Construction and Engineering

# Orade's Instantis EnterpriseTrack 


#### Abstract

Oracle's Instantis EnterpriseTrack is a cloud-optimized enterprise project portfolio management (PPM) software used by today's leading organizations for IT project management, new product development, business process improvement initiatives and general project management offices (PMOs) to improve strategy execution and financial performance through better work and resource management. It provides an end-to-end solution for managing, tracking, and reporting on enterprise strategies, processes, projects, programs, portfolios, resources, costs, and benefits.


## ADVANTAGES FOR KEY STAKEHOLDERS

Oracle's Instantis EnterpriseTrack provides project managers with the following advantages
Instantis EnterpriseTrack is easy.

- Easy to deploy quickly in the Oracle cloud. You can be up and running in days, not months.
- Easy to use and administer.
- Easy to afford. The total cost of ownership is much lower compared to traditional servicesintensive systems because rich functionality is available via out-of-the-box configuration settings, not customization.

Oracle's Instantis EnterpriseTrack manages beyond one initiative.

- Instantis EnterpriseTrack was designed to manage IT, new product development, process improvement, and other portfolio types in a single system. As a result, the system is uniquely suited for managing and reporting on enterprise-wide resource utilization and investments.
- The Strategy Manager module enables projects to be aligned with business priorities and strategic initiatives. With it, organizations have an easy way to add new hierarchical strategy trees such as processes, applications, and investments to align organizational initiatives and drive project execution from the top down.
- Standardization and consolidation of PPM governance processes, reporting, and enterprise-wide resource and financial management is now possible.


## Oracle's Instantis EnterpriseTrack addresses key business drivers.

- Dynamically configure listing pages to suit personal preferences, including column selection, drag-and-drop ordering, in-page filtering, group-by functionality, pivot, and export to Excel.
- Personalize dashboards easily by dragging and dropping relevant, drillable graphical components from a growing gallery of out-of-the-box resource capacity and utilization charts to put real-time resource and project information at the fingertips of executives and project stakeholders.
- Color-coded heat-map reports provide a single version of truth for resource commitments and anticipated utilization by individuals and roles.


## Key Benefits

Align strategy and business processes with project execution.

Plan and execute new product portfolio strategies centrally.

Enterprise-wide resource demand, availability and utilization visibility

Manage demand and resource utilization across product development and delivery teams globally

Increase productivity by streamlining manual tasks and leveraging consistent workflows and approval processes.

Easily share financial and performance improvement results with key business stakeholders

Automated and streamlined resource management, process execution and reporting

Monitor, report and analyze product portfolio activity, status and customer success metrics

Process maturity-appropriate tool configuration

Complete more, higher-value projects sooner.

## KEY SOLUTION CAPABILITIES

Instantis EnterpriseTrack is a modular solution for end-to-end project and portfolio lifecycle management. Collectively, Instantis EnterpriseTrack solution modules allow IT resource and portfolio managers to answer the most critical project management questions, as outlined in the table below:

| Key Question | Module or Feature |
| :--- | :--- |
| What does my demand pipeline look like right now? | Demand Manager. Proposal workflow with <br> resource request support |
| What are my highest-priority proposals and projects? | Prioritization and scoring functionality |
| Will current and future capacity be enough to meet <br> our strategic goals? | Strategy module combined with dashboard <br> and reporting features |
| What are my resources committed to now and over <br> my planning horizon? | Resource Manager. Listing pages and <br> heat-map reports |
| What impacts would shifting, excluding, or adjusting <br> effort of proposed projects have on my plan? | Capacity Manager. "What if" scenario <br> planning |
| How can I quickly find the right available resource to <br> fill this request? | Simple type-ahead and advanced search <br> filters |
| How do I account for vacation, working holidays, part- <br> time and seasonal workers, in my capacity planning <br> and project schedules? | Resource calendars |
| How do I continue to leverage Microsoft Project for <br> detailed project scheduling? <br> project or timeframe? <br> reports? | Microsoft Project plug-in for import-export of <br> MSP plans |
| How do I ensure timely communication of assignment <br> approvals and project responsibilities? | Configurable approval workflow and <br> notifications |
| How do I ensure accurate capture of plan and actual <br> effort? <br> How do I improve collaboration and best-practice <br> sharing? | effort and timesheet support <br> Rnowledge Manager. Best practice <br> repository in Knowledge Manager and <br> EnterpriseStreams |
| configurable financials |  |

## Key Features

Oracle Cloud deployment
Secure, scalable and highly configurable
Innovative user interface and personalization experience
Automated idea portal project demand capture
Integrated strategy and project portfolio management
Configurable workflow, approvals and notifications

Robust work breakdown structure (WBS), financial and timesheet information integration
Two-way Microsoft Project import/export capability
Resource calendars for finergrained capacity planning and project scheduling
"What if" scenario and capacity planning
Simple and advanced search options
Flexible dashboard and reporting solutions
Collaboration and social networking capabilities
Fully internationalized
Mobile app for iOS and Android phone and tablet access

## LIFECYCLE MODULES

Instantis EnterpriseTrack supports the following solution modules to help organizations plan and execute project work across a complete PPM lifecycle.

## Plan

- The Strategy Alignment module enables organizations to define a hierarchical portfolio of strategic goals and initiatives and drive execution from the top down.


Figure 1. Instantis EnterpriseTrack provides a modular solution approach.

## Select

- The Idea Manager module automates your project's "suggestion box" by capturing project ideas and filtering requests leveraging an optional online portal.
- The Demand Manager module streamlines and standardizes in-take capture, workflow, prioritization, resource scoping, and approval processing for simple and complex work/service requests, proposals, and business cases.


## Mobilize

- The Capacity Manager module facilitates resource optimization via "what if" scenario planning to simulate the impact of shifting, excluding, or adjusting effort of proposed project plans.


Figure 2. Meet capacity constraints and resource demands with "what if" scenario planning.

- The Resource Manager module offers resource pool visibility and allocation control
by balancing in-bound work demands with available resources such as time, people, or budget


## Execute

- The Project Manager module ensures best-practice application of chosen methodologies. It increases project visibility-including status, issues, and risks-and guides project team execution in achieving goals leveraging a flexible n-level-deep work breakdown structure.
- The Knowledge Manager module streamlines project execution and enhances work management practices by leveraging a centralized knowledgebase of project best practices, documents, tools, and templates.


Figure3. Gain instant visibility to availability by resource or role with heat map reports

## Measure

- The Financials Manager module tracks plan versus actual costs; top-down and bottom-up project budgeting; and capitalization, expense, and chargeback accounting.


Figure 4. Report on resource utilization, strategy alignment, and other key metrics.

- The Metrics Manager module tracks and rolls up nonfinancial performance indicators such as defects, service levels, trouble tickets, or any other user-defined operational metric.


## ADVANTAGES FOR KEY STAKEHOLDERS

The heart of Instantis EnterpriseTrack is its market-leading dashboard and reporting capabilities. They allow easy, secure, instant dashboard and report creation and sharing with full drill-down capability. Dashboards and reports can be configured to securely roll up and report on project resources, progress, costs, and results in and across project portfolio types, making Instantis EnterpriseTrack an ideal solution for supporting enterprise program management offices.


Figure 5. Dashboards aggregate and present key metrics in an intuitive fashion.

## COLLABORATION, SOCIAL NETWORKING AND MOBILE

EnterpriseTrack Mobile© provides state of the art access to your Instantis EnterpriseTrack information from all of your mobile devices. Approve timesheets, review dashboards and access project listing and activities coming due via this custom built app.


Figure 6. EnterpriseTrack Mobile© home screen.

Using the EnterpriseStream module user can network, view notifications, subscribe to favorite projects and comment on work completed. Notification emails can be configured by project role to suit business goals and cultural norms. There is virtually zero effort to set it up, access the tool, start collaborating, and realize immediate productivity results.

## ORACLE'S INSTANTIS ENTERPRISETRACK TECHNOLOGY AND CLOUD SERVICE

Oracle's Instantis EnterpriseTrack is a secure, 100 percent Web-based application that is deployed as part of Oracle's Cloud Service.
The system is well known for its out-of-the-box configurability with deployment timeframes can be measured in days, not months. Oracle's Instantis EnterpriseTrack Cloud Service has more than 15 years of record service levels in terms of security, performance, availability, and reliability. Instantis EnterpriseTrack enables you to complete more, higher-value projects on time and on budget with existing resources. As a result, organizations quickly accrue financial benefits and typically realize a compelling ROI in less than one year.

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## Integrated Cloud Applications \& Platform Services

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