Sopheon Accolade®

Idea Generation 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.

Accolade User Roles

- Administrator
- Process Design*
- Idea Manager
- Project Managers
- Project Team Member

*For configuration and setup.

Terms and Concepts

- General Accolade terminology and concepts
- Projects

Related Training Modules

- Custom Pages
- Understanding Projects
- Managing Projects

Gather Innovative Ideas Overview

Use the Accolade idea gathering components to systematically capture new ideas for evaluation using a gated or non-gated process and possibly a project team. Using the same process to evaluate product and service ideas allows for an objective assessment and identification of ideas with the greatest potential for your business. Use Accolade to collect and manage ideas for new products, services, internal process improvements, cost saving initiatives, and more that have the greatest impact potential for your business.

After an idea is submitted and evaluated, Idea Managers can move qualified ideas directly into product development by migrating the project to a product development process model. In addition, ideas can be integrated into longer-term planning strategies using Accolade Innovation Planning and Accolade Roadmapping to determine and manage their best time to market.

Gathering Ideas in Accolade

Ideation provides new methods to setup and gather ideas within Accolade using page layouts to create idea campaigns. Page layouts provide a means to create an engaging experience and a setup that is easier to manage. Administrators and Process Designers complete the following to setup ideas:

- Design idea campaigns to group and gather ideas. If you choose to use campaigns, the campaign includes the page layout and a gated or non-gated model that is setup as a portfolio for the campaign. For example, you may create a campaign for ideas around a specific product or service, or create a general campaign that is open to your internal users for internal process improvements.
- Determine which employees evaluate and manage ideas from submission through to conversion to a development project and ensure they are assigned the Project Manager or Idea Manager role.
- Determine who has access to campaign projects at your company.
- Create a process model that projects use that are created when an idea is submitted from the campaign. This can be a gated, non-gated, or idea model. Use an idea model if you want to leverage the Idea Submission functionality (such as the Idea Manager user role) from previous Accolade releases.

Setting Up Idea Campaigns

Idea campaigns are specific efforts that your company puts forth to gather ideas around products or initiatives. The campaign offers a single entry point that provides idea submitters information about the call for ideas. Within Accolade, the campaign is a portfolio project that contains all the ideas submitted for that campaign.

Administrators and Process Designers set up the components used to create both the campaign project and the projects created for ideas submitted for the campaign. The following setup is required:

- Determining campaign access (Administrators)
- Designing campaign and idea project layouts (Administrators, Process Designers)
- Creating a model for the ideas submitted to the campaign (Process Designers)
- Creating a model that establishes the portfolio project for the campaign (Process Designers)
- Creating the campaign project (Process Managers with Add Project rights)

Campaign Access

As your company is designing campaigns, consider who has access to the campaign while it is open for idea submissions and who has access once the campaign is closed. Administrators can set access up using access groups. While a campaign is in the idea collection stage, the campaign's access group may be accessible to all Accolade users, so all users have access to the campaign project to submit and discuss ideas. When a campaign is closed to new ideas and has moved to an evaluation stage, Administrators can remove access to all users except the campaign manager and those associated with evaluating the campaign.

Campaign and Idea Project Page Layouts

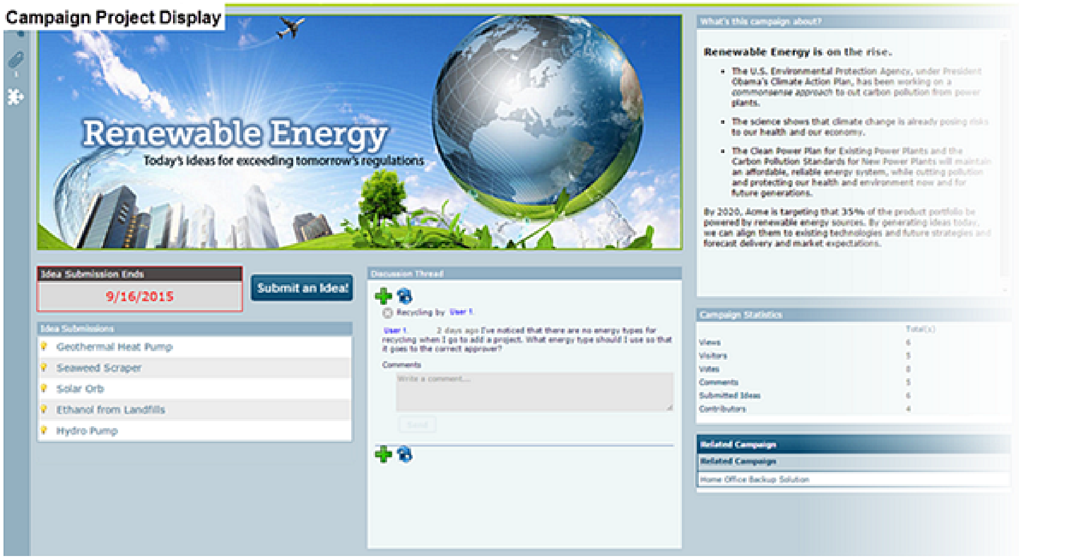
The design of a campaign begins with a page layout that can contain any pod elements you like. Each layout used for campaigns must contain a **Create Child Project** pod to provide the ability to create a new project from the campaign. A layout used for a campaign typically includes:

- An image pod.
- A metric pod that contains a long string metric to display a message about the purpose campaign.
- Other metrics such as to select a geographic area or to display a deadline date for idea submissions.
- (Required) Create Child Project pod.

A campaign may also include:

- A portfolio project list pod to display the ideas already submitted to the campaign.
- A voting pod to enable voting on a campaign before it is opened for idea submissions.

EXAMPLE Example



The above idea campaign layout includes an image pod, portfolio project list pod, various metric pods that contain date and long strong metrics, quick grid pod, discussion pod, and global link pod.

Administrators and Process Designers can create a single layout that is used for all your campaigns, so each campaign contains the same elements, or define as many layouts to use for campaigns as needed.

In addition, the model used to create the project for ideas submitted to a campaign may require a layout. For example, if you want to add a voting mechanism for a project created from an idea campaign, you can add that to a page layout using a voting pod. You can create a single layout for all idea projects, or define as many layouts as needed.

Models for Ideas Submitted to the Campaign

Each campaign requires a default portfolio model that tells Accolade which model to use for projects created from that campaign. The default model can be a gated, non-gated, or an idea model.

Process Designers should consider the following when defining these models:

- Name the model so it is identifiable when selecting it from the campaign model (described below).
- Use an idea model to leverage the other idea functionality (if enabled) within Accolade, such as:
  - Email notifications when an idea is submitted.
  - Ideas that Accolade users submit from the campaign display in the Work pod on the **My Work** page, available from the **Workspace** menu. Ensure the Work pod on this page is configured to display Ideas.
  - Ability to use the Idea Manager user role for projects created for submitted ideas.

- Ability to leverage existing idea forms and idea models if your company used Idea Submission in prior versions of Accolade. When setting up campaigns, the form on the idea model is disregarded.

- Use calculated metrics and the **Default Project Manager** setting to route submitted ideas to an assigned Accolade user. Select an individual Accolade user, or a user determined by one or more metric selections when the idea is submitted. Using a metric enables automatic routing of ideas, concepts, and projects to the correct business leader based on criteria for the project such as business area, product line, or geographic location.

  Example

  For example, your company uses one process model to manage their global projects.

  To automatically route newly created projects to different managers based on a geographic selection, set up two metrics:

  - A cascading list that is available at project selection to select the country, state or province, and the city when creating a project or submitting an idea.
  - A calculated metric using one of the following methods that defines the user who is set as the manager for each city:
    - Using a number metric:

      The following calculated metric sets the default project manager to the user whose ID is **3** if **Paris** is selected as the city when the project is created, and to the user whose ID is the original creator of the project if **Paris** is not selected.

      ```
      if({*METRIC:city*}='Paris', 3, ProjectCreatedByID())
      ```

      Run a report including the **User Name** and the **System User ID** columns to determine a user's ID within Accolade.

    - Using a string metric:

      The following calculated metric sets the default project manager to the user whose Login Name is *'domain\admin user'* if **Paris** is selected as the city when the project is created, and to the user whose User Name matches the Login Name if **Paris** is not selected.

      ```
      if({*METRIC:city*}='Paris', 'domain\admin user', ('domain\\'
      + ProjectCreatedByName()))
      ```

  Ensure the metric selections assigned to the model are editable on project creation, and that the metric that selects the Project Manager is set to not show within the project.

- Add a layout to the model that includes a voting pod to gather Accolade user voting data on individual ideas.

Campaign Models

The campaign model is the model that Process Managers with Add Project rights select when they create a campaign project. This model determines components such as the metrics shown for creation and within a portfolio project list, the layout used to present the campaign, and the model used for ideas submitted to the campaign. Ensure those items are set appropriately for what displays in the campaign.

> Before creating the campaign model, ensure that you have the default portfolio model created (as described above), and a page layout designed for the campaign to add to the model.

A campaign model must meet the following requirements:

- Be based on a class that has the **Is Portfolio** option selected and **Gated** or **Non-Gated** set as the process type.
- Use stages and gates with clearly defined names, such as Community or Gathering for the stage when the campaign is open for idea submissions, and Evaluation for the time when campaign managers are reviewing ideas.
- Have a model selected in the **Default Portfolio Model** field. This is the model that is used to generate projects for ideas submitted to campaigns based on this model. This can be a gated, non-gated, or an idea model.
- A layout, as described above, that represents the campaign assigned in the **Visible** field. To make the layout the default page that displays when a user accesses the project, select the layout as the landing page.

The pages you choose to include in the model for the campaign display when Accolade users access projects that represent the campaign. Process Designers can choose to include the project pages necessary to configure a project and then hide them after the project is created. Consider the impact that has on other campaigns that use a model.

See the Creating Gated and Non-Gated Process Models topic in the online Help for information about creating gated and non-gated models.

Campaign Projects

After the models are set, a Process Manager with Add Project rights creates the project that represents a specific campaign. Within that project, the Process Manager or assigned Project Manager can add images and other information to populate the campaign as it should display to idea submitters.

Available Pod Types

Page layouts can contain one or more pods to display information. Each pod can contain a single element, such as one metric, one global link, or one image. Review the following information about the types of pods available and their potential uses.

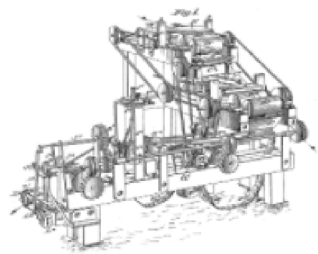
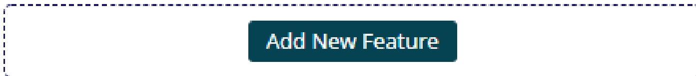
<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td>Advanced Platform</td><td>
Adds a pod to save JavaScript and HTML files to execute functions and features in a layout at a global or project level.
The editor options will not display until the pod is added to the layout and the layout is saved.
To add or write a JavaScript file or HTML file select from the following options:

To add an existing file - Click to open the editor dialog and click to upload the desired HTML or JavaScript file. Click Open to add the file.
To edit an existing file or create a new file - Click to open the JavaScript editor, write or update the code for the file directly in the editor, and click Save or Save and Close.

Click in the editor to launch the WebAPI help.
Click to delete the JavaScript file or HTML file. Selecting a different pod type will remove JavaScript and HTML files. Download and save the files before making changes to the pod.
Note: If Available to Mobile is checked on the layout settings, the Advanced Platform pod will not be available for selection in the pod type drop-down.
</td></tr>
<tr><td>Buttons</td><td>
Adds a button to a layout, such as a button within a portfolio that can be clicked to directly create a new project or project links.
Enter the name of the button in the Button Text field when creating the pod.
Select from the following options:

Add New - Creates a button that, when added to a global or project page layout, can be clicked to create projects and/or project links directly from the page. Click when defining the pod to select a process model and process links as necessary. Note that project links cannot be created for pods used on a global layout.

EXAMPLE Example
</td></tr>
</table>

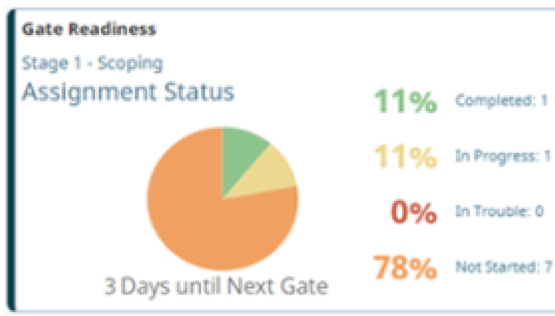
Pod Type	Notes
	  Multiple Add New pods can be used on a layout, each with different combinations of process models and link types. • **Create Child Project** - Creates a button that, when added to a project page layout, can be clicked to create a new project directly from the page. EXAMPLE Example  **Note:** The **Create Child Project** button is part of Ideation. The ability to add a new project using the **Add New** or **Create Child Project** button on a project page requires Add Project rights for the default access group (if one is assigned) or for the parent project's access group (if there is no default access group specified).
Chart	Adds a pod that contains a chart created using Accolade. Charts are visual representations of the data within a report.

Pod Type	Notes
	In order to add a chart to a pod, the chart must be set as **Available to Configuration** and the chart access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the chart to be available for them to use in the layout. Viewing a chart's contents within a page layout does not require Reporting Rights; however, a user must be an owner or have at least one matching user role for the chart to display.
Documents	Adds a pod that contains document types pertaining to a single project when the layout is included as a page within a project. The **Gate Documents** selection includes a pod that contains gate documents that display on a project. Gate owners and those with appropriate editing rights can upload and download versions, download and edit the associated template, and select which version to publish. If a layout containing a gate documents pod is assigned to a specific gate, the associated gate documents display. If the layout containing the gate documents pod displays as a project page, the gate documents specific to the current project gate display. EXAMPLE Example  **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected.
Gates	Adds a pod that contains gate information and capabilities for users on project teams. **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected. Select from the following options: • **Gate Readiness** - Provides a graphic that indicates the health of a project stage, to help determine at a glance how ready the project for an upcoming gate meeting. The pod includes the how many days until the next gate meeting and a status of the assignments with the current stage. Deliverables and activities are grouped together and considered "assignments" in this pod, and any item set to Not Required in the project is not included in the

<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>

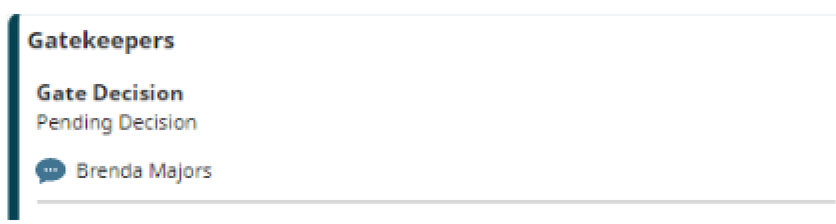
calculations. Deliverables set to In Trouble and Not Started are represented by a red and grey pie slice respectively.

Example



- **Gatekeepers** - Provides a place for various gate-specific information to be displayed. Gate owners can manage and update gatekeeper assignments as necessary from this pod. Additionally, gatekeepers can vote on gate decisions if gate voting is enabled, and can add or update comments regarding gate decisions. Gatekeeper votes and comments display as read only for others on the team. If gatekeeper skipping is allowed for the gate, gate owners can skip any gatekeeper vote decision.

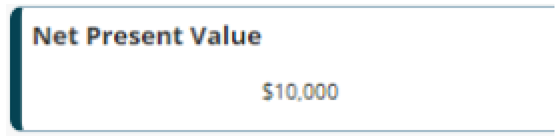
Example

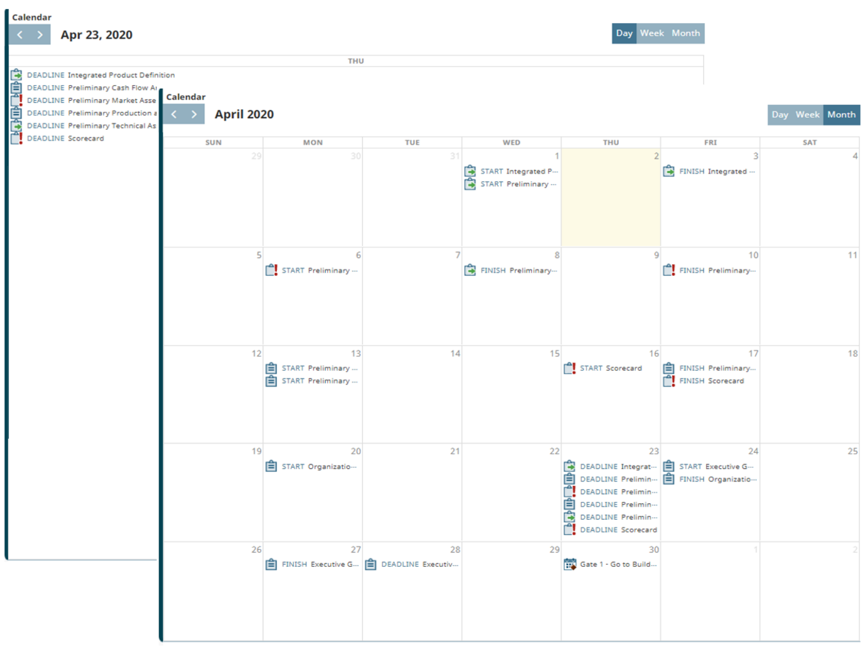


- **Meeting Dates** - Adds a pod that displays meeting information for a project. Gate names display with the meeting date below it. Users with rights to change gate dates such as Process Manager, Idea Managers, or Project Managers can edit meeting dates directly in the pod. All users on a project can see meeting information centrally located in this pod. Additionally, the gate name takes users to the corresponding gate page when clicked. Click when defining the pod to set the number of columns the meeting information displays. The pod information wraps from left to right across the pod to populate the columns set. Meeting date calculation settings and restrictions still apply.

</td></tr>
</table>

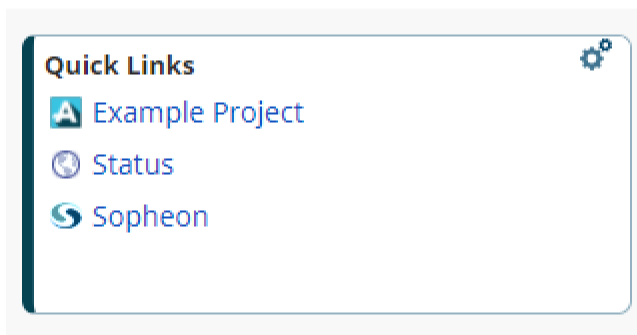
Pod Type	Notes
	Example 
Global Links	Adds a pod that displays the content of a global link, such as an intranet page, a Dashboards for Accolade report, or a planning view from Innovation Planning. Based on your server setup, only defined http, https, and relative file global links are available to add to a pod. **Important!** Accolade respects web browser and web page security features for embedded global links. The linked web page may include certain security settings that prevent the web page from loading within the Accolade application window. If you select an Innovation Planning view defined as a global link to display in a pod, and the layout is intended for use within a project page, select the **Filter to project** option to display the view filtered to the project ID saved as part of the global link configuration. **Note:** The filter functionality does not apply to composite planning views.
HTML Report	Adds a pod that displays the content of a specified HTML report. Available HTML reports display in the **Content** field. In order to add an HTML report to a pod, the report access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the report to be available for them to use in the layout. Viewing a report's contents within a page layout does not require Reporting Rights, however, a user must be an owner or have at least one matching user role for the report to display.

Pod Type	Notes
Metric	Adds a pod that can contain a single metric and displays the currently assigned metric value. Metrics within pods display as read-only. Example  To include the metric's name, add the name as the title of the pod. **Important!** Long string metrics with the **Rich Text** check box enabled cannot be added to pods.
Planning View	Adds a pod that displays a planning view from Innovation Planning in read-only format to any user who does not have the Planner role. Click when creating the pod to define the planning navigation options that are displayed within the pod. Only planning views made public will display in the content drop-down for the pod. If the layout is intended for use within a project page, check the **Filter to project** option to display the view filtered to the project ID. The filter functionality does not apply to composite planning views.
Plugin	Adds a pod that displays a configured plugin. Click when defining the pod to set the properties, attributes, and default settings of the plugin.
Portfolio Optimization	Adds a pod that contains information typically used when creating layouts for portfolio optimization purposes. The **Projects Grid** selection includes information for all projects in the loaded portfolio that a user has access to, and that are included in a class with the **Include in Portfolio Optimizer** option selected. Click when creating the pod to define the default set of data columns that display in the pod.
Productivity	Adds a pod that contains productivity-related elements to assist with managing projects and timelines. **Important!** For pods that are used in the personalized home page layouts, Administrators and Process Designers with the Template Access role can make changes to home page layouts on a global level by clicking when defining the pod, for example, to add

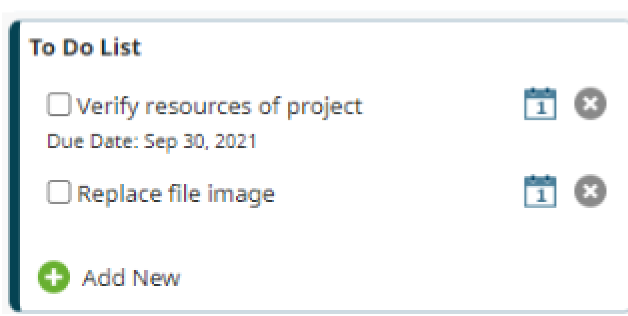
Pod Type	Notes
	company landing page hyperlinks to the Quick Links pod for all users, or to add additional information at a company level. Changes at an individual level should be made by the user from within their personal view. Select from the following options: • **Calendar** - A pod that displays a calendar, allowing users to visually display important dates such as start and end dates for deliverables and activities, deadline dates for workflows, and project gate dates. Double-clicking on an event takes the user directly to the event details or applicable project page. EXAMPLE Example  • **Countdown** - A pod that allows users to display a countdown of days until the occurrence of an important date or event of their choosing. Click when defining the pod to set the event name and date, and to select an image to display in the pod. EXAMPLE Example

<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>


Quick Links - A pod that allows users to display a list of frequently used links to projects, websites, and other global links defined in Accolade. Click when defining the pod to select existing Accolade links, or to create customized links.

Example


To-Do List - A pod that allows users to create individualized worklists by adding tasks to a personalized list, in order to keep track of their tasks and check off items as they are completed.

Example


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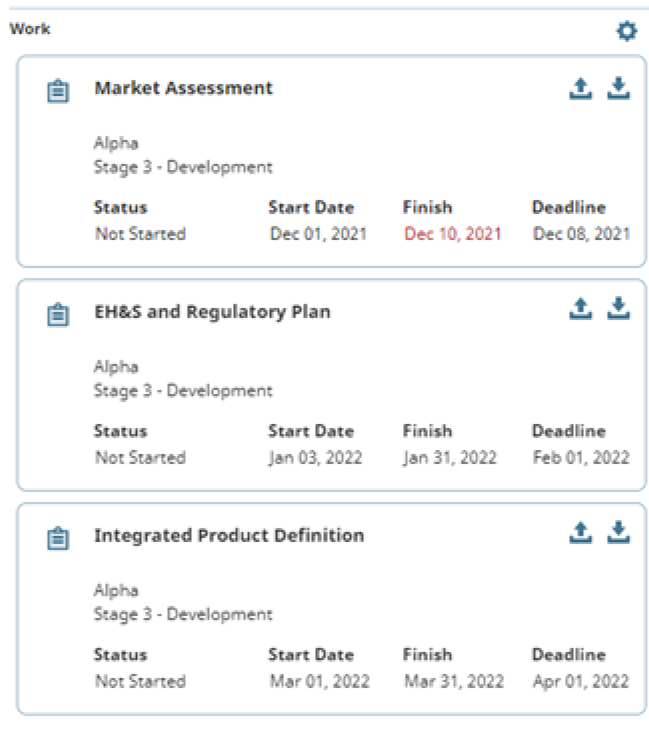
<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>

- **Work** - A pod that allows users to display detailed card views of deliverables and activities, gates, ideas, project work, or workflows associated with their project. Click when defining the pod to specify the default information that is displayed, apply filters, and set the desired sorting. When the pod is displayed on a project, users can click to apply their own view, filter, and sort options.

EXAMPLE Example



Adding the Work pod to a project displays information for just that project. The Work pod also displays on the **Comprehensive** and **Focused** home page layouts, the **My Work** page, and the **Upcoming Gates** page where it provides users with a view of everything assigned to them throughout Accolade. For more information, see Viewing Your Work.

</td></tr>
<tr><td>Project Image</td><td>Adds a pod that is populated with the project's assigned main image or the thumbnail image, based on your selection.</td></tr>
<tr><td>Project Information</td><td>Adds a pod that contains information about a single project when the layout is included as a page within a project.</td></tr>
</table>

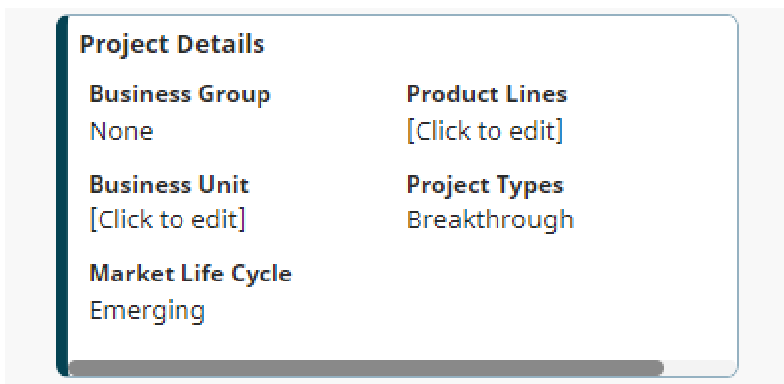
<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>

Note: These pods are not available for selection if the **Create global link** option for the layout is selected.

Select from the following options:

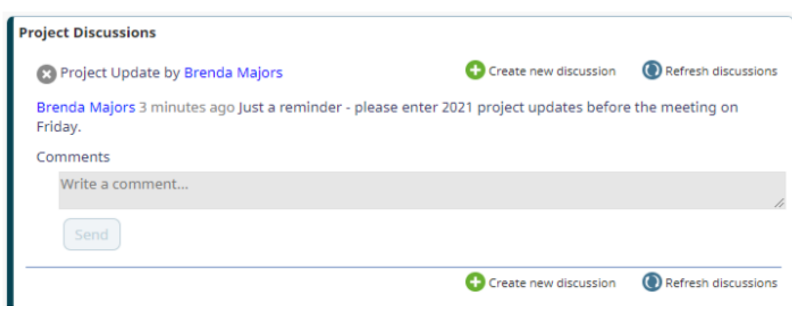
- **Data Form** - Provides a place to show and edit project metadata and metric information. Click when defining the pod to select the project metadata fields and metrics to include in the pod and define how many columns the pod contains. When the pod displays in a project, metric and metadata fields are editable based on a user's role and permissions within the project, unless the data is checked as read only. Long string metrics with the **Rich Text** check box enabled cannot be added.

  EXAMPLE Example

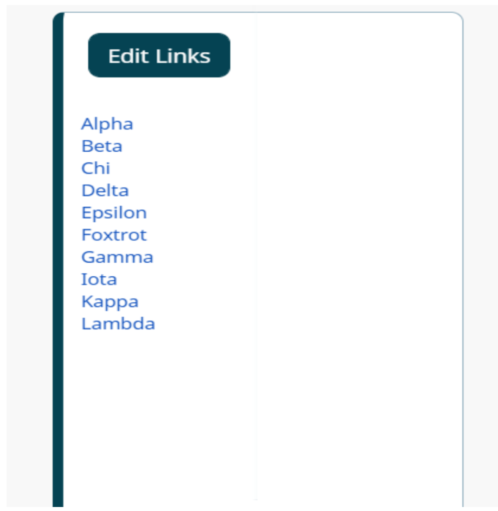
- **Discussion** - Includes a pod that includes the Accolade discussions functionality, providing contributors to discuss ideas directly on the page.

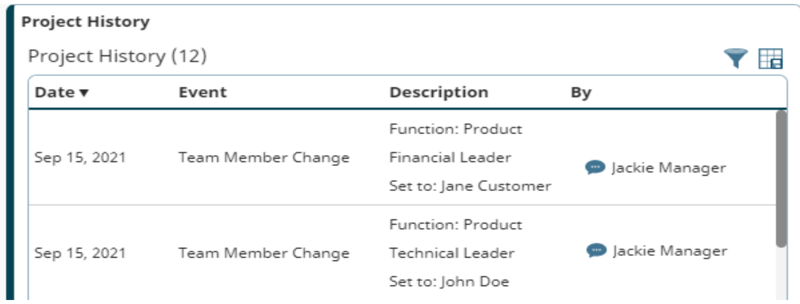
  EXAMPLE Example

- **Links** - Provides a pod which supports adding and removing links. Click when defining the pod to indicate the Link Name, Process Models and filters used to identify the linkable items to be presented to the user, as well as the

</td></tr>
</table>

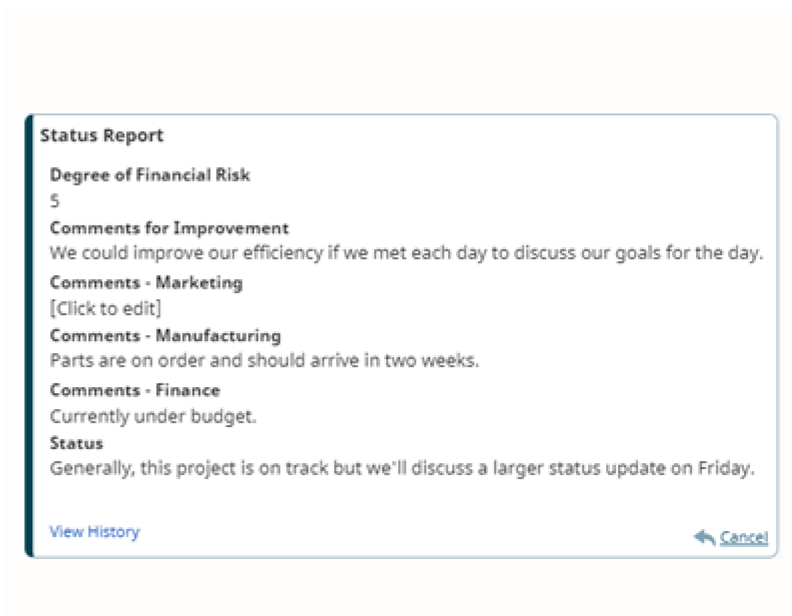
Pod Type	Notes
	button text and a tooltip. When used, the pod shows any items already linked, and allows the user to select new items to be linked, as well as offering the possibility to remove links. Only items matching the filters set by the Process Designer are shown to the user. If desired, you can indicate that filters may be changed at runtime by the user. Example  • **Portfolio Project List** - Includes a list of all projects that are part of a portfolio or campaign. • **Project History** - Provides a place to view a project's history including a fixed list of events recorded as users make changes on the project. Users with access to the project have access to the project history. Project history includes, but is not limited to, gate decisions, status reports, stage advancement, and currency updates. Click when defining the pod to select filter criteria determining what displays on the pod. Only project history meeting the filter criteria displays on the pod. Users on projects can still filter project history when the layout displays on a project page, but they cannot save their filter preferences when filters are set on the pod configuration. Example

<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>


- **Project Status** - Provides a place to show and enter status reports for the project. The pod also provides a link to view the project status history. To allow the entry of new project status reports, select the **Use master buttons** option on the layout that contains the pod. If the master buttons are not included, the content of the project status pod displays as read only.

  When the pod displays in a project, the ability to add a project status is based on the user's roles and status permissions on the project team. Metrics are editable based on the metric's presentation settings for **Status Report** within the process model.

  EXAMPLE Example



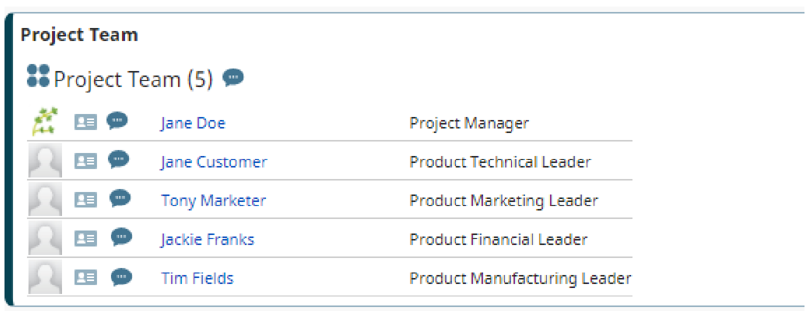
- **Report List** - Provides a list of available reports to add to the pod. Click ⚙ when defining the pod to select the reports list that displays. See Associating Charts and Reports to Process Models for more information.
</td></tr>
</table>

<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>

Security List - Provides a place to display and edit defined security lists. Click when defining the pod to select the security list that displays. Only one security list can be selected to display in a pod. Users with certain management rights and allowed access can modify the security list when the layout displays on a project. Additionally, users can only modify levels of a given security list to which they have access. Other levels of the security list display as read only in the pod.
Team - Provides a place to display users assigned to projects including project manager or team leader, project team members, workflow action owners, and gatekeepers. Click when defining the pod and select Project Team, Workflow Action Owners, or Gatekeepers. Only one group of users can be selected to display per pod.

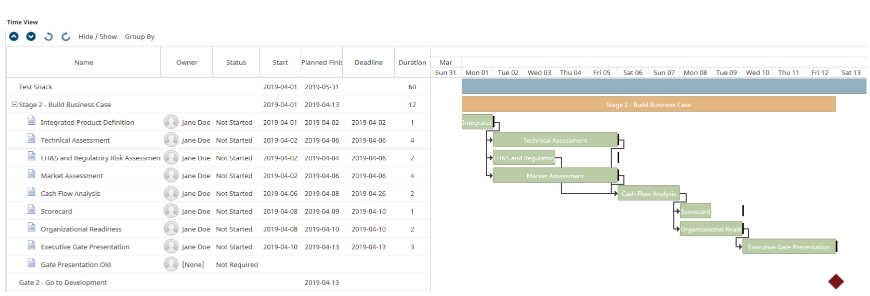
If the Enable User Profile Images is disabled, the Detail View becomes the default view. Click and in the top left corner of the rendered pod to toggle between simple and detail views.

EXAMPLE Example

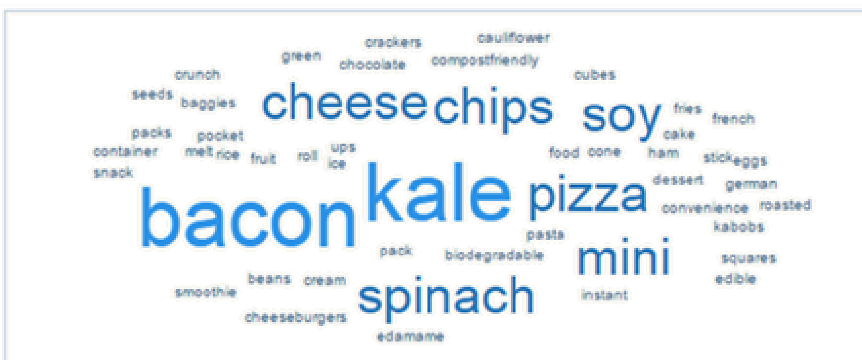


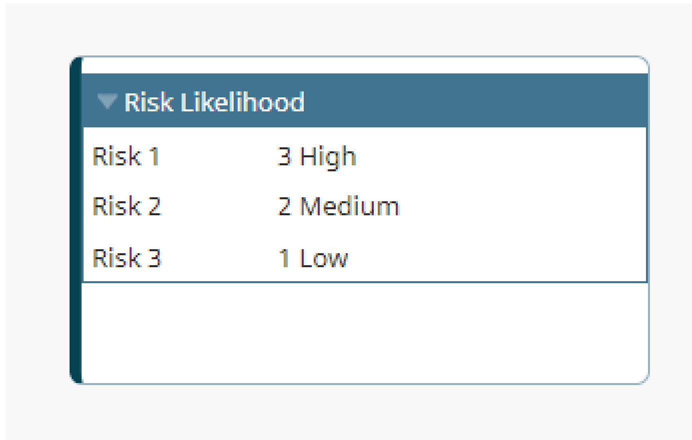
Time View - Provides a place to visually view all the work, including deliverables, activities and gates for the entire project over the course of time.

EXAMPLE Example



</td></tr>
</table>

Pod Type	Notes
	• **Trended Number Metrics** - Provides a way to display trended metric data in a pod with a layout. Pod settings provide options to set metrics and trended metric dates that display in a table. For portfolios, number metrics with Track History turned on are trended for projects linked with hierarchy relationships. Differentials between numeric metric values are calculated and displayed in number and graphic format. Table data displays in a Line Chart Trends chart. The table and chart can be included in a PowerPoint template, and is included when downloading and refreshing the presentation. • **Trended Metrics Table** - Provides a way to see metric changes over time. Metric values display for each selected metric for each project in the portfolio or for the displayed project. This can be helpful for viewing trends in a portfolio to help identify problems and track the health of a project. • **Word Cloud** - Provides a graphic that surfaces keywords from the name and description of the project and all the projects contained within a parent project. Each word displayed in the graphic is linkable to Quick Search to display project results containing the keyword. Use this pod in idea campaigns to provide visual interest and a way to display trending terms in ideas submitted to the campaign. Words appearing more often are larger and more prominent. The words in the pod display in variants of pods content font color. EXAMPLE Example 
Quick Grids	Adds a pod that contains a quick grid assigned to a project. Only active quick grids are available to add to a pod. Process Managers and Idea Managers with Manage Process rights, and a project's assigned Project Manager, have access to enter data in a quick grid within a pod displayed within a layout-generated page in a project. Click when defining the pod to enable **Read Only Quick Grid**. Quick grids set as read only can not be edited. EXAMPLE Example

Pod Type	Notes
	 **Note:** Matrix quick grids added to a pod do not contain filtering options at this time.
Report	Adds a pod that contains an Accolade online report. In order to add a report to a pod, the report must be set as **Available to Configuration** and the report access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the report to be available for them to use in the layout. Viewing a report's contents within a page layout does not require Reporting Rights; however, a user must be an owner or have at least one matching user role for the report to display. Configure additional settings available for report pods including a download option and page size.
Report Groups	Adds a pod that contains the content settings for a comparison view layout. Click when defining the pod to select the reports and charts available to a comparison view page layout. **Note:** The report groups pod is created as a part of creating a comparison view page layout, and is not independently available at this time.
Template Image	Adds a pod that displays an image saved to the Template Library (with a template type of **Image**). To add a new image select **Add New** from the **Content** list. Items added here are also added to the Template Library.
Voting	Adds a voting mechanism, where users can make a selection between 0.5 and 5 (in half star increments) to rate the project or idea.

Pod Type	Notes
	Add a voting pod when creating layouts for ideas submitted from an idea campaign to gather feedback from other users about submitted ideas. Votes are recorded in a system-generated matrix for the project, which managers can use in quick grids or through reporting to evaluate the votes cast for a project, concept, or idea. **Note:** The voting pod is part of Ideation.

Creating Page Layouts

Administrators and Process Designers with the Template Access user role can design custom layouts to surface project information, such as a project dashboard page that displays when opening a project. Page layouts can contain one or more pods to display information such as project metrics, content accessed from a global link, charts or reports data, quick grids, and more. Layouts can be added as a global link within Accolade or associated with a process model for display within a project.

To create a page layout:

1. From the **System** menu, select **Page Design > Layouts**.

   To narrow the layout list, search by the layout name, system name, or category.

2. Do one of the following:

   - **To create a new page layout** - Click **Add New** in the upper right corner of the page.
   - **To edit an existing page layout** - Click the name of the layout to open it for editing.
   - **To create a layout based on an existing layout** - Click in the **Copy** column to create a copy that can be used as a base to build a new layout.

   The system includes active layouts titled **Project Home** and **Project Gates** that can serve as a project's home and details page, and project gates pages. Copy the layouts to customize them further instead of modifying the original system layouts, ensuring you do not lose the original layouts' pods and format.

3. Enter the following information to identify the layout:

   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 layout.
System Name	Enter a unique, shorter name that identifies the layout in queries, reporting views, field codes, and other places in Accolade. The name must be unique among layouts and can contain only letters (English alphabet), numbers, and the underscore.
Icon	Select the icon and icon color to be used for the layout.

Field	Description
Description	Enter a description of the purpose or nature of the layout. This description helps other users identify the layout throughout the system.
Category	Enter or select the group to which this layout belongs. Use categories to organize like layouts together. For example, you may choose to group all the layouts used for global layouts into the same category, in order to separate them from layouts that are used in process model configuration. • 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. Layouts specific to project pages, configured based on process models on upgrade, display in an **Upgrade** category and are named based on the correlating process model.
Order	Enter a number to specify the page layout's place when it displays in a list of layouts. Lower numbered layouts display higher in the list. **Note:** Layouts set as active project pages will display before existing project pages to provide most relevant data first.
Active	Select this check box when the layout is ready to use. **Note:** If you deactivate a layout that is associated with a process model, the association remains; however, the projects based on the model no longer display the layout as a project page.
Create global link	Select if the layout's intended use is as a global link that is accessed from outside a project. When selected, a global link is created when you click **Save** or **Save and Close** in the layout editor. If this layout's intended use is as a dashboard or other page displayed in a project with project-specific information, leave this check box clear. After creating the layout, go to **System > Page Design > Global Links** to configure the global link.
View in Accolade Go	Select to make the layout available for viewing in the Accolade Go mobile application.

Field	Description
	Note: If an **Advanced Platform** pod is set to a layout, the **Available to Mobile** check box will be disabled.
Show project header	Select this check box to include the header portion of a project page when this layout displays within a project. For example, you may choose to not show the project header for layouts used to gather ideas and for idea campaigns. The default hides the header in layout pages.
Hide project menu	Select to remove the project details menu access from the layout on a project. Hiding the project menu removes the ability to: • access the communication options for email and chat. • migrate, copy, close, or delete a project from the layout.
Hide Navigation Breadcrumb	Select this check box to hide the hierarchy breadcrumb and menu from the layout on a project. For new layouts, this option is unchecked by default.
Show process graphic	Select to include the process graphic when this layout displays within a project. The default hides the process graphic in layout pages. Select to show the graphic in projects that use layouts where it is important to show the stage the project is in.
Use master buttons	Select this check box to enable **Apply** and **Reset** buttons that save and reset changes to quick grid pods in the layout that are not set as read only. If unselected, **Apply** and **Reset** buttons are available to save or reset changes in each individual quick grid pod. If the **Read Only Quick Grid** advanced setting is enabled on a quick grid pod, no updates can be made to that pod regardless if master buttons are used.
Enable page filters	Select this check box to enable runtime filters that can be applied to all charts and reports pods in the layout. **Note:** In order to apply runtime filters, the selected reports must be set up with filters that have runtime filtering enabled, and the selected charts must be created from an online report with filters that have runtime filtering enabled.

Field	Description
	If unselected, filters may be available to be applied individually to charts and reports pods, but not to the layout as a whole. See the Viewing Charts and Reports topic in the Accolade online Help for more information on runtime filtering options.
Enable cycles	Select this check box to enable Charts on the layout. Chart Cycles can be enabled on any layout. Cycles allow you to look at the various charts based on a common metric, such as Region, Business Unit, Product Line, etc. Each chart configured for Cycles will re-render based on the selected Cycle value.
Add to new Process Models	Select to automatically associate the layout with **Gated**, **Non-Gated**, and/or **Idea** process models when new process models are created. The layout defaults as checked in the **Pages & Layouts** section on the **Pages** tab of a new process model and is useful when wanting to include the layout as a default project page.
Page width	Select how the page layout width is determined. • Select **Autofit** to display the page to fit the pods and pod contents left aligned. • Select **Fixed** and enter the width of the layout in pixels to have the page display with a forced width.
Fill page	Select to expand the height of the lowest pods in the layout. The pods extend to fill the remaining space on the layout if the layout does not already scroll on a page. If the layout scrolls, the lowest pods do not expand.
Alignment	If you set the page width as **Fixed**, select the layout alignment as **Left**, **Center**, or **Right**.
Margin color	If you set the page width as **Fixed**, click the color block next to the field and select a color to apply to the margin width of the layout.
Background color	Click the color block next to the field and select a color to apply to the background of the layout.
Configuration Access Groups	Select the access groups to which the layout belongs. Process Designers with matching permissions will be able to edit and view the layout or the data within its pods. The access groups displayed are based on the current user's access group permissions and the access groups the layout belongs to.
Process Model Usage	*(Only available when editing an existing layout)* Click the **Process Model Usage** button to see the list of process models that the layout is associated with. The list includes all process models the layout is included in, as well as links to the process model's component tree pages that you have Edit access to.

4. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.
5. Continue with any one or more of the following steps to complete and implement the layout:
   - Add one or more pods or comparison sets to the layout. Without at least one pod, the layout is blank.
   - Associate the layout with one or more existing gated, non-gated, or idea models to include it in projects based on that model.
   - Add the layout as a global link to display the page outside of a project.

Notes:

- To delete a layout, click in the **Delete** column on the Layout page. If you delete a layout that is used as a global link, the global link is also automatically deleted.

  Important! Do not delete system layouts used for personalized home pages. You will not be able to undo this action and will have to contact a System Administrator to run a script to re-add the layouts.

- Copying layouts containing the Advanced Platform pod will not copy the JavaScript or HTML files. Save the copied layout then add or upload the JavaScript and/or HTML files.
- The filter icon will not appear in a layout's charts or reports pods if there are no filters available for users to apply to the contents.

Exercises - Create a Campaign Using Page Layouts

Try out what you have learned!

- Design a campaign using a page layout. Ensure the layout contains a **Create Project** pod.
- Include an image pod, several different metric pods, and voting pods.
- Associate the page layout to a project.

Submitting Ideas

Accolade provides a mechanism to submit ideas for products, services, and other areas that your company has chosen to campaign for ideas. Users with Accolade access can enter ideas directly through Accolade.

How you enter ideas depends upon how the idea submission or idea campaign was created. Work with Accolade designers and managers at your sight regarding how you enter and idea at your company.

To submit an idea to an idea campaign:

Search for a campaign project and add the project directly from the campaign. Users must have access to the campaign project based on access group accessibility.

1. From Accolade, search for the name of the campaign that is provided to you from the campaign manager or other executive at your company, and display the project.
2. Review the details of the campaign.
3. Click **Add New** within the campaign project and enter the information for the idea.
4. Click **Create** to submit the idea to the campaign.

> Depending on how campaigns are setup at your company, your submitted ideas may be available in the Work pod on the **My Work** page from the **Workspace** menu. Ensure the Work pod on this page is configured to display Ideas. You can also see a list of projects added to the campaign from the Portfolio tab in the campaign project, or a portfolio project list, if available, within the campaign's page layout.

To submit an idea in Accolade from the Ideas menu:

1. Do one of the following:
   - From the **Idea** menu, click **Submit Idea**.
   - Open the idea submission web page provided to you and continue with step 3.
2. If you accessed the idea submit page through the **Idea** menu, select an idea type and click **Continue**.
3. Enter a descriptive idea name and provide an email address so the company can contact you about your idea.

   If you accessed the entry form from the **Idea** menu, your email address is filled in with the address associated with your Accolade user profile.
4. Select the **Notify me of gate decisions about this idea** check box if you want to be kept informed about the evaluation of your idea as it moves through the evaluation process.
5. Complete the details about your idea in the fields provided.

   The details for each idea vary depending on your company's implementation, and possibly the idea type you are submitting.
6. In the **Attachments** section, upload files containing additional information about your idea.

   For example, you may have sketched a picture of your idea that would be helpful to share to the person who evaluates idea submissions at your company.
7. Click **Submit** to save your idea and send it for evaluation.

> To view ideas that you have submitted that have become projects, select **My Work** from the **Workspace** menu. Ensure the Work pod on this page is configured to display Ideas.

Resubmitting Ideas

If you submit an idea that needs more information, the idea might be returned to you so that you can provide the needed information. The request to resubmit your idea arrives in an email containing a link to the Idea page where you can modify the details or add attachments to provide the additional information as requested.

If the Idea Manager cancels the request for resubmission, the link no longer works. If the request is canceled while you are working on providing more details, the idea is no longer available for resubmissions.

Notes:

- If the **Automatically Publish Submitted Ideas** system parameter is enabled, the documents attached to an idea submission are automatically published and are available through search.
- Attachments are viewable as related documents.
- This article mentions using the Work pod on the **My Work** page to view submitted Ideas. Depending on your company's configuration, you may not have access to this menu or it may be renamed. The Work pod is also available on the **Comprehensive** and **Focused** home page layouts, and on the **Upcoming Gates** page.

Voting on Projects, Concepts, and Ideas

Any Accolade user that has access to a project that contains a voting pod within a layout can rate the project on a scale of 1/2 star to 5 stars, similar to product ratings on surveys and retail web sites. Collecting votes from Accolade users allows campaign managers further insight into which projects and ideas have the highest collective backing among internal employees.

The project must contain a voting pod, which is available on a custom page added to the project.

To complete cast a vote on a project, concept, or idea:

1. Display a project and click the custom project pages icon for the page that contains the voting pod.
2. Using the star scale, select your rating to cast your vote.

   The lowest rating is 1/2 a star. If no stars are selected, it indicates no vote on the project.

   Your vote is saved. You can return to the project to change your vote as long as the voting for the project remains open. Your last saved vote displays if you return to the project.

Notes:

- Votes are automatically saved when you make a selection in the star scale.

Exercises - Vote on Ideas in Projects

Try out what you have learned!

- Navigate to the project containing the idea campaign page layout.
- Select the custom project page containing the voting pod.
- Use the star scale to select your rating.

Managing Idea Submissions

When an idea is submitted, an idea project is created. An Idea Manager or a Project Manager (depending on the idea setup) are assigned as the Project Manager to the new projects to review and evaluate the ideas, closing idea projects for ideas that are not being considered for future efforts. The assigned manager to a campaign is considered the campaign manager.

Do the following to manage ideas within Accolade:

- Review ideas submitted to a campaign.
- Review votes cast.
- Request more information about an idea to add or correct information to make the idea a better candidate.
- Manage the project through the evaluation process, assigning team members to prepare deliverables, just as a standard project.

When the last gate meeting of an idea project has received a go, the Process Manager can migrate the project to the appropriate development model.

Reviewing Ideas Submitted to a Campaign

Idea campaigns are specific efforts that your company puts forth to gather ideas around products or initiatives and are created using a portfolio project model. Each idea submitted to the campaign becomes a child project to the campaign.

To review the ideas submitted to a campaign, you can do one of the following:

- Display the campaign project and click the **Portfolio Browser** page. Select the **Child Relationship** link type and click to display the ideas submitted to the campaign. Double-click an idea project in the browser image to display the project details.
- Add a Portfolio Project List pod to the campaign layout, or to another layout page within the campaign. The Portfolio Project List pod contains a list of the ideas submitted. Click a project link within the pod to display the project details. Adding the pod to the campaign layout also allows other users to see a list of ideas already submitted to the campaign.

Reviewing Votes Cast for Ideas

Users can cast votes for projects and ideas if a voting pod is added to a layout in the project. Votes are stored in a system-generated matrix called **Voting Matrix** that includes the user name, user ID, and the score as metrics within the matrix.

Do one of the following to view the votes cast for the project:

- Create an online report that includes the project name or ID and the **Voting Matrix** in the Projects subject. The report includes all votes cast by project. Use filters to create a report for a single idea.

- Add the **Voting Matrix** matrix to a quick grid and add it to a deliverable or to a pod that displays within a layout in the project. Include the matrix's metrics to view the user name, ID, and voting score in the grid.

To view the average vote cast for the project, use a calculated metric that uses the **MatrixRowCount** formula to return the number of votes, which can then can then be used to determine an average vote rating.

Request More Information About Ideas

> **Note:** Idea resubmission requests apply only to ideas created using an idea model. If a campaign is set up to use a non-idea model as the **Default Portfolio Model** in the campaign model definition, this feature is unavailable.

Idea Managers can return an idea to its submitter for additional information and clarification if the original detail provided is not detailed enough to evaluate the idea. The original submission must have included the submitters email address to request that the idea be resubmitted using the process below.

To request more information about an idea:

1. Display the idea project.
2. Click in the upper right corner of the page and select **Return Idea to Submitter**.

   If the idea deliverable is part of a workflow that is in progress, the Return Idea to Submitter is unavailable until the workflow is completed or canceled. When you return an idea for resubmission, the idea deliverable workflow cannot be started until the idea is resubmitted or the request to resubmit is canceled.
3. In the Remarks... dialog box, enter any notes about why you are returning the idea to the submitter, including information that is required for the idea to be evaluated.
4. Click **Return Idea and Send Email**.

   Accolade sends an email containing your remarks and a link to the Idea page where they can modify and add additional information, as necessary.

> **Note:** The idea must be published to return it to the submitter.

To cancel a resubmission request:

1. Display the idea project.
2. Click in the upper right corner of the page and select **Cancel Resubmission**.

   If you cancel the resubmission request before the resubmission arrives, the submitter cannot resubmit the idea. The idea project contains the information it had when it was originally created.

   Accolade does not send an email to the submitter about the cancellation.

> **Note:** The idea must be published to cancel the resubmission.

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