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

Proj	jects (195)	In addition to custom filters, the project											
×		list will filter as you type into the text box											
Sa Prc	ved Filters	ivery Date H											
#.	Status: +Open Status: +Closed		Projects (6)										
#	+My Staffing Projects		Trainin	··· T	•								
#	Status: +Proposed		Project Name	Portfolio	Request	Status	Phase	PI Delivery Date	н				
#	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			c				
#	Mission = Foundation		Training Project	LITS: UIT	Patti Pate	Proposed	Concept	4/30/2018					
#	Mission = Research	2018	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					
*1	Misson = Education	2017 O											

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			this Month		
	Status* Proposed			Resource RYG			Planned for Next		
Sections «	Phase		+	Sponsor Attention	What outstanding decisions/ a	tions are needed from	Executive		
ections «	Schedule From Date * 12/1/2018				leadership/ sponsors?		Decisions/Issues		
	Planned Delivery Date 4/30/2018			Executive Risk Description	Executive Risk Description If project status is Yellow or Red: What's the issue causing the project (Red – Behind Plan/Yellow – At Risk)		Status Report - Monthly		
Details	Scheduled Finish Date 7/9/2019								
	% Complete - 0.00% Scheduled Hours				What have you done to escalat How long, in weeks, has this pr	oject been in an "At			
Business Case Fi	Last Modified By Walker, Amy				Risk* Yellow" or "Behind Plan*	"Red" state?			
usiness case i i	Last Modified Date 2/27/2017 9:05	АМ		Upcoming Milestones					
toffing.				Status Message for the					
Staffing				Updated Date					
				Status Report - Week					
asks (0)							-		
Project Log (7) Project-Predeces	Project Project Log (7)							Pro Tip: Project Log li	nks
roject-predeces	Filter Project Log			🔻 🔻	New Actions	e		appear throughout In	
	ID Title †	Assigned To	Status	Addt'l As	signed to Category Desc	ipti Status Report - Me	onthly Status Report - Sponse		
ortfolios (0)	14808487 A great title	Dollar, Grant	Open		Risk	Yes	Yes	The most useful Proje	ect Lo
	14808491 Accomplishment		Open		Accomp	Yes	Yes	is accessed from with	
lotes (0)	14808495 Action Item	Dollar, Grant	Open		Action I		Yes	is accessed from with	in a
	14808506 Change Request	Dollar, Grant	Transferred		Change		Yes	project in the Project	Secti
ttachments (0)	14808525 Decision	Dollar, Grant	Open		Decision	Yes	Yes	p. ejeet tile i i ejeet	
	14808528 Issue	Dollar, Grant	Open		Issue	Yes	Yes		
aselines	14808532 Lesson Learned	Dollar, Grant	Transferred		Lesson				
Reports	Dashboards	are wł	nere th	e Status	Reports a	re maint	ained for th		
Dashboards								Note: General	
	View New Links Actions							Dashboards such	1 25
Team	Title Descript		Owner	Туре		xcel Component	s References		
cum	All Project Logs		Walker, Amy		<u>କ</u>	6	0	PMO Team Upd	ate ar
lauta	Sponsor Status Report Use this	report. The "Proje	waiker, Amy		ď	5	0		
lerts	L							Monthly Reports	, are
	If the dashb	oard vo	าม พวก	t isn't lie	tod click	links to a	dd it	the Dashboard l	nk in
Settings									
- ceeiiigo	ii the dushe	oura ye			steu, chek			the Navigation t	

Cost RYG



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Quick Reference Guide



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	2	Scheduling	Resources
Auuilig	×.	JUIEUUIIIg	nesources

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

Find Resource X					Tasks			< >	Βι	uild Busine	ss Case						
Resource: Search by name Filter: Show All			Advanced Reset	Filter 🝸 👻					Details Cheduling Notes (0)				& Attachments (0)				
Role: Any Role - Date: 12/1/2018							+	Resou 🔻 H	Role 🔻	Save Cance	1						
				4 • • •	In	Outl		Title		Ro	le/Resource †	Estimated	Scheduled	Actual	нтс		
Resource	Role	Dec '18	Jan '19	Feb '19 Mai				All Tasks		Bu	siness Analyst	8.0	0	0.00			
🌢 Amin, Khushbu	Team Member	0	0	0		1	1	 Concept 			Dollar, Grant		8.00	0.00	8.00		
Analyst, Business	Business Analyst	0	۲	O		1.1	2	Build B	usiness Case		boliar, orant		0.00	0.00	0.00		
Add Remove									un dafin		A						
Enter data for selected Resou	rces							ed Hours a nd∕or tem		ea			e populate Timesheet				
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 (HTC) decrease by						
						defined per task by PM Actual Hours based on Estimated I						d Hours					
Project Start: 12/3/2018 Project Target: 7/22/2019 Add Selected Cancel						& can be updated on the timeshee						eet by					
											the us	er or PM					