

# Design & Development Case Study

---

Problem Solving & Process Simplification

W Greg Raley-Barrett

# Problem Statement



Education Development Management (EDM) Team Project Management Tool



EDM needed a streamlined method for onboarding internal clients and managing work requests.



EDM wanted a way to manage workloads and track projects.



EDM was looking for a way to measure success, track work statuses and report metrics.

# Requirements Gathering

This project tracker would be a proof-of-concept tool that could be replicated for other business units.

The project tracker had to use existing software and tools. No budget was available for third-party software/systems.

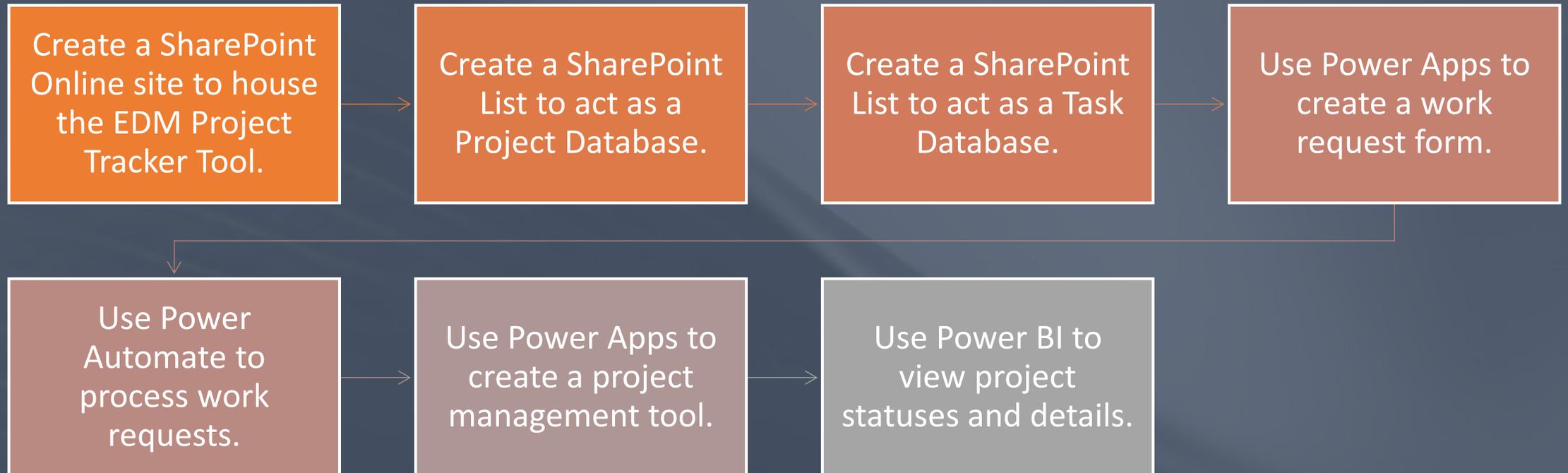
The project tracker should be simple and intuitive so that minimal training would be needed to use it.

# Process



- Review the process for onboarding new projects and managing requests for work.
- Verify that all parties had proper permissions and access to appropriate databases and resources.
- Create a process map diagramming workflows, detailing variables and permissions.

# Solution



# Project Request Form

Education Development Management Request Tool

 Education Development Management

\* Project Name

Site Contact

Lookup Name

Target Community

Project Type

Requested Completion Date

Requirements & Deliverables

There is nothing attached.

# Project Request Form Details

- Form automatically captures logged in user information and time stamps the submission request.
- Form kept as simple as possible with enough information to triage the request.
- Once a request is submitted, an email alert goes out to the EDM team and the request is marked as a New Request.

The screenshot shows a web browser window displaying the Pfizer Education Development Management Request Tool. The browser's address bar shows a URL starting with 'https://apps.powerapps.com/play/e/default-7a916015-20ae-4ad1-9170-eeef915e9272/a/92739835-3953-458e-b4b4-f4e252de2358?tenantid=7a916015-20ae-4ad1-9170-eeef915e9272'. The browser's tab title is 'Power Apps | Education Development Management Request Tool'. The form itself is titled 'Pfizer Education Development Management' and includes the following fields:

- Project Name:** A text input field.
- Site Contact:** A dropdown menu with 'Lookup Name' as the selected option.
- Target Community:** A text input field.
- Project Type:** A dropdown menu with 'Select One' as the selected option.
- Requested Completion Date:** A date input field.
- Requirements & Deliverables:** A large text area for entering details.
- Attachments:** A section with the text 'There is nothing attached.' and a button labeled 'Attach documents here'.
- Submit:** A blue button labeled 'SUBMIT' at the bottom center.

# Project List by Status

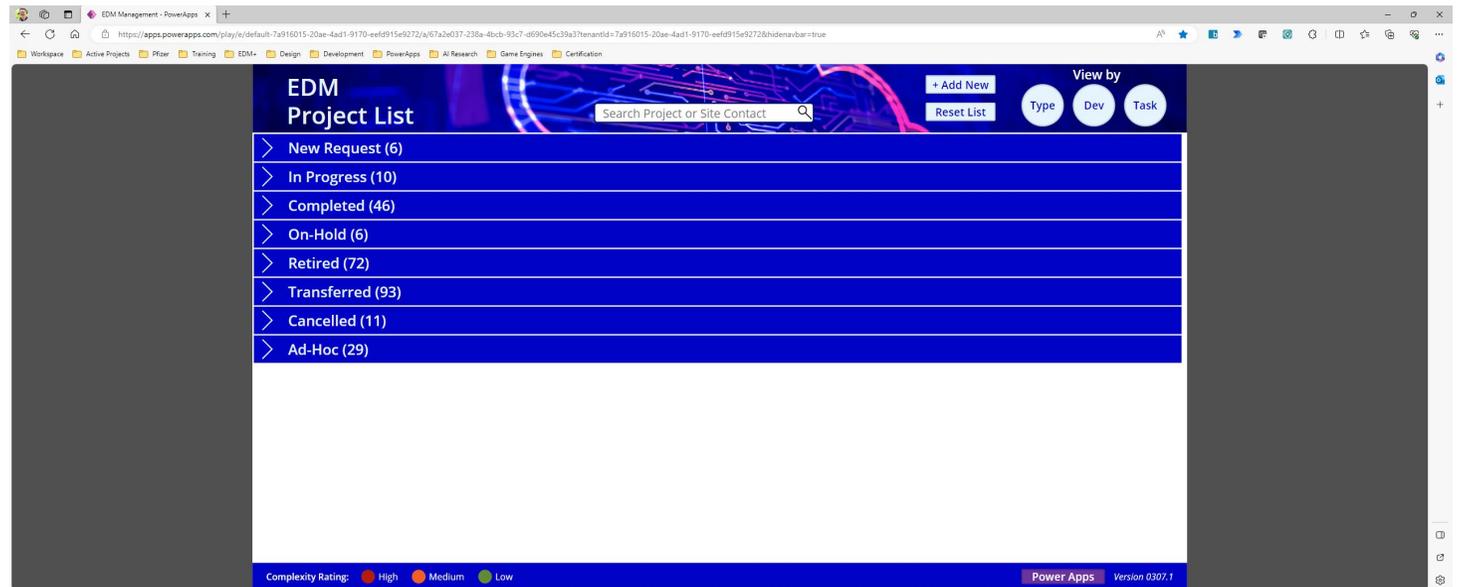
The screenshot displays a Power Apps interface for 'EDM Management - PowerApps'. The main content area is titled 'EDM Project List' and features a search bar labeled 'Search Project or Site Contact'. To the right of the search bar are buttons for '+ Add New' and 'Reset List'. Below these are three circular buttons for 'View by' with options 'Type', 'Dev', and 'Task'. The central part of the interface is a list of project statuses, each with a chevron icon and a count in parentheses:

- > New Request (6)
- > In Progress (10)
- > Completed (46)
- > On-Hold (6)
- > Retired (72)
- > Transferred (93)
- > Cancelled (11)
- > Ad-Hoc (29)

At the bottom of the interface, there is a 'Complexity Rating' section with three colored circles: High (red), Medium (orange), and Low (green). The bottom right corner shows 'Power Apps Version 0307.1'.

# Project List by Status

- The EDM Project List groups the projects by Status with the totals listed for each grouping.
- There are buttons to also display the list by Type, Developer Assigned, or Task Lists.
- A search box is included to filter by project name, developer name, or client name.



# Project List – In Progress

The screenshot shows a Power Apps interface for an 'EDM Project List'. The header includes a search bar, '+ Add New' and 'Reset List' buttons, and 'View by' options for 'Type', 'Dev', and 'Task'. The list is filtered to show 'In Progress (10)' items. Each item includes a complexity rating (High, Medium, or Low), project name, type, requested completion date, lead developer, and contact information. Action buttons for 'LINK' and a right-pointing arrow are provided for each project.

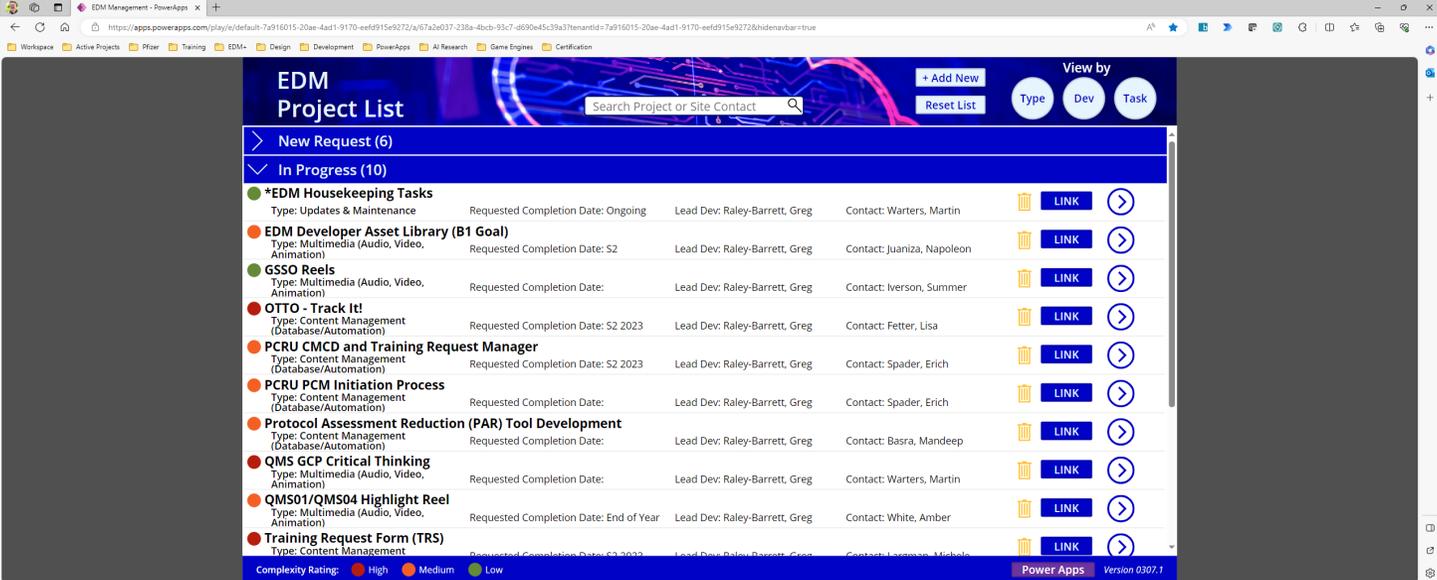
Complexity Rating	Project Name	Type	Requested Completion Date	Lead Dev	Contact	Actions
Low	*EDM Housekeeping Tasks	Updates & Maintenance	Ongoing	Raley-Barrett, Greg	Warters, Martin	LINK, Arrow
High	EDM Developer Asset Library (B1 Goal)	Multimedia (Audio, Video, Animation)	S2	Raley-Barrett, Greg	Juaniza, Napoleon	LINK, Arrow
Low	GSSO Reels	Multimedia (Audio, Video, Animation)		Raley-Barrett, Greg	Iverson, Summer	LINK, Arrow
High	OTTO - Track It!	Content Management (Database/Automation)	S2 2023	Raley-Barrett, Greg	Fetter, Lisa	LINK, Arrow
High	PCRU CMCD and Training Request Manager	Content Management (Database/Automation)	S2 2023	Raley-Barrett, Greg	Spader, Erich	LINK, Arrow
High	PCRU PCM Initiation Process	Content Management (Database/Automation)		Raley-Barrett, Greg	Spader, Erich	LINK, Arrow
High	Protocol Assessment Reduction (PAR) Tool Development	Content Management (Database/Automation)		Raley-Barrett, Greg	Basra, Mandeep	LINK, Arrow
High	QMS GCP Critical Thinking	Multimedia (Audio, Video, Animation)		Raley-Barrett, Greg	Warters, Martin	LINK, Arrow
High	QMS01/QMS04 Highlight Reel	Multimedia (Audio, Video, Animation)	End of Year	Raley-Barrett, Greg	White, Amber	LINK, Arrow
High	Training Request Form (TRS)	Content Management	S2 2023	Raley-Barrett, Greg	Laxman, Michele	LINK, Arrow

Complexity Rating: High (Red), Medium (Orange), Low (Green)

Power Apps Version 0307.1

# Project List – In Progress

- Each grouping can be expanded to see a list of projects within each status.
- High level information can be seen at a glance for ease of project management, i.e. project type, requested completion date, contacts.
- Each item is color coded to indicate project complexity.



The screenshot displays the 'EDM Project List' application interface. The header includes a search bar for 'Project or Site Contact', a '+ Add New' button, and a 'View by' dropdown menu with options for 'Type', 'Dev', and 'Task'. The main content area is divided into sections: 'New Request (6)' and 'In Progress (10)'. The 'In Progress' section contains a list of projects, each with a color-coded complexity rating (High, Medium, or Low), a project name, type, requested completion date, lead developer, and contact information. Each project entry includes a 'LINK' button and a right-pointing arrow icon.

Complexity Rating	Project Name	Type	Requested Completion Date	Lead Dev	Contact	Actions
Low	*EDM Housekeeping Tasks	Updates & Maintenance	Ongoing	Raley-Barrett, Greg	Warters, Martin	LINK, Arrow
High	EDM Developer Asset Library (B1 Goal)	Multimedia (Audio, Video, Animation)	S2	Raley-Barrett, Greg	Juaniza, Napoleon	LINK, Arrow
Low	GSSO Reels	Multimedia (Audio, Video, Animation)		Raley-Barrett, Greg	Iverson, Summer	LINK, Arrow
High	OTTO - Track It!	Content Management (Database/Automation)	S2 2023	Raley-Barrett, Greg	Fetter, Lisa	LINK, Arrow
High	PCRU CMCD and Training Request Manager	Content Management (Database/Automation)	S2 2023	Raley-Barrett, Greg	Spader, Erich	LINK, Arrow
High	PCRU PCM Initiation Process	Content Management (Database/Automation)		Raley-Barrett, Greg	Spader, Erich	LINK, Arrow
High	Protocol Assessment Reduction (PAR) Tool Development	Content Management (Database/Automation)		Raley-Barrett, Greg	Basra, Mandeep	LINK, Arrow
High	QMS GCP Critical Thinking	Multimedia (Audio, Video, Animation)		Raley-Barrett, Greg	Warters, Martin	LINK, Arrow
High	QMS01/QMS04 Highlight Reel	Multimedia (Audio, Video, Animation)	End of Year	Raley-Barrett, Greg	White, Amber	LINK, Arrow
High	Training Request Form (TRS)	Content Management	S2 2023	Raley-Barrett, Greg	Larsen, Michelle	LINK, Arrow

# Project Details - General

The screenshot shows a web browser window displaying the 'EDM Project Details' form. The browser's address bar shows a URL from 'apps.powerapps.com'. The form has a blue header with the title 'EDM Project Details' and 'CANCEL' and 'SAVE' buttons. Below the header are four tabs: 'General' (selected), 'Details', 'Checklist', and 'Tasks'. The main form area is titled 'Training Request Form (TRS)' and contains several sections of input fields:

- Content Management (Database/Automation)**: A dropdown menu set to 'Content Management (Database/Automation)'.
- Status**: A dropdown menu set to 'In Progress'.
- Lead Developer**: A dropdown menu set to 'Raley-Barrett, Greg'.
- Audience**: A text input field containing 'Who will use/access the deliverable'.
- Site Contact**: A dropdown menu set to 'Largman, Michele'.
- Stakeholder/Sponsor**: A dropdown menu set to 'Look Up Name'.
- Complexity Rating**: A dropdown menu set to '3-High'.
- Power App?**: A toggle switch that is turned on.
- Power App Type**: A dropdown menu set to 'D) Complex Application'.
- Requested Completion Date**: A text input field containing 'S2 2023'.
- Go Live Date**: A date picker field showing 'MM/DD/YYYY'.
- Retirement Date**: A date picker field showing 'MM/DD/YYYY'.
- Featured Site**: A toggle switch that is turned off.
- External Sharing**: A toggle switch that is turned off.
- Link**: A text input field containing 'https://pfiizer.sharepoint.com/sites/Training-Request/SitePages/Home.aspx'.
- Legacy Site**: A text input field containing 'http://sharepoint2.pfiizer.com/sites/TrainingRequest/SitePages/Home.aspx'.

At the bottom of the form, there is a summary row:

- Created By**: Raley-Barrett, Greg
- Created**: 1/7/2021 4:01 PM

Below the summary row is a blue bar with the **ID** 192.

# Project Details - General

- Opening the project defaults to the General tab.
- This tab displays top level information for the project.
- This is a smart form that will only display appropriate choices based on project type.
- Helper text is provided for each input type.

The screenshot shows a web browser window displaying the 'EDM Project Details' form. The browser's address bar shows a URL from 'apps.powerapps.com'. The form has a blue header with the title 'EDM Project Details' and 'CANCEL' and 'SAVE' buttons. Below the header is a tabbed interface with 'General', 'Details', 'Checklist', and 'Tasks' tabs. The 'General' tab is active, showing a 'Training Request Form (TRS)' dropdown menu. Below this are two dropdown menus: 'Content Management (Database/Automation)' and 'In Progress'. The form contains several input fields and controls:

- Lead Developer:** A dropdown menu with 'Raley-Barrett, Greg' selected.
- Audience:** A text input field with 'Who will use/access the deliverable' as placeholder text.
- Site Contact:** A dropdown menu with 'Largman, Michele' selected.
- Stakeholder/Sponsor:** A dropdown menu with 'Look Up Name' as placeholder text.
- Complexity Rating:** A dropdown menu with '3-High' selected.
- Power App?:** A toggle switch that is currently turned on.
- Power App Type:** A dropdown menu with 'DJ Complex Application' selected.
- Requested Completion Date:** A date input field with 'S2 2023' entered.
- Go Live Date:** A date input field with 'MM/DD/YYYY' as placeholder text.
- Retirement Date:** A date input field with 'MM/DD/YYYY' as placeholder text.
- Featured Site:** A toggle switch that is currently turned off.
- External Sharing:** A toggle switch that is currently turned off.
- Link:** A text input field with the URL 'https://pfizer.sharepoint.com/sites/Training-Request/SitePages/home.aspx' entered.
- Legacy Site:** A text input field with the URL 'http://sharepoint2.pfizer.com/sites/TrainingRequest/SitePages/home.aspx' entered.

At the bottom of the form, there is a 'Created By' field with 'Raley-Barrett, Greg' and a 'Created' timestamp of '1/7/2021 4:01 PM'. Below this is a blue bar with the text 'ID 192'.

# Project Details - Details

EDM Project Details

CANCEL SAVE

General Details Checklist Tasks

Training Request Form (TRS)

Content Management (Database/Automation) In Progress

Details

Requirements & Deliverables

Attachments

Created By Raley-Barrett, Greg Created 1/7/2021 4:01 PM

ID 192

Format | B / U | [Link] [Image] [Delete]

- upgrading legacy Infopath to PowerApps platform
- incorporating new processes due to MEL launch
- incorporating import functionality from ST Tracker
- making the system more modular to make it more efficient and easier for future upgrades and changes.
- currently developing core form on new platform to be ready for initial testing

<https://teams.microsoft.com/file/09E1E934-FC45-434C-A869-2A9508A12259?tenantId=7a916015-20ae-4ad1-9170-eefd915e9272&fileType=docx&objectUrl=https%3A%2F%2Fpfiger.sharepoint.com%2Fsites%2FTRSFormDevelopmentDesign%2FShared%20Documents%2FGeneral%2FTRAINING%20REQUEST%20SUBMISSION%20FORM.docx&baseUri=https%3A%2F%2Fpfiger.sharepoint.com%2Fsites%2FTRSFormDevelopmentDesign&serviceName=teams&threadId=19:b35007b089eb4a1bb11678809aba4dd2@thread.v2&groupId=7eb44a1-4608-4410>

There is nothing attached.

Attach file



# Project Details - Checklist

The screenshot shows a web browser window displaying the 'EDM Project Details' page. The browser's address bar shows a URL from 'apps.powerapps.com'. The page has a dark blue header with the title 'EDM Project Details' and 'CANCEL' and 'SAVE' buttons. Below the header are four tabs: 'General', 'Details', 'Checklist', and 'Tasks', with 'Checklist' being the active tab. The main content area is titled 'Training Request Form (TRS)' and contains two dropdown menus: 'Content Management (Database/Automation)' set to 'Content Management (Database/Automation)' and 'In Progress' set to 'In Progress'. Below these is a purple section titled 'Power Apps Checklist' with five items, each with a document icon, a toggle switch, and a status: 'IPRM Review' (checked, Complete), 'Specifications Attached' (unchecked, Pending), 'Uploaded to Gnosis' (unchecked, Pending), 'Planning Attached' (unchecked, Pending), and 'Changelog Attached' (unchecked, Pending), 'Testing Attached' (unchecked, Pending). A light blue section titled 'End of Project Deliverables' features a dropdown menu set to '5 items' and a list of items: '[Newletters]', '[Feedback]', '[Analytics]', '[Cross-Site Promotion]', and '[Email Announcements]'. At the bottom, a grey bar shows 'Created By: Raley-Barrett, Greg' and 'Created: 1/7/2021 4:01 PM'. A dark blue bar at the very bottom displays 'ID 192'. The browser's taskbar at the top shows various application icons and system tray icons.

EDM Project Details

CANCEL SAVE

General Details Checklist Tasks

Training Request Form (TRS)

Content Management (Database/Automation) In Progress

Power Apps Checklist

IPRM Review  Complete  Planning Attached  Pending  Testing Attached  Pending

Specifications Attached  Pending  Changelog Attached  Pending

Uploaded to Gnosis  Pending

End of Project Deliverables

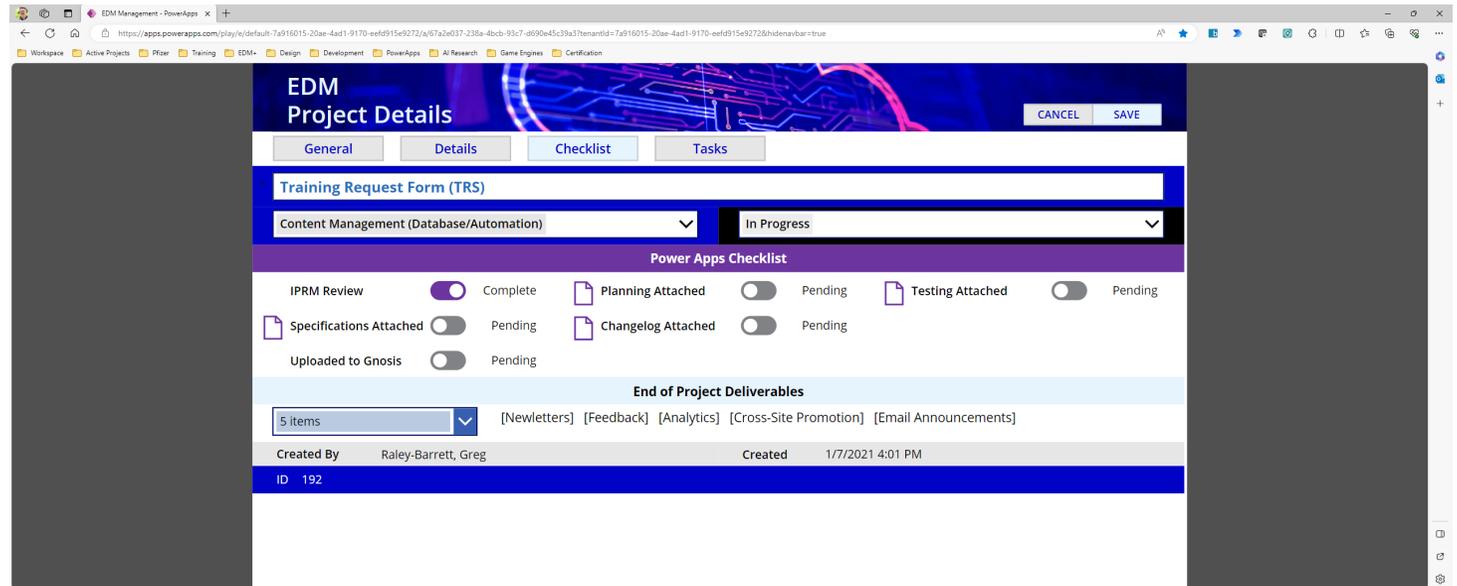
5 items [Newletters] [Feedback] [Analytics] [Cross-Site Promotion] [Email Announcements]

Created By Raley-Barrett, Greg Created 1/7/2021 4:01 PM

ID 192

# Project Details - Checklist

- Based on project types and details, a project checklist is dynamically generated to ensure compliance with company standards.



EDM Project Details

General Details Checklist Tasks

Training Request Form (TRS)

Content Management (Database/Automation) In Progress

Power Apps Checklist

IPRM Review	<input checked="" type="checkbox"/>	Complete	Planning Attached	<input type="checkbox"/>	Pending	Testing Attached	<input type="checkbox"/>	Pending
Specifications Attached	<input type="checkbox"/>	Pending	Changelog Attached	<input type="checkbox"/>	Pending			
Uploaded to Gnosis	<input type="checkbox"/>	Pending						

End of Project Deliverables

5 items [Newletters] [Feedback] [Analytics] [Cross-Site Promotion] [Email Announcements]

Created By Raley-Barrett, Greg Created 1/7/2021 4:01 PM

ID 192

# Project Details - Tasks

EDM Management - PowerApps x +

https://apps.powerapps.com/play/e/default-7a916015-20ae-4ad1-9170-eefd915e9272/a/67a2e037-238a-4bcb-93c7-d690e45c39a3?tenantId=7a916015-20ae-4ad1-9170-eefd915e9272&hiddenavbar=true

Workspace Active Projects Pfizer Training EDM+ Design Development PowerApps AI Research Game Engines Certification

## EDM Project Details

CANCEL SAVE

General Details Checklist **Tasks**

### Training Request Form (TRS)

Content Management (Database/Automation) In Progress

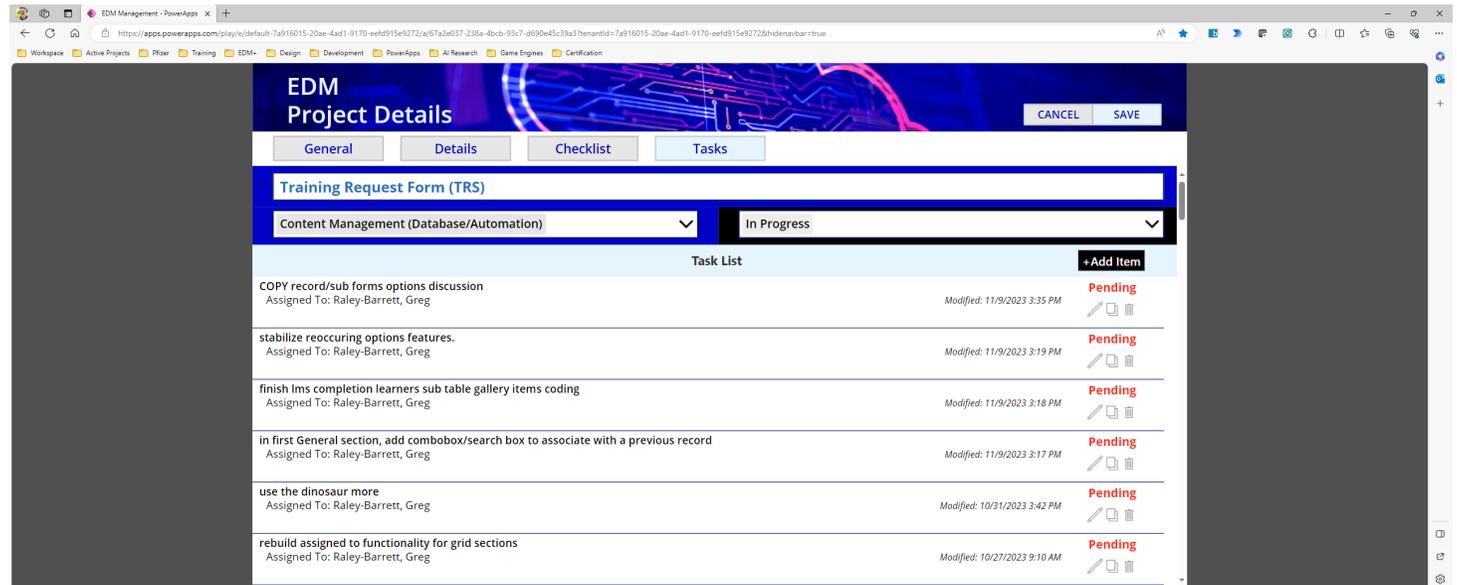
#### Task List

+Add Item

COPY record/sub forms options discussion Assigned To: Raley-Barrett, Greg	Modified: 11/9/2023 3:35 PM	Pending
stabilize reoccurring options features. Assigned To: Raley-Barrett, Greg	Modified: 11/9/2023 3:19 PM	Pending
finish lms completion learners sub table gallery items coding Assigned To: Raley-Barrett, Greg	Modified: 11/9/2023 3:18 PM	Pending
in first General section, add combobox/search box to associate with a previous record Assigned To: Raley-Barrett, Greg	Modified: 11/9/2023 3:17 PM	Pending
use the dinosaur more Assigned To: Raley-Barrett, Greg	Modified: 10/31/2023 3:42 PM	Pending
rebuild assigned to functionality for grid sections Assigned To: Raley-Barrett, Greg	Modified: 10/27/2023 9:10 AM	Pending

# Project Details - Tasks

- Each project list is linked to a sub table to manage and track tasks.
- New tasks can be added and managed.
- A copy button is available to duplicate tasks when needed.



The screenshot displays the 'EDM Project Details' page in a web browser. The page is titled 'EDM Project Details' and has a 'CANCEL' and 'SAVE' button in the top right corner. Below the title, there are tabs for 'General', 'Details', 'Checklist', and 'Tasks'. The 'Tasks' tab is selected, showing a 'Task List' for the 'Training Request Form (TRS)' project. The task list is filtered by 'Content Management (Database/Automation)' and 'In Progress'. The task list contains six tasks, each with a description, assigned to 'Raley-Barrett, Greg', and marked as 'Pending'. Each task has a 'Copy' icon and a 'Delete' icon. The tasks are:

Task Description	Assigned To	Modified	Status	Actions
COPY record/sub forms options discussion	Raley-Barrett, Greg	11/9/2023 3:35 PM	Pending	Copy, Delete
stabilize reoccurring options features.	Raley-Barrett, Greg	11/9/2023 3:19 PM	Pending	Copy, Delete
finish lms completion learners sub table gallery items coding	Raley-Barrett, Greg	11/9/2023 3:18 PM	Pending	Copy, Delete
in first General section, add combobox/search box to associate with a previous record	Raley-Barrett, Greg	11/9/2023 3:17 PM	Pending	Copy, Delete
use the dinosaur more	Raley-Barrett, Greg	10/31/2023 3:42 PM	Pending	Copy, Delete
rebuild assigned to functionality for grid sections	Raley-Barrett, Greg	10/27/2023 9:10 AM	Pending	Copy, Delete

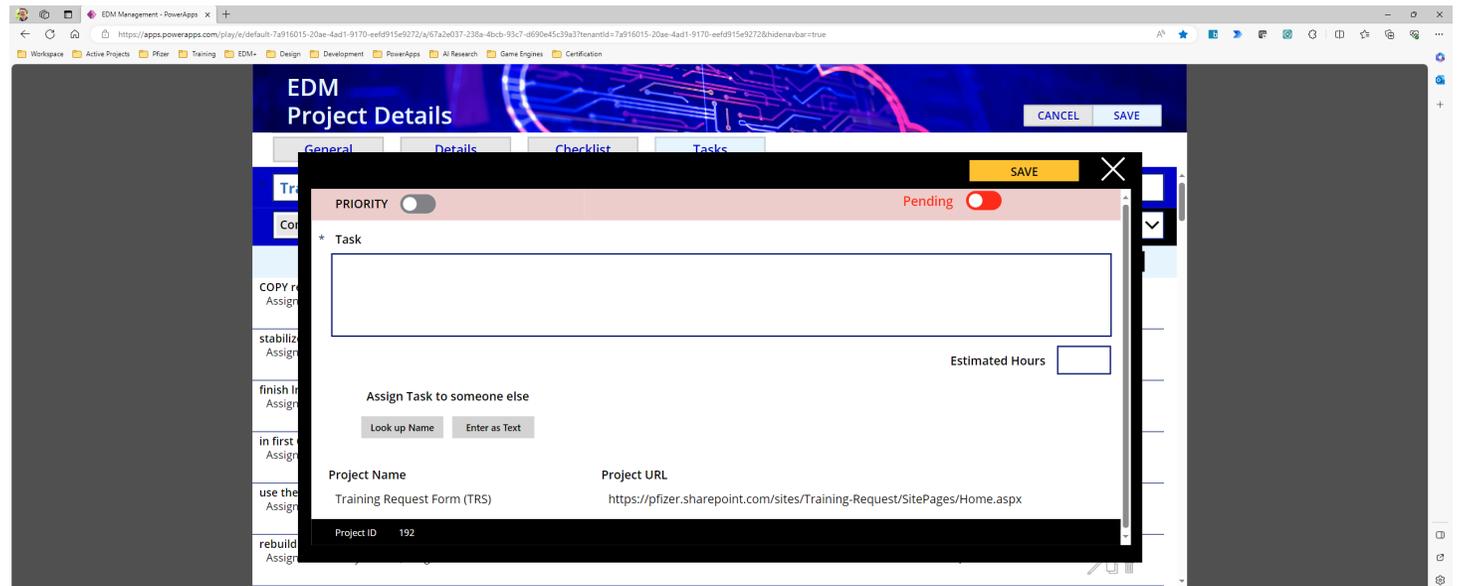
# Tasks

The screenshot shows a web browser window displaying the 'EDM Project Details' form. The browser's address bar shows the URL: <https://apps.powerapps.com/play/e/default-7a916015-20ae-4ad1-9170-eefd915e9272/a/67a2e037-238a-4bc9-93c7-d690e45c39a3?tenantId=7a916015-20ae-4ad1-9170-eefd915e9272&hiddenavbar=true>. The browser's tab is labeled 'EDM Management - PowerApps'. The page header includes 'EDM Project Details' and 'CANCEL SAVE' buttons. Below the header are tabs for 'General', 'Details', 'Checklist', and 'Tasks'. A modal window is open over the 'Tasks' tab, featuring a 'SAVE' button and a 'Pending' toggle switch. The modal contains a form with the following fields and options:

- PRIORITY**: A toggle switch.
- Pending**: A red toggle switch.
- \* Task**: A large text input field.
- Estimated Hours**: A text input field.
- Assign Task to someone else**: A section with 'Look up Name' and 'Enter as Text' buttons.
- Project Name**: Training Request Form (TRS)
- Project URL**: <https://pfizer.sharepoint.com/sites/Training-Request/SitePages/Home.aspx>
- Project ID**: 192

# Tasks

- Tasks can be marked as priority. This will highlight the task and move them to the top of any lists that they are displayed on.
- Tasks are automatically assigned to the person who created the task, but they can be assigned to anyone within the organization.
- A text box is available for assigning teams or contractors.



# Task List by Project

The screenshot displays a web application interface for 'EDM Task List'. At the top, there is a navigation bar with a search bar labeled 'Search Task' and a 'Reset List' button. To the right, there are 'View by' filters for 'Status', 'Type', and 'Dev'. Below the navigation bar, a list of tasks is shown, each with a chevron icon on the left and 'Total Est Hours' on the right. The tasks are:

- Protocol Assessment Reduction (PAR) Tool Development (11) - Total Est Hours: 12
- R&D Integration Hub (1) - Total Est Hours: 1
- Research RISE (2) - Total Est Hours: 4
- Research Unity (2) - Total Est Hours: 7
- Research Unreal (1) - Total Est Hours: 1
- RPS Resource Center (1) - Total Est Hours: 1
- SPA Communication Request Form (1) - Total Est Hours: 1
- Training Planner (1) - Total Est Hours: 1
- Training Request Form (TRS) (15) - Total Est Hours: 28

Below the list, four detailed task entries are visible, each with a 'LINK' button and a chevron icon:

- Training Request Form (TRS)**  
Task: create dashboard views for: SUBMITTER, ALL USERS, TRIAGER, PROCESSORS, WUHAN, CM LMS TA, CHINA SUBMISSIONS, & URGENT REQUESTS  
Est Hours: 6  
Modified: 3/1/2023 10:55 AM
- Training Request Form (TRS)**  
Task: ADMIN: Add pop up warning if closing a record and not all tasks are complete  
Est Hours: 2  
Modified: 3/30/2023 3:27 PM
- Training Request Form (TRS)**  
Task: Processing Time Formula | total time = (task timeX + task timeY + task timeZ) + triager time  
Est Hours: 1  
Modified: 5/23/2023 4:30 PM
- Training Request Form (TRS)**  
Task: ADD | Do you want the CM team to input LMS data in the associated TES?  
Est Hours: 1  
Modified: 8/8/2023 4:17 PM

At the bottom of the interface, there is a 'PRIORITY' button and a 'Power Apps Version 0307.1' footer.

# Task List by Project

- The Task List view groups tasks by the projects that they are associated with.
- A running total of estimated hours is included on the dashboard.
- The task list can also be grouped by status, type, or developer assigned.
- A priority button is included to display all tasks marked as top priority.

The screenshot shows a web application titled "EDM Task List". The interface includes a search bar, a "Reset List" button, and filters for "Status", "Type", and "Dev". The main content area displays a list of tasks grouped by project, with a "Total Est Hours" column. The tasks are as follows:

Project	Total Est Hours
Protocol Assessment Reduction (PAR) Tool Development (11)	12
R&D Integration Hub (1)	1
Research RISE (2)	4
Research Unity (2)	7
Research Unreal (1)	1
RPS Resource Center (1)	1
SPA Communication Request Form (1)	1
Training Planner (1)	1
Training Request Form (TRS) (15)	28

The "Training Request Form (TRS)" section is expanded, showing individual tasks with their estimated hours and modification dates:

Task	Est Hours	Modified
Task: create dashboard views for: SUBMITTER, ALL USERS, TRIAGER, PROCESSORS, WUHAN, CM LMS TA, CHINA SUBMISSIONS, & URGENT REQUESTS	6	3/1/2023 10:55 AM
Task: ADMIN: Add pop up warning if closing a record and not all tasks are complete	2	3/30/2023 3:27 PM
Task: Processing Time Formula   total time = (task timeX + task timeY + task timeZ) + triager time	1	5/23/2023 4:30 PM
Task: ADD I Do you want the CM team to input LMS data in the associated TES?	1	6/8/2018 11:49 AM

At the bottom of the interface, there is a "PRIORITY" button and a "Power Apps Version 0307.1" footer.

# Task List - Priority

The screenshot shows a Power Apps interface for an 'EDM Task List'. The interface includes a navigation bar with filters for 'Pending', 'Completed', and 'Developer'. A 'View by' section allows filtering by 'Status', 'Type', or 'Dev'. The main content area displays a list of tasks with the following details:

PRIORITY	Total Est Hours: 8
<b>OTTO - Track It!</b> PRIORITY: create automation to export data daily to gridexport spreadsheet	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Approved Exceptions Automation Process</b> PRIORITY: add indicator to Processor list to show if REMOVE has been 'actioned'	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: Determine and implement how to prevent a submitter from submitting their form a without an attachment and a number of records being entered. If a number has been entered, the attachments card must not be blank.	Est Hours: 2 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: Wherever the VYTIS Assessment has been flagged as being inaccurate, we want to add a due date (submit date+7 days) to each of these emails update time stamps based on date confirmor sends response - new message needs to be generated	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: troubleshoot the qc'd by name population prematurely	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: troubleshoot when submitting from Info Needed status, not consistently going back to submitted and locked.	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates (PENDING VYTIS status)</b> PRIORITY: Manager notification flag troubleshooting	Est Hours: 1 <a href="#">LINK</a>

At the bottom right of the interface, it says 'Power Apps Version 0307.1'.

# Task List - Priority

- The priority task list is useful in managing workloads and creating priority tasks.
- A link is included to open the project location.
- The arrow button opens the task details for updating ownership, notes, or status.

The screenshot displays a Power Apps interface titled "EDM Task List". The interface includes a navigation bar with "Pending", "Completed", and "Developer" filters, and a "View by" section with "Status", "Type", and "Dev" options. A red header bar indicates "Total Est Hours: 8". The main content area lists several tasks, each with a title, a brief description, estimated hours, a "LINK" button, and a right-pointing arrow button.

PRIORITY	Total Est Hours: 8
<b>OTTO - Track It!</b> PRIORITY: create automation to export data daily to gridexport spreadsheet	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Approved Exceptions Automation Process</b> PRIORITY: add indicator to Processor list to show if REMOVE has been 'actioned'	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: Determine and implement how to prevent a submitter from submitting their form a without an attachment and a number of records being entered. If a number has been entered, the attachments card must not be blank.	Est Hours: 2 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: Wherever the VYTIS Assessment has been flagged as being inaccurate, we want to add a due date (submit date+7 days) to each of these emails update time stamps based on date confirmor sends response - new message needs to be generated	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: troubleshoot the qc'd by name population prematurely	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates</b> PRIORITY: troubleshoot when submitting from Info Needed status, not consistently going back to submitted and locked.	Est Hours: 1 <a href="#">LINK</a>
<b>YRR Certification Updates (PENDING VYTIS status)</b> PRIORITY: Manager notification flag troubleshooting	Est Hours: 1 <a href="#">LINK</a>

Power Apps Version 0307.1

# Summary

**EDM Project List**

Search Project or Site Contact

+ Add New  
Reset List

View by: Type, Dev, Task

> New Request (6)

✓ In Progress (10)

<b>*EDM Housekeeping Tasks</b> Type: Updates & Maintenance	Requested Completion Date: Ongoing	Lead Dev: Raley-Barrett, Greg	Contact: Warters, Martin	LINK	➔
<b>EDM Developer Asset Library (B1 Goal)</b> Type: Multimedia (Audio, Video, Animation)	Requested Completion Date: S2	Lead Dev: Raley-Barrett, Greg	Contact: Juaniza, Napoleon	LINK	➔
<b>GSSO Reels</b> Type: Multimedia (Audio, Video, Animation)	Requested Completion Date:	Lead Dev: Raley-Barrett, Greg	Contact: Iverson, Summer	LINK	➔
<b>OTTO - Track It!</b> Type: Content Management (Database/Automation)	Requested Completion Date: S2 2023	Lead Dev: Raley-Barrett, Greg	Contact: Fetter, Lisa	LINK	➔
<b>PCRU CMCD and Training Request Manager</b> Type: Content Management (Database/Automation)	Requested Completion Date: S2 2023	Lead Dev: Raley-Barrett, Greg	Contact: Spader, Erich	LINK	➔
<b>PCRU PCM Initiation Process</b> Type: Content Management (Database/Automation)	Requested Completion Date:	Lead Dev: Raley-Barrett, Greg	Contact: Spader, Erich	LINK	➔
<b>Protocol Assessment Reduction (PAR) Tool Development</b> Type: Content Management (Database/Automation)	Requested Completion Date:	Lead Dev: Raley-Barrett, Greg	Contact: Basra, Mandeep	LINK	➔
<b>QMS GCP Critical Thinking</b> Type: Multimedia (Audio, Video, Animation)	Requested Completion Date:	Lead Dev: Raley-Barrett, Greg	Contact: Warters, Martin	LINK	➔
<b>QMS01/QMS04 Highlight Reel</b> Type: Multimedia (Audio, Video, Animation)	Requested Completion Date: End of Year	Lead Dev: Raley-Barrett, Greg	Contact: White, Amber	LINK	➔
<b>Training Request Form (TRS)</b> Type: Content Management	Requested Completion Date: S2 2023	Lead Dev: Raley-Barrett, Greg	Contact: Laxman, Michele	LINK	➔

Complexity Rating: High (red), Medium (orange), Low (green)

Power Apps Version 0307.1

# Summary

The screenshot displays the 'EDM Project List' interface. At the top, there is a search bar labeled 'Search Project or Site Contact' and buttons for '+ Add New', 'Reset List', and 'View by' (with options for Type, Dev, Task). Below the search bar, the list is categorized into 'New Request (6)' and 'In Progress (10)'. The 'In Progress' section contains a table of project requests:

Project Name	Type	Requested Completion Date	Lead Dev	Contact	Actions
*EDM Housekeeping Tasks	Updates & Maintenance	Ongoing	Raley-Barrett, Greg	Warters, Martin	LINK
EDM Developer Asset Library (B1 Goal)	Multimedia (Audio, Video, Animation)	S2	Raley-Barrett, Greg	Juaniza, Napoleon	LINK
GSSO Reels	Multimedia (Audio, Video, Animation)		Raley-Barrett, Greg	Iverson, Summer	LINK
OTTO - Track It!	Content Management (Database/Automation)	S2 2023	Raley-Barrett, Greg	Fetter, Lisa	LINK
PCRU CMCD and Training Request Manager	Content Management (Database/Automation)	S2 2023	Raley-Barrett, Greg	Spader, Erich	LINK
PCRU PCM Initiation Process	Content Management (Database/Automation)		Raley-Barrett, Greg	Spader, Erich	LINK
Protocol Assessment Reduction (PAR) Tool Development	Content Management (Database/Automation)		Raley-Barrett, Greg	Basra, Mandeeep	LINK
QMS GCP Critical Thinking	Multimedia (Audio, Video, Animation)		Raley-Barrett, Greg	Warters, Martin	LINK
QMS01/QMS04 Highlight Reel	Multimedia (Audio, Video, Animation)	End of Year	Raley-Barrett, Greg	White, Amber	LINK
Training Request Form (TRS)	Content Management		Raley-Barrett, Greg	Leopold, Michele	LINK

At the bottom of the interface, there is a complexity rating legend: High (red), Medium (orange), and Low (green). The footer indicates 'Power Apps Version 0307.1'.

- All items displayed on the EDM Project Tracker are stored in the SharePoint Lists on the site.
- These lists can be used to drive Power BI dashboards.
- The list can be exported as Excel spreadsheets for leadership reports and updates.

# Questions

