

# Accolade Planning and Roadmapping Quick Reference

## Navigating Accolade Planning and Roadmapping



### Accessing Planning and Roadmapping Components



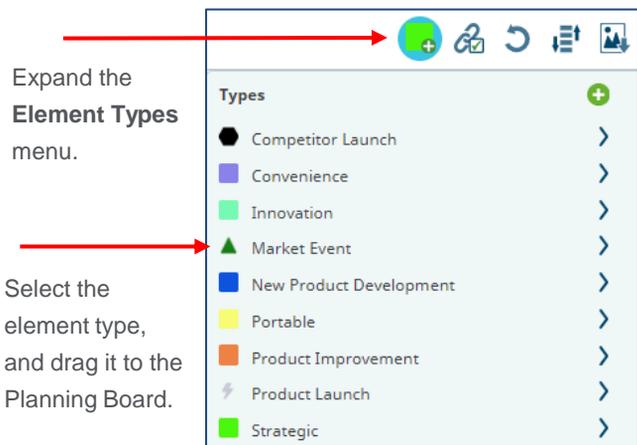
The Canvas view displays by default. Use the following options to access the different planning and roadmapping components.

- Expand to select or create a different view type.
- Expand to select or create a different element type.
- Click to display relationships in the current view.
- Sort elements alphabetically in the Canvas view.
- Download an image of the current view.

## Working with Planning Elements

### Adding Planning Elements

Required: Planner + Process Manager with Add Project rights



Expand the Element Types menu.

Select the element type, and drag it to the Planning Board.

	Additional Roles and Rights Required
<b>Details</b>	Process Manager with Manage Process; or the assigned Project Manager
<b>Metrics</b>	Process Manager with Manage Process; or the assigned Project Manager
<b>Team</b>	Process Manager with Manage Team; or the assigned Project Manager
<b>Security</b>	Process Manager with Manage Process
<b>Links</b>	View only to all Planners with element access

### Navigational Components That Are Always Available

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

Additional actions:

- Access your user profile
- Set the current page as your Home
- Log out of the system
- View the Accolade version

**Search** - Enter text to search for projects and documents.

**Menu** - Access main level pages. Some menus may link to outside pages.



### Viewing and Editing Element Details and Information

Hover over the element and click to view or edit the following details:

- Enter the element's details or metric values.
- Change the project thumbnail image.
- Add or remove team members.
- Configure phase information.
- Display project relationships or dependencies.
- Set planning element security.
- Delete the element.

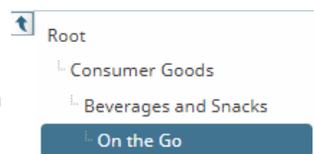


Hover over the element and click the following for additional options:

- Click to display the project description and selected metric values.
- Click to pin the element details to the view.
- Click to display or modify the current project relationship links.
- Click to display the Time View for the project.
- Click to display the hierarchy of related projects.
- Click to display the related child projects.

### Moving Up the Hierarchy

1. Click at the top of the Planning Board. The last item in the tree is the currently displayed board.
2. Select a level in the tree to navigate to that board



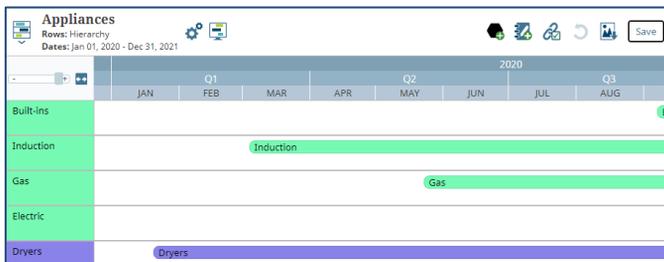
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## Working with Planning Views

### Options Available in Both Grid and Gantt Views

-  - Set display settings for the view.
-  - Refine which elements are included in the view. Available on select fields.
-  - Create annotations and notes in views.
-  - Save a view with the current settings.

## Managing Gantt Views



### Changing Element Metric Values or Dates in the Gantt

- If the vertical axis is a list metric, drag and drop an element to a different swim lane to update the metric value.
- Hover over the left or right end of an element until the cursor changes to . Click and drag the end to a new date.
- Drag and drop an element to a new location.
- Hover over the element and click  to change the metrics or dates in the element details.

### Changing the Scale of the Gantt View

Use the slide bar to select the zoom level to display the time intervals closer or farther apart. Click  to adjust the displayed view to fit the maximum horizontal screen width.

## Managing Grid Views

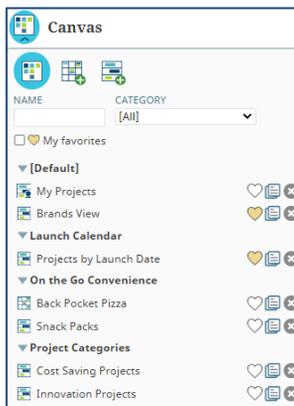


### Changing Element Metric Values or Dates in the Grid

- If an axis is a metric or a date, drag and drop an element to a cell in the grid to update its value.
- If an axis is a metric or a date, drag and drop the element to a cell in the grid to update its values in the element details.
- Hover over the element and click  to change the metrics or dates in the element details.

### Configuring Time Frames for Date Grids

1. Click  to open the Edit Planning Grid Settings dialog.
2. Click  next to the axis field you want to change.
3. Select the period and quantity of that period to display.
4. Enter the starting date and click **OK**.



-  Composite view
-  Shared/public view
-  Scenario view
-  Copy a saved view
-  Delete a saved view

### Displaying Gantt's View in Presentation Mode

Click  to display the view without the navigation and Accolade menu and title bars.

### Applying Element Legends to Planning Views

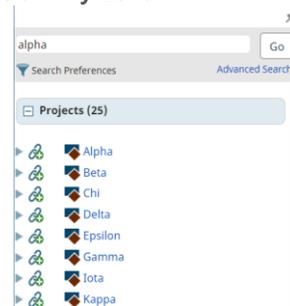
1. Click  to access the view's display settings.
2. In the **Border** and/or **Fill** fields, select a metric defined with colors to apply a legend to the view.
3. (*Optional*) In the Show Legends section, select the **Border** and/or **Fill** check boxes to include interactive legend(s) within the view.

Elements are shaded or border colors added based on their setting for the metric.

## Creating and Displaying Relationships

### Creating Links Between Elements at Any Level

1. Display the Planning Board.
2. Enter text in the Quick Search in the title bar.
3. Click  next to the project and drag the line to another project in the search results, or to an element displayed in the Planning Board.



### Creating Links Between Elements in the Same Board

1. Click  and select **Create**.
2. Click and hold on an element until the cursor changes to .
2. Drag the line to the related element.
3. Select the relationship type and click **OK**.

### Displaying Links Between Elements

1. Click  and select **Manage** to open the dialog in any view.
2. Select **Show all lines, elements, and levels** to view all relationships, or select specific elements, relationships, and/or hierarchy levels to view.
3. If necessary, review and resolve any relationships conflicts.
4. Customize how the relationship lines are displayed, and to add a line legend to the view.
5. Click **OK** to view the relationships.