Accolade Collaborative Workflow Quick Reference

 Displays recently accessed items.   Displays Help content for the current page.

Step 1: Document Review

Action 1: Marketing Review → Action 2: Financial Review

Step 2: Generate PDF

Action 1: Document Complete → Action 2: Create PDF → Action 3: Publish PDF

Complete Deliverable
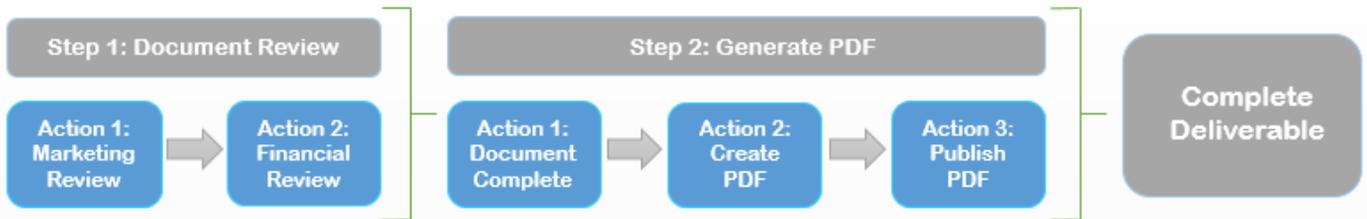
Workflows contain steps and actions help to complete deliverables and activities.

Viewing and Completing Your Workflow Actions

Project

Charts & Reports
My Gates
Gate Line-up
Workflow Line-up
My Projects >
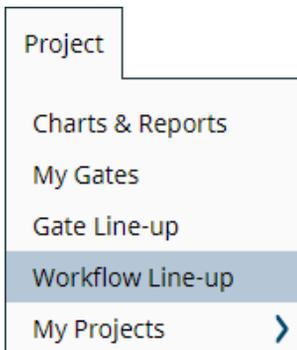
View and complete the active workflow actions assigned to you in two places.

- Workflow Line-up page
- Individual deliverable or activity

Access individual workflows on deliverables or activities from the Content Tree

 More Details
 Integrated Product Definition (Stage 1)
▶ Versions
 Activities
 Related Documents
 Workflow - Completed
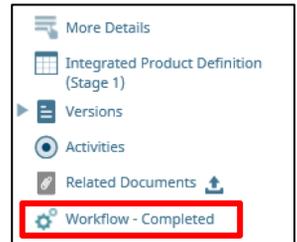
Workflow Line-up Decision Types

Complete workflow actions and enter decisions that determine the progression of deliverables and activities in the stage-gate process.

 Select a decision for the workflow action, moving the deliverable forward or keeping it stagnant.

 Approves the deliverable.

 Rejects the deliverable.

 Skips a workflow action.

 Declines the request to review the deliverable or document.

Managing Workflows in Projects

Starting Workflows

1. Navigate to the project deliverable or activity containing the workflow.
2. In the Contents tree, click the workflow and click **Start Workflow.**

Stopping Workflows

1. Display the project and stages page and identify the deliverable or activity that contains the workflow.
2. In the Contents tree, click the workflow to display its details and click **Stop Workflow** in the bottom right corner.

   When a workflow concludes successfully, it stops automatically.

Adding Workflows to Deliverables and Activities

1. Display the project and stages page, and identify the deliverable or activity to add the workflow to.
2. In the Contents tree, click **More Details** and click in the **Workflow** field.
3. Select an available workflow and click **Set Workflow**.
4. Click **Apply** to save your changes.

Skipping Workflow Actions

Only actions defined as being able to skip within the workflow definition can be skipped. Skip from two locations.

- Workflow Line-Up Page

  Click to skip the action and **Apply** to save your changes.

- On the Deliverable or Activity

  In the Contents tree, click the workflow and click **Skip** in the appropriate action row.

Workflow Action Ownership

Assign or delegate workflow actions to users by updating the workflow action owner.

1. Navigate to the workflow action you want to delegate on either the project or the Workflow Line-up page.
2. Click the user name in the **Owner** column and select the user to make the new workflow action owner.
3. Click **OK** or **Set User**, and **Apply** to save your changes.

Sopheon