

ORACLE®

Instantis

EnterpriseTrack

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Contents

Navigating Within EnterpriseTrack	13
Module Level Menus	14
View Settings and Persistence	15
About Consent Notices	16
Viewing Your Personally Identifiable Information in EnterpriseTrack	16
Viewing Your Privacy Policy	16
Common Features	17
Working with Global Search	17
Using Toolbars	18
Sorting Data	19
Using Filters	19
Advanced Search and Saved Searches	20
Using the Calendar	21
Personalizing the Listing Pages	21
Attaching Document Files	22
Viewing Field History	23
Using Fractional Duration and Effort	24
Required Fields	25
Logging Out	25
My Work	25
Getting "My Work" Done	25
My Dashboards	27
Working with Dashboards	27
Viewing Dashboards	27
Mouse-Over	28
Drill-Down	28
Reading the Executive Dashboard	28
Reading the Project Dashboard	29
Managing Dashboards	29
Available Dashboard Components	30
Proposals (Charters)	30
Projects (General)	31
Projects (Count)	32
Project (Cycle Time)	35
Projects (Finances)	38
Projects (Metrics)	42
Resource	43

My Messages	45
Working with My Messages	45
My Preferences	46
Password History and Expiry	46
Changing Your Password	46
Viewing and Editing User Profiles	47
Export Personal Details	47
Changing Preferences	47
Viewing Certifications	48
Viewing User Permissions	48
Working with your Calendar	48
My Delegations	49
Viewing your Assigned Delegations	49
Adding a New Delegation	50
Managing your Delegations	50
Editing your Delegations	50
Deleting your Delegations	50
Ideas	51
Working with Ideas	51
Creating an Idea	52
Editing an Idea	53
Creating a Proposal from an Idea	54
Searching for Ideas	54
Using Ideas List Filter	54
Assigning an Owner for an Idea	54
Re-opening an Idea	55
Rejecting an Idea	55
Charters/Proposals	55
Working with Charters/Proposals	56
Searching for Proposals	57
Creating a Proposal for a Project	57
Working with the Statement Generator Wizard	60
Editing a Proposal	61
Associating a Proposal to a Program	61
Working with Proposal Finances	62
Copying a Proposal	63
Working with Team Signoffs	63
Approving a Proposal	64
Rejecting a Proposal	64
Re-opening a Proposal	65
Creating a Project from a Charter/Proposal	65

Putting a Proposal on Hold	65
Projects.....	67
Working with Projects.....	67
Creating a Quick Project.....	69
Basic Details	69
Organization.....	69
Dates	69
Roadmap and Metric types.....	70
Initial Team Members	70
Custom fields.....	70
Searching for Projects	70
Using Project Quick Search.....	71
Text Search within Projects.....	71
Using the Project Module Menu	71
Selecting the Activity Display Mode.....	72
Using the Project Listing Page	72
Using Control Buttons	72
Using the Group by Functionality.....	74
Using the Pivot Functionality	74
Working with Organizations	75
Copying a Project.....	75
Putting a Project on Hold	76
Re-opening Projects	76
Exporting a Project	76
Deleting a Project	77
Working with Project Basics.....	77
Basic project information	77
Classification	78
Organizational unit	78
Confidentiality settings.....	78
Statements and notes.....	78
Financial information	78
Dates.....	78
Keywords	78
Custom fields.....	79
Working with Project Dates.....	79
Changing the Start Date of a Project	80
Setting Phase Due Dates.....	81
Working with Project Roadmaps and Tasks	81
About Project Roadmaps and Tasks	82
Viewing Project Roadmaps	82
Icons on the Project Roadmap	83
About Roadmap Views.....	86

Modifying a Roadmap	87
Using the Gantt View	87
Mouse Over	88
Viewing Critical Path Activities	88
Editing Gantt View	89
Changing Dates and Duration	89
Changing the Percent Complete	89
Creating Dependencies	89
Completing Roadmap and Task Tool Templates	90
Group Edit of the Roadmap	90
Using Keyboard Shortcuts: Project Roadmap Page	91
Project Roadmap Page	91
Working with Project Activities	92
Adding a New Activity or Task	92
Assigning Resources to an Activity or Task	95
Adding a Document to a Roadmap or Task	96
Working with Project Dependencies	96
Working with Project Status Indicators	97
Working with Resource Effort Distribution	98
Working with Efforts and Dates	98
About Effort Types	99
Viewing Finances for an Activity	101
Modifying an Activity or Task	101
Activity Approvals	102
Completing an Activity	103
Managing Project Gates or Phases	103
Complete a Gate Activity	104
Reopen a Gate Activity	104
Working with Generic (Non-WBS) Activities	104
Working with Project Documents	105
Adding a New Document	106
Updating and Deleting a Project Document	106
Working with Project Financial Data	107
Viewing Project Finance Summary	107
Viewing Project Finance Details	108
Editing Financial Data	109
Comparing Finances	109
Requesting Financial Data Validation	110
Validating Financial Data	110
Working with Finance Snapshots	111
Modifying Financial Locks	112
Working with Finance Settings	113
Importing and Exporting Project Information	114
Importing and Exporting Metrics	115

Importing and Exporting Financials.....	116
Exporting Project Data to Microsoft Project.....	117
Importing Project Data from Microsoft Project.....	118
Installing the plug-in.....	119
Associating Programs.....	119
Working with Project Issues.....	120
Adding a New Issue.....	121
Updating Issues.....	122
Deleting Issues.....	122
Closing Issues.....	122
Working with Project Risks	122
Adding a New Risk.....	124
Updating Risks.....	124
Deleting Risks.....	125
Closing Risks	125
Working with Project Metrics	125
Adding a New Metric	126
Editing a Metric	126
Adding Metric Tracking Data	126
Importing and Exporting Metrics	127
Installing the plug-in	128
Working with Project Statements and Notes.....	128
Adding a New Note.....	128
Updating and Deleting a Project Note.....	129
Working with the Statement Generator Wizard.....	129
Working with Project Reports	130
Running Project Reports.....	130
Exporting a Storyboard to Microsoft PowerPoint.....	131
Working with Status Reports	132
Creating a Status Report	132
Copying Status Reports.....	132
Approving Status Reports	133
Working with Project Resources.....	134
Assigning Resources to a Project.....	134
Re-assigning a Team Member to a Role.....	135
Edit Team Member Information	135
View Rate Change History.....	136
Using the EnterpriseTrack Email client.....	136
Using an External Email Client	137
Managing Your Team Picture	137
Deleting a Team Picture.....	137
Working with Resource Assignments.....	137
Create Request for Resource Allocation.....	138

Edit a Resource Allocation Request.....	139
Withdraw a Request for Resource Allocation	140
Reopen Resource Allocation Request.....	140
Release Project Resource Allocation	140
View a Team Member's Calendar.....	141
Working with Project Settings.....	141
Working with Email Project Settings	141
Working with Percent Completion Settings	142
Using Timesheet Settings	143
Selecting Non-WBS Activity Types	143
Programs	144
Working with Programs	144
Creating a New Program	144
Viewing and Printing Program Details.....	145
Program Budget.....	145
Viewing Financial Information for a Program.....	146
Editing Program Evaluation Values	147
Editing a Program	147
Deleting a Program.....	148
Working with Program Non WBS Activities	148
Adding a Program Non WBS Activity	149
Updating or Deleting Program Non WBS Activities	150
Working with Program Issues	150
Adding Program Issues	151
Updating or Deleting Program Issues	152
Working with Program Risks.....	153
Adding Program Risks.....	154
Updating or Deleting Program Risks	155
Working with Program Documents.....	155
Adding a New Program Document	155
Update Program Documents	156
Strategies.....	157
Working with Strategies	157
Navigating the Strategy Module	157
Adding a Node	158
Working with the Organization Nodes.....	159
Viewing the Charts for an Organization node	160
Working with Strategy Nodes.....	160
Working with the Strategy Nodes	161
Specifying Measures for Strategy Nodes	161
Modifying the Order of Measures	161
Setting Status Indicators for Measures	162

Editing Data for Measures	162
Viewing the Strategy Reports.....	162
Associating Programs to a Strategy Node	163
Viewing Program Details	163
Working with Strategic Alignment	163
Knowledge Base	164
Working with Global Documents	164
Navigating the Knowledge Base.....	164
Creating a New Global Document	165
Updating and Deleting Global Documents.....	166
Deleting documents	166
Working with Tool Templates.....	167
Creating a New Tool Template.....	167
Updating Tool Templates	167
Working with Best Practices Documents	168
Resources	168
Working with Resources.....	168
Working with Resource Calendars	169
Modifying Work Hours or Work Days.....	169
Adding Exceptions	169
Delete Calendar Exceptions	169
Viewing Resource Listing Details.....	171
Resource Planning	171
Approving Resources and Requests	173
Social Stream	173
Subscribing and Unsubscribing.....	173
Viewing the Social Stream Page.....	174
Displaying the Social Stream Ticker.....	175
To display the social stream ticker:.....	175
To expand the ticker:.....	175
Using the Social Stream.....	175
Project Stream Settings	175
Timesheets	176
Working with Timesheets.....	176
Using Keyboard Shortcuts: Timesheet Module	176
Viewing Timesheets.....	179
Creating Timesheets	179
Deleting Timesheets.....	180
Editing Timesheets.....	181
Approving Timesheets.....	181
Approving/Rejecting Multiple Timesheets.....	182
Managing Timesheets.....	183

Missing Timesheet Report	183
What-if.....	183
Using What-if Planning.....	186
Creating a Scenario	188
Editing What-if Scenarios	189
Shifting Projects/Proposals or Roles/Resources	189
Excluding/Including Projects or Proposals	189
Editing Hours	190
Global Reports	190
Working with Standard Reports.....	190
About Standard Reports	191
Navigating the Reports Module.....	191
Running Standard Reports	192
User Defined Excel Reports	193
Creating User-Defined Reports.....	193
List of Pre-Defined Standard Reports	195
Listing Reports.....	195
Project Summary Reports.....	198
Project Detail Reports	200
Finance Reports	201
Resource Detail Reports.....	203
Timesheet Reports	205
Working with Adhoc Reports.....	207
Working with Predefined Templates	207
Creating My Reports.....	208
List of Ad-hoc Reports	208
Messages.....	209
Working with Messages	209
Creating a Message.....	210
Surveys	210
Survey Reports	210
Creating a Survey Instance	211
Administering Surveys.....	211
Managing Templates.....	211
Creating a New Survey Template	212
Editing a Template	212
Deleting and Deactivating a Template	212
Managing Questions	212
Creating a New Question	213
Editing a Question	213
Deleting and Deactivating a Question.....	213
Managing Rating Groups	213

Creating a New Rating Group	214
Editing a Rating Group	214
Deleting and Deactivating a Rating Group.....	214
Advanced Features	214
Working with Multiple Currencies.....	214
EnterpriseTrack Mobile.....	215
Downloading and Configuring the Mobile App	215
Entering Account Information	215
Entering your SSO Credentials.....	216
Entering Account Information	216
Entering your Credentials.....	216
Using the Idea Portal	216
Submitting an Idea	217
Searching for Ideas	217
Policies and Procedures.....	217
Legal Notices	218

Navigating Within EnterpriseTrack

Login to the EnterpriseTrack system using the account your administrator has set up for you.

The menu system consists of an Application Level Menu, Module Level Menu, Page Level menu and an Item Level Menu. Common functions are grouped together throughout the application.

Application Level Menu: Appears in the Top Navigation bar and provides access to all major modules and components of EnterpriseTrack.


Module Level Menu: Appears on the Top Navigation bar 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, and Ideas etc. that are assigned to you), your messages, certifications, permission, and calendar.
- ▶ 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.
- ▶ The **Notification** icon indicates the number of new social messages.
- ▶ From the **Help menu**, you can launch the online help in a new window or launch the User Productivity Kit (UPK).

- ▶ From the user profile link, you can access your profile, preferences, password, delegations, and the get EnterpriseTrack mobile menus.
- ▶ 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.

In This Section

Module Level Menus.....	14
View Settings and Persistence.....	15

Module Level Menus

When you click into a specific Idea, Proposal, or Project, the Module Level Menu is shown as the right most item on the left part of the Top Navigation bar. The specific item (Idea, Proposal etc.) with its item number is shown in the menu.

Idea Module Menu

From the Idea module menu, you can do the following:

- ▶ Create a document or an aligned strategy, scorecard, or process.
- ▶ Edit details or assign owners.
- ▶ Delete an idea.
- ▶ Perform workflow actions that move the idea to the next stage in its workflow.

Proposal Module Menu

From the Proposal module menu, you can do the following:

- ▶ Go to pre-project versions.
- ▶ Create documents, linked projects, strategy, process, scorecard, and portfolio.

- ▶ Edit various specifics of this proposal: details, classification, resources, organization, alignment, project justification, finances/currency, dates/durations, evaluation, confidentiality, documents, linked projects, custom fields, and sign-offs.
- ▶ Delete and copy proposals.
- ▶ Save as a PDF file.
- ▶ Perform workflow actions: The available actions are specific to the current state of the proposal and to the configured workflow for your system. These can include manage team sign-offs, reject or hold proposals.

Project Module Menu

You can expand and collapse the Project Module menu from the Left Navigation Bar. From the Project module menu you can do the following:

- ▶ Navigate to various pages of the project: the project basics, dates, project plan, documents and finances, issues, linked projects, sample templates, notes, reports, settings, alignment, resources, change requests, discussions, risks, QA plan, and the associated pre-project.
- ▶ Create various objects associated to the project: documents, issues, linked projects, non-WBS items (change requests, discussions, and risks) metrics, notes, status reports, team members, finance snapshots, strategy, and portfolios.
- ▶ Edit the various objects associated to the project: basic details, classification, organization, confidentiality, project justification, start dates, project dates, shift plan dates, initial finances/currency, finance settings, keywords, and custom fields.
- ▶ Export to MS Excel, MS PowerPoint, and MS Project.
- ▶ Delete, copy, cancel and hold projects.
- ▶ Close phase and change the project plan.

View Settings and Persistence

You can control the views of various aspects of the screen to show or hide elements such as:

- ▶ Left Navigation (Icons and/or Text)
- ▶ Top Banner (showing logo and user name)
- ▶ Toolbars (above lists of projects, work breakdown structure etc.)
- ▶ Column selection (on project lists, work breakdown structure etc.)

You can set the view settings just for this log-in session. Every **View** menu also comes with a **Save View Settings** option that allows you to save your settings for the next log-in.

Note: If the page has a treegrid, then the treegrid setting is saved along with the Display Left Navigation setting. If the page has no TreeGrid, then only the Display Left Navigation setting is saved.

About Consent Notices

Consent notices alert you to the need to protect personally identifiable information (PII). You and your organization might be collecting, processing, storing, and transmitting PII while using EnterpriseTrack. When you accept a consent notice, your consent covers the collection, processing, storing and transmission of PII data in all areas of EnterpriseTrack and means of retrieving data from EnterpriseTrack, including but not limited to project export, downloaded tables, reports, documents, web services, API, user-defined fields, resource profile, and mobile. You might be asked to provide consent to show that you understand the need to treat PII as secure data.

You might also be asked to provide consent for your organization to collect, process, store, and transmit your PII. If you refuse consent, you will be denied access to EnterpriseTrack.

In This Section

Viewing Your Personally Identifiable Information in EnterpriseTrack	16
Viewing Your Privacy Policy	16

Viewing Your Personally Identifiable Information in EnterpriseTrack

To view your PII in EnterpriseTrack, click the **My Preferences** link from the Left Navigation bar and select **Edit Resource Profile**. You can also select the **My Profile** link from the Top Navigation bar. For more information, see the topic *Viewing and Editing User Profiles*.

Viewing Your Privacy Policy

You can view the privacy policy and your consent status details from the My Privacy page. This page is displayed only if your administrator has enabled the Privacy and Settings feature. From this page, you can also choose to withdraw your consent and request to be forgotten.

To view your privacy consent:

- 1) Click the **My Preferences** link from the Left Navigation bar and select **View My Privacy**. You can also select the **My Privacy** link from the Top Navigation bar.
- 2) Click **Done**.

Tip:

You can withdraw your previously given consent at any time by clicking the **Withdraw Consent and Forget Me** button.

Common Features

In This Section

Working with Global Search	17
Using Toolbars	18
Sorting Data	19
Using Filters	19
Advanced Search and Saved Searches	20
Using the Calendar.....	21
Personalizing the Listing Pages.....	21
Attaching Document Files.....	22
Viewing Field History.....	23
Using Fractional Duration and Effort.....	24
Required Fields	25
Logging Out.....	25

Working with Global Search

EnterpriseTrack provides you with a global search feature to allow you to perform a quick search for any of the major components within the system. You can use this feature to search for ideas, proposals, charters, projects, documents, tools etc.

To begin the search, click the **Advanced Search** button in the Top Navigational bar and select one of the menu items. You will be taken to an **Apply Filters** page for that component. Search details for each of the components are given below:

Ideas

In the Ideas Filter page, enter the search criteria and click the **Search** button.

You can view the filters that are currently in effect by selecting **Show Current Search Criteria** link.

Some of the fields that you can filter ideas by are: Status, Name of Idea Owner (or Assignee), the various units in the organizational hierarchy and date on which idea was created.

Proposals

In the Proposals Filter page, enter the search criteria and click the **Search** button.

You can view the filters that are currently in effect by selecting **Show Current Search Criteria** link

Some of the fields that you can filter proposals by are: Initiative, Proposal Name/ID, Status, Keyword, who the proposal was created by or associated with the Functional area in which the proposal is located, the various units in the organizational hierarchy and the date on which proposal was submitted.

In installations with multiple initiatives on the same system, you can also filter by Initiative.

Projects

In the Project Filter page, enter the search criteria and click the **Search** button.

You can view the filters that are currently in effect by selecting **Show Current Search Criteria** link.

Some of the fields that you can filter projects by are: Keywords (check all fields in which to search for keyword), Project Name, Status, Phase, Project association, the various units in the organizational hierarchy and the various roles for the associated initiative.

In installations with multiple initiatives on the same system, you can also filter by Initiative.

Programs

In the Program Filter page, enter the search criteria and click the **Search** button.

Some of the fields that you can filter programs by are: Program name, Programs with project name, Program Manager, Custom fields.

Global Documents

In the Global Document List Filter page, enter the search criteria and click the **Search** button.

You can view the filters that are currently in effect by selecting **Show Current Search Criteria** link.

Some of the fields that you can filter documents by are: Initiative, Name, document type, search string, and location.

Global Tool Templates

In the Adjust Filters for Tool Template List page, enter the search criteria and click the **Search** button. You can view the filters that are currently in effect by selecting **Show Current Search Criteria** link.

Some of the fields that you can filter tools by are: Initiative, Name, document type, search string, and location.

Resources

In the Resource Listing Filter page, enter the search criteria and click the **Search** button.

You can view the filters that are currently in effect by selecting **Show Current Search Criteria** link.

Some of the fields that you can filter tools by are: Associated Initiative, Name, Title, Manager, work location and the various units in the organizational hierarchy.

Using Toolbars

You can perform actions on pages that show lists of objects like the Project Listing, Proposal Listing, and Resource Listing pages either by using a toolbar that shows icons for various actions or by using the pull-down Page Level Menus on the right side of the page.


All functions in the Toolbar are also available from the Page Level Menus. Use the **View** menu to turn on or off the toolbar. Select **Display Print-Data Toolbar** from the **View** menu (**View > Toolbar > Display Print-Data Toolbar**).

Sorting Data

There are several pages within EnterpriseTrack where lists of items are displayed. All lists can be sorted by clicking the column title.

Adding or Removing Sorting Icons

To add or remove the column sorting directional icons

- 1) Click the **TreeGrid User Settings**  button.
- 2) The TreeGrid User Settings dialog is displayed. Select an option from the drop-down list.
- 3) Click **OK**. The page is re-displayed according to your settings.

Page Viewing Options


If you want to show all pages and use the scroll bar to scroll through the pages, do the following:

From the TreeGrid User Settings dialog box, check the **Show all pages** option. Otherwise, leave the check box blank to view one page at a time.



Using Filters

EnterpriseTrack allows you to filter almost all lists based on multiple selection criteria. Ideas, Proposals, Projects, Phases, Deliverables, Tasks, Knowledge base documents, Tool templates, Dashboards, etc. have filters that can be used to narrow down the items listed on a specific page.

To use the filters:

- 1) To view the filter row, select **(Page Menu) View > Filter Row**, or from the toolbar select  .
- 2) Click the **Expand All** button to expand the filter categories. You can select the **Collapse All** button to collapse the list. The filter list is either expanded or collapsed based on the settings selected by your Administrator.
- 3) Click on the box below the column name to view the various filter options.
- 4) Select a filter option and enter your filter criteria in the filter box. For example, you can search for a project that begins with the word Server by selecting the filter option **Begins with** under the column Project Name and typing the word **Server** in the filter box. All projects that match the filter are displayed.

Notes:


- Use the expand  button next to the sub-sections on the **Advanced Search** page to view all the fields that are available to you.
 - Use the collapse  button to hide the fields that are not required and maximize your on-screen real estate.
 - Clicking the **Filter Row** within the context of an initiative brings up projects pertaining only to that initiative.
-

Advanced Search and Saved Searches

The **Advanced Search...** link allows you to perform more refined searches. You can use it to search the database on various categories including attached documents and notes. You can also save these searches along with your column selection, column arrangement, Group by, and Pivot options.

Modifying Advanced Search

To modify the advanced search setting,

- 1) Click the **Advanced Search** link. The *Advanced Search* page is displayed.
- 2) Enter your search criteria. Use the **Expand**  button next to the sub-sections to view all the fields that are available to you.
- 3) You can view the current search criteria by clicking the **Show Current Search Criteria** field.
- 4) Click **Search**.

Note: When you choose to include the documents field in the keyword definition, the system will search through the text of the uploaded project documents.

Managing Saved Search Criteria

To save a new search:

- 1) From the **Manage** pull-down menu, select **Create**.
- 2) Enter a name for this filter.
- 3) Select if you want to set this as your default search.
- 4) Select if you want this search to show up in the mobile Instantis EnterpriseTrack app.
- 5) Select if you want to share this search with other users. This option is available only if you have permissions to share a saved search.
- 6) Specify your search criteria.
- 7) Click **Save Search**.

To edit an existing search:

- 1) From the **Saved Search: View** menu, select the search you want to edit.
- 2) From the **Manage** pull-down menu, select **Edit**.
- 3) From the **Load a Saved Search** pull-down menu, select the search you want to modify.

- 4) Select if you want this search to show up in the mobile Instantis EnterpriseTrack app.
- 5) Select if you want to share this search with other users. This option is available only if you have permissions to share a saved search.
- 6) Make the required changes in the various fields used to specify the search criteria.
- 7) Click the **Save Search** button.

To delete an existing search:

- 1) From the **Saved Search: View** menu, select the search you want to delete.
- 2) From the **Manage** pull-down menu, select **Edit**.
- 3) Click the **Delete Search** button.

Note: Only user-defined searches can be deleted.

To reset filters to default values:

From the *Advanced search* page, click the **Reset Filter** button.

Using the Calendar


There are multiple pages within EnterpriseTrack where you may be required to select a date or a date range. You can either type in a date into the entry field or click the **Calendar** icon to bring up the calendar. Click on a date to select that particular day.


Click **Today** to select today's date. You can move to the next month by clicking on the right arrow or by pressing **CTRL** and the **Right Arrow** keys on your keyboard. To go to the previous month, click the left arrow or press the **CTRL** and the **Left Arrow** keys on your keyboard.

Personalizing the Listing Pages

You can personalize the listing (Project Listing, Proposal Listing, Idea Listing, Program Listing and the Resource Listing) pages by selecting the columns to display, selecting the order of the columns, and modifying the column width. You can also save these settings as a part of your Saved Searches.

To select columns to display:

- 1) From the listing page, click the **Select Columns**  icon or select **Columns** from the **View** menu. The **Select Columns to display** pop-up appears.
- 2) Select the columns that you want displayed and click **OK**. The projects page is refreshed with the selected columns.

Note: The columns with the  icon indicate that these are computed columns. The listing page may take longer to refresh or reload if too many of these columns are selected. For best results, use the computed columns minimally and only when necessary.


To change the order of the columns:

From the listing page, click a column heading and drag it to the desired location. The columns are redisplayed in a new order.


To resize the column width:

From the listing page, click and drag the border of the column to the desired width.


To save column selection and size:

Click the **Save My Settings**  icon, or from the **View** menu select **Save View Settings**.

To turn on/off the filter:



Click the **Turn On/Off Filter** icon  or from the **View** menu select **Filter Row**.

To save your settings:

You can save the column order, selection and size by clicking on the **Save My Settings**  icon or select **(Page Menu) View > Save View Settings**. On subsequent logins, your saved settings are used to display the page.

Note: If the page has a treegrid, then the treegrid setting is saved along with the Display Left Navigation setting. If the page has no TreeGrid, then only the Display Left Navigation setting is saved.

To load your settings:

Click the **Load My Setting**  icon to load your saved layout. You can also click the menu selector  to load the layout specific to a profile or global. This option is available only if your administrator enabled it.

Attaching Document Files

EnterpriseTrack allows you to attach document files to various objects within the system. Documents can be attached to Ideas, Charters or Proposals, Project Issues, Project Notes etc.

- 1) Click the **Create** button on the of the **Documents** section of the appropriate page.
- 2) Enter the relevant information in the **Add a New Document** page.
- 3) You must enter a name for the document.
- 4) For documents that are being added within the context of a project (E.g., to a project note), you may also have the option of selecting a Storyboard Document Mapping. This will determine if and where the document is included when project information is exported to Microsoft PowerPoint.
- 5) Enter the complete path to the document location, or use the **Browse** button to locate it on your machine or the network. You can also enter a fully qualified URL if the document is hosted external to the system.
- 6) For documents that are being added within the context of a project or proposal, you will be able to specify whether a document is confidential or not. You can create a list of users who are allowed to view confidential documents.
- 7) Click **Add Document** to add the document to the selected object.
- 8) The added document will be listed in the **Documents** section of the appropriate page.

Note: In some cases you may not be required to complete the **Add a new Document** page and may be able to just browse to a document location to attach a file.

Editing and Deleting Documents

- 1) To edit the document, click the **Edit** link in the **Action** column.
- 2) Make the appropriate changes. You will not be able to change the name of the document.
- 3) You can click on the **View Revision History** link to see a list of the different versions of this document.
- 4) Click the **Update Document** button to save your changes.
- 5) Click the **Delete Document** button to delete the document. When a document is deleted, its revision history is also deleted.

Downloading a Document

Documents attached to specific objects are displayed in the **Documents** section on the appropriate pages. For example, a document attached to a project note can be downloaded from the **View/Edit Project Note** page.

- 1) To download the current version of the document, click the **Current** link in the download column.
- 2) To view a history of the revisions made to the document click the **Revisions** link. From this page, you may download prior versions of the document by clicking on the link under **File Name/URL**.

Viewing Field History

EnterpriseTrack monitors important field changes and maintains a detailed history of these changes. You can filter, group, print, and export to Excel the contents of this list. The following table lists the Proposal, Project, and Program fields that are supported:

- ▶ Proposal/Charter Fields
 - ▶ Basics: Status, Roadmap
 - ▶ Finance: Initial Finance Fields (Varies based on your Finance Template Configuration)
 - ▶ Dates: Planned Start Date, Actual Start Date, and Planned Project Close Date
 - ▶ Approvals: Sign-off Status
- ▶ Project Fields
 - ▶ Basics: Status, Roadmap, Project Name, Organization Hierarchy, Custom Fields, Confidentiality, Risk/Priority, Classification Fields, Statement and Notes, Project Basics Finance Fields, and Evaluation Criteria
 - ▶ WBS and Non-WBS: Name, Status, Resources, Plan Start, Plan Completion, Actual Start, Actual Effort, Actual Completion, and % Completion
 - ▶ Resource: Resource Creation and Resource Rate Change
 - ▶ Dates: Actual Start Date and Planned Project Close Date
 - ▶ Project Settings

- ▶ Program Fields
 - ▶ Basic Details: All fields
 - ▶ Organization: All fields
 - ▶ Program Budget: All fields
 - ▶ Program Custom Fields: All fields
 - ▶ Statement and Notes: All fields
 - ▶ Associated Proposals
 - ▶ Associated Projects

Note: You cannot disable this feature.

Viewing Field Change History for Proposals

- 1) Navigate to the Proposals/Charters page (**Go To > Proposals**), or select **Proposals** from the Left Navigation Bar.
- 2) Select a proposal.
- 3) From the **Proposal #** menu select **Field Change History**. The *Field Change History* page is displayed.

Viewing Field Change History for Projects

- 1) Navigate to the Projects page (**Go To > Projects**), or select **Project** from the Left Navigation Bar.
- 2) Select a project.
- 3) From the **Project #** menu select **Go To > Field Change History**, or click the **Field Change History** icon on the Left Navigation Bar. The *Field Change History* page is displayed.

Viewing Field Change History for Programs

- 1) Navigate to the Programs page (**Go To > Program**), or select **Program** from the Left Navigation Bar.
- 2) Select a program.
- 3) From the **Program #** menu select **Go To > Field Change History**, or click the **Field Change History** icon on the Left Navigation Bar. The *Field Change History* page is displayed.

Using Fractional Duration and Effort

You can enter duration or effort in decimal numbers in EnterpriseTrack. Note the following conditions when using fractional duration or effort:

- ▶ Fractional duration or effort is retained in the system as long the start and completion dates are not changed. If these dates are modified, the duration is changed to a whole number based on the start and completion dates. You can re-enter the fractional duration.

- ▶ When partial duration or effort is entered for activities that are sequential, EnterpriseTrack does not use the fractional duration or effort when showing the start and end dates for those activities. For example, if the first activity (Activity 1) takes 2.5 days to complete from November 1st, the start date for the second activity (Activity 2) will be shown as November 4th and not November 3rd.
- ▶ When activity dates are changed from the Project Dates page, EnterpriseTrack does not retain the partial duration. The duration is rounded off to the nearest whole number.

Required Fields

There are several actions within EnterpriseTrack that can be saved or applied only if there is a value entered in a required field. Some examples are Idea titles, Proposal and Project Names, Contact information, etc.

Required fields in EnterpriseTrack are always marked with an asterisk * and displayed in red. You must complete these fields to move on to a subsequent step or complete an action.

Logging Out

When you are finished with your work within EnterpriseTrack, always log out of the system before closing your browser.

To log out of EnterpriseTrack click the **Logout** button in the Top Navigation bar.

My Work

The My Work page is the default landing page for all users logging into the system. It displays a list of work items that a user is assigned to within the system.

In This Section

Getting "My Work" Done..... 25

Getting "My Work" Done

The **My Work** page displays a list of all the items that are currently assigned to you. Typically, each line item will require some action from you. To access the **My Work** page, click the **My Work** link from the Left Navigation bar, or select **My EnterpriseTrack > My Work** from the Top Navigation bar.

The My Work page displays the following sections:

- ▶ **Reminders section:** shows items that need to be completed.
- ▶ **Open Work Items section:** shows the name of open item, type of item, project name, current and actual dates for start and completion, etc. for each item.

- ▶ **My Projects section:** displays the status of all projects and includes the status of the current project phase.

Some of the items you will see for each initiative are:

Ideas

If you have Idea approval or routing privileges, you will see a list of ideas waiting for approval or routing. It also displays the ideas that are assigned to you.

Proposal

If you have proposal approval privileges you will see proposals requiring approval.

If you have proposal sign off responsibilities, you will see a link to the proposal sign off request.

If you have submitted a proposal you will see all the proposals you have submitted.

Open Work Items

If you have tasks and activities assigned to you on any projects, each of these will be listed in the Open Work Items section of the My Work page.

You can view the details of a particular task or activity by clicking on its description. This will take you to the project specific information for that particular task or activity.

Financial Validation

If you are a user who is required to validate certain financial data, these will be listed in the Finances section of the My Work page.

Click the appropriate item to be taken to the **Validation** tab within **Project Finances** for that particular project. From this tab you can validate financial data.

Issues

If you have issues assigned to you on any projects, each of these will be listed in the Issues section of the My Work page.

You can view the details of a particular issue by clicking on its description. When an issue is assigned to you, you will also receive a notification at the email address associated with you in the system.

Timesheets

The timesheets that require your approval are displayed in this section.

Pending Approvals: Allocations

The resource allocations that require your approval are displayed in this section.

Status Reports

The status reports requiring your approval are displayed in this section.

- 1) Click the name of the status report to access its details.
- 2) Click the **Approve** button to approve the report.
- 3) Click the **Reject** button to reject it and send it back to the user who submitted it.

If a report you have submitted has been rejected, it will be displayed in this section.

- 1) Click the name of the Status Report to access its details.
- 2) Make the necessary changes and click the **Submit for Approval** button.

My Dashboards

EnterpriseTrack offers managers and executives a variety of visual summaries of their initiative deployment. The dashboards depict aggregate numbers of projects, total savings, etc.

In This Section

Working with Dashboards.....	27
Viewing Dashboards	27
Reading the Executive Dashboard	28
Reading the Project Dashboard.....	29
Managing Dashboards	29
Available Dashboard Components	30

Working with Dashboards

EnterpriseTrack has the following two pre-defined Dashboards that provide quick summaries of project specific and system wide information.

- ▶ Executive Dashboards
- ▶ Project Dashboards

You can also create and share your dashboards with others. These will be displayed in the **User defined Dashboards** section.


The graphs can be copied using the browser's right-click menu and pasted into other programs (like MS Word). You can also create PDF files from your dashboard, and perform What-if analyses based on cycle time changes from the Dashboard.



Note: For more information on working with dashboards, see the *Dashboard User Guide*.

Viewing Dashboards

To view dashboards, from the Top Navigation bar, select **Go To>Dashboard> View**.








You can select the type of Dashboard you want to view, using the *Select Dashboards* pull-down menu on the top right corner of the screen.

Icons	Description
 Manage	Click to manage dashboards. You can create, copy, paste,

	edit, and share dashboards. You can also set filters for each component in the dashboard.
 Refresh	Click to refresh a dashboard. The graph is recomputed using the latest data in the system. You can also update each component in the dashboard separately.
 PDF	Click to generate a PDF to print or email. You can choose the layout selection by selecting one, two, or four components per page.

Components in the Dashboard

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

Icons	Description
	Click to open the Inline Filter box. Inline Filters provide instant access to some of the most commonly used filter fields. Inline Filters are simple to use. For more information, see topic Using In-Line Filters.
	Click to set filters and display options for each component.
	Click to save a dashboard as a PDF file.
 	Click to maximize the component screen. Click to minimize the component screen.
	Click to refresh the component.
	Click for a description of the component.

Mouse-Over

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

Drill-Down

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

Reading the Executive Dashboard

In most EnterpriseTrack installations, the Executive Dashboard shows five high level visual reports:

- ▶ Project Count by Status
- ▶ Average cycle time by Executive
- ▶ Proposal Evaluation Criteria (Attractiveness of project vs. Cost)
- ▶ Aggregate Month-by-Month Financial Savings for all projects
- ▶ User distribution by Title

To view the Executive dashboard

- 1) Click on **My Dashboards** in the left navigation bar. Select Executive Dashboard from the **Select Dashboard:** pull-down menu.
- 2) Click on any of these graphs to view a second level of detail. You can further drill down to project and proposal level information from here.
- 3) Position your mouse over a particular section of the graph view details about that section.
- 4) Click the **Edit Component Filters** button to edit the display component setting for each graph.
- 5) Click the **Maximize** button to view the graph in full-screen mode. Click the **Restore** button to toggle back from the full-screen mode.

Reading the Project Dashboard

The Project Dashboard displays project specific information for all projects and initiatives within the system. In most EnterpriseTrack installations you can view:

- ▶ Project timelines by project number and month
- ▶ Total finances for all projects
- ▶ Project metrics: primary, baseline and target
- ▶ Open activities for all projects
- ▶ Open tasks for all projects
- ▶ Open issues for all projects

To view the Project dashboard

- 1) Click on **My Dashboards** in the left navigation bar. Select Project Dashboard from the **Select Dashboard:** pull-down menu.
- 2) Click the graphs and individual rows to view greater levels of detail. You can further drill down to view project and proposal level information from here.
- 3) Position your mouse over a particular section of the graph to view details about that section.
- 4) Click the **Edit Component Filters** button to edit the display component setting for each graph.
- 5) Click the **Maximize** button to view the graph in full-screen mode. Click the **Restore** button to toggle back from the full-screen mode.

Managing Dashboards

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

Note: For more information on working with dashboards, see the *Dashboard User Guide*.

Available Dashboard Components

In This Section

Proposals (Charters)	30
Projects (General)	31
Projects (Count)	32
Project (Cycle Time).....	35
Projects (Finances)	38
Projects (Metrics)	42
Resource.....	43

Proposals (Charters)

There is one component with the evaluation criteria.

Component	Description	Drill Down	Drills To
Proposal Evaluation Criteria	<ul style="list-style-type: none"> ▶ Proposal evaluation Criteria ▶ This chart displays bubble chart of proposal (charter) for Proposal (Charter) that qualify the filter criteria. ▶ The X and Y Axis are represented by evaluation criteria. ▶ The size of the bubble is determined by the initial financial forecast value of the proposal. ▶ You must select the appropriate Initiative (if applicable) and the # of Proposal (Charter) to display. (Max 40 at a time). 	Yes	Proposal Details Page

Projects (General)

These dashboards only work with a specific user that has assigned projects. Administrator and users without any assigned projects will see a blank chart. Users will also not be able to see system wide information.

Component	Description	Drill Down	Drills To
Project Timeline	<ul style="list-style-type: none"> ▶ Project Timeline ▶ The chart displays project timeline by phases for any projects that meet the filter criteria ▶ You can filter the display using various filter criteria. You can also use program as a filter. If selected, all projects belonging to the selected program are displayed. ▶ You can also select the display timeline (Actual and Plan, Actual, or Plan). 	Yes	You can choose if you want to drill down to the Project Basics, Project Dates, or Project Status Report page.
Project Activities List	<ul style="list-style-type: none"> ▶ Project Activities List ▶ The chart displays a list of activities assigned to any user. You can filter the list to view Open, Not Applicable or Completed activities. You can also filter to view Non-WBS and WBS activities, and also milestone and key milestone activities that are pending, past due, or completed. ▶ Click on a link to drill down to view activity details. 	Yes	Project Roadmap page
Project Issues List	<ul style="list-style-type: none"> ▶ Project Issues List ▶ The chart displays the list of project issues. ▶ You can also filter on My Projects and also search for other projects. You can also filter to view issues that are not assigned to a 	Yes	Project Edit Issue page

Component	Description	Drill Down	Drills To
	<p>resource.</p> <ul style="list-style-type: none"> ▶ Click on a link to drill down to view issue details. 		
Project Bubble Chart	<ul style="list-style-type: none"> ▶ Project Bubble Chart ▶ Displays a project bubble chart based on your filter criteria. ▶ You can customize the chart by selecting the parameters to display on the X axis and Y axis. ▶ You can also swap the X and Y axis parameters. ▶ Click on a link to drill down to view the Project Basics page. 	Yes	Project Basics page

Projects (Count)

Component	Description	Drill Down	Drills To
Project Count by Org	<ul style="list-style-type: none"> ▶ Project Count by Organization ▶ The chart displays the number of projects on Y-Axis that qualify the filter criteria and Organization on X-Axis. ▶ User can select different level of organization to show on the X-Axis from the filter criteria. ▶ Projects that aligned to multiple organizations will be counted in multiple organizations. ▶ User can click on a bard to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report
Project Count by Period	<ul style="list-style-type: none"> ▶ Project Count by Period ▶ The chart displays number of projects on Y-Axis that qualify the filter criteria and reporting period on X-Axis. 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	<ul style="list-style-type: none"> ▶ Projects that start in one year and end in the next year will be counted in both years. ▶ Current quarter figures are as of the current date. ▶ Current year is displayed as YYYYYYTD e.g. 2009YTD. YTD means Year to Date. ▶ Prior quarter and year end figures are as of the last day of the period. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 		
Project Count by Status	<ul style="list-style-type: none"> ▶ Project Count by Status ▶ The chart displays the number of projects on Y-Axis that qualify the filter criteria and Current Project Status on X-Axis. ▶ User can click on a bar to drill down to the project types and then to the list of projects that contribute to the bar. ▶ The chart shows system wide project counts, except confidential projects, depending on the user's permission. 	Yes	Project Listing Report
Project Count by Classification	<ul style="list-style-type: none"> ▶ Project Count by Classification ▶ The chart displays the number of projects that qualify the filter criteria on Y-Axis and the selected classification field on X-Axis. ▶ Projects that are aligned to multiple classification fields will be counted in multiple classifications. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
Project Count by Alignment	<ul style="list-style-type: none"> ▶ Project Count by Alignment ▶ The chart displays the number of projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. ▶ This chart only works when the system has an Alignment (Strategy) configured. ▶ Projects that are aligned to multiple alignments will be counted in multiple alignments. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report
Project Count by Phase	<ul style="list-style-type: none"> ▶ Project Count by Phase ▶ The chart displays the number of projects that qualify the filter criteria on Y-Axis and Phases on X-Axis. ▶ Within a Phase projects are grouped by their on-time status ("On Schedule", "Schedule At Risk" and "Behind Schedule") ▶ If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. ▶ If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
Project Count by Phase Cycle Time Grouping	<ul style="list-style-type: none"> ▶ Project Count by Phase Cycle Time Grouping ▶ The chart displays the number of Phases closed in the recommended Phase duration (Red, Amber, and Green) for projects that qualify the filter criteria on Y-Axis and Phases X-Axis. ▶ If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. ▶ If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report
Project Count by Custom Fields	<ul style="list-style-type: none"> ▶ Project Count by Custom Fields ▶ The chart displays the number of projects that qualify the filter criteria on the Y-axis, and the selected custom field on the X-axis. The custom fields are set by your Administrator and can be modified by clicking the <i>Edit Filters</i> button. ▶ Click on a bar to drill down to the list of projects. 	Yes	Project Listing Report

Project (Cycle Time)

Component	Description	Drill Down	Drills To
Project Cycle Time by Period	<ul style="list-style-type: none"> ▶ Project Cycle Time by Period ▶ The chart displays projects cycle time by various Phases on Y-Axis for projects that qualify the filter 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	<p>criteria and reporting period on X-Axis.</p> <ul style="list-style-type: none"> ▶ Projects that start in one year and end in the next year will be counted in both years. ▶ Current quarter figures are as of the current date. ▶ Current year is displayed as YYYYYYTD e.g. 2009YTD. YTD means Year to Date. ▶ Prior quarter and year end figures are as of the last day of the period. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 		
Project Cycle Time by Role	<ul style="list-style-type: none"> ▶ Project Cycle Time by Role ▶ The chart displays the average cycle time for projects on Y-Axis that qualify the filter criteria and Users on X-Axis. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. ▶ The user selection is based on the System Access Profile definition then must be further defined by an individual user level selection. 	Yes	Project Listing Report
Project Cycle Time by Alignment	<ul style="list-style-type: none"> ▶ Project Cycle Time by Alignment ▶ The chart displays the cycle time for projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. ▶ This chart only works when the system has an Alignment (Strategy) configured. ▶ Projects that are aligned to multiple alignments are counted in multiple alignments. ▶ Click on a bar to drill down to the list of projects that contribute to 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	<p>the bar.</p> <ul style="list-style-type: none"> ▶ User can select to display by Average or Median days of the cycle time. 		
Project Cycle Time by Classification	<ul style="list-style-type: none"> ▶ Project Cycle Time by Classification ▶ The chart displays the cycle time for projects that qualify the filter criteria on Y-Axis and the selected classification field on X-Axis. ▶ Projects that are aligned to multiple classification fields will be counted in multiple classifications. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. ▶ In a multi-Initiative system, a selection must be made to specify the Initiative to be used. 	Yes	Project Listing Report
Project Cycle Time by Phase	<ul style="list-style-type: none"> ▶ Project Cycle Time by Phase (Box Chart) ▶ The chart displays box plot of cycle tie on Y-Axis and Phases X-Axis. ▶ If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. ▶ If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. ▶ Only the completed phases will be counted towards calculation of the box plot as on-going (or active) phase does not have the actual end date of the phase. 	Yes	Project Listing Report
Project Cycle Time by Organization	<ul style="list-style-type: none"> ▶ Project Cycle Time by Organization ▶ The chart displays the cycle time for projects on Y-Axis that qualify 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	<p>the filter criteria and Organization on X-Axis.</p> <ul style="list-style-type: none"> ▶ User can select different level of organization to show on the X-Axis from the filter criteria. ▶ Projects that aligned to multiple organizations will be counted in multiple organizations. ▶ User can click on a bard to drill down to the list of projects that contribute to the bar. 		
Project Cycle Time by Custom Fields	<ul style="list-style-type: none"> ▶ Project Cycle Time by Custom Fields The chart displays the cycle time for projects that qualify the filter criteria on the Y-axis, and the selected custom field on the X-axis. The custom fields are set by your Administrator and can be modified by clicking the <i>Edit Filters</i> button. ▶ Click on a bar to drill down to the list of projects. 	Yes	Project Listing Report

Projects (Finances)

Components	Description	Drill Down	Drills To
Project Finances by Org	<ul style="list-style-type: none"> ▶ Project Finances by Organization ▶ The chart displays the total for selected financial categories on Y-Axis for projects that qualify the filter criteria and Organization on X-Axis. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. ▶ The chart can be displayed on different levels of the defined organization structure by the filter selection. 	Yes	Project Listing Report

Components	Description	Drill Down	Drills To
Project Finances by Period	<ul style="list-style-type: none">▶ Project Finances by Period▶ The chart displays the realized vs. forecast finances on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis.▶ Current quarter figures are as of the current date.▶ Current year is displayed as YYYYYYTD e.g. 2009YTD. YTD means Year to Date.▶ Prior quarter and year end figures are as of the last day of the period.▶ User can click on a bar to drill down to the list of projects that contribute to the bar.▶ The Forecast is the total finances that are current for all projects in the system.▶ The Realized (Actual) is the total finances that are locked for all projects in the system.	No	N/A

Components	Description	Drill Down	Drills To
<p>% of Projects with Finances by Period</p>	<ul style="list-style-type: none"> ▶ % of Projects with Finances by Period ▶ The chart displays the percent of projects with financial benefits on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. ▶ If more than one financial category is selected, then the percent of projects with benefits is calculated base on the sum of the selected financial categories. ▶ If a project contributes to more than one year, the project's financial impact will be attributed to the corresponding reporting period. ▶ Current quarter figures are as of the current date. ▶ Current year is displayed as YYYYYTD e.g. 2009YTD. YTD means Year to Date. ▶ Prior quarter and year end figures are as of the last day of the period. ▶ User can click on a bar to drill down to the project types and then to the list of projects that contribute to the bar. 	<p>No</p>	<p>N/A</p>
<p>Finance Line Chart by Period</p>	<ul style="list-style-type: none"> ▶ Finance Line Chart by Period ▶ The chart displays Net Finances on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	<p>Yes</p>	<p>Project Listing Report</p>
<p>Priority by Finances</p>	<ul style="list-style-type: none"> ▶ Priority by Finances ▶ The chart displays the Risk or Priority on Y-Axis for the projects that qualify the filter criteria and Finances on X-Axis. ▶ User can click on a bubble to drill 	<p>Yes</p>	<p>Project Basics page</p>

Components	Description	Drill Down	Drills To
	down to the individual projects.		
Project Finances by Alignment	<ul style="list-style-type: none"> ▶ Project Finances by Alignment ▶ The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and immediate children of selected Alignment node on X-Axis. ▶ This chart only works when the system has an Alignment (Strategy) configured. ▶ Projects that are aligned to multiple alignments will be counted in multiple alignments using specified percent allocation. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report
Project Finances by Classification	<ul style="list-style-type: none"> ▶ Project Finances by Classification ▶ The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and selected classification field on X-Axis. ▶ Projects that are aligned to multiple classification fields will be counted in multiple classifications. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 	Yes	Project Listing Report
Project Finances by Phase	<ul style="list-style-type: none"> ▶ Project Finances by Phase ▶ The chart displays the sum of finances of projects that qualify the filter criteria on Y-Axis and Phases X-Axis. ▶ If one Roadmap is selected in the filter, then the Phases are displayed the order specified in the Roadmap. ▶ If multiple Roadmaps are selected in the filter, then the Phases are displayed alphabetically. 	Yes	Project Listing Report

Components	Description	Drill Down	Drills To
	<ul style="list-style-type: none"> ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 		
Project Finances by Custom Fields	<ul style="list-style-type: none"> ▶ Project Finances by Custom Fields ▶ The chart displays the sum of finances for projects that qualify the filter criteria on the Y-axis, and the selected custom field on the X-axis. The custom fields are set by your Administrator and can be modified by clicking the <i>Edit Filters</i> button. ▶ Click on a bar to drill down to the list of projects. 	Yes	Project Listing Report

Projects (Metrics)

Component	Description	Drill Down	Drills To
% Change In Metrics By Period	<ul style="list-style-type: none"> ▶ % Change In Metrics By Period ▶ The chart displays the percent change in metrics on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis ▶ The chart can report on either primary project metric or specific metric type. (One at a time.) ▶ Projects that start in one year and end in the next year will be counted in both years. ▶ Current quarter figures are as of the current date. ▶ Current year is displayed as YYYYYTD. E.g. 2009YTD where YTD means Year to Date. ▶ Prior quarter and year end figures are as of the last day of the 	Yes	Project Listing Report

Component	Description	Drill Down	Drills To
	<p>period.</p> <ul style="list-style-type: none"> ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. 		
Project Metrics Timeseries	<ul style="list-style-type: none"> ▶ Project Metrics Timeseries ▶ The chart displays Primary Metrics on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis for the projects that the current user is associated with. ▶ Note: Administrator will not see any information when running this dashboard. 	No	N/A

Resource

Component	Description	Drill Down	Drills To
Resource Certifications by Period	<ul style="list-style-type: none"> ▶ Resource Certifications by Period ▶ The chart displays the number of user certifications by certification type on Y-Axis for projects that qualify the filter criteria and reporting period on X-Axis ▶ This chart shows information only when there is associated certification defined in the system. ▶ Current quarter figures are as of the current date. ▶ Current year is displayed as YYYYYYTD. E.g. 2009YTD where YTD means Year to Date. ▶ Prior quarter and year end figures are as of the last day of the period. 	Yes	Resource Professional Certification Report
Resource Count by System Access Profile	<ul style="list-style-type: none"> ▶ Resource Count by System Access Profile ▶ The chart displays a pie chart of distribution of resources that qualify the filter criteria. 	Yes	Resource Listing Page

Component	Description	Drill Down	Drills To
	<ul style="list-style-type: none"> ▶ Resources are grouped by System Access Profile. ▶ The filters are available to select the resources based on the organization hierarchy and/or the status of the resource within the system. 		
Resource Certifications by Org	<ul style="list-style-type: none"> ▶ Resource Certifications by Organization ▶ Displays the number of certifications for resources that qualify the filter criteria on Y-Axis and organization on X-Axis. ▶ This chart shows information only when there is associated certification defined in the system. ▶ User can click on a bar to drill down to the list of projects that contribute to the bar. ▶ The chart can be displayed on different levels of the defined organization structure by the filter selection. ▶ Appropriate Initiative should be selected in filter. 	Yes	Resource Professional Certification Report
Resource Utilization (%)	<ul style="list-style-type: none"> ▶ Resource Utilization (%) ▶ The chart displays Heat map by resource. ▶ The user is allowed to select multiple initiatives if more than one is configured. ▶ This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. ▶ Both plan and actual % are always displayed. ▶ Display can be configured for daily or monthly. 	Yes	Heat Map by Resource Report
Project Effort	<ul style="list-style-type: none"> ▶ Project Effort ▶ The chart displays Heat map by project. ▶ The user is allowed to select multiple initiatives if more than one 	No	N/A

Component	Description	Drill Down	Drills To
	<p>is configured.</p> <ul style="list-style-type: none"> ▶ This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. ▶ Both plan and actual hours are always displayed. ▶ Display can be configured for daily or monthly. ▶ 		
Project Effort by Project Type, or by Project Methodology, or by Organization, or by Alignment, or by Classification	<ul style="list-style-type: none"> ▶ Project Effort (Hours) by Project Type, or by Project Methodology, or by Organization, or by Alignment, or by Classification ▶ The chart displays Heat map by project. ▶ The user is allowed to select multiple initiatives if more than one is configured. ▶ This chart is associated with PMO module, thus if PMO feature is not used, this might not be available. ▶ Both plan and actual hours are always displayed. ▶ Display can be configured for daily or monthly. 	No	N/A

My Messages


In This Section

Working with My Messages 45

Working with My Messages

EnterpriseTrack allows users with appropriate permissions to send broadcast messages to other users in the system. Users who receive these messages can read them on the **My Messages** page. Users can also view any documents that are attached to messages from this page.

Reading a Message

If a new message has been sent to you, you will be taken to the **My Message** page when you log into the system. You can also navigate to this page by clicking the  **My Messages** link in the Left Navigation bar, or from the **My EnterpriseTrack** menu on the Top Navigation Bar.

Deleting a Message

To delete a message on the **My Messages** page, click the **Delete** link in the Action column.

My Preferences

In This Section

Password History and Expiry.....	46
Changing Your Password.....	46
Viewing and Editing User Profiles.....	47
Changing Preferences.....	47
Viewing Certifications.....	48
Viewing User Permissions.....	48
Working with your Calendar.....	48

Password History and Expiry

Your Administrator may set your passwords to expire after a set number of days. After successfully logging into the system you may be forced to change your password. To change your password see topic **Changing Your Password** (on page 46). If your Administrator has enabled password history, then you may not be able to use the last three or five passwords. When you successfully change your password, you will receive your User ID and your password in separate emails.

Changing Your Password

To change your password:

- 1) Click the **Change password** link.
- 2) Enter your current password in the **Old Password** field.
- 3) Enter your new password in the **New Password** field.
- 4) Enter the same new password in the **Confirm Password** field.

Note: Passwords in EnterpriseTrack must be at least 8 characters long and contain at least one character that is not alphanumeric, '_' or a whitespace.

Viewing and Editing User Profiles

To view and update your user profile:

- 1) Click the **My Preferences** link from the Left Navigation bar and select **Edit Resource Profile**. You can also select the **My Profile** link from the Top Navigation bar.
- 2) Make any necessary changes to your personal information.
- 3) Click **Browse** and select your profile picture.
- 4) You can also modify your areas of expertise.
 - ▶ Shift-select from **Available Areas** show on the left and click the **Add** button.
 - ▶ Type in additional areas of expertise as required in the **Selected Areas** list on the right.
 - ▶ Click the **Clear** button to remove all areas of expertise from your profile.
- 5) Click the **Update** button to save your changes.


Export Personal Details

To export your personal details including your profile picture, click the **Export Personal Details** button.

Changing Preferences

You can use the Edit Resource Preferences page to modify the following settings: date format, date separator, time format, UI skin, and language.

To modify your preferences:


- 1) Click the  **My Preferences** link in the Left Navigation bar, or select it from your user profile link menu on the Top Navigation Bar.
- 2) Click the **My Preferences** link. The *Edit Resource Preferences* screen is displayed.
- 3) Select from the following preferences:
 - ▶ **Date Format**: Select how you want dates to be displayed.
 - ▶ **Date Separator**: Select how you want the date, month, and year to be separated.
 - ▶ **Time Format**: Select how you want the time to be displayed.
 - ▶ **Language**: Select your language. All system-generated emails are also displayed in the language you select here.
 - ▶ **Use Browser Language**: Select this check box to make the language displayed by EnterpriseTrack match your browser's language setting. When the Use Browser Language check box is not selected, EnterpriseTrack is displayed in the language selected in the Language drop-down list.
 - ▶ **Include Archived Pull Downs in Filter**: Select this check box if you want to view archived pull-down values in filters.
 - ▶ **Include Invalid Pull Downs in Filter**: Select this check box if you want to view invalid pull-down values in filters.
- 4) Click **Update**.

Note: The language selected in the Language drop-down list also

determines the language of system-generated emails.


Viewing Certifications

To view your certifications:

- 1) Click the  **My Preferences** link in the Left Navigation bar.
- 2) Click the **View Certifications** link. A detailed list of your certifications is displayed.
- 3) Click **Done**.

Viewing User Permissions

To view a list of all your permissions:

- 1) Click the  **My Preferences** link in the left navigation bar.
- 2) Click the **View Permissions** link.
- 3) You will see a list of all the actions you are allowed to perform within EnterpriseTrack. Your system access profile determines the global permissions you have, and your role on a project determines your project specific permissions. You cannot make changes to this list. Only the administrator can modify user permissions.

Note: If you do not see some functionality that is referred to in the EnterpriseTrack system, please check to see if you have the required permission to undertake the operation you are seeking. If needed, contact your administrator to add the required permission to your system access profile or allowed role.

Working with your Calendar

Your calendar is based on a Reference Calendar that is set by your Administrator or Project Manager. All exceptions (working and non-working) set in the Reference Calendar are automatically applied to your calendar. You can modify your calendar by changing your reference calendar, work hours, work days, and by adding, modifying or deleting calendar exceptions. Calendar exceptions are used to mark your vacations or your extra work days.

Viewing your Calendar

To view your calendar:

- ▶ Navigate to **My EnterpriseTrack > My Calendar**. Use the tabs to view the calendar for a specific month or year.

Adding Exceptions

To add a calendar exception:

- 1) Navigate to **My EnterpriseTrack > My Calendar**. The *Edit Resource Calendar* page is displayed.

- 2) Select a date by clicking on it. You can use the tabs to navigate to a different month or year. The *Manage Exceptions* pop-up window displays.
- 3) Enter a name for this exception.
- 4) Select if you want to set it as a working day or a non-working day.
- 5) Click **Save**.

Note: You must have the **Edit All Resource Calendar** permission to edit a reference calendar.

Deleting Exceptions

To delete a calendar exception:

- 1) Navigate to **My EnterpriseTrack > My Calendar**. The *Edit Resource Calendar* page is displayed.
- 2) Click on the exception to select it. The *Manage Exception* pop-up window is displayed.
- 3) Click **Delete**.

My Delegations


In This Section

Viewing your Assigned Delegations.....	49
Adding a New Delegation	50
Managing your Delegations	50

Viewing your Assigned Delegations

The timesheet delegations that are assigned to you are displayed on the My Delegations page. It shows the type of delegation, status, start date, end date, and the name of the person who assigned this delegation to you.

To view your assigned delegations:


- 1) From your user profile link menu, select  **My Delegations**.
- 2) Click on the **Assigned** tab.

Note: If your administrator has changed the timesheet approval settings, you may no longer have the ability to approve or reject timesheets.

Adding a New Delegation

Use the Manage Delegations page to delegate timesheet approvals to other users. You can specify the time period for the delegation and the user you are delegating the approval to. The delegate will inherit, for the specified duration, the ability to approve or reject all timesheets assigned to you. A notification email is sent to the resource when they are assigned as a delegate.


To add a new delegation:

- 1) From your user profile link menu, select  **My Delegations**.
- 2) Click the **Manage** tab.
- 3) Click **Add**.
- 4) Enter the start and end dates.
- 5) Select the resource you want to assign to this delegation.
- 6) Click **Ok**.

Managing your Delegations


Editing your Delegations

To edit your timesheet delegations:

- 1) From your user profile link menu, select  **My Delegations**.
- 2) Click the **Manage** tab.
- 3) Click to select the delegation you want to edit.
- 4) Click **Edit**.
- 5) Make the required changes. You can change the start and end dates of the delegation, and change the resource assigned to this delegation.
- 6) Click **Ok**.

Deleting your Delegations

To delete a timesheet delegation:

- 1) From the your user profile link menu, select  **My Delegations**.
- 2) Click the **Manage** tab.
- 3) Click to select the delegation you want to delete.
- 4) Click **Delete**.
- 5) Click **Ok** to confirm the delegations.

Note: Notification emails are sent to the delegates when you edit or modify the delegations.

Ideas

In This Section

Working with Ideas	51
Creating an Idea.....	52
Editing an Idea	53
Creating a Proposal from an Idea.....	54
Searching for Ideas	54
Using Ideas List Filter.....	54
Assigning an Owner for an Idea	54
Re-opening an Idea.....	55
Rejecting an Idea	55

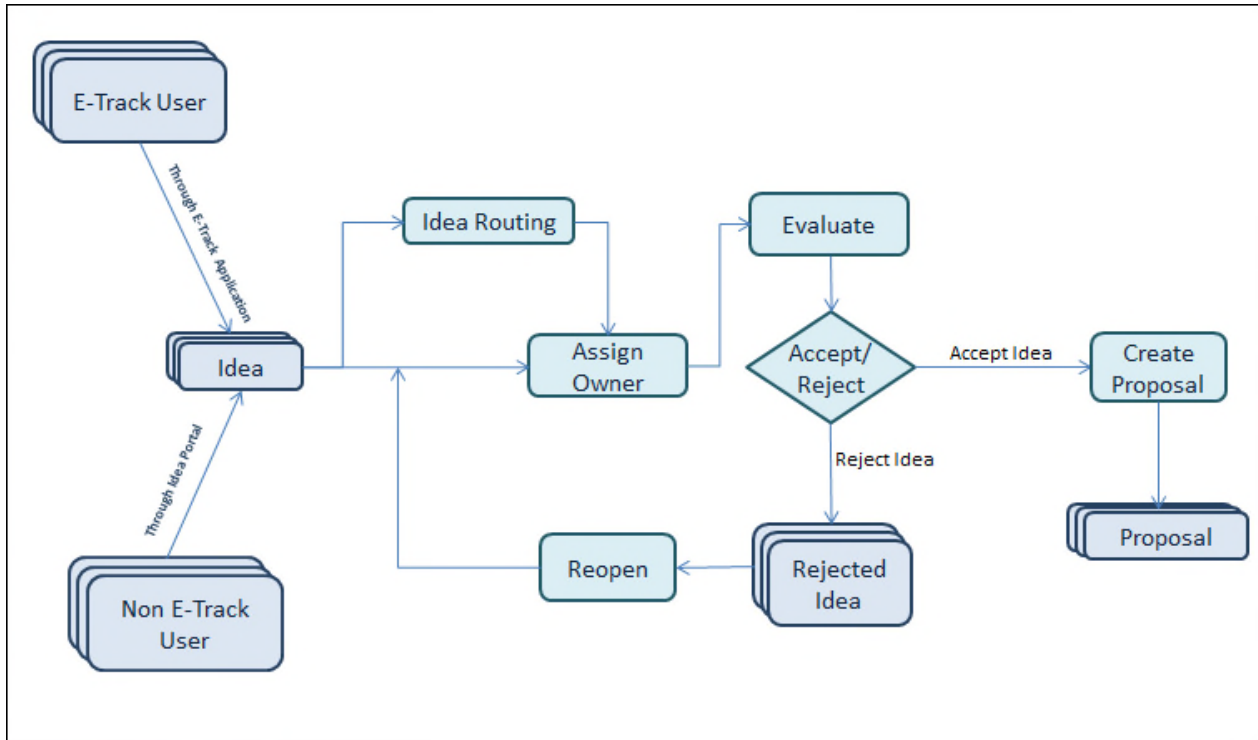
Working with Ideas

Ideas are an optional step in the path to creating a new project. To view ideas that are currently in the system, click the **Ideas** link in the Left Navigation bar, or select **Go To > Ideas** from the Top Navigation bar.

The default view is all active ideas in the system. Active ideas are defined as those ideas that are unassigned and those that are pending evaluation. Accepted and rejected ideas are not displayed, but can be viewed by using the Ideas List filter. The *Next Action* column displays the next action that needs to be taken on an idea. The Display Workflow shows the current state of the idea in the overall idea work-flow. The next possible states are also highlighted.

All users with access to the system can view all ideas, including the details of those ideas.

Idea Workflow



Idea Status

New: All ideas that are currently available to be accepted as proposals or rejected.

Owner assigned: All ideas that have been assigned an owner, but have not been saved as proposals or rejected.

Rejected: All ideas that have been rejected.

Proposal Created: All ideas from which proposal have been created.

Creating an Idea

To create an Idea:

- 1) Click the **Ideas** link in the left navigation bar, or select **Go To > Ideas** from the Top Navigation bar.
- 2) Click **Create**.
- 3) From the **Create a New Idea page**, enter the following information:
 - a. Enter a title for this idea.
 - b. Enter your first name, last name, contact phone number, and your email address.


- c. Complete the Idea Details section. Select an initiative and choose the organizational unit under which this particular idea should be included. If a specific hierarchy is being enforced within your system, the page will refresh to update the appropriate pull down menus. You can also click **Auto-Fill** and have the system automatically enter this information for you. Verify that this information is accurate.
- 4) Complete other relevant sections. Use the **Details Help** link to ensure your idea is as complete as possible.
- 5) Enter values for any custom field your administrator has created. If your administrator has configured a tool tip, you can mouse over the **Information** icon to view the help text.
- 6) Click **Create Idea**. Once an idea is created it will follow the workflow that has been created by your administrator.

Notes:

- To enter the evaluation metrics for an idea, you must first create an idea. Once you see the idea in the Ideas list, you can update it from the Edit Idea page.
 - If an idea is marked confidential, the idea submitter's name is not displayed in the Ideas page.
 - If an idea is rejected, a notification email is sent to the idea creator.
-


Editing an Idea

To edit an Idea

- 1) Click the  icon next to the Idea you want to edit and select **Edit > Details**.
- 2) Make the required changes to the idea. Oracle recommends that you use the **Details Help** to ensure that your idea is as complete as possible.
- 3) Enter the metrics for evaluating an Idea. The different evaluation criteria and weights in this section are standardized for the system and set up during configuration. Oracle recommends that you use the **Evaluation Help** as a guideline for creating the scores for each criterion. You can modify the weights and impact only if you have the Edit Idea Evaluation Criteria permission. The administrator can modify the weights, names, and help descriptions if required.
- 4) You can attach document files by clicking the **[Add Doc]** link.
- 5) Click **Update Idea** to save changes.

Using Quick Edit

To edit an idea from the main Idea page:


- 1) Click the  icon next to the Idea you want to edit and select **Quick Edit**. The columns you can edit are highlighted in pink.
- 2) Make the required changes.
- 3) Click the **Save**.

Deleting an Idea

If you have the appropriate permissions, you will be able to delete an idea. Click the **Delete** button on the Idea details page. If a proposal has already been created from the idea, you will have to delete the proposal before you delete the idea.

Creating a Proposal from an Idea

Only users with the appropriate permission can create a proposal from an idea. Depending upon the work-flow, Ideas may need to be approved before they can become proposals. Irrespective of this, the first step to creating a proposal from an Idea is to click on the title of the Idea in the **Ideas** section of **My Work**.

- 1) On the **Ideas** page, click the  icon next to the Idea you want to select and choose **Workflow > Accept Idea & Create Proposal**. You have now created a new proposal and will be taken directly to the **Proposal Details** page.
- 2) Assign the initial team to the proposal and save your changes for the proposal to be sent to a Proposal Approver. Once a proposal has been approved, a project can be created out of that proposal.

Note: An email is sent to the user who created the idea (and the idea router, if any) to notify them that a proposal has been created from their idea.

Searching for Ideas

EnterpriseTrack allows you to specify multiple selection criteria for ideas that are displayed on the **Ideas** page. This allows you to find other ideas that are relevant to your own idea so that you can benefit from them. EnterpriseTrack also allows you to save specific search criteria to a personalized list of searches.


For detailed instructions see topic **Advanced Search and Saved Searches** (on page 20).

Using Ideas List Filter

EnterpriseTrack allows you to filter the ideas that are displayed on the Ideas page based on multiple selection criteria. For more information see topic **Using Filters** (on page 19).

Assigning an Owner for an Idea

Once an idea is created, it must be assigned an owner.

- 1) Click the  icon next to the Idea you want to edit and select **Edit > Assign Owner**.
- 2) In the *Assign Owner* pop-up window, select the name of the Idea Owner and click the **Assign Owner** button. The system will save your changes and close the pop-up window. You can view the Idea details in the main window..

Re-opening an Idea


Ideas that have been rejected can be re-opened by users who have the appropriate permissions.

To re-open an idea, click the **ReOpen** button on the **Display Idea** page. The idea is re-opened and the display idea page refreshes to display the **Edit** and other action buttons.

Note: The **Reject Reason** field displays the reason for which the idea was originally rejected.

Rejecting an Idea

Based on your permissions, you may be able to reject an idea.

- 1) Click the  icon next to the Idea you want to reject and select **Workflow > Reject**.
- 2) Enter a reason for rejecting the idea.
- 3) Click the **Reject Idea** button. The window will close and the Display Idea page will refresh to show the details of the idea in read-only mode.

Note: When an idea is rejected, an informational email is sent to the creator of the idea. Before a rejected idea can be edited, it must be reopened.

Charters/Proposals

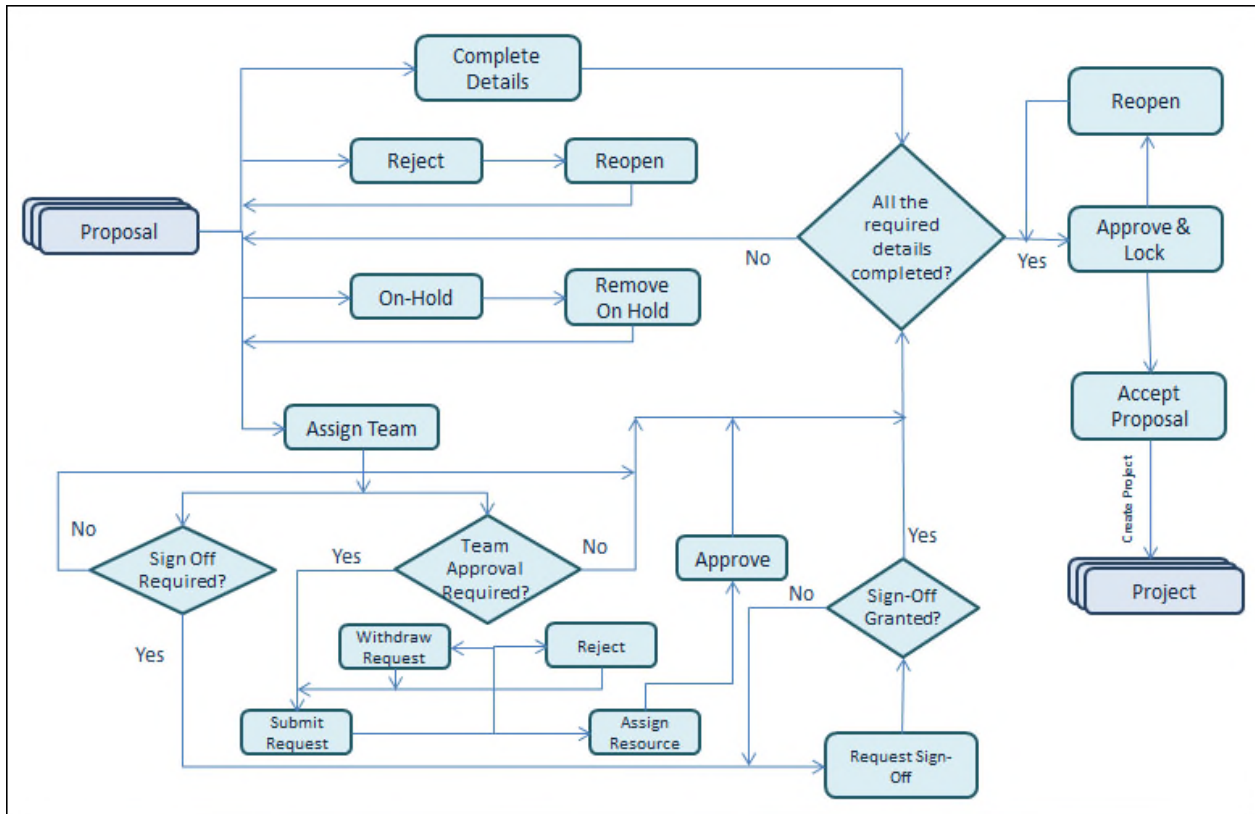
In This Section

Working with Charters/Proposals	56
Searching for Proposals	57
Creating a Proposal for a Project.....	57
Working with the Statement Generator Wizard.....	60
Editing a Proposal	61
Associating a Proposal to a Program.....	61
Working with Proposal Finances	62
Copying a Proposal	63
Working with Team Signoffs	63
Approving a Proposal	64
Rejecting a Proposal	64
Re-opening a Proposal.....	65
Creating a Project from a Charter/Proposal	65
Putting a Proposal on Hold.....	65

Working with Charters/Proposals

Charters or Proposals are an optional step in the path to creating a new project. Depending on the configuration of your system, you may see it displayed as either Charter or Proposal in the User Interface. New proposals can be created using the Proposal section of the UI or they can be created from an approved idea. Once created, a project proposal goes through a predetermined workflow before a final project is created from the proposal.


Proposal Workflow




Note: A project created using the Create Quick Project button on the Projects page would bypass the above workflow and would launch the project directly.

Viewing Proposals

- 1) To view a list of all existing proposal, click the **Proposals** link in the left Navigation bar, or select **Go To > Proposals** from the Top Navigation bar.
- 2) On the Proposals page, you will see a list of all the proposals in the system. Among other things, the list displays the date on which the proposal was submitted, the status of the proposal and the next action to be taken on that proposal.

- 3) In installations with multiple initiatives on the same system, you may be able to choose to filter the list of proposals by initiative. This will depend on your access permissions. Select the initiatives you want to view and click the **Go** button.
- 4) You can view the filters that are currently in effect by clicking the  button next to the **Display Current Filters** field.
- 5) To view the details of a particular proposal, locate it in the list and click on the **Project Name**.
- 6) From the Proposal Details page you can reject, edit or copy a proposal.

Note: On the Proposal details page, click on this  icon to view the current state of the proposal in the overall proposal workflow. The next possible states are also highlighted.

Searching for Proposals

EnterpriseTrack allows you to specify multiple selection criteria for proposals that are displayed on the **Proposals** page. This allows you to find other proposals that are relevant to your own proposal so that you can benefit from them. It also allows you to locate the team members in other similar proposals.

In installations with multiple initiatives on the same system, you may be able to search for proposals by initiative. This will depend on whether initiative sand-boxing has been enabled in your system and whether you are associated with more than one initiative.

You can also use the Quick Search to enter a keyword and view a list of all proposals that match that keyword. Keywords can be matched to several fields (like Proposal name, Functional area, Notes, Tasks, Documents etc.)

EnterpriseTrack also allows you to save specific search criteria to a personalized list of searches. To view a list of proposals based on a saved search, select from the **Saved Search** pull down menu. Pre-defined searches are created when your system is configured.

For detailed instructions see topic **Advanced Search and Saved Searches** (on page 20).

Creating a Proposal for a Project

To create a proposal:

- 1) Click the **Proposals** link in the left navigation bar, or select **Go To > Proposals** from the top navigation bar.
- 2) Click the **Create** button.
- 3) Enter all the required fields highlighted in red. You must complete the fields highlighted in orange and marked by ~ before the proposal is approved.
- 4) Click **Save**.

Basic Details, Classification, and Organization Hierarchy

- 1) Enter a name for this proposal.



- 2) Select an initiative. The fields and options you see may differ based on the initiative you selected.
- 3) Select the type of calendar you want to use. This field displays only if your administrator has enabled changing the default calendar.
- 4) Select a finance template from the drop-down menu.
- 5) Select the **Enable Versioning** check box to keep track of all the versions of this proposal.
- 6) Select the appropriate classification entries for your new proposal.
- 7) Select your organizational hierarchy.
- 8) Select a Project Type and a Roadmap for this project. Project types are used to categorize projects for reporting. The roadmap options you see are based on the project type you selected.
- 9) Enter a name for the primary metric and choose a primary metric type. These fields are displayed only if this feature was enabled by your administrator. If these fields are required, they are displayed in orange and must be filled to promote a proposal to a project. If they are optional, they are displayed in gray.

Choosing Initial Project Team Members

The roles and the list of available team members are determined by the initiative you selected. You can assign multiple team members to the same project role. You can also check the availability of team members before assigning them to your project by selecting the **Check Availability** button.

- 1) For each project role, select a team member. You can use the **Filter** button to find a team member.
- 2) Enter the duration for which you require this team member. Choose **Entire Project** or **Specify Dates**.
- 3) If you selected **Specify Dates**, then enter the start and end dates.
- 4) Enter the effort.
 - ▶ Select **Percentage Utilization** and enter the percentage of a resource's time that will be spent on this project.
 - Or*
 - ▶ Enter the total number of hours this resource will spend on the project.
- 5) From the **Actions** column, select **Submit for Sign-offs**.

Managing the Initial Project Team Members

- ▶ To delete a role, click the  **Delete** button.
- ▶ To edit a role, click the  **Edit** button.
- ▶ To add a new role, click the **Add Role** button.
- ▶ To copy users from the Proposal team to the project team, select **Auto-Fill**.

Note: If your system has been configured to use multiple currencies, you must choose the currency you want to use for this project. The system will then display all financial information in the selected currency.

Custom Fields

If your administrator has created custom fields for Proposals, you can enter the relevant information in these fields. If your administrator has configured a tool tip, you can mouse over the **Information** icon to view the help text.

Note: Finance custom fields are displayed on the **Settings** tab.

Statement and Notes

The **Statements and Notes** section allows you to enter detailed notes to help with reporting and evaluation. Some of the fields displayed may be dependent on the initiative selected for this proposal. If the proposal was created by approving an idea, some elements of idea description are automatically populated on the proposal page. Oracle recommends that you click on the **Proposal Fields Help** link to read your company's guidelines regarding completing the statements and notes section of the proposal.

Financials

Enter the expected savings and costs forecast for the project. Use non-negative numbers in these fields. For more information, see topic *Working with Proposal Finances*.

Dates and Durations

- 1) Select if you want to use the **Planned Project Start Date** or the **Planned Project Close Date** as the basis for initial calculations. Based on the selection you make here, either the Planned Project Start Date or the Planned Project Close Date is calculated. These dates are computed based on the duration of each stage or phase configured in the roadmap you selected.
- 2) Enter the dates.
 - a. Enter the **Planned Project Start Date** if you selected the Planned Project Start Date as the basis for initial calculations. This is just a planning number and can be set in the future. You can type in the appropriate dates or click the **Calendar** icon to select the dates.
OR
 - b. Enter the **Planned Project Close Date** if you selected the Planned Project Close Date as the basis for initial calculations. This is the date by which you expect to complete all the phases of your project. You can type in the appropriate dates or click the **Calendar** icon to select the dates.
- 3) You can modify the duration (in days) of each phase. The initial duration of each phase is based on the selected roadmap. The due date of each phase is set according to information entered here. Once these due dates have been set, the system will automatically color code the phase details based on how close the current date is to the phase due date. Warning emails are also sent out when phase due dates are close.

- 4) The system will suggest the Calculated Planned Project Start Date or the Calculated Planned Project Close Date (This may also be called the **Calculated Planned Realization Date**.) based on the estimated phase durations. Click the **Apply** link to use this date. You can also enter a **Planned Realization Date**.

Notes:

- Realization stages are not included in calculations.
 - For more information on using fractional duration and effort, see topic Using Fractional Duration.
-

Evaluations

- 1) Enter a score for each evaluation category. Oracle recommends that you use the evaluation **Help** as a guideline for creating scores for each category.
- 2) Enter comments regarding your evaluation of this proposal.

Documents and Links

Documents

Documents can be attached to the proposal by clicking the **Add Doc** link. For more information, see topic **Attaching Document Files** (on page 22).

Linked Projects

All the projects that are linked to this proposal can be seen in this section.

- 1) To link a project, click the **Add New** button.
- 2) On the Add New Project Link page, select the type of link.
- 3) From the **Available Projects** list, select a project and click the right arrow button to add it to the Associated Projects box.
- 4) Click the **Update**.

Settings

From this tab you can select the confidentiality settings, set proposal finance settings, and set finance custom fields.

If the proposal is set as confidential, it will be visible only to the proposal team members. You can further refine the confidentiality by making it available to members of particular organizational units and/or users with particular titles.


Working with the Statement Generator Wizard

EnterpriseTrack can help you to create a well articulated problem or objective statement. In the **Statements and Notes** section of a proposal or project, certain fields may appear with the **Wizard** link next to them.

- 1) Click the Wizard link to launch the statement generator wizard.
- 2) Type your answer to each question posed by the wizard in the appropriate field. Be as specific as you can and let the sample answer guide you as you type.

- 3) Scroll to the bottom of the page. The top field e.g. **Generated Opportunity or Problem Statement field** will display the statement.
- 4) Click the **Copy** button to copy it to the bottom field for editing.
- 5) To use the statement, click the **Apply** button.

Editing a Proposal


- 1) To edit a proposal, click on the **Proposals** link in the Left Navigation bar, or select **Go To > Proposals** from the Top Navigation bar.
- 2) Locate the proposal you wish to edit and click on the  icon and select **Edit**.
- 3) Make the required changes. Oracle recommends that you use the guidelines that can be accessed by clicking the **Proposal Fields Help** link while entering information into the various fields. For details on each subsection, you can also refer to the proposal details section in the online help.
- 4) Click **Save** to save your changes.

Using Quick Edit

You can also quickly edit a proposal from the main *Proposals* page.

- 1) From the **Proposals** page, click on the  icon next to the Proposal and select **Quick Edit**.
- 2) Make changes on the grid and click the **Save** button.

You can also quickly add documents, link projects, update evaluation scores, strategy or process from main *Proposals* page.

- 1) From the **Proposals** page, click on the  icon next to the Proposal and select **Create > Documents, Linked Projects, Strategy, Scorecard, or Process**.
- 2) Make the necessary changes click the **Save** button.

Editing Proposal Sign-offs

EnterpriseTrack allows you to build in specific sign-off requirements for proposals. If a proposal has sign-offs that are required, users will not be able to create a project for that proposal until all the required sign-offs have been acquired.




Based on permissions, users can edit the sign-off requirements by clicking the **Edit Team Sign-Offs** button on the **Proposal Details** page.

Deleting a Proposal

If you have the appropriate permissions, you will be able to delete a proposal. Click the **Delete** button on the **Proposal Details** page. If a project has already been created from the proposal, you will have to delete the project before you delete the proposal.

Associating a Proposal to a Program

To associate a proposal to a program:

- 1) From the **Proposal** listing page, select a proposal.
- 2) From the Proposal Details page, select the **Edit**  icon next to the Associated Programs section.
- 3) Select a program you want to associate with this proposal. To clear the program, delete the program name. You can use the **Filter**  icon to narrow your search.
- 4) Click **Add Program** to associate this proposal with additional programs. A new row is inserted.
- 5) Select additional programs. To clear a program row, click the **Trash**  icon.
- 6) Click **Save**.

Note: You must have the required permissions to associate a proposal to a program. You can associate a proposal to multiple programs only if the feature has been enabled by your administrator.

Working with Proposal Finances


Proposal level finances are entered using the **Finances** tab on the **Project Request** page. If proposal finances are disabled at the finance template level, only initial project finance values can be entered. These initial finance values are displayed on the Project Basics page as Budget. For proposals that have proposal level finances enabled, an expanded finance table is displayed. You can enter the current Plan values for each finance category and subcategory. Team categories roll up from initial project team allocations and approvals. If allocations are enabled, allocation efforts (whether approval is required or not) are rolled up into the element and cannot be manually entered at the team member level. If allocations are disabled, the team finance effort elements are editable at the team member level. The proposals data is copied to the project on project create and a snapshot called budget is created.

Before you can begin entering finances, ensure that you have set the **Planned Project Start Date** from the **Dates and Duration** tab.

Notes:

- If a global finance lock is set, you cannot edit proposal finances or override a global finance lock.
 - You cannot take snapshots of proposals.
 - Categories that are configured to roll up from activities or timesheets do not show on the proposal finances.
 - The elements under categories whose type is Activity Resource Cost, Non-Resource Cost, Capex, or Opex are not shown on proposals finances.
 - If your administrator has modified the finance template to enable detailed Plan finances, then the existing proposal finance data will be deleted, but the finance summary entered on the Proposal Basics page is retained until the finances are edited.
-

To edit or enter finance data:

- 1) To edit a proposal, click on the **Proposals** link in the Left Navigation bar, or select **Go To > Proposals** from the Top Navigation bar.
- 2) Locate the proposal you want to edit. From the  icon, select **Edit**.
- 3) For projects that have proposal level finances disabled:
 - a. Enter values for initial finance fields.
 - b. Click **Save**.
- 4) For projects that have proposal level finances enabled :
 - a. To enter finances for a particular category for all months, select a financial category from the **Edit Finances for Category** pull-down menu. You will be able to enter data for each sub-category within that category, for all the months.
 - b. To enter finances for all categories and sub-categories for a particular month: select the month from the **Edit Finances for Month** pull-down menu.
 - c. Click **Save**.

Copying a Proposal

Companies may have multiple proposals that are similar to each other within the EnterpriseTrack system. If you have to create a new project that is very similar to an existing EnterpriseTrack proposal, you can choose to copy a proposal instead of creating a new one.

- 1) Click on the **Proposal** link in the left navigation bar, or select **Go To > Proposals** from the Top Navigation bar and locate the proposal you wish to copy.
- 2) Click on the name of the proposal to view the proposal details.
- 3) Click the **Copy** button.
- 4) The page will refresh and a new proposal with "copy X" appended to the proposal name will be displayed.
- 5) Click **Edit** in the **Basic Details** section and give your proposal a new name.

Note: Oracle recommends that you rename copied proposals immediately to ensure that each proposal in the system has a meaningful name.

Working with Team Signoffs

EnterpriseTrack allows you to build in specific sign-off requirements for proposals. If a proposal has sign-offs that are required, users will not be able to create a project for that proposal until all the required sign-offs have been acquired.

Requesting a Sign Off

To request a sign off from a team member:

- 1) Navigate to the Proposal Details page.
- 2) From the **Workflow** drop-down menu, select **Request Team Signoffs**.
- 3) Select the appropriate check boxes and click the **Save** button. An email is sent to each member and a sign off request item is delivered to their **My Work** page.

Note: You can view the status of the sign-offs for a proposal by clicking the **Edit Team Sign Off Status** tab on the **Manage Team Signoffs** page.

Approving/Rejecting a Team Signoff

- 1) Navigate to the Proposal Details page.
- 2) From the **Workflow** drop-down menu, select **Team Signoffs**.
- 3) Select the **Edit Team Signoff Status** tab.
- 4) From the **Signoff Status** drop-down menu, select from one of the following options: **Signoff Granted**, **Conditional Signoff Granted**, or **Signoff Denied**. If you select Conditional Signoff Granted, you can enter your conditions in the Comments box. The next level approver can then decide to either reject or allow the proposal to proceed.
- 5) Click **Save**.

Approving a Proposal

A project proposal may be approved after all the required fields have been entered.

- 1) To approve a proposal, locate the appropriate proposal on the **Proposals** page.
- 2) Click on the name of the project to view the proposal details.
- 3) Click the **Approve & Lock** button.
If your system is configured to have a one-step workflow, you can click the **Accept Proposal and Create Project** from the Workflow pull-down menu.
- 4) Enter the **Actual Start Date** and the **Planned Project Close Date**.
- 5) Click the **Accept Proposal and Create Project** button.

Note: In the case of the two-step approval process, when a proposal is approved, it is locked. The **Accept Proposal and Create Project** button can then be clicked to create a project. Projects can be created from locked proposals, but the proposal details cannot be modified. A proposal can be re-opened for modification. Re-opened proposals must fulfill all sign-off and approval requirements before a project can be created for that proposal.

Rejecting a Proposal

A project proposal may be rejected at any stage before the project is created.

- 1) To reject a proposal, locate the appropriate proposal on the **Proposals** page.
- 2) Click on the name of the project to view the proposal details.
- 3) Click the **Reject proposal** button.

Note: When a proposal is rejected, an email is sent to the user who created the proposal. Rejected proposals cannot be approved, but can be copied. Once it is copied and a new proposal is created it can be

edited.

Re-opening a Proposal

When a proposal is approved, it is locked to prevent users from making changes to an approved proposal. Locked proposals can be re-opened by users with the appropriate permissions.

To re-open a proposal:

- 1) Navigate to the **Proposals** page.
- 2) Click on the proposal to be re-opened
- 3) Based on your permissions, you will see the option to reopen a proposal. From the **Proposal Details** page, select **Reopen** from the Workflow menu.

Note: Once a proposal is re-opened it must go through the sign-off and approval process before a project can be created for that proposal.

Creating a Project from a Charter/Proposal

Once a proposal is approved, a project can be created from the proposal. An approved proposal will have an **Accept Proposal & Create Project** button on the **Proposal Details** page. Click the **Accept Proposal & Create Project** button on this page to create a project.

When a project is created from a proposal, the proposal is removed from the **Proposals** page and an active project is added to the list of projects displayed on the **Projects** page. The following actions are carried out by the system within the context of that particular project:

- 1) The project's phases, tasks and deliverables are setup based on the project type and roadmap selected when the proposal was created. Phase due dates and tool template associations with tasks/deliverables are also setup based on the chosen roadmap.
- 2) The first phase of the roadmap is made the current phase of the project.
- 3) The initial team is pre-populated from the proposal and each team member is notified about the creation of the project.
- 4) The primary metric is setup based on your selection in the proposal.
- 5) All financial categories and sub-categories are setup and initialized to zero.
- 6) The multiplication factors for each financial category (if appropriate) are setup.
- 7) All the appropriate custom fields are set up.

Putting a Proposal on Hold

To place a proposal on hold:

- 1) Click on the **Proposals** link in the left navigation bar and, or select **Go To > Proposals** from the Top Navigation bar and select the proposal.
- 2) Click the **Workflow > Hold** button on the Proposal details page.

To remove the hold:

- ▶ From the Proposal Details page select **Workflow > Remove Hold** to and make the proposal available again.

Notes:

- **On Hold** in the Status column of the Proposal List indicates that a proposal has been placed on hold.
 - If you are unable to place a proposal On Hold, you may not have the necessary permissions. Contact your administrator for details.
-

Projects

In This Section

Working with Projects.....	67
Creating a Quick Project.....	69
Searching for Projects.....	70
Using Project Quick Search.....	71
Text Search within Projects.....	71
Using the Project Module Menu.....	71
Selecting the Activity Display Mode.....	72
Using the Project Listing Page.....	72
Using Control Buttons.....	72
Using the Group by Functionality.....	74
Using the Pivot Functionality.....	74
Working with Organizations.....	75
Copying a Project.....	75
Putting a Project on Hold.....	76
Re-opening Projects.....	76
Exporting a Project.....	76
Deleting a Project.....	77
Working with Project Basics.....	77
Working with Project Dates.....	79
Working with Project Roadmaps and Tasks.....	81
Working with Generic (Non-WBS) Activities.....	104
Working with Project Documents.....	105
Working with Project Financial Data.....	107
Importing and Exporting Project Information.....	114
Associating Programs.....	119
Working with Project Issues.....	120
Working with Project Risks.....	122
Working with Project Metrics.....	125
Working with Project Statements and Notes.....	128
Working with Project Reports.....	130
Working with Status Reports.....	132
Working with Project Resources.....	134
Working with Project Settings.....	141




Working with Projects


Once a proposal is approved, a project can be created. A newly created project is set to have a status of **Active**. The project manager or other authorized users can assign tasks and deliverables for the various phases of that project. In the case of a Six Sigma project, the Master Black Belt or Champion typically controls when the project phase is advanced (E.g. Advanced from a "Define" to a "Measure" phase in a DMAIC project).


Users complete tasks, download templates and upload completed tools, add notes, resolve issues and perform other activities that all contribute to the conclusion of each phase. Once all the phases are completed, the project is closed. A closed project is considered to move into a realization period where the majority of costs and savings are incurred, and tracked. After the period of realization, a project is considered completed.


Project Status


The current status of a project is indicated using various icons in the **Project Status** column on the **Project List** page.


Active projects are displayed with a  (1-Red),  (2-Yellow) or  (3-Green) icons. Place your mouse over the icon to read the mouse-over text.


 - Project is active and it is past due. This icon is displayed when the Project Planned Close Date is less than today's date.

 - Project is active and is due on mm/dd/yy. This icon is displayed when the Project Planned Close Date is within 7 days. (Seven days is the default - this number is configurable for each initiative. Alerts are raised based on this number)

 - Project is active and is on schedule. This icon is displayed when the Project Planned Close Date is more than 7 days away. (Seven days is the default - this number is configurable for each initiative)

 indicates that the project is on hold.

 indicates that the project has been closed and is in realization.

 indicates that the project is past its realization stage and is completed.


 indicates that the project has been canceled.


Notes:


- Projects can be put on hold and can be made active again.
 - Projects that are canceled cannot be made active.
 - Once a project is closed (i.e., in realization), it cannot be canceled or put on hold.
-

Phase Status

The current phase for the project is displayed in the **Phase** column. The indicator icons follow the same scheme as those described above.

 - Phase is active and it is past due. This icon is displayed when the Phase end date is less than today's date.

 - Phase is active and is due on mm/dd/yy. This icon is displayed when the date on which the phase is supposed to end is within 7 days. (Seven days is the default - this number is configurable for each initiative. Alerts are raised based on this number)

 - Phase is active and is on schedule. This icon is displayed when the Phase end date is more than 7 days away. (Seven days is the default - this number is configurable for each initiative)

Creating a Quick Project

Creating a quick project allows you to create a project without first creating a proposal. It lets you bypass all the steps that are required during proposal creation. You do not require a proposal, approval for resources, request for sign-offs, or have initial finances set up.

To create a quick project:

- 1) Click the **Projects** link in the left Navigation bar.
- 2) On the **Projects** page, click the **Create** button.
- 3) On the **Create Quick Project** page, you will see the basic set of information that is required to create a project.
- 4) Once all the required fields have been filled, click **Save** to create the project. Each sub-section is dealt with in detail below:

Basic Details

- 1) Enter a name for the project.
- 2) In installations with multiple initiatives on the same system, you must first choose the initiative to which this project belongs. If you are part of more than one initiative, you will be able to choose team members only after you select an initiative. Depending upon the initiative you choose, the following fields may also vary: Initial Team Members, Roadmaps, Project and Metric types.
- 3) Select the type of calendar you want to use. This field displays only if your Administrator has enabled changing the default calendar.

Organization

Choose the appropriate organizational unit for the new project.

If a specific hierarchy is being enforced within your system the system will refresh the screen to make sure that only relevant choices are displayed in the pull-down menus.

Note: You can also associate multiple organizations with a project, if configured by your administrator.

Dates

- 1) Select the **Actual Start Date**. This date will be pre-populated to be today's date, and cannot be in the future. For both date fields, you can select from the pull-down menu or use the calendar.
- 2) Select the **Planned Realization Date**. This is the date by which you expect to complete all the phases of a project. E.g. in a DMAIC project, it would be the date when all tasks and deliverables are completed for the last Control phase, and the project is ready to go into the Realization period.

The initial planned realization date affects the following:

- 1) The red/yellow/green color coding of projects which is displayed on **My Work** and **Projects** pages. This also controls the escalation mails that are sent out.

- 2) The financial start date - as pre-populated by the system. However, the financial start date can be changed at any time by users with the appropriate permissions.

Notes:

- Phase due dates are based on the roadmap chosen for a project and are determined by the configured default phase durations for that roadmap.
 - For more information on using fractional duration/effort, see topic [Using Fractional Duration](#).
-

Roadmap and Metric types

- 1) Select a Project Type and a Road map for this project. The project type options will vary based on the initiative you choose. The roadmap options available to you will also vary depending upon the project type you choose. Project types are used for categorizing the project and reporting. A Roadmap defines a list of unique sets of phases, tasks and deliverables.
- 2) You can also enter a name for the primary metric and choose a primary metric type.

Initial Team Members

Select the initial team members for this project. The available team members are determined by the initiative you choose and by the roles the users are allowed to fulfill within the system

Custom fields

Enter the custom fields for projects. If your administrator has configured a tool tip, you can mouse over the **Information** icon to view the help text. If there are no custom fields for projects defined in your system, this section will not appear in the User Interface.

Searching for Projects

EnterpriseTrack allows you to specify multiple selection criteria for projects that are displayed on the Projects page. This allows you to find other projects that are relevant to your own project so that you can benefit from them. It also allows you to locate the team members in other similar projects. You can then use the contact list to contact the appropriate people.

In installations with multiple initiatives on the same system, you may be able to search for projects by initiative. This will depend on whether initiative sand-boxing has been enabled in your system and whether you are associated with more than one initiative.


You can also use the Quick Search to enter a keyword and view a list of all projects that match that keyword. Keywords can be matched to several fields like Project name, Functional area, Notes, Tasks, Documents etc. These fields are defined in the **Adjust Search for Projects** page.

EnterpriseTrack also allows you to save specific search criteria to a personalized list of searches. To view a list of projects based on a saved search, select from the **Saved Search** pull down menu. Pre-defined searches are created when your system is configured.

For detailed instructions see topic **Advanced Search and Saved Searches** (on page 20).

Using Project Quick Search

You can quickly search for projects using the project type ahead text box on the right side of the Top Navigation bar.

In the text box that says 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. You can click on the project you want or, click on the arrow icon  next to the text box to navigate to that project.

The search results are displayed as a list and organized by initiative.

Note: When you navigate to a project from anywhere, the Default Landing Page of the project is displayed. This page is configured on a per-Role basis by your Administrator.

Text Search within Projects

You can perform text searches from the Advanced Search screen or use the **Search (within listed projects)** box on the Project Listing page. The system searches through all relevant entries, including documents to display the search results. For example, to search for a project with the word Test, type the word **Test** in the Search (within listed projects) box. The system searches through the Project Listing page and displays projects with the word Test in it.

Using the Project Module Menu

The Project Module Menu provides the same navigation capability of the Left Navigation Bar. It provides easy access to many of the actions you can perform on a project. The Project Module Menu is the right-most menu on the Top Navigation Bar when you are in a project.

Go To menu: You can navigate to various pages: the project basics, dates, project plan, documents and finances, issues, linked projects, sample templates, notes, reports, settings, alignment, resources, change requests, discussions, risks, QA plan, and the associated pre-project.

Create menu: You can create various objects associated with a project. You can create documents, issues, linked projects, metrics, notes, status reports, team members, finance snapshots, strategy, and portfolios.

Edit menu: You can edit the various objects associated with a project. You can edit the basic details, classification, organization, confidentiality, project justification, start dates, project dates, shift plan dates, initial finances/currency, finance settings, keywords and custom fields.

Delete Project: Delete the current project.

Copy Project: Copy the current project.

Send Email: You can send email to team members.

WorkFlow menu: You can delete, copy, cancel or hold projects.

Selecting the Activity Display Mode

When you are working on an activity you can choose how you want to view the activity details. You can choose to view it within the main page, or as split page or on a separate pop-up window. From the **View** menu select **Activity Display Mode** and select **Main Page**, **Split Page**, or **Popup Page**.

Note: Oracle recommends you select the Popup Page option.

Using the Project Listing Page

The Project Listing page shows a list of projects that are returned from a default saved search. The projects are listed based on the initiative they belong to and if a large number of projects are returned then the projects are displayed in multiple pages.






To view the Project Listing page, from the Top Navigation bar select **Go To > Projects**, or select **Projects** from the Left Navigation bar. For more information on changing the returned search, see topic **Advanced Search and Saved Searches** (on page 20). For more information on personalizing your listing page, see topic **Personalizing the Listing Pages** (on page 21).




















Note: If you are associated with multiple initiatives, an error message is displayed if Group By or Pivot functionality is enabled on one or more initiatives. To view project listing for more than one initiative, ensure that the Group By and Pivot functionality is disabled on all initiatives.

Using Control Buttons

The following table lists the control buttons displayed on the Project Listing page and the Project Roadmap, and non-WBS activity pages. You can view or hide the 4 toolbars (Print-Data, Editing, Views, and Row-Action Menu). From the **View** menu, select **Toolbars** and select or deselect the checkbox associated with each toolbar.

Note: You can also use the View and Data menus to perform all the actions described below.

Control Buttons	Description
	Expand the tree.
	Close (or collapse) all the activities.
	Add a child node (E.g. task)
	Add a peer node (E.g. Tollgate)
	Select from a sub-menu.


	Edit selected activity.
	Delete selected activity.
	Copy selected node. Leaf nodes can be copied. If the button is not enabled, make sure you can see the properties of the leaf node (e.g. Task, not Gate) in the properties pane.
	Cut selected node.
	Paste selected node.
	Paste Special.
	Copy dates to Baseline.
	Copy dates from Plan.
	View documents and tools associated with the roadmap.
	Edit all activities on the Roadmap page.
	Load your settings. Click on the selector button to choose from the options.
	Save settings. Click on the selector button to choose from the options.
	Reset settings. Click on the selector button to choose from the options.
	Print Roadmap grid. Pop ups must be disabled.
	Export roadmap grid to a CSV file.
	Personalize roadmap grid. You can choose the columns you want displayed on the Roadmaps page.
	Turn on/off the filter row.
	Turn on/off the group by column functionality. If enabled, you can customize the projects page to show project summary based on your filter criteria.
	Turn on/off the pivot functionality. If enabled, you can generate custom pivot tables from the project list page.

Using the Group by Functionality

The Group By functionality allows you to group projects by selected columns. This functionality allows you to group projects, for example by project status, stage/phase, organization etc. You can also use multiple grouping criteria to group projects by primary and secondary criteria, for example you can group projects by On-time Status and Organization.

Note: Clicking the **Group by** button within the context of an initiative brings up projects only pertaining to that initiative.

To enable the group by functionality:

- 1) Navigate to the *Projects* page by clicking the **Projects** link on the left navigation bar, or by selecting **Go To > Projects** from the top navigation bar.
- 2) From the *Projects* page, click the  button, or from the **Data** menu, select **Group By**. By default the screen loads with the Group By icon disabled and the Group By Option set to None.
The Grouping row is displayed just below the header row. The Group By columns are displayed under the first column.
- 3) From the drop-down menu, select a column for grouping. Projects are grouped based on your selection. If you select **None**, all qualifying projects are displayed ungrouped. Typically text fields are enabled for grouping and numeric fields are summed for each group used for grouping. Certain fields like Project ID and Project Name, which are unique fields, are not eligible for grouping column selection.
- 4) To filter based on multiple criteria, select a project column name and drag it next to your first filter criteria. The Group by drop-down value automatically changes to Custom, and the projects are displayed based on the multiple grouping columns. To remove a column from the grouping criteria, select and drag the column away.


Using the Pivot Functionality

You can use the Pivot functionality to summarize project data using grouping fields. This functionality allows you to select project fields for rows and columns, and a project field to compute Sum or Count operations for the data cells in the pivot table. If the field selected for summarizing (Data field) is numeric, then Sum and Count operations are allowed. If the Data field is text, then only Count operation is allowed. For example, you can view the Project Stages in rows, Project Leaders in columns and display the sum of the Current Forecast field for each project stage/project leader combination.

Note: Clicking the **Pivot** button within the context of an initiative brings up projects pertaining only to that initiative.

To create pivot tables:

- 1) Navigate to the *Projects* page by clicking the **Projects** link on the left navigation bar, or by selecting **Go To > Projects** from the top navigation bar.

- 2) From the *Projects* page, click the  button, or from the **Data** menu, select **Pivot**. The table options are displayed above the project fields.
- 3) Select the rows, columns, and data for your pivot table by dragging and dropping project column field names. To remove a field, select the column field name and drag away. The Operation field displays Sum if the data field is numeric and Count if the data field is text or numeric.
- 4) Click the **Display Pivot Table** button. The pivot table results are displayed in a new window.

Working with Organizations

When you create a project, you select the primary organization that is associated with that project. You can view the details of the organization in the **Basics** section of a particular project.

Once a project has been created, you can add multiple secondary organizations to that project. Doing so will allow you to allocate the financial data to multiple organizations.

To add additional organizations to a project

- 1) Navigate to the **Basics** page by clicking the **Basics** link on the left navigation bar within a particular project, or from the Project Module Menu (**Project #**) select **Go To > Basics**.
- 2) Click the **Edit** button in the Organizations section of the **Project Basics** page.
- 3) The primary organization is displayed in the top row. You can modify this by selecting other options from the pull-down menu.
- 4) Click the **Add More** link to add organizations.
- 5) Select the organizations from the pull-down menus.
- 6) You must specify the percent allocation for each organization. The percent allocation is applicable only for finances and affects the financial roll-ups for projects.
- 7) Click the **Update**.

Copying a Project

Companies may have multiple projects that are similar to each other within the EnterpriseTrack system. If you have to create a new project that is very similar to an existing EnterpriseTrack project, you can choose to copy a project instead of creating the new project from scratch.

- 1) Click on the **Projects** link in the Left Navigation Bar, or from the **Go To** menu select **Projects**.
- 2) Locate the project you wish to copy.
- 3) Click on the name of the project to view the project basics.
- 4) From the Project Module Menu (Project#) on the Top Navigation Bar select **Copy Project**.
- 5) On the **Project Copy Options** page, enter the name of the new project and enter a start date for the project.
- 6) Use the check boxes to select all the elements of the project you wish to copy. By default the system will copy certain core information like the org hierarchy, classification, statements and notes, roadmap with all the deliverables and tasks, the team members, the primary metric etc.


- 7) Click the **Copy Project** button to create your new project.
- 8) Click **Cancel** to leave the page without copying the project.

Putting a Project on Hold

To place a project On Hold:

- 1) Click on the **Projects** link in the Left Navigation Bar, or from the Top Navigation Bar select **Go To > Projects**.
- 2) Locate the project and click on the name of the project to view the project basics.
- 3) Click the **Edit** button in the **Basic Details** section of the **Project Basics** page, or from the Project Module Menu (Project #) on the Top Navigation Bar select **Project # > WorkFlow > Hold Project**.
- 4) Locate the **Status** field and select the radio button next to **On Hold**.
- 5) You can enter a comment in the **Comments for Status Change** field.
- 6) Click the **Update** button to save your changes.

Notes:

-  icon in the Status column of the Project List indicates that a project has been placed On Hold.
 - The dates on which a project was On Hold can be viewed by clicking the **Dates** link in the left navigation bar for a particular project.
 - If you are unable to place a project On Hold, you may not have the necessary permissions. Contact your administrator for details.
-

Re-opening Projects

Based on permissions, closed projects and completed projects can be re-opened. To re-open a project, do the following:


- 1) Navigate to the **Projects** page by selecting **Go To > Projects** from the Top Navigation Bar.
- 2) Click on the project to be re-opened.
- 3) Based on your permissions, you will see an **Activate Project** option under the WorkFlow menu on the Project Basics page.
- 4) From the Basic Details page, change the Status to **Active**.
- 5) Click the **Save** button to re-open the project.

Note: When a project is re-opened, an informational email is sent out.

Exporting a Project

You can export a project's list and the columns as a CSV (comma separated values) file to use in other applications.

To export a project

- 1) From the Projects page, click the **Export to CSV**  button. The File Download dialog box appears.
- 2) Click **Save** to save the project file or click **Open** to open the project file.

Deleting a Project

To delete a project:

- 1) Click on the **Projects** link in the left navigation bar, or select **Go To > Projects** from the Top Navigation Bar.
- 2) Click on the name of the project to view the project basics, or from the Project Module Menu (**Project #**) select **Delete Project**.
- 3) Select if you want to delete the project proposal and the Project Request.
- 4) Click **Delete Project** to delete a project
- 5) If you have the appropriate permissions, you can click the **Delete** button to delete the project

Note: You cannot delete a project if there are open tasks and deliverables that are open.

Working with Project Basics

The **Project Basics** page provides an overview of all general project information. You can view and edit this page only if you have the appropriate permissions.

Basic project information

- ▶ Project Name - name of the project. This field can be edited.
- ▶ Project ID - The internal tracking number for the project.
- ▶ Calendar - A calendar for this project. You can choose a calendar that is specific to your organization, country, or company. For example, depending on your project needs and the calendars set up by your Administrator, you can choose 8x5 (Monday to Friday) calendar, or 7x6 (Monday to Saturday) calendar, or 8x5 (Sunday to Thursday) calendar. The calendar choices are determined by your Administrator. The calendar is used by the system to determine the Plan Start and Completion Dates for activities.
- ▶ Phase - The current phase of the project.
- ▶ Status - Current status. This field can be updated. When you change the status of a project you can add a comment.
- ▶ Currency - Currency of financial data entry.
- ▶ Percentage Completed - The percentage of the project that has been completed at the present time. You can click on the **Recompute** button to update the percentage.
- ▶ Project Leader - Name of the project leaders.
- ▶ Proposal ID- Proposal from which this project was created
- ▶ Idea - Idea from which this project was created
- ▶ Send Email Notifications - Indicates whether email notifications are being sent about this project. This field can be edited.

- ▶ Finance Validation Template - The template to be used for financial validation - This menu is present only if financial validation is being used and if there are multiple validation templates for a given initiative.

Classification

Projects may be classified in a variety of ways, including Functional Area, Project Source and Process. These fields are set up during configuration and can vary by installation.

Organizational unit

Indicates the organizational unit within which this project is situated. This can be edited. If a specific hierarchy is being enforced within your system the page will refresh to update the values displayed in the pull-down menu to make sure that you do not violate the dependencies between the various units.

Confidentiality settings

Indicates whether the project is visible to all users of the system, or only to members of the project (i.e. confidential). If it is set to be confidential, it can be made available to members of specific organizational units and/or users with particular titles.

Statements and notes

Displays the detailed notes, carried over from the project proposal (if any), that help with reporting and evaluation. Some of the fields displayed may be dependent on the initiative selected for this project. All these fields can be edited.

Financial information

Displays the financials entered at the proposal level. If a project is created with single-view, the budget finances are editable. If the project is created with double-view, the budget finances will not be editable from the Basics page, even if proposal finances are not enabled.

Dates

Displays the dates associated with the project. You should be able to see the date on which the project was started and the planned realization date (the date by which you expect to complete all the phases of a project). The Project Manager Transfer Date is populated if the project manager was changed.

Linked Projects

Displays the projects that are linked to this project.

Associated Programs

Displays the Programs associated with this project. For more information, see topic **Associating Programs** (on page 119).

Alignment

Displays the alignments, path and % contribution.


Keywords

Keywords for this project can be defined in this section and can be used for filtering by keywords.

Custom fields

If there are project custom fields defined in your system, these will be displayed in the custom fields section.

Editing Fields

- 1) To edit any of the fields mentioned above, click the **Edit**  button next to the appropriate section.
- 2) Make the required changes.
- 3) Click **Update** to save your changes.
- 4) Click **Cancel** to exit without saving changes.

Working with Project Dates

When you create a project you select a **Project Start date** and a **Planned Project Close Date** (this may also be called **Project Planned Realization date**). Based on the settings chosen during configuration, the system sets up a financial tracking plan for the project using these dates. Phase Due dates are also set up based on the appropriate roadmap.

All the dates associated with a project can be managed from the **Project Dates** page. Within the context of a particular project, click the **Dates** link in the Left Navigation bar, or from the **Project Module #** select **Go To > Dates**.

Project Timeline

This section displays the time frame over which each phase has to be executed. You can view the initial/current planned timeline as well as the actual timeline. Place your cursor over each phase to see the start and end dates for that phase.

Planned vs. Actual Dates

This section shows you the Start and Close Dates for each of the projects. You can also view the Start and Close dates and the cycle time for each phase of the project.

Depending on where you are in the project cycle you will see some or all of the initial planned date (set up when the proposal was created), the current planned date and an actual date for the starting and closing of the project.

To change the Project and Phase related dates, click on **Edit Project Dates** button.

Finance Dates

Finance dates cannot be edited from this page. The lock month is managed by the administrator. If your system has been configured to have a 12-month finance window, the financial start date is managed by your project's finance administrator through the **Finance** tab. The validation dates are updated when a finance representative or finance administrator with appropriate permissions validates finance dates.

On Hold Dates

This section will display all the dates on which this project was placed on hold. On hold dates are significant from a reporting perspective since these days are not included in the cycle time calculations for projects. The dashboards also reflect data that takes on hold dates into account.

Shifting planned dates

The Shift planned dates button can be used to easily shift all your current planned dates based on whether you project is ahead of, or behind schedule. For example, if you project is one month ahead of schedule, all current plan dates, including the planned project close date can be pulled in by a month by clicking the **Shift Planned Dates** button. If your projects are behind schedule, the dates will be pushed out when you click this button.

Note: For more information on using fractional duration/efforts, see topic Using Fractional Duration.

In This Section

Changing the Start Date of a Project.....	80
Setting Phase Due Dates.....	81

Changing the Start Date of a Project


To change the Project Start date:

- 1) Navigate to the **Project Dates** page within a project by clicking on the **Dates** link in the Left Navigation Bar, or from the **Project Module Menu (Project #)** select **Go To > Dates**.
- 2) From the **Edit** menu select **Start Date**. In the **Planned Vs Actual Dates** section, make the appropriate changes. You will also have to tell the system how you want these changes to affect the financial tracking and due dates.
- 3) How should shifting the Start Date affect Financial Data?
 - ▶ Clear Financial Data for all the months - this will clear the financial data entered for all the months - all fields will be made blank.
 - ▶ Clear Financial Data for only the months that are no longer in the project - E.g. If you moved your project start date from July 1 to Sept 1, the system will delete the data for July and August.
 - ▶ Shift Financial data - E.g. If you moved your project start date from July 1 to Sept 1, the system will shift the financial data for July to September, for August to October and so on.
- 4) Should shifting the Start Date also shift Due Dates?
 - ▶ Select **Yes** or **No** as appropriate.
- 5) Click **Update** to save the changes.

Note: If you are unable to make changes to this page, make sure you have the required permission (Actual Project Start Can Differ from Planned Project Start). Contact your administrator for more information.

Setting Phase Due Dates

The phases of a particular project are determined by the roadmap chosen for the project. Each phase has a time duration and the due date for the phase is automatically set by the system. To change the due date of a phase:

- 1) Within a particular project, click the **Dates** link in the Left Navigation Bar, or from the **Project Module Menu (Project #)** select **Go To > Dates**.
- 2) From the **Edit** menu select **Project Dates**.
- 3) Locate the **Start Dates** and **Due/Completion Dates** within the Phase section. Make the necessary changes to the date. You can type in the dates or use the calendar. Place your cursor on the  next to the appropriate fields for additional information about other dates that may impact your phase due date. You can click on this image to populate the field with the date suggested by the system.
- 4) You may also need to modify the **Current planned Due/Closure Date** for the project since all phase due dates have to be before the project due date.
- 5) Click **Save** to save your changes.

Note: The due date of a phase cannot be later than the project's Planned Due/Closure Date (or Planned Project Close Date).

Working with Project Roadmaps and Tasks

In This Section

About Project Roadmaps and Tasks	82
Viewing Project Roadmaps	82
Icons on the Project Roadmap	83
About Roadmap Views	86
Modifying a Roadmap	87
Using the Gantt View.....	87
Completing Roadmap and Task Tool Templates	90
Group Edit of the Roadmap	90
Using Keyboard Shortcuts: Project Roadmap Page	91
Working with Project Activities.....	92
Managing Project Gates or Phases	103

About Project Roadmaps and Tasks

A project's roadmap or project plan is made up of one or more activities. Depending on how the project plan is setup, the roadmap may have phases and tasks under phases. Standardized project plans or roadmaps are created and managed by administrators. Only users with appropriate permissions can add new phases or tasks to a roadmap. If the administrator has configured the roadmap with the setting that does not allow any changes to the predefined activities, then users cannot make changes to the list of activities at the project level.

The properties pane, in the lower half of the page, displays additional information associated with each phase or task. The tabs displayed in the properties pane depend on how the selected activity is configured.

- ▶ **General Tab:** The General tab is the default tab which displays key information about the activity (e.g. Activity Name, Sequence Number and other fields). Depending on how the system has been configured not all available fields may be visible for all activities. In addition to predefined fields, administrators may setup custom fields which will be displayed on the general tab.
- ▶ **Dates Tab:** Displays Initial Plan, Current Plan and Actual Dates. Users with modify activity permission can update current plan and actual dates on this tab. Initial Plan Date can only be altered by users with Modify Initial Plan Date permission.
- ▶ **Finances Tab:** Displays the costs tracked for each activity. You can enter the Actual Effort performed by a resource on an activity. You can also view or edit the overtime and setup costs associated with an individual resource or an activity.
- ▶ **Resource Tab:** Resource tab displays the assigned resource(s) to the activity.
- ▶ **Approvals Tab:** If a user needs to approve an activity, it is displayed in this tab. Approvals for Tollgates are displayed in this tab. Users with the right permission can initiate approval requests. Approvers can then review the activity and other prerequisites and grant or deny approval. Tollgate can only be closed after all outstanding approvals have been granted.
- ▶ **Documents Tab:** You can attach documents to the activity using this tab.
- ▶ **Status Indicator Tab:** Displays the status indicators associated with an activity. These indicators are set up by your administrator.
- ▶ **Dependencies Tab:** You can view and specify the inter and intra project dependencies. You can also specify the type of dependency associated with a project phase.

Viewing Project Roadmaps










To view the roadmap for a project:













1. Click on the **Projects** link on the Left Navigation Bar, or from the Top Navigation Bar select **Go To > Project**. A list of projects is displayed.
2. Select a project and click the **Roadmap** link on the left navigation bar, or from the Project Module Menu (**Project #**) **Go To > Roadmap**. The project's roadmap is displayed.

See topic **Using Control Buttons** (on page 72) for more information on the control buttons displayed on the Roadmap page.

Icons on the Project Roadmap

The table below describes the fields and icons that are displayed on the Project Plan page. Place your cursor over the icons in the user-interface to see their explanation.

Column	Icon Displayed	Description
#		Displays the activity number.
Name		Displays the activity name.
✔ (Status)		<p>Displays the status of the activity (phase, deliverable, or tollgate, etc).</p> <p>Note: If the activity is Open, the Status column will be blank for all non-top level activities like Tasks, Deliverables, etc.</p> <p>For top-level activities like Phases, Stages, etc. the Status icon indicates on-time status of the activity. For newly created Phases, the Status indicator might be blank till the nightly process runs and sets the on time indicators.</p> <p> The phase is past the due date.</p> <p> The phase is at risk of not meeting the due date.</p> <p> The phase is on schedule.</p> <p> The phase is on-hold.</p> <p>If the activity type is Task, Tollgate, Deliverable, etc.</p> <p>✔ The task has been completed.</p> <p> This task has been marked Not-Applicable.</p>
◆ (Milestone)		<p> Indicates a planned milestone activity.</p> <p> Indicates a milestone that is past the due date.</p> <p> Indicates a milestone that is completed.</p> <p> Indicates a planned key milestone activity.</p>




Column	Icon Displayed	Description
		 Indicates a key milestone that is past the due date.  Indicates a completed key milestone activity.
		  See Tollgates section below.
		Displays if there is a mismatch between the Estimated Remaining Effort and Estimated Time to Complete.
		Activity has tools associated with it. You must download and complete the tool before closing the phase. Use the Documents tab to view the tools.
		Activity has documents. Use the Documents tab to view the attached documents.
		Displays the aggregate status of the tasks. Note: You can view and configure the aggregate status from the Status Indicator tab.
Type		Displays the type of activity (Phase, Task, Deliverable, or Tollgate, etc).
Resources		Displays the resources assigned to the activity.
Approvers		Displays names of approvers. The approvers may need to sign-off before completing an activity.
Baseline Start		Displays the baseline start date.
Baseline Completion		Displays the baseline end date of the activity.
Target Start		Target start date of the activity.
Target Completion		Target completion date of the activity.
Actual Start		Actual start date of the activity.
Actual Completion		Actual completion date.
Estimated Time to Complete		The estimated time (in hours) to complete this activity.

Column	Icon Displayed	Description
Estimated Remaining Effort		The estimated remaining effort (in hours) to complete this activity.
Labor Expense Type		The type of LET. This attribute is added to project activities and is associated with a finance expense category (Capital Expense, or Operational Expense).
Comments		Displays the comments entered for each activity.

Tollgate Icons



The following tables show the various icons and mouse-over text messages you may see in the tollgate field on the Project Plan page.

If resources are enforced for activities, you will see the following tollgate icons:



Icons	Mouse-Over Text	Description
	Next Action: Mandatory resources need to be assigned	No mandatory resources or not all mandatory resources have been assigned to this tollgate. Use the Resources tab to assign resources to complete the tollgate.
	Next Action: Mandatory Resources Assigned. Tollgate can be Completed	Mandatory resources have been assigned. You can now close the tollgate by changing the Status to Completed on the General tab.
	Tollgate Approved	The tollgate is closed.

If mandatory resources are not enforced for the activity, you will see the following tollgate icons:





Note: The system still requires you to add at least one resource to complete the activity.

Icons	Mouse-Over Text	Description
	Resources Required	No resources have been assigned to this tollgate. Use the Resources tab to assign at least one resource to complete the tollgate.
	Resources Verified	Resources have verified the tollgate. You can now close the tollgate by changing the Status to Completed on the General tab.

When mandatory resources are not enforced and you have assigned preferred resources, you will see the following tollgate icons:

Icons	Mouse-Over Text	Description
	Resources Required	No resources are assigned to this tollgate. Use the Resources tab to assign at least one resource to complete the tollgate. The preferred resources are marked with an asterisk (*).
	Resources Verified	Resources have verified the tollgate. You can now close the tollgate by changing the Status to Completed on the General tab.

If Approvers tab is enabled and approvers are required before closing an activity, you will see the following tollgate icons:

Icons	Mouse-Over Text	Description
	Select Approvers	You must select required approvers for this tollgate from the Approvals tab.
	Approvals Required	The tollgate has pending approvals.
	Approvals Granted	The tollgate has been approved. You can now close the tollgate by changing the Status to Completed on the General tab.
	Tollgate Approved	The tollgate is closed.

About Roadmap Views

Gantt View

A gantt chart of an entire project can be viewed by selecting (Project Plan Page Menu) **View > Gantt** from the Project's Roadmap page. The chart is a good way to get a quick snapshot view of a project. It can be printed using Print command from the right-mouse-button menu of your browser. See topic *Using the Gantt View* (on page 87).

Assignment View

You can view the resource assignments for all activities or tasks in your Project Plan. To access the Assignment View, go to (Project Plan Page Menu) **View > Assignment**.

Document View

To access the Documents View, go to (Project Plan Page Menu) **View > Documents**. From the Documents view, you can view all the associated documents and tools. For more information see topic **Adding a Document to a Roadmap or Task** (on page 96).

Project Roadmap View

To access the Roadmap or Project Plan view, go to (Project Plan Page Menu) **View > Roadmap**. For detailed instructions, see topic **Viewing Project Roadmaps** (on page 82).

Modifying a Roadmap

You can make changes to a project's roadmap from the Change Roadmap page. To modify a roadmap, do the following:

- 1) From the **Projects** page, select your project and navigate to the **Roadmap** page by selecting **(Project #) > Go To > Roadmap**.
- 2) Select **Change Roadmap** from the Manage Roadmap menu to display the Change Roadmap page.
- 3) You can select a new project type and roadmap from the drop down menu. Based on the new roadmap you selected, a list of phases is displayed on the right.
- 4) On the left side, select the first phase you want to delete from the current roadmap. All phases after this phase including the selected phase are deleted. You can only delete open phases. To delete closed phases, you must reopen the phase before deleting. All activities and tasks from deleted phases are also deleted.
- 5) From the right side, select the first phase you want to add to this project. All phases including the selected phase are added to the project roadmap.
- 6) You can also change the estimated duration of the activity and the planned close date. Click the **Apply** button to make the changes.
- 7) Click the **Update** button to make changes to a roadmap.

Note: The completed date for a roadmap cannot be in the future. It should be after the start date of the roadmap, and after the completion date of all subordinate tasks. User created tasks and roadmaps may be deleted, but roadmap tasks can only be marked **n/a**.


Using the Gantt View

The Gantt view is a graphical display of a project's roadmap. It shows the order in which activities occur over the course of the project. The duration of each activity, using the specified timescale, is displayed as a horizontal bar; and a line connecting activity bars indicates dependencies. Activities that are on the critical path are displayed in red.

Use the Gantt view to do the following:

- ▶ View activities graphically.
- ▶ Track progress by comparing the planned and actual start and finish dates, and by checking the percent complete of each activity.
- ▶ View tasks that are on the critical path.

- ▶ Edit dates and duration of tasks, change % complete, and the status of activities.
- ▶ Add dependencies and documents.

Screen Elements	Description
	Shows the colors that are on the gantt bars.
Display Options	Choose the Gantt view (View Plan Vs. Actual Dates or View Schedule Vs. Actual Dates) you want to display.
Timescale	Choose the timescale (Years and Quarters, Quarters and Months, Months and Weeks and Months and Days) you want to view the project in.
Actions	View details of each task, add documents, change the status of tasks, go to different tabs, create and edit peer and child activities, or create intra and cross projects dependencies.
Show Critical Path	Shows activities that are on the critical path when this check box is selected. Your selection is retained for the session. To save your selection, select Save My Settings .

Mouse Over

You can view additional information on each individual task or activity by moving your mouse over the Gantt bar. You can view the name, % complete, start and end dates, duration of the task, and additional information on critical path activities.

In This Section

Viewing Critical Path Activities.....	88
Editing Gantt View.....	89

Viewing Critical Path Activities

From the Gantt view, you can quickly identify all tasks that are on the critical path. The tasks that can directly impact a project's end date are displayed in red.

To view activities on the critical path:

- 1) From the Project Roadmap, select the **Gantt** tab.
- 2) Click the check box **Show Critical Path**.

Tip:

If no critical path displays, check to see if you have set too much slack in the project schedule.

Editing Gantt View

To edit in the Gantt view, from the **Manage Roadmap** menu select **Edit Gantt (Manage Roadmap > Edit Gantt)**. The rows you can edit are highlighted in pink.

Note: The options under the Save menu are displayed only if you have permissions for *manage_activity_top_level_roadmap* and *manage_activity_other_level_roadmap*, and the project should not be closed/realized or locked for MSP integration, dependencies should be allowed for this project, the scheduling mode should be semi-automatic, and the external mode for dates/duration should be internal.

Changing Dates and Duration

To change dates and duration, do the following:

- 1) From the *Gantt View* page, select **Edit Gantt** from the **Manage Roadmap** pull-down menu.
- 2) Select an activity, the activity you selected will be highlighted. To change the end date, drag the bar from the right side and move to the desired date. To change the start date drag and move the bar from the left side. You can also click on the **Calendar** icon to select and change the start and end dates.
- 3) From the **Save** menu, you can select **Save/Compute Dates** or select **Save/Compute Dates and Update Plan** to save your changes and update the roadmap.

Changing the Percent Complete

To change the percent complete, do the following:

- 1) From the *Gantt View* page, select **Edit Gantt** from the **Manage Roadmap** pull-down menu.
- 2) Select an activity and right click on the bar and select **Update % Complete here**, the value is set to where you are in the bar when you selected this option. You can also right click on the bar and select **Enter % Complete**. A pop up window appears where you can enter the % complete. The changes are reflected in the WBS (Roadmap).
- 3) From the **Save** menu, you can select **Save/Compute Dates** or **Save/Compute Dates and Update Plan**.

Note: To manually change the % complete, the *Task % Complete* must be set to **Manual**. You can change this from the Basics tab (from the **Actions** menu select **View Details**, and choose the **Basics** tab). This is typically set by your Administrator.


Creating Dependencies

To create dependencies, do the following:

- 1) From the *Gantt View* page, select **Edit Gantt** from the **Manage Roadmap** pull-down menu.

- 2) To create dependencies, click on the bar associated with an activity or task and drag vertically down and drop to the next activity. A blue line is displayed showing the link. The linked task is always set to start only after the previous task has ended.
- 3) From the **Save** menu, you can select **Save/Compute Dates**. You can save the changes and update the WBS (roadmap) by selecting **Save/Compute Dates and Update Plan**. You can view the dependencies on the Roadmap page under the predecessor column.

Completing Roadmap and Task Tool Templates

You can complete an activity assigned to you from the **Roadmap** page. The  image indicates that a tool (e.g., completing an FMEA tool) is present and you must update it before completing an activity or task.

- 1) From the **Projects** page, select your project and navigate to the Roadmap page (**Project #**) **> Go To > Roadmap**.
- 2) From the **Roadmap** page, select the activity and click on the **Documents** tab.
- 3) Click the **Template** link to download the tool template. Make the necessary changes outside the EnterpriseTrack system and save the file.
- 4) Click the **Upload** link to upload your file. Once you have uploaded your file, you will be able to see the revision history and edit and delete the tool.
- 5) Use the **Current** link to view or save the most current version of the tool. The **Revisions** link allows you to view the history and the contents of each version of the tool.
- 6) Select the **General** tab, and modify the **Percentage Complete** and change the **Status** to **Completed**.
- 7) Click the **Save** button to complete an activity.

Group Edit of the Roadmap

EnterpriseTrack allows you to edit the resource, status and dates of all activities and tasks on the Roadmap page.

- 1) From the **Projects** page, select your project and navigate to the **Roadmap** page (**Project#**) **> Go To > Roadmap**.
- 2) From the Roadmap page select (Page Menu) **View > Edit All**.
- 3) You can select the **Auto Assign** check box next to Resources or Approvers to automatically select from the list of preferred resources or approvers. You can also select the assignment types.
- 4) To enter dates, click on the calendar icon and select a date for the Plan Start, Plan Completion, Actual Start and Actual Completion dates.
- 5) To complete all tasks select the **Open, Not Applicable** or **Completed** check box from the *Mark all Items* column.
- 6) Click **Save** to save the changes or cancel to leave the page without saving any changes.

Notes:

- As soon as an owner is assigned, the system sends an informative email to that user with the details of the task and roadmap and the due dates. To make sure that the owner gets the most accurate information, Oracle recommends that you edit the status and the dates before assigning owners.
- Error messages are highlighted in red. Move your mouse over the red cell to see the error message.
- For more information on using fractional duration and effort, see topic Using Fractional Duration.

Using Keyboard Shortcuts: Project Roadmap Page

The table below lists some of the keyboard shortcuts you can use on the Project Roadmap page.

Project Roadmap Page

Keyboard Shortcut	Description
Insert (After selecting a row)	Add a new peer activity. You can use this only if the activity type default is set.
Ctrl + Insert (After selecting a row)	Add a new child activity. You can use this only if the activity type default is set.
Up arrow	Move up a row.
Down arrow	Move down a row.
Page Up	Move to the top of the page.
Page Down	Move to the bottom of the page.
Home	Goes to the first activity on the page.
End	Goes to the last activity on the page.

Working with Project Activities





In This Section


Adding a New Activity or Task	92
Assigning Resources to an Activity or Task	95
Adding a Document to a Roadmap or Task	96
Working with Project Dependencies	96
Working with Project Status Indicators	97
Working with Resource Effort Distribution.....	98
Working with Efforts and Dates	98
About Effort Types.....	99
Viewing Finances for an Activity	101
Modifying an Activity or Task	101
Activity Approvals	102
Completing an Activity	103

Adding a New Activity or Task






You can add child or peer activities to an existing roadmap from the project Roadmap page.

Adding a Child Activity

- 1) Navigate to **(Project #) Go To > Roadmap** page of your project.
- 2) Select the level below which you want to add a new child activity and press the **Ctrl + Insert** keys on your keyboard, or click the **Add Child** button, or select  **>New > Child Activity**. You can select the type of activity (e.g. Add Tollgate or Add Task) by clicking the sub-menu selector button.
- 3) Enter a name for the task.
- 4) Click on the **Calendar** icon to enter the start and end dates.
- 5) You can also assign dependencies by typing the predecessor task number in the *Predecessors* column. The predecessor column is available only if the Activity Type underlying the activity you are creating has dependencies available.
- 6) To assign resources, click on the  button to view the resource pop-up list. This pop-up shows a list of resources already on the Project Team. From this pop-up you can add a new resource to this activity and also to the Project Team. To do this, select the Project Role you want the new resource to take on. Then the pull-down will show the list of resources in the system that can take on this project role. You can also do a type-ahead in the resource pull-down box. Enter the last name of the resource and a list of matching resources will be shown, click on selected resource and on the **Assigned** checkbox. You can also filter resources based on availability by clicking the **Filter**  button. You can select multiple resources and also enter the plan availability. Click on the  button to hold your changes in the resource pop-up while you are entering values on other fields. You must click the **Save** icon to save your changes.
- 7) Click the **Save** button to add an activity or task.

- 8) You can add additional details like dates, finances, resources, documents, etc using the Activity Details dialog ( > **View Details** or **Edit**).

Adding a Peer Activity

- 1) Navigate to the **(Project #) Go To > Roadmap** page of your project.
- 2) Select the level at which you want to add a new peer activity and press the **Ctrl** key on your keyboard, or click the **Add Peer** button, or select  > **New > Peer Activity**. You can select the type of activity (e.g. Add Tollgate or Add Task) by clicking the sub-menu selector button.
- 3) Enter a name for the task or activity.
- 4) Click on the **Calendar** icon to enter the start and end dates.
- 5) You can also assign dependencies by typing the predecessor task number in the *Predecessors* column. The predecessor column is available only if the Activity Type underlying the activity you are creating has dependencies available.
- 6) To assign resources, click on the  button to view the resource pop-up list. This pop-up shows a list of resources already on the Project Team. From this pop-up you can add a new resource to this activity and also to the Project Team. To do this, select the Project Role you want the new resource to take on. Then the pull-down will show the list of resources in the system that can take on this project role. You can also do a type-ahead in the resource pull-down box. Enter the last name of the resource and a list of matching resources will be shown, click on selected resource and on the **Assigned** checkbox. You can also filter resources based on availability by clicking the **Filter**  button. You can select multiple resources and also enter the plan availability. Click on the  button to hold your changes in the resource pop-up while you are entering values on other fields. You must click the **Save** icon to save your changes.
- 7) Click the **Save** button to add an activity or task.
- 8) You can add additional details like dates, finances, resources, documents, etc using the Activity Details dialog( > **View Details** or **Edit**).

Notes:

- The start date can be any date after the project start date. If a roadmap start date was selected, the task start date defaults to the roadmap start date, and has to be after this date.
- The due date should after the start date and before the phase due date. If a roadmap due date was selected, the task due date defaults to the roadmap due date, and has to be before this date.


Field	Description
Activity Name (Tollgate, Task, Deliverable, etc.)	Enter a name for this activity.
Milestone	Check the box if the activity is a milestone activity. You can also select if the activity is a key milestone activity.

Task Type (Only displayed if the activity is a Task.)	The task type, for example: Analysis Tool, General, Control Plan, etc.
Deliverable % Completion	Choose how the deliverable completion should be calculated. You can choose from the following options: Duration-Based, Effort-Based, Count-Based Immediate Children, Count-based All Children, Physical, and Manual.
Duration-Based % Completion	Choose how the duration-based completions should be calculated. You can choose from the following options: Actual VS Planned Duration-Self, Actual VS Planned Duration-ImmediateChildren, Actual VS Planned Duration-AllChildren, and Manual/External.
Effort-Based % Completion	Choose how the effort-based completions should be calculated. You can choose from the following options: Actual VS Planned Duration-Self, Actual VS Planned Duration-ImmediateChildren, Actual VS Planned Duration-AllChildren, and Manual/External.
Physical % Completion	Select the physical % completion (Manual/External)
Open Items	Enter the open items.
Enforce Resources	Select if you want to enforce assigning resources to this activity.
All Resources Required (Only enabled if you selected Yes on Enforce Resources.)	Select if all resources are required to complete this activity. If you select Yes, then all resource roles that you select in the next field Mandatory Resources must be assigned from the Resources tab.
Preferred Resources (Displays only if you selected No on Enforce Resources.)	From the list, select the type of preferred resources for this task. You can check the <i>Select All/None</i> box to select or deselect all resource types in the list. If you select preferred resources, the system allows you to choose resources from the Resources tab that match the preferred resource type (e.g. Finance Representative, Project Sponsor etc.) you select here.
Approvers can modify Activity Status	Select if an approver can close or complete an activity.
Enforce Approvals	Select if you want to enforce approvals to this tollgate. If you select Yes , you cannot complete the tollgate unless you have received approvals.
All Approvers Required (Enabled if you chose Yes on Enforce Approvals)	Select if all approvals are required. If you select No , you can complete the tollgate even if you have not received all approvals.

Approvals.)	
Preferred Approvers	Select the type of preferred approvers from the list. You can check the Select All/None box to select or deselect all approver types in the list.
Labor Expense Type	From the drop-down list, select a Labor Expense Type. The choices you see are set by your Administrator.
Fixed	Enter the Plan and Actual fixed costs for this activity.
Material	Enter the Plan and Actual material costs for this activity.
Other	Enter other costs associated with this activity.
Allow Activity to be Marked Not Applicable	Select Yes or No .
Comments	Enter any comments associated with this activity.
Open Items	Enter any open items associated with this activity.

Assigning Resources to an Activity or Task

An owner is assigned to an activity or task from the **Roadmap** page. To assign a new owner, do the following:


- 1) Select a project and navigate to the Projects roadmap page (**Project #**) > **Go To > Roadmap**.
- 2) From the **Roadmap** page, select the activity or task.
- 3) Select  > **Edit > Resources**. The resource currently assigned to this activity or task is displayed.
- 4) Assign an existing team member to the activity or click the **Add Resource** button to add a new resource to this activity or task.
- 5) Choose a project role for the new resource.
- 6) Select a new resource from the drop-down menu. You may only choose from the list of current project team members.
- 7) Enter the **Percentage Allocation**. You can also choose the role of this resource.
 - ▶ **Accountable (A)**: Individual who is ultimately responsible for a project with a yes/no authority. One function can have only one accountable person.
 - ▶ **Responsible (R)**: Individual working on the activity and responsible for action and execution of the plan. The degree of responsibility is usually determined by "A".
 - ▶ **Consult (C)**: Individual who must be consulted prior to a final decision or action. This involves a two-way communication.
 - ▶ **Inform (I)**: Individual that needs to know of the decision or action. This is usually a one-way communication.

- 8) Enter the Plan and Actual Percent Availability.
- 9) Enter the *Plan Overtime Effort* in hours. Planned and actual overtime are part of the total effort and cannot exceed the total effort.
 - ▶ Total planned effort= Planned standard effort + Planned overtime effort
 - ▶ Total actual effort = Actual standard effort + Actual overtime effort
- 10) Click the **Save** button. A new resource is now added to your activity or task.

Note: If the administrator, while creating the activity template, chose to enforce ownership of a task or roadmap by role, only the project manager or users assigned to the chosen roles may be assigned to the task or roadmap. Contact your administrator for details.

Adding a Document to a Roadmap or Task

You can add documents to a roadmap, activity or task from the **Roadmap** page.

- 1) Select a project and navigate to the **(Project #) Go To > Roadmap** page.
- 2) Locate the appropriate task and click on its name.
- 3) Select  **>Documents > Upload**. The Add a New Document screen.
- 4) Enter the document name and a description.
- 5) Select the type of document you are creating. The categories of document types are created during system configuration.
- 6) Enter the complete path to the document location. You can also use the **Browse** button to locate the document in your machine or network.
- 7) If you do not want users to modify the document, and if you have the appropriate permissions, you can choose to lock the document.
- 8) To make this document a Best Practice document and add it to the Global Knowledge Base, select the Should this be published as a best practice? option. You will need the appropriate permissions to add documents to the Knowledge Base.
- 9) To make this document confidential select the Is this document confidential option. You can select the users who are allowed to view this document.
- 10) Click **Add Document** to upload your document


Working with Project Dependencies

From the project roadmap page you can view and specify dependencies from the same project or from other projects. The scheduled status indicator of the predecessor tasks, the predecessor IDs and the type of dependency (finish to start, or offset) are also displayed.


Note: In this release, any date changes made to the predecessor tasks will not change the dates in the current project.

Viewing Project Dependencies

- 1) Select a project and navigate to the **(Project #) Go To > Roadmaps** page.

- 2) From the Roadmap page, select a phase.
- 3) Select  > **View Details** > **Dependencies** tab to view the inter and intra project dependencies.

Adding New project Dependencies

- 1) Select a project and navigate to the **(Project #) Go To > Roadmaps** page.
- 2) From the Roadmap page, select a phase.
- 3) Select  > **View Details** > **Dependencies** tab. The current inter and intra project dependencies are displayed.
- 4) To add a new inter-project dependency, do the following:
 - a. From the **Predecessor** row, click the **Add New** icon.
 - b. Select a sequence number for the activity, or click the **[View]** link and select an activity. The sequence number is automatically populated.
 - c. Enter the type of dependency.
 - d. You can select either a Delta offset or Percentage Completion by Date Range. Enter the delta days or enter the percentage completion.
 - e. Select the type of enforcement and enter a description.
 - f. Click the **Save** button to add a new dependency.
- 5) To add a new intra-project dependency, do the following:
 - a. From the **Cross-Project Predecessor** row, click the **Add New** icon.
 - b. Enter the project number. If you don't know the project number, you can click the **[Filter]** link to find your project based on certain criteria.
 - c. Select a sequence number for the activity.
 - d. Enter the type of dependency.
 - e. You can select either a Delta offset or Percentage Completion by Date Range. Enter the delta days or enter the percentage completion.
 - f. Select the type of enforcement and enter a description.
 - g. Click the **Save** button to add a new dependency.

Working with Project Status Indicators

You can view the project status indicators from the **Status Indicators** tab on the project roadmap page. You can view the name of the status, the current and previous values, and the type of computation used to display the status. The status indicators are configured by your administrator and are displayed only if enabled by your administrator.

Setting the Status Manually

To manually set the status:

- 1) From the **Status Indicator** tab, select **Edit**.
- 2) Select **Set Manual Status**. This option displays only if the status indicator was set to Manual Calculation by your administrator.
- 3) Select a value.
- 4) Select **Save**.

Recomputing the Status


You can recompute the status indicators if the dates on the activity have changed or to display status indicators for an activity.

To recompute the status:

From the **Status Indicator** tab, select **Recompute**.


Working with Resource Effort Distribution

You can use the Resources tab to assign and plan the effort for each resource associated with a project activity.

- 1) Select a project and navigate to the Roadmap page **(Project #) > Roadmap**.
- 2) Select an activity.
- 3) Select  **> Edit > Resources**. The current resources and effort distribution is displayed.
- 4) Select the Period Type if you chose *Plan Effort Type* as **Effort at Resource Level (Detail)**.
- 5) Click the *Assigned* checkbox to select the resources.
- 6) Select the role this resource this resource will play. You can check the box next to **R** (Responsible) or **A** (Accountable).
- 7) Enter the percentage that this resource is available to work on the activity.
- 8) Enter the effort distribution if you chose **Effort at Activity Level – Unequal % Distribution** for *Plan Effort* or *Actual Effort*.
- 9) Enter the number of hours under *Total Effort* and *Overtime Effort* if you chose **Effort at Resource Level (Summary)** for *Plan Effort* or *Actual Effort*.
- 10) Select the assignment type.
- 11) Click the **Save** button to save your changes.

Working with Efforts and Dates

You can compute completion dates for tasks based on duration or effort estimates.

- 1) Select a project and navigate to the *Roadmap* page **(Project #) > Roadmap**.
- 2) Select an activity.
- 3) Select  **> Edit > Efforts/Dates**. The efforts and dates for the activity are displayed.
- 4) Click the **Edit** button next to **Plan Effort Type**. Select a Planned Effort Type (PET) from the drop down menu choices.
- 5) Click the **Edit** button next to **Actual Effort Type**. Select the appropriate **Actual Effort Type (AET)** from the drop-down menu choices.
- 6) Select if you want to include plan effort in project budget. If this flag is set to **Yes**, then this activity's costs will roll up to the project budget.
- 7) Enter the appropriate Baseline, Plan, Actual and Remaining Effort. Based on the Planned Effort Type (PET), and Actual Effort Type (AET) you have selected, different effort fields are enabled for data entry. For example, if the AET is set to Effort from Timesheets, then the actual effort flows through from approved timesheets.

- 8) Enter the start date, completion data and duration for the Baseline, Plan and Actual data types.
- 9) Click the **Save** button to make the necessary changes.

Note: If the AET is changed from Duration to Timesheet, then the data received from all approved timesheets for this activity is used to populate the activities within the roadmap and all resource and finance tables. If the PET is changed from Duration to Effort at Activity Level, then based on the data at the activity level the duration is calculated and the effort is distributed among the resources. If the PET is changed from Effort at Resource Level (Detail) to Effort at Resource Level (Summary), the weekly effort/cost data provided by user may be lost. For more information on using fractional duration/effort, see topic Using Fractional Duration.

About Effort Types

You can set the Effort Type for an activity to be duration-based or effort-based. When you select duration-based, the effort is calculated based on the duration of the activity and the resources assigned to it. When effort-based is selected, effort is calculated based on the time required by a resource to complete an activity.

Different Effort Type options are displayed for Planned Effort Type (PET) and Actual Effort Type (AET) modes. For the mode Planned Effort Type, you can select the following effort types:

- ▶ Duration & Resource % Availability
- ▶ Effort at Activity Level – Equal % Distribution
- ▶ Effort at Activity Level - Unequal % Distribution
- ▶ Effort at Resource Level (Summary)
- ▶ Effort at Resource Level (Detailed)

For the mode Actual Effort Type, you can select the following effort types:

- ▶ Duration & Resource % Availability
- ▶ Effort at Activity Level – Equal % Distribution
- ▶ Effort at Activity Level – Unequal % Distribution
- ▶ Effort at Resource Level (Summary)
- ▶ Effort at Resource Level (Detailed)
- ▶ Effort at Resource Level from Timesheet
- ▶ Effort at Resource Level from Finance

Duration & Resource % Availability

This is a duration-based Effort Type. Effort is calculated based on the duration and the number of resources assigned to the activity. You cannot edit the effort.

Effort at Activity Level - Equal % Distribution

This Effort Type is effort-based. The completion date and duration of an activity is calculated based on the start date, and the effort (Plan, Actual and Remaining) that is entered for each assigned resource. The effort is equally divided among the assigned resources. You cannot edit the completion date and the duration.

Plan duration for a task is computed based on the maximum duration across assigned resources. For example: Activity A starts on May 7th and requires 20 hours to complete. It is assigned to both Rick and Ann. Rick will work 10 hrs. starting on May 7th and finishing on May 8th. Ann on her calendar has marked May 8th as a non-working day, so she will work 10 hrs. starting on May 7th and finishing on May 9th. The completion date for this activity will be May 9th and not May 8th.

Effort at Activity Level - Unequal % Distribution

This Effort Type is effort-based. The completion date and duration of an activity is calculated based on the start date, and the effort (Plan, Actual and Remaining) that is entered for each assigned resource. You can use the *Effort Distribution* field to enter the effort for each resource assigned to the activity. The combined resource availability determines the completion date of an activity. You cannot edit the completion date and duration of an activity.

Plan duration for a task is computed based on the maximum duration across assigned resources. For example: Activity A starts on May 23rd and requires 56 hours to complete. It is assigned to both Rick and Ann with a 70/30 distribution. Rick will start on 23 and end on 28, and Ann will start on 23rd and end on 26th. The start date for the activity is 23rd and the end date will be 28th. The duration for the activity will be 5 days.

Effort at Resource Level (Summary)

This Effort Type is effort-based. The completion date, duration, and effort are calculated based on the start date, and the effort that is entered at the resource level for each assigned resource. The effort is entered only at the resource level and not at the activity level. You cannot edit the duration and the completion date of the activity.

Effort at Resource Level (Detailed)


This Effort Type is effort based. The total planned effort, total actual effort, completion date and duration are calculated based on the start date, and the effort that is entered at the resource level for each assigned resource. You cannot edit the duration and completion date. Detailed effort is added in weekly increments on the *Resources* tab.

Effort from Timesheets

This Effort Type pertains only to the Actual Effort Type and is displayed only if the timesheet feature is enabled. The actual start, completion dates, and duration are editable but do not affect the actual effort. The Actual Effort is a read-only field and its value is obtained from timesheets.

Viewing Finances for an Activity

Your system may also be configured to allow you to track financial information at the level of the activity. The financial data for each activity is rolled up to display project level financial information.


- 1) Select a project and navigate to **(Project #) Go To > Roadmap** page.
- 2) Select  > **View Details** and select the **Finances** tab to view the financial information.

You can track the finances for the activity at the Resource or the Task level. The activity can be configured to display the currency amounts (E.g. for Material Costs) or number of hours (E.g. for Labor Costs). You can also view the overtime cost associated with project resources and also the set up cost associated with a project or activity.

Modifying an Activity or Task


Selecting Columns to display

To ensure that the editable columns are displayed on the Roadmap page when modifying an activity, do the following:

- 1) Navigate to the Roadmap page. From the (Page Menu) **View** select **Columns**, or click the **Select Columns**  button. The *Select Columns to display* pop-up appears.
- 2) Ensure that the columns you want to edit (Name, Resource, dates, etc.) are enabled for display. If it is not already selected, then select the columns you want displayed and click **OK**. The Roadmap page is refreshed with the selected columns. Based on your settings only certain columns may be editable.

Editing an Activity or Task

To modify an activity or task, do the following:

- 1) From the **Project Roadmap** page, select the activity you want to edit.
- 2) Select  > **Edit** and select the tab you want to edit. See topic **About Project Roadmaps and Tasks** (on page 82) for more information on these tabs. You can also click on the row to put it in the edit mode. The fields you can modify are in pink.

Note: You can edit only some columns from within the grid. Some of the columns you can edit are the task name, resources, dependencies, duration, start date, end date, planned effort and comments. You cannot edit the task name if the task name comes from the roadmap. You can change the name only if it is a task you have added. When editing dependencies within the grid, you cannot edit the dependency type and lag.





- 3) Click on the **Calendar** icon to edit the start and end dates.

Note: Various settings on the activity determine if all the start/end dates are editable.

- If the activity you are editing is *Effort based*, then its start date is

editable, but its end date is automatically determined by the Effort on the activity.

- If the activity has a dependency on a previous activity, then some of its dates will come implicitly from the dependent activity and cannot be edited.


-
- 4) You can assign dependencies by typing the predecessor task number in the *Predecessors* column. The predecessor column is available only if the Activity Type underlying the activity you are editing has dependencies available. Note cross-project dependencies cannot be edited from within the grid, you have to select  > **Edit > Dependencies**.
 - 5) To change resources, click on the  button to view the resource pop-up list. This pop-up shows a list of resources already on the Project Team. From this pop-up you can add a new resource to this activity and also to the Project Team. To do this, select the Project Role you want the new resource to take on. Then the pull-down will show the list of resources in the system that can take on this project role. You can also do a type-ahead in the resource pull-down box. Enter the last name of the resource and a list of matching resources will be shown, click on selected resource and on the **Assigned** checkbox.
You can also filter resources based on availability by clicking the **Filter**  button. You can select multiple resources and also enter the plan availability. Click on the  button to hold your changes in the resource pop-up while you are entering values on other fields. You must click the **Save** icon to save your changes.
 - 6) Once you have made all your changes, click the **Save** icon to save changes or **Cancel** to cancel out your changes.

Note: You cannot add tasks to a completed roadmap. The completed dates for a task cannot be in the future; it should be after the start date of the task. User created tasks may be deleted but roadmap tasks can only be marked n/a.

Activity Approvals

You can view and select approvers, request for approvals, check status and approve project activities from the Approvals tab.


View and Select Approvers

- 1) Select an activity and select  > **View Details > Approvals**.
- 2) Click the **Edit** button.
- 3) Select the approvers and click **Save**.

Request for Approval

- 1) Select an activity and select  > **View Details > Approvals** tab.
- 2) Click the **Request For Approval** button.
- 3) Select an approver and click the **Request Approval** button.

Approving an Activity


- 1) Select an activity and select  **>View Details > Approvals** tab.
- 2) Click on the **Approve** button.
- 3) Select the status of the activity (**Approved**, **Approval Denied**, or **Conditional Approval Granted**), and click **Update**.

Completing an Activity

Using the Summary Tab

The Summary tab will assist you in completing all the required items before marking an activity as Complete. For example, you can view if any child activities are still open, if mandatory resources are not assigned or if approvers have not been assigned or have not signed off on this activity.

To complete an activity using the Summary tab, do the following:


- 1) From the **Project Roadmap** page, select  **>View Details**.
- 2) Select the **Summary** Tab.
- 3) Click on the **Complete** button.
- 4) Click **Save**.

Using Quick Edit

To complete an activity do the following:

- 1) Navigate to the **Roadmap** page by selecting **(Module Menu) Project # > Roadmap**.
- 2) Locate the appropriate activity, and click on the row to put it in the edit mode. The rows are highlighted in pink.
- 3) From the **Status** pull-down menu, select **Complete**.
- 4) Click **Save**.

Using the Basics Tab

- 1) Navigate to the **Roadmap** page by selecting **(Module Menu) Project # > Roadmap**.
- 2) Select an activity and select  **> View Details**.
- 3) Select the **Basics** tab.
- 4) Click on the **Complete** button.
- 5) Click **Save**.

Managing Project Gates or Phases

In This Section

Complete a Gate Activity	104
Reopen a Gate Activity.....	104

Complete a Gate Activity

If you have the permission to close or advance a gate activity you will be able to change the Status of a Gate activity. When all the activities for a given phase are Completed or marked Not Applicable, then the gate can be completed. Completing a gate is exactly like completing any other kind of activity.


If your deployment configuration is set to automatically close gates on completion of all activities within it, then the gate activity will be automatically completed when the last activity in the current phase is marked complete. The project gates will automatically be advanced till the project is in the final phase. After all activities in the last phase are closed, the last gate will remain open till the project lead or user with project close permission closes the project.

To complete a phase, do the following:

- 1) Navigate to the **Project Roadmap** page by selecting **Project # > Go To> Roadmap**.
- 2) From the **Roadmap** page, click the **Close Phase** button.
- 3) Select a close date for the phase. The system will suggest possible dates for this field. The phase close date should be later than the phase start date, which should be later than project start date. In addition the close date has to be after the close date of the last deliverable in that phase.
- 4) Click the **Close Phase** button. This will set the phase close date, close the current phase and advance the project to next phase.

Reopen a Gate Activity

You can reopen a closed gate type activity (or phase) from the **Roadmap** page.

- 1) Select a project and navigate to the (Project Module Menu) **Project# > Go To > Roadmap** page.
- 2) Locate the appropriate activity, and select  **> View Details > Basics**.
- 3) Select the **Summary** tab.
- 4) Click the **Re-open Phase** or **Re-open Gate** button.

Working with Generic (Non-WBS) Activities

You can add activities like change requests, discussions, risks, etc. to your project. These activities are not tied to the project roadmap but are associated with a project. The activities and fields are set by your Administrator and are displayed on the Left Navigation Bar.

Adding a Project Activity


To add an activity, do the following:

- 1) Navigate to the Project Module Menu (**Project #**) **> Create> Change Requests (or other configured non-WBS activity)**.
The Details pane will refresh to display the New Activity page.
- 2) In the **Basics** tab, enter a name for this activity.

- 3) Enter the Labor Expense Type (LET), if required.
- 4) Click the **Save** button to add an activity or task.
- 5) From the **Details** pane, you can select the tabs to enter relevant information pertaining to this activity. See topic **About Project Roadmaps and Tasks** (on page 82) for more information on these tabs. You can also use the control buttons on the top to add, copy, and delete activities. For more information on these control buttons, see topic **Using Control Buttons** (on page 72).
- 6) Click **Save**.

Editing an Activity

To modify an activity:

- 1) From the activity page (for example, Change Requests), select the activity you want to edit.
- 2) Select  > **Edit**. Select the tab you want to edit. You can also click on the row to put it in the edit mode.
- 3) Click **Save**.

Moving a Project Activity to the Roadmap

You can also move a project activity to be included as an activity on the project roadmap.

- 1) Navigate to the Project Module Menu (**Project #**) > **Go To** > **Change Requests (or other configured non-WBS activity)**.
- 2) From the activity page (for example, Change Requests), select the activity and click on the **Copy Row** icon.
- 3) Click the **Paste Special** button, a popup with all the roadmap activities displays.
- 4) Select the level where you want to add this activity and click the **Paste** button. The selected activity is now added to the project roadmap.

Note: The Paste button is disabled if your project roadmap is configured to not allow this type of project activity to be added to the roadmap.

Working with Project Documents

In This Section

Adding a New Document.....	106
Updating and Deleting a Project Document.....	106

Adding a New Document

In EnterpriseTrack, Project specific documents can be uploaded to the documents section located within a particular project. This is in addition to any completed tools or documents that were attached to a specific task or deliverable.


- 1) To add a new project specific document, navigate to the **Documents** page by clicking the **Documents** link on the Left Navigation Bar within a particular project, or from the Top Navigation Bar select **(Project #) Go To > Documents**.
- 2) Click the **Create** button.
- 3) Enter a name for the document.
- 4) Enter a description of the document.
- 5) Select the type of document you are creating. The categories of document types would have been created during system configuration.
- 6) Enter the complete path to the document location, or use the **Browse** button to locate it on your machine or the network. You can also enter a fully qualified URL if the document is hosted external to the system.
- 7) If you do not want users to modify the document, and if you have the appropriate permissions, you can choose to lock the document.
- 8) To make this document a Best Practice document and add it to the Global Knowledge Base, select the **Should this be published as a best practice?** option. You will need the appropriate permissions to add documents to the Knowledge Base.
- 9) To make this document confidential select the **Is this document confidential** option. You can select the users who are allowed to view this document.
- 10) Click **Add Document** to upload your document.
- 11) The document will be listed on the **Documents page**. Click the **File Name / URL** link to download or view the document.

Updating and Deleting a Project Document

In EnterpriseTrack, project specific documents are uploaded to the documents section located within a particular project. Multiple versions of a document are maintained to enable users to refer back to prior versions as needed.

- 1) To update a project specific document, navigate to the Documents page by clicking the **Documents** link on the Left Navigation Bar within a particular project, or from the Top Navigation Bar select **(Project #) Go To > Documents**.
- 2) Locate the document you wish to update and click on its name.
- 3) Make the required changes. To view a history of the revisions made to the document click the **View Revision History** link. From this page, you may download prior versions of the document by clicking on the link under **File Name/URL**.
- 4) You can also choose to make a document have read-only properties from the **Update or Delete Document** page. Once a document is marked read-only, only the administrator will be able to update and delete this document.

- 5) Click the **Update Document** button to save your changes.

Note: If a document is locked, you may not be able to update it. The lock icon  is displayed next to all the locked documents on the Project Documents page. If you have the required permissions, you can unlock it from the **Update or Delete Document** page.

Deleting Documents

- 1) To delete a document, click on the name of the document.
- 2) Click the **Delete Document** button to delete the document. You may be required to confirm the deletion.

Note: Once a document is deleted, its revision history is also deleted.

Working with Project Financial Data

In This Section

Viewing Project Finance Summary	107
Viewing Project Finance Details	108
Editing Financial Data	109
Comparing Finances	109
Requesting Financial Data Validation	110
Validating Financial Data	110
Working with Finance Snapshots	111
Modifying Financial Locks	112
Working with Finance Settings	113

Viewing Project Finance Summary

You can view a summary of project finances for the entire project and for the fiscal year from the **Summary** tab. You can also see the variance between Plan or Actual values and your selection of Forecast or Snapshot values. For projects using the double-view template, you can select either Forecast or Snapshot when calculating variances. For projects using the single-view template, you can only use Snapshot to calculate variance.

The Finance Summary page displays the following information:

- ▶ **Finance Calculations:** Displays the financial calculations specified for your project such as the Net Present Value (NPV), Internal rate of Return (IRR) and Return on Investment (ROI). This section is visible only if it is enabled in the financial template by your administrator.
- ▶ **Current Fiscal Year:** Provides totals for the current fiscal year, to date.
 - ▶ **Category:** The finance categories that are configured in your finance template by your administrator. Each category can have multiple subcategories.

- ▶ **View:** For projects using the double-view template, both the Plan and Actual values are displayed. For projects using the single-view template, the finances are not separated as Plan and Actual, but are displayed on a single column labeled Finances.
- ▶ **Variiances:** For projects using the double-view template, you can view the variance between Forecast or Snapshot values and Actual or Plan values. For projects using the single view template, you can only use Snapshot to calculate variance.
- ▶ **Project Totals:** Provides totals for the project as a whole (not time-limited).
 - ▶ **Category:** The finance categories that are configured in your finance template by your administrator. Each category can have multiple subcategories.
 - ▶ **View:** For projects using the double-view template, both the Plan and Actual values are displayed. For projects using the single-view template, the finances are not separated as Plan and Actual, but are displayed on a single column labeled Finances.
 - ▶ **Variiances:** For projects using the double-view template, you can view the variance between Forecast or Snapshot values and Actual or Plan values. For projects using the single view template, you can only use Snapshot to calculate variance.
- ▶ **Finance Validation:** This section shows the number of finance validations that were requested and the status of the validation.


Note: Some of the finance terms listed above may be renamed in your EnterpriseTrack configuration.

To view project financial summary:

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Click the **Summary** tab.
- 3) To view the variiances: select an option from the **Variance** drop-down menu.

Viewing Project Finance Details

To view detailed project finance data:

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Click the **Detailed Finances** tab.
- 3) For projects using the double-view template: on the Main View from the **View Type** drop-down menu, select the view (**Plan** or **Actual**) you want to edit.
- 4) From the **Timescale** drop-down, select **Yearly** or **Monthly**.
- 5) From the  **Date Range Display Options**, select your options and click **Update**.
 - ▶ Date Range: Select from one of the following options: **All**, **Current Fiscal Year**, **Current Calendar Year**, or **Specified Date Range**.
 - ▶ Display Options: Select either or both options: **Display Fiscal (Annual) Year Totals** and **Display Project Finance Totals**.
 - ▶ Display Fiscal Year (Annual) Totals: Displays fiscal Year totals row wise for the months shown on the detailed finance view.

- ▶ Display Project Finance Totals: Display project finance totals row wise from the start date to the end date or the last month displayed in the date range display option selection, whichever is earlier.

Editing Financial Data

Users with appropriate permissions (e.g., project managers, finance representatives) can enter monthly project savings and costs (both hard dollar and soft dollar) at a detailed level from the start of the project. These can be entered manually or will roll up from Finances based on the AET.

To edit or enter finance data:

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Click the **Detailed Finances** tab.
- 3) For projects using the double-view template: on the Main View from the **View Type** drop-down menu, select the view (**Plan** or **Actual**) you want to edit.
- 4) Ensure that the **Comparison View** check box is unchecked.
- 5) From the **Snapshot or Current** drop-down menu, select **Current**.

Note: You can edit the finance data of a snapshot only if your project uses the single-view template.

- 6) To edit finances for a particular category for all months, select a financial category from the **Edit Finances for Category** pull-down menu. You will be able to enter data for each sub-category within that category, for all the months.
- 7) To edit finances for all categories and sub-categories for a particular month, select the month from the **Edit Finances for Month** pull-down menu.
- 8) To populate all appropriate fields with the same number, you can use the **Copy Forward to...** and the **Current Year** and **All Months** buttons on the Edit Finance for Category page.
- 9) Click **Update** to save your changes.

Notes:

- Any multiplication factors that are part of your finance configuration are displayed on the **Settings** page.
 - If you are unable to edit financial data for a particular period, please contact your administrator.
-

Comparing Finances

Use the **Detailed Finance** tab to compare two finance views side-by-side.

To compare finances:

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Click the **Detailed Finances** tab.
- 3) Select your main view:
 - ▶ For projects using the double-view template: from the **View Type** drop-down menu, select a view (**Plan, Actual, or Forecast**).
 - ▶ From the **Snapshot or Current** drop-down menu, select if you want to view the current values or values from a snapshot.
- 4) Click the **Comparison View** check box.
- 5) Select your secondary view:
 - ▶ For projects using the double-view template: from the **View Type** drop-down menu, select a view (**Plan, Actual, or Forecast**).
 - ▶ From the **Snapshot or Current** drop-down menu, select if you want to compare the current values or values from a snapshot.

Requesting Financial Data Validation

Users with appropriate permissions (e.g., Finance Representatives, Blackbelts) may need to validate financial projections at any time during the course of a project. Your EnterpriseTrack system may be implemented in such a way that you have to request financial data validation at certain points during a project before additional data can be updated.

To request a validation of the financial data:

- 1) Navigate to the **Project Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Click on the **Validation** tab. You can also click the **Financial Validations** button on the **Summary** tab
- 3) Based on your permissions and the financial approval process implemented within your system, you should see appropriate **Request** buttons.
- 4) Click the **Request** button for the user whose validation you are seeking. The status will be updated to "Pending Approval" and an email request will be sent to that user. The user will also see an item in the My Work page.
- 5) The Validation history will be updated.

Validating Financial Data

Users with appropriate permissions (e.g., Finance Representatives, Blackbelts) can validate financial projections at any time during the course of a project.

- 1) To validate financial data, navigate to the **Project Finances** page by clicking the **Finances** link on the left navigation bar within a particular project. You can also navigate here from your **My Work** page.
- 2) Click on the **Validation** tab.
- 3) Based on your permissions and the financial approval process implemented within your system, you should see the appropriate **Approve** buttons.
- 4) Click the **Approve** button.
- 5) You can enter comments about your approval in the comments field on the **Enter comments for Finance Validation Approval** page in the pop-up window.
- 6) A time stamp will be added in the appropriate column and the Validation history will be updated.

Working with Finance Snapshots

Creating a Snapshot

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) From the **Snapshots** drop-down menu, select **Create Snapshot**.
- 3) Enter a name for this snapshot.
- 4) Enter a description.
- 5) Click **Create Snapshot**.

Editing a Snapshot

You can edit a snapshot only if you have the **Editable Project Finance Snapshots** feature enabled. If your project uses the double-view finance template, you can only edit the name and description of the snapshot. If your project uses the single-view finance template, you can edit the name, description and the finances for category and month.

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Select the **Detailed Finances** tab.
- 3) On the Main View, from the **Snapshot or Current** drop-down menu, select the snapshot you want to edit.
- 4) Click the **Snapshot** button and select **Edit Details**.
- 5) Change the name of the snapshot.
- 6) Click **Update**.

Note: In projects using the single-view finance template, the snapshots do not include Plan Effort option.

Deleting a Snapshot

You can delete a snapshot only if you have the **Editable Project Finance Snapshots** feature enabled.

- 1) Navigate to the **Projects Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within a particular project.
- 2) Select the **Detailed Finances** tab.
- 3) On the Main View, from the **Snapshot or Current** drop-down menu, select the snapshot you want to delete.
- 4) Click the **Snapshot** button and select **Delete**.

Modifying Financial Locks

Finance lock mechanism is used to indicate if the finances entered in the system have been validated and locked. The finance representative sets the lock month to indicate that the numbers below finance lock month should be considered as locked or Actual finances. Finance administrators have control over the financial lock month – this date is set globally through the administrator module. Any data prior to this date is locked and cannot be modified unless explicitly re-opened for a particular project. If you are the finance administrator, you can unlock a project's financial information.

To unlock a global finance lock:

- 1) Navigate to the **Project Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within the context of the project.
- 2) Select the **Settings** tab.
- 3) If you have the required permissions, you should be able to edit this page. Click the **Edit** button.
- 4) For the setting **Use Global Lock Month**, select **No**.
- 5) Click the **Update**.

To unlock project finances if a temporary global lock has been set:

- 1) Navigate to the **Project Finances** page by selecting **(Project #) > Go To > Finances**, or clicking the **Finances** link on the Left Navigation bar within the context of the project.
- 2) Select the **Settings** tab.
- 3) If you have the required permissions, you should be able to edit this page. Click the **Edit** button.
- 4) For the setting **Unlocked Locally (Global Lock Overridden)**, select **Yes**.
- 5) Click the **Update**.

Working with Finance Settings

You can view the project finance settings from the **Settings** tab on the **Project Finances** page. The top part of the page displays various finance settings for the project. The lower part of the page displays the finance categories based on the finance template selected when the project was created.

Finance Template: The finance template used in your project.

Finance Edit Mode: This is a read-only field. It shows the mode in which finances can be edited or tracked. This value is set in the finance template by your administrator.

Default Finance View: Select the default view for finances. You can choose from: **Actual**, **Plan**, **Forecast**, or **Budget**. The Forecast view shows Actuals up to the Forecast Cutoff month and Plan values for the months going forward. The Budget view shows the Budget snapshot. The Budget snapshot is taken when a project is created from a proposal, and will be blank if no proposal is used.

Finance Tracking Start Date: Select a date to start tracking finances.

How should shifting the Finance Tracking Start Date affect Financial Data?: If you have changed the finance tracking start date, select if you want to clear financial data for only the months which are no longer in the project, or shift the finance data based on the finance tracking start date.

Finance Tracking Months: Select the number of finance tracking months for your project. The default pre-filled value is the default number of months specified at the finance template level. You can only decrease the number of tracking months for a project if new value is greater than or equal to the default number of finance tracking months specified at the finance template level, and the new value does not remove any tracked months that already contain values.

Forecast Cutoff: This field sets the default cutoff date that is used as a separator between Actual values and Plan values. If you select **Finance Lock Month (from Actual)**, then all finance data prior to the finance lock month specified for the Actual view is pulled from Actual. If you select **Current Month**, then all finance data prior to this month is pulled from Actual.

Import Finances from MS Excel: Select if you want to import finances from MS Excel. Select from one of the following options:

- ▶ **Import MS Excel Finance Template From Admin :** Select this option if you want to import the MS Excel finance template associated with your finance template from the Administration module. This Excel could be different from the MS Excel template that is currently associated with this project.
- ▶ **Retain Existing MS Excel Finance Template on the Project :** Select if you want to keep the MS Excel Finance template associated with this project.
- ▶ **Upload a new MS Excel Finance Template:** Select this option if you want to upload a new MS Excel finance template.

Input for NPV, IRR and/or ROI: Select the categories or subcategories to be used in calculating each of these values.

Resource Computation: If set to **Yes**, the effort data flows from the activities or timesheets into the Project Finance Template. Set this to **No** if you want to import finances from MS Excel.

Use Global Lock Month: Select this option to use the global finance lock. If it is set to **No**, then project level finance lock month is used.

Global Lock Month: If the Use Global Lock Month selection is set to **Yes**, then this field will contain the global lock month. This field is not editable at the project level. Global lock month can be changed by finance administrators.

Local Lock Month: Select a local project lock month and year. This field is displayed only if the field **Use Global Lock Month selection** is set to **No**. Finance representatives will have to update project level lock month as they validate their projects so that realized/actual finances are reflected correctly in financial rollups.

All Months Locked Globally: If this field displays the value **Yes**, then global finance lock has been set by the finance administrator and financial data at project level cannot be updated.

Unlocked Locally (Global Lock Overridden): If the finances are locked by a temporary global lock and project finances need to be edited, finance administrators can override and unlock using this field.

Finance Element Types: Finance element types allow you to define various financial elements and assign a rate per unit for that element, for example, you could define an Element type called Man-Hours and assign it a rate of \$20 per unit. Entering element types allows you to use financial and non-financial inputs to calculate financial savings. You can also compute and override overtime and setup cost on a project level. The defaults are defined by the administrator, but can be modified from the **Setting** page by users with appropriate permissions.

The system allows you to apply multiplication factors for finance categories, for example, only 10% of all Working Capital may be counted as part of Savings. When entering data, users enter working capital numbers normally, but the system will rollup 10% of the total working capital on the Financial Summary page as well as in reports. Weighting factors (e.g., WACC, Working Capital Multiplication Factor, etc.) can be applied to numbers before cumulative totals are calculated.

Importing and Exporting Project Information

In This Section

Importing and Exporting Metrics	115
Importing and Exporting Financials	116
Exporting Project Data to Microsoft Project	117
Importing Project Data from Microsoft Project	118
Installing the plug-in	119

Importing and Exporting Metrics

EnterpriseTrack allows you to import and export metric data from and to Microsoft Office Excel (MS Excel). This functionality is meant for users who want to update their metrics data in MS Excel. You must first export the EnterpriseTrack framework of your metrics to MS Excel. You can then enter your data and keep track of your metrics data in MS Excel. When you are ready to bring all your metrics data into EnterpriseTrack you can use the Import feature on the Project Metrics page.

A series of steps have to be completed in sequence before you can import metrics data into the system. You can follow the steps outlined on the Export Metrics page. These steps are further explained below.

Installing the plug-in

Before you begin, you must install the EnterpriseTrack plug-in for Microsoft® Project. This has to be done only once per client machine.

- 1) Navigate to the *Project Import/Export* page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Show** button next to Downloads. Select the **Download EnterpriseTrack(TM) Plug-in for Microsoft MS Project Connector** link and save the file to your local drive.
- 3) Run the .exe file. This will install the plug-in on your machine. When you launch MS Project, you will see an **Oracle Instantis EnterpriseTrack** sub-menu under the **Tools** menu.

Exporting Metrics

For each project, the required project and metrics information must first be exported before the updated data can be brought back into EnterpriseTrack.

- 1) On the **Project Metrics** page click the **Export** button
- 2) On the **Export Metrics** page, locate the **Metrics Data File** link.
- 3) Right click on the link and select **Save Target As** from the menu.
- 4) Save the file to a directory. Oracle recommends that give the file a meaningful name, e.g., *metricsinfo_projectname.xml*.
- 5) Launch MS Excel on your machine. You should have installed the Plug-in.
- 6) In MS Excel select the **Import from EnterpriseTrack** option from the **Tools** menu.
- 7) A dialog box will ask you to locate the file to be imported.
- 8) Browse to your template file (e.g., *metricsinfo_projectname.xml*) and import it.
- 9) You can now update your metrics data in MS Excel.

Importing Metrics

Once you have updated the information in the metrics template using MS Excel, you can import it back into the EnterpriseTrack system.

- 1) Launch MS Excel on your machine. You should already have installed the plug-in on your machine.
- 2) In MS Excel, select the **Export to EnterpriseTrack** option from the **Tools** menu.

- 3) Save the file to a directory. Oracle recommends that give the file a meaningful name. E.g., *metricsdata_projectname.xml*
- 4) In your EnterpriseTrack system, navigate to the **Project Metrics** page within the appropriate project.
- 5) On the **Project Metrics** page click the **Import** button.
- 6) Scroll to the bottom of the Import project metrics page and click the Browse button. Locate the file (E.g., *metricsdata_projectname.xml*) and import it.
- 7) Your metrics data can now be viewed within EnterpriseTrack.

Note: You can use the Data Upload APIs to import multiple files at the same time. See EnterpriseTrack Integration API Reference Guide for more information.

Importing and Exporting Financials

EnterpriseTrack allows you to import and export financial data from and to Microsoft Office Excel (MS Excel). This functionality is meant for users who want to update their financial data in MS Excel. You must first export the EnterpriseTrack framework of your financial information to MS Excel. You will then enter your data and keep track of your metrics date in MS Excel. When you are ready to bring all your financial data into EnterpriseTrack you can use the Import feature on the **Project Financials** page.

Note: If you use the import/export feature for your financials, the financial information within EnterpriseTrack will be displayed in read-only format.

A series of steps have to be completed in sequence before you can import financial data into the system. You can follow the steps outlined on the **Export Financials** page. These steps are further explained below.

Installing the plug-in

Before you begin, you must install the EnterpriseTrack plug-in for Microsoft Project. This has to be done only once per client machine.

- 1) Navigate to the *Project Import/Export* page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Show** button next to Downloads. Select the **Download EnterpriseTrack(TM) Plug-in for Microsoft® MS Project® Connector** link and save the file to your local drive.
- 3) Run the .exe file. This will install the plug-in on your machine. When you launch MS Project, you will see an **Oracle Instantis EnterpriseTrack** sub-menu under the **Tools** menu.

Exporting the Financials file to MS Excel

For each project, the required project and financial information must first be exported before the updated data can be brought back into EnterpriseTrack.

- 1) On the **Project Financials** page click the **Export** button
- 2) On the **Export Financials** page, locate the **Financials Data File** link.

- 3) Right click on the link and select **Save Target As** from the menu.
- 4) Save the file to a directory. Oracle recommends that give the file a meaningful name, E.g., *financialinfo_projectname.xml*
- 5) Launch MS Excel on your machine. You should have installed the plug-in.
- 6) In MS Excel select the **Import financials from EnterpriseTrack** option from the **Tools** menu.
- 7) A dialog box will ask you to locate the file to be imported.
- 8) Browse to your template file (E.g., *financialinfo_projectname.xml*) and import it.
- 9) You can now update your financial data in MS Excel.

Exporting the Financials file to MS Excel

Once you have updated the information in the financials template using MS Excel, you can import it back into the EnterpriseTrack system.

- 1) Launch MS Excel on your machine. You should already have installed the plug-in on your machine.
- 2) In MS Excel, select the **Export to EnterpriseTrack** option from the **Tools** menu.
- 3) Save the file to a directory. Oracle recommends that give the file a meaningful name. E.g., *financialdata_projectname.xml*
- 4) In your EnterpriseTrack system, navigate to the **Project Financials** page within the appropriate project.
- 5) On the **Project Financials** page click the **Import** button.
- 6) Scroll to the bottom of the Import project financials page and click the Browse button. Locate the file (E.g., *financialdata_projectname.xml*) and import it.
- 7) Your financial data can now be viewed within EnterpriseTrack.

Note: You can use the Data Upload APIs to import multiple files at the same time. See EnterpriseTrack Integration API Reference Guide for more information.

Exporting Project Data to Microsoft Project

EnterpriseTrack allows you to export project data from and to Microsoft® Project. This functionality allows you to update your project data in MS Project. A series of steps have to be completed in sequence before you can export project data

Installing the plug-in

Before you begin, you must install the EnterpriseTrack plug-in for Microsoft® Project. This has to be done only once per client machine.

- 1) Navigate to the *Project Import/Export* page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Show** button next to Downloads. Select the **Download EnterpriseTrack(TM) Plug-in for Microsoft® MS Project® Connector** link and save the file to your local drive.

- 3) Run the .exe file. This will install the plug-in on your machine. When you launch MS Project, you will see an **Oracle Instantis EnterpriseTrack** sub-menu under the **Tools** menu.

Exporting Project Data

- 1) Navigate to the *Project Import/Export* page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Export Project data to Microsoft® Project** link.
- 3) Select the type of export you want to perform, **Read-Only Export** or **Lock Project and Export**.

A Read-Only export allows you to export the project to MS Project without having to import it back into EnterpriseTrack. If you lock a project, no changes can be made to the project. You can make changes only when the lock is released. The project lock status is displayed on the *Project Import/Export* page. If a project is On-Hold, you can only perform a Read-Only Export.

- 4) Click the **Read-Only Export** button or the **Lock Project and Export** button located at the top of the page.

You can open the exported file or save it to disk. When you open the file, it launches MS Project and opens the exported project file.

- 5) In MS Project you can make changes to the project data.

Importing Project Data from Microsoft Project

You can use the Import feature when you are ready to bring all your data into EnterpriseTrack. A series of steps have to be completed in sequence before you can import data into the EnterpriseTrack system.

Before you begin importing data, do the following:

- ▶ Ensure that you have a Microsoft Project template. This template is used when you export/import data from EnterpriseTrack.
- ▶ Check if you have downloaded the latest version of the EnterpriseTrack plug-in for Microsoft Project. For instruction on downloading the plug-in, see topic **Exporting Project Data to Microsoft Project** (on page 117).

To import data from Microsoft Project, do the following

- 1) Launch Microsoft Office Project on your machine.
- 2) In MS Project, select the **Export to EnterpriseTrack** option from the **Tools** menu. The plug-in saves the required data as a zipped XML file.
- 3) Save the file to a directory. Oracle recommends that give the file a meaningful name.
- 4) In your EnterpriseTrack system, navigate to the *Project Import/Export* page by clicking the **Import/Export** link within a particular project.
- 5) Click the **Import Project data From Microsoft® Project** link.
- 6) Check the *Release Project Lock* box to release the project lock and import. Leave the box unchecked if you do not want remove the lock.
- 7) Click the **Browse** button. Locate the file that you saved in step 3.

- 8) Click the **Import** button to begin the import process. A conformation message is displayed when the data is successfully imported. Your data can now be viewed within EnterpriseTrack.

Note: You can use the Data Upload APIs to import multiple files at the same time. See EnterpriseTrack Integration API Reference Guide for more information.




Installing the plug-in

Before you begin, you must install the EnterpriseTrack plug-in for Microsoft® Project. This has to be done only once per client machine.

- 1) Navigate to the *Project Import/Export* page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Show** button next to Downloads. Select the **Download EnterpriseTrack(TM) Plug-in for Microsoft® MS Project® Connector** link and save the file to your local drive.
- 3) Run the .exe file. This will install the plug-in on your machine. When you launch MS Project, you will see an **Oracle Instantis EnterpriseTrack** sub-menu under the **Tools** menu.

Associating Programs

To associate a project to a program:

- 1) From the **Project** listing page, select a project.
- 2) From the Project Basics page, click the **Edit**  button under the Associated Programs section, or select **Associated Programs** from the Left Navigation bar.
- 3) Click the **Associate Programs** button.
- 4) Select a program you want to associate with this project. To clear the program, delete the program name. You can use the **Filter**  icon to narrow your search.
- 5) Click **Add Program** to associate the project with additional programs. A new row is inserted.
- 6) Select additional programs. To clear a program row, click the **Trash**  icon.
- 7) Click **Update**.

Note: You must have the required permissions to associate a project to a program. You can associate a project to multiple programs only if the feature has been enabled by your administrator.

Working with Project Issues




Issues are unexpected problems or questions raised during a project that require a plan of action and resolution. Use the Issues page to identify, prioritize, monitor, and manage project issues. The issues you add are associated with a specific project, but are not tied to the project WBS. The ability to view and create issues is controlled by feature settings and permissions that are set by your Administrator.

When you create an issue, you can specify the priority, severity, category, owner, date, resolution and recommended action. When an issue is assigned to a user, a notification email is sent to that user. You can link to other roadmap activities and non-WBS activities, attach documents, and add notes to issues, if your administrator has enabled these options. The History tab allows you to view all changes that were made. You can also view, track, and monitor issues and their resolution by generating reports and dashboards.

You can view issues from several areas within EnterpriseTrack:

- ▶ **My Work, Status and Timesheets:** shows issues that are assigned to you.
- ▶ **Project Module Menu (Project #):** lists all issues associated with the project. From the Project Module Menu, select Go to > Issues.
- ▶ **Dashboards:** generates a dashboard based on your filter criteria. Use the Project Issues List, Project Activities List, or My Project Issues List dashboards.
- ▶ **Reports:** generates a report based on your filter and output criteria. Use the Project Issues, Non-WBS Activity Report, Project Status Report, or the Activity Detailed Report. Issues can also be added to Storyboard reports.

The following table shows the icons that are displayed on the Issues page, Issues Create page and the Issues Edit page:

Icon/Field	Description
Display Complete Form	Select this check box to view the entire form. No fields are hidden.
 Load My Settings	Click to load your saved layout. You can also click the menu arrow to load the layout specific to a profile or global. This option is available only if your administrator enabled it.
 Save My Settings	Click to save your layout. You can also click the menu arrow to save the layout to other profiles or global. This option is available only if your administrator has enabled it.
 Reset My Settings	Reset fields.
<input checked="" type="checkbox"/> Select Fields	Click to view the fields that are available on this page.

In This Section

Adding a New Issue	121
Updating Issues.....	122
Deleting Issues.....	122
Closing Issues.....	122

Adding a New Issue

To add a new issue to a project:

- 1) Select Project Module Menu (**Project #**) > **Go To** > **Issues**, or click the **Issues** link on the Left Navigation bar within a particular project.
- 2) Click **Add**.
- 3) Enter a name.
- 4) Enter a description.
- 5) Select a priority, severity, and category for this issue.
- 6) Enter the recommended action and resolution.
- 7) Select an owner for this issue.
- 8) Enter the date on which the issue is opened and the due date for resolving the issue.
- 9) Click the **Save**.
- 10) To add documents:
 - a. Select the **Documents** tab.
 - b. Click **Add Doc**.
 - c. Enter a name.
 - d. Click **Browse** and select a file from your local/network drive, or enter the document URL.
 - e. Click **Add Document**.
- 11) To add notes:
 - a. Select the **Notes** tab.
 - b. Click **Add Note**.
 - c. Select the note type.
 - d. Enter the text.
 - e. Click **Create**.
- 12) To add linked activities:
 - a. Select the **Links** tab.
 - b. Click **Add New**.
 - c. From the **Link Type** pull-down field, select the link type. The options you see are set by your administrator.
 - d. From the **Activity Type** pull-down field, select an activity type.
 - e. From the **Available Activities** list, click the select to select the activities you want to link to.

- f. Click **Add**.

Updating Issues

To update a project issue:

- 1) Select Project Module Menu **(Project #) > Go To > Issues**, or click the **Issues** link on the Left Navigation bar within a particular project.
- 2) Select an issue.
- 3) Click **Edit**.
- 4) Make the required changes.
- 5) Click **Save**.

Deleting Issues

To delete an issue:

- 1) Select Project Module Menu **(Project #) > Go To > Issues**, or click the **Issues** link on the Left Navigation bar within a particular project.
- 2) Select an issue.
- 3) Click **Delete**.
- 4) Click **Yes** to confirm the deletion.

Closing Issues

To close an issue:

- 1) Select Project Module Menu **(Project #) > Go To > Issues**, or click the **Issues** link on the Left Navigation bar within a particular project.
- 2) Select an issue.
- 3) Click **Edit**.
- 4) Change the status to **Completed**.
- 5) Enter the date on which the issue was closed.
- 6) Click **Save**.

Working with Project Risks




Project risks are any uncertain event or condition that can impact a project's objectives. Use the **Risks** page to identify, prioritize, monitor, and manage risks. The risks you add are associated with a specific project, but are not tied to the project WBS. The ability to create and view project risks is controlled by project level settings.

When you add a risk, you can specify the priority, severity, risk type, probability, impact, risk score, owner, date, resolution and recommended action. When a risk is assigned to a particular user, a notification email is sent to that user. You can link to other roadmap activities and non-WBS activities, attach documents, and add notes to risks, if your administrator has enabled these options. The History tab allows you to view all changes that were made. You can also view, track, and monitor risks and their resolution by generating reports and dashboards.

You can view risks from several areas within the application:

- ▶ **My Work and Timesheets:** shows risks that are assigned to you.
- ▶ **Project Module Menu (Project #):** lists all risks associated with the project. From the Project Module Menu, select **Go to > Risks**.
- ▶ **Dashboards:** generates a dashboard based on your filter criteria. Use the Project Activities List dashboard.
- ▶ **Reports:** generates a report based on your filter and output criteria. Use the Non-WBS Activity Report or the Activity Detailed Report.

The following table shows the icons that are displayed on the Risks page, Risks Create page, and Risks Edit page:

Icon/Field	Description
Display Complete Form	Select this check box to view the entire form. No fields are hidden.
 Load My Settings	Click to load your saved layout. You can also click the menu arrow to load the layout specific to a profile or global. This option is available only if your administrator enabled it.
 Save My Settings	Click to save your layout. You can also click the menu arrow to save the layout to other profiles or global. This option is available only if your administrator has enabled it.
 Reset My Settings	Reset fields.
<input checked="" type="checkbox"/> Select Fields	Click to view the fields that are available on this page.

In This Section

Adding a New Risk	124
Updating Risks	124
Deleting Risks	125
Closing Risks	125

Adding a New Risk

To add a new risk to a project,

- 1) Select Project Module Menu (**Project #**) > **Go To** > **Risks**, or click the **Risks** link on the Left Navigation bar within a particular project.
- 2) Click **Add**.
- 3) Enter a name.
- 4) Enter a description.
- 5) Select a priority, severity, risk type, probability, and impact for this risk.
- 6) Enter the risk score.
- 7) Enter the recommended action and resolution.
- 8) Enter the date on which the risk was opened and the due date for resolving the issue.
- 9) Click the **Save**.
- 10) To add documents:
 - a. Select the **Documents** tab.
 - b. Click **Add Doc**.
 - c. Enter a name.
 - d. Click **Browse** and select a file from your local/network drive, or enter the document URL.
 - e. Click **Add Document**.
- 11) To add notes:
 - a. Select the **Notes** tab.
 - b. Click **Add Note**.
 - c. Select the note type.
 - d. Enter the text.
 - e. Click **Create**.
- 12) To add linked activities:
 - a. Select the **Links** tab.
 - b. Click **Add New**.
 - c. From the **Link Type** pull-down field, select the link type. The options you see are set by your administrator.
 - d. From the **Activity Type** pull-down field, select an activity type.
 - e. From the **Available Activities** list, click the select to select the activities you want to link to.
 - f. Click **Add**.

Updating Risks

To update a project risk:

- 1) Select Project Module Menu **(Project #) > Go To > Risks**, or click the **Risks** link on the Left Navigation bar within a particular project.
- 2) Select a risk.
- 3) Click **Edit**.
- 4) Make the required changes.
- 5) Click **Save**.

Deleting Risks

To delete a risk:

- 1) Select Project Module Menu **(Project #) > Go To > Risks**, or click the Risks link on the Left Navigation bar within a particular project.
- 2) Select a risk.
- 3) Click **Delete**.
- 4) Click **Yes** to confirm the deletion.

Closing Risks

To close a risk:

- 1) Select Project Module Menu **(Project #) > Go To > Risks**, or click the Risks link on the Left Navigation bar within a particular project.
- 2) Select a risk.
- 3) Click **Edit**.
- 4) Change the status to **Completed**.
- 5) Enter the date on which the risk was closed.
- 6) Click **Save**.

Working with Project Metrics

EnterpriseTrack allows you to create metrics for each project and to input trackable data for each metric. The list of all available metric types is defined during configuration. The default primary metric type for a project is determined when a project is created. Secondary metrics can be created by users with the appropriate permissions. Metric Data can be tracked over time by entering data points at various time intervals.

In This Section

Adding a New Metric	126
Editing a Metric	126
Adding Metric Tracking Data	126
Importing and Exporting Metrics	127

Adding a New Metric

To add a new metric:

- 1) Navigate to the **Metrics** page by selecting Project Module Menu **(Project #) > Go To > Metrics**, or clicking the **Metrics** link on the Left Navigation bar within a particular project.
- 2) From the Project Metrics page, click the **Create** button.
- 3) On the Create New Metric page, enter the name of the metric and select the type of metric.
- 4) You can choose to make the new metric the primary metric. A project can only have one primary metric.
- 5) Each metric may have Baseline and Target values that are used when displaying metric data in a chart. Enter these values if required.
- 6) You can also select a tracking frequency (daily/monthly/weekly etc.).
- 7) Click **Save** to create the new metric.

Editing a Metric

- 1) To edit the details of a metric, navigate to the **Metrics** page by selecting Project Module Menu **(Project #) > Go To > Metrics**, or by clicking the **Metrics** link on the Left Navigation bar within a particular project.
- 2) Locate the metric you wish to modify and click the **Edit** link in the Action column.
- 3) You may update the metric name, change the metric type (e.g., DPMO, COPQ, etc.), set the tracking frequency (daily, weekly, monthly, etc.) and specify baseline and target values for the metric.
- 4) Make the necessary changes and click **Update** to save your changes.

Adding Metric Tracking Data

To enter metric tracking data:

- 1) Navigate to the **Metrics** page by selecting Project Module Menu **(Project #) > Go To > Metrics**, or clicking the **Metrics** link on the left navigation bar within a particular project.
- 2) Locate the metric for which you wish to add data and click the **[Data]** link in the Action column.
- 3) Select the date for which you are about to enter data.
- 4) Enter the data in the appropriate fields.

Note: The system will automatically advance the date to the next logical date for data entry based on the tracking frequency, for example, If the tracking frequency is 1 week and you enter data for Sept 1, the date is automatically advanced to Sept 8.

- 5) Click the **Add** button. The data will be displayed on the same page. You may edit or delete any metric data points as needed.
- 6) Click **Chart** to view the data as a graph.
- 7) Click **Done** to save your changes.

Importing and Exporting Metrics

EnterpriseTrack allows you to import and export metric data from and to Microsoft Office Excel (MS Excel). This functionality is meant for users who want to update their metrics data in MS Excel. You must first export the EnterpriseTrack framework of your metrics to MS Excel. You can then enter your data and keep track of your metrics data in MS Excel. When you are ready to bring all your metrics data into EnterpriseTrack you can use the Import feature on the Project Metrics page.

A series of steps have to be completed in sequence before you can import metrics data into the system. You can follow the steps outlined on the Export Metrics page. These steps are further explained below.

Installing the plug-in

Before you begin, you must install the EnterpriseTrack plug-in for Microsoft® Project. This has to be done only once per client machine.

- 1) Navigate to the *Project Import/Export* page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Show** button next to Downloads. Select the **Download EnterpriseTrack(TM) Plug-in for Microsoft MS Project Connector** link and save the file to your local drive.
- 3) Run the .exe file. This will install the plug-in on your machine. When you launch MS Project, you will see an **Oracle Instantis EnterpriseTrack** sub-menu under the **Tools** menu.

Exporting Metrics

For each project, the required project and metrics information must first be exported before the updated data can be brought back into EnterpriseTrack.

- 1) On the **Project Metrics** page click the **Export** button
- 2) On the **Export Metrics** page, locate the **Metrics Data File** link.
- 3) Right click on the link and select **Save Target As** from the menu.
- 4) Save the file to a directory. Oracle recommends that give the file a meaningful name, e.g., *metricsinfo_projectname.xml*.
- 5) Launch MS Excel on your machine. You should have installed the Plug-in.
- 6) In MS Excel select the **Import from EnterpriseTrack** option from the **Tools** menu.
- 7) A dialog box will ask you to locate the file to be imported.
- 8) Browse to your template file (e.g., *metricsinfo_projectname.xml*) and import it.
- 9) You can now update your metrics data in MS Excel.

Importing Metrics

Once you have updated the information in the metrics template using MS Excel, you can import it back into the EnterpriseTrack system.

- 1) Launch MS Excel on your machine. You should already have installed the plug-in on your machine.
- 2) In MS Excel, select the **Export to EnterpriseTrack** option from the **Tools** menu.

- 3) Save the file to a directory. Oracle recommends that give the file a meaningful name. E.g., *metricsdata_projectname.xml*
- 4) In your EnterpriseTrack system, navigate to the **Project Metrics** page within the appropriate project.
- 5) On the **Project Metrics** page click the **Import** button.
- 6) Scroll to the bottom of the Import project metrics page and click the Browse button. Locate the file (E.g., *metricsdata_projectname.xml*) and import it.
- 7) Your metrics data can now be viewed within EnterpriseTrack.

Note: You can use the Data Upload APIs to import multiple files at the same time. See EnterpriseTrack Integration API Reference Guide for more information.

Installing the plug-in

The EnterpriseTrack plug-in for Microsoft® Office Excel must be installed before you import the project data. This has to be done only once per client machine.

- 1) Navigate to the **Project Import/Export** page by selecting Project Module Menu (**Project #**) > **Go To > Import/Export**, or clicking the **Import/Export** link within the context of a project.
- 2) Click the **Download EnterpriseTrack(TM) plug-in for Microsoft® Office Excel** link and save the file to your local drive.
- 3) Run the .exe file. This will install the plug-in on your machine. When you launch MS Excel, you will see an **Oracle Instantis EnterpriseTrack** addition to the **Tools** menu.

Working with Project Statements and Notes

In This Section

Adding a New Note	128
Updating and Deleting a Project Note.....	129
Working with the Statement Generator Wizard.....	129

Adding a New Note

Notes can be added to any project and are meant to be used for additional explanations and clarifications.

To add a new project note

- 1) Navigate to the **Notes** page by selecting (**Project #**) > **Go To > Notes** from the Top Navigation bar, or by clicking the **Notes** link on the Left Navigation bar within a particular project.
- 2) Click the **Create** button.
- 3) Select the note type from the pull-down menu. Certain types of notes, like Executive Summary and Phase conclusion are available through the project reports.

- 4) Enter the text of the note.
- 5) Select a date for the note. You can type the date in the field or use the calendar.
- 6) Click **Save** to add the note.

Notes:

- The limit for the text box is 4000 bytes. Instead of very long notes, you may want to consider creating a new project document.
 - If your system is configured to have confidential notes, you will be able to make a note confidential. If you make a note confidential, you must also specify which members of the project team can view that note.
-

Updating and Deleting a Project Note

To update project notes:

- 1) Navigate to the **Notes** page by selecting **(Project #) > Go To > Notes** from the Top Navigation bar, or by clicking the **Notes** link on the Left Navigation bar within a particular project.
- 2) Click on the appropriate note.
- 3) Make the required changes.
- 4) Click **Update** to save your changes.

Deleting Notes

To delete a note:

- 1) Click on the name of the note.
- 2) Click the **Delete** button to delete the note.
- 3) Click **OK** to confirm the deletion.

Working with the Statement Generator Wizard

EnterpriseTrack can help you to create a well articulated problem or objective statement. In the **Statements and Notes** section of a proposal or project, certain fields may appear with the **Wizard** link next to them.

- 1) Click the Wizard link to launch the statement generator wizard.
- 2) Type your answer to each question posed by the wizard in the appropriate field. Be as specific as you can and let the sample answer guide you as you type.
- 3) Scroll to the bottom of the page. The top field e.g. **Generated Opportunity or Problem Statement field** will display the statement.
- 4) Click the **Copy** button to copy it to the bottom field for editing.

- 5) To use the statement, click the **Apply** button.

Working with Project Reports

EnterpriseTrack allows the project team to download project specific reports within the context of a project. These reports summarize and aggregate various pieces of project information. Within a project, you can run the following reports:

- ▶ **Control Plan Report:** Shows all the tasks that were marked as control plan task types.
- ▶ **Executive Summary Report:** Displays all the notes of the project that are of type Executive Summary.
- ▶ **Final Report:** Displays various elements of the proposal as well as summary project information like cycle time, finances etc.
- ▶ **Financial Detail Report:** Displays a print-friendly version and enables a comma-separated-values export of all detailed finance data entered in the finance section.
- ▶ **Financial Plan Vs Actual Report:** Compares the finance data snapshot taken when a project is closed (i.e. when the project moves into realization) with the finance data at the current time (i.e. when the report is run).
- ▶ **Issues Report:** Lists all the issues within the project.
- ▶ **Notes Report:** Lists all notes entered as part of the project.
- ▶ **Proposal Report:** Displays a print friendly version of the project proposal.
- ▶ **Review Report:** Displays the status of the tasks and deliverables associated with the project.
- ▶ **Storyboard Report:** Allows you to export a Storyboard to Microsoft PowerPoint. For more information on generating this report, see topic Exporting a Storyboard to Microsoft PowerPoint.

In This Section

Running Project Reports.....	130
Exporting a Storyboard to Microsoft PowerPoint.....	131

Running Project Reports

To run project reports:

- 1) Navigate to the **Reports** page by selecting **(Project #) > Go To > Reports**, or by clicking the **Reports** link on the Left Navigation bar within a particular project.
- 2) Click **Run** next to report you want to generate.

Exporting a Storyboard to Microsoft PowerPoint

In EnterpriseTrack, you can export all relevant project data to a Microsoft PowerPoint file to create PowerPoint presentations. The data you export is formatted and presented based on the styles defined in your storyboard template. The available templates are selected by your company's administrator. You can either create a summary or detailed storyboard report. You can also select the content you want displayed, the order it gets displayed, and if you want to include section dividers in the final presentation.

Installing the Plug-in for Microsoft PowerPoint

To export project data, you must first install the EnterpriseTrack plug-in for Microsoft PowerPoint. This is required only when you run the report for the very first time. Follow the steps below only if you have not already installed the Oracle Instantis EnterpriseTrack Microsoft Office PowerPoint Connector.

- 1) Navigate to the **Reports** page by selecting **(Project #) > Go To > Reports**, or by clicking the **Reports** link on the Left Navigation bar within a particular project.
- 2) Click the **Run** link next to Storyboard Report.
- 3) Click **Download Setup** to get the latest version of the Oracle Instantis EnterpriseTrack Microsoft Office Power Point Connector.
- 4) Click **Run** and follow the set up instructions to install the connector.

Exporting Project Data to MS PowerPoint

Once you have installed the connector, you can begin exporting a storyboard to PowerPoint.

To export a storyboard:

- 1) From the **Project Reports** page **(Project #) > Go To > Reports**, click the **Run** link next to Storyboard Report. You can also generate storyboards from the main Reports page (**Go To > Reports**).
- 2) From the Set Storyboard Report Options page, select the type of storyboard you want: **Summary Storyboard** or **Detailed Storyboard**.
- 3) From the Available Content box, select a component and click on the right arrow to include it in your storyboard output. To select multiple components hold down the Shift button and press the right arrow. You can also double-click an item to select it.
- 4) From the Selected Content box, select the order of components. Use the **Up** and **Down** buttons to move the order of components on the list. The order of items determines the order of content in the PowerPoint Storyboard output.
- 5) From the PowerPoint Template drop-down menu, select a template that your storyboard will use.
- 6) Select the **Include Section Dividers** check box to have dividers between sections in your storyboard output. Deselect the check box to exclude section dividers from the output.
- 7) Click **Run Report**.
- 8) Click **Run** to create the storyboard right away. Click **Save** to create it at a later time. If you are saving the file, Oracle recommends that give the file a meaningful name, E.g., StoryboardData_projectname.etz. To create a storyboard from a saved file, double click the file.

Working with Status Reports

EnterpriseTrack makes it easy for you to create periodic status reports for each of your projects. You can simply save a status report or you may be required to submit the report to a manager or supervisor periodically for approval.

In This Section

Creating a Status Report	132
Copying Status Reports.....	132
Approving Status Reports.....	133

Creating a Status Report

To create a status report:

- 1) Navigate to the **Status Reports** page by selecting **(Project #) > Go To > Status Reports**, or by clicking the **Status Reports** link on the left navigation bar within a particular project.
You can also create a status report from your **My Work** page. Select **Create Status Report** under the **Action** column next to the project name.
- 2) Select **Create > New Status Report**.
- 3) On the Create Status Report page, complete the fields that are editable. The system automatically generates some pre-selected information about the project for your report.
- 4) Click **Save** to save your changes, or click **Submit For Approval** to send it to your manager or supervisor for approval.

Notes:

- The sections you see on your status report are configured by your administrator. The Risk and Issues sections are displayed only if they have been enabled on your project and if they were configured by your administrator.
 - The finance section displays, the Plan, Actual, and Forecast values if your project uses double-view finance templates and Locked and Total values for projects using single-view finance templates.
-

Copying Status Reports

When you copy a status report, the system populates the following sections and fields with information from the most recent status report:

- ▶ Finance section: Comments field
- ▶ Key section: Status and Explanations fields
- ▶ Report section: All fields

Note: You can copy status reports only if this feature was enabled by your administrator and if the frequency setting of the latest report and the current frequency setting are the same.

- 1) Navigate to the **Status Reports** page by selecting **(Project #) > Go To > Status Reports**, or by clicking the **Status Reports** link on the left navigation bar within a particular project.
- 2) Select **Create > Copy of Latest Report**. You can also select **Manage > Copy** when viewing the latest status report.

Approving Status Reports

If you are a manager, your responsibilities may include approving status reports. To begin working with status reports, click the **Status Report** sub-menu within the Projects menu in the Left Navigation bar, or by selecting **(Project #) > Go To > Status Report**.

- 1) From the Quick Filters pull-down menu, select the **Status reports Submitted for my Approval** option.
- 2) You will see a list of all the status reports that need to be approved.
- 3) Select the status report by clicking the **[View]** link in the Action column.
- 4) From the **Manage** drop-down menu, select **Approve**. Select **Reject** to send a status report back to the submitter for modification.

Notes:

- An email will be sent to the user when a status report is approved or rejected.
 - Status Reports are also displayed in your **My Work** page. To approve a status report from your My Work page, click **Approve** in the **Next Action** column for the the status report you want to approve. The list is displayed in Pending Approvals: Project Status Reports.
-

Working with Project Resources

In This Section

Assigning Resources to a Project.....	134
Re-assigning a Team Member to a Role	135
Edit Team Member Information	135
View Rate Change History	136
Using the EnterpriseTrack Email client	136
Using an External Email Client	137
Managing Your Team Picture	137
Deleting a Team Picture	137
Working with Resource Assignments	137
Create Request for Resource Allocation.....	138
Edit a Resource Allocation Request	139
Withdraw a Request for Resource Allocation.....	140
Reopen Resource Allocation Request.....	140
Release Project Resource Allocation.....	140
View a Team Member's Calendar.....	141

Assigning Resources to a Project

The term *resource*, within EnterpriseTrack refers to a person or equipment. The resources you assign to your project must already be part of your company's resource pool. In the *Project Role* field you can specify if the resource is an external team member, or equipment. External team members can receive email notifications but cannot log into the system.

You can view the Available Free Capacity for a resource from the *Allocation Review* section. This section is updated based on the dates, duration and the required effort you select. If it is highlighted in red, then this resource is over-booked for the selected time period; if it is highlighted green then this resource is available for the selected time period. You can also view all committed allocations for this resource by clicking the link **Previously Committed Capacity**.

Notes:

- The fields and options you see are based on the project initiative you selected, and on the settings set by your Administrator.
- The system currency is the default currency for a resource.

To assign a resource to your project:

- 1) Navigate to the *Project Resources* page **(Project #)> Go To> Resources > Listing** or click the **Resources** link on the Left Navigation Bar within a particular project.
- 2) From the **Create** menu select **Team Member**. The *Add a Team Member* screen is displayed.
- 3) Select a role from the drop-down list.
- 4) If you selected **Team Member External**, enter the first name, last name and email address.
- 5) Select a resource from the drop-down list.


- 6) Select the duration.
 - ▶ Choose **Entire Project**, or **Partial Project**.
 - ▶ If you select **Partial Project**, click the **Calendar** icon to select the start and end dates.
- 7) Specify the effort/utilization for this resource. You can choose from the following options:
 - ▶ Select **Percentage Utilization** and enter the percentage of the resource's time that will be spent on this project.
 - ▶ Select **Plan Effort (0)** if you want to plan the effort for each week. Click the **Add** button to display the *Add Efforts* screen. Enter the number of hours for each week and click the **Add Efforts** button.
 - ▶ Select **Plan Effort Total** if you want to enter the total number of hours you will require from this resource.
- 8) Choose if you want to use the **Resource Rate** or the **Role Rate**.
- 9) Select **Override Labor Rate** only if you want to overwrite the current labor rate for this resource.
 - ▶ Click the **Calendar** icon and select the effective start date.
 - ▶ Enter the Standard Labor Rate (per hour).
 - ▶ Enter the Overtime Labor Rate (per hour).
 - ▶ Enter the Setup Labor Rate.

Note: *You must have the Override Team Member Rate permission to override the current labor rates.*

- 10) Enter the time this resource will spend on various project related tasks (Project Management, Team Meetings, etc.).
- 11) Click the **Create** button.

Re-assigning a Team Member to a Role

To change the team member assigned to a specific project role, do the following:

- 1) Navigate to the **Project Resources** page by selecting **(Project #)> Go To> Resources > Listing** or by clicking the **Resources** link on the Left Navigation Bar within a particular project. The Project Resources page is displayed.
- 2) Click on the appropriate Project Role and select  **>Edit**.
- 3) From the **Possible Choices** drop-down list, select an user who is to be assigned to the selected role
- 4) Click **Update** to save your changes.


Edit Team Member Information

You can use the **Edit Team Member Info** page to change the resource currently assigned to a role and to override the current labor rate.

Notes:


- You must have the **Modify Team Member Rate** and **Override Team Member Rate** permissions to modify the current labor rates.
 - If the finance lock is set to **Strict**, you cannot change or override labor rates for closed (locked) financial periods.
-

To edit a team member's information:

- 1) Navigate to the **Project Resources** page (**Project #**)> **Go To> Resources > Listing** or click the **Resources** link on the Left Navigation Bar within a particular project.
- 2) Locate the resource you want to edit and select  > **Edit**.
- 3) From the **Possible Choices** pull-down menu, select a resource.
- 4) Select **Override Labor Rate** only if you want to overwrite the current labor rate for this resource.
 - ▶ Click the **Calendar** icon to change the effective start date. Edit the standard, overtime, or setup labor rates.
Or
 - ▶ Click the **[Add Row]** link to add a new row. Click the **Calendar** icon to select the effective start date. Enter the standard, overtime, and setup labor rates.
- 5) Click the **Update**.

View Rate Change History

To view a detailed list of rate changes associated with a resource:

- 1) Navigate to the **Project Resources** page (**Project #**)> **Go To> Resources > Listing** or click the **Resources** link on the Left Navigation Bar within a particular project.
- 2) Locate the resource you want to edit and select  > **Edit**.
- 3) Click the **[View Rate Change History]** link.

Note: You must have the **View Team Member Rate and Activity Cost** permission to view labor rates.

Using the EnterpriseTrack Email client

To email a team member from within EnterpriseTrack:

- 1) Navigate to the **Project Resources** page by selecting (**Project #**) > **Resources**, or by clicking the **Resources** link on the Left Navigation bar within a particular project.
- 2) Click the **Send Email** button.
- 3) Compose your email in the Send Email window.
- 4) Either type email addresses into the **To** field or select names from a list.

- 5) To use the list, click on the require names in the **Select Team Members** field and click the **To** button. The name will be added to the **To** field. Multiple names can be added to the **To** field.
- 6) To attach files to the email, enter a complete path to the file in the **Attachment** field or use the **Browse** button to locate your file.
- 7) When you are ready to send your email, click the **Send Email** button.

Using an External Email Client

To send an email to a team member using an email client outside EnterpriseTrack:

- 1) Navigate to the **Project Resources** page by selecting **(Project #) > Resources**, or by clicking the **Resources** link on the Left Navigation bar within a particular project.
- 2) The email address of each member is displayed on the Team Member page.
- 3) Click the appropriate email address. A compose email window in your email client will be opened.
- 4) Follow your email client's conventions to send the email.

Managing Your Team Picture

You can add a team picture to your Project.

- 1) Navigate to the **Project Resources** page by selecting **(Project #) > Resources**, or by clicking the **Resources** link on the Left Navigation bar within a particular project.
- 2) From the **Edit** menu, select **Team Picture** .
- 3) Click the **Browse** button to point to the appropriate location of the picture.
- 4) Click the **Update** button. The picture is uploaded and displayed on the **Team Members** page.

Deleting a Team Picture

- 1) Navigate to **Project Resources** page by selecting **(Project #) > Resources**, or by clicking the **Resources** link on the Left Navigation bar within a particular project.
- 2) From the **Edit** menu, select **Team Picture**.
- 3) Select the **Delete** check-box and select **Update**. The Project Team page is redisplayed with the team picture removed.

Working with Resource Assignments

EnterpriseTrack allows you to view the resource assignments of all the team members within a project. You can view the list of proposals and projects that each team member is associated with. You can also view the Gantt Chart as well as a Utilization chart for each user.

The Assignments page displays the following information:

- ▶ Name, resource type (person, equipment, etc.), system access profile, manager (if any) and the email address of the user.

- ▶ **Total Available Hours:** The system looks at the current work load of the user, and any workload in the pipeline and based on those numbers gives you the total available hours for a user.
- ▶ **Workload on projects:** This is based on the number of hours assigned to the user for projects that are already in progress. You can see the number of hours as well as a diagrammatic representation of the percentage utilization of the user. Place your cursor on the bar graph to view the actual numbers.
- ▶ **Workload in pipeline:** This is based on the number of hours assigned to the user in proposals that are currently active. You can see the number of hours as well as a diagrammatic representation of the percentage utilization of the user. Place your cursor on the bar graph to view the actual numbers.
- ▶ **Total Workload:** Workload on projects + workload in pipeline.

To view the resource assignments of team members of a project,

- 1) Navigate to the **Project Resources** page by selecting **(Project #) > Resources**, or by clicking the **Resources** link on the Left Navigation bar within a particular project.
- 2) Click the **Assignments** tab to view the assignments associated with each user.
- 3) Click the **Gantt Chart** tab to view the Gantt chart for each user
- 4) Click the **Utilization Chart** tab to view a utilization chart for each user.
- 5) Click **Done** to return to the **Project Resources** page.

Create Request for Resource Allocation


You can create allocation requests for resources already on your project team. Based on the dates and duration you selected, the Allocation Review section shows the impact this allocation will have on the resource.

When you submit the allocation request, it is sent for approval. You can view the status from the **Resource Plan** tab on the Project Resources page.

Notes:

- The fields and options you see are based on the project initiative you selected, and on the settings set by your Administrator.
 - The system currency is the default currency.
-


To create an allocation request:

- 1) Navigate to the **Project Resources** page **(Project #)> Go To> Resources**.
- 2) Select the **Resource Plan** tab.
- 3) From the **Create** menu, select **Allocation**, or select  **> Add Allocation**. The *Create Request For Resource Allocation* page is displayed.
- 4) Select a role from the drop-down list.
- 5) Select the duration.
 - a. Choose **Entire Project**, or **Partial Project**.

- b. If you select **Partial Project**, click the **Calendar** icon to select the start and end dates.
- 6) Specify the effort/utilization for this resource. You can choose from the following options:
 - a. Select **Percentage Utilization** and enter the percentage of the resource's time that will be spent on this project. The default value is specified by your Administrator.
 - b. Select **Plan Effort (0)** if you want to plan the effort for each week. Click the **Add** button to display the *Add Efforts* screen. Enter the number of hours for each week and click the **Add Efforts** button.
 - c. Select **Plan Effort Total** if you want to just enter the total number of hours you will require from this resource.
- 7) Select if you are flexible on dates and effort. If this option is selected, the approver can modify the dates and effort before approving your request.
- 8) Select a preferred resource from the list.
- 9) Select if you are flexible on preferred users. If this option is selected, the approver can modify the preferred users before approving your request.
- 10) Choose the *Area of Expertise* if these parameters are used in your system.
- 11) Choose the *Approver Identification Tag* if this parameters is used in your system.
- 12) Click **Submit for Approval** to send the allocation request for approval, or click **Save** to save changes and not submit for approval.

Edit a Resource Allocation Request


To edit a resource allocation request:

- 1) Navigate to the Resources page by selecting Project Module Menu (**Project #**)> **Go To > Resources** or by clicking the **Resources** link on the Left Navigation Bar within a particular project.
- 2) Select the **Resource Plan** tab.
- 3) Select a resource allocation and select  > **Edit**. The *Edit Request For Resource Allocation* page is displayed.
- 4) Edit the duration.
 - a. Choose **Entire Project**, or **Partial Project**.
 - b. If you select **Partial Project**, click the **Calendar** icon to select the start and end dates.
- 5) Edit the effort/utilization for this resource. You can choose from the following options:
 - a. Select **Percentage Utilization** and enter the percentage of the resource's time that will be spent on this project. The default value is specified by your Administrator.
 - b. Select **Plan Effort (0)** if you want to plan the effort for each week. Click the **Add** button to display the *Add Efforts* screen. Enter the number of hours for each week and click the **Add Efforts** button.
 - c. Select **Plan Effort Total** if you want to just enter the total number of hours you will require from this resource.
- 6) Click **Save**.

Note: You can edit resource allocation requests and modify effort utilization only if the resource allocation has not been submitted. To edit a submitted request you must first withdraw the request.


Withdraw a Request for Resource Allocation

To withdraw a request for resource allocation:

- 1) Navigate to the Resources page by selecting Project Module Menu **(Project #)> Go To > Resources** or by clicking the **Resources** link on the Left Navigation Bar within a particular project.
- 2) Select a resource allocation and select  **> Withdraw**.
- 3) A pop up window appears; click **OK** to withdraw the allocation request.

Reopen Resource Allocation Request

To reopen a previously denied resource allocation request, do the following:

- 1) Navigate to the Resources page by selecting Project Module Menu **(Project #)> Go To > Resources** or by clicking the **Resources** link on the Left Navigation Bar within a particular project.
- 2) Select a resource allocation and select  **> Reopen**.
- 3) A pop up window appears; click **OK** to reopen the allocation request.

Release Project Resource Allocation

You can release a project resource allocation after the resource allocation has been approved. You can choose to release for the entire duration or for a partial duration of the project.

Note: You must have appropriate permissions to release a resource allocation.

To release a resource allocation, do the following:


- 1) Navigate to the Resources page by selecting Project Module Menu **(Project #)> Go To > Resources** or by clicking the **Resources** link on the Left Navigation Bar within a particular project.
- 2) Select a resource allocation and select  **> Release**.
- 3) Select if you want to release the allocation for the entire duration or release the allocation for a partial period.
- 4) Enter the modified allocation dates by clicking on the **Calendar** icon, if you selected to release partial allocation.

- 5) A list of activities is displayed if they were assigned to this resource. You have the option to unassign all activities associated with the resource by checking the **Unassign** box.
- 6) Enter a reason for releasing this project resource allocation.
- 7) Click the **Release**.

Note: Only Project Managers with appropriate permissions can unassign activities.

View a Team Member's Calendar

To view a team member's calendar:

- 1) Navigate to the *Project Resources* page (**Project #**) **Go To > Resource > Listing**.
- 2) Select a resource and click  **> Select**. The Details page is displayed.
- 3) Select the **Calendar** tab.

Note: You must have the **View All Resource Calendars** permission to view other resource calendars.

Working with Project Settings

In This Section

Working with Email Project Settings	141
Working with Percent Completion Settings	142
Using Timesheet Settings.....	143
Selecting Non-WBS Activity Types.....	143

Working with Email Project Settings

EnterpriseTrack periodically sends out informational and warning email messages to its users. The recipients and the subject of these email messages are determined by your administrator, but can be over written at the project level by users who have the permission to do so.

To edit the email settings, navigate to the **Settings** page by clicking the **Settings** link on the Left Navigation bar, or select (**Project#**) **> Go To > Settings** within a particular project.

- 1) On the Project Settings page you will see the list of email notifications that have been configured for your system
- 2) Click the **Edit** link in the Action column of the appropriate Email Notification.
- 3) On the **Edit Email** page, select the check box to enable the notification. Uncheck the box to disable it.

- 4) To modify the To, CC and Bcc addresses, click in the appropriate field and select the roles from the **Email list** menu on the right. You can select multiple entries by holding down the **Ctrl** key on your keyboard. You can also select the roles one at a time; just separate the values with a comma.
- 5) To edit the Email subject, type the required text in the field.
- 6) Click the **Update** button to save your changes.

Working with Percent Completion Settings

Use the **Percent Completion Settings** page to select how you want EnterpriseTrack to calculate the percent complete for a project. You can choose manual mode and enter the percentage complete for each activity under the **Roadmap** page, or have the system calculate the completion percentage using activity count, effort, or duration. If any one of the following option is chosen, the system will calculate the percent completion as follows:

- ▶ Count Based (Completed vs Total Count for Immediate Children): The total number of completed activities by the total number of immediate children.
- ▶ Count Based (Completed vs Total Count for All Children): The total number of completed activities by the total number of all children.
- ▶ Effort Based Calculation (Actual vs Planned Effort For Immediate Children): The actual effort by the planned effort of all top-level tasks.
- ▶ Effort Based Calculation (Actual vs Planned Effort For All Children): The actual effort by the sum of the planned effort of all tasks.
- ▶ Effort Based Calculation (Planned Completed vs Total Planned Effort For Immediate Children): The planned completed effort by the total planned effort of all top-level tasks.
- ▶ Effort Based Calculation (Planned completed vs Total Planned Effort For All Children): The planned completed effort of all children by the total planned effort of all children.
- ▶ Duration Based (Actual vs Planned Duration for Immediate Children): The sum of the actual duration of all immediate children by the sum of all planned duration of immediate children.
- ▶ Duration Based (Actual vs Planned Duration for All Children): The sum of the actual duration of all children by the sum of all planned duration of all children.
- ▶ Duration Based (Planned Completed vs Total Planned Duration for Immediate Children): The sum of the actual duration of all immediate children by the sum of all planned duration of immediate children.
- ▶ Duration Based (Planned Completed vs Total Planned Duration for All Children): The sum of the actual duration of all children by the sum of all planned duration of all children.

To change the criteria based on which the percentage completion is calculated for a project:

- 1) From the Top Navigation Bar, select **(Project#) > Go To > Settings**, or select the **Settings** link on the Left Navigation Bar. The current setting is displayed in the **Percent Completion Type** column.
- 2) Click the **[Edit]** link.
- 3) Select the new percent completion type.
- 4) Click **Save**.

Using Timesheet Settings

As a Project Manager, you can set timesheet settings for each individual project you manage. These settings allow you to:

- ▶ Enable the Estimated Time to Complete (ETC) field.
- ▶ Set ETC as a mandatory field while completing timesheets.
- ▶ Specify the allowed grace period for timesheet reporting.

To specify timesheet settings:

- 1) Navigate to the *Project Settings* page by clicking **(Project#) > Go To > Settings** within a particular project, or select the **Settings** link on the Left Navigation Bar.
- 2) Click the **[Edit]** link next to *Timesheets*. The *Timesheet Settings* page is displayed.
- 3) Choose if you want to enable ETC.
- 4) Choose if you will require team members to enter the ETC for activities before submitting their timesheet.
- 5) Specify how many days before the activity start date can team members start reporting effort.
- 6) Specify how many days past the activity completion date can team members continue to report effort.
- 7) Click **Save**.

Note: If an activity has AET set to **Timesheet** and it does not have a closed date or a plan start date, then it is always available in Timesheets for reporting.

Selecting Non-WBS Activity Types

You can select the following Non-WBS activities: Issue, Risk, Change Request, Discussion and External_WA to include in each project. These activities are associated with a project, but are not part of the project roadmap. They are enabled on a per project basis.

To include Non-WBS activities in a project:

- 1) From the Top Navigation Bar, select **(Project#) > Go To > Settings**, or select the **Settings** link on the Left Navigation Bar.
- 2) Click the **[Edit]** link next to Activity Types.
- 3) Select the Non-WBS activities you want to use in your project.
- 4) Click **Save**.

Programs

In This Section

Working with Programs	144
Creating a New Program	144
Viewing and Printing Program Details	145
Viewing Financial Information for a Program	146
Editing Program Evaluation Values	147
Editing a Program.....	147
Deleting a Program	148
Working with Program Non WBS Activities.....	148
Working with Program Issues	150
Working with Program Risks	153
Working with Program Documents	155

Working with Programs

EnterpriseTrack allows you to group multiple projects and proposals under the umbrella of a program to report on program level parameters (E.g. Financial data).

You can get a bird's eye view of the programs, the participating divisions, a count of the number of projects and proposals that make up a particular program and the net forecast and realized savings. You can view the details of the program by clicking on the program name. You can further drill down to view the details of each project and proposal linked to a program by clicking on the appropriate project or proposal names. You can also track the fields that were modified on the Program Basics page. For more information, see topic **Viewing Field History** (on page 23).

Using the Program Listing Page

To view the Program Listing page, from the Top Navigation bar select **Go To > Programs**, or select **Programs** from the Left Navigation bar.

The Program Listing page shows a list of programs that are returned from a default saved search. For more information on changing the returned search, see topic **Advanced Search and Saved Searches** (on page 20). For more information on personalizing your listing page, see topic **Personalizing the Listing Pages** (on page 21).

Creating a New Program

To create a new program:

- 1) From the Top Navigation bar, select **Create New > Program**; or from the Left Navigation bar, select the **Programs** links and from the Program listing page, click **Create**.
- 2) Enter a name for the program.

- 3) Enter the required fields under the Basic Details, Organization, Program Budget, Date, Program Custom Fields, and Statement and Notes sections. The finance categories displayed in the Program Budget section correspond to the categories that are enabled in the default global finance template.
- 4) If a program evaluation matrix is configured by your administrator, select a matrix.
- 5) Select proposals to associate with a program. This option is available only if your administrator has enabled the feature to associate proposals to a project. From the **Available Proposals** list, select a proposal and click the right arrow button to add it to the **Associated Proposals** list. You can also use the **Filter** link to narrow down the list of available proposals. To remove a proposal from this program, select it in the **Associated Proposals** list and click the left arrow button.
- 6) Select the projects associated with the program. From the **Available Projects** list, select a project and click the right arrow button to add it to the **Associated Projects** list. You can also use the **Filter** link to narrow down the list of available projects. To remove a project from this program, select it in the **Associated Projects** list and click the left arrow button.
- 7) Click **Create**.

Note: You can associate multiple proposals and projects to a program only if it has been enabled by your administrator.

Tips:

- ▶ Select the **Auto Fill** button to auto fill the organizational hierarchy based on the information stored in your user profile.
- ▶ Select the **Program Field Help** link to read your company's guidelines for completing the statements and notes section of the program.
- ▶ You can associate a strategy with this program only in **Edit** mode. You must have the required permissions to associate a strategy to a program. You can associate a strategy to multiple programs only if the feature has been enabled by your administrator.

Viewing and Printing Program Details

View Program Details

- 1) Click the **Programs** link in the Left Navigation bar, or select **Go To > Programs** from the Top Navigation bar.
- 2) From the Programs listing page, select the Program you want to view. From the Program Basic page you can view the program details. The Basic Details, Organization, Program Budget, Program Custom Fields, Strategy, Statement and Notes, Associated Proposals, and Associated Projects sections are displayed on the Program Basics page.

Program Budget

The following fields are displayed in program Budget section:

- ▶ **Program Budget (Total):** The total program budget. The total is calculated based on the values entered in the program finance fields and the definitions for the categories in the global finance template.
- ▶ **Proposal Budget (Total):** The total budget of all the proposals. It excludes proposals that have the status as Rejected.
- ▶ **Project Forecast View (Total):** The sum of the forecast view column in the Projects section. It excludes projects that have the status **Canceled**. This field is applicable only if your project uses the double view finance template. For single view projects, this field is not applicable.
- ▶ **Actual/Basic View (Total):** The sum of the Actual/Basic column in the Project section. It is a total of all project finances, locked and unlocked. For projects using the single view finance template, it includes all finances locked and unlocked. For projects using the double view finance template, it includes the Actual view locked and unlocked. It excludes projects that have the status **Canceled**.
- ▶ **Actual/Basic View (Locked):** The sum of the Actual/Basic column in the Project section. It is a total of all locked project finances. For projects using the single view finance template, it includes all locked finances. For projects using the double view finance template, it includes the Actual locked finances. It excludes projects that have the status as Canceled.
- ▶ **Variance from Actual/Basic View (Locked):** The Program Budget (Total) minus the Actual/Basic View (Locked).
- ▶ **All Financials in USD:** All finances in USD.

Program Dates

The following fields are displayed in the Dates section:

- ▶ **Planned Start Date:** The planned start date for the program.
- ▶ **Planned Completion Date:** The planned completion date for the program
- ▶ **Actual Start Date:** The actual start date for the program.
- ▶ **Actual Completion Date:** The actual completion date for the program.

Print Program Details

- 1) Select a program from the Program listing page.
- 2) From the **Program Basics** page, click **Print**.

Tip:

You can also access the Program Basics page by selecting **Program # > Go To > Basics**, or clicking the **Basics** icon on the Left Navigation Bar.

Viewing Financial Information for a Program

The finance section shows a monthly breakdown of savings and costs (from the first month of the earliest project to the last month of the latest project) and allows drill down into the component projects that contribute to the totals for that month.

- 1) To view the financial details for a program, select the name of the program in the **Programs** page.

- 2) From the Program Basics page, click on the **Finance** link within **Programs** on the Left Navigation bar, or select **Go To > Programs > Finance** from the Top Navigation bar.
- 3) Select the fiscal year to view the financial data for that year.

Editing Program Evaluation Values

To edit a program evaluation values:

- 1) Click the **Programs** link in the Left Navigation bar.
- 2) From the Programs listing page, select the Program you want to edit.
- 3) On the **Program Basics** page, click **Edit**.
- 4) Update the evaluation criteria values. Note, you cannot change the impact weight.
- 5) Click **Save**.

Note: You must have the required permissions to edit the program evaluation values.

Editing a Program

To edit a program:

- 1) Click the **Programs** link in the Left Navigation bar, or select **Go To > Programs** from the Top Navigation bar.
- 2) From the Programs listing page, select the Program you want to edit.
- 3) On the **Program Basics** page click the **Edit** button.
- 4) Make the required changes.
- 5) Update the status of your program. You can select from one of the following options: **Active**, **On Hold**, **Completed**, or **Canceled**.
- 6) If Strategies/alignments are enabled, click the **[Add Alignment]** link to add a strategy/alignment to associate with this program.
 - a. Select a strategy node and enter the % contribution.
 - b. Click **Save**.
- 7) Modify the proposals associated with the program. From the **Available Proposals** list, select a proposal and click the right arrow button to add it to the **Associated Proposals** list. You can also use the **Filter** link to narrow down the list of available proposals. To remove a proposal from this program, select it in the **Associated Proposals** list and click the left arrow button.
- 8) Modify the projects associated with the program. From the **Available Projects** list, select a project and click the right arrow button to add it to the **Associated Projects** list. You can also use the **Filter** link to narrow down the list of available projects. To remove a project from this program, select it in the **Associated Projects** list and click the left arrow button.
- 9) Click **Save**.

Tip:

You can also edit the Program Basics page by selecting **Program # > Edit > Basic Details** from the Top Navigation bar.

Note: You must have the required permissions to associate a strategy to a program. You can associate a strategy to multiple programs.

Deleting a Program

To delete a program:

- 1) Click the **Programs** link in the Left Navigation bar, or select **Go To > Programs** from the Top Navigation bar.
- 2) From the Programs listing page, select the Program you want to delete.
- 3) From the Top Navigation bar, select **Program # > Delete**.

Working with Program Non WBS Activities

If your administrator has configured program non-WBS activities, they are displayed on the left navigation bar. These activities are associated with a specific program, and the ability to view, create or edit these activities are controlled by feature settings and permissions that are set by your Administrator.

The fields you see on these non-WBS activities page are set by you administrator. A notification email is sent to the user that the activity is assigned to You can link to other activities in the program, attach documents, and add notes to an activity, and view the History tab, if your administrator has enabled these options. The History tab allows you to view all changes that were made. You can also view, track, and monitor issues and their resolution by generating reports.

You can view issues from several areas within EnterpriseTrack:

- ▶ **My Work, Status:** shows issues that are assigned to you.
- ▶ **Program Module Menu (Program#):** lists all issues associated with the program . From the **Program(#)** Module Menu, select **Go to > <non_WBS activity>**.
- ▶ **Reports:** use the Program Non-WBS Activity report to generate a report based on your filter and output criteria. .

The following table shows the icons that are displayed on the Create page and the Edit page:

Icon/Field	Description
Display Complete Form	Select this check box to view the entire form. No fields are hidden.

<input type="button" value="Load My Settings"/>	Click to load your saved layout. You can also click the menu arrow to load the layout specific to a profile or global. This option is available only if your administrator enabled it.
<input type="button" value="Save My Settings"/>	Click to save your layout. You can also click the menu arrow to save the layout to other profiles or global. This option is available only if your administrator has enabled it.
<input type="button" value="Reset My Settings"/>	Reset fields.
<input type="button" value="Select Fields"/>	Click to view the fields that are available on this page.

In This Section

Adding a Program Non WBS Activity.....	149
Updating or Deleting Program Non WBS Activities.....	150

Adding a Program Non WBS Activity

To add a new non-WBS activity to a program:

- 1) Select Program Module Menu (**Program#**) > **Go To** > **<non-WBS activity>**, or click the **<non-WBS activity>** link on the Left Navigation bar within a particular program.
- 2) Click **Add**.
- 3) Enter a name.
- 4) Enter or select values for the other optional fields.
- 5) If Owner is configured as a required field, select an owner for this activity .
- 6) Click the **Save**.
- 7) To add documents:
 - a. Select the **Documents** tab.
 - b. Click **Add Doc**.
 - c. Enter a name.
 - d. Click **Browse** and select a file from your local/network drive, or enter the document URL.
 - e. Select if this document should be locked. Locked documents cannot be modified or deleted.
 - f. Select if you want to publish this document as a best practice document. If this box is checked, your document will be published to the KNowledge Base, under Best Practices.
 - g. Click **Add Document**.

- 8) To add notes:
 - a. Select the **Notes** tab.
 - b. Click **Add Note**.
 - c. Select the note type.
 - d. Enter the text.
 - e. Click **Create**.
- 9) To add linked activities:
 - a. Select the **Links** tab.
 - b. Click **Add New**.
 - c. From the **Link Type** pull-down field, select the link type. The options you see are set by your administrator.
 - d. From the **Available Activities** list, click the select to select the activities you want to link to.
 - e. Click **Add**.

Updating or Deleting Program Non WBS Activities

To update a program non-WBS activity:

- 1) Select Program Module Menu (**Program #**) > **Go To** > **<non_WBS activity>**, or click the **<non-WBS activity>** link on the Left Navigation bar within a particular program.
- 2) Select a non-WBS activity..
- 3) Click **Edit**.
- 4) Make the required changes.
- 5) Click **Save**.

To delete a program non-WBS activity:

- 1) Select Program Module Menu (**Program#**) > **Go To** > **<non_WBS activity>**, or click the **<non-WBS activity>** link on the Left Navigation bar within a particular program.
- 2) Select a non-WBS activity.
- 3) Click **Delete**.
- 4) Click **Yes** to confirm the deletion.

Working with Program Issues




Issues are unexpected problems or questions raised that require a plan of action and resolution. Use the Issues page to identify, prioritize, monitor, and manage program issues. The issues you add are associated with a specific program. The ability to view and create issues is controlled by feature settings and permissions that are set by your Administrator.

The fields you see on the Program Issues page are set by you administrator. When an issue is assigned to a user, a notification email is sent to that user. You can link to other activities in the program, attach documents, and add notes to issues, if your administrator has enabled these options. The History tab allows you to view all changes that were made. You can also view, track, and monitor issues and their resolution by generating reports.

You can view issues from several areas within EnterpriseTrack:

- ▶ **My Work, Status:** shows issues that are assigned to you.
- ▶ **Program Module Menu (Program#):** lists all issues associated with the program . From the **Program(#)** Module Menu, select **Go to > Issues**.
- ▶ **Reports:** use the Program Non-WBS Activity report to generate a report based on your filter and output criteria. .

The following table shows the icons that are displayed on the Issues Create page and the Issues Edit page:

Icon/Field	Description
Display Complete Form	Select this check box to view the entire form. No fields are hidden.
 Load My Settings	Click to load your saved layout. You can also click the menu arrow to load the layout specific to a profile or global. This option is available only if your administrator enabled it.
 Save My Settings	Click to save your layout. You can also click the menu arrow to save the layout to other profiles or global. This option is available only if your administrator has enabled it.
 Reset My Settings	Reset fields.
<input checked="" type="checkbox"/> Select Fields	Click to view the fields that are available on this page.

In This Section

Adding Program Issues	151
Updating or Deleting Program Issues	152

Adding Program Issues

To add a new issue to a program:

- 1) Select Program Module Menu (**Program#**) > **Go To** > **Issues**, or click the **Issues** link on the Left Navigation bar within a particular program.
- 2) Click **Add**.
- 3) Enter a name.
- 4) Enter or select values for the other optional fields.
- 5) If Owner is configured as a required field, select an owner for this issue.
- 6) Click the **Save**.
- 7) To add documents:
 - a. Select the **Documents** tab.
 - b. Click **Add Doc**.
 - c. Enter a name.
 - d. Click **Browse** and select a file from your local/network drive, or enter the document URL.
 - e. Select if this document should be locked. Locked documents cannot be modified or deleted.
 - f. Select if you want to publish this document as a best practice document. If this box is checked, your document will be published to the KNowledge Base, under Best Practices.
 - g. Click **Add Document**.
- 8) To add notes:
 - a. Select the **Notes** tab.
 - b. Click **Add Note**.
 - c. Select the note type.
 - d. Enter the text.
 - e. Click **Create**.
- 9) To add linked activities:
 - a. Select the **Links** tab.
 - b. Click **Add New**.
 - c. From the **Link Type** pull-down field, select the link type. The options you see are set by your administrator.
 - d. From the **Available Activities** list, click the select to select the activities you want to link to.
 - e. Click **Add**.

Updating or Deleting Program Issues

To update a program issue:

- 1) Select Program Module Menu (**Program #**) > **Go To** > **Issues**, or click the **Issues** link on the Left Navigation bar within a particular program.
- 2) Select an issue.
- 3) Click **Edit**.
- 4) Make the required changes.

5) Click **Save**.

To delete an issue:

- 1) Select Program Module Menu (**Program#**) > **Go To > Issues**, or click the **Issues** link on the Left Navigation bar within a particular program.
- 2) Select an issue.
- 3) Click **Delete**.
- 4) Click **Yes** to confirm the deletion.

Working with Program Risks



Project risks are any uncertain event or condition that can impact a program's objectives. Use the **Risks** page to identify, prioritize, monitor, and manage risks. The risks you add are associated with a specific program. The ability to create and view project risks is controlled by program level settings.

When you add a risk, you can specify the priority, severity, risk type, probability, impact, risk score, owner, date, resolution and recommended action. When a risk is assigned to a particular user, a notification email is sent to that user. You can link to other roadmap activities and non-WBS activities within the program, attach documents, and add notes to risks, if your administrator has enabled these options. The History tab allows you to view all changes that were made. You can also view, track, and monitor risks and their resolution by generating reports.

You can view risks from several areas within the application:

- ▶ **My Work:** shows risks that are assigned to you.
- ▶ **Program Module Menu (Program#):** lists all risks associated with the program. From the **Program (#) Module Menu**, select **Go to > Risks**.
- ▶ **Reports:** use the Non-WBS Activity Report to generate a report based on your filter and output criteria.

The following table shows the icons that are displayed on the Risks Create page, and Risks Edit page:

Icon/Field	Description
Display Complete Form	Select this check box to view the entire form. No fields are hidden.
 Load My Settings	Click to load your saved layout. You can also click the menu arrow to load the layout specific to a profile or global. This option is available only if your administrator enabled it.
 Save My Settings	Click to save your layout. You can also click the menu arrow to save the layout to other profiles or global. This option is available only if your administrator has enabled it.

<input type="checkbox"/> Reset My Settings	Reset fields.
<input checked="" type="checkbox"/> Select Fields	Click to view the fields that are available on this page.

In This Section

Adding Program Risks.....	154
Updating or Deleting Program Risks.....	155

Adding Program Risks

To add a new risk to a program,

- 1) Select Program Module Menu (**Program#**) > **Go To** > **Risks**, or click the **Risks** link on the Left Navigation bar within a particular program.
- 2) Click **Add**.
- 3) Enter a name.
- 4) Enter or select values for the other optional fields.
- 5) If Owner is configured as a required field, select an owner for this issue.
- 6) Click the **Save**.
- 7) To add documents:
 - a. Select the **Documents** tab.
 - b. Click **Add Doc**.
 - c. Enter a name.
 - d. Click **Browse** and select a file from your local/network drive, or enter the document URL.
 - e. Select if this document should be locked. Locked documents cannot be modified or deleted.
 - f. Select if you want to publish this document as a best practice document. If this box is checked, your document will be published to the KNowledge Base, under Best Practices.
 - g. Click **Add Document**.
- 8) To add notes:
 - a. Select the **Notes** tab.
 - b. Click **Add Note**.
 - c. Select the note type.
 - d. Enter the text.
 - e. Click **Create**.
- 9) To add linked activities:
 - a. Select the **Links** tab.

- b. Click **Add New**.
- c. From the **Link Type** pull-down field, select the link type. The options you see are set by your administrator.
- d. From the **Available Activities** list, click the select to select the activities you want to link to.
- e. Click **Add**.

Updating or Deleting Program Risks

To update a program risk:

- 1) Select Program Module Menu (**Program #**) > **Go To > Risks**, or click the **Risks** link on the Left Navigation bar within a particular program.
- 2) Select a risk.
- 3) Click **Edit**.
- 4) Make the required changes.
- 5) Click **Save**.

To delete a risk:

- 1) Select Program Module Menu (**Project #**) > **Go To > Risks**, or click the Risks link on the Left Navigation bar within a particular program.
- 2) Select a risk.
- 3) Click **Delete**.
- 4) Click **Yes** to confirm the deletion.

Working with Program Documents

In This Section

Adding a New Program Document	155
Update Program Documents	156

Adding a New Program Document

Program specific documents can be uploaded to the documents section located within a particular program. This is in addition to documents that were attached to a specific issue, risk, or non-WBS activity.

To add a new program specific document:


- 1) Navigate to the **Documents** page by clicking the **Documents** link on the Left Navigation Bar within a particular program, or from the Top Navigation Bar select **(Program #) Go To > Documents**.
- 2) Click the **Create** button.
- 3) Enter a name for the document.
- 4) Enter a description of the document.
- 5) Select the type of document you are creating. The document types are set by your administrator.
- 6) Enter the complete path to the document location, or use the **Browse** button to locate it on your machine or the network. You can also enter a fully qualified URL if the document is hosted external to the system.
- 7) If you do not want users to modify the document, and if you have the appropriate permissions, you can choose to lock the document.
- 8) To make this document a Best Practice document and add it to the Global Knowledge Base, select the **Should this be published as a best practice?** option. You will need the appropriate permissions to add documents to the Knowledge Base.
- 9) Click **Add Document** to upload your document.

The document are displayed on the **Documents page**. Click the **File Name / URL** link to download or view the document.

Update Program Documents

To update a program specific document:

- 1) Navigate to the Documents page by clicking the **Documents** link on the Left Navigation Bar within a particular program, or from the Top Navigation Bar select **(Program#) Go To > Documents**.
- 2) Select the document you want to edit.
- 3) Make the required changes.
- 4) To view a history of the revisions made to the document click the **View Revision History** link. From this page, you can download prior versions of the document by clicking on the link under **File Name/URL**.
- 5) You can also choose to make a document have read-only properties from the **Update or Delete Document** page. Once a document is marked read-only, only the administrator can update and delete this document.
- 6) Click the **Update Document** button to save your changes.

Note: If a document is locked, you may not be able to update it. The lock icon  is displayed next to all the locked documents on the Program Documents page. If you have the required permissions, you can unlock it from the **Update or Delete Document** page.

Deleting Documents

- 1) Select the document you want to delete
- 2) Click the **Delete Document** button.
- 3) Click **OK** to confirm your deletion.

Note: Once a document is deleted, its revision history is also deleted.

Strategies

Working with Strategies

Companies need to set corporate performance goals and track how well the enterprise performed against these goals. EnterpriseTrack makes it easy for users to create a hierarchical map of strategies and link them to projects. The data at lower levels can be rolled up the hierarchy using user specified formula.

Within EnterpriseTrack, different Strategies are grouped under Categories. When the system is deployed, two default categories, Corporate and Organization are created. New categories can be created just as new Strategy nodes can be created within each category.


All categories, except the Organization category are identical in their behavior. Your company's organizational hierarchy is displayed within the Organization category.

Multiple alignment trees can be created within EnterpriseTrack. The names of each tree (E.g. Process, Strategy, Balance Scorecard etc.) are displayed in the left navigation bar. The navigation and functionality within each tree are identical. The configuration of the fields, the independent permission structure, and the data contained within each tree provides independent meaning to each tree.

Navigating the Strategy Module


The Strategy module is made up of three panes: Tree pane on the top left, List pane on the top right and Details pane at the bottom.


 Use this icon to maximize the size of each pane.

 Use this icon to restore the pane to its original size.


Tree Pane


The Tree pane displays the strategy tree. You can create new nodes in the tree, cut, copy and paste elements of the tree and delete nodes from the tree using the icons displayed on this pane.


 Use this icon to add a node.




 Use this icon to cut a node. Top level nodes cannot be cut.

 Use this icon to copy a node. Top level nodes cannot be copied.

 Use this icon to paste the node that you cut or copied.

 Use this icon to delete a node. Only user-created nodes can be deleted. When a node is deleted, all its children (nodes) are also deleted.

 Use this icon to expand the complete strategy tree.


Status and Trend indicators for the primary measure of the node are displayed within the tree pane for each node. A risk indicator (High , Medium , Low ) for the node is also displayed here. Risk indicators are set manually. Refer to the Working with Strategy Nodes section for more details on status trend indicators for measures.


List Pane


The List displays the child nodes of the currently selected node in the Tree pane. Click an item in the list to view its properties in the Details pane. Status, Trend, and Risk indicators are displayed in each of the first three columns of the List pane.

Details Pane

The Details pane displays the properties of the selected node.

 Click this icon to edit the properties.

 Click this icon to save the changes made to the properties.

 Click this icon to leave the properties unchanged.

Note: If you have selected a node from the Tree pane, you will see its children in the List pane and its properties in the Properties pane. To view the properties of the child, you can click on its name in the list pane, or expand the node in the tree pane and then select the name of the child node.

Adding a Node

You can add a new Strategy node to an existing Strategy node in the Tree pane of the Strategies page.

To add a node:

- 1) Click on the parent node to select it.
- 2) To add a new subcategory or sub node, click the root **Strategy** folder.

- 3) Click the **Add** icon. A new node is added.
- 4) Enter/Select the properties for the new node in the Details pane.
 - ▶ Name
 - ▶ Type
 - ▶ Status – Active/Inactive
 - ▶ Owner
 - ▶ Tracking Frequency
 - ▶ Priority
 - ▶ Risk Indicator
 - ▶ Score
 - ▶ Business Drivers
 - ▶ Description
 - ▶ Mission
 - ▶ Vision
 - ▶ Comments
- 5) If you are adding a node to the Organization node, you will have to select the specific organizational unit within which the node should be situated. This unit becomes a node and within it, the new strategy is created.
- 6) Click **Save** to save the details of the newly created strategy node.

Working with the Organization Nodes

When you add a node to the Organization node, you also select the specific organizational unit within which the node should be situated. This unit becomes a node and within it, the new strategy node is created.

Organization node properties

Organization node information is displayed in the following tabs on the Details pane.

- ▶ **General** tab
- ▶ **Measure** tab
- ▶ **Projects** tab
- ▶ **Links** tab
- ▶ **Data** tab
- ▶ **Charts** tab
- ▶ **Report** tab
- ▶ **Documents** tab

Viewing the Charts for an Organization node

To view charts for an organization node:

- 1) Click the **Charts** tab on the properties pane of an organization node.
- 2) You can use the filters to modify the display criteria.

Working with Strategy Nodes

General

This displays information such as the name, type, and status of the strategy node. If a node is made Inactive, then it and all its child nodes are not included in the roll-up logic. You also define the tracking frequency - i.e., how often you want the data to be tracked for this particular strategy. If the tracking frequency is set to be non-recurring, it can only have one value. If it is recurring, the data could be tracked on a monthly or yearly basis.

Measure

On this tab you can specify measures for strategy nodes or metrics being tracked by this strategy node.

Project

On this tab you can define the projects that are associated with this strategy.

Program

On this tab you can view and define programs to associate with this strategy. You can also view details of the associated program.

Links

This tab displays separate tables for links to Ideas and Proposals. You can edit the ideas and proposals to which this node is linked.

Data

You can validate and recompute the data from this tab.

Chart

You can view/edit the financial chart display by editing the tracking dates and selecting cumulative or non-cumulative data from this tab.

Report

You can run a strategy roll-up report or a strategy detail report from this tab.

Documents

You can add (upload) a document from a local or network drive from this tab. You can also provide a link to an externally hosted document. A name, description, and document type (Finance, Policies, and Procedures, Other) of the added document are indicated for the added document.

Working with the Strategy Nodes

Strategy nodes can be created, edited and deleted by users with appropriate permissions. The Tree pane displays the complete strategy tree. The List pane displays the child nodes of the node selected in the Tree pane. The Details pane displays the properties of the selected node.

The Details pane is broken out into various tabs. The tabs display the following information:

Specifying Measures for Strategy Nodes

Each strategy node tracks specific Measures or metrics. Each node can have multiple measures.

On the **Measures** tab, you can add new measures, edit and delete existing measures, and enter data for each measure. You can also view the charts for each measure from this page.

There must be one primary measure. Each measure can have a time series, (depending on the tracking frequency that was chosen), with two data streams, one for Plan data and one for Actual data. This time series can then be used for plotting charts of Plan vs. Actual data.

You can define separately how the Plan and Actual data for each node should be calculated. For example – Plan data may be entered manually, while the Actual data might be derived from a formula or through organization roll up. Depending on your choice, you will have to define additional parameters for the choice of data, for example, if you set the actual data to be **Project Finances**, you will have to further define whether the Finance Category should be Expenses or Savings and whether the operation performed should be to calculate an average or a sum.

Computed measures can only use measures come before it in the sort order. E.g. M3 can use M1 and M2 in its computation, but not M4. You can also use measure of child nodes. Allowed operators for calculations are +, -, /, *, ^, .

Modifying the Order of Measures

Since computed measures can only use measures that come before it in the measure sort order, you may need to modify the sort order of the measure.

To modify the order of measure:

- 1) From the **Strategies** page, navigate to the appropriate node and click on it.
- 2) On the **Details** pane for the node, click the **Edit** button.
- 3) Click the **Measures** tab.
- 4) Use the up and down arrows to move measures up and down.
- 5) Click the **Save** button.

Setting Status Indicators for Measures

To set the status indicators for a measure:

- 1) Click the **Measures** tab within the **Details** pane of the appropriate node.
- 2) Click the **Edit** link next to the measure for which you want to set the status indicator.
- 3) Click the **Status Indicators** tab.
- 4) From the **Status Indicator** pull-down menu, select a status indicator.
- 5) Select the status type is **Manual** or **Computed**. If computed, specify the status period and how you want to compute the status.
 - a. Specify the status period you want to use. If you select **Last**, the status is computed based on the last available data, including future dates. If you select **Current**, the status is calculated based on the current period data. If no current data is available, the last available data is used.
 - b. Select whether you want to compute the status based on **Plan, Actual, Variance, or % of variance**.
 - c. Define the lower and upper level values for each level within the indicator.
- 6) Click **Save**.

Editing Data for Measures

You can edit the data for each measure from the **Measures** tab within the Details pane of the appropriate node. Click the **Data** link in the Action column of each measure to view and edit the data for each measure at a time.

You can also select the **Data** tab within the Details pane of the appropriate node to view and edit the data for all the measures from one location.

Viewing the Strategy Reports

For any selected Strategy node, you can view the Strategy Detail or Strategy Roll up report based on the filter criteria.

To run a report:

- 1) Click the **Report** tab within the **Details** pane of the appropriate node.
- 2) From the **Select Report** drop-down list, select the type of report you want to run.
- 3) For the the Strategy Rollup Report, select if you want to display the data in a table or chart.
- 4) Select the filter criteria.
- 5) Click **Run Report**.

Strategy Detail Report


You can filter the report to display based on the following criteria: active and inactive status, all levels under current node, path information associated proposals, projects, and programs.

Strategy Rollout Report

You can filter the report to display based on the following filter criteria: active and inactive status, all levels under current node, path information, project related fields, global resource field, and organization related fields.

Associating Programs to a Strategy Node

To associate a program to a Strategy node:

- 1) Click the **Program** tab within the **Details** pane of the appropriate strategy node.
- 2) From the **Details** pane, click the **Edit**  button.
- 3) Select a program you want to associate with this strategy.
- 4) Select the % contribution for the program.
- 5) Select **Save**.

Tips:

- ▶ To delete the association of a program, select the **Delete** checkbox next to a program.
- ▶ You can also change the order of the programs by selecting the up and down arrows.

Note: You must have the required permissions to associate a strategy to a program. You can associate a strategy to multiple programs.

Viewing Program Details

To view the program details in a list or chart:

- 1) Click the **Program** tab within the **Details** pane of the appropriate strategy node.
- 2) Select the **View Details** link.
- 3) Select the **List** or **Chart** tab.
- 4) Click **Close**.

Working with Strategic Alignment

EnterpriseTrack allows you to specify strategic alignment for the project when new proposals and projects are created.

You can specify the strategy with which a project is aligned at the proposal stage. A project may contribute to one or more strategies. User can specify the percentage contribution towards each strategy.

- 1) To view the current strategic alignments of a project or proposal, click the **Strategic alignment** tab in the **Edit Proposal** or **Edit Project** pages.
- 2) You can edit the percent contribution of each strategy (for a particular project) by clicking the **Edit Contributions** button.

- 3) To view the details of each strategy, click the **[View]** link in the action column. You can view the details of the strategy including a list of all projects associated with it, links to associated ideas and proposals and a report about the strategy.

Adding a strategic alignment to a project

- 1) To add a strategy to a project, click the **Add Strategy** link on the **Strategic alignment** page.
- 2) The strategy tree can be expanded by clicking the **[+]** next to the strategy categories.
- 3) Select the strategy you wish to associate with the project and click the **Add** button. The strategy is added to the list on the Strategic alignment page.

Note: Strategic alignment cannot be specified while a Quick Project is created. You can go back and edit it to specify the strategies.

Knowledge Base

In This Section

Working with Global Documents.....	164
Navigating the Knowledge Base.....	164
Creating a New Global Document	165
Updating and Deleting Global Documents.....	166
Deleting documents.....	166
Working with Tool Templates	167
Creating a New Tool Template	167
Updating Tool Templates	167
Working with Best Practices Documents	168

Working with Global Documents

EnterpriseTrack allows you to maintain a global knowledge base of documents to aid in project execution. Global documents can also be used to capture learning and share knowledge across projects. A large number of document types are supported including MS Word, MS Excel, PDF, and MS PowerPoint etc.


Users can download any document by clicking on its file name. Authorized users can update a document by clicking on its description.

You can quickly locate documents or templates by using filters.

Navigating the Knowledge Base


The Knowledge base module is made up of three panes: Tree pane on the top left, List pane on the top right and a Properties pane at the bottom.


 Use this icon to maximize the size of each pane.

 Use this icon to restore the pane to its original size.


Tree Pane


The tree pane displays the knowledge base tree. You can create new folders (or nodes) in the tree, cut, copy and paste elements of the tree and delete folders from the tree using the icons displayed on this pane. Folders can contain documents or templates.


 Use this icon to create a new folder.

 Use this icon to copy a folder.

 Use this icon to cut a folder.


 Use this icon to paste the folder that you cut or copied.


 Use this icon to delete a folder. When a folder is deleted, all its children (nodes - i.e. any folders, documents and templates within it) are also deleted.

 Use this icon to expand the complete knowledge base tree.

List Pane


The list displays the child nodes, i.e. (the documents and templates) of the currently selected folder in the tree pane. Click on an item in the list to view its properties in the properties pane.

 Use this icon to add a new document.


 Use this icon to add a new template.

Properties Pane

The properties pane displays the properties of the selected document or template.

 Click this icon to edit the properties.

 Click this icon to save the changes made to the properties.

 Click this icon to leave the properties unchanged.

Note: If you have selected a node (i.e. folder) from the Tree pane, you will see its children in the List pane and its properties in the Properties pane. To view the properties of the child (i.e. the document or template), you must click on its name in the list pane.

Creating a New Global Document

- 1) To create a new global document, click the **Knowledge Base** link in the Left Navigation bar or select **Go To > Knowledge Base** from the Top Navigation bar.
- 2) Navigate to the appropriate folder in the tree pane, or create a new folder by clicking the **New Folder** icon.
- 3) Click the **Add** button.
- 4) Enter a description of the document.

- 5) Select the type of document you are creating. The categories of documents are created during system configuration and depend on the selected initiative. If no initiative is selected, only global document types are shown.


Note: Documents set as type Policies and Procedures are displayed in the Idea Portal, under Policies and Procedures.

- 6) Enter the complete path to the document location, or use the **Browse** button to locate it on your machine or the network. You can also enter a fully qualified URL if the document is hosted external to the system.
- 7) To prevent other users from modifying the document you can select the **Lock Document** check box. You can also enter a lock description.
- 8) To make this document a Best Practice document select the **Should this be published as a best practice?** option.
- 9) Click **Save** to upload your document.

Updating and Deleting Global Documents

To update or delete a global document:

- 1) Navigate to the appropriate folder in the tree pane, and click on the name of the document in the list pane.
- 2) In the properties pane, click the **Edit** button.
- 3) Make the required changes. To view a history of the revisions made to the document click the **Archive** tab. From here you may download prior versions of the document by clicking on the link under **File Name/URL**.
- 4) Click the **Save** button to save your changes.

Note: If a document is locked, you may not be able to update it. The lock icon  is displayed next to all the locked documents on the Project Documents page. If you have the required permissions, you can unlock it from the properties pane.

Deleting documents

To delete a document:

- 1) Click on the name of the document in the list pane.
- 2) Click the **Delete** button to delete document. You may be required to confirm the deletion. A deleted document will not be visible in the list of global documents.

Note: Once a document is deleted, its revision history is also deleted.


Working with Tool Templates

The Tool Templates page displays the list of tool templates that have been created in the system. Tool Templates are used in project roadmaps and in an individual project's task and deliverables.

In installations with multiple initiatives on the same system, tool templates can be specific to a given initiative or can be used across initiatives. You can quickly locate documents or templates by using filters.

Creating a New Tool Template

To create a new tool template:

- 1) Click the **Knowledge Base** link in the Left Navigation bar, or select **Go To > Knowledge Base** from the Top Navigation bar.
- 2) Navigate to the appropriate folder in the tree pane, or create a new folder.
- 3) Click the  button.
- 4) In the properties pane, enter a name for the tool template or select one from the **Suggested Template Names** pull-down menu.
- 5) If needed, enter the initiative for which this global document is being created. By default, this is set to be **None**.
- 6) Enter a description of the tool template.
- 7) Select the type of tool template you are creating. The categories of templates are created during system configuration, and depend on the selected initiative. If no initiative is selected, only global tool types are shown.
- 8) Enter the complete path to the template location, or use the **Browse** button to locate it on your machine or the network. You can also enter a fully qualified URL if the template is hosted external to the system.
- 9) In the Tool Help section, you can enter a tool tip and additional help text that will be displayed when the tool is accessed. You can also attach an external document or specify a URL for additional help with the tool.
- 10) To prevent other users from modifying the document you can select the **Lock Document** check box. You can also enter a lock description.
- 11) Click **Save** to upload your template.

Note: When a project roadmap is created, the administrator may refer to a tool template that has not yet been uploaded. A list of such referenced but not uploaded tool templates is displayed in the **Suggested Template Name** field. When all templates referenced in project roadmaps have been uploaded this field will not be displayed.

Updating Tool Templates

To update a tool template:

- 1) Click on the name of the tool template in the list pane.

- 2) In the properties pane click the **Edit** button.
- 3) Make the required changes. To view a history of the revisions made to the template click the **Archive** tab. From here you may download prior versions of the document by clicking on the link under **File Name/URL**.
- 4) Click the **Save** button to save your changes.

Working with Best Practices Documents

EnterpriseTrack allows you to maintain a global knowledge base of Best Practices documents. Any document that is added to an Idea, Proposal or Project can be published as a Best Practice. Global documents can also be published as Best Practice documents.

The Best Practices section within the Knowledge Base displays all the documents in the system that are Best Practices. The list is organized by the objects (such as Ideas, Projects etc.) with which the documents are associated.

Viewing Best Practices Documents

- 1) Click the **Best Practices** link in the Knowledge Base section of the Left Navigation menu.
- 2) Click the file name of the document to view the document.
- 3) Click the name of the idea, proposal or project name to drill down to the details of that object.

Resources

In This Section

Working with Resources.....	168
Working with Resource Calendars	169
Viewing Resource Listing Details	171
Resource Planning	171
Approving Resources and Requests	173

Working with Resources

Click the **Resources** link in the Left Navigation bar, or select **Go To > Resources** from the Top Navigation bar to begin working with resources. You can view, request and approve resources and configure to view your resource plan, or your team's resource plan. You can also view and analyze how each user's time is being utilized. Click on any name to view detailed information about the resource.

You can view the assignments of each user, including a listing of the specific projects they are involved in. You can view Gantt charts and utilization charts from this section as well.

For more information on searching for resources, see topics **Advanced Search and Saved Searches** (on page 20) and **Working with Global Search** (on page 17).

Working with Resource Calendars

You can edit a resource calendar by changing the reference calendar, work hours, work days or by adding, modifying or deleting calendar exceptions.


Note: You must have the **Edit All Resource Calendar** and **Create/Modify Resource** permissions to edit a team member's calendar.

In This Section

Modifying Work Hours or Work Days	169
Adding Exceptions	169
Delete Calendar Exceptions	169


Modifying Work Hours or Work Days

To modify work hours or work days:

- 1) Navigate to the *Resource Listing* page (**Go To > Resource > Listing**).
- 2) Select a resource and select  > **Edit > Calendar**.
- 3) Click the **Edit** button.
- 4) Enter the number of work hours.
- 5) Click to select the work days.
- 6) Click **Save**.

Adding Exceptions

To add a calendar exception:

- 1) Navigate to the *Resource Listing* page (**Go To > Resource > Listing**).
- 2) Select a resource and select  > **Edit > Calendar**.
- 3) Click the **Edit** button.
- 4) Select a date by clicking on it. You can use the tabs to navigate to a different month or year. The Manage Exceptions pop-up window displays.
- 5) Enter a name for this exception.
- 6) Select if you want to set it as a working day or a non-working day.
- 7) Click **Save**.

Delete Calendar Exceptions

To delete a calendar exception:

- 1) Navigate to the *Resource Planning* page (**Go To > Resource > Listing**).
- 2) Select a resource and from select  > **Edit > Calendar**.

- 3) Click on the exception to select it. The Manage Exception pop-up window is displayed.
- 4) Click **Delete**.




Viewing Resource Listing Details

Navigate to the *Resource Listing* page by clicking **Go To > Resources > Listing** from the Top Navigation bar, or select **Resources** from the Left Navigation bar. From the **Saved Search: View** drop-down menu, you can select to view all resources or a just the resources you manage.

The Resource listing page displays the following information:

- ▶ **Resources Tab:** Displays a list of resources based on your search criteria.
- ▶ **General Tab:** Displays the Resource Distribution by Allowed Roles chart, the Resource Distribution by Access Profile chart, and the resource by status count.
- ▶ **Utilization Tab:** Displays the following resource utilization charts: the planned versus actual utilization (%) and the resource utilization chart.
- ▶ **Gantt Tab:** Displays the Gantt chart for all activities or tasks associated with a resource. You can view the plan versus actual dates and the percentage complete for each activity.
- ▶ **Heatmap Tab:** Displays the pending requested effort (RQ), committed effort (CM), actual utilization (AQ) and committed effort as a percentage of capacity (CM/CP %) for each resource. You can filter on Project Status to filter out projects that are closed..
- ▶ **Assignments Tab:** Displays assignments associated with a resource.
- ▶ **Rate Tab:** Displays the setup rate, overtime rate and standard rate for the selected resource.
- ▶ **Expertise Tab:** Displays areas of expertise for the selected resource.
- ▶ **Certification Tab:** Displays certificates acquired by a resource.
- ▶ **Allocation Tab:** Displays a list of allocations that are waiting for approval.
- ▶ **Timesheets Tab:** Displays a list of timesheets that are waiting approval.

From the Resource Listing page you can also add, edit, delete and copy resources.

To edit a resource, select a resource from the **Resource Listing** page and select  > **Edit**. You can make changes to the resource details, area of expertise, Certifications, and Assets. You can delete a resource by selecting  > **Delete**. To copy a resource, select  > **Copy**.

Resource Planning

The Resource Planning List page allows you to plan and manage your resources. It provides a snapshot of all your team members and the projects they are working on. The cost, required effort, committed effort and the duration of the projects are also displayed. You can use this to view resources that are over-committed or underutilized. Your resource plan, the resource plan for all resources, and the approvals that are pending your approval can be accessed through the Resource Planning page.

To access the Resource Planning page, from the Top Navigation bar select **Go To > Resources > Planning**. You can edit the team member information, view and edit the finances associated with the resource, and reassign activities from the **Actions** menu.

Use the **Quick Access Display** icon to change the resource plan broken down into months or weeks, and to select the frequency plan columns (Capacity, Requested, Committed, Total Demand, and Percent Allocations/Approvals) to display.

The following fields are displayed on the Resource Planning page:

▶ **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.

▶ **AC/CP(Percent)**

Actual Utilization.



Reassigning Activities

To reassign an activity to another team member do the following:

- 1) Select  > **Reassign**. The Reassign Activities/Issues screen is displayed.
- 2) Select a resource and click the **Reassign**.

Approving Resources and Requests

To approve resources:

- 1) Navigate to the Resources page by selecting **Go To > Resources > Listing** or by clicking the **Resources** link on the Left Navigation Bar.
- 2) Click the **Allocations** tab. The allocation requests that require your approval are displayed.
- 3) Select an approval and select  > **Edit Request** to display the Edit Resource Request page.
- 4) If the requester is flexible on preferred users, you can assign a resource. You can select the filter  button to find the appropriate resource.
- 5) Select the commitment type (Hard or Soft).
- 6) If the requester is flexible on dates, you can modify the start and end date for this resource.
- 7) Enter additional comments about this request in the Comments box.
- 8) If required, you can select a new approver from the drop-down list.
- 9) Click the **Save** button if you are still working on the request and want to save your changes. Click the **Approve** button to approve this resource. Click the **Reject** button to reject the resource.

Social Stream



In This Section

Subscribing and Unsubscribing	173
Viewing the Social Stream Page	174
Displaying the Social Stream Ticker	175
Using the Social Stream	175
Project Stream Settings.....	175



Subscribing and Unsubscribing

The Social Stream module allows seamless communication, collaboration, and social networking among project team members. Team members can now easily share ideas, opinions, comments or messages by subscribing to social streams. You can also view timely user and system generated news, alerts, notifications, and comments associated with your projects.

To subscribe to a Social Stream:

From the listing pages (Project Listing Page, Proposal Listing Page, and Ideas Listing Page), the *Social Stream* page, or from the *Project Basics* page, click the  icon next to a project, proposal or idea. The star turns yellow  indicating that you have successfully subscribed into its social stream.

To un-subscribe from a Social Stream:

From the listing pages (Project Listing Page, Proposal Listing Page, and Ideas Listing Page), the *Social Stream* page, or from the *Project Basics* page, click the  icon next to a project, proposal, or idea. The star turns gray  to show that you have un-subscribed from that social stream.

Viewing the Social Stream Page

The *Social Stream* page displays messages and comments associated with all social streams. To view the *Social Stream* page, from the Top Navigation Bar select **Go To > Social Stream**.

Filtering Messages

You can filter the messages by clicking the **Filter** button.

Filter	Description
My Messages	Shows the main messages posted by you. It includes comments associated with those messages.
My Subscriptions	Shows all messages and system event updates on the social streams you have subscribed to.
Specific Project	Shows messages and system event updates related to a specific project
Specific Proposal	Shows messages and system event updates related to a specific proposal.
Include New Ideas	Click the box to include system event updates on new ideas creation.
All Messages	Clears all filters and shows all messages including non-subscriptions.

Refreshing Messages

Click the **Refresh** button to update the *Social Stream* page with the latest events or messages.

Displaying the Social Stream Ticker

The social stream ticker is displayed just under the top banner. Depending on the filters used, it displays the latest messages from all social streams. It is usually refreshed every minute and only the most current message is displayed. From the ticker you can filter messages, create a new message, or comment on a message

To display the social stream ticker:

- ▶ From the Top Navigation Bar select **View > Display Steam Ticker**.

To expand the ticker:

- ▶ Click the **Toggle** icon.

Using the Social Stream

Posting a New Message

To post a new message:

- 1) Click the **New Message** button.
- 2) Type your message. To post a public message, type in the **Create a new Public Message** box.
- 3) Click the **Send** button. If you are within a Project, Proposal, or Idea then the message is automatically associated with it.

Commenting on a Message

To comment on a message:

- 1) Start typing in the **Write a Comment** box. Press the **Enter** key to add a new line.
- 2) Click the **Send** button.

Viewing a Message

To view the comments associated with a message, click the **View All Comments** link.

Project Stream Settings

As a Project Manager you can enable some or all project level event notification to be streamed or emailed.

To set project notifications to be streamed, do the following:

- 1) From the Project Module Menu select **(Project #) Go To > Settings**.
- 2) From the *Project Settings* screen, click the **[Edit]** link under the *Action* column next to each notification.

- 3) From the *Edit Notification* screen, select **Enable Social Stream**.
- 4) Click the **Update** button.

Timesheets

The Timesheets module is an optional module in EnterpriseTrack. Team members can complete weekly timesheets for each project that they are assigned to and their project managers approve this time spent.

In This Section

Working with Timesheets	176
Using Keyboard Shortcuts: Timesheet Module	176
Viewing Timesheets	179
Creating Timesheets	179
Deleting Timesheets.....	180
Editing Timesheets.....	181
Approving Timesheets.....	181
Approving/Rejecting Multiple Timesheets.....	182
Managing Timesheets	183

Working with Timesheets

EnterpriseTrack has created the Timesheets module to help users keep track of the number of hours spent on each project. You may also be able to keep track of meeting hours and vacation time here based on the configuration of your system. To begin working with timesheets, click the **Timesheets** link in the Left Navigation bar, or select **Go To > Resources > Timesheets** from the Top Navigation bar.

Using Keyboard Shortcuts: Timesheet Module

The tables below list some of the keyboard shortcuts you can use in the Timesheet module:

Main Timesheet Page

Action	Keyboard Shortcut
Open Help menu	Ctrl+Alt+H
Open Advanced Search page	Ctrl+Alt+F
Access Go To menu	Ctrl+Alt+G
Open Create Menu	Ctrl+Alt+C

Open My EnterpriseTrack menu	Ctrl+Alt+M
Open View menu	Ctrl+Alt+V
Logout of the application	Ctrl+Alt+L
Focus on the next element	Tab
Move up and down rows or a list	Up and Down arrows
Confirm a selection	Enter
Toggle an option On or Off	Enter

Timesheet Listing Page

Action	Shortcut
Create timesheet	Ctrl+Alt+N
Approve timesheet	Ctrl+Alt+a
Reject timesheet	Ctrl+Alt+r
Manage timesheet	Ctrl+Alt+m
Access more filters	Ctrl+Alt+Y
Go	Ctrl+Alt+W
Print grid	Ctrl+Alt+7
Export grid	Ctrl+Alt+8
Select grid columns	Ctrl+Alt+9
Toggle Grid Filters	Ctrl+Alt+0

Timesheet Create Page

Action	Shortcut
Save timesheet	Ctrl+Alt+S
Save and close timesheet	Ctrl+Alt+o
Submit timesheet for approval	Ctrl+Alt+A
Cancel	Ctrl+Alt+X
Move to previous week	Ctrl+Alt+1
Move to next week	Ctrl+Alt+2
Expand/collapse all	Ctrl+Alt+3
Select column	Ctrl+Alt+9
Skip to Note section	Ctrl+Alt+5

Timesheet Edit Page

Action	Shortcut
Save timesheet	Ctrl+Alt+S
Save and close timesheet	Ctrl+Alt+o
Submit timesheet for approval	Ctrl+Alt+A
Cancel	Ctrl+Alt+X
Expand/Collapse all	Ctrl+Alt+3
Select column	Ctrl+Alt+9
Skip to Note section	Ctrl+Alt+5

Timesheet View Page

Action	Shortcut
Delete timesheet	Ctrl+Alt+D
Submit timesheet for approval	Ctrl+Alt+A
Reopen timesheet	Ctrl+Alt+r
Cancel	Ctrl+Alt+X
Done	Ctrl+Alt+X
Edit timesheet	Ctrl+Alt+E
Expand/Collapse all	Ctrl+Alt+3
Select column	Ctrl+Alt+9
Skip to Note section	Ctrl+Alt+5

Timesheet Filter Page

Action	Shortcut
Saved search	Ctrl+Alt+7
Cancel	Ctrl+Alt+X
Apply filters	Ctrl+Alt+A
Reset filters	Ctrl+Alt+R
Current filters	Ctrl+Alt+6

Timesheet Admin Page

Action	Shortcut
Close timesheet period	Ctrl+Alt+T
Run	Ctrl+Alt+R
Missing Timesheet Report	Ctrl+Alt+i
Reopen close period	Ctrl+Alt+o

Timesheet Notes Page

Action	Shortcut
Cancel	Ctrl+Alt+X
Save	Ctrl+Alt+S

Viewing Timesheets

To view timesheets:

- 1) Click the **Timesheets** link in the Left Navigation bar, or select **Go To > Timesheets** from the Top Navigation bar.
- 2) From the **Quick Filters** pull-down menu, select **My Timesheets**, **All**, or **Pending my Approval** and click **Go**. A list timesheets that meet your filter criteria is displayed.
- 3) Click **View**.

For more information on sorting and filtering timesheets, see topics *Sorting Data* and *Using Filters*. For more information on creating, saving, and managing your filter criteria, see topic *Advanced Search and Saved Searches*.

Creating Timesheets

To create a new timesheet:

- 1) Click the **Timesheets** link in the Left Navigation bar, or select **Go To > Timesheets** from the top navigation bar.
- 2) Click **Create New Timesheet**. The *Create Timesheet* page is displayed.
- 3) Type in the dates or use the calendar to select the starting week and click **Go**. The current week is pre-selected.
- 4) Click **Select Categories** to narrow or expand the reporting categories displayed on this page.

- a. Click the **Project Time Reporting** check box to view all projects that you can enter time against. From the list of available projects, select the projects you want to add by clicking the **>** button. You can also select **Add Projects from Previous Period** to add the projects that were added to the Selected Projects list in the previous timesheet period.
 - b. Click the check box to display **Non-Project Time Reporting Categories** and **Non-Working Time Reporting categories**.
 - c. Click **OK**.
- 5) Enter project related time, non-project related time (Administration, Training, Recruitment), or non-working time (holiday, paid time off, unpaid time off).
 - 6) Enter overtime effort for each activity, if applicable.
 - 7) Enter the Estimated Time to Complete (ETC) for each activity, if enabled by your Project Manager. If you are working with multiple team members on this activity, you should enter the ETC for your portion of the activity and not for the entire activity.
 - 8) Add a note by entering it in the box provided.
 - 9) Click **Save** to save your changes, or click **Submit for Approval** to send it to your manager or supervisor for approval, or click **Cancel** to leave the timesheet unchanged.

Notes:

- If no project time is listed on your timesheet, then the timesheet is sent to the Resource Manager for approval.
 - You will receive an email notification when your timesheet is approved, rejected, or re-opened only if your administrator has configured it. Contact your administrator, if you would like to receive notifications.
-

Deleting Timesheets

You can delete timesheets that have the status Open, Submitted, or Rejected only if you have permissions to delete timesheets. To delete timesheets that have been approved, you must first re-open the timesheet.

To delete a timesheet:

- 1) Click the **Timesheets > Listing** link in the Left Navigation bar, or select **Go To > Timesheets > Listing** from the Top Navigation bar.
- 2) Click **View** next to the timesheet you want to delete. The selected timesheet is displayed.
- 3) Click **Delete**.

Tips:

Use the **Quick Filters** box to find the timesheet you want to delete. You can also select **More Filters** to refine your search parameters.

Note: You cannot delete timesheets if they were submitted on or before the Timesheet Close Period. These include timesheets that are approved, open for corrections, submitted with corrections, rejected with corrections, and canceled.

Editing Timesheets

To edit a timesheet:

- 1) Click the **Timesheets** link in the Left Navigation bar, or select **Go To > Timesheets** from the Top Navigation bar.
- 2) Select **My Timesheets** from the *Quick Filters* pull-down menu and click **Go** to view your timesheets.
- 3) Select a week and click the **Edit** link.
- 4) Enter the Estimated Time to Complete (ETC) for each activity. If you are working with multiple team members on this activity, you should enter the ETC for your portion of the activity and not for the entire activity. This field is visible only if your Project Manager has enabled it.
- 5) Add a new note by entering it in the box provided.
- 6) Click **Save** to save the timesheet or click **Submit for Approval** to submit the timesheet for approval.

Approving Timesheets

If you are a Resource Manager or Project Manager, your responsibilities may include approving timesheets. The timesheets that require your approval are displayed on your **My Work** page, Timesheet Listing page, and Resource Listing page. If your Administrator has set the Timesheet Approval Settings to **Approve at Timesheet Level**, then the entire timesheet is approved or rejected, if set to **Approve at Timesheet Line Level**, then all open line items are approved or rejected. In addition, if you are a resource manager, you can approve project level line items only if you have the permission to do so.

Using My Work Page

To approve or reject timesheets from your My Work page:

- 1) Navigate to **My Work** by clicking the **My Work** icon on the Left Navigation bar, or select **My EnterpriseTrack > My Work** from the Top Navigation bar.
- 2) You will see a list of timesheets that require your approval. Select the timesheet you want to approve or reject. To view the timesheet details, click the **View** link.
- 3) Click **Approve** or **Reject**.
Or
Click the **Approve**, or **Reject**, icons and click **Submit**.
Or
You can also select individual line items to approve or reject. Select **Approve** or **Reject** from the *Status* column drop-down menu for each line item, and click **Submit**.

Using Timesheet Listing Page

To approve or reject timesheets from the Timesheet Listing page:

- 1) Click the **Timesheets** link in the Left Navigation bar, or select **Go To > Timesheets** from the Top Navigation bar.
- 2) Select the **Pending my approval** option from the **Saved Search: View** pull-down menu.
- 3) You will see a list of timesheets that require your approval. Select the timesheet you want to approve or reject. To view the timesheet details, click the **View** link.
- 4) Click the **Approve**, or **Reject** buttons and click **Submit**.

Using Resource Listing Page

To approve or reject timesheets from the Resource Listing page:

- 1) Click the **Resources** link in the Left Navigation bar, or select **Go To > Resources > Listing** from the Top Navigation bar.
- 2) Click the **Timesheets** tab. All timesheets that require your approval are displayed on this tab.
- 3) You will see a list of timesheets that require your approval. Select the timesheet you want to approve or reject. To view the timesheet details, click the **View** link.
- 4) Click the **Approve**, or **Reject** buttons.


Notes:

- You can only approve or reject items that are applicable to you.
 - An email notification is sent to the user when a timesheet is approved or rejected.
 - Based on your settings, you may see either **Approve** and **Reject** or **Approve All** and **Reject All** buttons.
-

Approving/Rejecting Multiple Timesheets

You can approve or reject multiple timesheets at the same time from your **My Work** page or the **Timesheet Listing** page. If your Administrator has set the Timesheet Approval Settings to **Approve at Timesheet Level**, then the entire timesheet is approved or rejected, if set to **Approve at Timesheet Line Level**, then all open line items are approved or rejected. In addition, if you are a resource manager, you can approve project level line items only if you have the permission to do so.

To approve/reject multiple timesheets from your **My Work** page:

- 1) Click the  **My Work** link from the Left Navigation bar, or select **My Work** from the Top Navigation bar.
- 2) Click to select the timesheets you want to approve/reject.
- 3) Click **Approve** or **Reject**.

To approve/reject multiple timesheets from the **Timesheet Listing** page :

- 1) Click the **Timesheets** link in the Left Navigation bar, or select **Go To > Timesheets** from the Top Navigation bar.
- 2) From the **Saved Search: View** pull-down menu, select the **Pending my approval** option.
- 3) Click to select the timesheets you want to approve/reject.
- 4) Click **Approve** or **Reject**.

Managing Timesheets

As a Timesheet Administrator you can use the **Manage Timesheet Settings** page to set a timesheet close period, reopen timesheet period for correction, and run timesheet status reports.

Note: You must have the **Manage Timesheet** permission to access the Manage Timesheet page.

Missing Timesheet Report

Use the Missing Timesheet Report to list users who have not submitted their timesheets for a given time period. The report output is in CSV and contains the following information: week start date, week end date, login ID, email address, first name, last name, and resource manager.

To view the missing timesheet report:

- 1) From the Left Navigation bar, click the **Timesheets** link and select **Administration**, or select **Go To > Timesheets > Administration** from the Top Navigation bar.
- 2) For the field **Start Date**, enter a date or click on the calendar to select a date. The Start Date is always the week start date.
- 3) For the field **End Date**, enter a date or click on the calendar to select an end date. The End Date is always the week end date.
- 4) Click **Run**.

What-if

Using this key module you can now view the effort (demand) associated with projects and the availability (or utilization) of the corresponding Resources (or Roles) side by side on the same screen. The What-if screen allows you to create scenarios where you can try out numerous what-if edits, in a dynamic and interactive way, to gauge the impact these changes will make on your projects or resource availability. The changes you can make include shifting delaying the projects/proposals; canceling projects/proposals and changing the required effort for a particular time period. These changes can be done at the Project level, the role level or at the resource level.

Each scenario starts off with setting filters that you can use to select a set of projects and proposals that are of interest. On the What-if screens you can view a comprehensive list of all resources associated with the projects that met your filter criteria. The resource requirements (effort, costs) of these projects and proposals (by month or week) are displayed in aggregate. You can drill down by expanding the lists.

Two views are shown – one by Resource at the top level and one by Role at the top level. Note that the What-if module only shows the efforts from the Allocation slots on the Projects and not from the efforts on resources assigned to activities in the WBS. You can create multiple such scenarios for comparison and you can share them with other team members. You can also refresh the scenario to reload real-time proposals/projects and role/resource allocations.

Note: The changes you make to projects in the What-If screen will not affect your actual projects.



The following list describes the menus, and control options you will see on the *What-if View Scenarios* screen:

- ▶ **Select Scenario:** From this pull-down menu, you can select from your saved or shared scenarios.
- ▶ **Scenario:** From this menu you can create, delete, save as, or refresh your scenarios. The *Save As* option makes a copy of your scenario. The *Clear All Changes* option clears all changes you have made. The *Refresh* functionality allows you to re-load real-time proposal/project and resource data as needed into an existing scenario, without losing the shifts that have been added.
- ▶ **Edit:** From the *Edit* menu you can make changes to the *General*, *Sharing*, *Filters*, and *What-if* tabs.
- ▶ **View:** From the *View* menu, you can display toolbars at the Top banner, and the Left Navigation bar. You can also save your settings.
- ▶ **Data:** From the *Data* menu, you can select the columns you want to view. You can also print and save to Microsoft Excel.

You will see the tabs listed below on the *What-if View* screen when you create or edit a scenario. The active tab is highlighted, and when you are in the Edit mode, the tab you are editing is highlighted. You can navigate to the other tabs but you can only edit the highlighted tab. The cells you can edit are highlighted in pink.

- ▶ **General Tab:** You can view and edit the name and description of the scenario. You can also select a default scenario.
- ▶ **Sharing Tab:** You can share the scenarios you have created with other team members using the Sharing tab.
- ▶ **Document Tab:** You can upload documents from this tab.
- ▶ **Filters Tab:** On this tab you can view and edit the filters used to create a scenario. You can use the extensive set of filters provided on this tab to narrow the projects and proposals you want to use to build your scenario. You can also select the time frame you are interested by selecting the dates and by selecting the time unit to display (months or weeks). You can also choose to include requested allocations and committed allocations while building your scenario. On this tab, you can set the columns you want to view on the What-if tab (effort, total capacity, the total utilization as a percentage, resource availability, the availability percentage, and the associated cost). You can also select what you want to see on the bottom grid of the What-if screen: availability by resource or availability by roles.

- ▶ **What-if Tab:** On this tab you can view and manipulate your scenarios by excluding projects, and by editing or shifting hours that a resource uses on a project. The columns you see on this tab are based on the options you selected in the *Filters* tab. When you are in the edit mode, the cells you can edit are highlighted in pink and the cell you are editing is also highlighted. As you make changes to the top half of the grid, you will notice instant changes to the bottom grid showing the impact of these changes. The Utilization, Utilization %, Availability, and Availability % columns are color coded (red, yellow, and green) based on built-in ranges. The scroll bar under each grid scrolls left to right within a page. Any changes you make on this tab will not affect your original projects.

Parameters/Controls	Description
Select date	You can select the date you want to view from within the time frame you set in the To and From Date filter.
	Allows you to page through columns. If you selected 6 columns per page and you have more than 6 columns then this clicking on this scroll buttons allows you to view the other columns by going to the next page. Both the top and bottom grids are always aligned by month (or week) even when they have different columns based on your filter settings.
	Expand and collapse a row.
Priority	The priority number of the project. This number comes from the evaluation score of the proposal.
Exclude	Shows projects or resources that are excluded. In the edit mode you can check this column to exclude a resource out of a project.
Shift	Allows you to shift a project by weeks or months.
E	The Allocation Effort. It is determined by the filters <i>Include Requested Allocation</i> and <i>Include Committed Allocation</i> . You can set it either one or both these filters.
CP	The total capacity.
U%	The total utilization as a percentage.
A	The resource availability.
A%	Availability percentage.
Cost	The associate cost.

- ▶ **Availability Tab:** You can view the resource and role availability from this tab. If the cell is highlighted red, it indicates that the resource is overbooked. A green highlighted cell indicates that the resource is under-utilized.

In This Section

Using What-if Planning	186
Creating a Scenario	188
Editing What-if Scenarios	189

Using What-if Planning

The What-if Planning module in EnterpriseTrack allows you to view, with the use of extensive filters, projects that are underway and the impact that these projects have on roles/resources. As Portfolio Managers you can use this module for Capacity Planning of Resources and also as a convenient way to see Resource utilization reports, which are similar to heat maps. Using this key module you can now view the effort (demand) associated with projects and the availability (or utilization) of the corresponding Resources (or Roles) side by side on the same screen. The What-if screen allows you to create scenarios where you can try out numerous "what-if" edits, in a dynamic and interactive way, to gauge the impact these changes will make on your projects or resource availability. The changes you can make include shifting delaying the projects/proposals; canceling projects/proposals and changing the required effort for a particular time period. These changes can be done at the Project level, the role level or at the resource level.

Each scenario starts off with setting filters that you can use to select a set of projects and proposals that are of interest. On the What-if screens you can view a comprehensive list of all resources associated with the projects that met your filter criteria. The resource requirements (effort, costs) of these projects and proposals (by month or week) are displayed in aggregate. You can drill down by expanding the lists.

Two views are shown – one by Resource at the bottom level and one by Role at the top level. Note that the What-if module only shows the efforts from the Allocation slots on the Projects and not from the efforts on resources assigned to activities in the WBS. You can create multiple such scenarios for comparison and you can share them with other team members. You can also refresh the scenario to reload real-time proposals/projects and role/resource allocations.

Note: The changes you make to projects in the What-If screen will not affect your actual projects.



The following list describes the menus, and control options you will see on the What-if View Scenarios screen:

- ▶ **Select Scenario:** From this pull-down menu, you can select from your saved or shared scenarios.
- ▶ **Scenario:** From this menu you can create, delete, save as, or refresh your scenarios. The Save As option makes a copy of your scenario. The Clear All Changes option clears all changes you have made. The Refresh functionality allows you to re-load real-time proposal/project and resource data as needed into an existing scenario, without losing the shifts that have been added.
- ▶ **Edit:** From the Edit menu you can make changes to the General, Sharing, Filters, and What-if tabs.

- ▶ **View:** From the View menu, you can display toolbars at the Top banner, and the Left Navigation bar. You can also save your settings.
- ▶ **Data:** From the Data menu, you can select the columns you want to view. You can also print and save to Microsoft Excel.

You will see the tabs listed below on the What-if View screen when you create or edit a scenario. The active tab is highlighted, and when you are in the Edit mode, the tab you are editing is highlighted. You can navigate to the other tabs but you can only edit the highlighted tab. The cells you can edit are highlighted in pink.

- ▶ **General Tab:** You can view and edit the name and description of the scenario. You can also select a default scenario.
- ▶ **Sharing Tab:** You can share the scenarios you have created with other team members using the Sharing tab.
- ▶ **Document Tab:** You can upload documents from this tab.
- ▶ **Filters Tab:** On this tab you can view and edit the filters used to create a scenario. You can use the extensive set of filters provided on this tab to narrow the projects and proposals you want to use to build your scenario. You can also select the time frame you are interested by selecting the dates and by selecting the time unit to display (months or weeks). You can also choose to include requested allocations and committed allocations while building your scenario. On this tab, you can set the columns you want to view on the What-if tab (effort, total capacity, the total utilization as a percentage, resource availability, the availability percentage, and the associated cost). You can also select what you want to see on the bottom grid of the What-if screen: availability by resource or availability by roles.
- ▶ **What-if Tab:** On this tab you can view and manipulate your scenarios by excluding projects, and by editing or shifting hours that a resource uses on a project. The columns you see on this tab are based on the options you selected in the Filters tab. When you are in the edit mode, the cells you can edit are highlighted in pink and the cell you are editing is also highlighted. As you make changes to the top half of the grid, you will notice instant changes to the bottom grid showing the impact of these changes. The Utilization, Utilization %, Availability, and Availability % columns are color coded (red, yellow, and green) based on built-in ranges. The scroll bar under each grid scrolls left to right within a page. Any changes you make on this tab will not affect your original projects.



Parameters/Controls	Description
Select date	You can select the date you want to view from within the time frame you set in the To and From Date filter.
	Expand and collapse a row.
	Provides additional information on the project.
Priority	The priority number of the project. This number comes from the evaluation score of the proposal.
Exclude	Shows projects or resources that are excluded. In the edit mode you can check this column to exclude a

	resource out of a project.
Shift	Allows you to shift a project by weeks or months.
E	The Allocation Effort. It is determined by the filters Include Requested Allocation and Include Committed Allocation. You can set it either one or both these filters.
CP	The total capacity.
U%	The total utilization as a percentage.
A	The resource availability.
A%	Availability percentage.
Cost	The associate cost.

- ▶ Availability Tab: You can view the resource and role availability from this tab. If the cell is highlighted red, it indicates that the resource is overbooked. A green highlighted cell indicates that the resource is under-utilized.

Creating a Scenario

To create a new What-if scenario, do the following:

- 1) Click the **What-if** link in the Left Navigation bar, or select **Go To > What-if** from the Top Navigation bar.
- 2) From the **Scenario** pull-down menu select **Create**. The *What-if Create Scenario* screen is displayed.
- 3) Select the *General* tab and enter a name and description for this scenario. You can also choose if you want this to be the default scenario.
- 4) Select the *Filter* tab. Click the **Expand All**  button to expand the filter categories. You can select the **Collapse All**  button to collapse the list. The filter list is either expanded or collapsed based on the settings selected by your Administrator.
 - a. From the **Display Options** section, select the time unit (Week or Month).
 - b. Enter the from and to dates. This is the time period you are interested in planning for.
 - c. From the *Availability display in What-if* pull-down menu, select if you want to view the availability of roles or availability resources in the What-if screen. What you select here is displayed in the bottom grid of the What If screen.
 - d. Choose if you want to include requested allocation and committed allocations.
 - e. Select the number of columns per page you want to view. If the time period you selected is 12 months and the columns per page is 6 then the scroll button is enabled. On the What-if screen you can use the scroll buttons to scroll to the next page for the other 6 columns.
- 5) Enter the options you want displayed in the *What-if* table. You can choose to view the efforts, capacity, utilization %, availability, availability %, and the resource cost. You can also select the number of rows per page.

- 6) Enter the options you want displayed in the *Availability by Roles* table. You can choose to view the efforts, capacity, utilization %, availability, availability %, and the resource cost. You can also select the number of rows per page.
- 7) Enter the options you want displayed in the *Availability by Resources* table. You can choose to view the efforts, capacity, utilization %, availability, availability %, and the resource cost. You can also select the number of rows per page.
- 8) You can further filter on pull down status, initiative, project basics, project dates, project organization hierarchy, project classification fields, finances, alignment tree, proposal classification fields, resource filterable custom fields, and resource organization hierarchy.
- 9) Click the **Save** button to save your scenario.

Editing What-if Scenarios

Shifting Projects/Proposals or Roles/Resources

You can shift projects, proposals, roles, or resources from the *What-if* tab on the *What-if View Scenarios* screen. Shifting projects/proposals allows you to dynamically see the roles/resource availability impact based on the shift. If a role's (e.g. QA Engineer) available capacity for one particular week is low, then shifting the project start date by a week could help free up the capacity of that role.

- 1) Select the scenario you are working on from the *Select Scenario* drop-down menu.
- 2) From the **Edit** menu select **What-if** to begin editing the *What-if* tab.
- 3) Ensure that you have a date range set in the filters for which your projects in the (upper) *What-if* grid has efforts associated with it (not all zeros). In the lower Grid, you can then see the resources and their effort, availability, and utilization (as set up by your filters).
- 4) From the top grid select the project/proposal or resource/role and enter the number of weeks or months under the *Shift* column. The change is immediately reflected in the table below. Shifts are integer units of months or weeks based on the column display set in the Filter. The project shift is absolute and always based on the start date. Role shifts are based on top of project shifts.
- 5) After you have finished making changes you can save the scenario by selecting **Scenario > Save**. You can also make a copy of these changes into a separate scenario using the Save As option (**Scenario > Save As**).

Excluding/Including Projects or Proposals

You can quickly exclude or include projects based on the evaluation score of projects/proposals. The least important projects/proposals can be excluded to ensure resources are available for more important projects/proposals.

- 1) Select the scenario you are working on from the *Select Scenario* drop-down menu.
- 2) From the **Edit** menu select **What-if** to begin editing the *What-if* tab.
- 3) In the lower Grid, you can then see the Resources and their Effort, Availability, Utilization (as set up by the filters). Look for a resource that is over-utilized – either with the utilization showing red or the Availability showing red. Now expand on that user to see what projects are causing the Red over-utilization.

- 4) From the upper grid manipulate that project by checking the **Exclude** column. You will see that this project and all its associated effort is grayed and italicized to show exclusion. The lower grid will immediately reflect the change.
- 5) After you have finished making changes you can save the scenario by selecting **Scenario > Save**. You can also make a copy of these changes into a separate scenario using the Save As option (**Scenario > Save As**).

Editing Hours

You can edit the resource hours within the grid to quickly see if there will be a resource impact and to see if there is enough capacity available for the time frame of interest.

- 1) Select the scenario you are working on from the *Select Scenario* drop-down menu.
- 2) From the **Edit** menu select **What-if** to begin editing the *What-if* tab.
- 3) In the lower Grid, you can then see the Resources and their Effort, Availability, Utilization (as set up by the filters). Look for a resource that is over-utilized – either with the utilization showing red or the Availability showing red.
- 4) From the top grid select the resource and change the effort associated with this resource for a selected timeframe. The grid below shows the impact in real time.
- 5) After you have finished making changes you can save the scenario by selecting **Scenario > Save**. You can also make a copy of these changes into a separate scenario using the Save As option (**Scenario > Save As**).

Global Reports

In This Section

Working with Standard Reports	190
User Defined Excel Reports	193
List of Pre-Defined Standard Reports	195
Working with Adhoc Reports	207

Working with Standard Reports

In This Section

About Standard Reports	191
Navigating the Reports Module	191
Running Standard Reports	192

About Standard Reports

EnterpriseTrack has a comprehensive reports package to cater to the needs of different types of users.

In installations with multiple initiatives on the same system, you can view cross-initiative reports as well as reports for each of the initiatives in the system. You will be prompted to select the initiative for the report you are running. To access the global reports, click on **Reports > Standard** from the Left Navigation bar, or by selecting **Go To > Reports > Standard** from the Top Navigation bar.

Note: For more information on working with reports, see the *Report User Guide*.

My Reports

These are reports that have been created by you. You can modify, share, schedule and email these reports.

Shared Reports

These are user created reports that have been shared by the creator of the report for use by one or more users. Project confidentiality settings are carried over into the shared reports. This means that only those projects that a user is allowed to view and work with will be included in the output data.

Pre-defined Reports

These reports are pre-defined in your system. Oracle recommends not making any changes to the reports under this folder. Changes made to pre-defined reports are not saved. If you need to make changes, you must first save a copy of the report under My Reports or Global Reports.


Custom Reports

These are reports that are customized for your system. The Custom Reports link will be displayed only if there are any custom reports configured for your system.

Navigating the Reports Module

The Manage Reports screen contains a Tree pane, List pane and a Details pane. You can use this screen to run and modify reports by changing the filter and output options. You can also view the report history, schedule and email reports.

 Use this icon to maximize the size of each pane.

 Use this icon to restore the pane to its original size.


Tree Pane

The Tree pane displays all the reports in the system. The reports are organized into folders.


- ▶ My Reports folder contains all the reports that you have created.
- ▶ Shared Reports folder contains all reports that have been shared by other.


- ▶ Pre-defined Reports folder contains all reports that have been already created in the system.
- ▶ Global Reports folder contains all the global reports.
- ▶ Custom Reports folder contains all reports that are customized for your system.

The tree pane displays the reports tree. In the My Reports sections of the tree you can create new nodes (i.e. folders) in the tree, cut, copy and paste elements of the tree and delete nodes from the tree using the buttons displayed on this pane.

 Use this icon to copy a node.



 Use this icon to cut a node.

 Use this icon to paste the node that you cut or copied.



 Use this icon to delete a node. Only user-created nodes within the My Reports section can be deleted. When a node is deleted, all its children (nodes) are also deleted.


 Use this icon to expand the complete tree.


List Pane


The List pane displays all the reports under a folder. Click on the report to view detailed information in the Details pane. The Run  button and the Run with Filters  button are displayed in each of the first two columns in the list pane.


Properties Pane

When you select a report, the *Details* pane contains a *General* tab, *Filter* tab, *Output* tab, *Schedule and Email* tab, *History* tab and a *Sharing* tab. You can expand the pane by clicking on the  **Maximize** button. To minimize the pane, click on the  **Restore** button.


 Click this icon to edit the properties.

 Click this icon to save the changes made to the properties.

 Click this icon to leave the properties unchanged.

 Click this icon to save this report in the My Reports section. The report will be saved with a new name. You can then use that report as a starting point to create your own report.

▶ Click this icon to run the report.

 Click this icon to edit the filters for the report and then run this report.

Note: If you have selected a node from the Tree pane, you will see its children in the List pane and its properties in the Properties pane. To view the properties of the child, you can click on its name in the list pane, or expand the node in the tree pane and then select the name of the child node.

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**.

User Defined Excel Reports

User-Defined Excel Reports (also referred to as Composite reports) combines 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 for all users and a source of the latest real-time data from across your entire organization on your projects and related information such as status, charters and finances). 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, or standard reports as inputs and you can choose to output it as an XLS or as a zip file. One or more report outputs can be inserted into separate sheets in Microsoft Excel. You can also view the history, email and share these reports.


In This Section

Creating User-Defined Reports 193

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.

List of Pre-Defined Standard Reports

In This Section

Listing Reports	195
Project Summary Reports	198
Project Detail Reports	200
Finance Reports.....	201
Resource Detail Reports	203
Timesheet Reports	205

Listing Reports

You can generate customized listing reports using the filter and output options.

Note: Your report may look different based on the filter and output parameters you selected.

Idea Listing Report

Based on your filters, this report displays all ideas in the system. It displays the idea number, title, status, description of problem/opportunity, division, business unit, primary contact, assignee, submission date, date accepted/rejected, and the evaluation score. The output choices are CSV and HTML.

Note: Depending on your configuration, the Project Request Listing is the same as the Ideas Listing Report label.

Project Request Listing

Based on your filters, this report displays all charter requests in the system. It displays the charter ID, name, status, project type, roadmap, division, business unit, manager, planned start date, actual start date, planned project close date, initial forecast benefits, initial forecast cost, and the evaluation score. The output choices are CSV and HTML.

Note: Depending on your configuration, the Project Request Listing is the same as the Ideas Listing Report label.

Project Listing

Based on your filters, this report displays all projects in the system. It displays the initiative, phase, status, plan, start date, program, and region. The output choices are CSV and HTML.

Note: If your project roadmap is a non-gated roadmap, then the Current Phase column in the report is not populated as non-gated roadmaps do not have a single current phase.

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 before the selected date. For example, if you select Finance, all projects that had finances updated on or before the last updated are displayed. The output choices are CSV, PDF and HTML.

Project Listing Report with Activity List

Based on your filters, this report displays all projects with the activity list. It displays the project details, and the project activity details like the type, name, status, number of attachments, and dates. The output choices are CSV, PDF and HTML.

Resource Listing

Based on your filters, this report displays all resources. It displays the name, resource type, email address, phone number, access profile, allowed roles, business unit, manager, and initiative. The output choices are CSV, PDF and HTML.

Project Status

Based on your filters, this report displays the status of projects. It displays the ID, name, status, team size, timesheet, related entities #, and activities #. The output choices are CSV and HTML.

Resource Status

Based on your filters, this report displays the status of resources. It displays the name, login ID, status, last login date, timesheet, last timesheet submission date, and related entities. The output choices are PDF and HTML.

Activity Detail Report

This is a detailed report on each activity associated with a project. You can filter on initiative, Labor Expense Types (LETs), labor expense categories, and all project activities 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. The output choices are CSV, HTML, PDF, and XLS.

Metrics Listing Report

Use the Metrics Listing report to display project metrics based on your filters. 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. The output choices are CSV, HTML, and PDF.

Project and Metrics Template

Use the Project & Metrics Template report to display project metadata and details of associated metrics. 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. You can select the output columns, the sort by column, and the sort order. The output choices are CSV, HTML, and PDF.

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 also display linked activities in the report output. The output choices are CSV, HTML, MS Excel, and PDF.

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. The output choices are CSV and HTML.

Alignment Tree Reporting

This report displays a list of all objects associated with an alignment. The available report format choices are CSV, MS Excel, and HTML.

Pipeline Report

Use the Pipeline report to list all fields that are mapped across ideas, proposals, and projects. You can also use this report to display common custom fields across entities. The output choices are CSV, HTML and MS Excel.

Program Listing Report

Use the Program Listing report to view basic information on a program and view the associated projects and proposals. The output choices are CSV, HTML and MS Excel.

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

Deleted Records Report

Use the Deleted Records report to view information on deleted entities. The output choices are CSV, HTML and MS Excel.

Linked Projects Report

Use the Linked Projects report to view all linked projects. The output choices are CSV, HTML and MS Excel.

Proposal Team Listing Report

Use the Proposal Team Listing Report to display a list of proposal team members with approval information, or the initial project team members with allocation information. The output choices are CSV and HTML.

Program Eval Report

Use the Program Eval Report to view detailed evaluation information on a program. The output choices are CSV, MS Excel, and HTML.

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 output choices are CSV, MS Excel, and HTML.

Project Summary Reports

You can generate customized project summary reports using the filter and output options.

Note: Your report may look different based on the filter and output parameters you selected.

Finance Summary Report

Based on your filters, this report displays the finance summary. Before running this report, you must choose a *Finance Template* and the *Finance Type (Plan or Actual)* from the *Filter* tab. The output choices are CSV, PDF and HTML.

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. The output choices are CSV, PDF and HTML.

Project Summary by Alignment Report

Based on your filters, this report displays the project summary by alignment. It displays the processes, 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. The output choices are CSV, PDF and HTML.

Project Summary by Project Source

Based on your filters, this report displays the finance summary by project source. It displays project source, project count (active and closed) and project finances. Before running this report, you must choose a *Finance Template* from the *Filter* tab. The output choices are CSV, PDF and HTML.

Project Summary by Program

Based on your filters, this report displays the finance summary by program. It displays programs, project count (active and closed) and project finances. Before running this report, you must choose a *Finance Template* from the *Filter* tab. The output choices are CSV, PDF and HTML.

Project Summary by External Factors

Based on your filters, this report displays the finance summary by external factors. It displays the external factors, project count (active and closed) and project finances. Before running this report, you must choose a *Finance Template* from the *Filter* tab. The output choices are CSV, PDF and HTML.

Project Summary by Process Area

Based on your filters, this report displays the finance summary by process area. It displays the external factors, project count (active and closed) and project finances. Before running this report, you must choose a *Finance Template* from the *Filter* tab. The output choices are CSV, PDF and HTML.

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* and *Resource Role* from the *Filter* tab. The output choices are CSV, PDF and HTML.

Closed Project Listing

Based on your filters, this report displays all closed projects. It displays the initiative, project number, name and close date and project type. The output choices are CSV, PDF and HTML.

Active/Close Project Report

Based on your filters, this report displays all active and closed projects. It displays the initiative, project number, name and close date and project type. It also displays the finances associate with the project. The output choices are CSV, PDF and HTML.

Project Detail Reports

You can generate customized detailed project reports using the filter and output options.

Note: Your report may look different based on the filter and output parameters you selected.

Project Listing Report with Activity List

Based on your filters, this report displays all projects with the activity list. It displays the project details, and the project activity details like the type, name, status, number of attachments, and dates. The output choices are CSV, PDF and HTML.

Project Listing by Role

Based on your filters, this report displays the projects by resource roles. It displays the project sponsor, project metrics, project ID, name, development activity dates, post implementation activity dates, implementation dates, stress/load testing days, usability testing days, testing days, analysis tool days etc. Before running this report, you must choose an *Initiative* and *Resource Role* from the *Filter* tab. The output choices are CSV, PDF and HTML.

Project Final Report

Based on your filters, this report displays the project final report. The output choices are PDF and HTML.

Project Review Report

Based on your filters, this report displays the aggregate project review report. It displays the project name, manager, financial representative, and detail information on each project activity. The output choices are PDF and HTML.

Project Control Report

Based on your filters, this report displays the project control report. The output choices are PDF and HTML.

Project Notes Report

Based on your filters, this report displays the project notes report. The output choices are PDF and HTML.

Project Issues Report

Based on your filters, this report displays the project issues report. The output choices are PDF and HTML.

Project Storyboard

Based on your filters, a project storyboard is created. You can choose to create a summary or detailed storyboard. The output option is MS PowerPoint. Follow the instruction under the *Help* tab to export project data to Microsoft PowerPoint. For more information on creating a storyboard, see topic Exporting a Storyboard to Microsoft PowerPoint.

Idea Evaluation Report

Based on your filters, this report displays the evaluation of all ideas in the system. The output choices are CSV, PDF and HTML.

Proposal Evaluation Report

Based on your filters, this report displays the evaluation of all charters in the system. The output choices are CSV, PDF and HTML.

Project Evaluation Report

Based on your filters, this report displays an evaluation of all projects in the system. The available report format choices are CSV, PDF and HTML.

Proposal Signoff Report

Based on your filters, this report displays the sign-off status for charter team members. The available report format choices are CSV, MS Excel, and HTML.

Project Alignment Report

Based on your filters, this report displays a list of all projects, their alignments, and alignment contribution. The available report format choices are CSV, MS Excel, and HTML.

Finance Reports

You can generate customized spreadsheet reports using the filter and output options.

Note: Your report may look different based on the filter and output parameters you selected.

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. The report output is in CSV format.

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

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. The output is in CSV format.

Note: You must first download the template before you can view the

output in MS Excel.

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. The output is in CSV format.

Financial Summary by Business Unit

This report displays the finance summary using the specified filter and output parameters. This report aggregates planned 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. The available report formats are: CSV, HTML, and PDF.

Project Finances 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 must choose a Finance Template. The output is in CSV format.

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 must choose a Finance Template. The report output format choices are CSV, HTML, and MS Excel.

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. Before running this report, you should choose a Finance Template. The report output format choices are CSV, HTML, and MS Excel.

Proposal Finances Element Monthly Detail

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

Finance Validation Report

You can generate a proposal finances element monthly detail report by using the filter and output options. This report shows multiple rows per proposal - 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. It displays only Plan values. Program filters are displayed only if the feature to allow Proposals in Programs is enabled.

Resource Detail Reports

You can generate customized detailed resource reports using the filter and output options.

Notes:

- Your report may look different based on the filter and output parameters you selected.
 - When running heatmap reports, you can choose to view or hide rows with zero values. From the **Output** tab, select **Yes** for the filter Hide Rows with Zero Effect. This filter hides zero values for the Allocation, Activity and Team/Overhead rows.
-

Resource Professional Certifications

Based on your filters, this report displays all the certificates received by resources. The output choices are CSV, PDF and HTML.

Resource Expertise/Skills

Based on your filters, this report displays the skills and expertise the resources have. The output choices are CSV, PDF and HTML.

Resource Assets

Based on your filters, this report displays the skills and expertise the resources have. The output choices are PDF, CSV and HTML.

Heat Map by Resource

Based on your filters, this report displays a heat map by resource. The output choices are HTML and CSV.

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. The output choices are HTML and CSV.

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.

Heat map by Project

Based on your filters, this report displays a heat map by project. The output choices are HTML and CSV.

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.

Resource Utilization Chart Report

Based on your filters, this report displays a heat map chart by resource. It shows the planned utilization % and the actual utilization % for all resources. The output choices are HTML and CSV.

Project Effort Chart Report

Based on your filters, this report displays a project effort heat map by project. It shows the planned and the actual effort. The output choices are HTML and CSV.

Heat Map by Resource CSV

Based on your filters, this report displays a heat map by resource. The output choices are HTML and CSV.

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 \$. The output choices are HTML and CSV.

Timesheet Reports

You can generate customized timesheet reports using the filter and output options.

Note: Your report may look different based on the filter and output parameters you selected.

Timesheet Reports by Project

Based on your filters, this report displays timesheet reports by projects. The output choices are CSV, PDF and HTML. 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.

Timesheet Reports by Resource

Based on your filters, this report displays timesheet reports by resource. The output choices are CSV, PDF and HTML.

Timesheet Detail Report

This is a detailed report of timesheets. You can filter by Pull-down Status, Initiative, Timesheet Basics, Project Basics, Project Organization Hierarchy, Resource Basics, Resource Organization Hierarchy, Resource Filterable Custom Fields, Finances, Program, and Output Custom Fields.

You can also set the following output 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 the actual effort aggregated for a requested time period. The output choices are CSV, HTML, and MS Excel.

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 to users that have the required permissions to view cost information.
- If the correction dates are specified, the output will display correction reports. If correction dates are not specified, the output will display timesheet time and cost. If both correction dates and timesheet dates are specified, the corrections reported will be for the timesheets filed within the specified timesheet dates.
- 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.

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. The output choices are CSV, PDF and HTML.

Timesheet Corrections Report

Based on your filters, this report shows the timesheet correction data. The output choices are CSV, MS Excel, PDF and HTML.

Working with Adhoc Reports

In This Section

Working with Predefined Templates	207
Creating My Reports	208
List of Ad-hoc Reports	208

Working with Predefined Templates

EnterpriseTrack provides you with several pre-defined reports templates that you can run as is, or modify to suit your needs. You can use filters to search for reports based on report name and description and the name of the person who created the report.

Using pre-defined templates

- 1) Click on the **Reports** link in the left navigation bar.
- 2) Click on the **Ad Hoc reports** link
- 3) In the list of Predefined Report Templates, locate the type of report you want to run.
- 4) To view the details of the fields included in each report, click the **Edit** link in the **Action** column.
- 5) To run the report using the default setting, click the **Run** link in the **Action** column. On the **Run Ad-hoc Report** page, click the **Run Report** button.
- 6) You can also click the **Run Report** button displayed when you click the **Run Test Report** tab on the **Edit...Report** page.

Creating My Reports

You can personalize the pre-defined report templates in the Adhoc reports section and save them for future use. These reports are categorized as My Reports within EnterpriseTrack.

To edit the predefined template

- 1) Click on the **Reports > Ad hoc** link in the left navigation bar, or select **Go To > Reports > Ad-hoc** from the top navigation bar.
- 2) In the list of Predefined Report Templates, locate the type of report you want to run.
- 3) To view the details of the fields included in each report, click the **Edit** link in the **Action** column.
- 4) On the **Edit...Report** page, modify the name, description and output format (comma separated values, html or pdf) on the **General** tab.
- 5) Select the required parameters on the **Parameters** tab.
- 6) The **column selection** tab allows you to choose the column you wish to include in the report. You can also change the order in which the column appear by selecting a column name and clicking the **Move up** or **Move down** buttons.
- 7) On the **column details** tab you can change the names and descriptions of the column. This will only affect the text that is displayed in the Report.
- 8) Specify your sorting preferences in the **Sorting** tab. The Adhoc reports support case-sensitive sorting in both ascending and descending order.
- 9) To run a test report, click the **Run Test Report** tab and click the **Run Report** button.
- 10) To save the modified template for future use, click the **Save As...** button. Enter a name and description for the report and click the **Save** button

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.

Report Name	Description/Purpose
Project Listing Report	Displays project details including a list of key team members.
Project Template	A template for project reports. Note: If your project roadmap is a non-gated roadmap, then the Current Phase column in the report is not populated as non-gated roadmaps do not have a single current phase.
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.

Messages

In This Section

Working with Messages.....	209
Creating a Message	210

Working with Messages

EnterpriseTrack allows users with appropriate permissions to send broadcast messages to other users in the system. Messages can be sent to users based on their access profile. You can also choose to send messages to all users who are part of one or more initiatives. Messages can be set to expire at a specific time. Expired messages are stored in the system and can be accessed through the user-interface.

Recipients of the message will be able to view their messages in the **My Messages** section of EnterpriseTrack.

By default the **Messages** page displays all your unexpired messages. You can view expired messages by clicking the check box next to **Display Expired Messages** and clicking the **Go** button. To view messages created by someone other than you, click the check box next to **Display Messages Created By Others** and click the **Go** button.

Creating a Message

- 1) To create a new message, navigate to the **Messages** section by clicking the **Messages** link in the Left Navigation bar, or select **Go To > Messages** from the Top Navigation bar.
- 2) Click the **Create a New Message** button.
- 3) On the Create Message page select the access profiles of the users to whom you want to send the message. If no access profile is chosen, the message will be sent to all users irrespective of their access profile.
- 4) Select the initiative with which you want to associate this message. When you select an initiative, only users who are part of that initiative will receive the message. If no initiative is chosen, the message will be sent to users irrespective of the initiative with which they are associated.
- 5) Type the content of your message in the Message Description field.
- 6) You can also attach a document to your message. Users will be able to view and download attached documents.
- 7) You can set a time and date when then message will expire. Once a message expires, it will not be displayed in the My Messages page.
- 8) Click the **Save** button to create and send your message.

Surveys

In This Section

Survey Reports	210
Creating a Survey Instance	211
Administering Surveys.....	211

Survey Reports

EnterpriseTrack comes with standard survey reports that allow you to view and analyze the responses.

To view the survey reports, navigate to the Survey Management section by clicking on the **Survey Management** link in the left navigation bar. From the sub-menu in the left navigation bar, select the **Reports** option. You can also view survey reports by selecting **Go To > Survey Management > Reports** from the Top Navigation bar.

The following reports are available:

- ▶ **Summary and Detail Reports:** You can view summary and detailed information about responses using this report.

- ▶ Respond Trend report: The output for this report is a bar chart showing the trend in the responses for the selected surveys.
- ▶ Average Response: The output for this report is a bar chart showing the response averages for the selected surveys.

When you click the **Run** link, for any of the above reports, you can choose the date range over which the survey was run, the template for which you would like to run the report and the survey instances you want included in the report, based on status.

Creating a Survey Instance

Before you create a survey instance, make sure that the survey template you want to use for this particular survey has already been created. The survey template contains the actual questions and the rating groups to be used in the survey.

- 1) Click the **Create Survey Instance** button on the **Survey list** page.
- 2) On the Create Survey page enter a name for the survey.
- 3) Select the Survey template to be used in the survey.
- 4) Enter the date on which you want to conduct the survey. Emails will be sent out to the recipients on this date.
- 5) You can enter an expiry date for the survey. If you define an expiry date, recipients of the survey will not be able to submit responses after this date.
- 6) You can define the total number of recipients for the survey as well as the minimum number of responses that are required for the survey to be considered in reports.
- 7) Select the name of the recipients from the **Available Users** list (Control-click to select multiple names).
- 8) Click the **Create** button to create your survey.

Administering Surveys

In This Section

Managing Templates.....	211
Managing Questions	212
Managing Rating Groups.....	213

Managing Templates

Survey templates define the questions and the rating groups that make up the individual surveys. Templates can have multiple sections, each with its own group of questions and rating group. The individual questions and rating groups must already be created before you can use them in your survey template.

On the Survey Templates page you can edit, delete, deactivate and preview the templates.

Creating a New Survey Template

Before you create a new survey template, make sure you have created the questions and the rating groups.

Once you have created these, you can create the survey template.

- 1) To begin creating a survey template click the **Admin** link in the Left Navigation Bar or select **Go To > Survey Management > Admin** from the Top Navigation bar.
- 2) Click the **Manage templates** link.
- 3) Create the **New Survey Templates** button.
- 4) Enter the Survey template name. You can also add headers and descriptions.
- 5) Click the **Add Section** button.
- 6) Enter a section name.
- 7) Select the questions from the **Available Questions** menu.
- 8) Select the rating group for the section.
- 9) Continue to add sections and click the **Create Survey Template** to save your changes.

Editing a Template

- 1) Click the **Edit** link in the Action column of the template you wish to edit.
- 2) On the Edit Survey template page, you can modify the questions each section by using the **Available questions** menu.
- 3) You can modify the order in which the questions are displayed in each section by clicking on the question (in the **Selected Questions** menu control) and then clicking the **Move Up** or **Move down** button as needed.
- 4) Modify the rating group for each section by selecting the one you want from the Rating group pull-down menu.
- 5) Add a new section by clicking the **Add Section** button at the bottom of the page.
- 6) Each section must have at least one question and a rating group for the answer to the question.

Deleting and Deactivating a Template

To delete the template:

- 1) Click the **Delete** link in the Action column of the template you wish to delete.
- 2) Click the **Preview** link to view what the survey will look like to recipients.

Managing Questions

Survey templates are made up of individual questions that are grouped into sections. EnterpriseTrack comes with a question bank to get you started. You can modify the existing questions by editing them. You can also use the **Save As** function to create new questions that are similar to the existing ones.

On the Questions page you can edit, delete and deactivate individual questions. Deactivated questions will not be available for use in survey templates.

Creating a New Question

To create a new question:

- 1) Select **Go To > Survey Management > Admin** from the Top Navigation bar.
- 2) Click the **Manage Questions** link.
- 3) Click the **Create a New Question** button.
- 4) Enter a short name for the question. This is only for internal use within the system.
- 5) Enter a long name for the question. This is the field in which you should enter the complete text of the question as you want it to be on displayed in the survey.
- 6) Click the **Create** button to save your changes.

Editing a Question

- 1) Click the **Edit** link in the Action column of the question you wish to edit.
- 2) Make the required changes on the Edit Question page and click the **Save** button to save your changes.

Deleting and Deactivating a Question

To delete the question that you created click the **Delete** link in the *Action* column of the question. Questions that come with EnterpriseTrack cannot be deleted.

You can also retain the question but not have it be active and available by clicking the **Deactivate** link. Deactivated questions can be reactivated by users with the required permissions.

Managing Rating Groups

Rating groups are the rating scales that are used by the recipient of the survey to respond to the questions and statements that make up the survey. EnterpriseTrack allows you to create multiple rating groups that can be used within the same survey. You can create multi-point Likert scale like rating groups, or you can create simple Yes/No rating groups. Each item in the group should have a rating point associated with it to allow the system to weigh the response appropriately. You can use the order number to define the order in which the rating item should appear on the survey.

On the Rating Groups page you can edit, delete and deactivate individual rating groups. Deactivated rating groups will not be available for use in survey templates.


Creating a New Rating Group

To create a new rating group:

- 1) Select **Go To > Survey Management > Admin** from the Top Navigation bar.
- 2) Click the **Manage Rating Groups** link.
- 3) Click the **Create a New Rating Group** button.
- 4) Enter a name for the group and enter the individual items.
- 5) Enter a label for each item and the rating point assigned to it. Both the label and the points will be displayed in the survey.
- 6) Set the sort order for each item.
- 7) Click **Save** to create the group.

Editing a Rating Group

To edit a rating group:

- 1) Click the **Edit** link in the Action column of the rating group you wish to edit.
- 2) Make the required changes on the **Edit Rating Group** page.
- 3) To delete a particular rating item, click  **Delete**.
- 4) To add new items to the list, click the **Add Item** button.
- 5) Click the **Save**.

Deleting and Deactivating a Rating Group

To delete the group that you created click the **Delete** link in the Action column of the rating group.

You can also retain the group, but not have it be active and available by clicking the **Deactivate** link. Deactivated groups can be reactivated by users with the required permissions.

Advanced Features

In This Section

Working with Multiple Currencies	214
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Working with Multiple Currencies

EnterpriseTrack allows you to configure your system to work with multiple currencies. If your system has been configured for more than one currency you can choose the currency that should be used for all financial data for a project.

If no currency is chosen, the base currency defined for your system will be used.

Contact your administrator for more information on working with multiple currencies.

EnterpriseTrack Mobile

In This Section

Downloading and Configuring the Mobile App 215


Downloading and Configuring the Mobile App

To download and configure the mobile app:

- 1) Log in to the Instantis EnterpriseTrack web application.
- 2) From your user profile link menu on the EnterpriseTrack web application, select **Get EnterpriseTrack Mobile**.
- 3) From the **Download the App** section, click the **Email me Link** to have the app store link sent to your email.
- 4) Click the link sent to your email and follow the directions to download the app on to your mobile device.
- 5) Open the Instantis EnterpriseTrack app on your mobile device.

Logging in With SSO

To log in for the first time:

- 1) Tap  **EnterpriseTrack**.
- 2) On the End User License Agreement page, tap **Agree**.

Entering Account Information

You can either manually enter your account information or scan the QR code displayed on your Instantis EnterpriseTrack web application.

To scan account information:

- 1) Tap **Scan Account Information**.
- 2) Scan the QR code displayed on your Instantis EnterpriseTrack web application (**user profile link >Get EnterpriseTrack Mobile**) with your device.
- 3) Tap **Save**.

To manually enter account information:

- 1) In the **URL** field, enter the URL of your organization's EnterpriseTrack server.
- 2) In the **Account Name** field, enter your account name.
- 3) Slide the **Single Sign On** bar to the right.
- 4) In the **Additional Single Sign On Hosts** field, enter the additional host names used for your single sign on deployment and tap **OK**. User semi colon separators.


- 5) Tap **Save**.

Entering your SSO Credentials

- 1) Enter your SSO login ID and password.
- 2) Tap **Login**.

Logging in Without SSO

To log in for the first time:

- 1) Tap  **EnterpriseTrack**.
- 2) On the End User License Agreement page, tap **Agree**.

Entering Account Information

You can either manually enter your account information or scan the QR code displayed on your Instantis EnterpriseTrack web application.

To scan account information:

- 1) Tap **Scan Account Information**.
- 2) Scan the QR code displayed on your Instantis EnterpriseTrack web application (**user profile link > Get EnterpriseTrack Mobile**) with your device.
- 3) Tap **Save**.

To manually enter account information:

- 1) In the **URL** field, enter the URL of your organization's EnterpriseTrack server.
- 2) In the **Account Name** field, enter your account name.
- 3) Tap **Save**.

Entering your Credentials

- 1) Enter your EnterpriseTrack Login ID and password.
- 2) Tap the check box next to the preference you want to select.
- 3) Tap **Sign In**.

Using the Idea Portal

From the **Ideas** home page you can submit an idea, check the status of your ideas, and search other ideas.

In This Section

Submitting an Idea	217
Searching for Ideas	217
Policies and Procedures.....	217

Submitting an Idea

To submit an idea:

- 1) From the **Ideas Home** page, click the **Submit your Idea** button. The *Submit Your Idea* page is displayed.
- 2) Enter a title. Each idea must have a unique title within the system (30 char max length).
- 3) Enter the first and last name of the submitter.
- 4) In the *Idea Details* section, you can choose the organizational unit under which this particular idea should be included. If a specific hierarchy is being enforced within your system, the page will refresh to update the appropriate pull down menus.
- 5) Your administrator may have created custom fields for ideas. Enter the relevant information in these fields.
- 6) Click **Add Idea** to create a new idea. Once an idea is created it will follow the workflow that has been set by your Administrator.

Searching for Ideas

To search ideas:

- 1) From the **Ideas** home page, click the **Search Ideas** button. The *Search Ideas* page is displayed.
- 2) Enter a search keyword, the name of the idea it is linked to, or the area of concern.
- 3) Click **Search**.

Policies and Procedures

The **Policies and Procedures** page displays all documents from the Knowledge Base that are defined as Policies and Procedures.

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Oracle Instantis EnterpriseTrack User Guide

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