ORACLE
INSTANTIS
EnterpriseTrack

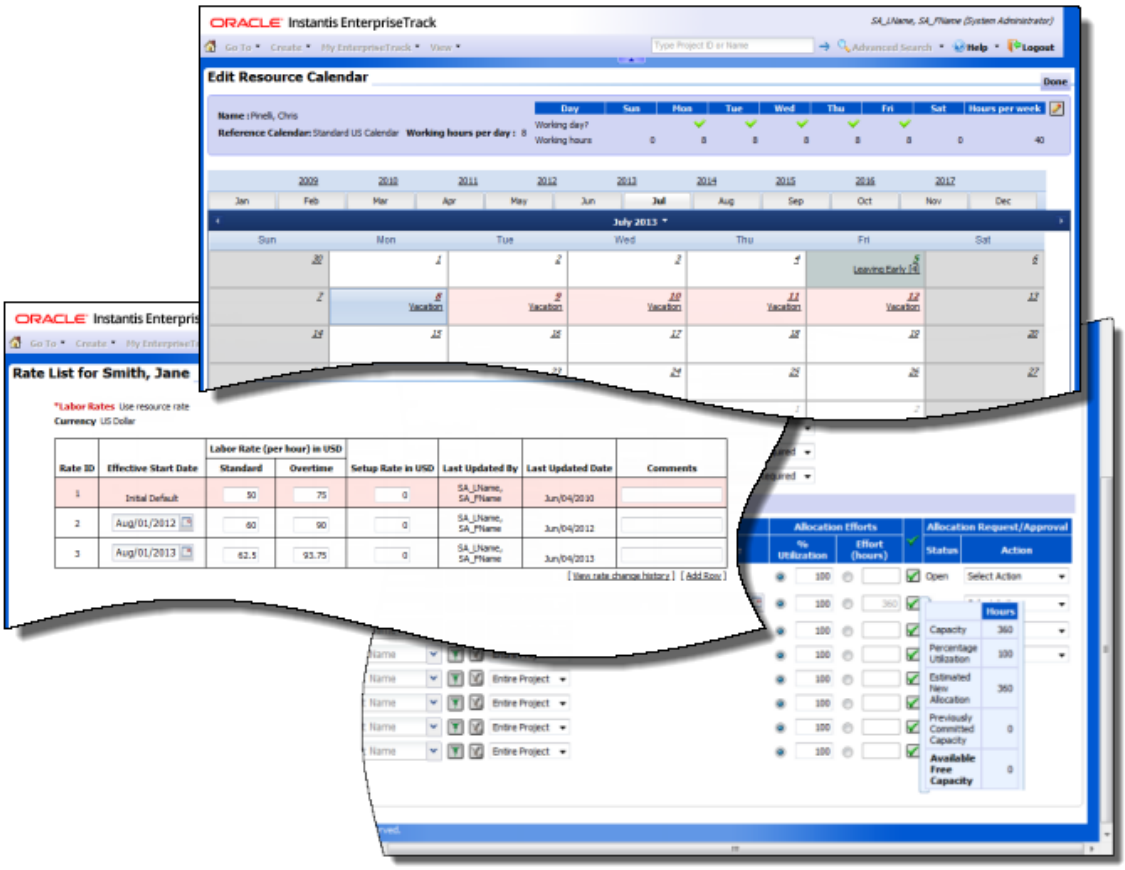
What's New
Release 8.5

June 2013

Contents

Instantis EnterpriseTrack What's New 5
Resource Management 6
Resource Calendars 6
Labor Expense Types for Activity Labor Cost Capitalization 8
Variable Resource Rates 9
Enter Resource Allocation Hours in Bulk 10
Project Request and Project Create 11
Project Request Improvements 11
Quick Project Create with Custom Fields 13
Help Configurability Enhancements 14
Reporting Improvements 15
New Program Filters 15
Improved Listing Pages 16
Additional Reporting Improvements 18
Usability and Performance Improvements 19
Performance Improvements 19
User Experience Improvements 20
UPK Enablement 22
Other Improvements 23
Timesheet Improvements 23
Field Change History 24
Finance Lock 26
Changes and Deprecations 28
Simplified Idea Portal Landing Page 28
Support and Deprecation Updates 28

Instantis EnterpriseTrack What's New



Key enhancements in Instantis EnterpriseTrack release 8.5 include:

- Resource calendars
- Labor expense types for activity labor cost capitalization
- Variable resource rates
- Enter resource allocation hours in bulk
- Project request improvements
- Timesheet improvements
- Improved listing pages
- Field change history
- UPK enablement
- Finance lock
- Additional performance and user experience improvements

Resource Management

Resource management enhancements in Instantis EnterpriseTrack release 8.5 include:

- Resource calendars
- Labor expense types for activity labor cost capitalization
- Variable resource rates
- Enter resource allocation hours in bulk

Resource Calendars

New in Instantis EnterpriseTrack 8.5 are resource calendars, which allow exceptions to be specified for individual resources. Exceptions are used to enter variations to a resource's schedule, such as:

- Vacation time
- Long leaves of absence
- Seasonal hours (For example, a resource works 45 hours per week in fall, winter, and spring, but only 30 hours per week in summer.)
- Work on holidays or other non-work days (For example, the company normally has off on Memorial Day, but some resources need to work that day.)

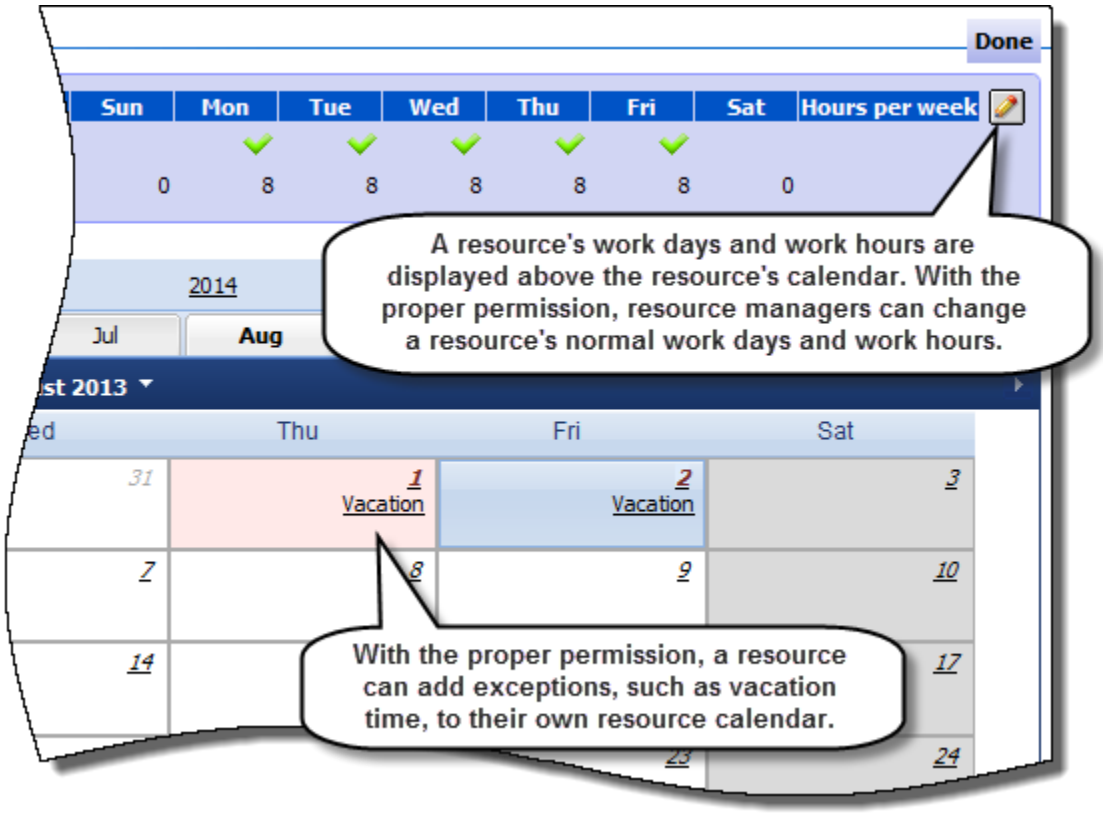
Resource calendars can affect project schedules. Exceptions entered on resource calendars are reflected in resource capacity, heat maps, and reporting, allowing project managers to have precise capacity visibility.

Each resource calendar is based on a reference calendar, as set by an administrator or project manager. When exceptions are added to the reference calendar, they are automatically applied to all derivative resource calendars.

With the proper permission, resource calendars can be modified as follows:

- *Edit My Resource Calendar* permission: Add exceptions to and remove exceptions from your own resource calendar.
- *View All Resource Calendars* permission: View a team member's resource calendar.
- *Edit All Resource Calendars* permission: Add exceptions to and remove exceptions from a resource's resource calendar. You can also change a resource's normal work hours and work days, providing support for part-time workers.

Resource calendars also provide support for one-way syncing with Microsoft Project.



Benefits:

- Enhanced, reliable project planning
- Precise capacity visibility for improved resource planning

Location:

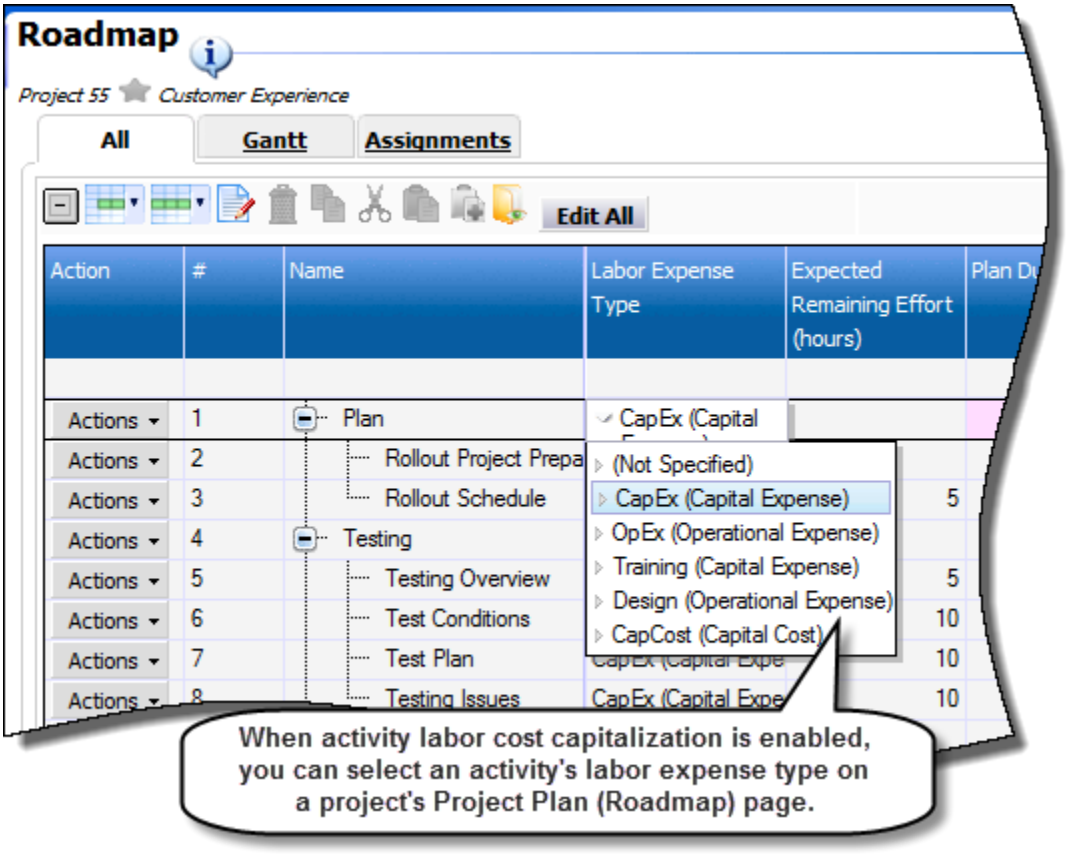
- To view your own resource calendar: On the My EnterpriseTrack menu, click *My Calendar*.
- To view a team member's resource calendar: On a Project menu, click *Go To*, *Resources*, *Listing*. Select a resource, and then, on the Actions menu, click *Select*. The Details page is displayed. Click the Calendar tab.

Labor Expense Types for Activity Labor Cost Capitalization

Project managers can use the *Labor Expense Type* column in Instantis EnterpriseTrack 8.5 to specify whether WBS activities are operational or capital expenses. The selected labor expense type determines the finance category (capital or operational) to which an activity's labor cost roll up.

Multiple labor expense types can be created based on project needs. A default labor expense type can be selected in the Activity Template. Settings at the project level allow administrators to:

- Enable or disable activity labor cost capitalization.
- Indicate if project managers are required to select a labor expense type for each activity.
- Set a default labor expense type for the project.



Benefits:

- Ensure proper cost accounting compliance.
- Financial governance processes can be easily and accurately followed by project teams.

Location:

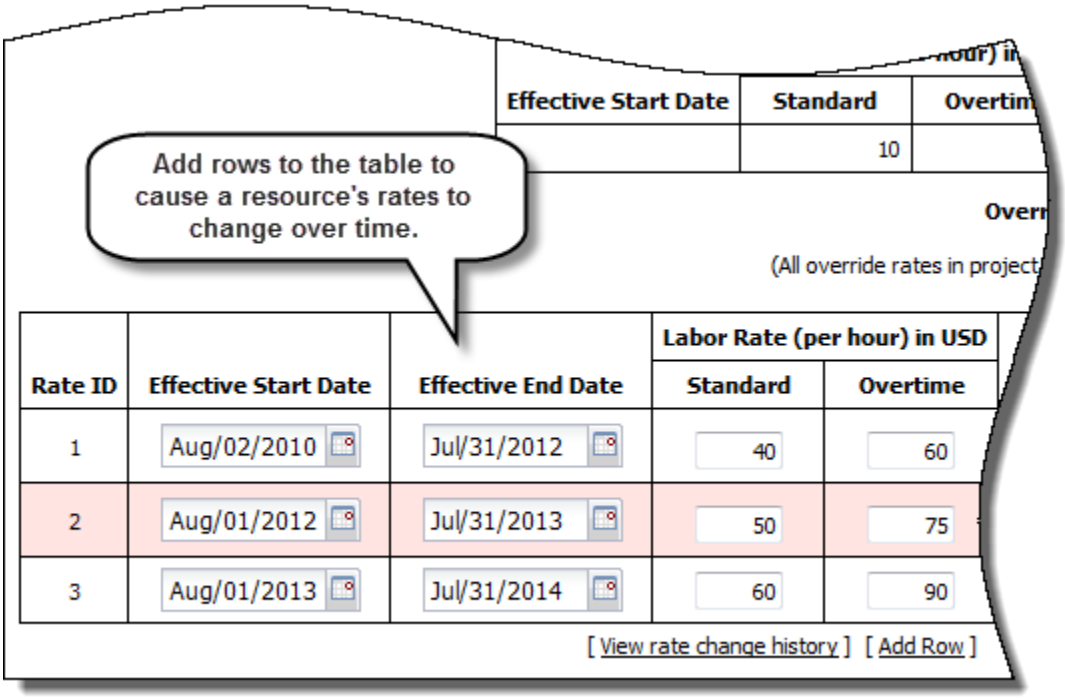
- On the Project Plan (Roadmap) page, select a labor expense type by clicking a cell in the *Labor Expense Type* column.
- For project-level labor expense type settings, on the project menu, click *Go To*, *Settings,* and scroll down to the Activity Labor Cost Capitalization section.

Variable Resource Rates

Instantis EnterpriseTrack 8.5 introduces variable rates that are specific to individual resources. Each resource's labor rates can be set to change over time -- for example, a resource's rate is $42 per hour through August 31 but changes to $43.50 per hour on September 1. Changing a resource's rate affects all projects to which that resource is assigned.

Instantis EnterpriseTrack 8.5 also introduces variable role rates. Like resource rates, role rates can be set to change over time. For example, the rate for a QA Tester is $70 per hour in the current fiscal year but increases to $72 in the next fiscal year. Changing a role's rate affects the standard role rate for all resources who have that role.

When staffing projects, project managers have the option of selecting the role rate, or the rate specific to the individual resource. Starting with EnterpriseTrack 8.5, project managers can also override resource or role rates at the project level.



Benefits:

- Better project cost estimation and tracking
- More flexible costing methods and easy cost administration

Location:

- Each resource's rates can be seen on the resource's rate list table.
- To locate a resource's rate list table: From a Project Resources page, click *Edit* on the resource's Actions menu.

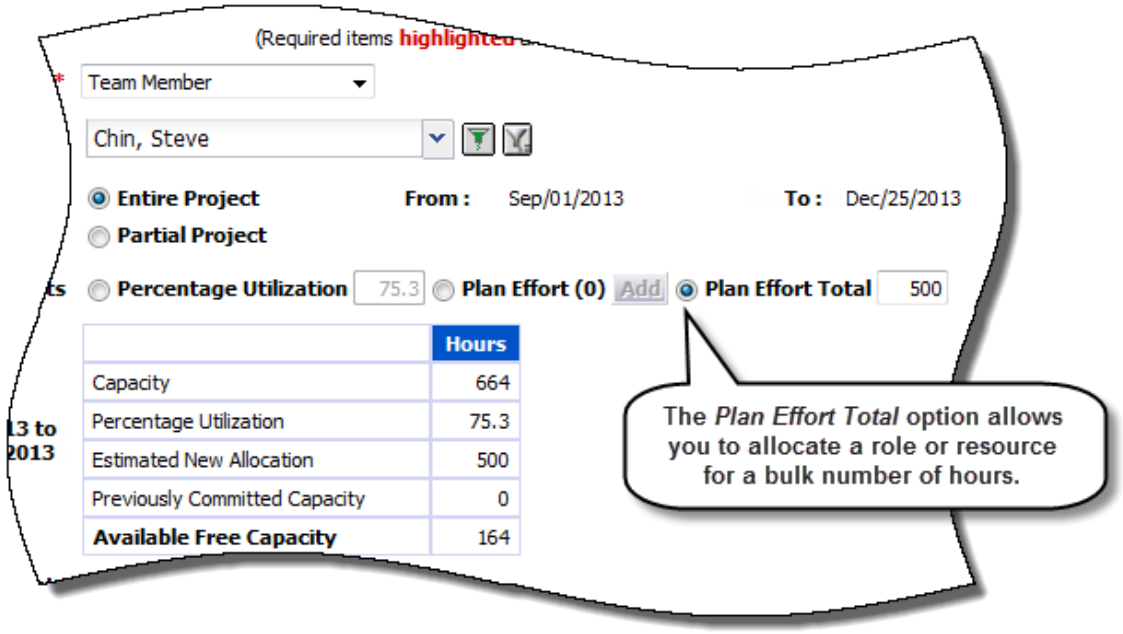
- To locate a resource's rate list table: From the Resource Listing page, click *Edit*, *Rates* on the resource's Actions menu.

Enter Resource Allocation Hours in Bulk

Instantis EnterpriseTrack 8.5 adds a plan effort total option for resource allocation. When assigning a role or resource to a project or project request, select *Plan Effort Total* if you want to assign the role or resource for a bulk number of hours.

For example, while staffing an Application Development project, you can now assign (a resource) Dan Jenkins, a software engineer, to contribute 150 hours over the course of the entire project, or within the confines of specific dates.

Previously, you could only assign roles or resources using percentage utilization (Dan needs to spend 25% of his time on the Application Development project.), or plan effort (Dan needs to work on the Application Development project for 15 hours per week for the first seven weeks, for 25 hours during week eight, and for 20 hours during week nine.)



Benefit:

Faster, more flexible resource assignment

Location:

Specify the number of hours you want the resource or role to contribute in the *Plan Effort Total* field on the Add Team Member page.

Project Request and Project Create

Project request and project create enhancements in Instantis EnterpriseTrack release 8.5 include:

- Project request process improvements
- Quick project create with custom fields
- Help configurability enhancements

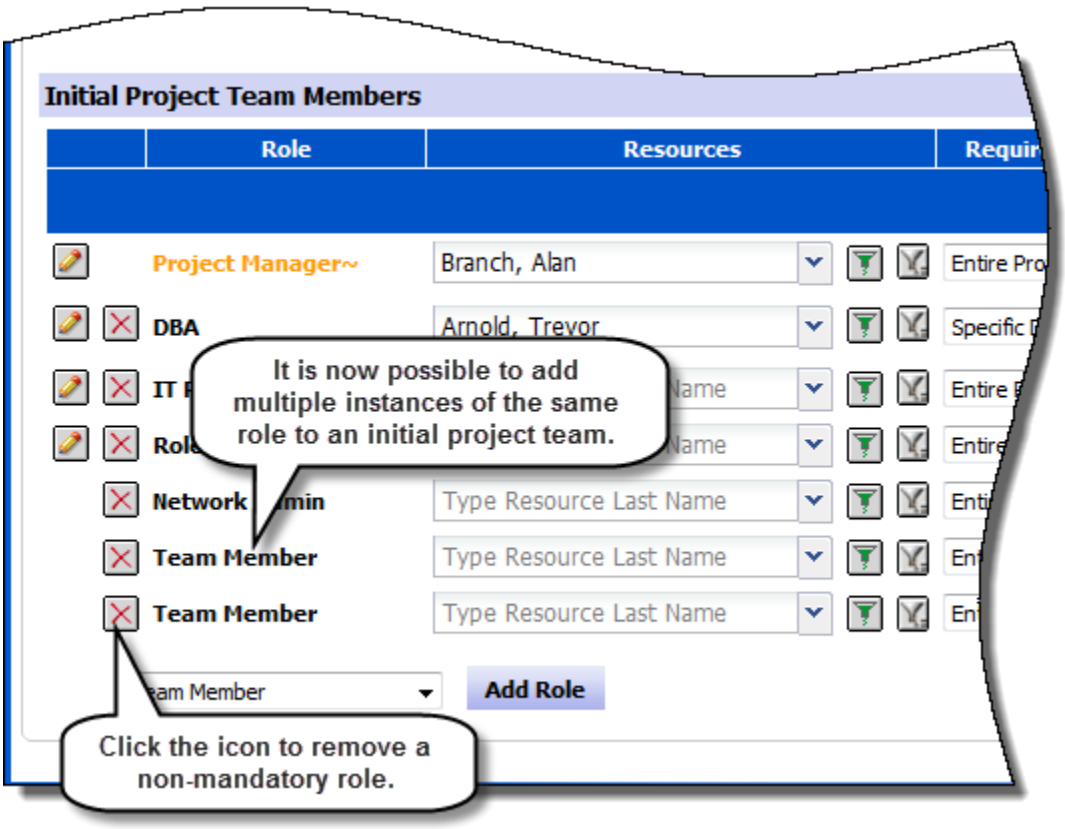
Project Request Improvements

Instantis EnterpriseTrack 8.5 makes multiple improvements to the project request process. Project managers can now:

- Add roles by clicking *Add Role*.
- Add the same role multiple times.
- Remove non-mandatory roles.
- Quickly check resource availability.

Other enhancements:

- Fields used during finance plan creation have been simplified to reflect first-level finance categories. This applies to finance fields in all areas of EnterpriseTrack (project requests, projects, what-if, reports, etc.).
- When a resource request is submitted for a project request, the resource manager, while approving the request, can specify the labor rate type (resource rate or role rate).



Benefits:

- Improve productivity by creating the right project staffing plans, project approvals, and performing resource capacity analysis.
- Perform improved financial analysis.

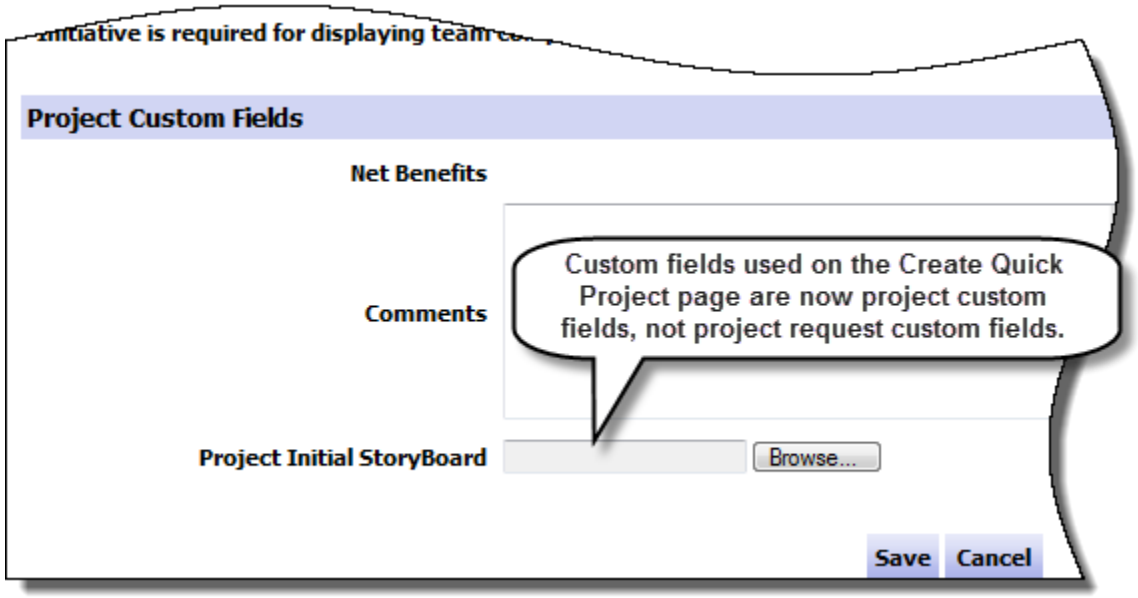
Location:

Navigate to the Create New Charter/Proposal page. On the Create menu, click *Proposal*, and then scroll down to the Initial Project Team Members section.

Quick Project Create with Custom Fields

In Instantis EnterpriseTrack 8.5, the quick project creation process prompts users to enter project custom fields (changed from project request custom fields in 8.0).

Additionally, custom fields carry over from project request to project, as was the case in Instantis EnterpriseTrack 8.0.



Benefits:

Improved project creation

Location:

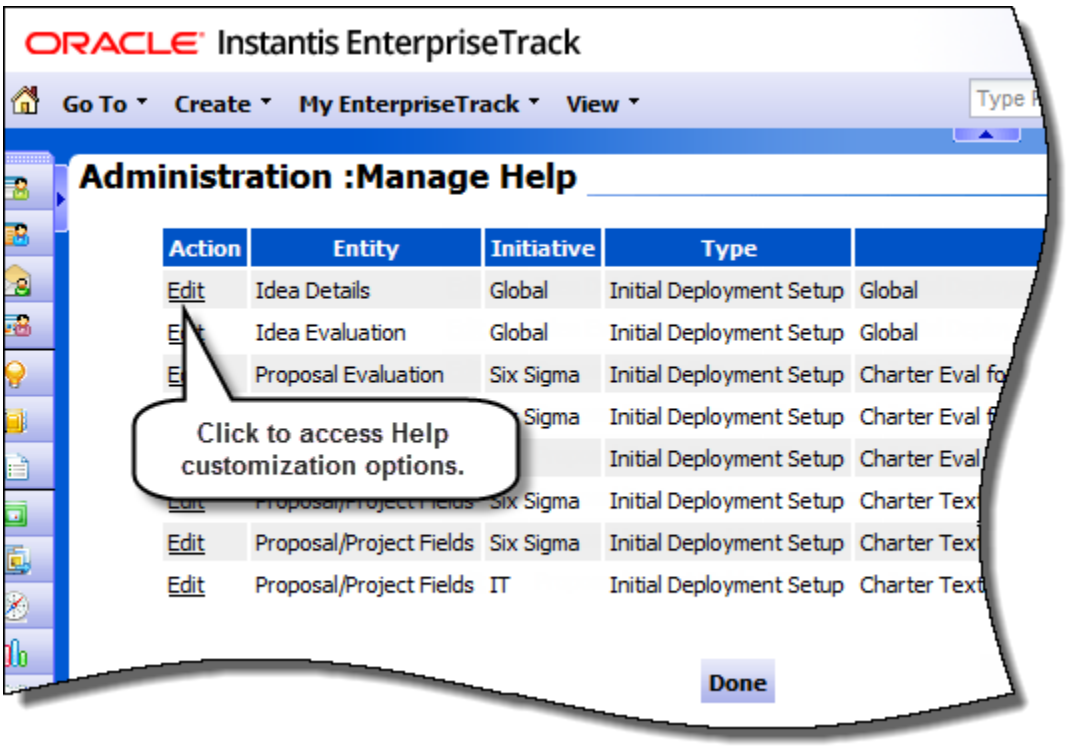
On the Create menu, click *Project*, and scroll to the Project Custom Fields section.

Help Configurability Enhancements

Instantis EnterpriseTrack 8.5 introduces the ability to configure Help content accessed in:

- Idea Details and Idea Evaluation
- Proposal Evaluation (at initiative level)
- Proposal/Project Fields (at initiative level)

Administrators can keep Help content as-is or customize it by attaching a Help document (Word, Excel, HTML, PDF, etc.) or by pointing to a URL (internet, intranet, SharePoint, wiki, etc.).



Benefit:

Maintenance cost savings

Location:

Click *Administration*. In the Settings section, click *Manage Help*.

Reporting Improvements

Reporting improvements in Instantis EnterpriseTrack release 8.5 include:

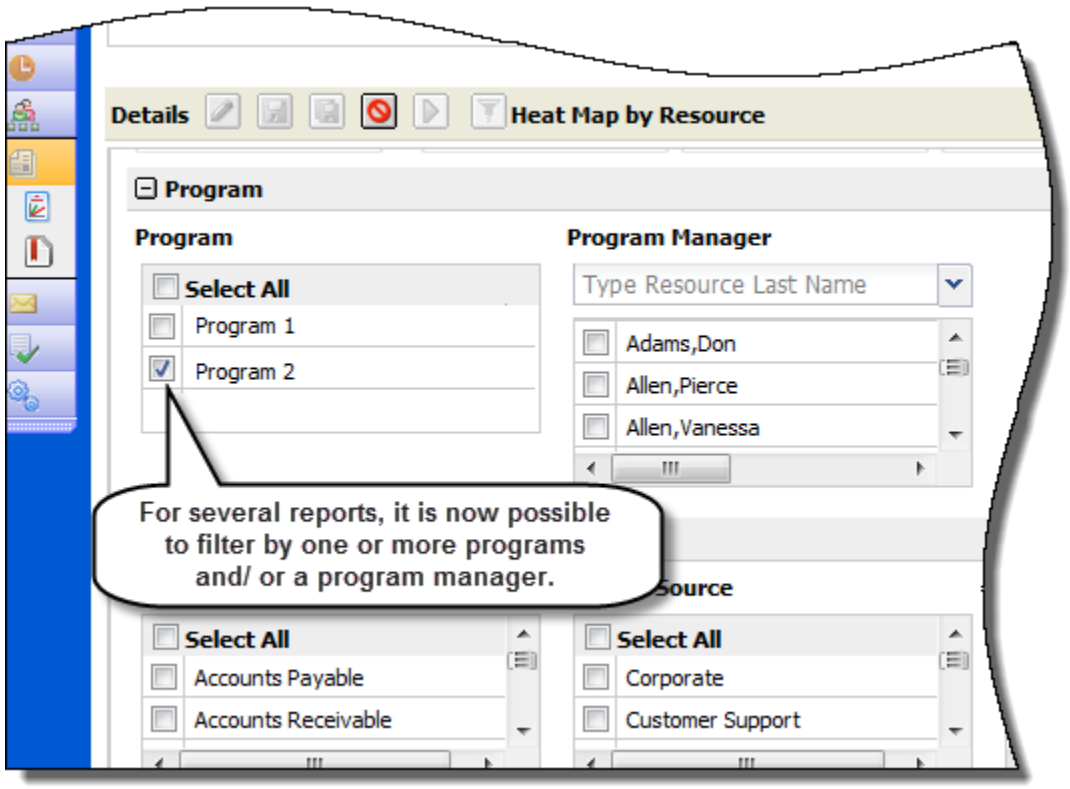
- New program filters
- Improved listing pages
- New *Heat Map by Resource CSV* report
- Support for Microsoft Excel 2010

New Program Filters

Starting with Instantis EnterpriseTrack 8.5, you can filter by a program manager or one or more programs when viewing the following:

- Project Listing page
- Project Bubble chart (filter plus a dimension in X or Y axis)
- All heat map reports
- Activity Detail report (Excel)
- Timesheet Detail report (Excel)

In order to use program filters, programs must first be created and have projects linked to them in EnterpriseTrack's Program module.



Benefit:

Improved program management analysis

Location:

On the Manage Reports page, click the Run with Filters icon next to a report that supports program filters. Program filters are displayed on the Filters tab in the Details pane.

Improved Listing Pages

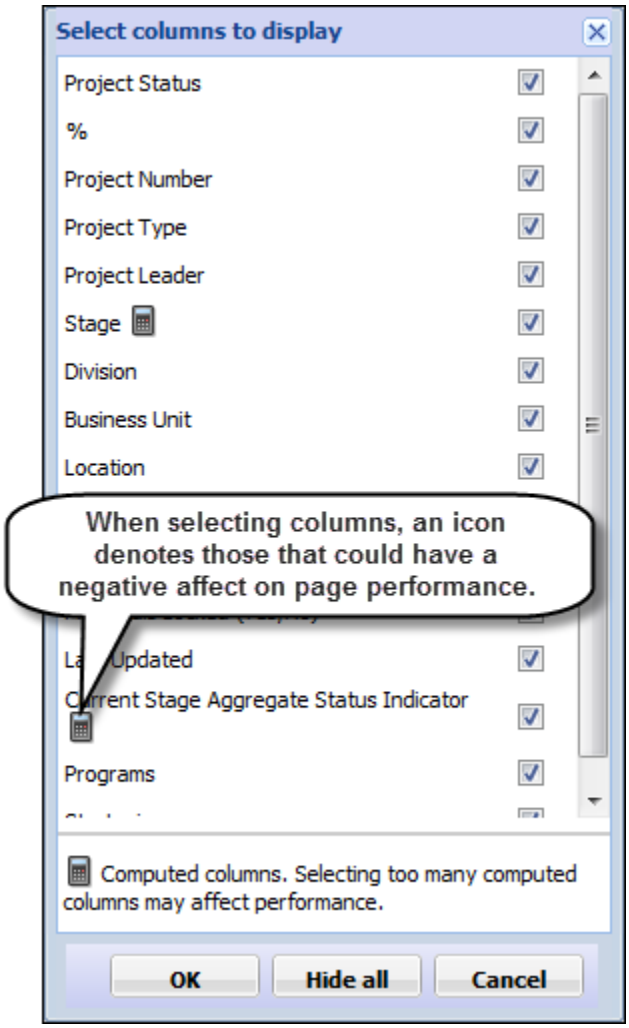
Instantis EnterpriseTrack 8.5 introduces several changes to listing pages that improve searching and page performance.

Searching

- Column selection and arrangement are saved when searches are saved (including group by and pivot).
- Idea listing pages now feature saved searches.

Performance

- Pages have been optimized for quicker load times.
- Pages return warning messages when search results exceed the cache limit.
- Columns that could degrade performance are indicated with an icon.



Benefits:

- Better system response time and admin/user control
- Improved user experience

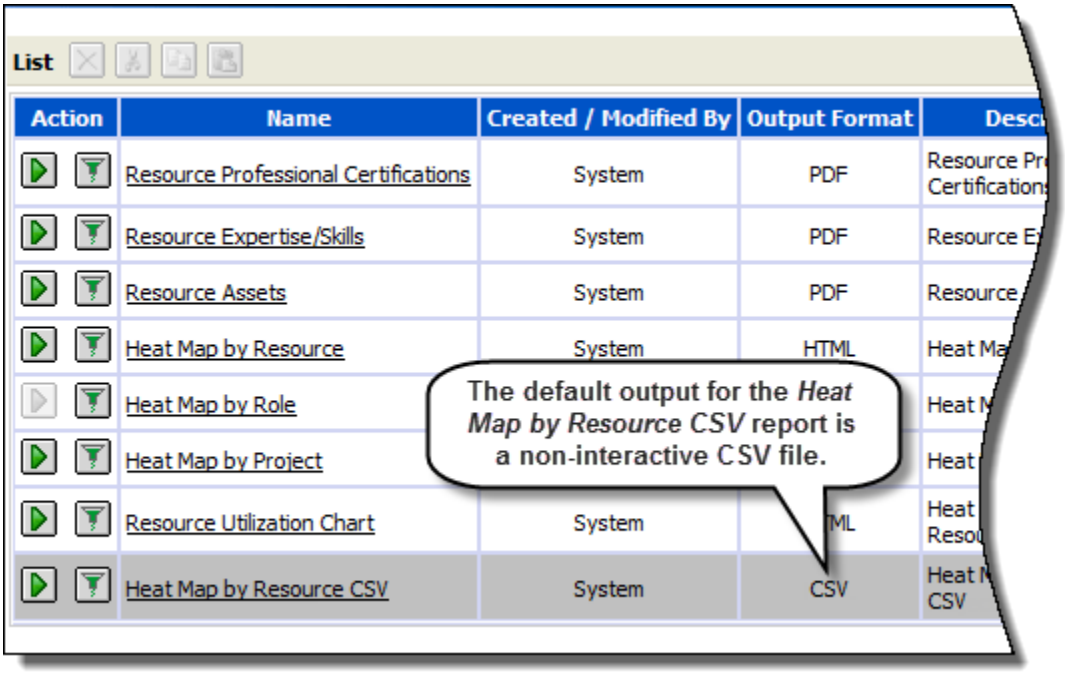
Location:

- To save column selection and arrangement with a saved search, configure columns and then on the Advanced Search page, save the search and its criteria.
- To see the icon indicating which columns could have a negative effect on system performance, click the Select Columns icon.

Additional Reporting Improvements

Instantis EnterpriseTrack 8.5 introduces a *Heat Map by Resource CSV* report, which allows for output as a non-interactive CSV (comma-separated value) file.

Additionally, Microsoft Excel 2010 is now supported, allowing for improved data compression when running large user-defined reports.



Benefits:

- Additional report output option
- Better support for large data volume when running user-defined reports.

Location:

On the Go To menu, click *Reports*. The *Heat Map by Resource CSV* report is located in the *Detail Reports* folder under *Resource Reports*.

Usability and Performance Improvements

Usability and performance improvements in Instantis EnterpriseTrack release 8.5 include:

- More compact heat maps
- Improved resource planning page
- Improved application cache
- Quicker navigation to project issues, risks, defects, backlogs, and scope change requests
- More uniform interface
- Oracle User Productivity Kit enablement

Performance Improvements

Instantis EnterpriseTrack 8.5 introduces a number of changes to enhance performance:

- **More compact heat maps:** User can hide rows containing zero values, thereby improving performance when running reports against longer projects.
- **Resource Planning page changes:** The Resource Planning page now features a new monthly mode. Also, computations are made in-server for better performance.
- **Improved application cache:** EnterpriseTrack's application cache architecture has been improved for better performance.

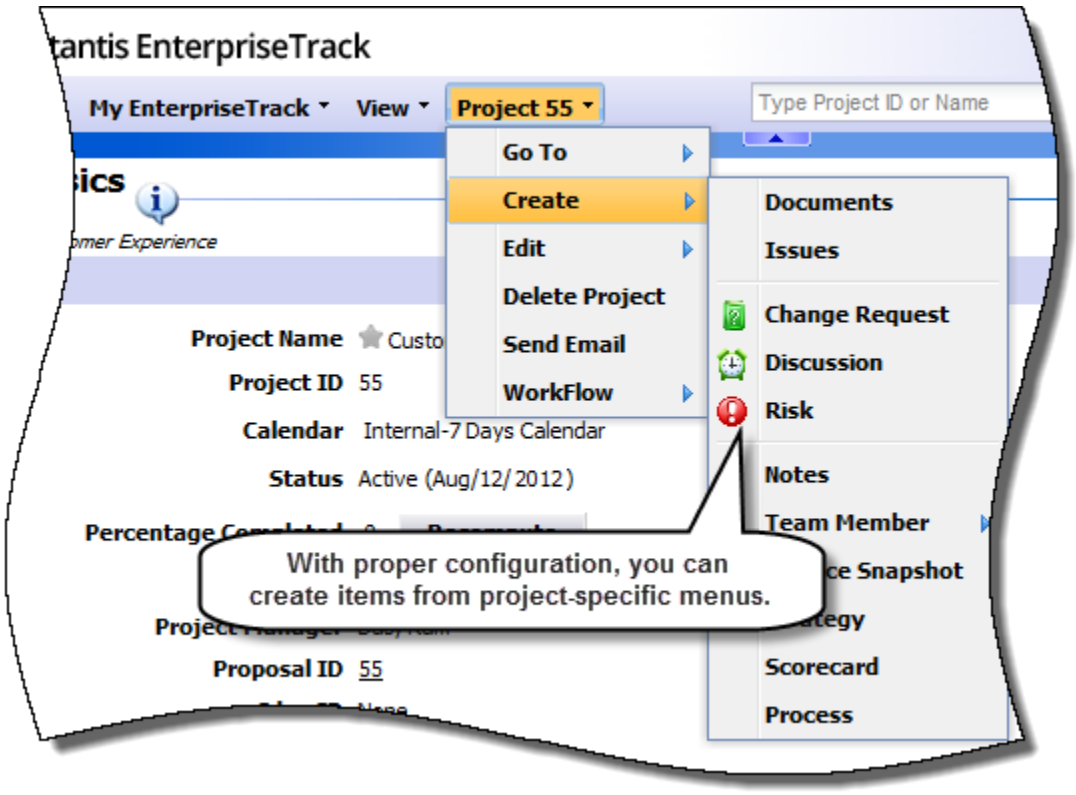
Benefits:

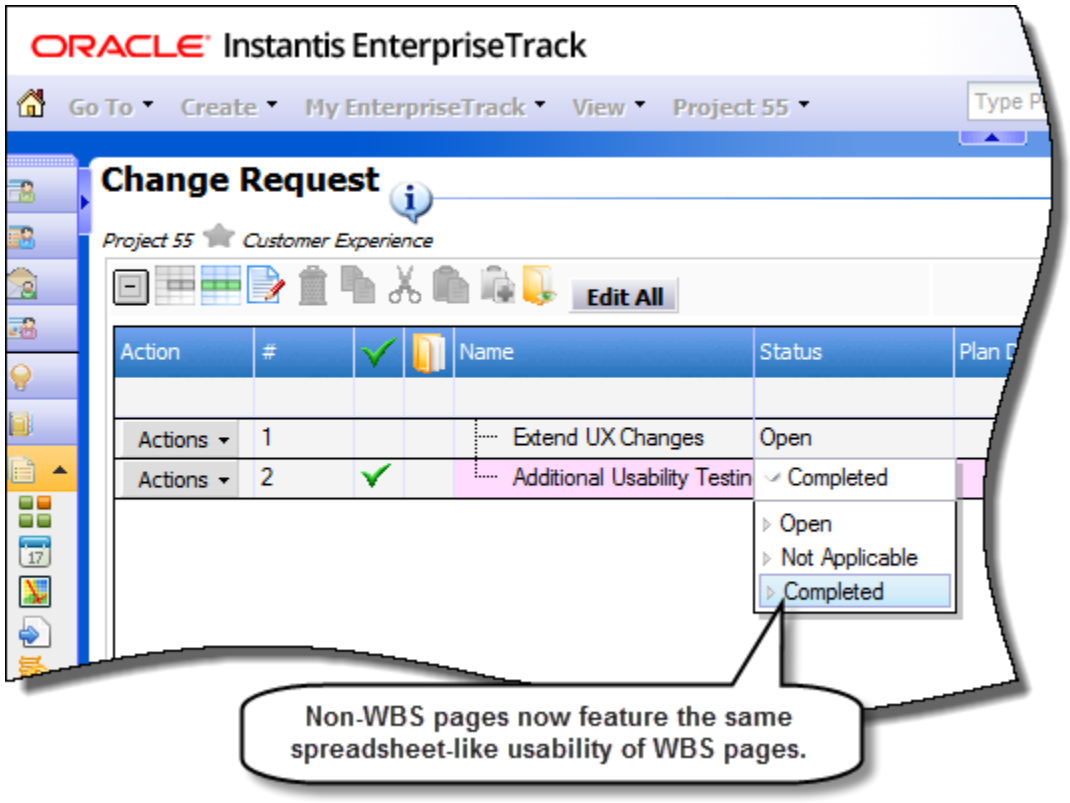
- Better system response time
- Improved user experience

User Experience Improvements

Starting with Instantis EnterpriseTrack 8.5, users can easily navigate to issues, risks, defects, backlogs, and scope change requests from project-specific menus.

Additionally, non-WBS pages now have the same spreadsheet-like interface as WBS pages.





Benefit:

Improved user experience

Location:

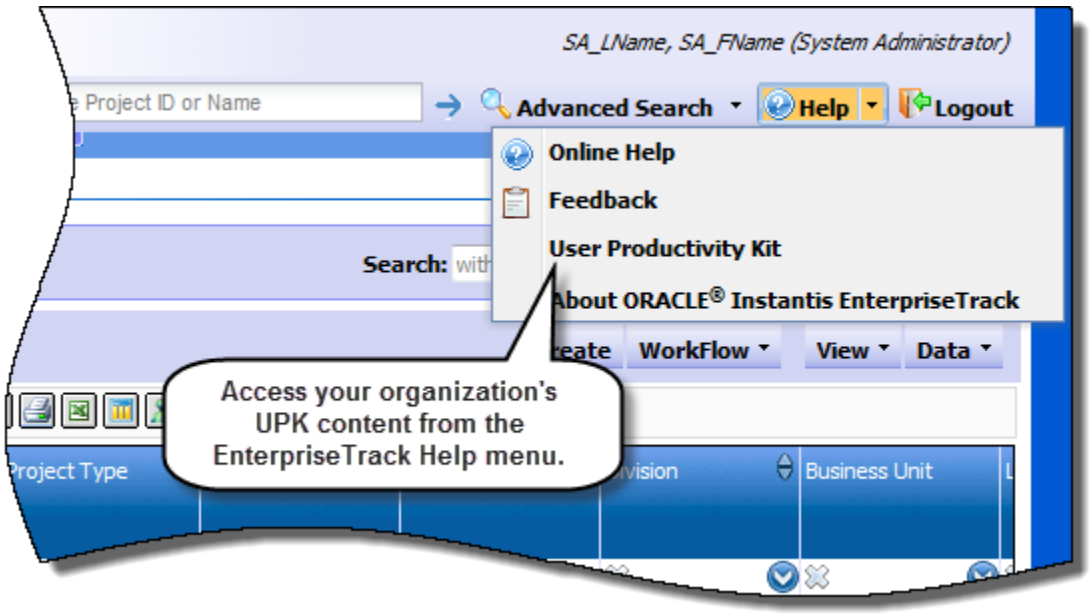
On a Project menu, click *Create*, and then select an option.

UPK Enablement

Starting with release 8.5, Instantis EnterpriseTrack is enabled for Oracle User Productivity Kit (UPK), an Oracle application that enables users to develop, customize, and publish documentation and e-learning content.

Instantis EnterpriseTrack's UPK enablement allows users to access EnterpriseTrack-specific UPK content from the Help menu. It also allows organizations to purchase pre-built UPK content developed specifically for EnterpriseTrack and/or develop their own content.

UPK is a separately licensed product which may have to be installed on-premise (including SaaS customers).



Benefits:

- Increased user competency
- Reduced user training and support costs

Location:

- On the Help menu, click *User Productivity Kit* to access your organization's UPK content.
- Click *Administration*, *Manage User Productivity Kit* to view or edit the location of your organization's UPK content.

Other Improvements

Other improvements in Instantis EnterpriseTrack release 8.5 include:

- Timesheet improvements
- Field change history
- Finance lock

Timesheet Improvements

Instantis EnterpriseTrack 8.5 timesheets optionally support Estimated Time to Completion (ETC) and Expected Remaining Effort (ERE).

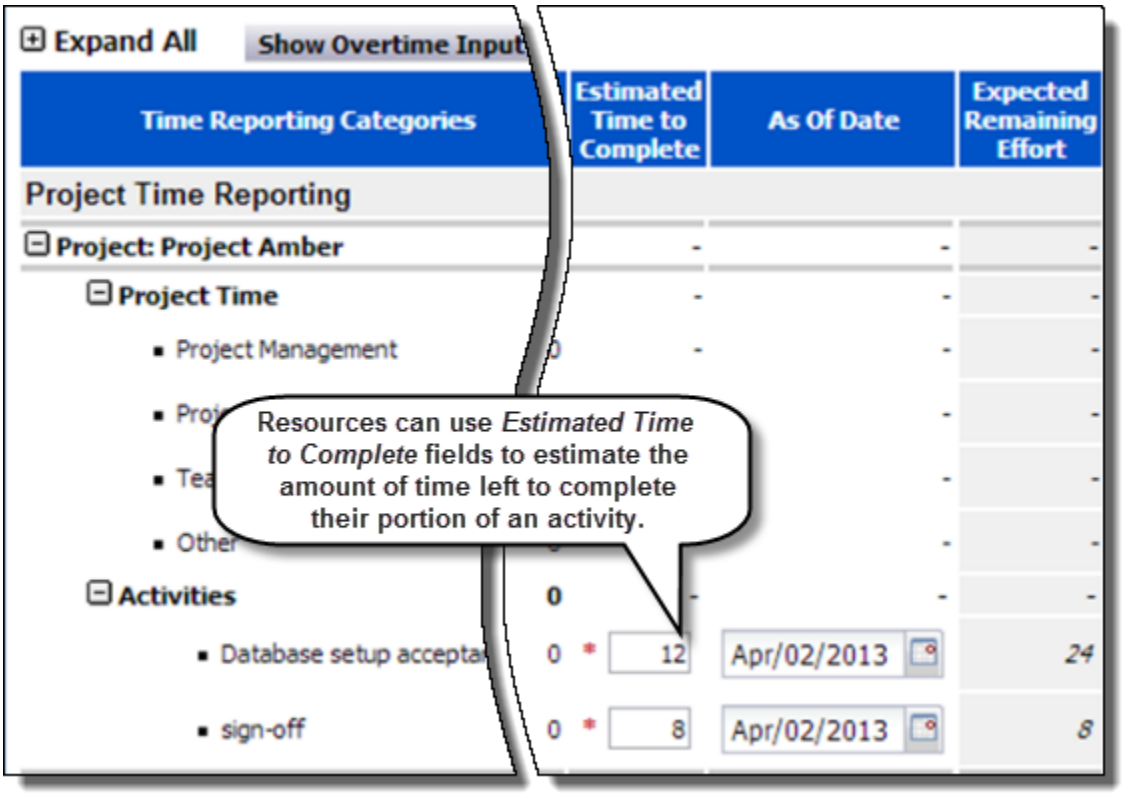
- **ETC:** Prediction of time needed to complete a resource's portion of an activity, entered by the resource
- **ERE:** Calculated by EnterpriseTrack as plan effort minus actual effort

The addition of ETC allows resources to provide higher quality activity status updates. ETC entered on timesheets rolls up to activity level upon timesheet approval.

A warning indicator appears when ETC is not the same as ERE, allowing project managers to reconcile discrepancies between the two. Additionally, ETC can be enabled or disabled for specific projects.

In addition to the introduction of ETC, EnterpriseTrack 8.5 adds the following timesheet features:

- Project managers can change the grace period for timesheet reporting at the project level; they can specify how many days before the activity start date, and how many days past the activity completion date team members can continue to report effort in timesheets.
- Resource timesheets are more compact; only activities that are eligible for reporting are displayed in timesheets.



Benefits:

- Enhanced project execution through better understanding and reporting of time-related information
- Enhanced user productivity via a simple and more intuitive user interface

Location:

- On the Go To menu, click *Timesheets*. With the proper configuration, timesheets contain *Estimated Time to Complete* fields.
- On the Administration page, click *Manage Estimated Time to Complete for Timesheet Settings* to manage ETC settings at the initiative level.
- On a Project Settings page, click *Edit* next to Timesheets to manage ETC settings at the project level.

Field Change History

Instantis EnterpriseTrack 8.5 retains field change history :

- Who changed the value
- When the value was changed
- The old and new value
- Comments (for approvals)
- Context (description)

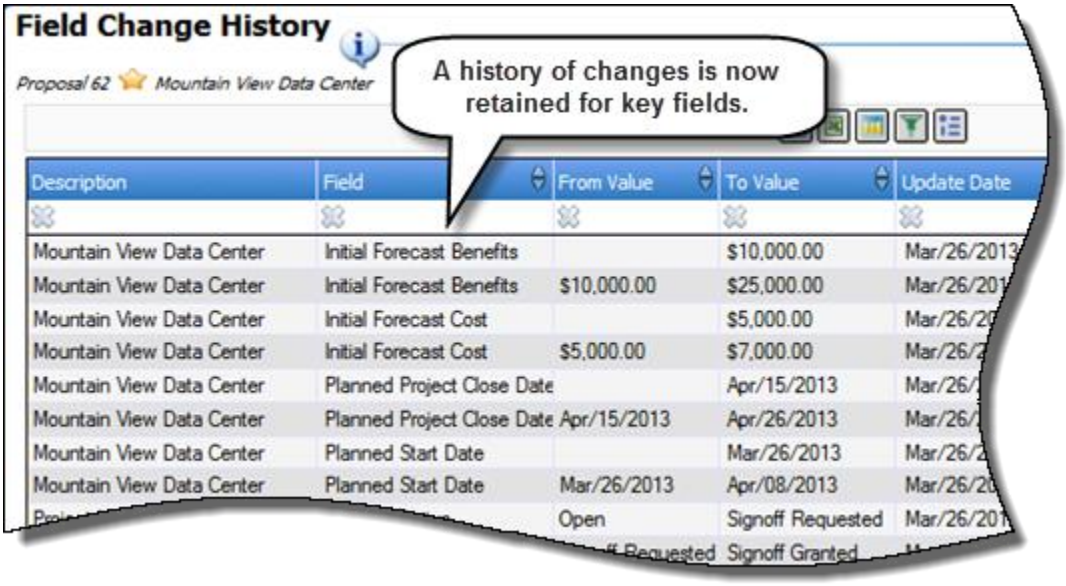
Change history is available for the following fields:

Project Requests

- Basics: Status, Roadmap
- Finance: Initial fields (varies depending on finance template configuration), Cost of Capital, Tax Rate, Cost of Asset
- Dates: Planned Start Date, Actual Start Date, Planned Project Close Date
- Approvals: Signoff Status

Projects

- Basics: Status, Roadmap
- WBS and non-WBS: Name, Status, Resources, Plan Start, Plan Completion, Actual Start, Actual Effort, Actual Completion, % Completion
- Dates: Current Start Date, Actual Start Date, Planned Project Close Date



Benefit:

Improved auditing and change visibility

Location:

On a project menu, click *Go To*, *Field Change History*, or, click *Field Change History* in the left-hand navigation.

Finance Lock

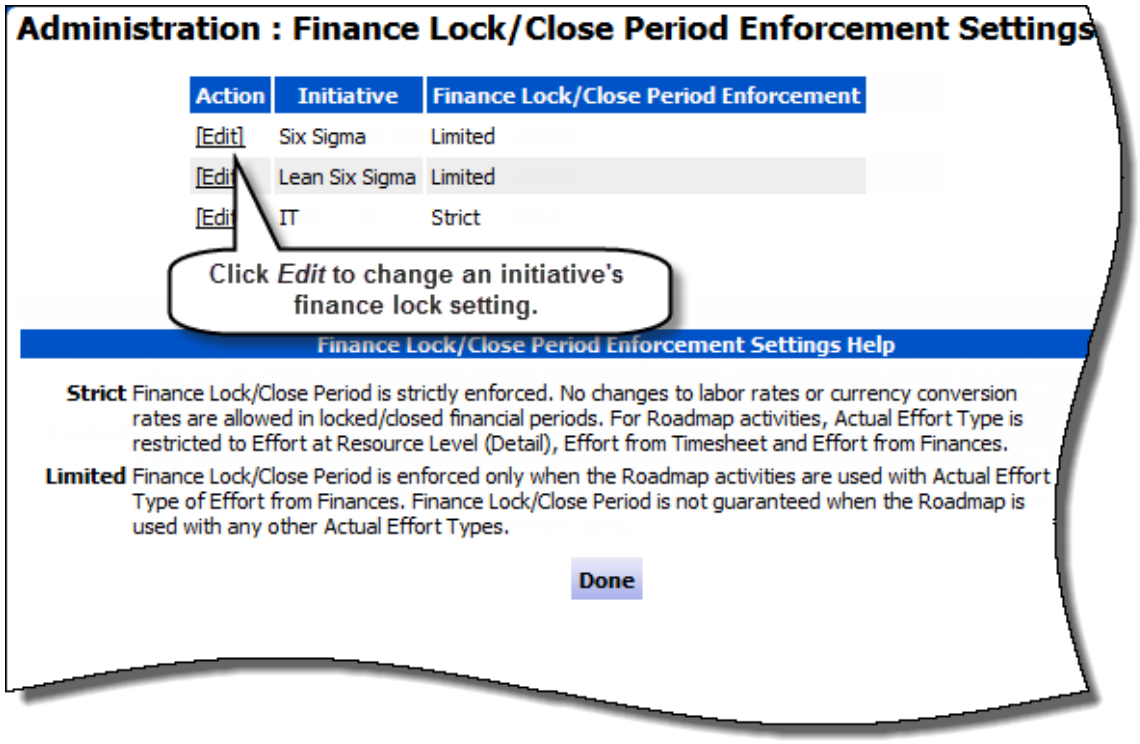
Instantis EnterpriseTrack 8.5 offers two new enforcement modes for finance lock/close periods:

- **Strict mode:** Finance lock/close period is strictly enforced. No changes to labor rates or currency conversion rates are allowed in locked/closed financial periods. For WBS activities, AET (Actual Effort Type) is restricted to Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances.
- **Limited mode:** Finance lock/close period enforcement is manual (not automatic by system). This behavior is very similar to that found in Instantis EnterpriseTrack 8.0.

The following table lists the supported options for both modes:

	Strict Mode	**Limited Mode**
Enforcement	Always guaranteed.	Guaranteed only when used with AET set to Effort from Finances, finances are edited in Monthly mode, and resource rates are explicitly overridden at the project level. Enforcement is through manual process.
Resource, Role, and Labor Rate Changes	Not allowed if it can affect a finance lock/closed period in any project.	System does not check for violation, and finance/lock close period integrity not protected.
Currency Conversion Rate (Exchange Rate) Changes	Not allowed if it can affect a finance lock/closed period in any project.	System does not check for violation, and finance/lock close period integrity not protected.
Supported AETs	Effort from Timesheets, Effort at Resource Level (Detail), and Effort from Finances.	All AETs.
Unsupported AETs	Duration & Resource % Availability, Effort at Activity Level - Equal % Distribution, Effort at Activity Level- Unequal % Distribution, and Effort at Resource Level (Summary).	None.
Editing Finances in Yearly or Aggregate (Annualized) Mode	Not allowed to protect finance lock / close period integrity.	Allowed. Finance lock / close period integrity not protected.

Changing the enforcement mode in a live, production environment is not recommended. When the mode is changed, it affects only new projects. Existing projects remain in the previous enforcement mode and cannot be changed.



Benefit:

Enforce corporate financial reporting governance.

Location:

Administrators can view or change enforcement modes. On the Go To menu, click *Administration*. In the Settings section, click *Manage Finance Lock/Close Period Enforcement Settings*. The Finance Lock/Close Period Enforcement Settings page is displayed.

Changes and Deprecations

Changes and deprecations in Instantis EnterpriseTrack release 8.5 include:

- Simplified idea portal landing page
- Several newly supported and several deprecated or no longer supported items

Simplified Idea Portal Landing Page

The Idea Portal allows individuals without EnterpriseTrack login credentials to input ideas into the application. In Instantis EnterpriseTrack 8.5, the Idea Portal has been simplified to allow only for idea submission and search. It is not possible to access projects or project requests from the portal.

Benefit:

Improved license and security enforcement. Users without proper privileges do not have a backdoor entry for viewing project details.

Location:

The Idea Portal is accessed via a separate URL supplied by your organization.

Support and Deprecation Updates

Instantis EnterpriseTrack 8.5 adds support for the following:

- Microsoft Project 2010
- Microsoft Excel 2010
- Microsoft PowerPoint 2010
- Mac OS 10.6.8
- Mozilla Firefox 19

Starting with Instantis EnterpriseTrack 8.5, Microsoft Internet Explorer 6 and older editions of Mozilla Firefox are no longer supported.

SQL Server database is deprecated but is still supported in EnterpriseTrack 8.5; it may not be supported in future releases. This applies to on-premise customers only.

EnterpriseTrack's Vista skin is also deprecated; users are encouraged to use the default EnterpriseTrack skin.

For a complete list of compatibilities, please refer to the configuration information document for Instantis EnterpriseTrack 8.5 (http://docs.oracle.com/cd/E41201_01/English/Tested_Configurations/EnterpriseTrack_Tested_Configurations.xlsx).