Sopheon Accolade®

Collaborative Workflow Training Guide

Version: 15.2

About Sopheon Accolade®

Document Name:	Collaborative Workflow Training Guide
Document Version:	1
Software Version:	Sopheon Accolade 15.2
Document Date:	February 2023

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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 addresses both the configuration and setup for workflows, and participating in a workflow within a project. This module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

Accolade User Roles

- Process Design*
- Project Team Members
- Project Managers

Terms and Concepts

- General Accolade terminology and concepts
- Projects

Related Training Modules

- Process Design Overview*
- Project Assignments
- Managing Projects

*For configuration and setup.

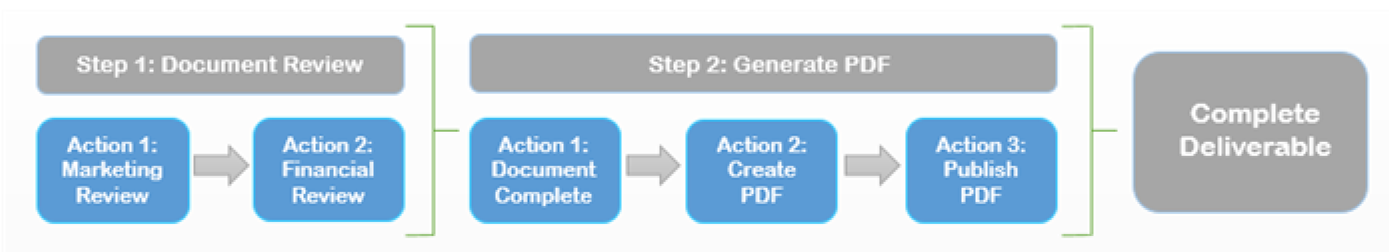
Workflows Overview

Collaborative workflows, provided as an option feature in Accolade, provide a means to define the sequence of steps and actions needed to create a complex deliverable or activity. Workflows are useful for deliverables and activities that need to be coordinated in a specific sequence. Workflows are primarily intended for the creation and review of documents, but they can be used to manage the creation of other things, such as prototypes, as well.

Administrators and Process Designers create workflows and add them to the Template Library and to models as necessary. Workflows added to the Template Library are available to add to a deliverable or activity at the process model level, and at the project level. Workflows added to a model are required before a deliverable or activity's status can be set to **Complete**. Workflows added at the project level are considered optional and do not require completion prior the deliverable or activity's status being set to **Completed**.

Workflow Steps and Actions

Each step in a workflow is a single part of producing a document, such as creating a draft or having a portion of a document reviewed. Each step contains one or more actions needed to complete the step. Each action has an owner who performs the action and a specified number of days that the action is scheduled to take. When a project is started, the Document Owner, Project Manager, or Process Manager starts the workflow. The owners of an action within a workflow are assigned permissions that determine if they can edit, publish, or approve deliverables or activities associated with the workflow.



Viewing and Completing Your Workflow Actions

When the workflow reaches the step that contains your action, learn what your action involves and determine the current state of the deliverable or activity. When you complete your action, you can enter a decision about whether the workflow should continue to the next step or be sent back to a previous step. After all reviewers complete and approve their steps, the workflow status is set to **Completed**.

Note: If conditions dictate that no actions are needed to complete the workflow, the workflow automatically runs to completion and displays in the associated deliverable and workflow history as **Completed**.

Subscribe to email notifications to receive notifications about when deliverables and activities are ready for your review, when a review is late, when a new version is created, and others.

Subscribe to at least the following notifications to ensure you are notified of the most critical workflow events:

- When deliverable is ready for your review
- When activity is ready for your review
- When deliverable review is late
- When activity review is late
- When another reviewer creates a new deliverable version
- When another reviewer creates a new activity version

Use the Work pod, available on the My Work page and in others areas of Accolade, to view the active workflow actions assigned to you or part of projects to which you have visibility. Workflow actions display on this page when workflows associated to projects are currently in progress. This page allows you a single place to view and provide general updates to your actions.

What you can do from the Work pod is based on your security settings, roles, and rights within the system. Depending on your security settings, you can do the following from the Work pod:

- Review deliverable documents or prototypes part of workflow actions.
- Enter a decision on workflow actions you own.
- Change workflow action owners and change or set review deadlines.
- View the project, stage, and deliverable or activity containing the workflow(s).

Additionally, you may be set as the action owner with edit rights. This role grants you the following additional rights within a workflow and the deliverable or activity to which it is attached:

- Upload versions of the document in the workflow. To publish a version, an action owner in a workflow step must have publish rights to publish a version of a deliverable or activity within the workflow step.
- Delete deliverable or activity versions (if the model allows it).
- Enter deliverable or activity status notes.
- Enter data in the deliverable or activity quick grid.
- Upload related documents associated with the deliverable or activity.
- Add an activity to the deliverable and upload activity versions (as action owner of a deliverable workflow).
- Change the new activity's description, status, and status notes.
- Select a different user as the owner of your action.

To view your workflow actions and components:

1. From the **Workspace** menu, select **My Work**.

Your current workflow actions display for any deliverable and activity based on any filters set if you have customized the pod. You can configure the Work pod to filter for deliverables and activities that have workflows by clicking and applying a filter.

2. *(Optional)* Access the project, deliverable or activity, and stage containing the workflows listed from this page.
   - To view the workflow, click . If the workflow is in progress, click to view the workflow.
   - To view the project containing the workflow, click the project name.
   - To view the deliverable or activity containing the workflow, click the deliverable or activity name.
3. *(Optional)* If you have the editing rights to do so modify an action owner or a review deadline. Begin by opening the workflow and then do one of the below.

Action	Procedure
Modify Action Owner	1. Click the user name in the **Owner** column for the workflow action you want to modify. 2. In the Select a User dialog, select the user you want to make the action owner. 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. 3. Click **Done** to close the dialog. 4. Click **Apply** to save your changes. **Note:** Changing an action owner directly in the workflow on this page only changes the owner for that particular action in that particular workflow. To modify or assign an owner for all actions with a specific function, see "Managing Workflows in Projects" on page 15.
Modify Review Deadline	1. Click the workflow action in the **Review Deadline** column. 2. Select a date.

4. Click **Apply** to save your changes.

To complete your action in a workflow:

You can complete a workflow action assigned to you in two different locations. Follow one of the procedures below to complete the action.

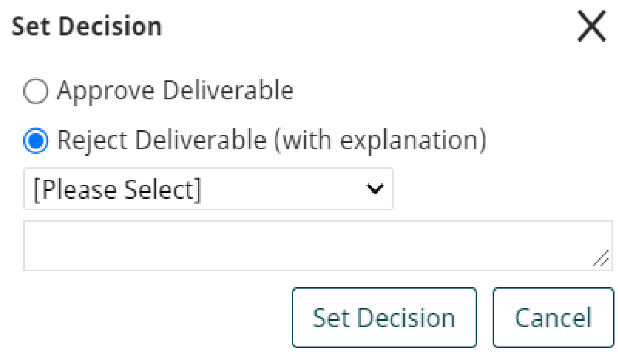
Location	Procedure
Work Pod (available on the My Work	1. From the **Workspace** menu, select **My Work**. Workflow actions display for associated deliverables and activities.

Location	Procedure
page)	Review the status and pending decision for each workflow action. - A decision has been made to approve the deliverable. - A decision has been made to decline the request to review the deliverable or document. - A decision has been made to reject the deliverable. 2. Click for the workflow action you are completing and select a decision. See below for decision type explanations. To skip a workflow action and move the workflow forward, click . Only actions defined within the workflow definition as being able to skip can be skipped. If the action has no owner, the action is skipped automatically. Once a decision is made and the workflow moves to the next step, your action is removed from the card.
Individual Project Deliverable	1. Display the project and select the **Stages** page to display all deliverables and activities in the current stage. You can also access all documents assigned to you across multiple projects using the My Work page available on the **Workspace** menu. 2. Click the name of the deliverable or activity that contains the workflow. Use the Workflow sidebar in the deliverable or activity details to view the current workflow status, including any items that require approval. Enter a decision here using the icon. 3. If you have the right to upload document versions, make sure you upload your final version before you enter your workflow decision. 4. In the action you are completing, click **Enter Decision**, and select a decision. See below for decision type explanations. 5. If authentication is required, enter your password in the **Set Decision** dialog box. 6. Click **Apply** to save your changes.

Workflow decisions determine whether the workflow continues to the next action or step, or whether it moves back to a previous action.

Select from the following decision options to complete your workflow action:

- **Approve deliverable** - A decision to approve the document takes effect after all action owners in the step have approved it or declined unless the step is labeled **Proceed after 1** decision, in which case the first approval sends the workflow immediately to the next step.



- **Decline request to review deliverable** - A decision to decline means that you have chosen to not complete your action. When there is only one action in the step and the action can be skipped (set in the workflow definition), the workflow advances to the next step. When there are other actions in this step, the other action owners enter their decisions, and your declining does not affect whether the deliverable is rejected or approved on this step. If there is only one action and it cannot be skipped, you cannot decline, and another owner must be selected for the action.
- **Reject deliverable** - A decision to reject the document and send it back takes effect immediately in every case, even if other action owners in the step have approved. Also select the rejection type.
    - Select **Continue** to record your rejection but allow the document to continue through the workflow. This option does not allow the document to be completed unless you withdraw your rejection. This option does not take effect until all action owners in the step have either approved or also selected to reject but continue.

      To successfully complete the workflow, a document that has been rejected but continued must be rejected by a later reviewer and returned to the person who rejected it originally. If the original reviewer accepts it, it can complete. But if the rejected document finishes the workflow without being sent back to change the original rejection, the document's status is reset to **Not Started**. In effect the document has been rejected.
    - Select **Back to (deliverable/activity) owner** to stop the workflow and return control to the document owner.
    - Select a previous step or action name to send the document back for rework or recheck by a previous owner.

      If there is only one action in the previous step, there is no difference between selecting the step or the action. If there are two or more actions in the step, and you select an action, the deliverable is sent back to that action owner only.

Enter an explanation if you selected **Decline request to review deliverable** or **Reject Deliverable**. The explanation displays and allows other action owners, document owners, or project team members to share insight into why the decision was selected.

A decision to reject the deliverable or activity and send it back causes the workflow to go back immediately in every case. A decision to reject the deliverable or activity and continue, or a decision to approve the deliverable or activity does not immediately move the workflow forward when there are multiple actions in a step, unless the **Proceed after 1** decision label is displayed or the decision is the last one to be entered in the step.

Notes:

- An activity workflow may not be able to start while the parent deliverable has a status of **Workflow in Progress** or **Completed**. This change applies to open projects if a workflow is currently stopped.
- As the Project Manager for the project or your manager directs, enter the time you spent working on your workflow actions using the Timesheet Entry screen.

Adding Workflows to Deliverables and Activities in Projects

Document owners can select a workflow to add to a deliverable or activity that does not have one defined within the process model, select a different workflow, or remove a workflow from a deliverable or activity within a project.

If a workflow was assigned to the deliverable or activity within the model, or if the workflow is in progress, document owners are not able to select a different workflow for the deliverable or activity.

A workflow added to a deliverable in the project is optional to complete. If the workflow was added in the model, completing the workflow is required.

To add or replace a workflow for a deliverable or activity:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Identify the deliverable or activity you want to add the workflow to and click the document name to display the document's details.
3. In the Contents tree, click **More Details** to display additional details about the deliverable or activity.
4. In the **Workflow** field, click , select an available workflow from the list, and click **Set Workflow**.
5. Click **Apply** to save your changes.

To remove a workflow from a deliverable or activity:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Identify the deliverable or activity you want to add the workflow to and click the document name to display the document's details.

3. In the Contents tree, click **More Details** in the upper left to display additional details about the deliverable or activity.
4. In the **Workflow** field, click and click **Clear Workflow** to remove the workflow from the deliverable or activity.
5. Click **Apply** to save your changes.

Notes:

- When a workflow is added to a deliverable in the project (as opposed to added in the model), its activities cannot be locked. That is, activity versions can always be uploaded even while the deliverable is in the workflow.
- If you add a workflow that you have used previously and it includes fewer or more activities than in a different project, the metric settings within the project could be determining which actions are included. Verify the workflow settings with your Accolade Administrator or Process Designer, if necessary.

Exercises - Add a Workflow to a Deliverable in a Project

Try out what you have learned!

- Open the deliverable in the project to which you want to add a workflow.
- Add a workflow to the deliverable by clicking .
- Assign action owners as necessary.

Delegating Your Workflow Actions

If you are unable to participate in the workflow, select someone else to complete your actions in your absence. You can delegate a single workflow action on the individual deliverable or activity, or from the Work pod, or if you are going to be unavailable or out of the office for a longer period of time, you can delegate all your actions for a period of time.

To delegate a single workflow action on the individual deliverable or activity:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.
2. Click the name of the deliverable or activity that contains the workflow.
3. In the Contents tree, click **Workflow** to display the workflow details.
4. In the **Owner** column of the action you want to delegate, click to select a different user.

   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.

5. Click **Done** to close the dialog.
6. Click **Apply** to save your changes.

To delegate a single workflow action from the Work pod:

1. From the **Workspace** menu, select **My Work**.
2. Ensure the Work pod is set to display deliverables and activities.
   - You can configure the Work pod to filter for deliverables and activities that have workflows by clicking and applying a filter.
3. View the workflow by clicking . If the workflow is in progress, click to view the workflow.
4. Click the user name in the **Owner** field for the workflow action you want to modify.
5. In the Select a User dialog, select the user you want to make the action owner.

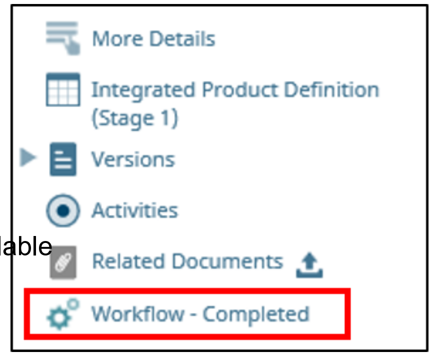
   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

   - 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.
6. Click **Done** to close the dialog.
7. Click **Apply** to save your changes.

Viewing Workflow History

Any user with access to the project can open a deliverable or activity and view the history of the workflow. Events are logged as the workflow progresses through its defined steps.

To review workflow history:



1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Click the name of the deliverable or activity that contains the workflow.
3. In the Contents tree, click the workflow to display its details.
4. Review the history in the **History** section.

   Click **Detail** to view the details of an event listed in the history.

   Workflow details can also be accessed directly from the **Stages** page by displaying the Has Workflow column, and clicking to link directly to the workflow details.

Notes:

- Report on workflow history using the RVP_WorkflowHistory reporting view. Workflow history can also be included in a PDF created from an automated workflow step.

Managing Workflows in Projects

A workflow is a design for how several people can cooperate to create and review a document. Document Owners, Project Managers, and Process Managers with Manage Process rights manage the workflows process, including:

- Assigning action owners.
- Starting the workflow.
- Stopping the workflow.
- Skipping workflow actions.

Workflow details can also be accessed directly from the **Stages** page by displaying the Has Workflow column, and clicking to link directly to the workflow details.

Assigning Workflow Action Owners

The owner of a specific workflow action in a project can be assigned or changed either directly within the project deliverable or activity or using the Work pod (available on the All My Work page). Action owners do not need to be members of the project team, but they must be assigned the Document Reviewer user role.

To assign an owner to an individual workflow action:

Location	Procedure
On the deliverable or activity	1. Display the project and select the **Stages** page to display all deliverables and activities in the stage. You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu. 2. Click the name of the deliverable or activity that contains the workflow. 3. In the Contents tree, click the workflow to display its details. 4. In the **Owner** field, click to select the user for the action. 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. 5. Click **Done** to exit the dialog. 6. Click **Apply** to save your changes. A setting in the workflow definition determines if you can assign the same user to multiple actions within the same workflow.
Work Pod (available	1. From the **Workspace** menu, select **All My Work**. 2. Ensure the Work pod is set to display deliverables and activities.

<table>
<tr><th>Location</th><th>Procedure</th></tr>
<tr><td>on the All My Work page)</td><td>
You can configure the Work pod to filter for deliverables and activities that have workflows by clicking and applying a filter.
<ol start="3">
View the workflow by clicking . If the workflow is in progress, click to view the workflow.
In the Owner field for the workflow action you want to modify, do one of the following:
If an owner is not assigned, click [None].
If an owner is assigned, click the existing owner's name.
Select the user you want to make the action owner.
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.
Click Done to exit the dialog.
Click Apply to save your changes.
</td></tr>
</table>

Directly assigning an owner to a workflow action only assigns the user to a specific action in that particular workflow. If a user needs to be assigned to all workflow actions that are related to a function, the assigned project manager (or a Process Manager with Manage Process rights) can assign ownership through the project's Team page.

Note: Changing an owner on the Team page assigns that user as the owner of every action that currently has the function and owner that are shown in the row. For example, if you change an individual action owner in a workflow, that user would not be replaced when you replace the user shown on the **Team** page because the function/owner combination is different in the workflow than on the **Team** page.

Workflow actions that are complete, or in a deliverable or activity that is complete, are not assigned the new owner if the update is made on the Team page.

To assign an owner for all workflow actions that are related to a specific function:

The options and display order on the **Team** page may differ between projects, based on the process model configuration. The procedure below follows the default configuration.

1. Display a project and select the **Team** page to display the current team members assigned to the project.

   If necessary, select **Detail View**.

   You can configure each section in the Team page to filter what displays, for example by stage or by function, and select which columns to view within each section. Save your selections to display each time you display the page.

2. In the **Workflow Action Owners** section, locate the function you want to assign a user to and do one of the following:
   - If an owner is not assigned, click **None**.
   - If an owner is assigned, click the existing owner's name.

3. In the Select a User dialog, select the user you want to make the action owner.

   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.

   Note: Depending on how the workflow is configured, the workflow action owner may be restricted to users with a matching function assignment.

4. Click **Done** to exit the dialog.
5. Click **Apply** to save your changes.

Starting Workflows

When a deliverable or activity is ready to have its assigned workflow started, the owner assigned to the deliverable or activity, the assigned project manager, or a Process Manager with Manage Process rights starts the workflow. Once a workflow is started and contains active steps, the workflow action steps display in the Work pod for action owners and project team members. If an automated step is the first step in the workflow, the automated step completes when the workflow is started.

Starting workflows is dependent on the following conditions:

- All actions that cannot be skipped must have an owner assigned.
- If the workflow is defined to have start conditions, metrics within the project must meet the defined conditions before the workflow can start.
- Depending on a setting in the model, a deliverable workflow may not be able to start unless all of its activities are set to **Completed** or **Not Required**, and an activity workflow may not be able to start while the parent deliverable has a status of **Workflow in Progress** or **Completed**. To start a workflow that is blocked by the status of another document, you can change the status of the blocking document (if it is not in a workflow), or allow the workflow to complete (if the document is in a workflow), or stop the workflow and then change the status.

To start a workflow:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Click the name of the deliverable or activity that contains the workflow.
3. To start the workflow, do one of the following:
   - In the Contents tree, click the workflow to display its details and click **Start Workflow** in the lower right corner of the middle pane.
   - Click **Start Workflow** in the right workflow pane.

Stopping Workflows

A workflow might need to be stopped, for example, if the document is no longer needed at the gate meeting or if the workflow needs to be completely reorganized for successful completion. When a workflow concludes successfully, it stops automatically. The owner assigned to the deliverable or activity, the assigned project manager, or a Process Manager with Manage Process rights can stop the workflow.

If a workflow is stalled due to a team member's unavailability, consider delegating the workflow action instead of skipping it.

To stop a workflow:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Click the name of the deliverable or activity that contains the workflow.
3. To stop the workflow, do one of the following:
   - In the Contents tree, click the name the workflow to display its details and click **Stop Workflow** in the lower right corner of the middle pane.
   - Click **Stop Workflow** in the right workflow pane.

Skipping Workflow Actions

If an action for a workflow is not required for a particular deliverable or activity, the action can be skipped to move the workflow forward. Only actions defined as being able to skip within the workflow definition can be skipped, and if the action has no owner, the action is skipped automatically.

The workflow action owner cannot skip an action that they own. However, they can decline the review to move the workflow forward.

To skip a workflow action:

Location	Procedure
On the deliverable or activity	1. Display the project and select the **Stages** > page to display all deliverables and activities in the stage. You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu. 2. Click the name of the deliverable or activity that contains the workflow. 3. In the Contents tree, click the workflow to display its details. 4. Click **Skip** in the appropriate action row.
Work Pod (available on the All My Work page)	1. From the **Workspace** menu, select **My Work**. 2. Ensure the Work pod is set to display deliverables and activities. • You can configure the Work pod to filter for deliverables and activities that have workflows by clicking and applying a filter. 3. Navigate to the appropriate deliverable or activity, and click to skip the workflow action. 4. Click **Apply** to save your changes. The skipped action displays after you apply your changes.

Notes:

- An assigned document owner has the right to replace action owners while the workflow is in process, but not to upload a new version of the document while the workflow is in process (unless the owner also owns the current action).
- If a workflow was added to a document in the model, the workflow must be completed before the document can be assigned the Completed status. If the workflow was assigned to the document in the project, the document can be assigned the Completed status without completing the workflow.

Building Workflows to Complete Deliverables and Documents

Administrators and Process Designers create workflows and add them to the Template Library and to models as necessary. Workflows added to the Template Library are available to add to a deliverable or activity at the process model level, and at the project level. Workflows added to a model are required before a deliverable or activity's status can be set to **Complete**. Workflows added at the project level are considered optional and do not require completion prior the deliverable or activity's status being set to **Completed**.

Workflow Best Practices

Keep the following set of best practice recommendations in mind when designing and building workflows:

- **Communicate Workflow Changes to Project Teams** - If changes are required to a workflow that is saved in the Template Library, communicate those changes to the project teams. Changes made to a workflow are not reflected in workflows that are in process within a project. The workflow must be stopped for the changes to take effect.
- **Project Level Changes Sometimes Take Precedence** - Changes to the numbers of days for an action completion and the owner assigned to an action within a step are not overridden at the project level if changes have been made there.
- **Use Workflows for Document Review Cycles** - Workflows are an excellent method to track a document through a review cycle. For example, if the document needs to go through a series of peer reviews prior to the senior manager on a project reviewing it.
- **Create Smart Workflows** - Smart workflows contain separate sets of metric conditions that determine the following for the workflow:
  - If the actions within a workflow step are included or excluded with the project. See "Adding Conditions That Determine Workflow Actions Availability" on page 29.
  - When a workflow can start. See "Creating Workflows" on page 23.
  - If a project is migrated to one or more other models after the workflow is completed. See "Migrating Projects After Workflow Completion" on page 32.
- **Create Master Workflows** - Using Smart workflows that contain rules that determine whether workflow actions are included in the workflow, you can create one or more master workflows for use across multiple projects.
- **Automate Your Workflows** - Use automated steps within your workflow configurations to save your project teams time and manual entry, and to ensure artifacts are recorded and saved for audit purposes.

Creating Workflows

Administrators and Process Designers can create workflows to design how several people can cooperate to create and review a deliverable or activity. Steps and actions within steps can be added to the workflow for each primary part of the workflow process.

To create a workflow:

1. From the **System** menu, select **Collaboration & Groups > Workflows**.

   To narrow the workflow list, search by the workflow name or system name.

2. Do one of the following:
   - **To add a new workflow** - Click **Add New** in the upper right corner of the page.
   - **To edit an existing workflow** - Click the name of the workflow to open it for editing.

     Edits made to an existing workflow are applied to the workflow in a project if the workflow has not started, or when a workflow in progress is stopped.

3. Complete the following information to identify and describe the workflow:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the workflow.
System Name	Enter a unique, shorter name that identifies the workflow in queries, reporting views, field codes, and other places in Accolade. The name must be unique among workflows and can contain only letters (English alphabet), numbers, and the underscore.
Description	Enter a description of the purpose or nature of the workflow. This description helps other users identify the workflow throughout the system.
Category	Enter or select the group to which this workflow belongs. Use categories to organize like workflows together. For example, you may choose to group all the workflows used for financial approvals, in order to separate them from workflows that are used for different purposes. • Leave this field blank to add to the **Default** category. • To define a new category, select **New Category** and enter the category name. • To delete a category, remove every item from the category. Empty categories are deleted automatically.
Active	Select the check box when the workflow is ready to use in projects.
Users cannot own multiple actions	Select the check box to ensure that a single user cannot be manually assigned to multiple actions in a workflow.

Field	Description
	If a user is assigned to an action, their name is not available for selection as an owner for other actions within the workflow. **Note:** Existing repeated workflow action assignments are not affected if you select this setting after a workflow is created. Assignments for workflow actions on the Team page of a project supersede this setting.
Start Conditions	Click to add metric conditions that determine when a workflow can start. Using start conditions helps to ensure that an approval flow does not start before the defined conditions within a project are met. The **Start Workflow** option within the project is disabled until the project's metric settings meet the defined conditions. Click , select a metric to include as a condition, and click **Select**. Use the **Category** and **Search** options to refine the list of metrics. For the added metric, select or enter the value the metric must meet within the project before the workflow can start. Add additional metrics, as necessary.
Migration Map Rules	Click to add metric conditions that determine if a project migration occurs using the selected map when the workflow is completed.

4. Click **Create** to create the new workflow or **Apply** to save changes to an existing workflow.
5. On the **Steps** tab, add manual or automated steps to the workflow process, for example, to create PDFs or to set gate dates automatically.

   You can also add conditions to determine workflow actions availability or set up automatic project migration after a workflow is completed.
6. *(Optional)* On the **Security** tab, follow the instructions listed in "Restricting Configuration for Workflows" on page 30 to configure access group restrictions.
7. *(Optional)* On the **Security** tab, click **Process Model Usage** to see the list of process models that the workflow is associated with. The list includes all process models the workflow is included in, as well as links to the process model's component tree pages you have Edit access to.

Adding Steps to Workflows

Workflows consist of a series of steps that mark each primary part of the workflow process. For example, a step can represent a single person's review and approval within a chain of reviews that must happen in order (peer review, team leader approval, and department or higher level approval). Each step contains one or more actions that indicate something that an action owners needs to complete to accomplish the step. Each action includes an owner and a time frame, and can contain other details.

Add multiple actions to a step to enable several people to work on the deliverable at the same time.

Workflow actions can also include conditions that determine if they are included within the workflow in a project based on metric values with the project.

To add manual steps to a workflow:

1. After creating the workflow, click the **Steps** tab, click **Add Step** in the lower right corner of the page, and complete the following information to identify the manual step:

Field	Description
Step Name	Enter a name that identifies the workflow step. This name displays to users in the project.
Step System Name	Enter a unique, internal name the system uses to identify the workflow step. The system name must be unique across all workflows.
Proceed after 1 Decision	Select this check box if the first approval or "reject but continue" decision in a multi-action step moves the workflow forward to the next step without waiting for other reviews. If this check box is not selected, the workflow does not move to the next step until all reviewers in a multi-action step have responded. The first decision to reject and send the workflow back sends the workflow back to the step that the reviewer selects whether this check box is selected or not.

2. Add action details necessary to complete the step:

Field	Description
Action Name	Enter the name of the action performed during this step. Workflow steps must have at least one action. To add additional actions to a step, click **Add Action**.
Action System Name	Enter a unique, internal name the system uses to identify the workflow action. The system name must be unique within the step.

Field	Description
Description	To add additional details about the action in a step, enter any additional notes.
Function	*(Optional)* Select the job function that the owner of this action should have. To enforce user selection based on function for all deliverables, activities, workflow actions, and gatekeeper selections, use the **Enforce on user selection** option for the model available on the Pages & Layouts tab within the model editor. Select this check box to limit the selection of users to those who have the function defined. Selecting this option disables the ability to change the function for the workflow action and is enforced even if the function is inactive.
Owner	*(Optional)* Click to select the user who owns this action. 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. If an action has no owner, no replacement owner can be selected for the action in the project after the workflow has reached the step containing that action. However, if an action does have an owner selected, a different owner can be selected for the action even after the step has started. Changes to the **Owner** field are not propagated into existing projects and can only be made by the deliverable owner, Project Manager, and Process Manager at the project level for workflows in existing projects. Only users assigned the Document Reviewer role are available for selection as an action owner.
Permissions	Select what the owner can do in this workflow step: • **Can Edit and Publish** - The owner can upload and publish a version of a deliverable or activity associated with the workflow for other Accolade users. • **Can Edit** - The owner can upload, but not publish, a version of a deliverable or activity associated with the workflow.

Field	Description
	• **Can Approve** - The owner can approve the action in the step for the workflow to move forward, but cannot upload or publish a deliverable or activity. Select the **Can Skip** check box if the action can be skipped when there is no owner assigned. If the step contains a single action with no owner, the step is skipped as soon as the step is reached in the workflow process. If the step contains multiple actions, some of which contain owners, the step is not skipped immediately, and the deliverable owner is able to select an action owner during the step.
Auth Req*	Select this check box if the owner of this action must enter authorization credentials to enter a decision on the action.
# Days	Enter the number of days from the start of the step until a decision is due. A notification email is sent to the action owner after this time has elapsed. Document owners, Project Managers, and Process Managers can update the number of days within the workflow in a project. In the project, a step lasts until the required decisions have either sent the workflow to the next step or returned it to a previous action, step, or the deliverable owner. Changes to the **# Days** field are not propagated into existing projects and can only be made by the deliverable owner, Project Manager, and Process Manager at the project level for workflows in existing projects.
Conditions	Click to add metric conditions that determine if an action is included within the workflow in a project.

* If your workflow settings require re-authentication, and your Accolade implementation runs in a Windows Authentication environment (not Single SIgn-On), consider changing the Authentication Provider on Accolade.Asp under the RemoteAuth directory in the main website to NTLM only. Redirect all hostname traffic to the fully qualified domain name of your server in IIS. This ensures consistency in the workflow behavior across all supported browsers.

3. Repeat steps to add additional steps to the workflow.
4. Click **Apply** to save your changes.

To add automated steps to a workflow:

Note: Automated workflow steps should follow the step that activates the automation upon completion. If an automated step is the first step within a workflow, it activates when the workflow starts. If an automated step is the last step within a workflow, the step completes the workflow.

1. After creating a workflow, click the **Steps** tab, click **Add Automated Step** in the lower right corner of the page, and complete the following information to identify the automated step:

Field	Description
Automated Step Name	Enter a name that identifies the automated workflow step.
Automated Step System Name	Enter a unique, internal name the system uses to identify the workflow step. The system name must be unique across all workflows.

2. Add action details necessary to complete the step:

Field	Description
Automated Action Type	From the drop-down list, select the automated action that occurs during this step: • **Set Gate to Today's Date** - Select this option to automatically set the gate date to the current date when the previous step within the workflow is completed. If the workflow is in a stage that does not have a gate, the automated step is skipped. • **Generate PDF from Template** - Select this option to automatically generate a PDF that is published as a deliverable or activity version. A deliverable or activity can contain a template assigned to the deliverable or activity, or a template that is assigned specifically to use for generating a PDF from a workflow step. Select which template to use for the PDF generation. • **Set Gate Decisions** - Select this option to automatically set the gate decision for the upcoming gate based on the calculation of metrics set in the project. • **Publish Latest Document Version** - Select this option to automatically publish the latest version of the deliverable or activity, thus updating metric values on the project, which provides gatekeepers visibility into the approved metrics. The automated action updates metrics based on the update rights of the previous workflow action owner. If there is no version available, the workflow history indicates no action was taken.
Automated Action System Name	Enter a unique, internal name the system uses to identify the workflow action. The system name must be unique within the step.
Conditions	Click to add metric conditions that determine if an action is included within the workflow in a project.

3. Click **Apply** to save your changes.

Notes:

- To reorder steps in the workflow, click on the arrows next to the name to move the step up or down.

- To delete a workflow step, delete all the actions within the step using the next to each action. To delete an entire workflow, display the workflow, ensure that is currently inactive, and click **Delete**.
- Updates to a workflow such as adding steps and actions and making changes to **Permissions** and **Can Skip** fields are not copied into the project if a workflow is in progress, but are added when the workflow is stopped and restarted.

Adding Conditions That Determine Workflow Actions Availability

Workflow actions can include a set of conditions that determine if they are included within the workflow in a project based on the metric values set within that project. Use "smart" workflows if you want to define one or master workflows for use across multiple projects.

Process Designers can add the "smart" workflow to one or more models, and the metrics within the conditions in the workflow are automatically associated to the model. Document owners can select a "smart" workflow to add to a deliverable or activity within a project. If the metrics within the workflow are not part of the project, the workflow ignores the conditions and the actions *are* included in the workflow. Workflow actions with no conditions defined are always included with the workflow.

EXAMPLE Example

Your company may have a workflow for budget proposals for projects or portions of projects. You may choose to show or hide an action requiring someone's review and approval depending on the total amount in the budget proposal. Smaller amounts may not require a higher level of management or corporate approval, and the reviewers of a proposal across regions may vary.

In this example, define metrics that reflect the budget proposal amount and the region set for the project. Depending on your setup, these may be calculated metrics based on other values. Within the workflow action configuration, define conditions that include the region and budget proposal metrics and the values required for the action to be part of the workflow.

To add a condition that determines a workflow action's availability within a project:

Note: Prior to adding a workflow condition, determine the metric names and values to use to create the conditions that show a workflow action.

1. From the **System** menu, select **Collaboration & Groups > Workflows** and select the workflow, or create a new workflow.
2. Ensure the **Is Smart** option is selected, and create workflow steps as described above.
3. If necessary, click the **Steps** tab to display the steps and actions defined for the workflow.

4. In the **Conditions** field for a manual or automated action, click **Add New**.
5. Click , select a metric to include as a condition, and click **Select**.

   Use the **Category** and **Search** options to refine the list of metrics.
6. For the added metric, select or enter the value the metric must meet within the project for the action to be included within the workflow.

   If the project's metric setting does not meet this value, or the project does not include the metric, the action is not included in the workflow within the project.
7. Repeat step 4 to add additional conditions that must be met for the workflow action to show.

   If multiple conditions are entered, all conditions must be met for the action to be included in the workflow within the project. If conditions dictate that no actions are needed to complete the workflow, the workflow automatically runs to completion and displays in the associated deliverable and workflow history as **Completed**.

   To edit a condition, click to delete it and repeat step 4.
8. Click **OK** to return to the workflow steps.
9. Click **Apply** to save your changes.

Restricting Configuration for Workflows

Restrict who can view and edit workflows by assigning the workflow to one or more access groups. Process Designers with matching access group permissions set in their user profile will be able to view or edit the workflow.

Note: The access groups that display for selection are based on your access group permissions as defined in your user profile. Additionally, access group settings for the workflow must match the user permissions of other Process Designers in order to display for them.

To restrict workflow configuration:

1. From the **System** menu, select **Collaboration & Groups > Workflows**.
2. Do one of the following:
   - **To add a new workflow** - Click **Add New** in the upper right corner of the page and create the workflow.
   - **To edit an existing workflow** - Click the name of the workflow to open it for editing.
3. Click the **Security** tab to display the configuration access group settings.
4. Select the access group(s) to which this workflow belongs.

   The access group(s) displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. However, parent access group information is visible for access groups to which you have View permission.

The workflow is selected to the highest level access group listed by default. Note that the workflow is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

Process Designers with matching access group permissions will be able to navigate to and edit the workflow, depending on their individual access group permissions.

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

Exercises - Create a Workflow

Try out what you have learned!

- Create a workflow.
- Add start conditions based on one or more metrics that determine when the workflow can start.
- Add steps multiple steps to the workflow and actions within the steps.
- Add an automated step.
- Associate the workflow to a Process Model.

Setting Gate Decisions Using Workflows

Workflows can include an automated step that sets the decision for the upcoming gate based on metric values set within the project. The decision for the gate is automatically set according to the metric conditions set within an automated step for each decision type, removing the need for manual entry of gate decisions or gatekeeper voting.

Note: Process models can also be configured to automatically set a gate decision based on a set of metric conditions. Sopheon recommends using the **Automated Gate Decision Rules** settings within the process model or a workflow automated step to automate gate decisions, but not both.

When a workflow reaches the automated step to set the gate decision, Accolade processes the decisions in the following order and sets the decision to the first one that matches the metrics assigned:

- Go
- Kill
- Hold
- Recycle
- Pending Decision

Gate decision names, such as **Go** and **Hold** are fully customizable and may differ for your Accolade installation. See your company's Process Designer for the names your company uses for these decisions.

A Conditional Go decision cannot be set using an automated gate decision and event reasons are not captured for automated gate decisions.

Setting gate decisions to set automatically does not prevent a gate owner from entering a decision manually and updating gate details. To ensure that gate details are not modified after setting the gate decision, consider setting the gate data to read-only using the **Set Gates Page to read-only** option in the process model.

Each workflow can have only one automated step that sets the gate decision. An automated gate decision step does not prevent steps after it from running. Additionally, if a project is set to require gatekeeper approval to pass a gate, the gate decision is set to Proposed.

To set a gate decision using an automated step in a workflow:

Note: Prior to adding a gate decision automated step, determine the metric names and values to use to create the conditions that set each decision type.

1. From the **System** menu, select **Collaboration & Groups > Workflows** and select the workflow, or create a new workflow.
2. If necessary, click the **Steps** tab to display the steps and actions defined for the workflow.
3. Click **Add Automated Step** and select **Set Gate Decision** as the automated action.
4. For each gate decision listed, click the gate decision link and complete steps 5 to 7.
5. Click , select a metric to include as a condition, and click **Select**.

   Use the **Category** and **Search** options to refine the list of metrics.
6. For the added metric, select or enter the value the metric must meet within the project for the gate decision to be set, and click **OK**.
7. Repeat step 5 to add additional conditions that must be met for the decision to be set.

   If multiple conditions are entered, all conditions must be met to set the gate decision.

   To edit a condition, click to delete it and repeat step 5.
8. Click **OK** to return to the workflow steps.
9. Click **Apply** to save your changes.

Migrating Projects After Workflow Completion

Workflows can include rules that migrate a project to a different model after the workflow has been completed and approved. When the workflow is completed, Accolade uses the metric settings and the workflow migration rules set in the workflow configuration to determine which migration maps to use and automatically migrates the project. Automating project migrations using workflow migration rules removes the need to manually migrate a project after a workflow has been completed.

Consider the following when configuring a workflow to start a project migration:

- Only approved workflows can start a project migration. Workflows that are completed but rejected do not start the migration.
- A single workflow can contain multiple rules that result in a single project being migrated multiple times.

- All other workflows in the project are stopped when the project migration starts. Ensure that your configure is set correctly so that workflows that contain finish conditions, such as setting gate decisions, are not stopped before those events take place.
- If a migration map is set to close the original project after the migration, all migrations complete before the original project is set to Closed.
- If a migration map does not contain the correct model setup, the migration does not complete.

To migrate a project after a workflow has completed:

1. From the **System** menu, select **Collaboration & Groups > Workflows** and select the workflow, or create a new workflow.
2. In the **Migration Map Rules** table, click , enter a unique name and system name to identify the rule, and select the migration map that Accolade uses for the automatic migration.
3. Click on the **Conditions** to define the metric conditions that must be met to migrate using the selected map.
4. Click , select a metric to include as a condition, and click **Select**.

   Use the **Category** and **Search** options to refine the list of metrics.
5. For the added metric, select or enter the value the metric must meet within the project for the workflow approval to trigger the migration, and click **OK**.

   Repeat as necessary to add additional conditions that must be met for the workflow to start the project migration. If multiple conditions are entered, all conditions must be met for the project to migrate.
6. Repeat steps 2-5 to add migration rules for other migration maps.

   You can define multiple rules for the same migration map.
7. Click **OK** to return to the workflow configuration.
8. Click **Apply** to save your changes.

Notes:

- To delete a migration rule, click next to the rule in the **Migration Map Rules** field.

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