Innotas[™]@ Emory

Quick Reference Guide

Navigation Toolbar

Home Projects Dashboards Reports Resources Project L...

Innotas is **highly configurable**. The Navigation Toolbar can be customized to fit your needs. Labels can be added to the icons via the Reorder Navigation link. The Projects link takes you to Projects Page



Projects Page

Filter the Projects
listing by clicking the
ellipses (and
selecting 'My Projects'.
This filters the list for
only projects where
you are the PM or on
the team

Pro	<mark>jects</mark> (195)		In ad	dition	to cus	tom fi	lters,	the proje	ect					
E)		list will	filter	as you	type	into tl	he text bo	ох					
s	aved Filters				•	<i>`</i> `								
Pro	Status: +Open	ivery Date H	y Date H											
#.	# Status: +Closed		Projects (6)											
#	+My Staffing Projects		Trainin		•									
#	Status: +Proposed		Project Name	Portfolio	Request	Status	Phase	PI Delivery Date	e He					
#	My Projects		#Small Engagement Tr			Proposed								
#	Main Portfolio		#Training Project - Bac	LITS: UIT	Patti Pate	Proposed		4/30/2018						
#	Maintenance		Topaz-Elements Training	LITS: UIT		Proposed			On					
#	Mission = Foundation	2019	Training Project	LITS: UIT	Patti Pate	Proposed	Concept	4/30/2018						
**	Mission = Research	2013	Training Project - Patti	LITS: UIT	Patti Pate	Proposed	Concept	4/30/2018						
*	Misson = Clinical/Service	2017 0	Training_Project	LITS: UIT	Patti Pate	Proposed		4/30/2018						
	Misson = Education	2017 0												

Project Sections

Save Cancel Actions -

1484374974

Training_Project

The **Details** page includes frequently updated data such as: Dates, Weekly & Monthly status and other critical information. Be sure to update this frequently

The Project Sections menu is used to manage different aspects of the project

	Project Manager*			Scope RYG		Ψ	Planned for Next		
	Status* Proposed		Ψ.	Resource RYG		Ψ	Month		
Sections «	Phase		T	Sponsor Attention	What outstanding decisions/ ac leadership/ sponsors?	ions are needed from	Executive Decisions/Issues		
	Schedule From Date * 12/1/2018			Executive Risk	Executive Risk Description		Status Report -		
Detaile	Planned Delivery Date 4/30/2018			Description	If project status is Yellow or Re What's the issue causing the pro	: ject (Red – Behind	Monthly		
Details	Scheduled Finish Date 7/9/2019				Plan/Yellow – At Risk) What have you done to escalate	and when?			
	Scheduled Hours				Risk" Yellow" or "Behind Plan"	Ject been in an "At Red" state?			
Business Case Fi	Last Modified By Walker, Amy			Upcoming Milestones					
	Last Modified Date 2/27/2017 9:03	, AN		Status Message for th		· · · ·]			
Staffing				Week					
				Updated Date		m)			
Tasks (0)				Status Report - Week	Ŷ				
	Project Log	s include	Risks.	Accomp	lishments.	Action Ite	ems. Chan	nge Requests. Decis	ions and Issues
Project Log (7)	Devices Devices Les an						, enan	.80	
Dualast Duadasas	Project Project Log (7)							Pro Tip: Project	t Log links
Project-Predeces	Filter Project Log				New 🔻 Actions 🔻	\$			
	ID Title †	Assigned To	Status	Addt'l A	signed to Category Descri	pti Status Report - Mo	onthly Status Report - Sp	appear throug	nout innotas.
Portfolios (0)	14808487 A great title	Dollar, Grant	Open		Risk	Yes	Yes	The most useful	ul Proiect Log
	14808491 Accomplishment		Open		Accomp	Yes	Yes		
Notes (0)	14808495 Action Item	Dollar, Grant	Open		Action I		Yes	is accessed fro	m <i>within</i> a
	14808506 Change Request	Dollar, Grant	Transferred		Change		Yes	project in the	Project Section
Attachments (0)	14808525 Decision	Dollar, Grant	Open		Decision	Yes	Yes	project in the	roject Section
	14808528 Issue	Dollar, Grant	Open		Issue	Yes	Yes		
Baselines	14808532 Lesson Learned	Dollar, Grant	Transferred		Lesson				
Reports	Dashboard	s are wh	nere th	e Status	Reports a	re mainta	ained for	that project	
	Dashboards							Nota Ca	noral
Dashboards	View New Links Action	. •						Note: Ge	leral
	Title Descrip	tion	Owner	Туре	Linked Ex	cel Component	s Referenc		ds such as
Team	All Project Logs	,	Walker, Amy		4	6	0		m lindata and
	Sponsor Status Report Use this	s report. The "Proje \	Walker, Amy		Ф	5	0	PIVIO Tea	m update and
Alerts								Monthly	Reports are in
Settings	If the dash	oard yo	ou wan	t isn't li	sted, click I	Links to a	idd it	the Dashl	board link in

Cost RYG



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End Date

6/30/2019

5/4/2019

5/4/2019

Start Date 1

12/1/2018

12/4/2018

1/14/2019

Staffing

Staffing

Add Role

Project Manager

Business Analyst

Role

ITSMO

Add Resource

Resource

Manager, Project

& Resource, ITSMO

Analyst, Business

Similar to Build Team action in Project, resources are **Allocated/Added** on the Staffing page based on dates and headcount. A resource can be **generic** or a **specific person**

Roles Filter Off

Memo

Actions 💌

The List View (recommended) button displays resources in a compact format

> Note: Changing resources on the Staffing page impacts **all tasks** where that resources is assigned.

If a resource is generic, do an addition; if specific, do a replacement

Adding	ጲ	Scheduling	Resources
Auuiig	×	JUIEUUIIIg	NESUUICES

Resources are scheduled on the Tasks page or via the Scheduled resources column.

Add Resources from the Staffing Page. Generic resources can be filtered. Monthly availability based on (allocation) is displayed

The **Resource field** displays availability based on headcount within the task dates from the Staffing Page

Headcount

₽ 0

1.73

0.18

0.28

The **Scheduling tab** in the Task Details allows you to add Resources and Roles

										1		/					
Find Resource X					Tasks					< >	Build Business Case						
Resource: Search by name	Filter: Show All	~		Advanced Reset	Filter			🖣	•		Details	Scheduling	Notes (0)	S Attac	hments (0)		
Role: Any Role	- Date: 12/1/2018								.=		+ Resou •	- Role 🔻	Save Cance				
				(()	In Outl		Title				Role/Resource 1	Estimated	Scheduled	Actual	нтс		
Resource	rce Role Dec '18 Jan '19 Feb '19			Feb '19 Mai		All Tasks					Business Analyst	8.00 0.00					
🛓 Amin, Khushbu	Team Member	0	0	0	1	1	•	Concept	t		Dollar, Grant		8.00	0.00	8.00		
Analyst, Business	Business Analyst	0	۲	O	1.1	2		Buil	d Busine	ss Case	bonar, oranc		0.00	0.00	0.00		
Add Remove					Esti	mate	ed H	ours	are	defin	ed Actua	Hours ar	e populate	ed .			
Enter data for selected Resou	irces				by P	°M a	nd/	or ter	mpla	te	real-ti	me from	Timesheet	s			
Warn Resource Role	Memo	Start Date	End Date	Headcount													
Analyst, Business Business Analyst 12/1/2018 7/22/2019					Scheduled Hours are						Hours to complete (HIC) decrease by						
					defi	ned	per	task	by PN	N	Actual	Hours ba	sed on Est	imated	d Hours		
Project Start: 12/3/2018 Project Target: 7/22/2019 Add Selected Cancel				Selected Cancel							& can be updated on the timesheet by						
											the us	er or PM					