

Oracle
Instantis EnterpriseTrack

Data Dictionary

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Introduction

This data dictionary defines fields used in EnterpriseTrack.

Data Dictionary

Symbols & Numeric

% Complete (Project) Percent Complete (Project)

% Complete (Project) Percent Complete (Project)

The percentage completion of your project. Calculation is based on the project completion type that is chosen.

% utilizations

% utilizations

The percentage of a resource's time that will be utilized on a project.

A

AC (hours)

AC (hours)

The actual effort for resources.

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)

AC/CP (Percent)

The actual utilization as a percent.

Access Profile

Access Profile

The resource access profile associated with a resource.

Resource access profiles allow you to define global (non-project specific) permissions within the system. All resources assigned to a resource system access profile have all the global permissions associated with their selected access profile.

Actual

Actual

The units or funds actually expended in association with project work.

Actual Completion Date (Activity)

Actual Completion Date (Activity)

The date on which the work on an activity was completed.

Actual Effort (hours) (Project)

Actual Effort (hours) (Project)

The number of hours that was spent on a project.

Actual Effort (Timesheet) (hours) (Project)

Actual Effort (Timesheet) (hours) (Project)

The number of hours that was spent on a project as reported from resource timesheets.

Actual Effort Type

Actual Effort Type

Determines how the actual effort for an activity is calculated.

The options include: **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**, or **Effort at Resource Level From Finances**.

Actual Project Close Date

Actual Project Close Date

The date on which the project closed.

Actual Project Start Date

Actual Project Start Date

The date on which work on the project started.

Actual Realization Date

Actual Realization Date

The date on which the benefits of the project will be realized.

All Months Locked Globally

All Months Locked Globally

Determines whether all months are locked globally.

If set to **Yes**, a global finance lock has been set by the finance administrator and financial data at project level cannot be updated.

Allocation End Date

Allocation End Date

The date on which the allocation for a resource to work on a project ends.

Allocation Start Date

Allocation Start Date

The date on which the allocation for a resource to work on a project begins.

B

Baseline Effort (Project)

Baseline Effort (Project)

The initial effort associated with a project when it begins.

Benefits

Benefits

The benefits category defined in the default finance template.

The name of this category is configurable and is dependent on the finance template you selected. If your project uses a single view finance template, then this category is prefixed with the word Budget.

Benefits from Improvement (Idea)

Benefits from Improvement (Idea)

The benefits of implementing the idea.

The display name is configurable and has no set definition. Your administrator sets the name during installation, and can map this to a proposal statement field which is then carried over to projects.

C

Calculated Planned Project Close Date (Calculated Planned Realization Date)

Calculated Planned Project Close Date (Calculated Planned Realization Date)

The Calculated Planned Project Close Date for the project.

The system calculates this based on the estimated duration of all the phases in your project roadmap.

Calculated Planned Project Start Date

Calculated Planned Project Start Date

The calculated planned project start date for the project.

The system calculates this based on the estimated duration of all the phases in your project roadmap.

Calendar

Calendar

The type of calendar used. The calendar options are set by your administrator.

CM (hours)

CM (hours)

The approved/committed effort for resources.

When Requested Effort (RQ) is approved it becomes committed effort. RQ can be approved in full or partial. If a resource role doesn't require an approval, then as soon as effort is allocated it becomes committed effort.

CM/CP (Percent)

CM/CP (Percent)

The committed effort as a percent of capacity.

Cost

Cost

The cost category defined in the default finance template.

The name of this category is configurable and is dependent on the finance template you selected. If your project uses a single view finance template, then this category is prefixed with the word Budget.

CP (hours)

CP (hours)

The resource capacity.

This is calculated as 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.

Currency Code

Currency Code

The code for the project currency.

Current Fiscal Year

Current Fiscal Year

The financial totals for the current fiscal year to date.

Current Stage Current Phase

Current Stage Current Phase

The current stage or phase of your project. This is based on the roadmap you selected for your project.

Current Stage Order ID

Current Stage Order ID

The unique order identifier of the current stage

Cycle Time

Cycle Time

The project cycle time.

Project cycle time is computed from either project duration or from summation of cycle times at top level activities and is set by your administrator.

D

Default Finance View

Default Finance View

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.

Deliverable % Completion

Deliverable % Completion

Determines how the deliverable completion is calculated.

The options include: **Duration-Based**, **Effort-Based**, **Count-Based Immediate children**, **Count-Based All Children**, **Manual**.

Dependency Type

Dependency Type

The type of dependency.

You can select the dependency type to be either **Finish to Start** or **Offset**.

Description of Problem/Opportunity (Idea)

Description of Problem/Opportunity (Idea)

The description of the problem or opportunity that the idea will address.

The display name is configurable and has no set definition. Your administrator sets the name during installation, and can map this to a proposal statement field which is then carried over to projects.

Division (Level 1)

Division (Level 1)

The first level of your organization hierarchy.

The options you see are set by your administrator.

Duration-Based % Completion

Duration-Based % Completion

Determines how the duration-based completions should be calculated.

You can choose from the following options: **Actual VS Planned Duration-Self**, **Actual VS Planned Duration-Immediate Children**, **Actual VS Planned Duration-All Children**, and **Manual/External**.

E

Effort-Based % Completion

Effort-Based % Completion

Determines how the effort-based completions should be calculated.

You can choose from the following options: **Actual VS Planned Duration-Self**, **Actual VS Planned Duration-Immediate Children**, **Actual VS Planned Duration-All Children**, and **Manual/External**.

Enable Versioning checkbox

Enable Versioning checkbox

Determines whether versioning is enabled on proposals.

When this check box is selected, all versions of the proposal are saved. When a proposal is promoted to a project, this check box is automatically enabled.

Estimate Time to Complete

Estimate Time to Complete

The estimated time (in hours) to complete the project activity.

Expected Remaining Effort (hours) (Project)

Expected Remaining Effort (hours) (Project)

The expected remaining effort (in hours) to complete the project activity.

This is based on the Plan Effort minus the Actual Effort.

F

Finance Approval Template

Finance Approval Template

The finance approval template used in your project. The allowed templates are set by your administrator.

Finance Edit Mode

Finance Edit Mode

The mode in which finances are edited or tracked.

This value is set in the finance template by your administrator. Option include **Monthly**, **Yearly**, or **Aggregate**.

Finance Element Types

Finance Element Types

The type of finance elements defined in your project.

For example: Man Hours. These element types allow you to use financial and non financial inputs to calculate financial savings.

Finance Template Description

Finance Template Description

The finance template used in your project. The allowed finance templates are set by your administrator.

Finance Tracking Months

Finance Tracking Months

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.

Finance Tracking Start Date

Finance Tracking Start Date

The date to start tracking finances.

Fixed

Fixed

The Plan and Actual fixed costs for a project activity.

Forecast

Forecast

The expected units or funds that will be expended in a project.

It contains a combination of Plan and Actual values. The cutoff date where plan values end and actual value begins is configurable.

Forecast Cutoff

Forecast Cutoff

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.

Forecast to Actual

Forecast to Actual

The variance between Forecast and Actual values.

For double-view templates, you can view the variance between Forecast or Snapshot values and Actual values. For single-view templates, only Snapshot values are used to calculate the variance.

Forecast to Plan

Forecast to Plan

The variance between Forecast and Plan values.

For double-view templates, you can view the variance between Forecast or Snapshot values and Plan values. For single-view templates, only Snapshot values are used to calculate the variance.

Functional Area

Functional Area

The functional area associated with your project.

Functional areas are used to classify projects. The options you see are set by your administrator.

G

Global Lock Month

Global Lock Month

The global finance lock month.

Global lock month can be changed by finance administrators.

Group4

Group4

The Group 4 category defined in the Default Global Finance Template.

The name of this category is configurable and is dependent on the finance template you selected. If your project uses a single view finance template, then this category is prefixed with the word Budget.

Group5

Group5

The Group 5 category defined in the default finance template.

The name of this category is configurable and is dependent on the finance template you selected. If your project uses a single view finance template, then this category is prefixed with the word Budget.

I

Import Finances from MS Excel

Import Finances from MS Excel

Determines whether finances should be imported from MS Excel.

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 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.

Initial Start Date

Initial Start Date

The initial start date of a project.
This date is carried over from the proposal.

Initiative list

Initiative list

The initiative or group that an idea, proposal, project, or resource is associated with. Initiatives are defined during installation. You can associate an EnterpriseTrack deployment with one or more initiatives.

Input 1 for ROI

Input 1 for ROI

The first input finance category or subcategory to calculate the ROI value.

Input 2 for ROI

Input 2 for ROI

The second input finance category or subcategory to calculate the ROI value.

Input for NPV/IRR

Input for NPV/IRR

The categories or subcategories used to calculate NPV and IRR values.

IRR

IRR

The return rate which can be earned on the invested capital, i.e. the yield on the investment. It is defined as any discount rate that results in a net present value of zero of a series of cash flows. Formula for IRR: $\text{value} * (1 + (\text{monthly wacc}/100)) ^ (-\text{months})$.

Is Critical Activity

Is Critical Activity

Determines whether the activity is a critical activity.

K

Keep Submitter Details Confidential option

Keep Submitter Details Confidential option

Determines whether the details of the idea submitter are confidential. When the check box is selected, the submitter's details are not displayed on the listing page and reports.

L

Labor Expense Type

Labor Expense Type

The type of labor expense category attributed to project activities.

LETs are associated with a finance expense category (Capital Expense or Operational Expense).

Labor Overtime

Labor Overtime

The overtime labor rate for a resource.

Labor Rates

Labor Rates

The type of labor rate to use for a resource.

You can set a resource to use either the resource rate or role rate.

Labor Standard

Labor Standard

The standard labor rate for a resource.

Level 2 (Business Unit)

Level 2

The second level of your organization hierarchy.

This field may be set as a required field by your administrator.

Level 3 (Location)

Level 3 (Location)

The third level of your organization hierarchy.

The option you can select is based on the value you selected for Level 2.

Level 4 (Region)

Level 4 (Region)

The fourth level of your organization hierarchy.

This is an optional field. The option you can select is based on the value you selected for Level 3.

Level 5 (Business Sub-Unit)

Level 5 (Business Sub-Unit)

The fifth level of your organization hierarchy.

This is an optional field. The option you can select is based on the value you selected for Level 4.

Local Lock Month

Local Lock Month

The local project lock month and year.

Finance representatives can update project level lock month as they validate their projects to ensure that realized/actual finances are reflected correctly in financial rollups.

M

Material

Material

The Plan and Actual material costs for a project activity.

Measurable

Measurable

The measure to define the impact or value of an idea.

The display name is configurable and has no set definition. Your administrator sets the name during installation, and can map this to a proposal statement field which is then carried over to projects.

N

NPV

NPV

The excess or shortfall of cash flows, in present value (PV) terms, once financing charges are met.

By definition, $NPV = \text{Present value of net cash flows}$. Formula for NPV: $\text{value} * (1 + (\text{monthly wacc}/100)) ^ (-\text{months})$ Where wacc is the cost_of_capital months. The number of months between the fin track start date and the month_date for each of the rows returned by the query.

P

Percent Completion Type

Percent Completion Type

Determines the way in which the application calculates the percent complete for an activity.

Options include: **Manual Mode**, **Effort-based (Actual vs Planned Effort Immediate Children)**, **Effort-based (Actual vs Planned Effort for All Children)**, **Effort-based (Planned Completed vs Total Planned Effort for Immediate Children)**, **Effort-based (Planned Completed vs Total Effort for All Children)**, **Duration-based (Actual vs Planned Duration Immediate Children)**, **Duration-based (Actual vs Planned Duration for All Children)**, **Effort-based (Planned Completed vs Total Planned Duration for Immediate Children)**, **Effort-based (Planned Completed vs Total Duration for All Children)**, **Count-based (Completed vs Total Count for Immediate Children)**, and **Count-based (Completed vs Total Count for All Children)**.

Physical % Completion

Physical % Completion

Determines how the percentage completion is calculated.

It can be entered manually, or imported from MS Excel.

PL (hours)

PL (hours)

The 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.

PL/CP (Percent)

PL/CP (Percent)

The planned utilization as a percent.

Plan

Plan

The units or funds expected to be expended in association with project work.

Plan Effort (hours) (Project)

Plan Effort (hours) (Project)

The number of hours required to complete a project.

Plan Effort Type

Plan Effort Type

Determines how the plan effort for an activity is calculated.

The options include: **Duration & Resource % Availability**, **Effort at Activity Level - Equal % Distribution**, **Effort at Activity Level - Unequal % Distribution**, **Effort at Resource Level (Summary)**, or **Effort at Resource Level (Detailed)**.

Planned Completion Date (Activity)

Planned Completion Date (Activity)

The date you expect work on the activity to finish.

Planned Project Close Date

Planned Project Close Date

The date on which the project is expected to close.

Planned Project Start Date

Planned Project Start Date

The date on which work on the project is expected to start.

Planned Realization Period

Planned Realization Period

The expected date on which the benefits of the project will be realized.

Primary Contact First Name and Last Name

Primary Contact First Name and Last Name

The primary resource for the idea. This resource has the permissions to promote an idea to a proposal.

Primary Metric Name

Primary Metric Name

The name of the primary metric used to measure the performance as well as progress of your project against set baselines.

Primary Metric Type

Primary Metric Type

The type of primary metric used to measure the performance as well as progress of your project.

Priority

Priority

The priority associated with a project activity.

The values are set by your administrator.

Process Area

Process Area

The process area associated with your project.

Process areas are used to classify projects. The options you see are set by your administrator.

Process Defect (This display name is configurable.)

Process Defect (This display name is configurable.)

The process defect that the idea will address.

The display name is configurable and has no set definition. Your administrator sets the name during installation, and can map this to a proposal statement field which is then carried over to projects.

Process Defect Description (Idea)

Process Defect Description (Idea)

The description of the process defect that the Idea will address.

The display name is configurable and has no set definition. Your administrator sets the name during installation, and can map this to a proposal statement field which is then carried over to projects.

Project Currency

Project Currency

The currency used by the project.

The project currency can differ from the system currency.

Project Source

Project Source

The project source associated with your project.

Project sources are used to classify projects. The options you see are set by administrator.

Project Status

Project Status

The status of your project.

The project status options are: **Active**, **On Hold**, or **Canceled**.

Project Team Size

Project Team Size

The number of resources assigned to your project.

Project Totals

Project Totals

The financial totals for the project as a whole (not time-limited).

Project Type Description

Project Type Description

The type of project.

Project types are a way of classifying projects for reporting purposes. A project type can be associated with one or more roadmaps.

Project Validate Date

Project Validate Date

The date on which the project was validated.

Proposal Status

Proposal Status

The status of a proposal.

The following statuses are assigned to proposals: **New**, **Team Assigned**, and **Approved**.

R

RACI

RACI

The resource assignment types associated with a project.

There are four different types of resource types (RACI) that you can assign in a project:

Accountable (A): The resource who is ultimately responsible for a project. A function can have only one accountable person.

Responsible (R): The resource working on an activity and responsible for the action and execution of the plan.

Consult (C): Resources who must be consulted prior to a final decision or action. This involves a two-way communication.

Inform (I): Resources that need to be informed of the decision or action. This is usually a one-way communication.

Rate Currency

Rate Currency

The default currency used in EnterpriseTrack.

Resource Computation Enabled

Resource Computation Enabled

Determines how resource computation is calculated.

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.

Resource Computation Mechanism

Resource Computation Mechanism

The type of resource computation mechanism used.

You can choose to convert currency values or non-currency values.

Resource Status

Resource Status

The status of a resource.

The options you see are set by your administrator.

Risk

Risk

The risk level associated with this project.

Projects can have a risk level of **Low**, **Medium**, or **High**. You can use risk level to determine which projects should be of priority.

Roadmap Description

Roadmap Description

The type of Roadmap used for your project. The available roadmaps are configured by your administrator.

ROI

ROI

The ratio of money gained or lost on an investment relative to the amount of money invested. Formula for ROI: $(\text{Savings ROI} - \text{Cost ROI}) / \text{Cost ROI} * 100$

Role

Role

The role that a resource plays on a project.

RQ (hours)

RQ (hours)

The 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.

RQ/CP (Percent)

RQ/CP (Percent)

The requested effort as a percent of capacity.

S

Scheduling Mode

Scheduling Mode

The scheduling mode that is used in your project.

Manual: EnterpriseTrack does not update the dates on the project roadmap when dependent activities are rescheduled or modified. When dependent activities are rescheduled, you have to manually update the activity dates on the Project Roadmap page.

Semi-Automatic: EnterpriseTrack updates the dates when dependent activities are rescheduled. When dependent activities are rescheduled, you can click the Schedule button on the Project Roadmap page for EnterpriseTrack to update the activity dates.

Signoff Status (Proposals)

Signoff Status (Proposals)

The status of a proposal signoff. The options are: **Signoff Granted**, **Signoff Denied**, or **Conditional Signoff Granted**.

Signoff Type (Proposals)

Signoff Type (Proposals)

The type of signoff required to approve a proposal.

You can select **Signoff Required**, **Signoff Optional**, or **Signoff Not Required**.

Slack (days)

Slack (days)

The minimum number of days a task can be delayed without impacting the start date of a subsequent task.

Soft Dollar

Soft Dollar

The soft dollar category defined in the default finance template.

The name of this category is configurable and is dependent on the finance template you selected. If your project uses a single view finance template, then this category is prefixed with the word Budget.

Start Date

Start Date

The date on which your project started.

Status (Activity)

Status (Activity)

The status of your project activity.

Project activities can have the status of **Open**, **Not Applicable**, or **Completed**.

Status (Allocation)

Status (Allocation)

The status of a resource allocation.

Following are the allocation statuses: **Pending Approval**, **Review In-Progress**, **Approve**, and **Reject**.

System for Measuring Defect (Idea)

System for Measuring Defect (Idea)

The system used to measure the implementation of the idea.

The display name is configurable and has no set definition. Your administrator sets the name during installation, and can map this to a proposal statement field which is then carried over to projects.

T**TD (hours)**

TD (hours)

The total demand.

It is the sum of Requested Effort (RQ) for a role or resource and the Committed Effort (CM).

TD/CP (Percent)

TD/CP (Percent)

The total demand as a percent of capacity.

Total

Total

The total of all five categories (Benefits, Cost, Soft Dollar, Group4, and Group 5) defined in the default finance template.

The category names are configurable and dependent on the finance template you selected. If your project uses a single view finance template, then this category is prefixed with the word Budget.

Total Effort

Total Effort

The total effort required by a resource on a project.

Type

Type

The type of project activity (Phase, Task, Deliverable, Tollgate, etc.).

The values you can select are based on your project roadmap.

U

Unlocked Locally (Globally Lock Overridden)

Unlocked Locally (Globally Lock Overridden)

Determines whether to unlock project finances if finances are locked by a temporary global lock. Administrators can override and unlock project finances if they need to be edited.

Use Global Lock Month

Use Global Lock Month

Determines whether the global finance lock should be used.

If set to **No**, then the project level finance lock month is used.

V

Variances

Variances

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.

View Type

View Type

The type of view used when viewing finances.

If you select Double View, two finance tables or views are displayed per project: one view for Plan and one for Actual. In Single View, only one finance table or view is displayed per project.

Copyright

Oracle Instantis EnterpriseTrack Data Dictionary

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