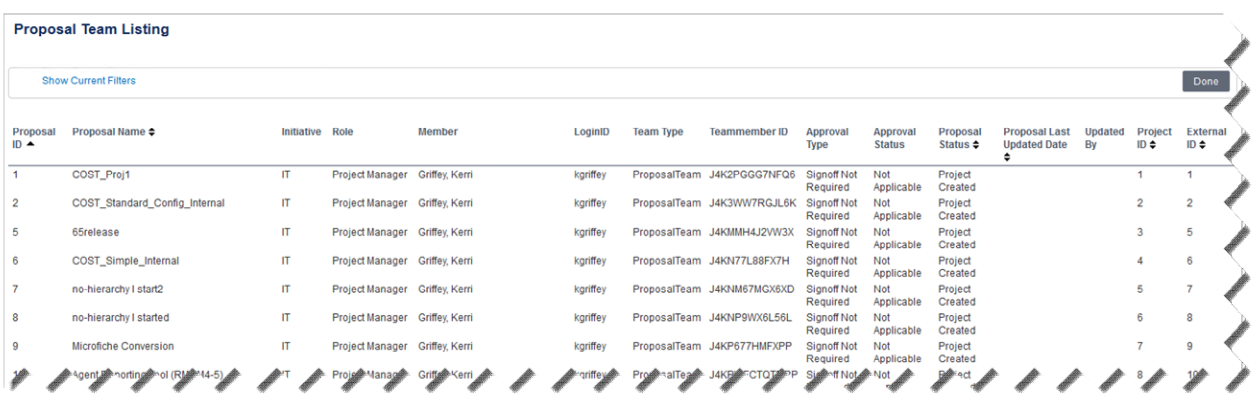
You can filter on initiative, proposal basics, proposal dates, classification fields, organization hierarchy, finances, proposal custom fields, program, and program organization hierarchy.

Output Parameters

You can select the report format, primary column to sort by, sort direction, number rows to display per page, maximum number of rows to display per report, display report for proposal team or initial project team, and to display initial project team details efforts.

The output choices are CSV and HTML.

Sample Report (Proposal Team)



Proposal Team Listing

Show Current Filters

Done

Proposal ID	Proposal Name	Initiative	Role	Member	LoginID	Team Type	Teammember ID	Approval Type	Approval Status	Proposal Status	Proposal Last Updated Date	Updated By	Project ID	External ID
1	COST_Proj1	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4K2PGGG7NFQ6	Signoff Not Required	Not Applicable	Project Created			1	1
2	COST_Standard_Config_Internal	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4K3WW7RGJL6K	Signoff Not Required	Not Applicable	Project Created			2	2
5	65release	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4KMMH4J2VW3X	Signoff Not Required	Not Applicable	Project Created			3	5
6	COST_Simple_Internal	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4KN77L88FX7H	Signoff Not Required	Not Applicable	Project Created			4	6
7	no-hierarchy I start2	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4KNM67MGX6XD	Signoff Not Required	Not Applicable	Project Created			5	7
8	no-hierarchy I started	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4KNP9WX6L56L	Signoff Not Required	Not Applicable	Project Created			6	8
9	Microfiche Conversion	IT	Project Manager	Griffey, Kerri	kgriffey	ProposalTeam	J4KP677HMFXPP	Signoff Not Required	Not Applicable	Project Created			7	9
[illegible]	Agent [illegible]orting[illegible]ol (R[illegible]4-5)	[illegible]T	Proj[illegible] Manag[illegible]	Griff[illegible] Kerri	[illegible]griffey	Pro[illegible]alTea[illegible]	J4K[illegible]CTQT[illegible]P	Si[illegible]ff Not	Not	[illegible]ect			8	1[illegible]

Sample Report (Initial Project Team)

Proposal Team Listing

Show Current Filters

Proposal ID	Proposal Name	Initiative	Role	Member	LoginID	Team Type	Teammember ID	Allocation ID	Allocation Type	Allocation Status	Allocation Start Date	Allocation End Date	Percent Allocation	Allocation Efforts	Planned Start Date	Planned Completion Date	Proposal Status	Proposal Last Updated Date	Updated By
1	COST_Proj1	IT	IT Resource	Kimball, Marie	mkimball	Initial Project Team	J4K2PGGJCFC9R	J4K2PGGWR36DC	Date Range	Open			100			Nov/18/2010	Project Created		
1	COST_Proj1	IT	Network Admin	Franklin, Keith	kfranklin	Initial Project Team	J4K2PGGJ62FQR	J4K2PGGQ7LTRF	Entire Project	NA			100			Nov/18/2010	Project Created		
1	COST_Proj1	IT	DBA	YuLin, Amy	ayulin	Initial Project Team	J4K2PGGHVGLW8	J4K2PGGNWR8XW	Date Range	Open			100			Nov/18/2010	Project Created		
1	COST_Proj1	IT	Project Manager	Griffey, Kerri	kgriffey	Initial Project Team	J4K2PGGHMTS4P	J4K2PGGMD743C	Date Range	Open			100			Nov/18/2010	Project Created		
1	COST_Proj1	IT	IT Role With No Access			Initial Project Team	J4K2PGGJXVSHT			Open						Nov/18/2010	Project Created		
1	COST_Proj1	IT	IT Role With All Access			Initial Project Team	J4K2PGGJSJVWT			Open						Nov/18/2010	Project Created		
1	COST_Proj1	IT	Role Approval Required			Initial Project Team	J4K2PGGJKX55C			Open						Nov/18/2010	Project Created		
2	COST_Standard_Config_Internal	IT	Project Manager			Initial Project Team	J4K3WW7SPD6X2			Open						Nov/18/2010	Project Created		
2	COST_Standard_Config_Internal	IT	IT Resource			Initial Project Team	J4K3WW7TPMM72			Open						Nov/18/2010	Project Created		
2	COST_Standard_Config_Internal	IT	IT Role With All Access			Initial Project Team	J4K3WW7TK8PN2			Open						Nov/18/2010	Project Created		
2	COST_Standard_Config_Internal	IT	Role Approval Required			Initial Project Team	J4K3WW7TDTS52			Open						Nov/18/2010	Project Created		
2	COST_Standard_Config_Internal	IT	IT Role With No Access			Initial Project Team	J4K3WW7T7HVL2			Open						Nov/18/2010	Project Created		

Program Eval Report

Use the Program Eval report to view detailed evaluation information on a program. You must have **View Program Eval Report** access level permission to view this report.

Filter Parameters

You can filter on program, program dates, program custom fields, program organization hierarchy, project basics, and proposal basics.

Output Parameters

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

The output choices are CSV, HTML and MS Excel.

Sample Report

Program Evaluation Report

Show Current Filters

			Production								
			Feasibility (weight = 50%)					Quality (weight = 50%)			
			Resource Availa..	Socio Economic ..	Time to Market	Risk Assessment..	Total Score	Reliability	Conformance	Serviceability	Total Score
Program ID	Program Name	Weights -->	40%	30%	10%	20%		10%	40%	50%	
3	Modernize existing infrastructure		6	8	5	2	5.7	3	4	5	4.4

			Development			
			Ease of complet.. (weight = 100%)			
			Resource Availa..	Change Impact	Quality Conform..	Total Score
Program ID	Program Name	Weights -->	20%	50%	30%	
4	Improve Productivity		5	8	5	6.5

Close

Program Non-WBS Activity Report

Use the Program Non-WBS Activity report to display a detailed list of all non-WBS activities, issues, and risks configured for Programs.The Activity number column displays the internal ID of the activity.

Filter Parameters

You can filter on program, program dates, project organization hierarchy, program custom fields, activity.

Output (Display Options)

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

Output (Output Columns)

You can select the activity link columns to display and the activity custom fields to display in the output.

Note: Only custom fields that are set to **Visible** by your administrator are displayed as output options.

Sample Report

Program Non-WBS Activity Report

Show Current Filters

Done

Program ID	Program Name	Program Manager	Activity Number	Activity ID	Name	Description	Status	Priority	Severity	Type	Attachment	Owner	Date Opened	Due Date	Completed Date	Risk-Decision Date	Risk-Risk Type
3	Modernize existing infrastructure	Griffey, Kerri	1	M2TWC45GHR38F	Skilled resource shortage	Skilled resource shortage	Open	High	Medium	Issue	0	Darsch, Nancy					
3	Modernize existing infrastructure	Griffey, Kerri	1	M2TW9NPK2RV8P	Change in the environmental norms	There is a change expected in the environmental policy where the current projects part of the program are to be executed. This will have an impact on the schedule as well as costing	Open	High	High	Risk	0	Arnold, Trevor				Jul/06/2018	Watching for Trigger Eve

Done

Project Reports (Summary Reports)

In This Section

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	0.00
Marketing	[illegible]	12	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

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 Listing By Role

Show Current Filters

Project Manager Project Metrics

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

Project Final Report

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

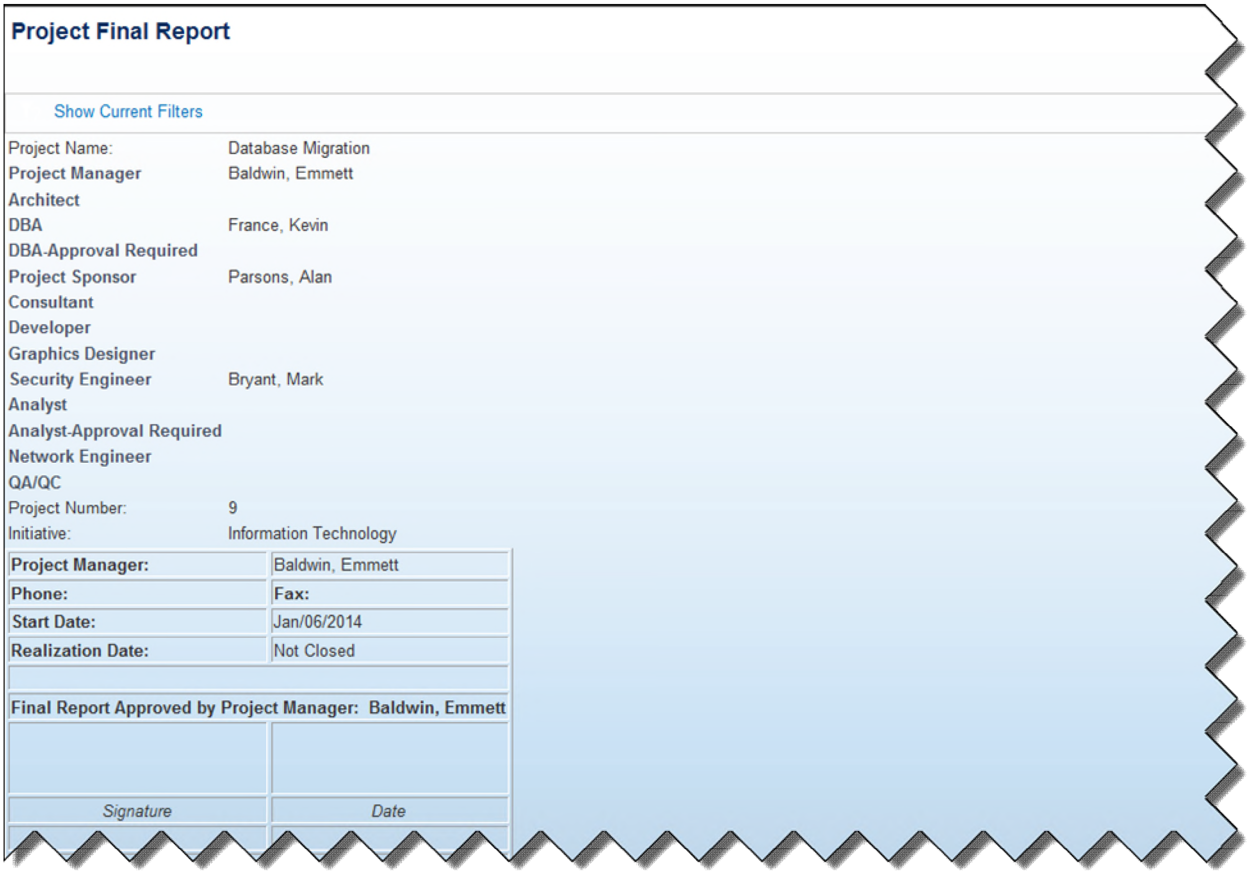
Filter Parameters

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

Output Parameters

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

Sample Report



Project Final Report

Show Current Filters

Project Name:	Database Migration
Project Manager	Baldwin, Emmett
Architect	
DBA	France, Kevin
DBA-Approval Required	
Project Sponsor	Parsons, Alan
Consultant	
Developer	
Graphics Designer	
Security Engineer	Bryant, Mark
Analyst	
Analyst-Approval Required	
Network Engineer	
QA/QC	
Project Number:	9
Initiative:	Information Technology

Project Manager:	Baldwin, Emmett
Phone:	**Fax:**
Start Date:	Jan/06/2014
Realization Date:	Not Closed
Final Report Approved by Project Manager: Baldwin, Emmett	
Signature	*Date*

Project Review Report

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

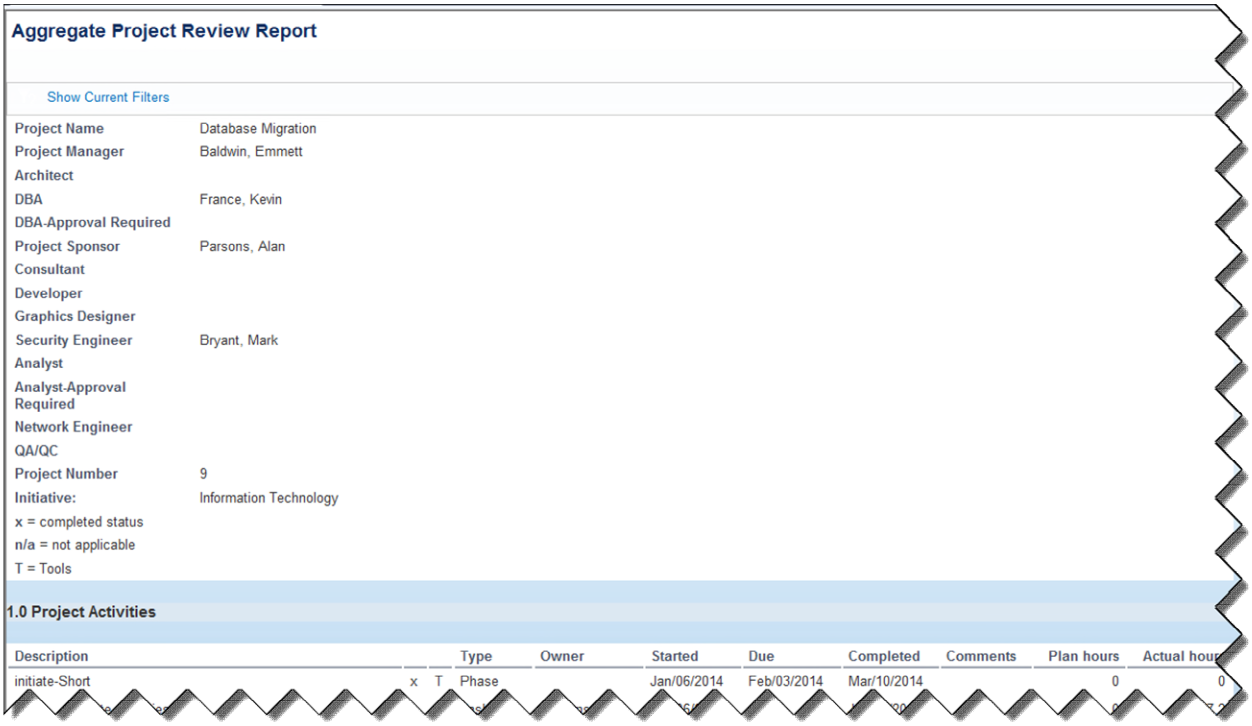
Filter Parameters

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

Output Parameters

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

Sample Report



Aggregate Project Review Report

Show Current Filters

Project Name	Database Migration
Project Manager	Baldwin, Emmett
Architect	
DBA	France, Kevin
DBA-Approval Required	
Project Sponsor	Parsons, Alan
Consultant	
Developer	
Graphics Designer	
Security Engineer	Bryant, Mark
Analyst	
Analyst-Approval Required	
Network Engineer	
QA/QC	
Project Number	9
Initiative:	Information Technology
x = completed status	
n/a = not applicable	
T = Tools	

1.0 Project Activities

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

Project Control Report

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

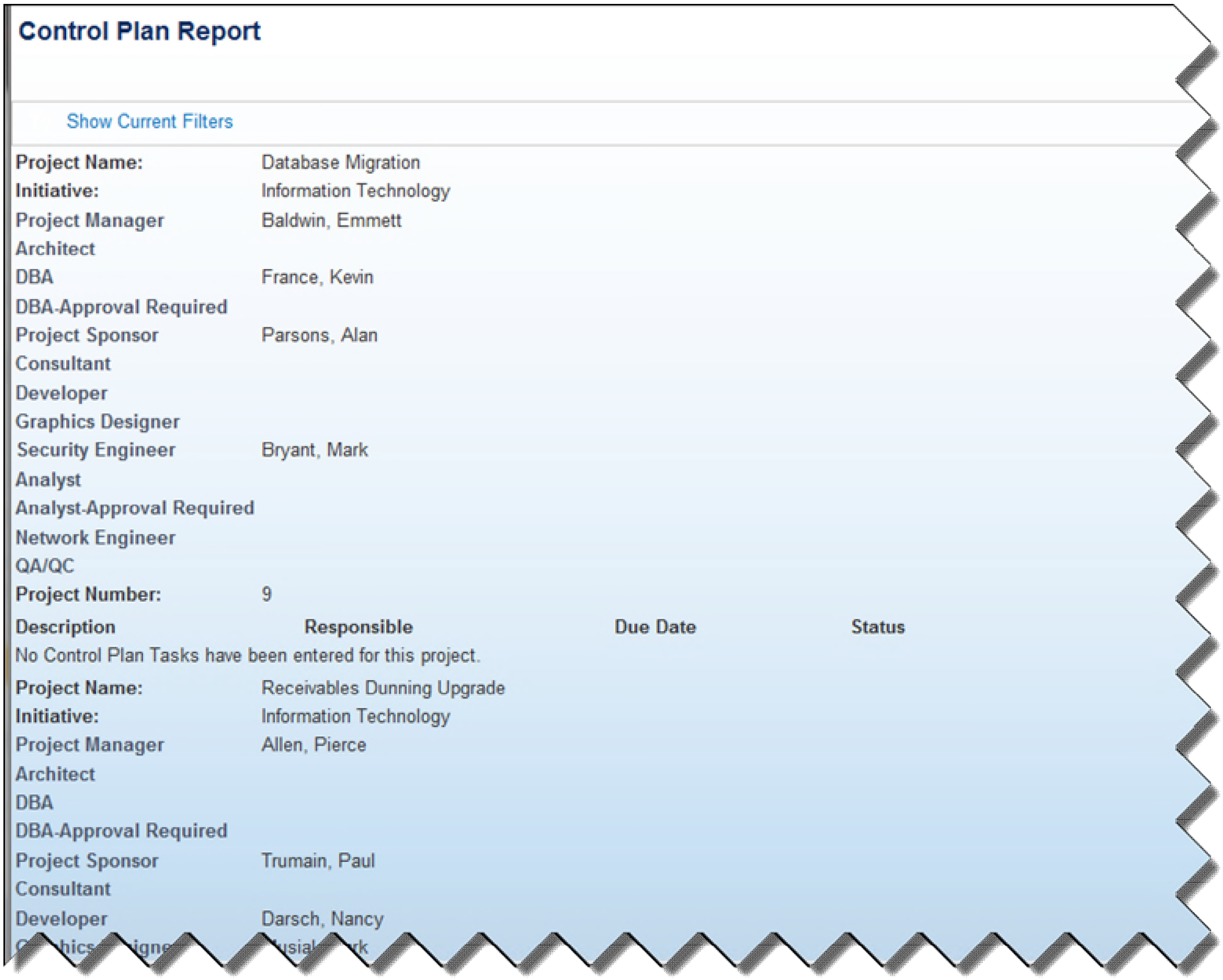
Filter Parameters

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

Output Parameters

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

Sample Report



Control Plan Report

Show Current Filters

Project Name:	Database Migration
Initiative:	Information Technology
Project Manager	Baldwin, Emmett
Architect	
DBA	France, Kevin
DBA-Approval Required	
Project Sponsor	Parsons, Alan
Consultant	
Developer	
Graphics Designer	
Security Engineer	Bryant, Mark
Analyst	
Analyst-Approval Required	
Network Engineer	
QA/QC	
Project Number:	9

Description	Responsible	Due Date	Status
No Control Plan Tasks have been entered for this project.			

Project Name:	Receivables Dunning Upgrade
Initiative:	Information Technology
Project Manager	Allen, Pierce
Architect	
DBA	
DBA-Approval Required	
Project Sponsor	Trumain, Paul
Consultant	
Developer	Darsch, Nancy

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. If the report format is CSV, the output shows one row per note, and returns information for projects that contain notes.

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						Feasibility					
			Repeatable	Financial	Organizational	Product	Process	Total Score	Time	Technology	Organizational	Capability	Financial	Total Score
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 initiative, project basics, project dates, organization hierarchy, project custom fields, alignment tree, alignment dates.

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/21/2015	Aug/26/2014		Info Tech	Apps	Sales	Global	Strategies	Information Technology	Increase Cust Sat			100

Showing Records 1 - 10 of 129 > >>

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 and HTML.

Sample Report

Resource Profile Reports: Professional Certification

Show Current Filters

Adams, Don																		
Access Profile			Manager			Company Name			Business Phone			Cell Phone			Fax			
IT PM			Allen, Vanessa						408-263-4556			408-786-3211						
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training	Assignment Date	Full Time
Certification-1	PMP	PMP		Information Technology,Financial Services,Continuous Improvement,New Product Development	Mar/01/2012				Jan/01/2012			Info Tech				0		
Allen, Vanessa																		
Access Profile			Manager			Company Name			Business Phone			Cell Phone			Fax			
IT Management			Adams, Don						+1-206-555-1212									
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training	Assignment Date	Full Time
Certification-1	PMP			Information Technology,Financial Services,Continuous Improvement,New Product Development		60						Info Tech				0		
Boozer, Dan																		
Access Profile			Manager			Company Name			Business Phone			Cell Phone			Fax			
FS PM			Smith, John															
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training	Assignment Date	Full Time
Certification-1	PMP			Information Technology,Financial Services,Continuous Improvement,New Product Development		1	Certified	Yes				Finance	M&A			0		
Ives, Victoria																		
Access Profile			Manager			Company Name			Business Phone			Cell Phone			Fax			
CI Management			Allen, Vanessa															
Certification ID	Certification Type	Certification Description	Certification Wave	Initiative	Training Completion Date	No of Prof Units	Status	Current Certification	Training Start Date	Certification Due Date	Actual Certification Date	Division	Department	Customer	Region	No of Months after Training	Assignment Date	Full Time
Certification-1	Master Black Belt Certified			Information Technology,Financial Services,Continuous Improvement,New Product Development			Certified	Yes			Jan/15/2012	Finance	Cont Improvement		Global	0		

Resource Expertise/Skills

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

Filter Parameters

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

Output Parameters

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

The output choices are CSV, PDF and HTML.

Sample Report

Resource Expertise/Skills Report

Show Current Filters

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

Resource Assets

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

Filter Parameters

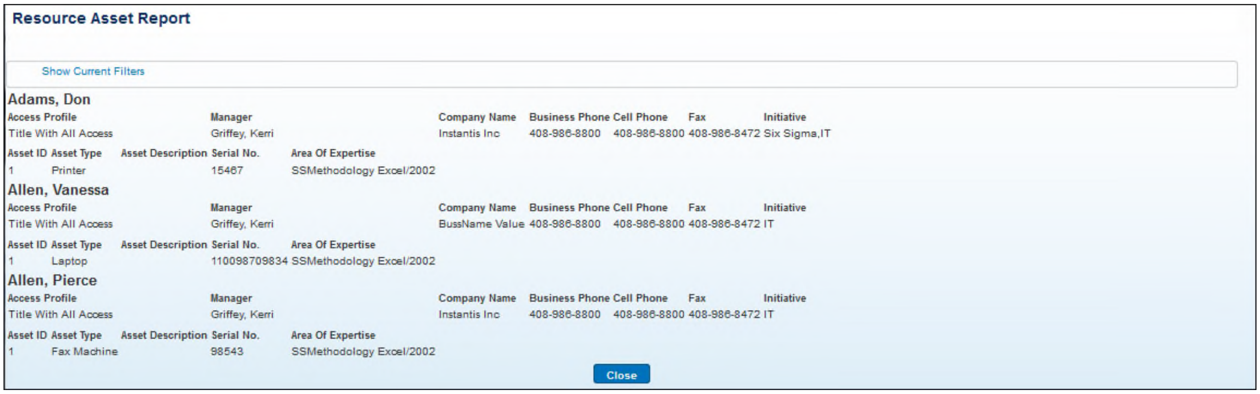
You can filter on pull down status, initiative, resource basics, and organization hierarchy.

Output Parameters

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

The output choices are CSV, PDF and HTML.

Sample Report


Resource Asset Report

Show Current Filters

Adams, Don

Access Profile	Manager	Company Name	Business Phone	Cell Phone	Fax	Initiative
Title With All Access	Griffey, Kerri	Instantis Inc	408-986-8800	408-986-8800	408-986-8472	Six Sigma,IT

Asset ID	Asset Type	Asset Description	Serial No.	Area Of Expertise
1	Printer		15467	SSMethodology Excel/2002

Allen, Vanessa

Access Profile	Manager	Company Name	Business Phone	Cell Phone	Fax	Initiative
Title With All Access	Griffey, Kerri	BussName Value	408-986-8800	408-986-8800	408-986-8472	IT

Asset ID	Asset Type	Asset Description	Serial No.	Area Of Expertise
1	Laptop		110098709834	SSMethodology Excel/2002

Allen, Pierce

Access Profile	Manager	Company Name	Business Phone	Cell Phone	Fax	Initiative
Title With All Access	Griffey, Kerri	Instantis Inc	408-986-8800	408-986-8800	408-986-8472	IT

Asset ID	Asset Type	Asset Description	Serial No.	Area Of Expertise
1	Fax Machine		98543	SSMethodology Excel/2002

Close

Heat Map by Resource

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

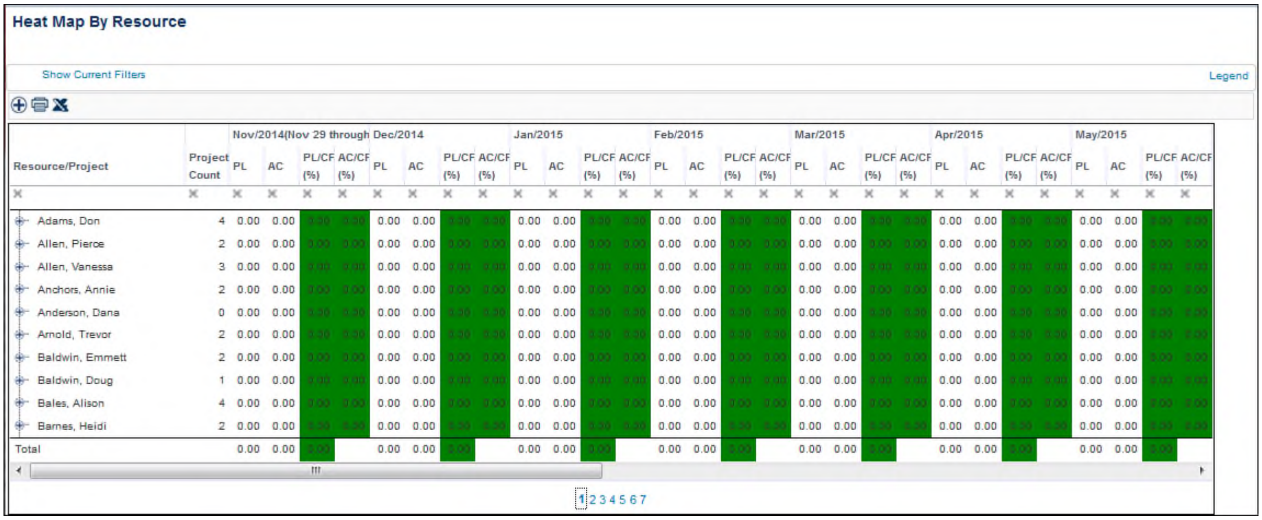
Output Parameters

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 Resource

Show Current Filters | Legend

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

1 2 3 4 5 6 7

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

Show Current Filters Legend

		Dec/2014(Dec 12 through D				Jan/2015				Feb/2015				Mar/2015				Apr/2015		
Role/Resource/Project	Project Count	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/CP (%)	AC/CP (%)	PL	AC	PL/ (%)
×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×	×
Consultant	9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Project Manager	27	8.00	43.83	0.55	3.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
DBA	8	16.00	43.83	2.04	5.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Security Engineer	8	8.00	43.83	1.79	9.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Project Sponsor	24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Architect	11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Release Manager	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Team Member	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
QA/QC	9	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Analyst	12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
Total		32.00				0.00				0.00				0.00				0.00		

1 2 3

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

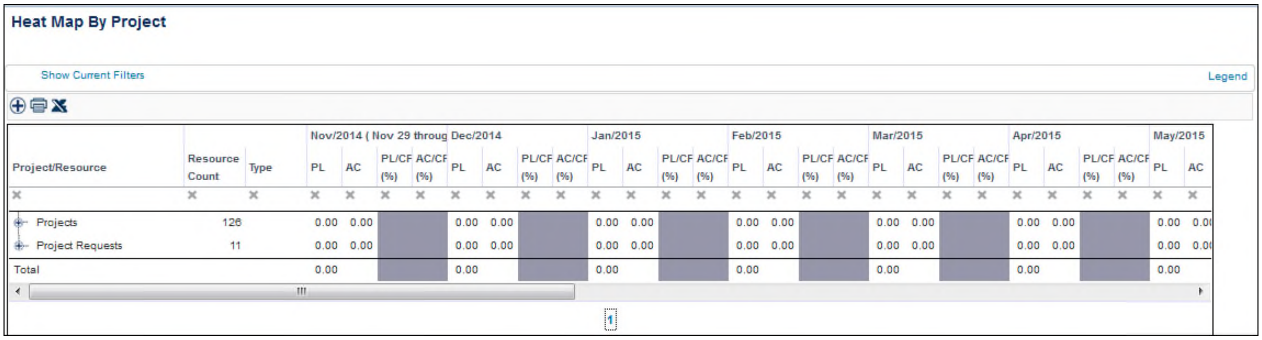
You can select the following filters:

- 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


Heat Map By Project

Show Current Filters Legend

Project/Resource	Resource Count	Type	Nov/2014 (Nov 29 throug PL	AC	PL/CF (%)	AC/CF (%)	Dec/2014 PL	AC	PL/CF (%)	AC/CF (%)	Jan/2015 PL	AC	PL/CF (%)	AC/CF (%)
Projects	126		0.00	0.00			0.00	0.00			0.00	0.00		
Project Requests	11		0.00	0.00			0.00	0.00			0.00	0.00		
Total			0.00				0.00				0.00			

Project/Resource	Feb/2015 PL	AC	PL/CF (%)	AC/CF (%)	Mar/2015 PL	AC	PL/CF (%)	AC/CF (%)	Apr/2015 PL	AC	PL/CF (%)	AC/CF (%)	May/2015 PL	AC
Projects	0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.0
Project Requests	0.00	0.00			0.00	0.00			0.00	0.00			0.00	0.0
Total	0.00				0.00				0.00				0.00	

1

Resource Utilization Chart

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

Filter Parameters

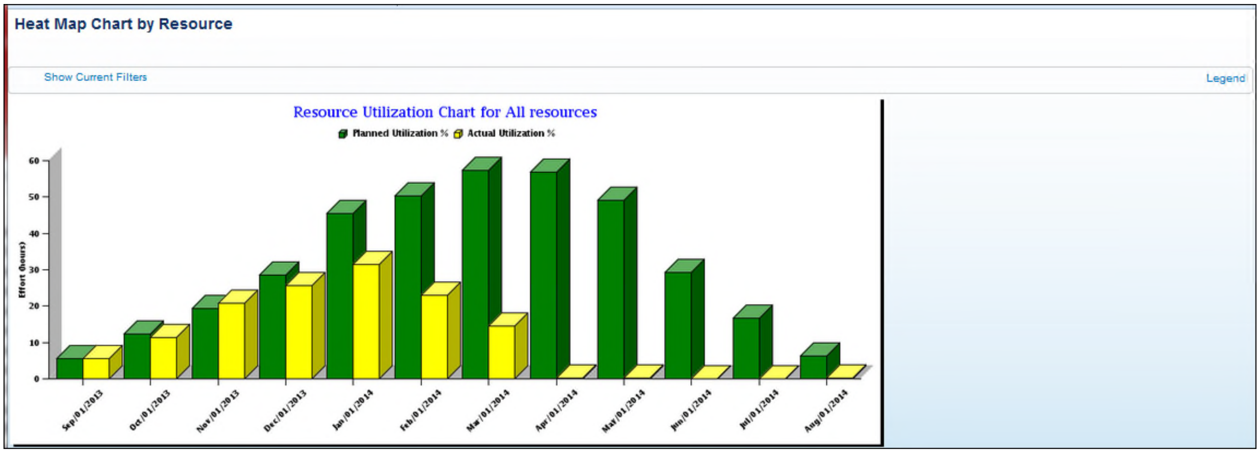
You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project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

Output Parameters

You can select the following filters:

- Display Filters: report format, maximum rows per report, compress output, and display resource level chart. The report format is HTML.
- Chart Filters: display 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

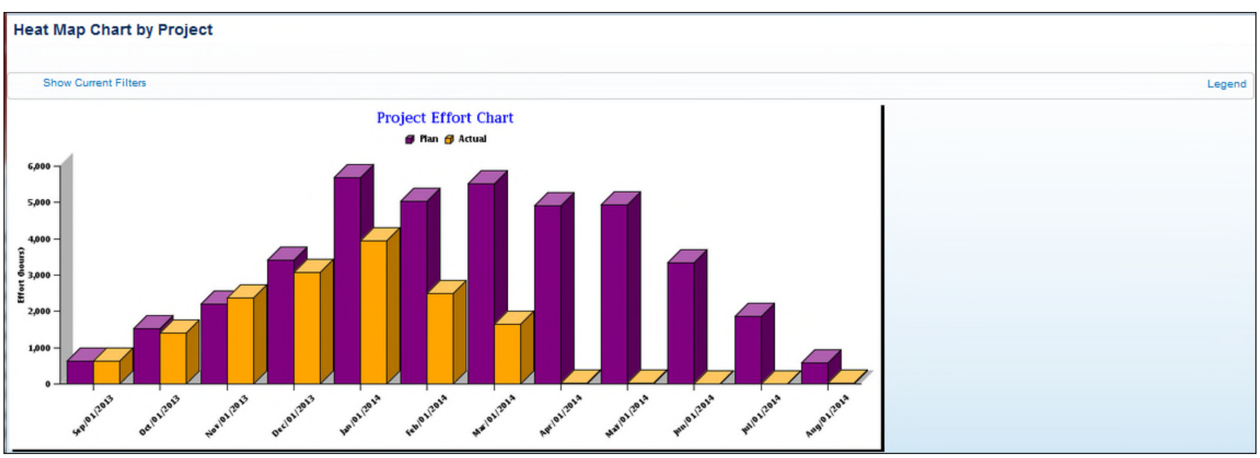
You can filter on pull down status, initiative, reporting date range, resource basics, resource filterable custom fields, resource organization hierarchy, project basics, project dates, project organization hierarchy, project finances, program, project custom fields, project classification fields, project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

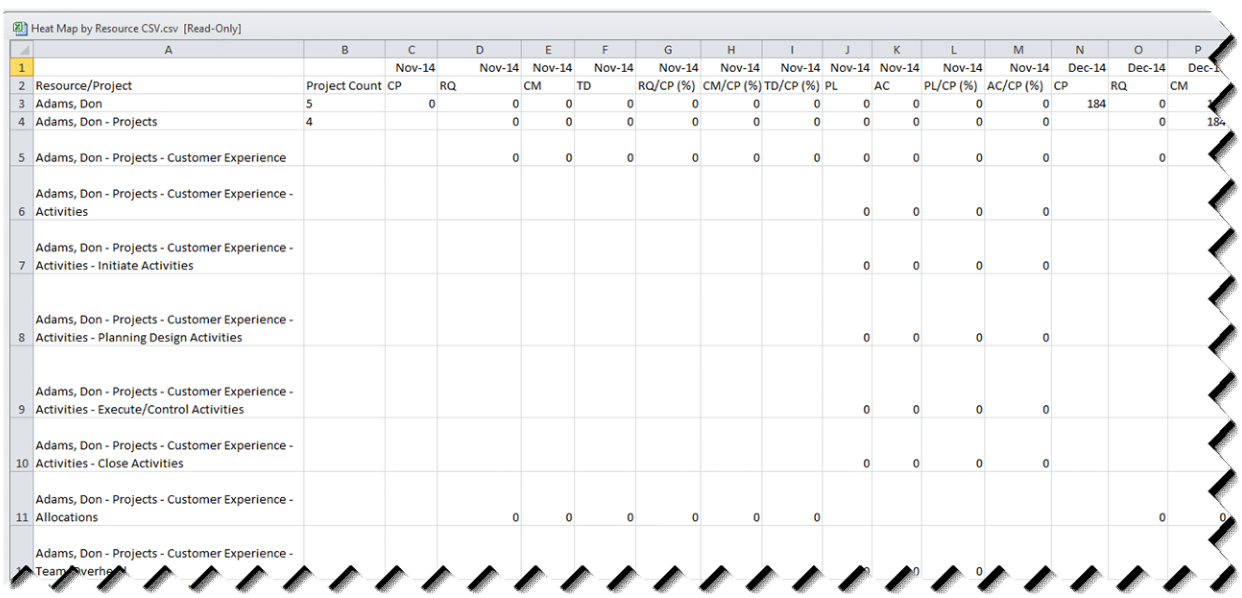
Output Parameters

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



Heat Map by Resource CSV.csv [Read-Only]

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

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

Resource Allocation Report

Show Current Filters

Project ID	Project Name	Project Role	Name	Status	Approval Role ?	Duration	Percentage/Effort	Pending/Unapproved Requested Effort For Resources From	Pending/Unapproved Requested Effort For Resources 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 %	Pending/Unapproved Requested Effort F[illegible] Resources
4	Receivables Dunning Upgrade	Network Admin	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
7	Microfiche Conversion	Network Admin	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
8	Agent Reporting Tool (RMMM4-5)	Network Admin	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
9	Oracle 12i upgrade for Marketing	Network Admin	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
18	New customer support portal with Force.com	Team Member	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
19	Analystics for commercial banking with BO	Team Member	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
63	Matching Division Test	Team Member	Don Adams	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
64	Allocation Validation	Project Manager	Don Adams	Allocated	Yes	Partial	Effort			May/08/2015	May/28/2015					0
63	Matching Division Test	Finance Rep	TBD	Allocated	No	Entire	Percent	Entire	Entire	Entire	Entire			0	100	0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Entire			0	[illegible]	[illegible]

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 O	Bailey, Steve	0	0	[illegible]	0	0	[illegible]	0	0	[illegible]

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 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 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. This report include numbers only from active projects and not completed or closed projects.

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 Weekly Status Report

Show Current Filters

Week of	Submitter	Project Number	Project Start Date	Reporting Category	Status	Approver	Approval/Rejection Date	Total Hours	Standard Hours	Standard Rate USD	Overtime Hours	Overtime Rate USD
Jun/14/2015 - Jun/20/2015												
	Allen, Vanessa	17	Aug/13/2009	C83 Horn R&D (RMMM3) Test Fin Lock	Submitted		-	40	40	$10.00	0	$10.00
	Allen, Vanessa	13	Aug/12/2009	Instantis EnterpriseTrack deployment for IT PMO	Approved		-	0	0	$10.00	0	$10.00
	Allen, Vanessa		-	Non-Project Time	Approved		-	0	0	$10.00	0	$10.00
	Allen, Vanessa		-	Non-Working Time	Approved		-	0	0	$10.00	0	$10.00
	Total							40	40		0	
	Adams, Don		-	Non-Working Time	Submitted		-	40	40	$0.00	0	$0.00
	Adams, Don	8	Aug/11/2009	Agent Reporting Tool (RMMM4-5)	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don	7	Aug/11/2009	Microfiche Conversion	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don	9	Aug/11/2009	Oracle 12i upgrade for Marketing	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don	4	Aug/11/2009	Receivables Dunning Upgrade	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don		-	Non-Project Time	Approved		-	0	0	$10.00	0	$10.00
	Total							40	40		0	
Jun/07/2015 - Jun/13/2015												
	Adams, Don		-	Non-Working Time	Submitted		-	32	32	$0.00	0	$0.00
	Adams, Don	8	Aug/11/2009	Agent Reporting Tool (RMMM4-5)	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don	7	Aug/11/2009	Microfiche Conversion	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don	9	Aug/11/2009	Oracle 12i upgrade for Marketing	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don	4	Aug/11/2009	Receivables Dunning Upgrade	Approved		-	0	0	$10.00	0	$10.00
	Adams, Don		-	Non-Project Time	Approved		-	0	0	$10.00	0	$10.00
	Total							32	32		0	

Close

Timesheet Detail Report

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

Notes:

- The Total Plan Effort column in this report is an information only column and the value will be the whole plan effort at activity level. This value may be repeated when the report is run to show the breakdown at day level, in such cases care should be taken not to double count the plan effort.
- The cost data is shown only for users that have the required permissions to view cost information.
- The resource rates are picked for the rate at assignment level. For non-project time and non-working time the standard rate at the resource level is used.
- If the 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

Timesheet_Detail_Report.xlsx

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

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