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.

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.

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

Project Logs include Risks, Accomplishments, Action Items, Change Requests, Decisions and Issues. Pro Tip: Project Log links appear throughout Innotas. The most useful Project Log is accessed from within a project in the Project Section.

Dashboards are where the Status Reports are maintained for that project. If the dashboard you want isn’t listed, click Links to add it.

Note: General Dashboards such as PMO Team Update and Monthly Reports are in the Dashboard link in the Navigation toolbar.
Innotas™ @ Emory
Quick Reference Guide

Tasks
Filters can be set based on multiple criteria
Expand/ Collapse
Indent/ Outdent
Create tasks based on four criteria (Above, Below, End & Child)
Add New, Copy Tasks easily add multiple tasks as Bulk New
Actions include multiple helpful items including:
• Edit
• Bulk Edit
• Move
• Delete

Note: There is no Undo (Ctrl-Z) in Innotas. Use Bulk Edit to make big edits (or undos). Bulk edit is also used to fill Billing type
Click to expand Task Details, which includes subtasks
Settings Icon displays which columns are shown and locked
Pro tip: First 3 columns are locked by default. Drag a column to touch the ‘Title’ column to lock when scrolling

Staffing
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
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 & Scheduling Resources
Add Resources from the Staffing Page. Generic resources can be filtered. Monthly availability based on (allocation) is displayed
Resources are scheduled on the Tasks page or via the Scheduled resources column.
The Resource field displays availability based on headcount within the task dates from the Staffing Page
The Scheduling tab in the Task Details allows you to add Resources and Roles

Estimated Hours are defined by PM and/or template
Scheduled Hours are defined per task by PM
Actual Hours are populated real-time from Timesheets
Hours to Complete (HTC) decrease by Actual Hours based on Estimated Hours & can be updated on the timesheet by the user or PM