Innotas™ @ Emory

Quick Reference Guide

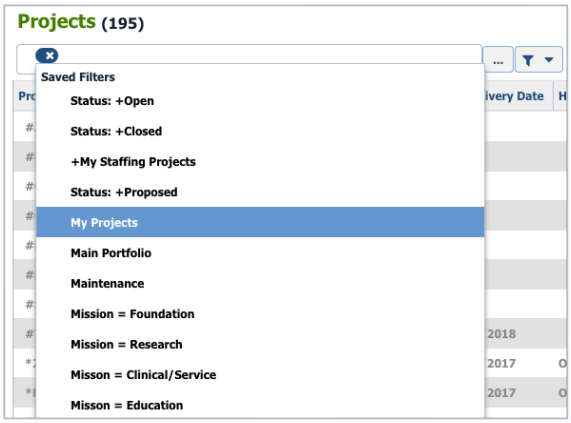
Navigation Toolbar

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

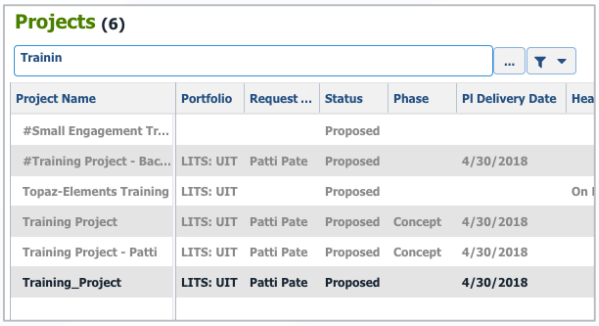
Use Bookmarks (top right) to quickly switch between pages and projects

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

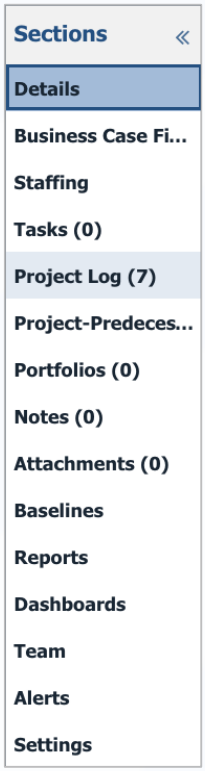


In addition to custom filters, the project list will filter **as you type** into the text box

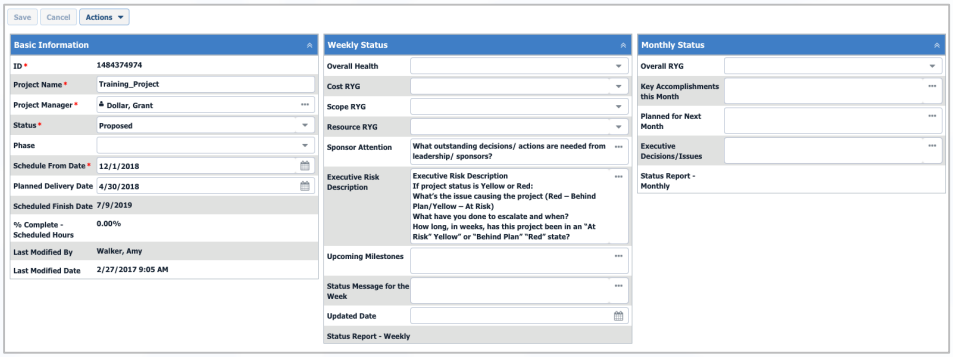


Project Sections

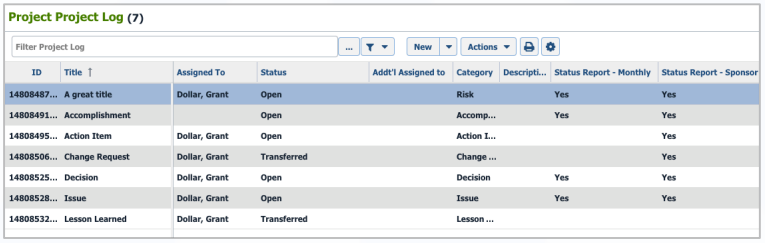
The Project Sections menu is used to manage different aspects of the project



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

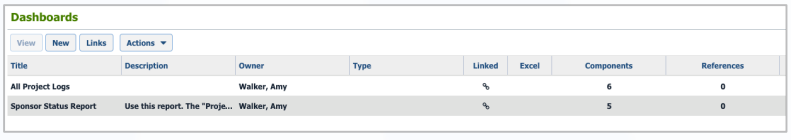


Project Logs include Risks, Accomplishments, Action Items, Change Requests, Decisions and Issues



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

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Tasks

Filters can be set based on multiple criteria

Expand/Collapse

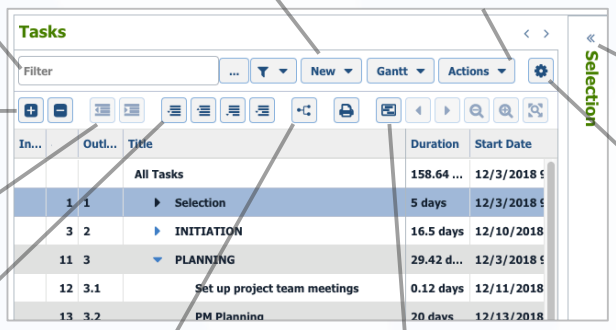
Indent/Outdent

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



Add/Edit **Dependencies**

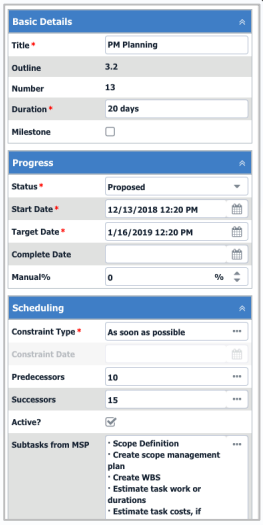
Quickly Hide or Show the **Gantt Chart**

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**

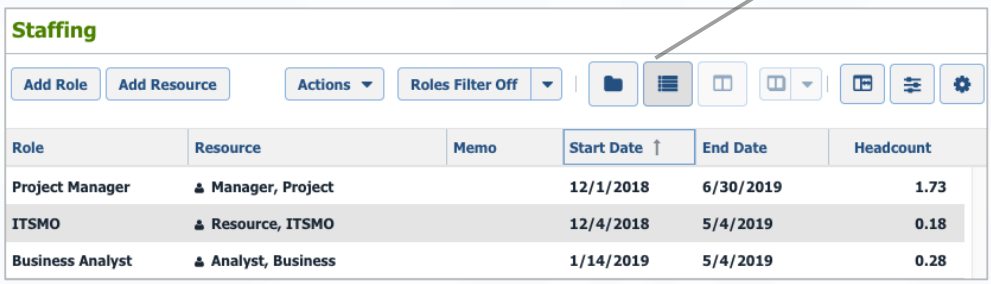
Pro tip: First 3 columns are locked by default. Drag a column to touch the 'Title' column to lock when scrolling



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

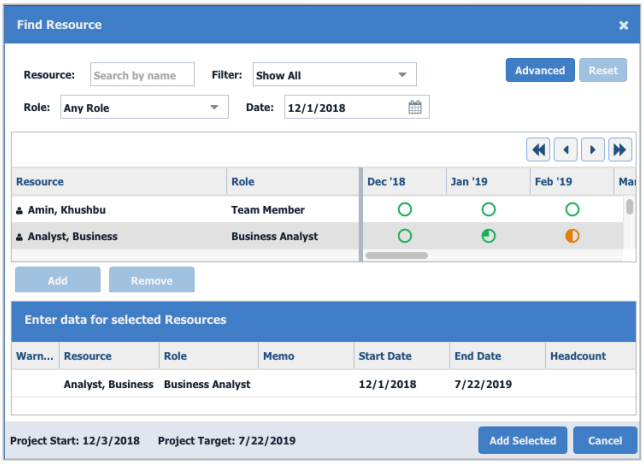
Adding & Scheduling Resources

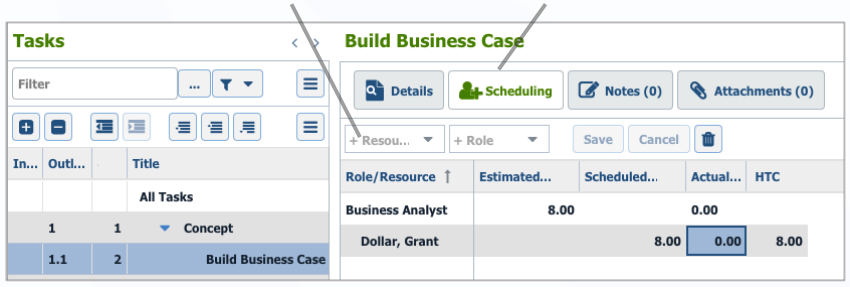
Resources are scheduled on the Tasks page or via the Scheduled resources column.

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

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