This QRC provides instruction on how to log in and work on What If scenario in Innotas.

The **What If Workbench** is an interactive tool that helps you perform resource capacity and demand analysis across organizational, portfolio, and departmental boundaries. You use the What If Workbench to quickly determine the impact of a new project on resource utilization or role demand, or to visualize the effect of potential changes to existing projects. You can experiment with moving resources around, shifting project dates, and excluding projects and/or roles to model a variety of scenarios. You can also add capacity (resources) or demand (projects) from within the workbench.

Fields with a red asterisk (*) are required.

### Log in to Innotas

| Go to: | https://purdueit.innotas.com |

Log in using **Career Account ID** and **Password**.

![Log in screen](image)

**Figure 1 Log in screen**

### Working with the What If scenarios List Page

The What If Scenarios List displays all the available scenarios and allows you to edit, delete, and view them - provided you have the appropriate visibility - as well as create new scenarios.

Double-click on a scenario to open it or select the record and click the **Open** button.

Click **New** to create a new scenario.

![What If Scenarios](image)

**Figure 2 What If scenario**
Action Menu:

<table>
<thead>
<tr>
<th>Actions Menu</th>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions</td>
<td>Edit Details</td>
<td>Brings up the Details dialog for the scenario. You can edit the name of the scenario, or change the scenario visibility. See Setting the Scenario Visibility.</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
<td>Deletes the selected scenario. You will be prompted to confirm the delete. Only the scenario owner can delete a scenario.</td>
</tr>
</tbody>
</table>

Customizing the What If List Page:
- Hover the cursor over any existing column title to display a drop-down list arrow.
- Choose the Columns submenu.
- Select or unselect the column(s) you wish to add/remove columns from the page.

Creating a scenario

From Navigation Toolbar, click What If scenario.

Click the New button to display the What if filters Setup.
Configure What If filters

Set the frequency by setting the Start Date and choosing Period: Monthly

Note: Period you choose will be used in the Workbench to set the increment for hitting projects, resource, and roles. Choose the number of intervals in the Number field. Monthly is limited to 12 months.

Use the Demand Filters to select the projects that you want to display.

Note: Roles filter should be left blank.

Use the Additional Resources filters to select other resources and projects.

Note: If you wish to work with a single project or a set of projects described by a filter, choose the filter from the droplist or create a new filter.
| note: The Resources filter lets you include additional resources based on the specified filter; these resources are in addition to any resources already allocated to the projects specified by the Projects filter. |

| The Projects filter allows you to constrain the list of projects displayed in the resources and roles grids. If you used the default None for the Projects filter, and do not use a filter for Projects (Additional Resources), the workbench displays resources/roles allocated for ALL projects. |

Click Run.

**Using the What If Workbench**

After you configure your What If filters, you use the What If Workbench to manipulate the data you loaded into it.
**Workload:** The top grid displays the workload for the project filters selected. The Workload grid is where you **shift** and **include/exclude** projects.

**Delta:** This column displays the shift or exclude offset. For example, if you shift a project out by 2 months, you will see +2mths in this column.

**Title:** The name of the project, role, or resource.

**Score:** The project score (only available if the project was scored).

**Priority:** The priority assigned to the project.

**Start:** The project start date.

**End:** The project end date.

**Demand:** Demand for a project summed up across all roles.

**Allocated:** Resource allocation booked for the project.

**Gap:** Resource allocation booked for the project.

**Resources/Roles Grids:** The bottom grid displays the Resources and Roles tabs.

The Resources grid displays all the resources allocated to the projects in the Projects grid.

The Roles grid displays all the roles demanded for the projects in the Projects grid.

**Note:** This section should only be used to pull resources into the Workload planning section. The resources and totals that are displayed in this section will not equal other capacity & demand reports using the same filter.

**Capacity:** Capacity for a resource’s primary organization role.

**Allocated:** Resource allocation booked for the project.

**Available:** Capacity minus Allocated. Negative numbers represent over-booking.
Charts: Charts help us to visualize the data for demand, capacity, resources allocation, and available resources.

The Action menu:

Filters: Brings up the Filters dialog to make changes to the data and run the scenario.
Save: Saves the current scenario, including any changes
Save As: Saves a copy of the current scenario.

Print Changes: Generates a list of all the changes made to the scenario.
Customizing the Workbench

To add/remove columns:
- Hover the cursor over any existing column title to display a drop-down list arrow.
- Choose the Columns submenu.
- Select or unselect the column(s) you wish to add/remove columns from the page.

To sort columns:
You can sort any column in by king in the column heading. You can toggle the sort order between Ascending and clic Descending by clicking again.

Manipulating your data in the Workload section
### Shifting a project, Resource, or Role:

Shifting means moving its demand by weeks or months, depending on the Frequency filter. Shifting only moves the allocation contour and not the start or target date of the project.

- Right-click the project you wish to shift and choose **shift**.
- Shift the slide bar to shift the project out. You can click the left/right arrows to shift.
- The **Shifted** label displays the size of the shift.

### Excluding Projects, Resources, and Roles:

You can exclude projects to remove their demand from your analysis. When you exclude a project, you also exclude its underlying demand and allocations.

You can also exclude resource and roles, without excluding the projects to which they have been allocated.

- In the Workload or Resources grid, right-click the project you wish to exclude and choose **Exclude**.
- To add the project, resource, or role back into the mix, right-click on it and choose **Include**.

### Booking Resources:

If there is a gap on the project demand, user can book a resource to fill the gap. If there are multiple booked resources, then the gap is evenly split between the resources. You can drag a resource from the bottom resource grid and drop it on the role to book a resource for that project role.
Once you have made all the changes and want to save your Scenario – click the Action Icon – **Save** or **Save As**.