Sopheon Accolade®

Innovation Planning and Roadmapping – Planning in Accolade Training Guide

Version: 15.2

About Sopheon Accolade®

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Contents

About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

Document	Contents
Sopheon Accolade What's New in This Release	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

In addition to the Accolade roles above, additional roles may be required to work with elements within a view. Additional roles are indicated throughout this module, as required.

Accolade Innovation Planning and Roadmapping Overview

Accolade Innovation Planning provides cross-functional planners the ability to create an overall corporate plan for innovation that includes all functional areas and integrates strategic corporate plans with the actual operational plans for projects. Individual plans are written using planning elements, which can be configured by color and style to allow planners to visually identify different types of plans and to easily assess the development of different aspects of an overall plan. Using metrics to track aspects of each plan enables you to report on the progress and success of each plan through integration with Accolade Portfolio Center.

Accolade Roadmapping, which includes all the functionality from Innovation Planning, provides the means to develop dynamic, interlinked long-range roadmaps for the innovations within your company. Roadmapping provides a visualization of the projects and their dependencies that make up the roadmap, to aid in aligning company strategies and investments to meet company objectives, and to coordinate efforts across teams for product launches at the correct time to market.

Innovation Planning is used throughout this Help system to refer to the components contained in both Innovation Planning and Roadmapping.

Portfolios and Innovation Planning

Within Innovation Planning, Planners can arrange elements in a hierarchy of parent-child relationships. Using a hierarchy allows Planners to create plans by modeling elements that are components of, or in some sense subordinate to, other elements. If your company has purchased Accolade Portfolio Center, you can use Portfolio Optimizer to manage the highest level element in the hierarchy. The first-level children of a planning element become that element's portfolio, and you can use Portfolio Optimizer to evaluate the portfolio with a variety of metrics, re-rank the elements in the portfolio, and create charts that show the relationships between the elements.

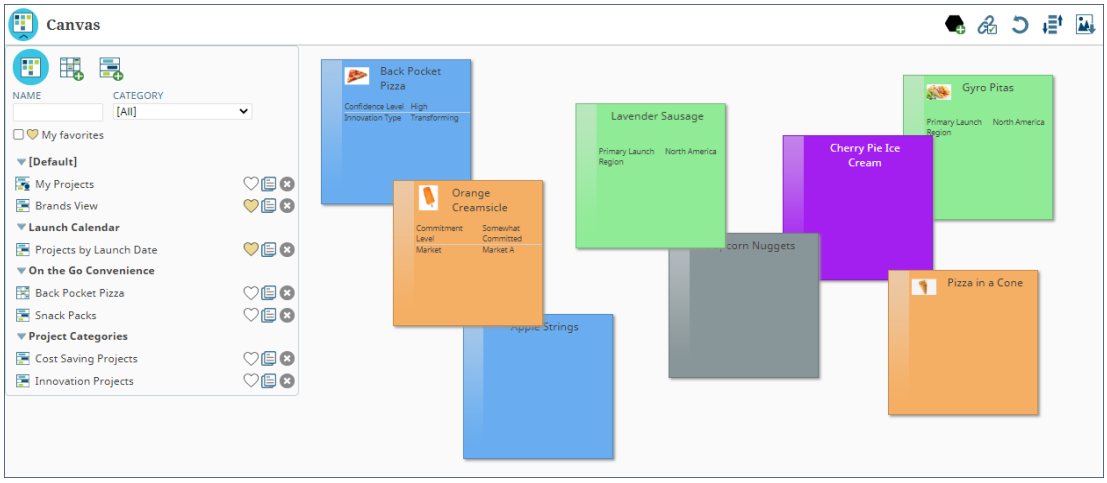
To open Portfolio Optimizer from Innovation Planning, from the parent element of the portfolio, navigate to the Portfolio page and select **Open Portfolio Optimizer**. The portfolio is named the same as parent planning element. For more information about using Portfolio Optimizer, see the Portfolio Optimizer online Help available within that application.

Innovation Planning Workspace

The Accolade Innovation Planning workspace is called the Planning Board and contains planning element types, elements, and views to represent your company's innovation strategies and initiatives.

Planning Elements and Types

Note: Defining planning element types and creating planning elements are covered in *Planning in Accolade*.



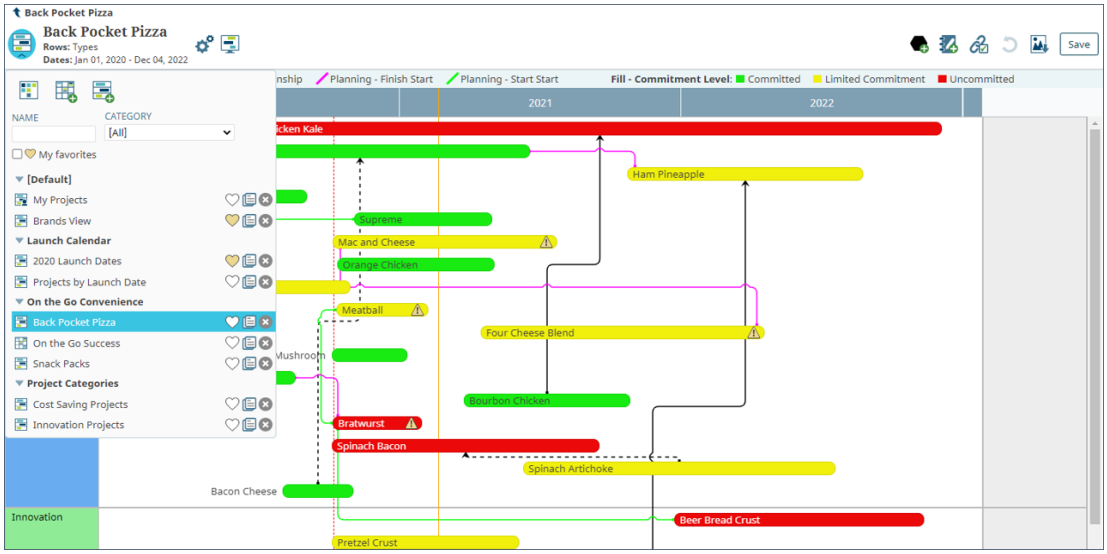
Individual plans and initiatives are written on planning elements that Planners drag-and-drop into any view within the Planning Board. To help organize planning elements and to speed up the creation of innovation plans, create and save element types that Planners can use once, or use as a template to create planning elements that contain the same basic information.

You must be assigned the Planner, Process Designer, and Process Manager roles with Manage Process and Add Project rights to create element types.

You can view the elements that make up your corporation's innovation plan using the Canvas, Grid, and Gantt view as described below. Elements have a "front" and a "back." The front of the element displays when you access each view. Each view offers different information about the element. Access the back of the element to view, enter, and modify additional details about the element. The back of an element is accessible in any view.

Planning Views

Note: Creating Grid and Gantt views, and working elements within all the views is covered in *Working with Planning Views*.



The Planning Board and contains different views in which you interact with and view planning elements, each of which displays elements and their data differently:

- **Canvas View** - The Canvas is the default or unstructured view. It initially displays all the planning elements at the top level of the element hierarchy, and Planners can navigate down and back up through each element's hierarchy. Location on the Canvas has no effect on the element's dates or metric values.
- **Grid View** - Grid views display the value of one or two specific metrics in the elements. The rows and columns of the grid are associated with metric values or with element types, and Planners can change metric values in an element by dragging it to a different row or column. Planners can create their own Grid views to compare elements in terms of the metrics they are interested in and navigate down and back up through each element's hierarchy.
- **Gantt View** - Gantt views, available with Accolade Roadmapping, display the elements in a timeline in respect to one another. The view can display many levels of the element hierarchies at the same time. Planners can change element dates or the values of a single metric by dragging elements and navigate down and back up through each element's hierarchy.
- **Child Board** - A child board displays any elements that are one level down in the element hierarchy from a given element. Planners can build the element hierarchy by adding elements to the child board of a parent element and then adding children to those elements and so on. Planners can navigate down to an element's child board and back up through an element's hierarchy.
- **Hierarchy Board** - The hierarchy board shows the current element and levels of its hierarchy below it. Planners can modify element details, metrics, and the project team in the hierarchy board, but cannot add more elements or modify the hierarchy itself on this board. Planners can view different parts of the hierarchy by dragging the hierarchy or the board, but cannot drag individual elements to a different place in the hierarchy.

- **Project Time View** - the Time View displays a single project in a Gantt chart, which can be used to view and manage a project using times, durations, and dates of all the work necessary to complete the project.

Access Within Innovation Planning and Roadmapping

To access Innovation Planning, an Accolade user must be assigned the Planner user role. Security rights and your assignments within each planning element determine what you can see and do with that element.

Note: You may be asked to select a location when you access Accolade. Your selection can restrict your access to projects and information to only those allowed to be viewed from that location. It is possible that you have access to information in one location that you do not have access to in another location. Restrictions are in place to ensure your company's intellectual property is not in danger based on the laws and regulations in various countries.

Accolade offers several layers of security that defines what users have access to see and do within the application. The Accolade security features also apply to Innovation Planning as outlined below:

- **Access Groups** - Access groups restrict what users can see in Innovation Planning and other locations within Accolade. Users can see elements that are assigned the same access group to which they are assigned. Rights within an access group also change how users can interact with elements within Innovation Planning. For example, only users who also have the Process Manager user role with Add Project rights can add planning elements to any view.
- **Security Lists** - Security lists further refine access to information in Innovation Planning and other locations within Accolade. A security list is a hierarchical list within a single category, such as location, that you can use to manage access to planning elements. A user and a planning element must be assigned to the same security list for the user to have access to view the element.
- **Security Profiles** - Security profiles are also used to further restrict access rights based on classes and security metrics. Element types in Innovation Planning are classes. Users assigned to the profile can view elements of the included class(es) that contain identical metric values. Planners can create elements of the types associated with the classes to which they are assigned.
- **Assignments** - Users are assigned to a planning element as a project manager or as a member of the project team. You can view planning elements, and in some cases edit element details, if you have the Planner user role and are assigned to the element as a member of the team.

The following rights and permissions are required within Innovation Planning:

Action	User Must Have These Roles and Rights
Access to Innovation Planning and Roadmapping	Planner. The Planner user role is required for any user to access Accolade Innovation Planning and Accolade Roadmapping. Without this role, the **Planning** menu option does not display.
Add planning elements to Canvas, Grid, or Gantt views	Planner and Process Manager with Add Project rights can add planning elements to any view. To add an element to the main planning board, you must have Add Project rights at the Root access group level. To add an element to a child board, you must have Add Project rights to the access group assigned to the parent element. In addition, if security lists are in use, you must have rights to the same security list values as the parent to add an element to a parent's child board. Access groups are assigned to the parent element in the element details in the Security section.
View planning elements within Canvas, Grid, or Gantt views	Planner with the appropriate security. You can see elements within planning if you are assigned the access group, security list, and your security profile rights match those assigned to an element. If the security information defined for an element does not match your user, you cannot see the element in any view.
Edit planning elements within Canvas, Grid, or Gantt views	Planner and element team members. Team members and the assigned project manager can edit aspects of an element such as metric values. Additional rights may be required. See the topics throughout this Help for more details. Process Managers with Manage Process rights also have editing capabilities for elements on the planning board.
Save public Grid and Gantt views	Planner and Planning View Designer. Planners can create and save views for their own use; however, the Planning View Designer user role is required to save views for other Planners.
Create categories to group views	Planner and Process Designer. The Process Designer user role is required to create categories in which you can save views.
Create or modify planning element types	Planner, Process Designer, and Process Manager with Add Project rights at the Root access group level.

Representing Your Business Landscape in Accolade

After you have defined your business landscape, how the components relate, and the metrics you plan to use to measure success, you can use the components of Accolade Innovation Planning and Accolade Roadmapping to represent that landscape.

To build the components within Accolade, do the following:

- Assign users who require access to the Planning Board the Planner user role. Additional roles may be required for users to complete tasks within the Planning Board. See "Access Within Innovation Planning and Roadmapping" on page 10.
- Create planning element types that represent aspects of your business. See "Planning Element Types Overview" on page 12.
- Add the planning elements that represent the individual initiatives and events that are part of your current strategy. See "Planning Elements Overview" on page 22.
- Arrange planning elements into parent/child hierarchies to model your strategy as components of, or in some sense subordinate to, other portions of the plan.
- Create links between planning elements to show dependencies and other relationships. See "Planning Element Relationships" on page 38

Planning Element Types Overview

Each planning element uses a single element type. Element types are groups or categories of planning initiatives that have common characteristics. Element types can represent any aspect of your business to group the initiative and events that are part of your innovation strategy. If you completed a brainstorming of all your initiatives and efforts as described in *Introduction to Planning* in this series, each color you used within the brainstorm session translates into a planning element type.

Note: Users with the Planner, Process Designer, and Process Manager (with Add Project rights) user roles with security access at the Root level can create planning element types. All user roles are required.

Elements can be set to either represent a date in time, or span a period of time:

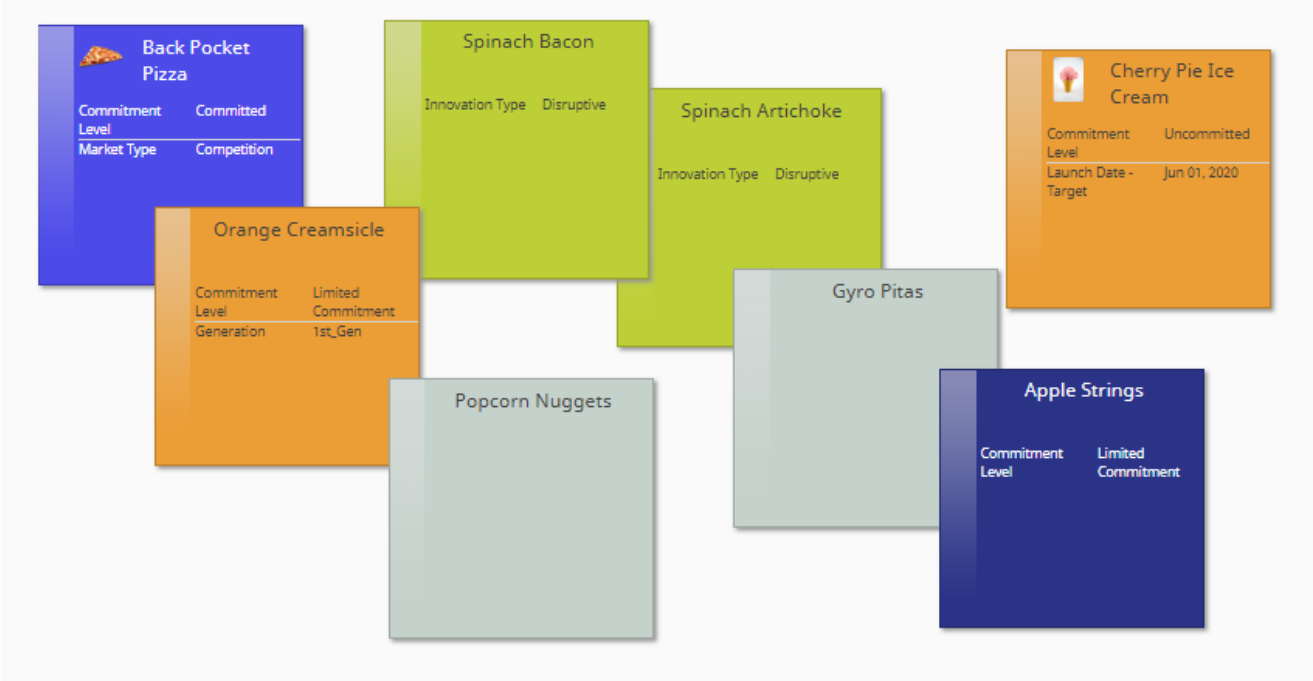
- **Event Element Types** - Use date element types to represent events such as launch dates, or market events such as trade shows or implementation deadlines. These elements contain a specific date that is based on the start date, end date, or a date that is established using a date metric, such as a Deadline date. Use these element types to chart events to determine if your products and initiatives line up to the represented events.
- **Span Element Types** - Use span element types to either group elements into categories, or to represent initiatives that take place across a period of time. Such as work on a new product or an internal initiative that relates to a product.

Each element type can contain:

- A color to identify the element type.
- A shape to help identify the element type.
- One or more metrics or matrices that the elements that use that type have in common. The metrics and matrices added to the element type are available to set on each individual element that is created using that type.

For example, consider the following element types:

- **Organizational** - An element that is used for organizational purposes to group products and concepts into smaller categories. Organizational elements are used to help define the hierarchy organizational structure of all the elements.
- **Strategic Area** - An element that groups initiatives into high-level focused areas for executives to have insight into how work meets the company's strategic goals.
- **Brand** - A further categorization of product areas within the organization that allows brand and portfolio managers to view their particular areas.
- **Product** - Products that we either currently produce, are actively working to bring to market, or are part of our longer term strategy.
- **Product Concept** - Ideas that are being vetted for future efforts.
- **Market Trend** - Used to highlight trends that are happening in the market place.
- **Market Event** - Dates of events that are happening in the market, for example government deadlines.
- **Market Need** - Much like an event, needs within the market that are on the horizon.
- **Technology** - Technologies, skills, or innovations being developed within your company that are enabling product creation.



Components Created for Planning Element Types

As you create element types, corresponding components are also created within Accolade.

- **Active Non-Gated Class** - Accolade adds a non-gated class with the **Show** and **Create** options selected. If you need to remove an element type from Innovation Planning, either clear the **Create** check box, deactivate the class, or delete the class from Accolade. Elements created using the type are not deleted.
- **Non-Gated Model** - A non-gated model that uses the class created.

If Innovation Planning is enabled, a default class and model (both named **[Innovation Planner Default]**) are included in Accolade.

Administrators and Process Designers can also create classes that add element types to Innovation Planning. For example, for element types that represent projects, a gated model might be more appropriate so a project is created where the project management flow and activities can be tracked and updated using Accolade.

In the class configuration, include the following Planning settings:

- **Create** - Creates an associated element type with the same name as the class in Innovation Planning.
- **Show** - Displays an element for any project created using the model associated with this class in Innovation Planning. You can select this option to include these projects in Planning without selecting **Create**, however Planners will not be able to create elements using the element type.

Creating Planning Element Types for Event Dates

Note: Users with the Planner, Process Designer, and Process Manager (with Add Project rights) user roles with Root level access can create planning element types. All user roles are required.

Event elements contain a single date (start date, end date, or a metric date) and represent a single point in time. For example, your company may be planning to release a new product. The development, testing, and marketing preparation for that product could take months, and be represented using different span elements that end at different times. The Planner needs visibility into the product launch date. Use an event element to represent the launch date (a single point in time) in the views within Innovation Planning.

Note: Accolade adds a non-gated class with the **Planning Show** and **Planning Create** options selected, and its associated model named ACC_Model_*<number>* for each element type. Process Designers can edit the model as needed. Administrators and Process Designers can also create classes that add element types to Innovation Planning.

To create a planning element type for an event date:

1. From the **Planning** menu, select **Planning Board**.
2. Click the planning pad in the upper right corner of the page.

   The planning pad element displayed shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to add to the board. The image above displays the default color and shape, and may be different than what is displayed in your Planning Board.
3. Do one of the following:
   - **To create an element type** - Click in **Types** list.
   - **To modify an existing element type** - Click next to the element type you want to modify.
4. In the **Name** field, enter a name, up to 64 characters long, which identifies the planning element type and its purpose.
5. Select **Event** to indicate that this element represents a single event date.
6. Click in the **Color** field, select the color for the planning element, and click outside the color panel to close the panel.

   Use colors to help group related elements.
7. In the **Shape** field, select the shape to represent the event date.
8. In the **Event Date** field, select the date to associate with this element.

   An event can represent a start date, an end date, or a date established in a date metric, such as Deadline date. Date metrics must be defined as **Available to Planning** in the metric setup.

   In the Gantt view, event dates display as a single point in time represented with a shape such as , providing a visual indicator as to when an event takes place.

9. *(Optional)* To add a metric to this type, click in the **Metrics** field and select an existing metric from the list.
   - **To add a metric without having to leave Innovation Planning** - Click **Add New** and complete the metric information, noting that unavailable options are not applicable to metrics created in Innovation Planning.
   - **To edit an existing metric** - Click the metric name to open it for editing.
   - **To display the metric on the front of the element** - Click next to the metric name. Metrics set to display are indicated with a .
   - **To remove a metric from the element** - Click next to the metric to remove.
10. *(Optional)* To add a financial matrix to the element type, click in the **Matrices** field and select an existing matrix from the list.

    Only matrices with one, and only one, **Unique** relative date are available to Innovation Planning.

Notes:

- Element types created through configuration imports are created as a **Span** type with the default shape and color. To change these settings, select the element in the **Types** list and click to open for editing.

Creating Planning Element Types That Span a Period of Time

Note: Users with the Planner, Process Designer, and Process Manager (with Add Project rights) user roles with Root level access can create planning element types. All user roles are required.

Create elements that span a period of time to represent a project or initiative that has a start and end date for completion, and that does not happen on a single date. Span elements can contain metrics and matrices. In the Gantt view, span elements display as a bar that spans the time between the start and end date.

You can also use the span element type to create organization buckets to build your organization's structure, or hierarchy. For example, you can create organizational buckets that are containers for all elements and initiatives for your technology roadmaps.

Note: Accolade adds a non-gated class with the **Planning Show** and **Planning Create** options selected, and its associated model named ACC_Model_*<number>* for each element type. Process Designers can edit the model as needed. Administrators and Process Designers can also create classes that add element types to Innovation Planning.

To create a planning element type that spans a period of time:

1. From the **Planning** menu, select **Planning Board**.
2. Click the planning pad in the upper right corner of the page.

   The planning pad element displayed shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to add to the board. The image above displays the default color and shape, and may be different than what is displayed in your Planning Board.
3. Do one of the following:
   - **To create an element type** - Click in **Types** list.
   - **To modify an existing element type** - Click next to the element type you want to modify.
4. In the **Name** field, enter a name, up to 64 characters long, which identifies the planning element type and its purpose.
5. Select **Span** to indicate that this element spans a period of time.
6. Click in the **Color** field, select the color for the planning element, and click outside the color panel to close the panel.

   Use colors to help group related elements.
7. *(Optional)* To add a metric to this type, click in the **Metrics** field and select an existing metric from the list.
   - **To add a metric without having to leave Innovation Planning** - Click **Add New** and complete the metric information , noting that unavailable options are not applicable to metrics created in Innovation Planning.
   - **To edit an existing metric** - Click the metric name to open it for editing..
   - **To display the metric on the front of the element** - Click next to the metric name. Metrics set to display are indicated with a .
   - **To remove a metric from the element** - Click next to the metric to remove.
8. *(Optional)* To add a financial matrix to the element type, click in the **Matrices** field and select an existing matrix from the list.

   Only matrices with one, and only one, **Unique** relative date are available to Innovation Planning.

Notes:

- Element types created through configuration imports are created as a **Span** type with the default shape and color. To change these settings, select the element in the **Types** list and click to open for editing.

Assigning Milestone Metrics to Planning Element Types

Milestones are project critical dates that Planners can select to display in Gantt views. These dates can include an element's gate dates, if the element is based on a gated class, and milestone dates, such as a product's launch date, that are assigned to the element type and designated as a milestone.

To assign a milestone metric to a planning element type:

1. From the **Planning** menu, select **Planning Board**.
2. Click the planning pad in the upper right corner of the page.

   The planning pad element displayed shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to add to the board. The image above displays the default color and shape, and may be different than what is displayed in your Planning Board.
3. Click next to the planning element type to modify.
4. In the **Metrics** field, click next to the metric's name to indicate it is a milestone.

   Current milestones are indicated with a .

   If the element type does not contain the metric you want to flag as a milestone, click in the **Metrics** field and select the date metric to add it to the planning element.

Assigning a Shape to a Milestone Metric

Planners can customize the icon shape and color for milestone metrics, in order to highlight critical project dates. When included in a Gantt view. milestone dates are indicated by the icon assigned in the metric definition.

To define a shape for a milestone metric:

1. From the **Planning** menu, select **Planning Board**.

   Milestone metrics can also be edited by navigating to **Process > Configuration > Metrics**, and selecting the metric to be modified.
2. Click the planning pad in the upper right corner of the page.

   The planning pad element displayed shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to add to the board. The image above displays the default color and shape, and may be different than what is displayed in your Planning Board.
3. Click next to the planning element type to modify.
4. Click the name of the milestone metric to modify.

   Current milestones are indicated with a .

5. Under the **Available To Planning** check box, select an icon from the drop-down list.

   When displayed within a Gantt view, this icon that will represent the metric's value as defined in the corresponding project.

6. Click **Update** to save your changes.

Applying Colors to a Milestone Metric

In addition to selecting an icon to represent the milestone date when displayed in a planning view, Planners can further customize the milestone by adding a list metric to define the icon color based on the metric's value in the project.

> **Note:** Applying a color to a milestone icon is not required. If a list metric is not selected, or a value for this metric is not defined within the project, the icon will default to black.

Example

For example, you have created two metrics for your planning element types - a milestone metric called **Launch Date**, which represents the product's launch date, and a color-coded list metric called **Risk**, that indicates the completion risk for each element, and whose values include Low (color-coded green), Medium (color-coded yellow) and High (color-coded red).

When **Risk** is selected in the **Milestone Shape Color Metric** drop-down list, the **Launch Date** icon will display green in a Gantt view when the project's value is Low, yellow when the project's value is Medium, and so on.

To define a color for a milestone metric:

1. From the **Planning** menu, select **Planning Board**.

   Milestone metrics can also be edited by navigating to **Process > Configuration > Metrics**, and selecting the metric to be modified.

2. Click the planning pad in the upper right corner of the page.

   The planning pad element displayed shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to add to the board. The image above displays the default color and shape, and may be different than what is displayed in your Planning Board.

3. Click  next to the planning element type to modify.
4. Click the name of the milestone metric to modify.

   Current milestones are indicated with a  .

5. In the **Milestone Shape Color Metric** drop-down list, select the metric that, when a value is applied within the project, defines the color of the milestone.
6. Click **Update** to save your changes.

Notes:

- To show relationships between milestones, the start and end milestone metrics must first be set as visible in Roadmapping.

Defining Phases for Planning Element Types

A phase within an element type can represent a stage of a project, such as Discovery, Design, Build, and Testing, or any time frame you define. For example, the Discovery portion of a project may consist of several phases that may or may not overlap, such as Marketing, Financial, and Resource phases. Using special list metrics, define the phases that display for each element in your innovation plan, providing more finite information about a planning element's schedule when displayed in a Gantt view.

Once included in a planning element type, Planners who are members of the team can enter phase names and dates and select the phase metrics values to define the colors used to represent phases for individual elements when they display within a Gantt view.

To define a phase for a planning element type:

1. From the **Planning** menu, select **Planning Board**.

   Phase metrics can also be edited by navigating to **Process > Configuration > Metrics**, and selecting the metric to be modified.

2. Click the planning pad in the upper right corner of the page.

   The planning pad element displayed shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to add to the board. The image above displays the default color and shape, and may be different than what is displayed in your Planning Board.

3. Click next to the planning element type to modify.

4. Click in the **Metrics** field and do one of the following:

   - **To define a new phase metric** - Select **Add New** and create a new list metric with the **Available to Phases** option set and color options assigned to each list item.
   - **To modify an existing phase metric** - Select an existing phase metric from the **Phases** section of the list.

     Phase metrics are list metrics that have **Available to Phases** selected, and are indicated with a . Only metrics with this option are allowed for defining the phases for an element.

5. Click **Update** to save your changes.

   The metric is now available within the phase setup on planning elements created using the planning element type.

Notes:

- Phases for planning element types are created as matrices in Accolade, which are also editable through the **Process > Configuration > Matrices** page and viewable in reports containing matrix details. Each phase matrix includes the Phase End Date metric and Phase Name metric, which you cannot edit or delete in Accolade. The phase metrics created to define phases are created as matrix metrics, and are a part of the overall matrix metric count in Accolade.
- To remove a phase matrix from a planning element, remove the matrix association from the element type's process model. When the phase matrix is no longer associated with the model, the phase definition is no longer available in an element's details. To delete a phase matrix from Accolade, you must delete the matrix through the **Process > Configuration > Matrices** page. Deleting a phase matrix does not delete its associated phase metrics.

Exercises - Creating Element Types

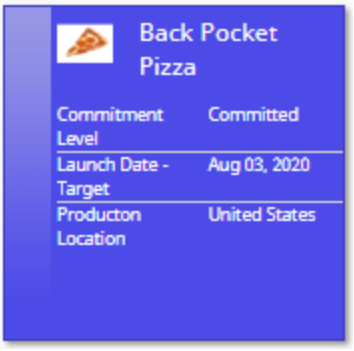
Try out what you have learned!

- Create a planning element to represent a market launch event date. Make the element blue with a lightning bolt.
- Create a planning element that represents an organizational category, such as a branch. Choose a color and the metrics to add to the element.
- In one of your elements, assign a metric to display on the front of elements that use the type.
- If you have the Process Designer or Administrator role, navigate to the **Process > Configuration > Class** page to see the classes created for the models. If you have the Process Designer role, navigate to the **Process > Models** menu to see the models created for the element types.

Planning Elements Overview

Each planning initiative or event in your planning strategy is represented as a planning element in the Planning Board. Each planning element is based on an element type that is defined with a set of dates, metrics, and matrices and that represents an initiative that spans a period of time, such as project, or a specific date in time, such as a project launch date.

Planning elements can be arranged into portfolios that represent a parent-to-child relationship, and can be assigned additional dependencies. How Planners at your company define what a planning element is and what it represents can vary. However, how you add elements to the Planning Board and enter the element's details is the same.



Adding Planning Elements to the Planning Board

A planning element is the tool used to enter a plan, project, or initiative in Accolade Innovation Planning. You can add elements to the Canvas, Grid, or Gantt views. However, when you are first implementing Innovation Planning, it is easiest to add and organize elements directly to the Canvas view.

Planners with the Process Manager user role with Add Project rights at the Root level can add an element to the top-level Planning Board. To add an element to a child board, you must have Add Project rights to the access group assigned to the *parent* element. In addition, if security lists are in use, you must have rights to the same security list values as the parent to add an element to a parent's child board. Access groups are assigned to elements in the element details under the Security section.

Each planning element has a corresponding project in Accolade with the same data. The project and the element are two ways of looking at the same data, but a project may contain data that is not available from the planning element.

Note: You can only add an element to a Gantt view or Grid view if the view selections are based on metrics that the element contains.

To add a planning element to any view in the Planning Board:

1. From the **Planning** menu, select **Planning Board**.
2. Navigate to the view and hierarchical level where you want to create the element.
3. Do one of the following to add a planning element to the planning board:
   - Click the planning pad in the upper right corner of the page and drag a planning element onto the planning board.

     The planning pad shows the type of element that is created when you drag a planning element from the pad onto the Planning Board, and defaults to the last element type you selected to

add to the board. The image above displays the default color and shape, and may be different that what is displayed in your Planning Board.

To select a different element type, click the planning pad and select a type from the **Types** list.

Planning element types that are square are elements that span a period of time and have a start and end date defined. Planning element types that are a different shape, such as a diamond, represent an event date.

- Click the planning pad and click an element icon (not the name) in the **Types** list and drag it onto the planning board. You can drag an element from the **Types** list when the pointer changes to .

4. If you are in the Canvas view, enter the element's name and press **Enter**. If you are in the Grid or Gantt view, continue with the next step to enter the element's name.
5. Hover over the element and click to make the following changes:
   - Enter the element's details or metric values.
   - Change the project thumbnail image associated with the project.
   - Add or remove team members.
   - Configure phase information.
   - Display or modify the project relationships or dependencies.
   - Set the planning element security.
   - Delete the element.
6. 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 related projects in a hierarchy.
   - - click to display the related child projects.

Notes:

- By default, planning elements added to the top-level Planning Board are added to the Root access group and the security lists (if enabled) are set to the same security list settings as your user.
- To change the planning element type associated with an element, Process Managers can migrate the associated project to a model that has a class that is equivalent to the desired element type.

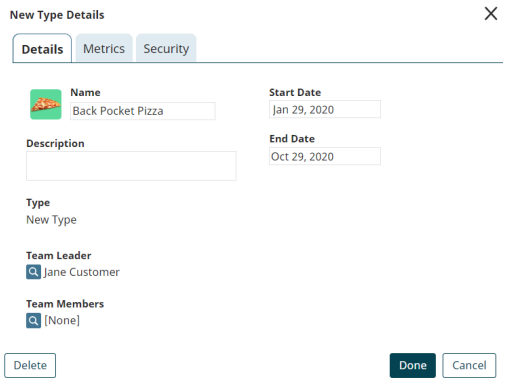
Entering Planning Element Details, Metrics, and Matrix Values

Process Managers with Manage Process rights and the assigned project manager (or team leader) for an element can update data within an element including its details, associated metric and matrix values, and images.

Note: Only one user can edit an element at a time. This includes a single user having the same element open in multiple instances of Innovation Planning. For example, in multiple tabs in a browser showing different views.

Details

A planning element's details include the element's name, a description of the element, any Extended Project Data fields if enabled in the model, the element's thumbnail image, and the element's dates.



To update a planning element's details:

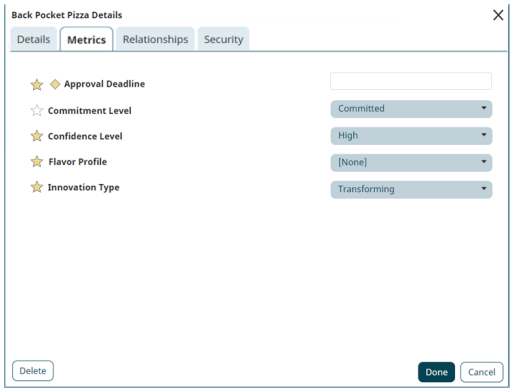
1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click  to open the element for editing.
4. Open the **Details** tab and enter project details as necessary:

Field	Description
Name	The name of the element, that describes the project or strategic initiative it represents. The process model configuration for the element type determines whether the element name is editable. The configuration may be defined to generate the name based on a metric value.
Thumbnail Image	If an image other than an image of the element displays, click the image, select **Choose Image**, and select a new image.
Description	Enter a statement about the project or the project's goal. This is the body of the element at this level. You can enter additional details in child elements.
Start Date and End Date	Click the box and select the date when the project or initiative begins and ends.

Field	Description
	Start and end dates apply only to span element types. Only the project manager assigned to a planning element can update the element's dates.
Event Date	Click the box and select the date of the event. Event dates apply only to event element types. Only the project manager assigned to a planning element can update the element's dates.
Additional Text Fields	If included for a planning element type, enter any additional information in the additional fields provided.

5. Click **Done** to apply your changes.

Metric Values



Change the values of metrics in elements in which you are a member of the team or the assigned project manager. Planners with the Process Manager user role can change metric values in any element to which they have access. The metrics that you can view or edit are dependent upon your system security settings, to include access groups, security lists and profiles.

> Within a Grid view, drag an element into a different metric column or row to update the element's metric values. In a Gantt view, drag an element into a different row if the **Vertical Axis** selection is a metric to update the element's metric values.

To update a planning element's metric values:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click to open the element for editing.
4. Open the **Metrics** tab and enter new metric values as necessary.

   Important! Calculated metrics are read-only in Innovation Planning. They can be identified by the dashed line around the metric value. The value of a calculated metric changes if the value of a metric that it is based on changes, or if its expression is changed in Accolade.

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5. Click **Done** to apply your changes.

Matrix Values

View and modify a matrix if you are a member of the project team on the element containing the matrix.

> If the **Related To** date in a matrix is based on the project start or end date, you can change the date by dragging the element to a new start or end date in a Gantt view. If the **Related To** date is based on a date metric, you can change the date by dragging the element in a Grid view where one of the axes is based on the other date metric.

To update a planning element's matrix values:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click to open the element for editing.
4. Open the tab specific to the matrix.
5. In **Related To** section, enter the actual date from which the relative date in the metric starts.

   If the related to date has been saved in the element, it displays here.
6. In the **Matrix Range** section, enter the beginning and ending dates for the range to display in the matrix.

   When you first view a matrix, it does not display any rows. After entering the **Related To** date, the matrix displays a single row. Change the matrix range to add matrix rows.
7. Select **In Rows** to display the dates down the left side of the matrix; select **In Columns** to display the dates across the top of the matrix.
8. Enter metric values, as necessary.

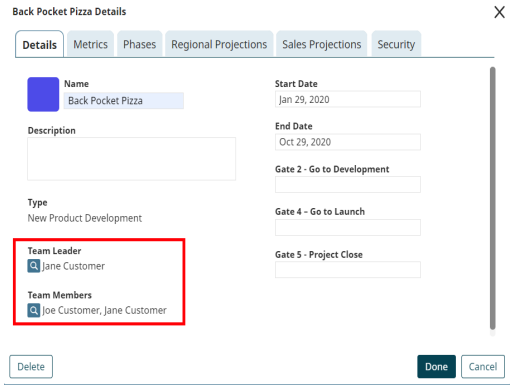
   Click to delete values in a row.
9. Click **Done** to apply your changes.

> Empty rows at the bottom of the matrix are not saved. To save the number of rows you selected originally, including the original **To** date in the matrix range, enter "placeholder" data in the last row of the matrix before clicking **Done** to save it. The structure of the matrix, including empty rows, is saved to the last row containing data.

Assigning Teams to Planning Elements

Note: Process Managers with Manage Process rights can change the Team Leader assignment for any planning element they can access. The planning element's assigned Team Leader or a Process Manager with Manage Team rights can update members of the project team. The Planner user role is required to have access to Accolade Innovation Planning.

Assign project managers (team leader) and other team members who are part of the creation and delivery process for the project or initiative represented in a planning element. A planning element has two kinds of team members, each with different rights to edit information within the planning element.



- **Project Managers/Team Leader** - The Planner who creates the planning element becomes the project manager for the element and has rights to make all changes to the element, including editing all data and adding other team members. Only users with the Project Manager user role can be assigned as the project manager of a planning element.
- **Team Members** - Team members are users that are added to the project team. Team members can edit aspects of an element such as metric values. Team members added to the element are also added to the project. Only users with the Project Team Member user role can be assigned as team members of a project.

To assign a team leader or team members to a planning element:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click to open the element for editing.
4. Open the **Details** tab.
5. In the **Team Leader** and/or **Team Members** fields, click to select the appropriate users.

   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

   - Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
   - Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.
   - Clicking the **Show advanced filters** check box displays or hides the additional filter options.
   - Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned.

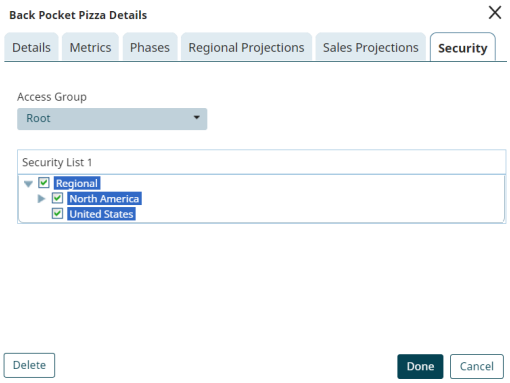
   Highlight the user name(s) in the Available Users window and click **Select**, or double-click each user's name to move them from the **Available** list to the **Selected** list.
6. Click **Done** to exit the dialog.
7. Click **Done** to apply your changes.

Setting Planning Element Security

For each element, define access group assignments and security list assignments that restrict who can view and interact with the planning element within Innovation Planning. Users must be assigned to the access groups and have matching security assignments to view the element and any of its potential children within any view.

> **Note:** To change the security settings on an element, you must have the Process Manager role with Manage Process rights for the access group level assigned to the element.

Elements added to a child board inherit the access group assignments from the parent element.



To set a planning element's security:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click to open the element for editing.
4. Open the **Security** tab.
5. In the **Access Group** field, select the access group to which this element applies.
6. If security lists are enabled, select the options within the security lists that apply to this element.
7. Click **Done** to apply your changes.

Configuring Phase Names and Dates in Planning Elements

A phase within an element type can represent a stage of a project, such as Discovery, Design, Build, and Testing, or any time frame you define. For example, the Discovery portion of a project may consist of several phases that may or may not overlap, such as Marketing, Financial, and Resource phases.

Planners who are members of the project team can enter phase names and dates and select the phase metrics values to define the colors used to represent phases for individual elements when they display within a Gantt view.

To configure a phase name and date for a planning element:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click to open the element for editing.
4. Open the **Phases** tab.

   The **Phases** option reflects the planning element's name, and is only available if phase metrics are associated with the planning element's type.
5. In the table, complete to following information to define the phases for the element:

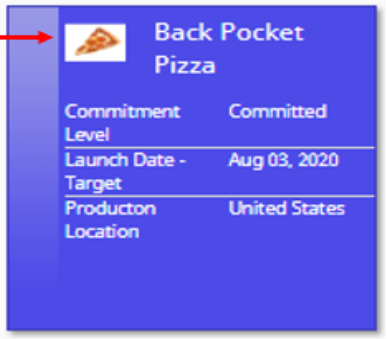
Field	Description
Phase End Date	Enter the last date of the phase. The phase runs from the phase end date before it to this date. If this is the first phase, the phase start date is determined by the element's start date.
Phase Name	Enter a name that identifies the phase's purpose and reflects the activity within the phase.
Phase Metric Values	*(Optional)* Each phase metric available to the planning element type is listed in the remaining columns in the table. Select the value for the phase you are defining. The metric value you select defines the color of the phase in the Gantt view. Phases that do not have a selected value display with no color for that phase.

   If phase metrics have been deleted from the element, but the phase matrix has not been removed, you can set a **Phase End Date** and a **Phase Name**, but no additional metric values are available. In this case, phases display with no color options available in the Gantt view.
6. Click to add additional phase name and date combinations and complete the information for the phase as described in step 5.
7. Click **Done** to apply your changes.

Identifying Planning Elements with Images

The assigned project manager for a planning element can add a thumbnail image to the planning element to help identify it within planning views and the corresponding project pages. If you add an image to an event date element, the element's shape defined in the element type is maintained and visible on the front of the element in the various views. The thumbnail image is viewable within the element details.

Within a Grid or Gantt view, hover over the image to display it. Click in the popup to pin the image to the view. From there you can click and drag the popup to move it in the view.



To upload a thumbnail image to an element:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Hover over the element and click to open the element for editing.
4. In the **Details** tab, click the image that displays next to the element name.

   If a thumbnail image has not been uploaded to this element, a picture of the element displays.
5. Click **Choose Image**, select a file to apply to the element, and click **Open**.
6. Click **Upload File** to upload the file to the element.
7. Click **Done** to apply your changes.

Notes:

- To delete a thumbnail image, click in an element, open the **Details** tab, click the image, and click **Remove**. Removing an image thumbnail removes it as the thumbnail image; however, the image is still available as a related document within the corresponding project in Accolade.

Exercises - Creating Elements

Try out what you have learned!

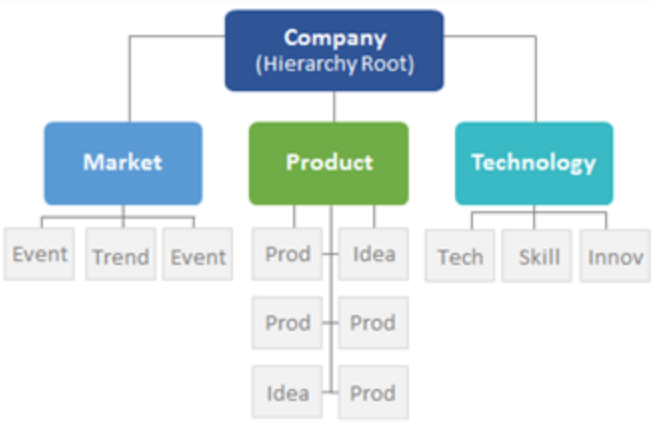
- Add a planning element of each element type you have created to the planning board.
- For each planning element, access the element details and update the title, dates, and metric values.
- Add a thumbnail image to represent the planning element.

Creating the Business Hierarchy

Group the elements in your innovation plan into parent/child relationships to provide better insight into portions of the map or portfolio areas, and better groupings for security purposes.

This is a jumble of projects, initiatives, and events that is hard to decipher on the planning board.

Using hierarchies allows Planners to take a complex plan and model it based on a parent/child relationship. The top level in the hierarchy is the Root access level. Each element on the board has a child board that contains the elements at that level in the hierarchy, representing the parent/child relationship.



Your organization may require additional organizational categories. For example, you may have sub-categories for Business Units and Brands if those make sense in your organization. Create as many levels as you need, but remember to keep it as simple as you can.

Grouping elements into a hierarchy can also provide a way to grant security access and to build views for portions of the overall hierarchy. Depending on an element's assigned security, a user may not see the entire hierarchy.

Nesting Planning Elements in Hierarchies

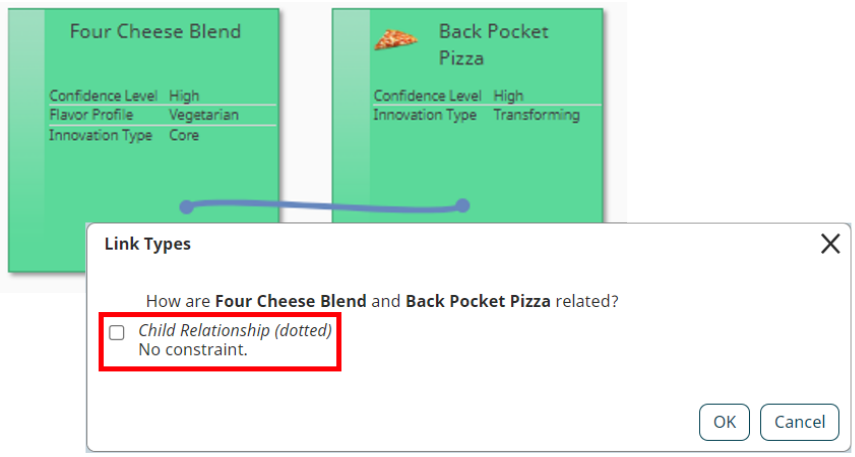
Planners who are also Process Managers can create a hierarchy of planning elements by adding one or more child elements to any element and then adding child elements to those children, and so on. Using hierarchies allows Planners to create complex plans by modeling elements that are components of, or in some sense subordinate to, other elements.

To add an element to a child board, you must have Add Project rights to the access group assigned to the parent element. In addition, if security lists are in use, you must have rights to the same security list values as the parent to add an element to a parent's child board. Access groups are assigned to the parent element in the element details.

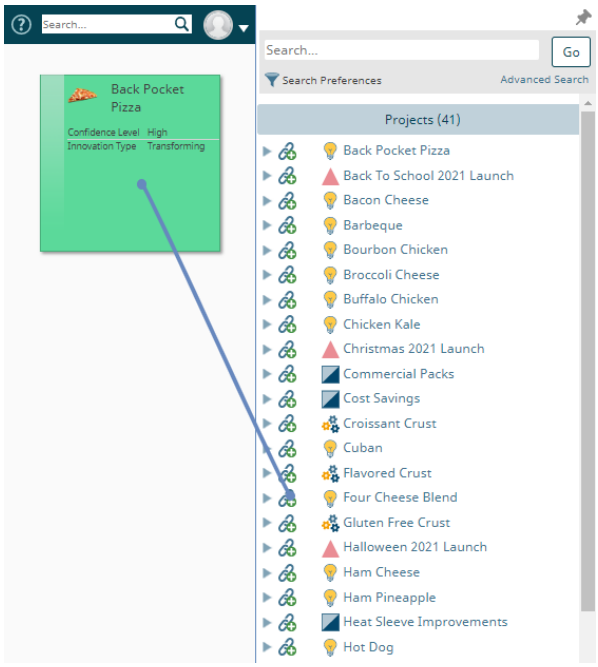
To add one or more child elements to a planning element:

1. From the **Planning** menu, select **Planning Board**.
2. Do one of the following:
   - **Drag new elements onto a child board** - In any view, hover over the element and click to open the element's child board.

     When you display an element's child board, and the name of the parent element display at the top of the board. The board you are viewing shows one level of the hierarchy, the children of the parent element identified above. You can add child elements by dragging them from the planning pad or Types list.
   - **Create a child relationship link** - Click and hold on the parent element until your cursor changes to , then drag the line to the child element.

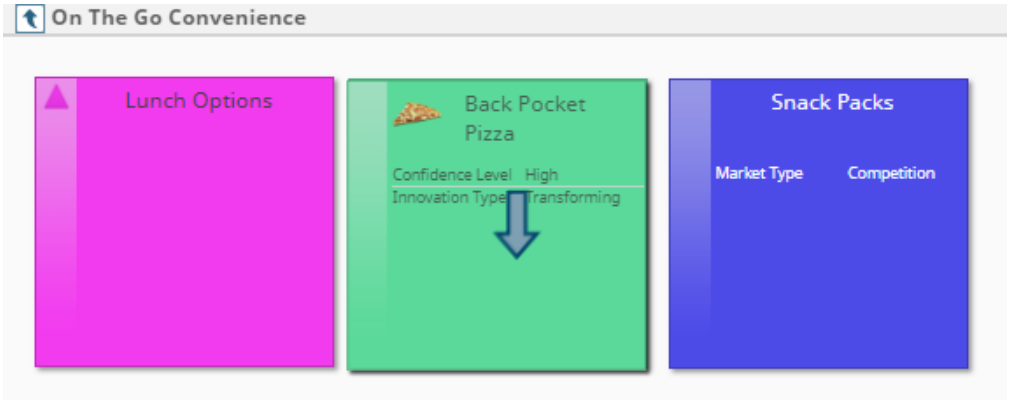


You can also create these links by dragging from Quick Search results.



- **Move elements to the child board of an existing element** - In the Canvas view, drag an element or selected group of elements until it exactly covers the parent element.

  Drop the element or group when a blue, down arrow displays.



Notice that with this technique the elements are moved to the child board, but you remain on the board where the parent element resides. You lose this ability to move elements to another element's child board if you change to a Grid view while you are on the child board.

3. Add as many planning elements to the board as you need and enter their names, details, and metric values as needed.
4. Continue to build the hierarchy by hovering over one of the child elements, clicking and adding the next level of child elements to it.

   Click in the top left corner of the page to navigate back up through the hierarchy.

Move Planning Elements Up One Level in the Hierarchy

From an element's child board, drag the element towards the button above the planning board. Drop the element when a blue, up arrow displays.

Using Auto-Linking Rules for Element Organization

You can use the Accolade auto-linking feature to define rules based on a metric selection that establishes the parent/child relationship automatically as you add planning elements.

For example, if a planning initiative is set to a specific business unit or is classified into a specific product area, using a link rule allows for the link to be created automatically without having to move the element manually to establish the hierarchy. In addition, if something in your organization changes, you can update all the links at once by changing only the rule definition, and not opening each element to reset the link.

See the online Help for more information about establishing automatic link rules between projects.

Notes:

- Elements added to the child board inherit the security settings from the elements on their parent board.

Displaying Planning Element Hierarchies

View the parent-child relationships for an element using the element's child board or the hierarchy board. You cannot add elements to the hierarchy board or go to the child board of any of the elements.

Displaying the Hierarchy One Level at a Time (Child Board)

The child board shows the children of a single element, that is, the elements that are one level below it in its hierarchy.

On the child board you can add more children to the parent element or continue to navigate down through the child boards of the elements on each level. By going from child board to child board, you can eventually view the entire hierarchy. In child board, you can complete the same actions that you could do to the parent elements at the top of the hierarchy.

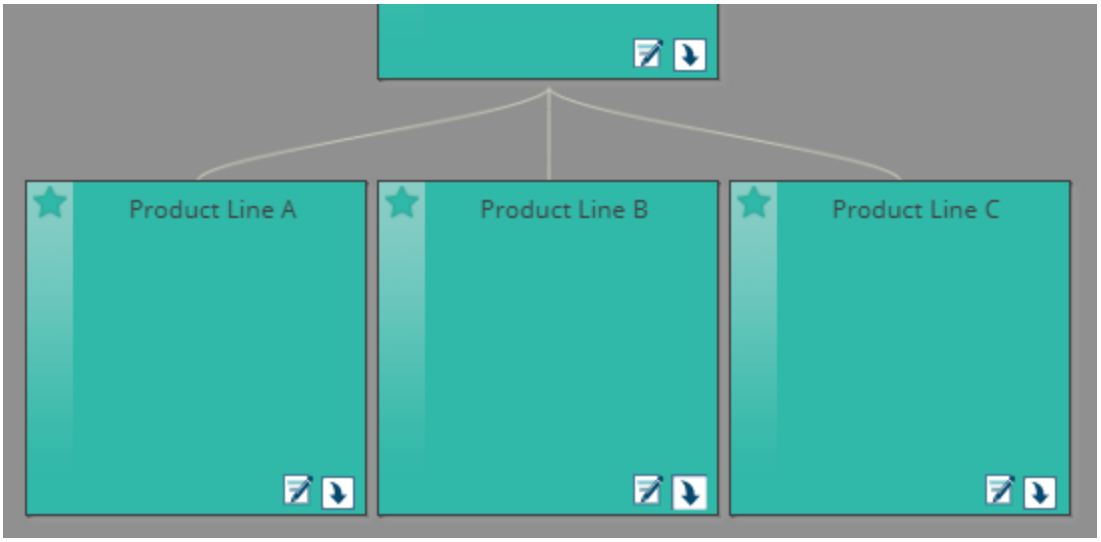
To view an element's hierarchy one level at a time in the child board:

1. Hover over the element and click  to open the child board.

   When you display an element's child board,  and the name of the parent element displays at the top of the board. To view where you are in the hierarchical structure for that element, click  to display a hierarchy tree. From the displayed view, select a level to navigate back up through the hierarchy. **Root** indicates the top level of the hierarchy (if you have access rights to view the top-most level). The child board you are currently viewing displays as the last level in the tree.

Displaying the Hierarchy Several Levels at a Time (Hierarchy Board)

Use the hierarchy board to view several levels of an element's hierarchy in a diagram.



To view several levels of an element's hierarchy:

1. Hover over the element and click to view the hierarchy.

   The planning element hierarchy with the element you selected at the top and at most two lower levels of the hierarchy below it displays.

   - Click the gray background and drag it to scroll through the displayed hierarchy by. You can modify the details of the elements that you can see on the hierarchy board.
   - Click the body of a planning element to display two levels of the hierarchy below the element you clicked.

   The planning element at the bottom of the wide white line is the element you clicked last. The board remembers the position of the element that was clicked last, and if you click another element, the hierarchy will shift to place that new element in the location of the previous element.

To view an element's child board from the hierarchy board:

1. Hover over the element and click to go to that element's child board.

Notes:

- You must have security access to the elements to view them in the hierarchy.
- While you are dragging the hierarchy or the board, the hierarchy can become "stuck" to the pointer so that it moves even though you have released the mouse. To "unstick" the hierarchy, click the board.
- The hierarchy board always displays the same regardless of what view you start in. When view an element's child board, the child board displays in the same view type as where you started. If you started from the Canvas, the child board displays as another canvas page. If you started from a Grid or Gantt view, the child board displays as another Grid or Gantt.

Exercises - Working with Hierarchies

Try out what you have learned!

- Create a parent/child relationship by dragging an element and dropping it on top of another element.
- Move that same element back up to its original board.
- Create a parent/child relationship by dragging a link between two elements and selecting the Child Relationship option.

Planning Element Relationships

Links in Innovation Planning show that there is a relationship between two planning elements, such as a technology relationship or a launch dependency. Planners who are planning element team members can create relationships between elements. Details about existing links are available within each element's details.

Links between elements can have the following dependency relationships:

- **Child/Hierarchy Relationship** - No dependency between the start and finish of either element. Hierarchy links indicate that an element is part of another element's child board.
- **Start - Start** - The source element must start before the target element can start.
- **Finish - Finish** - The source element must finish before the target element can finish.
- **Finish - Start** - The source element must finish before the target element can start.
- **Date - Date** - A date in the source project must be before a date in the target project.
- **None** - Indicates there is a relationship between two elements, but there are no date or hierarchy dependencies.

Dependencies are not enforced in the system in terms of when a project or initiative can start. For example, in a finish-to-start dependency, work can actually begin on the starting element before the finishing element finishes.

When developing an innovation plan, the option to create a child relationship link with no start or finish date dependency is always available in Innovation Planning. If your company has purchased Accolade Roadmapping, dependencies other than a parent/child relationship are available. In order to create links with start and finish dependencies in Innovation Planning, an Administrator or Process Designer must first create the link types on which they are based within Accolade.

Creating Relationships Between Planning Elements

Links in Innovation Planning show there is a relationship between two planning elements. With the appropriate roles and rights, planning element team members that have the Planner role can create relationships between available elements by dragging a line from one planning element to the other within a view, or by dragging a line between projects when using Quick Search. Details about existing links are available within each element's details.

Creating Links Between Planning Elements in Any Level

Using the Accolade Quick Search, you can search for projects that exist throughout Accolade (to which you have visibility) and create a link to any planning element or project that displays in any Innovation Planning view. You can also create links between projects that are returned in the search directly within the search results. Creating links in this manner allows you to create links between planning elements across the company without having to create views within Innovation Planning.

Note: The link option from Quick Search is only available when using Quick Search while in the planning board or a view in Innovation Planning.

To create a link between planning elements in any level:

1. From the **Planning** menu, select **Planning Board**.
2. With the Planning Board displayed, enter text into Quick Search in the Accolade title bar.

   In Gantt views, you must be in Link mode (click in the upper right corner of the page, and select **Create**) prior to entering your search criteria.
3. Within the returned results, click next to a project and drag to another project within the Quick Search window, or to a planning element displayed in a view in Innovation Planning.

   To create a dependency that an element starts after another element finishes, or that have a date-before-date dependency, drag the line from the source element to the target element. For example, if project A must finish before project B can start, you would draw the line *from* the source element project A *to* the target element project B, and select the relationship type **Finish - Start**. For other kinds of dependencies, it does not matter which direction you drag the line.

   You can also create links from a planning element in a view to a project in the Quick Search results. Click and hold on an element until your cursor changes to , then drag the line to a project result within the Quick Search.
4. In the Link Types dialog, select the relationship type to create.

   For **Date - Date** link types, click the link in the relationship description to select the date that the dependency is based on, such as the project's start date, end date, a gate date, or a date metric available within the element.
5. Click **OK** to create the link.

   To create multiple links without the Quick Search window closing, click in the top right corner of the Quick Search display to pin the display to the main window. When you are finished creating links, click the icon again to close Quick Search.

Creating Links in Planning Views

Creating links between planning elements within views creates the same types of links as are available when using Quick Search; however, you can only create links between the elements that are displayed within the view.

To create a link between planning elements within a planning view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.

In Gantt views, you must be in Link mode (click in the upper right corner of the page, and select **Create**) in order to create links. If necessary, display existing relationships to include enough levels to display the elements you want to link.

3. Click and hold on an element until your cursor changes to , then drag the line to another element.

   To create a dependency that an element starts after another element finishes, or that have a date-before-date dependency, drag the line from the source element to the target element. For example, if project A must finish before project B can start, you would draw the line *from* the source element project A *to* the target element project B, and select the relationship type **Finish - Start**. For other kinds of dependencies, it does not matter which direction you drag the line.

   If the element you are dragging towards is off screen, the view starts to scroll.

4. In the Link Types dialog, select the relationship type to create.

   For **Date - Date** link types, click the link in the relationship description to select the date that the dependency is based on, such as the project's start date, end date, a gate date, or a date metric available within the element.

   To show relationships between milestones, the start and end milestone metrics must first be set as visible in Roadmapping.

   Important! If you create a link between two elements whose dates are in violation of the dependency set in the link type, or you change dates within linked elements that are in violation of the dependency, the system alerts you that there is a conflict with the relationship. You can select to break the relationship before continuing with the date change, or change the date even though there is a conflict.

   If you choose to ignore the relationship conflict, the conflict status is indicated by the icon displayed next to the element's name within the view. Clicking on the icon will open a dialog that displays the details and options for resolving the conflict.

   ---

5. Click **OK** to create the link.

   To confirm the creation of the link or view information about it without displaying the relationship lines, hover over the element and click to view the element's relationship links. Information about an element's links can also be viewed on the **Related Projects** page of the associated project.

Using Auto-Linking Rules to Create Relationships

You can use the Accolade auto-linking feature to define rules based on a metric selection that establishes dependency relationships automatically between planning elements. See the Linking Related Projects topic in the online Help for more information about establishing automatic link rules between projects.

Notes:

- To delete a relationship link, click the relationship line to be deleted and click to remove the link. If you delete the link in error, click while in the dialog to reapply the relationship link to the projects.

  Relationship links can also be deleted by clicking on the source element and drag a link line to the target element again. In the Link Types dialog, clear the check box of the link type you want to delete and click **OK**. All links of that type between the two elements are deleted.
- In the Canvas view, if you create a link with no dependency the linked to element moves to the child board.
- If you have a large number of relationships to create or update in Innovation Planning, consider importing the relationships using the project link data import utility.

Displaying Relationships Between Planning Elements

Links in Innovation Planning show there is a relationship between two planning elements. Relationships display as lines linking planning elements together, and include hierarchical (**Parent-Child-Grandchild**) links, dependency links (**Start - Start, Finish - Finish, Finish - Start, and Date - Date**), and relationship links (**None**). When you select to display relationships, you select the relationship types you want to view, the planning elements, and the hierarchical level to include.

To display relationships between elements in individual planning views:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Click in the upper right corner of the page to open the Show Relationships dialog.
   - To view relationships for all relationship types, all planning elements, and five hierarchical levels, select the **Show all lines, elements, and levels** check box at the top of the dialog box and continue with step 7.
   - To select specific relationship types, planning elements, and/or levels for which you want to view relationships, continue with step 4.

   Important! If there are relationships included in the view that have date conflicts, the icon will display in the dialog next to the relationship types with conflicts. Click the icon to display the details and options for resolving the conflict.

   In Gantt and composite Gantt views, the icon also displays next to the element's name in the view to indicate the conflict status.

   ---
4. In the **Elements to display** field, select the planning elements within the view for which you want to display relationships.

This list only displays the planning elements that display in the current view and defaults to all elements selected. To select specific elements, select **Uncheck All** at the top of the drop-down list and then select the appropriate elements to include in the view.

5. For each relationship type, select the **Show** check box to include lines between related elements in the view for that relationship type.

   To show the lines for all relationship types, select the **Show** check box for the **[All]** relationship type at the top of the list. To view relationship types without showing the lines, skip this step and continue with step 6.

   Note: If you do not select to show lines for a relationship type, elements are still brought into the view based on the hierarchy selection in step 4 without displaying relationship lines between them.

6. For each relationship type, use the **Levels to display** slider selection to indicate how many hierarchical levels you want to include in the view.

   For example, if you slide the selector to **3**, relationships are displayed to elements that are three levels deep in the hierarchy from a parent element. To select the same level for all the selected relationship types, use the slider selection for the **[All]** relationship type at the top of the list.

   After relationships are brought into the view, you can select to display fewer levels by reopening the dialog and adjusting the slider selection.

7. Click the **Line legend** check box to display the key that identifies what relationships the line colors in the view represent.

   The default legend selection displays the relationships displayed in the view. Clicking on a legend item will hide the corresponding relationships from the view, and the legend item will display with a strikethrough. Clicking on a strikethrough legend item will remove the strikethrough and display the corresponding relationships.

   Click within the view to expand or collapse the legend as necessary.

8. Customize how the relationship lines are displayed on the view by clicking the **Lines over elements** check box and selecting a line type of **Default** or **Straight**.
9. Click **Done** to view the relationships that match your selections.
10. Click **Save** in the top right corner of the view to save your changes to the view.

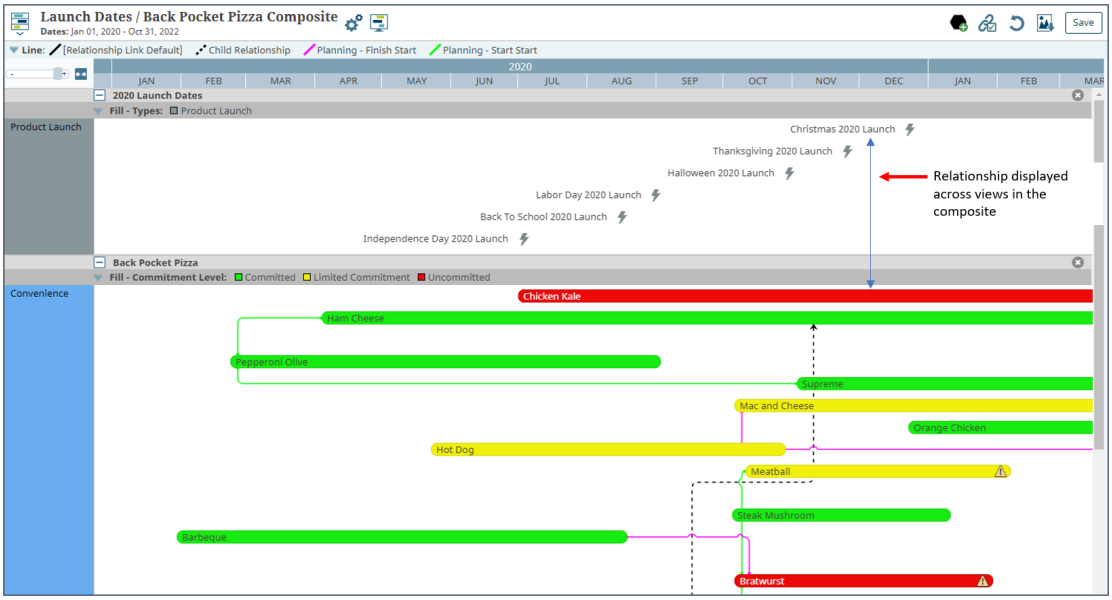
    To view a planning element's relationship links, hover over the element and click . Information about an element's links can also be viewed on the element's Relationships tab, or on the **Related Projects** page of the associated project.

Relationships in Composite Gantt Views

Each web browser has a limit in length for a relationship line it can display. If the composite view contains multiple, large views, and your relationship lines stop before connecting with an element, use metric filters within the composite to help refine the content of the views.

In a composite Gantt view:

- Relationships saved for the individual Gantt views display the same as they would when displayed individually.
- You can also select to display relationships across the views within the composite to show the dependencies across the individual Gantts.
- You cannot select to include additional levels from a parent's hierarchy for a further, in-depth view when displaying relationships in a composite view.



To display relationships between planning elements across composites:

1. From the **Planning** menu, select **Planning Board**.
2. Create a composite view or display an existing composite.
3. Click in the upper right corner of the page to open the Show Relationships dialog.

Important! If there are relationships included in the view that have date conflicts, the icon will display in the dialog next to the relationship types with conflicts. Click the icon to display the details and options for resolving the conflict.

In Gantt and composite Gantt views, the  icon also displays next to the element's name in the view to indicate the conflict status.

4. In the **Elements to display** field, select the planning elements within the view for which you want to display relationships.

   This list only displays the planning elements that display in the current view and defaults to all elements selected. To select specific elements, select **Uncheck All** at the top of the drop-down list and then select the appropriate elements to include in the view.

5. For each relationship type, select the **Show** check box to include lines between related elements across the composite view for that relationship type.
6. Click the **Line legend** check box to display the key that identifies what relationships the line colors in the view represent.

   The default legend selection displays the relationships displayed in the view. Clicking on a legend item will hide the corresponding relationships from the view, and the legend item will display with a strikethrough. Clicking on a strikethrough legend item will remove the strikethrough and display the corresponding relationships.

   Click  within the view to expand or collapse the legend as necessary.
7. Customize how the relationship lines are displayed on the view by clicking the **Lines over elements** check box and selecting a line type of **Default** or **Straight**.
8. Click **Done** to view the relationships that match your selections.
9. Click **Save** in the top right corner of the view to save your changes to the view.

To view a planning element's relationship links, hover over the element and click  . Information about an element's links can also be viewed on the element's Relationships tab, or on the **Related Projects**  page of the associated project.

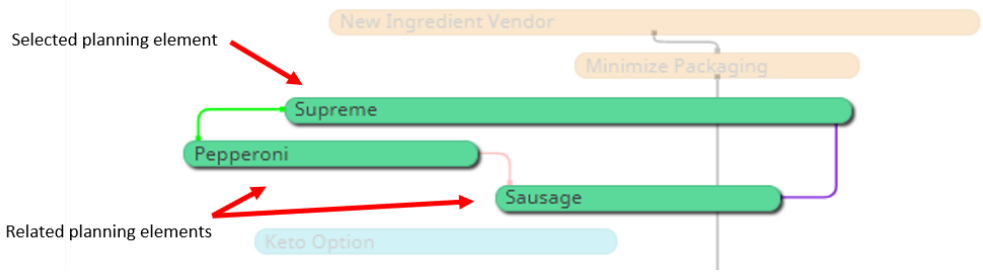
Viewing Everything Related to a Planning Element

After selecting the relationships to view, select a single element to highlight its relationships within the view.

- The element you select and all linked elements display with a black shadow. All other elements and relationships still display, but are muted in the background.

  In presentation mode, clicking on an element displays the selected element and its relationships, and hides all other elements and relationships.

- Clicking on one of the related planning elements will change the highlight to the newly selected element and its relationships.
- Click anywhere within the view background to return to the view.



Notes:

- To delete a relationship link, click the line representing the relationship to be deleted, and click to remove the link. If you delete the link in error, click while in the dialog to reapply the relationship link to the projects.

  Relationship links can also be deleted by clicking on the source element and drag a link line to the target element again. In the Link Types dialog box, clear the check box of the link type you want to delete and click **OK**. All links of that type between the two elements are deleted.
- In Gantt views, relationships created using the **Date - Date** relationship type to a metric date are drawn from the exact date position on the source element to the exact date position on the target element. The metric dates within the elements are represented by icons displayed above the element's span. If a link points to an element start or end date that is not part of the element's displayed span in the Gantt, the icons defined in the process model indicate the exact start or end date for the link. Use the tooltips for the icons in the Gantt views to view the date information. To show relationships between milestones, the start and end milestone metrics must first be set as visible in Roadmapping.
- In Gantt views, planning elements brought into the view display in the appropriate row based on your selection criteria for the Gantt. When viewing relationships in a hierarchy Gantt, if a planning element is shown in a child row but the row is collapsed, the relationship line does not display until the parent row is expanded to show its nested child rows. If a planning element brought into the view does not fall into a displayed row, it displays in the **None** row at the top of the Gantt.

Resolving Relationship Conflicts Between Planning Elements

In Accolade Innovation Planning, elements with a conflict in their relationship, such as two elements with a Finish - Start relationship where the start date of project B is before the finish date of project A, will display the icon to indicate the conflict.

For all planning views, relationship types with conflicts display the icon in the dialog when selecting relationships to display. In Gantt and composite Gantt views, the icon will also display next to the element's name in the view.

Information about an element's relationship links can also be viewed on the element's Relationship tab, or on the **Related Projects** page of the associated project.

To resolve conflicts when selecting relationships to display in a view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Click in the upper right corner of the page to open the Show Relationships dialog.
4. The icon will display in the dialog next to the relationship types that have date conflicts. Click next to each warning to display the relationship type conflict details, and select one of the following options:
   - Adjust one or both of the two specified dates that are creating the conflict. Note that adjusting a date will apply the date change to the project, and may impact other relationships or dependencies. Once you click **Done** and close the dialog, this date change is applied to the project, but the date change can be undone by clicking in the view header.

     A message displays at the bottom of the dialog if new conflicts are created by date changes. Clicking **Refresh List** will refresh the list, and new conflicts will display within the dialog with next to the relationship type.

   - Click to delete the relationship link between the two projects in conflict.

     If you delete the link in error, click in the dialog to reapply the relationship link to the displayed projects. Once you click **Done** and close the dialog, the link deletion is applied to the project and the link must be manually recreated.
   - Ignore the conflict and load the selected relationships. Relationships in conflict will continue to display the icon next to the element's name in the view.
5. Click **Done** to save your changes and display the selected relationships.

To resolve a specific relationship conflict between planning elements within a view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display an existing view.
3. Click to open the Manage Relationships dialog and display the element's relationship conflicts.

   Clicking on the relationship line between the two elements in conflict will also open the dialog for review and editing.

4. Select one of the following options:

- Adjust one or both of the two specified dates that are creating the conflict. Note that adjusting a date will apply the date change to the project, and may impact other relationships or dependencies. Once you click **Done** and close the dialog, this date change is applied to the project, but the date change can be undone by clicking  in the view header.

   If new conflicts are created by date changes, they will display in the dialog with  next to the relationship type.

- Click  to delete the relationship link between the two projects in conflict.

  If you delete the link in error, click  in the dialog to reapply the relationship link to the displayed projects. Once you click **Done** and close the dialog, the link deletion is applied to the project and the link must be manually recreated.

- Ignore the conflict and load the selected relationships. Relationships in conflict will continue to display the  icon next to the element's name in the view.

5. Click **Done** to save your changes and display the selected relationships.

Notes:

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