

**Dorset Portfolio
Management Office**

Celoxis

**A step-by-step
guide**

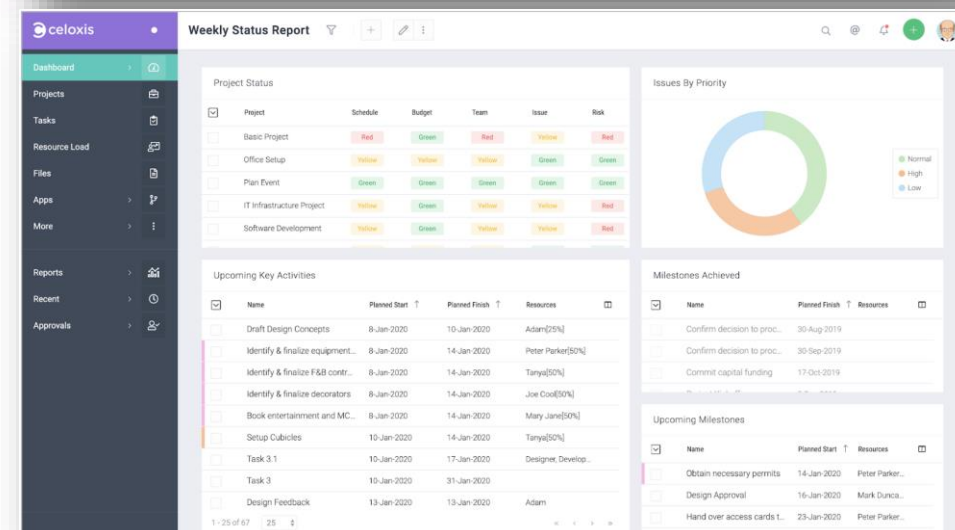
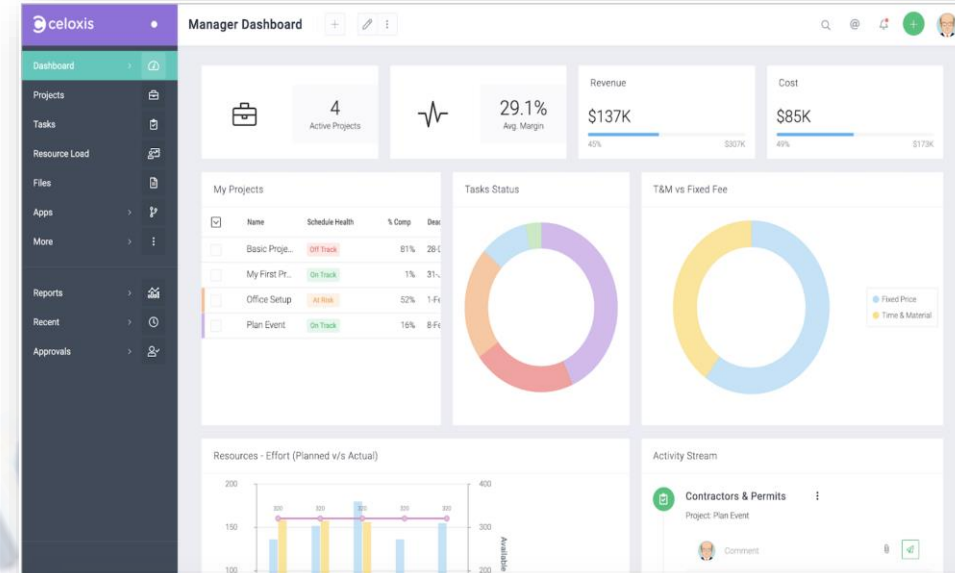


A step-by-step guide to Celoxis

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- Interactive Gantt
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Getting started >>>>

Login and Preferences

Log in at celoxis.com

Enter your email address and password (when you log in for the first time, the password will be Origin121*#* Change your password the first time you log in

Your default dashboard will be your home screen

Click on your initials in the top right to open your menu

Access help, your profile and the Knowledge base

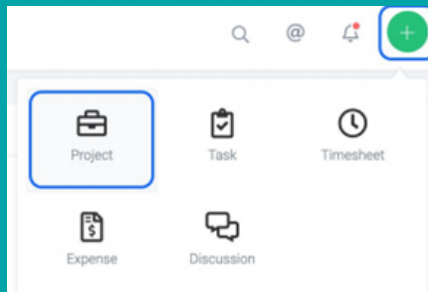
Open your profile to change your password...

...and set your notification preferences

Setting up a project >>>

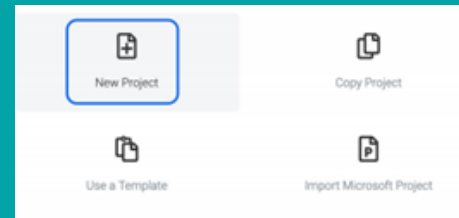
Set Up A New Project - new

Click the + icon at the top right of the screen



Then select 'Project'

Select 'New Project'



The 'Add Project' screen will open

A screenshot of the 'Add Project' form. It has tabs for 'Basic', 'Advanced', 'Description', and 'Custom Fields'. The 'Basic' tab is active. The form contains the following fields:

- Name:
- Planned Start: (calendar icon)
- Deadline: (calendar icon)
- Manager:
- Client:

Set Up A New Project

Basic Tab:

- Name ***: Text input field.
- Planned Start ***: Date picker (2/16/2021).
- Deadline**: Date picker.
- Manager**: Dropdown menu (Heather Payne).
- Client**: Dropdown menu (- No Client -).
- State**: Dropdown menu (Draft).
- Priority**: Dropdown menu (Normal).

Advanced Tab:

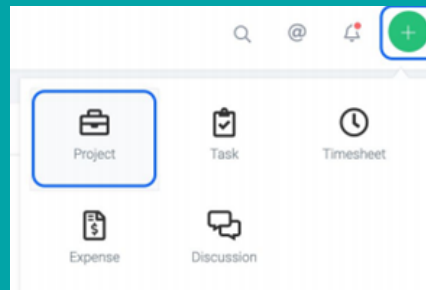
- Workspace ***: Dropdown menu (Comms & Engagement).
- Code**: Text input field.
- FINANCIALS**: Section header.
- Budget**: Text input field.
- PORTFOLIO**: Section header.
- Risk**: Dropdown menu (Normal).
- Benefit**: Dropdown menu.
- Alignment**: Dropdown menu.
- OPTIONS**: Section header.
- Tasks should start when all predecessors are complete.
- Do not send email notifications for this project.

Callout Boxes:

- Insert your basic project information**: Points to the Name field.
- In the 'Advanced' tab, you will have workspace options dependant on your role. If you belong to more than one, you will need to change this**: Points to the Workspace dropdown.
- In the 'Custom Fields' tab, please select 'Standard project'**: Points to the Code field.
- Insert a code with a prefix relevant to your workspace, e.g. P_001, UEC_001**: Points to the Code field.
- You can select multiple clients from the same organisation**: Points to the Client dropdown.
- Set the state to one that represents the phase of the project**: Points to the State dropdown.
- Scroll down and set 'Default Task Schedule Type' to 'Fixed Duration' for all projects**: Points to the Options section.
- Click 'Save' to create the project**: Points to the Save button.

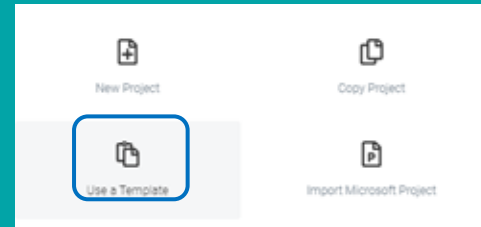
Set Up A New Project - template

Click the + icon at the top right of the screen

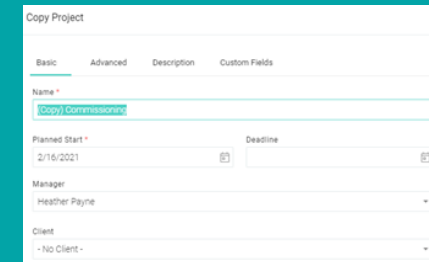


Then select 'Project'

Select 'Project' and then 'Use a Template'



Fill out and change the relevant details

A screenshot of the 'Copy Project' form. The form has tabs for 'Basic', 'Advanced', 'Description', and 'Custom Fields'. The 'Basic' tab is selected. The form contains the following fields: 'Name' (with a dropdown menu showing 'Copy Commissioning'), 'Planned Start' (with a date picker set to 2/16/2021), 'Deadline' (with a date picker), 'Manager' (with a dropdown menu showing 'Heather Payne'), and 'Client' (with a dropdown menu showing '- No Client -').

The project screen >>>

The Project Screen

The screenshot displays the 'Our Dorset' Project Screen for 'KE Project test'. The interface includes a top navigation bar with tabs: Overview, Snapshot, Project status upd..., Kanban, Project Plan, Risk & Issue Regist..., Resource View, Lessons Log, and Benefit Register. The main content area shows a 'SCHEDULE' view with a Gantt chart for 'Rollout Complete' on 23 Aug 21, spanning from 20 Nov 20 to 12 Jan 22. A 'Future' donut chart shows 29 items. A 'TEAM' section lists members: P, HP, KE, MM, SW, T. A 'COST' section shows £0. A 'Risks/Issues' section shows 3 items. A 'TASKS STATUS' section shows 'On Track' for 12 Jan 22. A sidebar on the left contains navigation options: Dashboard, Projects, Tasks, Workload, Apps, More, Reports, and Recent. A 'Portfolio dashb' section is also visible.

Interactive Gantt

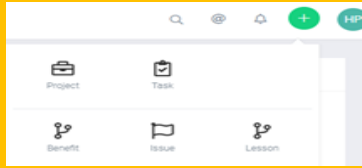
This toolbar is in every screen in the project >>>

- Edit project details
- Add tasks, risks, lessons etc
- Import, recalculate, print etc

Adding to your projects >>>>

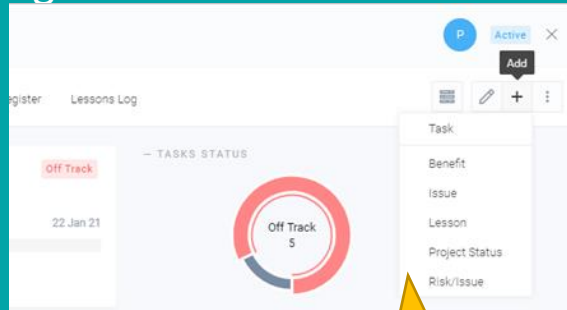
Adding To Your Projects

As with projects, you can also do this by clicking the green add button on any other screen



Change the Duration to '0' to make it a milestone

In the project screen, go to the 'Add' button in the top right corner. Select 'Add task'



This is also where you add all other items to your projects

Add the details and predecessors if necessary

You can create the tasks without assigning resources - more info in the 'Assigning Resources' section

Select the team member responsible and save

Click before saving to immediately add another task

Interactive Gantt

Planning and tracking can all be done in the Gantt screen. You can also bulk add tasks using the 'multiple' option.

Set baselines, recalculation projections after amendments and export as CSV or to MS Projects

Change the time period, view the critical path and turn off the Gantt option. You can also print to PDF, HTML or Image

The screenshot shows the 'Interactive Gantt' software interface. On the left is a task list with columns for task name, planned start, planned finish, predecessors, and duration. A 'Multiple' dropdown menu is open, showing options like 'Copy from another project', 'Import CSV', and 'Import Microsoft Project'. The main Gantt chart area displays a project schedule from 2021, with tasks represented by horizontal bars and dependencies shown as arrows. A 'Critical path' is highlighted in red. A task detail popup is visible for 'Initial Design', showing its start and end dates and progress. Callout boxes provide instructions: 'Planning and tracking can all be done in the Gantt screen. You can also bulk add tasks using the 'multiple' option. Set baselines, recalculation projections after amendments and export as CSV or to MS Projects'; 'Change the time period, view the critical path and turn off the Gantt option. You can also print to PDF, HTML or Image'; 'Use the sliders to drag items and update progress.'; 'Click to make quick edits. Right click on a task to open the task edit screen'; and 'Hover over an item to see more detail'.

Assigning Resources

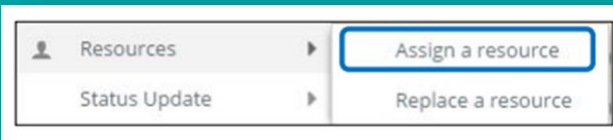
Select the task and click below the 'Resources' column. You can assign multiple resources to a task, and assign resources multiple times.

ID	Name	Start	Finish	Resources
	▼ Sample: Office Setu...	8-Apr-16	11-May-16	
1	Task 2	12-Apr-16	12-Apr-16	<input type="text"/>

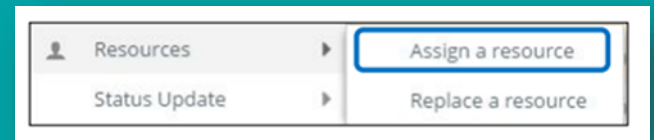
If you don't know exactly who will be assigned a task, you can add a 'job role'

You can also assign resources with % or hours to be allocated

Alternatively, you can right-click on a task and assign resources from there.



Use the same method to replace a resource. Multiple tasks can be selected to make a replacement.



Running Reports

The screenshot displays the 'Our Dorset' Portfolio dashboard. On the left is a navigation menu with options: Dashboard, Projects, Tasks, Workload, Apps, More, Reports, and Client. The main dashboard area is titled 'Portfolio dashboard' and contains several widgets: 'Active Projects' (0), 'Plans off Track' (5), 'Manager Project Health' (a donut chart with segments for Off Track, At Risk, and Not Active), and 'Risks' (a vertical bar chart with a 'Probability Score' scale from 1-Rare to 5-Almost Cert). On the right is an 'All Reports' panel with a search bar and filter buttons for 'All Reports', 'Favourite', 'App', 'Task', 'Project', 'Activity Log', 'Time Phased', and 'Dashboard'. Below these are various report cards, each with a star icon for favoriting. A yellow callout bubble points to the star icon on the 'At Risk Tasks' report.

Filter your search to the report type you are looking for

This menu will show your favourite, or starred, reports and the 'All Reports' option

To favourite a report, simply click a star. Click again to remove it as a favourite

Running Reports - Printing

Our Dorset | **Problematic Critical Tasks** | Total • 23

Change filters to specify what you want to see on the report

Select the print option to create a PDF, HTML or Image version of the report

For more information on reports visit the Knowledge Base

You can customise the output to suit your needs

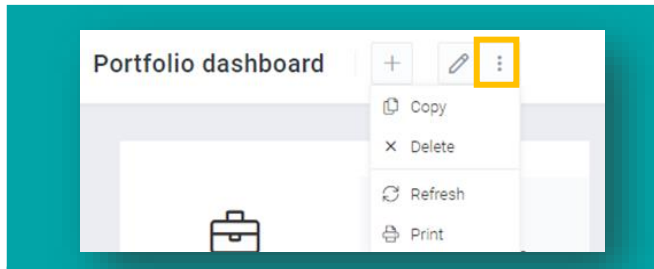
Task	Off Track	At Risk	Blocked	Total
EHCH Digital Test	2	0	0	2
Good CoP	1	0	2	3
Home First	0	1	0	1
KE Project test	2	0	4	6
LVS Critical Pathway	3	0	0	3
OAN_004_008 - Critical Care	7	0	0	7

Legend: Off Track - 16, At Risk - 1, Blocked - 6

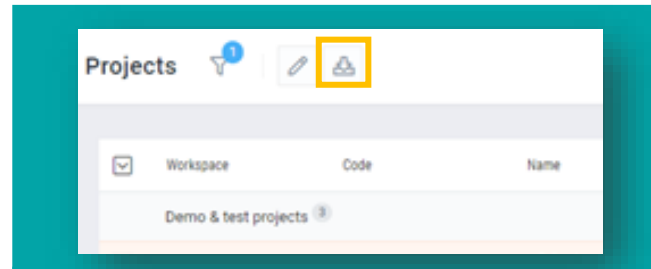
Print dialog options:
Fit Width: A4
Orientation: Landscape
DPI: 135
Output: PDF (selected), Html, Image
Buttons: CANCEL, SUBMIT

Printing and Exporting

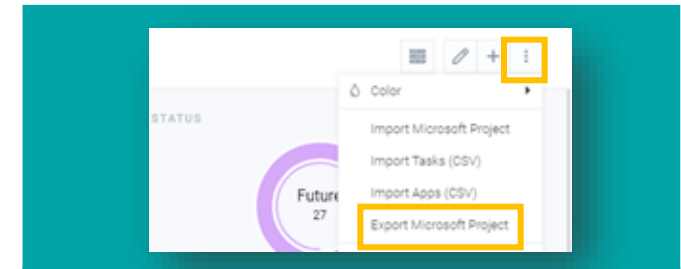
There are options for printing, downloading or exporting in almost every screen. Look for the following icons.



- Click the 3 dots
- Select print



- Click to download as CSV, CSV grouped or print



- Click in the corner of the project screen
- Print option also available

Search / Your Profile

Search

Keywords * sample Type - All - Go

Type	Name	Score	Created
Risk/Issue	Generic PMO sample risk PMO	100	20 Nov 20
Risk/Issue	Home first example risk Home First	50	20 Nov 20
Project St...	Test Status 1 Home First	25	20 Oct 20

CLOSE

Use the search to quickly find or shortcut to a specific item

The match score indicates how close the result is to the search term

Search

Keywords * sample Type All Go

- All -
- Project
- Task
- File
- Apps
- Discussion
- People

Type	Name	Created
Risk/Issue	Generic PMO sample risk PMO	20 Nov 20
Risk/Issue	Home first example risk Home First	20 Oct 20
Project St...	Test Status 1 Home First	20 Oct 20

CLOSE

Filter the results to help refine your search

My Settings

Basic Custom Fields Preferences

Name *
Team Member (test)

Email pmo@dorsetccg.nhs.uk Phone

Keywords

Reporting Manager
Project Manager (test)

Login * team_member Old Password New Password Confirm

CANCEL SAVE

Click on your initials in the top right of the screen, then select 'Profile'

Passwords must be 12 characters in length and can be any combination

You can change your password here. Please leave your login as your email address

Quick Tips and Useful Information

Filters are available in most screens >>> see examples >>>

Use Chrome, Safari or Firefox to access as these are supported browsers

When you change the Gantt zoom, this is remembered for printing

To search a phrase, enclose it in quotes e.g. "sales tax"

To include or exclude a search term, prefix it with + or - e.g. +Microsoft/ -Office

Columns and grouping only affects your view in dashboards and reports

Critical pathway only highlights the critical tasks, not the path

You can assign colours to tasks, but would need to have your own key e.g. assigning colours to team members or task types >>>

You can mention another user in comments by using the '@' function followed by their name

Drag the slider to expand the project screens

Portfolio dashboard

Benefit Register Lessons Log

Due Date: - Any -

Open: Yes

Risk Score: - Any -

CLEAR RESET APPLY

19 Active Projects

7 Plans off Track

Look for the filter icon in most screens to see the information you need

5	Good CoP Engagement	1 Jan 21	11 Ja...	4	7 days
6	SID update	11 Jan ...	11 Ja...	5	0 days
7	▶ Initial Design			1	39 d...
12	▶ PMO internal Testing			7	35 d...
22	▶ Final Design			12	35 d...
30	▶ Rollout Communicati				
33	▼ Review & Close				
34	Undertake Post La				
35	Close Project				
36	Project Close Proc				
37	Project Complete				

Columns and grouping icon

Right click on a task in the Gantt to open this menu

- Cut (Ctrl+X)
- Copy (Ctrl+C)
- Paste (Ctrl+V)
- Indent
- Outdent
- Color
 - No Color -
 - Blue
 - Yellow
 - Purple
 - Green
 - Pink
 - Indigo
 - Cyan
 - Red
- Delete Dependency
- Resources
- Status Update
- Edit (E)
- View Details (V)
- Recur

More Tips >>>

Quick Tips and Useful Information

You can change your theme to *Vivid* so colours appear bolder

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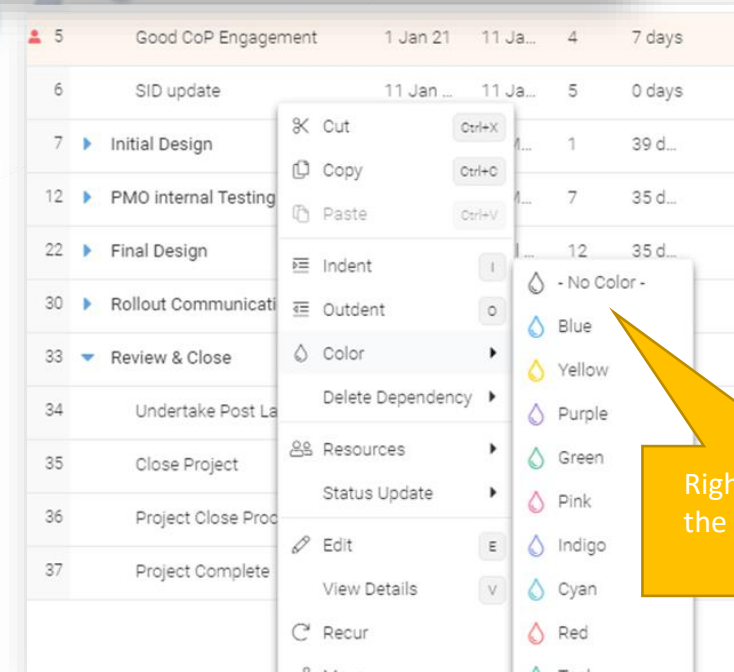
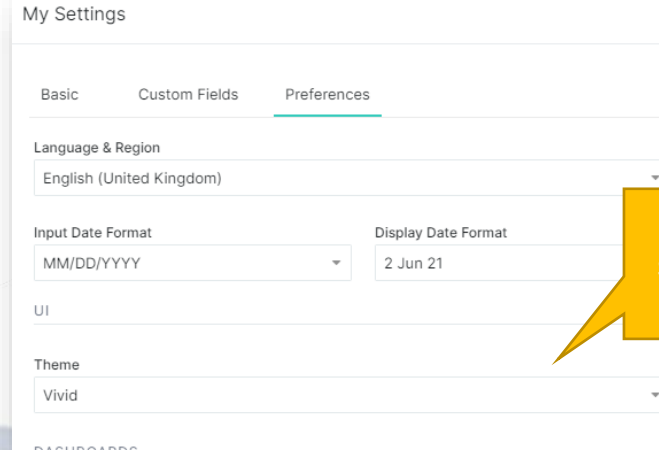
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FAQs

Why is nothing showing on my reports or dashboards?

- Look for the filter icon  and ensure you only have necessary filters on, otherwise click 'Clear' to see all available results

Why are my project health indicators not showing?

- Check that your project state is 'Active'. Health indicators do not show in 'Draft' state

I made some changes but my status calculations have not changed.

- Click the 'Recalculate Projections' button in the project screens to update status

How can I add a new user?

- Please contact the PMO to add a new user (PMO@dorsetccg.nhs.uk)

Is there more training available for myself or my team?

- Contact the PMO to discuss your training and user needs, or alternatively join our [Teams channel](#) where we post all our updates

Remember, you can use the 'Demo & test' workspace to practice and get used to the system