Accolade Project Participation Quick Reference

Navigating Accolade

ACCOLADE | Workspace | System | Resource | Idea | Planning | Dashboards | VOL Global Links | **New Project** | (?) | Search...

Using Navigational Components

- **Recent Items** – Display recently accessed items
- **Help** – Access help content for the current page
- **Search** – Enter text to search for projects and files
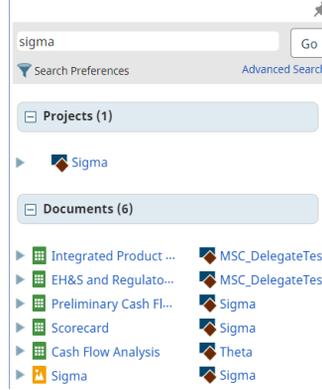 **Menu** – Access main level pages
- **Additional actions:**
  - **My Profile** – Access your user profile
  - **Set as Home** – Make the current page your home page
  - **About** – Display the current version of Accolade
  - **Environment** – Show detailed information about Accolade
  - **Logout** – Exit Accolade

Jane User

My Profile
Set as Home
About
Environment
Logout

Personalizing Accolade Page Views

- **Lock/unlock stage** to prevent/make changes
- **Print** documents, lists, and reports
- **Filter** based on selected options specific to the page
- **Edit contents** to choose what columns display
- **Save** the current view configuration to display as your default view for the page

Searching for Projects & Documents with Quick Search

sigma | Go
Search Preferences | Advanced Search

☐ **Projects (1)**
▶ 🔷 Sigma

☐ **Documents (6)**
▶ Integrated Product ... | 🔷 MSC_DelegateTes
▶ EH&S and Regulato... | 🔷 MSC_DelegateTes
▶ Preliminary Cash Fl... | 🔷 Sigma
▶ Scorecard | 🔷 Sigma
▶ Cash Flow Analysis | 🔷 Theta
▶ 🔷 Sigma | 🔷 Sigma

Enter text in the **search** box in the upper right.
Click 🔍 or press **Enter**.
- 📌 Docks the panel so it remains open
- 🔻 Displays search preferences

Use **operators in search**:

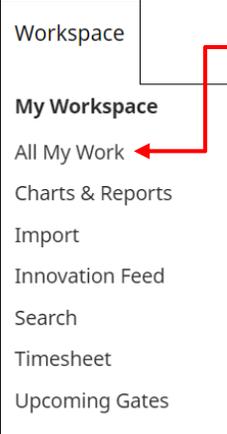|	
AND	Matches all words
OR	Matches either word
NOT	Matches the first word, but not the second
""	Matches exact phrase
+	Removes inflectional forms of the search word
*	Matches all words beginning with the letters prior to *****

💬 Communicating with Others

- ✉️ Send an email to Accolade users
- 💬 Start a meeting with Accolade users

Managing Projects in Accolade

Workspace

My Workspace
All My Work
Charts & Reports
Import
Innovation Feed
Search
Timesheet
Upcoming Gates

All My Work – Access **Projects, Deliverables** and **Activities** that you are involved in as the project manager or as a team member. Click the **Project name** to display the project.

Updating Project Details

1. Click 📊 to edit, copy, or update as needed.
2. Click ⊟ to create links between related projects.
3. Click 🏠 and click **Add New Status** to enter the project status. Click **Apply**.

   Note: Status notes are permanent and cannot be deleted.

Assigning Deliverables to the Team

1. Click 👥 to add project team members.

   Assigning function owners will automatically assign deliverables and activities to the appropriate team member.
2. Click ☑️ to display the stages of the project.
3. In the **Owner** column, select a team member. Click **Apply** to save your changes.

Setting Project Gate Dates

1. Click 🔷 to display the details of the gate.
2. Edit gate dates below the gate names in the process graphic or in the gate details.

Recording Gate Decisions

1. Ensure all documents required for the gate are complete and attached.
2. Click 🔷 and record the gate decision. Click **Apply** to save changes.

🏠 **Project Home**

🏠 SEL Project Home Required Metric

📋 Stages

🔷 Gates

📋 Metrics

👥 Team

📎 Related Docs

⊟ Related Projects

🏛️ Portfolio

💬 Discussions

🏛️ Resources

✳️ Portfolio Browser

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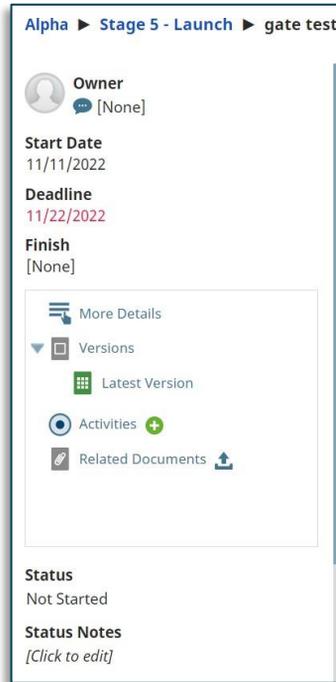## Completing Project Assignments

Menu > Workspace > All My Work

To access Project Deliverables and Activities assigned to you, navigate to **All My Work**.

Click the **assignment name** to display its details.

Downloading Templates and Versions

1. From the project Stages page or deliverable/activity details, click the desired template or version to start the download.
2. From the 🖼 Card View, click the ⬇ icon to download the template.
3. From the 🗒 Table View, hover over the icon next to the template you wish to download. Click to download.

Note: Icons identify the file type, such as Document, Spreadsheet, or Presentation.

Starting Deliverables and Activities

1. From **All My Work**, click the deliverable or activity name to display its details.
2. Set the status as necessary to indicate you are working on the deliverable/activity.
3. In the Contents tree in the deliverable/activity details:

Alpha ▶ Stage 5 - Launch ▶ gate test

Owner
💬 [None]

Start Date
11/11/2022

Deadline
11/22/2022

Finish
[None]

📋 More Details
▼ ☐ Versions
  ▦ Latest Version
◉ Activities ➕
🔗 Related Documents ⬆

Status
Not Started

Status Notes
[Click to edit]

- **To create a version using a template** - Expand **Versions** and click **Template**.
- **To create a version based on the latest version** – Expand **Versions** and click **Latest Version** to download the latest version for use as a base for the new version.
- **To create a version based on another version** – Click **Versions**. In the table, click the name of the version to download.
- **To complete information in a quick grid** - Click to enter info and click **Apply**.
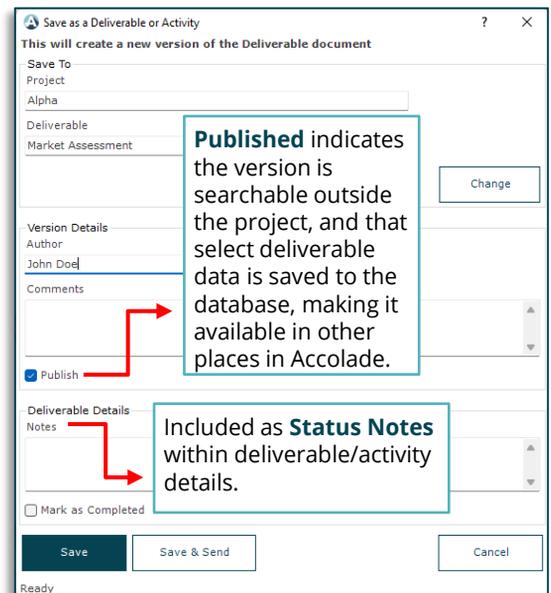
Adding Related Documents to Deliverables & Activities

1. In the Contents tree in the deliverable/activity details, click **Related Documents** and attach the file:

   🔼- Select the file to upload and store in Accolade. You can also drag and drop a file to the Related Documents pane.

   🔗- Link to a file on the network or to a web site URL.

   🔽- Associate an existing related document.

2. In the table, enter a category and description to identify the attachment.

The document is added to the deliverable/activity and to the project. To add related documents at the project level, click 📎 in the project menu to access the Related Docs page and add documents.

Saving/Uploading Deliverables

Save as a Deliverable or Activity ? ✕
This will create a new version of the Deliverable document
Save To
Project
Alpha

Deliverable
Market Assessment   [Change]

Version Details
Author
John Doe

Comments

☑ Publish

Deliverable Details
Notes

☐ Mark as Completed

[Save] [Save & Send]   [Cancel]
Ready

Published indicates the version is searchable outside the project, and that select deliverable data is saved to the database, making it available in other places in Accolade.

Included as **Status Notes** within deliverable/activity details.

Sharing Deliverables

- **From Deliverable/Activity details** – Display the assignment and click 💬 in the upper right corner. Choose ✉ **email**.
- **From Microsoft Office** – Select **File > Save to Accolade**, select the **Save as Deliverable/Activity**, enter details, and click **Save & Send** to generate an email to the project team (which can be edited before sending).

- **Drag and Drop to Accolade** - Display the deliverable/activity details and click **Versions**. Drag and drop the file from your desktop or Windows Explorer into the Versions pane.
- **With Accolade Office Extensions Add-In** - Select **Save to Accolade** from the Microsoft Office application's **File** menu.

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