What's New
New Features in Instantis EnterpriseTrack 18

Features introduced in 18.11

Strategy Support for Programs: The Programs module supports the association of Strategies (Alignment) to a Program. View, add, edit, or delete one or more Strategies (Alignments) to a Program from either the Edit Program page or from the Programs tab within the Details pane of Strategy (Alignment) node. In addition, view details of the associated Program in a list or chart from the View Details link on the Programs tab within the Strategy node. The Alignment Details report under the Reports tab is enhanced to include Program-related filters and output fields. Two new permissions are added to the Alignment module (View Program Alignment to Alignment (#) and Align (Alignment (#) to a Program).

Alignment Tree Report Enhancement: The Alignment Tree report is enhanced to display additional Program filters and the output displays Program related fields.

BI Publisher Enhancement: The Manage Reporting Data Model page is enhanced to support exporting the following entities: Timesheet Summary, Timesheet Detail, Timesheet Corrections, and Timesheet Notes.

Deleted Records Report Enhancement: The Deleted Records report is enhanced to also display deleted timesheets.

Feature introduced in 18.10

Program Date Section: A Date section is added to the Program Listing page, containing the following four fields: Planned Start Date, Planned Completion Date, Actual Start Date, and Actual Completion Date. These fields are also displayed when you create, view, or edit a program in the Program Search and Advanced Search pages, and in the Program Listing and the Program non-WBS Activity reports.

Features introduced in 18.7

Program Evaluation Criteria: Administrators can use the Configuration Workbench to configure evaluation criteria for Programs. Administrators can add or edit matrices in Install and Reconfigure mode. Each matrix can be associated with one or two dimensions, and each dimension can have multiple evaluation criteria. The total weight of the dimensions must equal 100 %, when the weight of a dimension is changed, the weight of the other dimension is automatically updated. After configuration by administrators, users can select an evaluation matrix when creating or editing programs. The ability to create, view, and edit evaluation criteria are controlled by permissions and feature settings.

New Standard Reports: Two standard reports are added under Listing Reports: Program Eval Report and the Non-WBS Activity Report. Use the Program Eval report to view a detailed list of evaluation criteria defined for a Program. Use the Non-WBS Activity report to view a detailed list of all non-WBS activities, risks, and issues associated with a program. The output format for both reports are MS Excel, HTM, and CSV.

Program Non-WBS Activities: Administrators can use the Program Activity Types link in Install or Reconfigure mode to create, enable, or disable non-WBS activities to use in Programs They can also enable or disable the two predefined program activity types: Issues and Risks. The configured non-WBS activities, issues, and risks are displayed in the My Work page, the left navigation bar and in the top navigation bar under the Program (#) module menu. Users can then add, edit, or delete non-WBS activities, issues, or risks to associate with a Program. The ability to create, add, view, or edit activity types are controlled by settings and permissions.

Program Documents: You can add, modify, and delete documents to associate with Programs. These documents can be locked and also set to publish as a best practice document in the Knowledge Base node of the application. The ability to add, view, and delete documents are controlled by settings and permissions.

Features introduced in 18.5

Enhanced HeatMap Filters: New option to allow users to filter out closed projects when viewing Heat maps.

Managing Personally Identifiable Information: Features have been added to Instantis EnterpriseTrack that enable users to manage personally identifiable information, including creating consent notices, auditing consent status, and controlling access to EnterpriseTrack.

Enhanced Project Detailed Finances: Choose to display fiscal year totals and/or project finance for both monthly and yearly display modes.

Features introduced in 18.3

Last Updated Date Enhancement: The Last Updated Date is updated when team members are deleted or when team member allocations are updated.

Deleted Records Report Enhancements: The Deleted Records report is updated to show the Login ID of deleted resources. The Login ID is displayed in the Additional Information column. In addition, the report is updated to show the initiative for applicable entities. For deleted Projects and Proposals, the system only displays entities that match the initiative of the logged in user.

Enhanced Formatting for User-Defined and Pre-Defined Fields: The formatting is updated for user-defined and pre-defined fields when displayed in CSV and XLS formats.

Non-WBS Activity Report Enhancement: The Activity ID column is added to the Non-WBS Activity Report and it displays the internal ID of the activity.

Enhanced Project Detailed Finances: Two new filters are added to the Project Detailed Finances page. Choose to display fiscal year totals and/or project finance totals.

Features introduced in 18.2

Standard Report Improvements: The Hours Per Week column is added to the output of the Resource Listing Report. It displays the hours per week a resource can work and is taken from the resource calendar. The Last Updated Date Filter is added to the Charter/Proposal Signoff Report.

API Enhancements: The Proposal Finance Search and Project Finance Search APIs are modified to display proposal/ project details in the output when the value of the finances is 0.

Features introduced in 18.1

Custom Field Enhancements: Added support for statements and notes section to project custom fields.

Program Module Permissions: Three permissions are added to control the visibility of the following sections: Statements and Notes, Organization, and Budget when creating, viewing, or editing Programs.

Legal Notices

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