



Sopheon Accolade[®]

Innovation Planning and Roadmapping - Working with Planning Views Training Guide

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About Sopheon Accolade®

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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
<i>Sopheon Accolade What's New in This Release</i>	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.
<i>Sopheon Accolade Administrator's Guide</i>	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
<i>Sopheon Accolade Installation Guide</i>	Provides information about the installation of the application and its required databases.
<i>Dashboards for Accolade Installation Guide</i>	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

- Planner
- Planning View Designer*
- Process Designer**

Terms and Concepts

- Planning Elements
- The element organization for your company
- Accolade terminology

Related Training Modules

- Getting Started with Accolade
- Introduction to Planning
- Planning in Accolade

* To create public views.

** To add views as global links

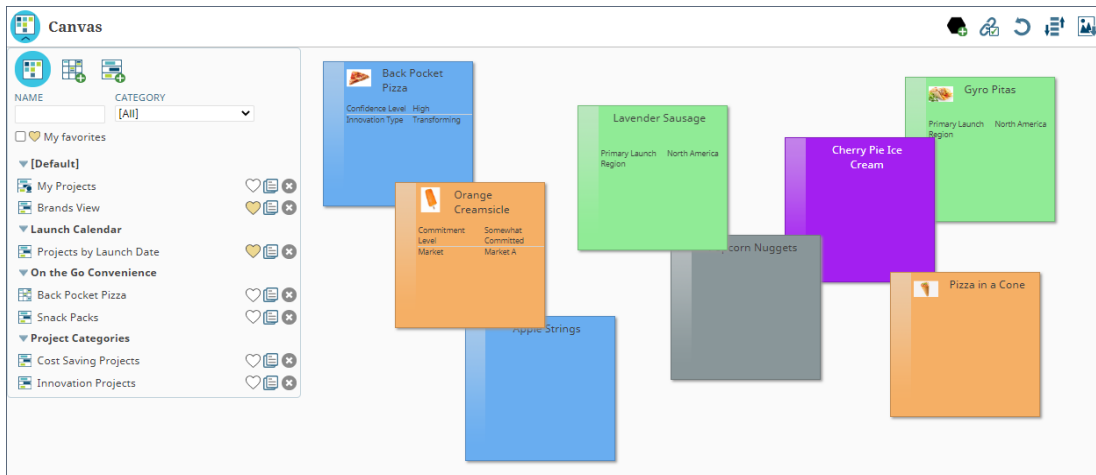
In addition to the Accolade roles above, additional roles may be required to work with elements within a view. For example, to change an element's start and end date within a view, you need to be assigned as the Project Manager/Team Leader on the element, or be a Process Manager with Manage process rights to the element's access group. Additional roles are indicated throughout this module as required.

Innovation Planning Workspace

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

Planning Elements and Types

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



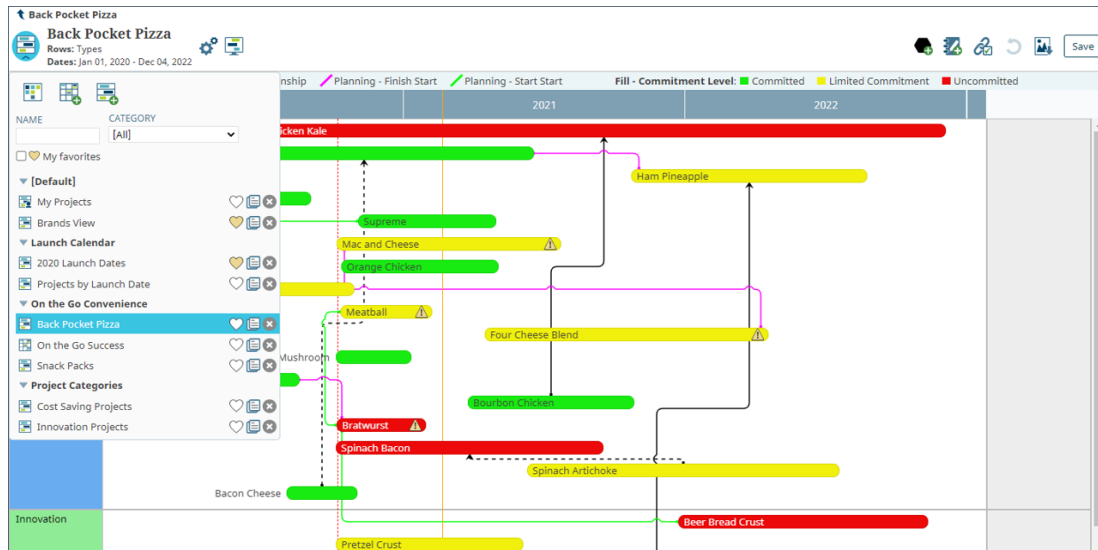
Individual plans and initiatives are written on planning elements that Planners drag-and-drop into any view within the Planning Board. To help organize planning elements and to speed up the creation of innovation plans, create and save element types that Planners can use once, or use as a template to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

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

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

Planning Views

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



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

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

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

Planning Views Overview

The views in Accolade Innovation Planning provide several ways to view the data in planning elements and to compare the elements. The highlighted icon above the planning pad indicates what type of view is currently selected.



- The Canvas view is the default view. It shows elements without any specific view of their data selected and no specific comparison of them configured, except for their arrangement within a hierarchy. This view provides a single place to view all elements that exist at the main level of the planning hierarchy and is a place to use for brainstorming. As elements are added to other views, they are also added to the Canvas view. From the Canvas view, you can access each parent element's hierarchy and all details about an element.



- Grid views can show comparisons between planning elements in terms of their list or date metrics or element type. The element's location in the view shows what metric value it contains. You can also change an element's metric values by dragging it in the view. A grid view can be displayed as a set of rows or columns or as a grid of rows and columns with different values on each axis.

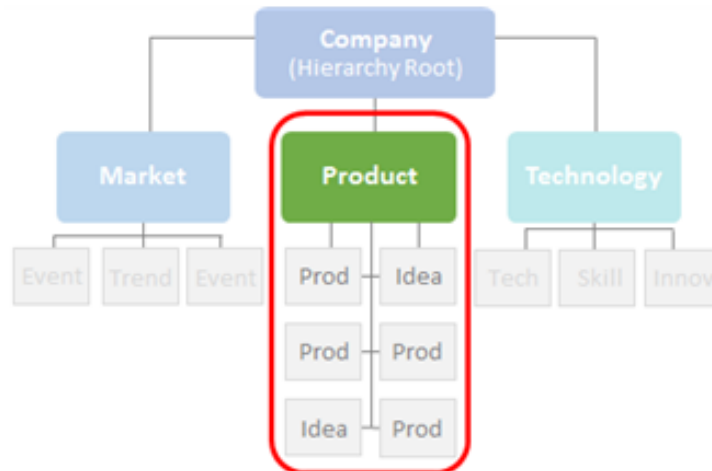


- Available with Accolade Roadmapping, Gantt views can show temporal relationships between elements across a span of time. The horizontal axis of the view represents is a timeline while the vertical axis categorizes the elements by type or list metric, or by hierarchical relationship.

To change the view type displayed, with the pane open, click the name of one of these views to view the Canvas or set up a Grid or Gantt view, or click the name of a saved view to view a comparison that has already been set up.


Security and Views

Only the elements that you have security rights to access display in the any view. In addition, only the elements at or below the level within the business hierarchy display within the view. If a view is created at the product level, that view contains the items that exist in the hierarchy from the Product element and below. That view does not contain elements in the Market or Technology portions of the hierarchy, unless the elements have dependency relationships and the viewer chooses to display those relationship types.



Changes Made to Elements in Views

Any changes made to an element in any view are saved in real time. The changes are applied to the element as a whole, and are not specific to the element in that view.

As you make changes to element details in the Gantt view and the Canvas view, including changes to dates, titles, links, and metric values, you can revert your changes by clicking  in the top right corner of the view header. The undo functionality does not apply when you delete an element or component such as a planning view. The undo icon is disabled if the change cannot be undone.

Note: Undoing changes is available in the view (Gantt or Canvas) that currently displays. If you navigate away from the view, undo resets to only undo the changes in that view. For example, if you modify dates on an element in the Canvas view, and then display a Gantt view, you can no longer undo the date change made within the Canvas view.

My Projects View

The My Projects Gantt view shows all projects that you have been assigned to as either a Team Member or as the Project Manager. The My Projects view filters the information in the Gantt to include only those projects to which you are assigned, sets the date range automatically to include the time span appropriate to include all your projects.

Note: Team Members can update element metrics and matrices within the My Projects view, but do not have access to modify the types and milestones available in the view, or to create or modify relationships.

Access Within Innovation Planning and Roadmapping

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

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

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

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

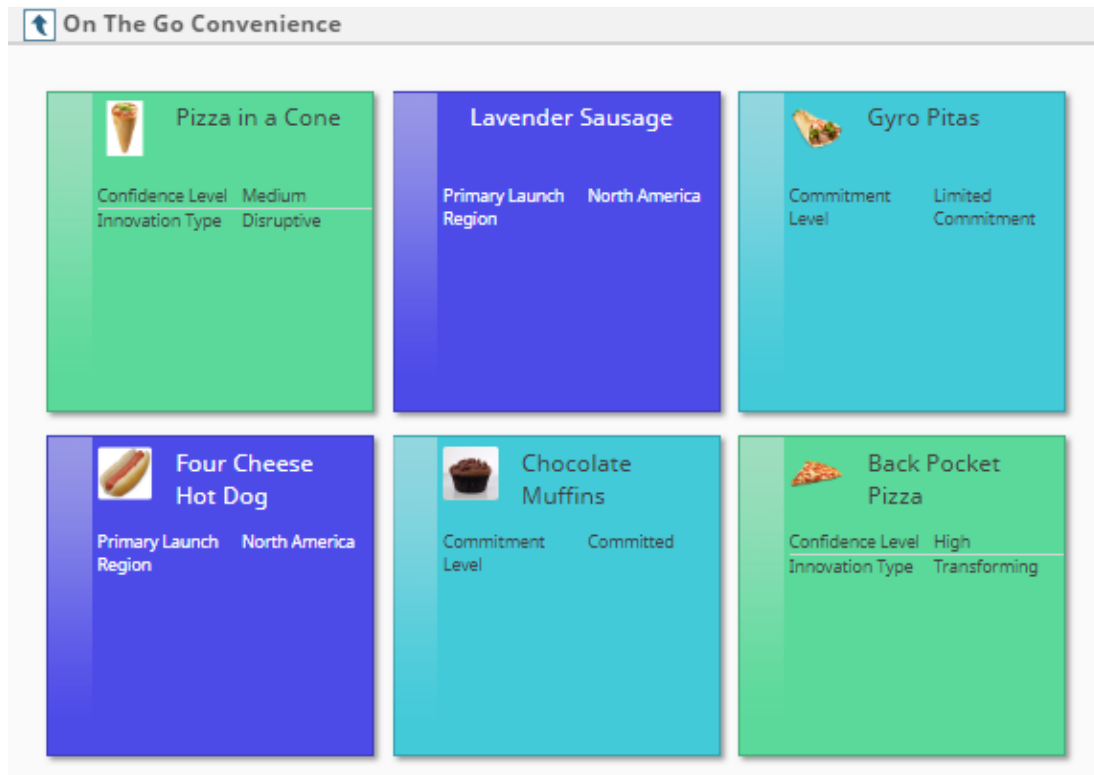
The following rights and permissions are required within Innovation Planning:


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

Working with Elements in the Canvas View

As elements are added to any view, they are also added to the Canvas view. The Canvas offers a place to view all elements available that make up your planning strategy.

The Canvas view shows elements without any specific view of their data selected, and no specific comparison of them configured except for their arrangement within a hierarchy. From the Canvas view, you can access each parent element's hierarchy and all details about an element.



As you make changes to element details in the Gantt view and the Canvas view, including changes to dates, titles, links, and metric values, you can revert your changes by clicking  in the top right corner of the view header. The undo functionality does not apply when you delete an element or component such as a planning view. The undo icon is disabled if the change cannot be undone.

Note: Undoing changes is available in the view (Gantt or Canvas) that currently displays. If you navigate away from the view, undo resets to only undo the changes in that view. For example, if you modify dates on an element in the Canvas view, and then display a Gantt view, you can no longer undo the date change made within the Canvas view.

Sorting Elements in the Canvas View


Within the Canvas view you can move planning elements around to best fit your needs. You can also sort the elements alphabetically in a square tiled display in ascending or descending order to help

organize the elements in the view

To sort elements in the Canvas view:

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

The Canvas view loads as the default view.

2. Click  in the left toolbar to arrange the planning elements in alphabetical order from left to right, starting at the top left of the Canvas.

Click the icon again to arrange the elements in reverse alphabetical order.

Moving Elements in the Canvas View

Element Team Members can move single planning elements around on the Canvas view or its child boards by dragging the element. Moving elements on the Canvas has no effect on element metric values or dates. Planning Elements may also overlap in the Canvas view. See the information below to bring a planning element to the top of a stack of elements.

To move elements in the Canvas view:

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

The Canvas view loads as the default view.


2. Hold the CTRL key while clicking the left side of the elements to select to move.
3. Click the left side of the selected elements and drag the group.

To remove the selection from a group of planning elements, click outside the element where the Canvas is blank.

To bring an element to the top:

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

The Canvas view loads as the default view.

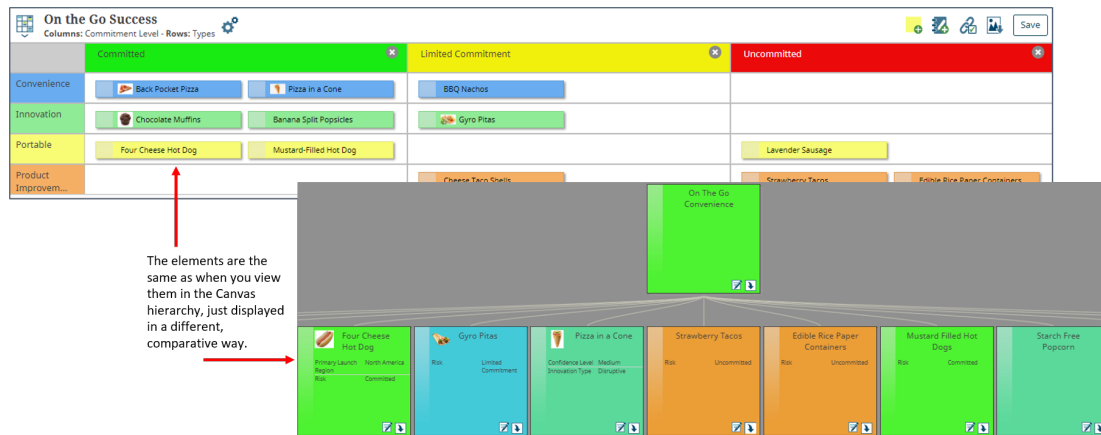
2. Point to the left side of the element until the pointer changes to  and then click the element.

Notes:

- If you drag from outside the canvas onto the canvas, a selection may cover the screen in blue. Click the canvas to remove the mistaken selection.

Grid Views Overview

Grid views can show comparisons between planning elements in terms of their list or date metrics or element type. The element's location in the view shows what metric value it contains. Change an element's metric values by dragging it in the view.



A Grid view can be displayed as a set of rows or columns or as a grid of rows and columns with different values on each axis.

Creating Grid Planning Views

Create Grid views to compare a group of planning elements by their metric values or types. A Grid view allows Planners to add or modify metric values in an element by dragging the element to a location in the grid, column, or row that corresponds to that value.

A Grid view can be either two-dimensional (rows and columns) or one-dimensional (either rows or columns). A two-dimensional grid shows the relationship of two metrics in a group of elements or the values of one metric across the element types. A one-dimensional grid shows the values of a single metric or the distribution of the elements across the element types. Each cell in the grid is associated with a selected metric value or element type or with a combination of two of these, and the grid shows what values the elements have, or what type they are, by their location.







After creating a Grid view, Process Designers and Administrators can create a global link to the view and [add it to a menu](#) or to a [pod within a layout](#).

Planners can create and save views for their own use; however the Planning View Designer user role is required to save views for other Planners. Additionally, the Planning View Designer role is required to create new categories to group views.

To create a Grid planning view:



1. From the **Planning** menu, select **Planning Board**.
2. Navigate to the correct element and child board on which you want to create the view.







You can create a Grid view of elements that you see on the Canvas, or from an element's child board.



3. Click the Planning Views  panel icon in the top left corner of the page and do one of the following:
 - **To create a new view** - Click  **Add Grid** at the top of the view list.
 - **To modify an existing view** - Click the name of the saved view, and click  next to the view name to open the Edit Grid Settings dialog.
 - **To create a new view based on an existing view** - Click  next to the view that you want to copy.
4. In the Add New Grid dialog, complete the following information to identify and describe the view:

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


Important! You must select an option in both the **Columns** and **Rows** fields to display the view. When the grid is rendered, all existing elements are displayed in the appropriate location depending on their content: element type, metric values, start date, or end date.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the Grid view when saved.
Category	Select the category to which this view belongs. <ul style="list-style-type: none">• 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. Views can exist in only one category. Views display within a category to users who have access to the view.
Description	Enter a description of the purpose or nature of the view.
Filters	Select one or more metrics in the Filters drop-down to narrow the view to include only elements that contain certain metric values. <ul style="list-style-type: none">• To filter by a single metric, select the metric from the list.• To filter by more than one metric, click  in the drop-down to add additional metrics. After selecting a metric, click  to select the metric values within each metric to display. If you select more than one value, an element must match either value to display in the view. If you want to filter on elements that contain a multi-select metric with multiple values, you must add the metric multiple times to the filter list and select the values individually for each metric.


Field	Description
	<p> Example</p> <p>For example, you have a metric called Market Impact Assessment assigned to elements that indicates the market impact of the initiative represented in an element. To create a view that focuses on the high market impact initiatives only, select the Market Impact Assessment metric in the Select Filters field, click  and select High to include only elements that have a market impact of high in the view.</p> <p>However, if you have a metric called Action Item Assignments that is multi-select metric, and you want to display elements that have multiple selections for the metric, select the Action Item Assignments metric in the Select Filters field multiple times, and select a single value for each instance of the metric.</p> <ul style="list-style-type: none"> • To include a legend that shows the metrics and values that are applied to the view, select the Show Selected Filters check box when selecting filters and values. The legend displays in the top header of the view. • Click  to remove a metric from the filter. <p> Elements that do not contain either axis value, but do contain the metric filter values, display in the None section.</p>
Column	<p>Select the type of information you want to display on the horizontal axis of the Grid. This selection determines the sections or columns within the Grid.</p> <ul style="list-style-type: none"> • None - Displays the grid view as a set of rows with no rows. • Types - The grid contains a column for each element type listed in alphabetical order. • A list metric or multi-select list - The grid contains a column for each item in the selected metric. Elements are grouped in the column that corresponds to the metric assigned in the element's details. • Date - The grid contains rows for the selected date metric, element Start Date, or element End Date to define the Grid as periods of time. If you select a date, complete the additional information in the Configure Timeframe dialog as noted below. <p>After selecting the type, click  next to the field to select the values within the axis to display. You can select multiple filter values. For example, if you select to view by Types, use the filter icon to select which types to include in the display.</p> <p> Select the Hide empty columns check box to hide empty columns when generating the view.</p>


Field	Description
Row	<p>Select the type of information you want to display on the vertical axis of the Grid. This selection determines the sections or rows within the Grid.</p> <ul style="list-style-type: none"> • None - Displays the grid as a set of columns with no rows. • Types - The grid contains a row for each element type listed in alphabetical order. • A list metric or multi-select list - The grid contains a row for each item in the selected metric. Elements are grouped in the row that corresponds to the metric assigned in the element's details. • Date - The grid contains rows for the selected date metric, element Start Date, or element End Date to define the Grid as periods of time. If you select a date, complete the additional information in the Configure Timeframe dialog as noted below. <p>After selecting the type, click  next to the field to select the values within the axis to display. You can select multiple filter values. For example, if you select to view by Types, use the filter icon to select which types to include in the display.</p> <p> Select the Hide empty rows check box to hide empty rows when generating the view.</p>

5. Set additional display options to be applied to the view.

Field	Description
Border	<p>Select an option to define and display a border color legend to identify elements within the Grid:</p> <ul style="list-style-type: none">• [None] - The default border type for a Grid view, this selection does not apply any border colors to the displayed view.• A list metric - Selecting a list metric applies a border color to the element based on the metric assigned to it. The list contains only list metrics that have colors defined for one or more of their list items. <p>For example, as you are planning, you use a color-coded list metric to indicate the opportunity level for each element in the plan. Within a Grid view, you can display your elements with that color to visually see where your greatest opportunities are on the timeline.</p> <p> In the Show Legends section, select the Border check box to display an interactive legend that identifies what the border colors represent in the view.</p>
Show Legends	<p>Select the following option to display interactive legends within the Gantt view.</p> <ul style="list-style-type: none">• Border - select this check box to display an interactive legend that identifies what the border colors represent in the view.


6. (Optional) Set the **Sharing, Viewing and Ownership** settings for the view.





Field	Description
Default View for Users	<p>Click  to select users who open this view immediately when they open the Planning Board.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none">• 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.

Field	Description
	A user can have only one default view. If a user currently has a default view, its name displays after the user's name.
Make public	<p>Select this check box to allow all Planners to see this view in the list of saved views, and to allow the view to be set as a global link.</p> <p>A view must have a defined owner in order to be made public.</p> <p> Only Planning View Designers can create public views.</p>

7. (Optional) Set the **Additional Settings** to further establish what displays within the view.

Field	Description
Include parents	<p>Select this check box to include the parent elements in the view, if they meet filter criteria within the current branch of the planning hierarchy that the view displays.</p> <p>The default is unchecked and leaves the parent elements out of the view.</p>
Restrict to current hierarchy	<p>Select this check box to limit the view to only the elements that match the filter criteria within the current branch of the planning hierarchy that the view displays.</p> <p>Clear the check box to display all elements that match the view and filter criteria across the system, regardless of their place in the planning hierarchy.</p>
Save level	<p>If the view displays a child level, select this check box to make the current level of the hierarchy the top level that any user can access in the view.</p> <p>Clear the check box to include the top (root) level in this view, regardless of the current level displayed.</p>
Auto fit in rows and columns	<p>Leave the Auto fit in rows and columns check box selected for a default row height of one element and a default column width of two elements wide.</p> <p>If relationship lines are shown in the grid, the check box is selected and the grid rows expand so that all elements within each row are visible.</p> <p>To manually set the row height and column width, clear this check box and set values in the fields below.</p>
Column width	<p>Enter the number of elements that you want to fit horizontally in each column.</p> <p>Note: If the Auto fit in rows and columns check box is selected, the value in this field is ignored.</p>
Row height	Enter the number of elements that you want to fit vertically in each row.

Field	Description
	Note: If the Auto fit in rows and columns check box is selected, the value in this field is ignored.
Show column/row list color	Select this check box to use the color assigned to list or multi-list item metrics as the row and column header colors of the vertical and horizontal axes.
Background color	Select this check box and use the color picker to select a background color to apply to the view.
Alternate color	<p>Select this check box and use the color picker to select a color if you want alternate rows or columns to display in a different color.</p> <p>Select the Columns and/or Rows check boxes to turn the alternating row and column colors on and off.</p> <p> If Types is selected for rows or columns, an alternate color is not displayed.</p>

8. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
9. *(Optional)* Apply additional view settings to the view.
 - Click  to edit the current settings for the view.
 - Click  to [add annotations](#) to the view.
 - Click  to [display element relationships](#) within the view.
 - Click  to [download an image](#) of the view.
10. Click **Save** in the top right corner of the view to save your changes to the view.

Configure Grids to Organize the Elements by Dates

When you select either a date metric, **Start Date**, or **End Date** for a grid axis, the Configure Timeframe dialog displays. You can select multiple time periods in months, quarters, or years. You can select all the same type of time periods or different types.

Configure Timeframe

×

Period

Month ▾

Quantity

+

Start Date



01/2018

OK

Cancel

If you select one row of Period and Quantity in the dialog, the grid displays all columns or rows as the period you select. If you enter two or more rows of Period and Quantity, the grid displays its first columns or rows as the top period and its next columns or rows as the next period, and so on.


To change these settings:

1. Click  next to the view name to display the additional view settings dialog, then click  next to the axis field you want to change.
2. Enter the following information:
 - **Period** - Select the period of time (month, quarter, and so on) to define the time range in the corresponding columns or rows.

Each period starts the month after the previous period ended. Quarters are groups of four months, not calendar quarters, and single years are groups of 12 months, not calendar years. So a period of 5 Years would be 60 months long.


- **Quantity** - Enter the number of columns or rows of the selected period to add.

To add more periods of a different length, click , select a period, and enter its quantity.

Click  to remove a set of periods.

3. In the **Start Date** field, select a starting month.
The first period begins with this month.
4. Click **OK** to close the Configure Timeframe dialog.
5. Click **Refresh View** to save your changes to the view settings.
6. Click **Save** in the top right corner of the view to save your changes to the view.



Notes:

- To make this view available for display within a global link, click  next to the view name to open the Edit Planning Grid Settings dialog and ensure that the **Make public** check box is selected. Click **Create Global Link**, and enter the settings to finish [creating the global link](#) for the view.
- Unless metric filtering is used, planning elements must match at least one of the axis values to display in the view.
- When a list metric is selected for either the vertical or horizontal axis values, **None** is the first column or row in the view. Planning elements are placed in this **None** column or row when they do not have the metric filter value selected for the axis.

Working with Elements in Grid Planning Views

After creating a Grid view, Planners with the correct rights can create elements directly in the view, move elements to modify their dates and metric settings, and sort the rows and columns order to better organize the view.

Modifying Metrics and Dates by Dragging Elements in Grid Views

Planners who are also members of an element's project team can change the values of list metrics, date metrics, start and end date, or event dates in an element within a view by hovering over the element to display  and dragging the element to a different cell within a Grid view, or by hovering over the element and clicking  to change the element's details. Team members must be part of the element's project team to make these changes.

Note: You cannot change an element's type by dragging it in the grid. You also cannot add an element to a Grid view if the view selections are based on metrics that the element does not contain.



Example

For example, a user has a Grid view that displays **Types** along the vertical axis, and the list metric **Commitment Levels** along the horizontal axis. Dragging a project element from the **High** column to the **Low** column will update the Commitment Level metric value within that project.



[None]	High	Low	Medium
Convenience Hot Dog Orange Chicken	Chicken Kale Spinach Bacon Bourbon Chicken Steak Mushroom	Ham Cheese Bacon Cheese Pepperoni Olive Supreme Four Cheese Blend Meatball	Ham Pineapple Bratknurst Mac and Cheese
Innovation	Gluten Free Crust Beer Bread Crust		Pretzel Crust
New Product Development			
Product Improvement New Ingredient Vendor Portion Control Packaging Changes			
Strategic			



If you have displayed the Grid view using **Start Date** or **End Date** as the vertical or horizontal axis, dragging the element into a different date column or row will update the associated dates of the element.



Adding, Removing, and Renaming Rows and Columns in Grid Views

If a Grid view is displayed using list metrics for either axis, Planners with the Process Designer role can add or modify the metrics by adding, removing, or renaming the rows and columns that are associated with the metric. This is the same as modifying the metric definition by adding, removing, or renaming items on the list.

Note: You cannot add, remove, or rename a row or column that is associated with an element type or a security profile metric.

To add, remove, or rename a row or column in a Grid view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Grid view.
3. Do one of the following:

- **To add a row or column** - Click  in a row heading to add a row below that row, or in a column heading to add a column to the right.
- **To delete a row or column** - Click  in the row or column heading to delete.
- **To rename a row or column** - Click in the heading of the row or column and enter the new name.


Filtering and Sorting Rows and Columns in Grid Views

After you have defined a Grid view, Planners can filter the columns or rows within the view without having to redefine the view criteria. Using filters allows you to remove the columns and rows that contain no data, or to refine the Grid view for pulling into presentations, without having to create a new view or modify the existing view. In addition, you can rearrange the rows and columns within the Grid view so they display in an arrangement that is most meaningful to you.

To reorder the columns and rows in a Grid view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Grid view.
3. Click and drag the row or column to the new location.
4. Click **Save** in the top right corner of the view to save your changes to the view.

To filter the columns and rows within a Grid view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Grid view.
3. Click  next to the **Row** and/or **Column** fields to select the filters to apply to the view.
4. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
5. Click **Save** in the top right corner of the view to save your changes to the view.

Exercises - Creating Grid Views

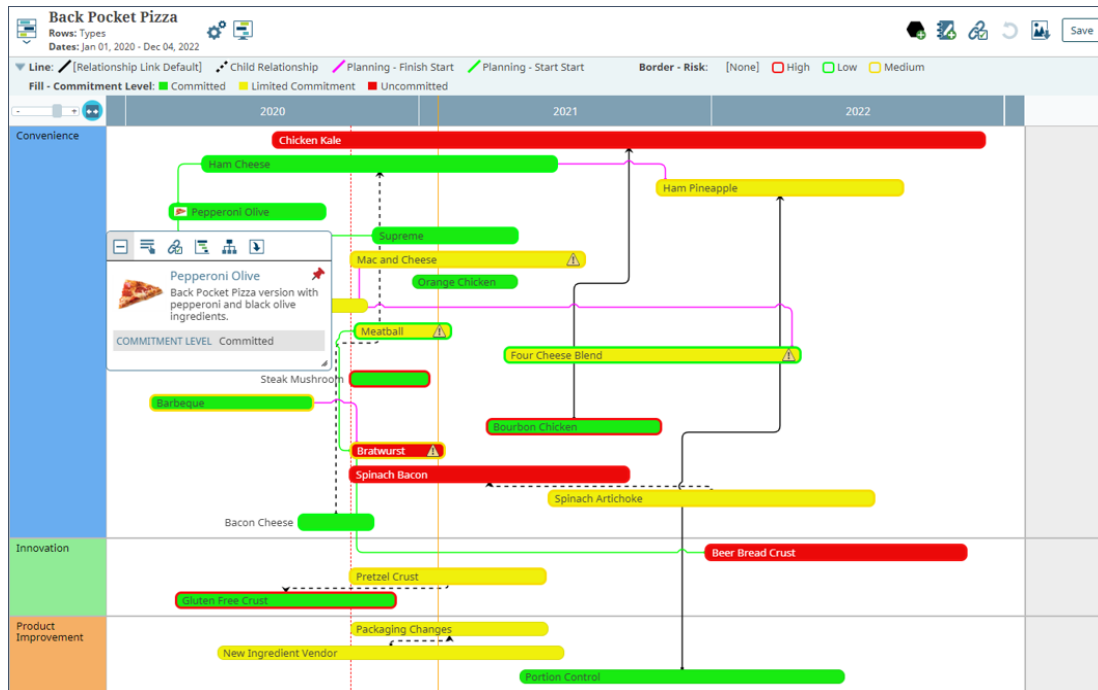
Try out what you have learned!



- Create a grid view that compares elements by a metric on the vertical access and the end date on the horizontal access.
 - Add a new row to the grid and enter a value that applies to the metric on the vertical access.
 - Drag an element to that row. Drag the element back to its original location.
 - Delete the row.
 - Change the colors in the grid view to alternate colors by row.
-

Gantt Views Overview

Available with Accolade Roadmapping, Gantt views can show relationships between elements across a span of time. They can focus the Planning view on a single point in time between multiple delivery plans to accomplish one large task, milestone, or product launch. For example, the design, production, and marketing efforts to launch a new product. The horizontal axis of the view represents a timeline, while the vertical axis categorizes the elements by type or list metric, or by hierarchical relationship.



Create Gantt views that show elements color coded based on different metric values, generating a legend within the view. For example, as you are planning, you use a color coded list metric to indicate the opportunity level for each element in the plan. Within a Gantt view, you can display your elements with that color to visually see where your greatest opportunities are on the timeline.

Creating Gantt Planning Views

Create Gantt views to show how planning elements are related in time. In a Gantt view, you can select whether to view planning information by element type, by list metric value, or by parent-to-child hierarchical structure.

After a Gantt view is created, you can do the following

- Drag an element's start and end dates allowing you to flexibly modify dates within a visual context.





Note: If a calculated metric defines a project start or end date, or both, you cannot change the calculated date by dragging the element. For example, if the calculated metric

defines the start date, you can drag the end date, but you cannot drag the entire element.

- Save the view for access later.
- If you are a Process Designer, flag the view as a public view so other Planners and Process Designers have access to the same view.
- Select specific user roles that see a view by default when they open Innovation Planning.
- After creating a Gantt view, Process Designers and Administrators can create a global link to the view and add it to a menu or to a pod within a layout.







Planners can create and save views for their own use; however the Planning View Designer user role is required to save views for other Planners. Additionally, the Planning View Designer role is required to create new categories to group views.






To create a Gantt planning view:


1. From the **Planning** menu, select **Planning Board**.
2. Navigate to the correct element and child board on which you want to create the view.
You can create a Gantt view of elements that you see on the Canvas, or from an element's child board.
3. Click the Planning Views  panel icon in the top left corner of the page and do one of the following:
 - **To create a new view** - Click  **Add Gantt** at the top of the views list.
 - **To modify an existing view** - Click the name of the saved view, and click  next to the view name to open the Edit Gantt Settings dialog.
 - **To create a new view based on an existing view** - Click  next to the view that you want to copy.
4. In the Add New Gantt dialog, complete the following information to identify and describe the view:

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 Gantt view when saved.
Category	Select the category to which this view belongs. <ul style="list-style-type: none">• 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.




Field	Description
	Views can exist in only one category. Views display within a category to users who have access to the view.
Description	Enter a description of the purpose or nature of the view.
Filters	<p>Select one or more metrics in the Filters drop-down to narrow the view to include only elements that contain certain metric values.</p> <ul style="list-style-type: none"> To filter by a single metric, select the metric from the list. To filter by more than one metric, click  in the drop-down to add additional metrics. <p>After selecting a metric, click  to select the metric values within each metric to display. If you select more than one value, an element must match either value to display in the view. If you want to filter on elements that contain a multi-select metric with multiple values, you must add the metric multiple times to the filter list and select the values individually for each metric.</p> <p> Example</p> <p>For example, you have a metric called Market Impact Assessment assigned to elements that indicates the market impact of the initiative represented in an element. To create a view that focuses on the high market impact initiatives only, select the Market Impact Assessment metric in the Select Filters field, click  and select High to include only elements that have a market impact of high in the view.</p> <p>However, if you have a metric called Action Item Assignments that is multi-select metric, and you want to display elements that have multiple selections for the metric, select the Action Item Assignments metric in the Select Filters field multiple times, and select a single value for each instance of the metric.</p> <ul style="list-style-type: none"> To include a legend that shows the metrics and values that are applied to the view, select the Show Selected Filters check box when selecting filters and values. The legend displays in the top header of the view. Click  to remove a metric from the filter. <p> Elements that do not contain the vertical axis value, but do contain the metric filter values, display in the None section.</p>
Scenario	To view a current scenario created in Portfolio Optimizer, select a scenario.
Display All Items in Date Range	Select the date range in which elements are selected for inclusion in the view. An element's start or end date must fall within the range to be included in the Gantt.

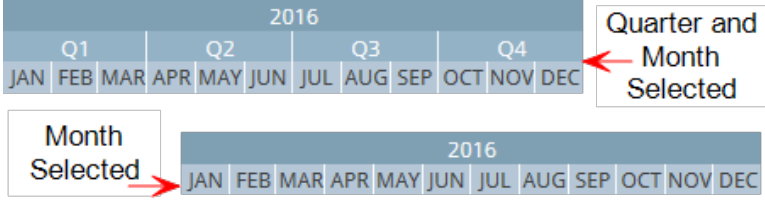
Field	Description
	 Click a day in the calendar to select the date. The timeline dates default to the current calendar or fiscal year and the next calendar or fiscal year, depending on if the Fiscal Year Start Month system parameter is set.
Roll date range forward	<p>The Roll data range forward check box works in conjunction with the fixed dates set for Display All Items in Date Range. Select the Roll data range forward check box and offsets are dynamically adjusted for the start and end dates, thereby maintaining the data range for the Gantt view as the view is updated.</p> <p> For example, if a date range is defined for Feb 15, 2021 - Mar 15, 2021 and the current date is moved to Feb 16, 2021, then, the data range displayed in the Gantt view will be Feb 16, 2021 - Mar 16, 2021.</p> <p>Deselect the Roll data range forward check box and the Gantt chart updates with data for the fixed dates set in Display All Items in Date Range only.</p>
Timeline Highlights	Click  to add a timeline highlight to the view.
Row	<p>Select the type of information you want to display on the vertical axis of the Gantt. This selection determines the sections or rows within the Gantt.</p> <ul style="list-style-type: none"> • Types - The Gantt contains a section for each element type listed in alphabetical order. • Hierarchy - The Gantt contains a section for each of the parent/child level elements. What displays initially is based on what level of the hierarchy you were viewing when creating the Gantt. • A list metric or multi-select list - The Gantt contains a section for each item in the selected metric. Elements are grouped in the section that corresponds to the metric assigned in the element's details. <p>After selecting the type, click  next to the field to select the values within the axis to display. You can select multiple filter values. For example, if you select to view by Types, use the filter icon to select which types to include in the display.</p> <p> Select the Hide empty rows check box to hide empty rows when generating the view.</p>
Span Start and End by Metric	Select Start Date to use the planning element's start date or a date metric to locate the left end of each element on the Gantt timeline. Select End Date to use the planning element's end date or a date metric to locate the right end of each element on the Gantt timeline. When creating a view, the element's start and end dates are selected by default.

Field	Description
	<p data-bbox="516 254 1364 321">To display milestones for the project's start and end, set these fields to metrics that have been designated as milestones.</p> <p data-bbox="540 348 1273 422"> Select the Display dates check box to display the selected dates within the view.</p>

5. Set additional display options to be applied to the view.



Field	Description
Border	<p>Select an option to define a border color legend to identify elements within the Gantt.</p> <ul style="list-style-type: none"> • [None] - The default border type for a Gantt view, this selection does not apply any border colors to the displayed view. • A list metric - Selecting a list metric applies a border color to the element based on the metric assigned to it. The list contains only list metrics that have colors defined for one or more of their list items. <p>For example, as you are planning, you use a color-coded list metric to indicate the opportunity level for each element in the plan. Within a Gantt view, you can display your elements with that color to visually see where your greatest opportunities are on the timeline.</p> <p> In the Show Legends section, select the Border check box to display an interactive legend that identifies what the border colors represent in the view.</p>
Fill	<p>Select an option to define an element color legend to identify elements within the Gantt:</p> <ul style="list-style-type: none"> • Type - The default fill type for a Gantt view, this selection displays the elements in the colors defined for the element type. • A list metric - Selecting a list metric shades an entire element based on the metric assigned to it. The list contains only list metrics that have colors defined for one or more of their list items. <p>For example, as you are planning, you use a color-coded list metric to indicate the opportunity level for each element in the plan. Within a Gantt view, you can display your elements with that color to visually see where your greatest opportunities are on the timeline.</p> <ul style="list-style-type: none"> • A phase metric - Selecting a phase metric shades the phases defined within an element. • Process Stages - This selection displays the project stages using the colors defined in the process model. Separator lines are used to distinguish the ends of the project phases. If no colors are defined, the project is displayed in outline form. <p> In the Show Legends section, select the Fill check box to display an interactive legend that identifies what the element colors represent in the view.</p>
Show Legends	<p>Select one or more from the following options to display interactive legends within the Gantt view.</p> <ul style="list-style-type: none"> • Border - select this check box to display an interactive legend that


Field	Description
	<p>identifies what the border colors represent in the view.</p> <ul style="list-style-type: none"> • Fill - select this check box to display an interactive legend that identifies what the element colors represent in the view. • Milestones - select this check box to display an interactive legend that identifies what milestone dates are represented in the view.
Gates	<p>Select this check box to display any gate dates that have been created for the elements in the view.</p> <p>Gate dates only apply to elements that are based on gated classes, and are displayed in the view using the gate color and shape defined in the process model.</p> 
Phases	<p>Select this check box to display the phases as division lines within the element.</p>  <p>💡 To shade the phases using the colors defined in a phase metric, also select a phase metric in the Fill field.</p>
Milestones	<p>Select this check box to display any milestone dates that have been created for the elements in the view.</p> <p>A milestone metric must be designated as a milestone on the element type, and is displayed in the view using the icon and color defined in the metric definition.</p>  <p>💡 In the Show Legends section, select the Milestone check box to display an interactive legend that identifies what milestone dates are represented in the view.</p>
Time Intervals	<p>Select one or more time intervals to display across the top of the Gantt.</p> <p>Note: The options available depend on the selection in the Chart Scale slider in the view.</p> <ul style="list-style-type: none"> • Years are shown by default. • The Month check box is available for selection if the scale is set to 1 or higher. • The Quarter check box is available for selection if the scale is set to 0.3 or higher.

Field	Description
	<ul style="list-style-type: none"> The Year check box is selected by default, and will display at all scale settings. The Decade check box is available for selection if the scale is set to 0.3 or lower.  <p>If the Fiscal Year Start Month system parameter is set, you will have an option to select whether to align the time intervals by your company's fiscal year or calendar year across the top of the Gantt.</p>
Trim time at start/end of date range or page layout metric	<p>Select this check box to change the start and end date of the Gantt style view to start at the earliest project displayed, and end at the latest project displayed, within the parameters of the set timeline. This improves the view by excluding unmapped dates from the project timeline view.</p> <p>For example, if a date range is defined for January 1, 2021 - December 31, 2021 and the first project of the view does not start until July 15, 2021, then the start date of the view is adjusted to July 15, 2021.</p> <p>Note that the adjusted date for the trim time is not saved to the view settings. Also, if a project is added that starts earlier than the adjusted start date, then the displayed start date will adjust accordingly.</p>

6. (Optional) Set the **Sharing, Viewing and Ownership** settings for the view.



Field	Description
Sort	<p>Select a sort option to apply to the view. The sorting is applied to projects within each individual Gantt swimlane. Each sort option has a default sort order, which can be modified using the Ascending or Descending selection for Sort.</p> <ul style="list-style-type: none"> Default - This is the default selection, which displays projects by project ID. The default sort is in descending order. Project Rank - This selection displays projects by project rank. The default sort is in descending order (starting with the highest ranked projects). Parent - Child - This selection displays projects by parent/child relationships. The parent project displays at the top, with its related children sorted in order of project ID underneath. Default sort order is

Field	Description
	<p>Descending by project ID.</p> <p>If the view includes multiple parent projects, they are also sorted in order of project ID.</p> <ul style="list-style-type: none"> • Alphabetical - This selection displays projects in alpha-numeric order. The default is ascending alpha-numeric order. • Start Date - This selection displays projects in order by project start date. If the swimlane includes events, the event date is treated as a start date for sorting purposes. The default sort is in ascending order. • End Date - This selection displays projects in order by project end date. If the swimlane includes events, the event date is treated as an end date for sorting purposes. The default sort is in ascending order. • A metric - This selection displays projects in order by the project value of the assigned metric. The default sort is in ascending order. <p>Note: If multiple projects have the same sort criteria, for example the same name or start date, these projects will be sorted by project ID within the original sort criteria. New projects are inserted in their respective swimlane in the appropriate position based on the applied sort option.</p> <p> If an existing planning view contains projects that have been manually moved, or if a project is manually moved to a new position and the view is saved, the sort order will display (Modified) next to the sort type. If you select a different sort option and load the view, this Modified sort option will still be available to select. If the view is saved with a non-modified sort order, for example Start Date without any additional project moves, the Modified option will disappear from the drop-down menu.</p>
Ascending Descending	Select if the currently defined sort order is in ascending or descending order. If the sort order is a Modified sort, then the ascending or descending order cannot be changed.
Condense view	<p>Select this check box to display the view in a condensed format, combining multiple elements in rows in order to maximize the number of projects that can be viewed.</p> <p>Note: When selected, the project Sort function is not applied to the view.</p>
Default View for Users	Click  to select users who open this view immediately when they open the Planning Board.

Field	Description
	<p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> 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. <p>A user can have only one default view. If a user currently has a default view, its name displays after the user's name.</p>
Make public	<p>Select this check box to allow all Planners to see this view in the list of saved views, and to allow the view to be set as a global link.</p> <p>A view must have a defined owner in order to be made public.</p> <p> Only Planning View Designers can create public views.</p>
Start/End By Metric For Page Layouts	<p>If these dates are specified, then when viewing the Gantt planning view for a layout, metrics from the project's start and end dates will be used in the display, overriding the dates set in Display All Items Within Date Range</p>

7. (Optional) Set the **Additional Settings** to further establish what displays within the view.

Field	Description
Include parents	<p>Select this check box to include the parent elements in the view, if they meet filter criteria within the current branch of the planning hierarchy that the view displays.</p> <p>The default is unchecked and leaves the parent elements out of the view.</p>
Restrict to current hierarchy	<p>Select this check box to limit the view to only the elements that match the filter criteria within the current branch of the planning hierarchy that the view displays.</p> <p>Clear the check box to display all elements that match the view and filter criteria across the system, regardless of their place in the planning hierarchy.</p>
Save level	<p>If the view displays a child level, select this check box to make the current level of the hierarchy the top level that any user can access in the view.</p>

Field	Description
	Clear the check box to include the top (root) level in this view, regardless of the current level displayed.
Show only my projects	<p>Select this check box to create a view that displays only the projects to which a user is assigned.</p> <p>Selecting My Projects allows Project Managers and Team Members to see only the projects to which they are assigned in the Gantt view. Team Members assigned this view can update element metrics, but cannot modify types, elements, or milestones within the view.</p> <p>Classes associated with planning element types must have the Include in My Projects option set in the class definition for elements using that type to display in a My Project View.</p>
Lock dates when moving spans	<p>Select this check box to ensure when elements are moved across sections, or to a different line within the same section in the Gantt, that only the element moves, and the element dates stay the same.</p> <p>Selecting this option also disables the ability to drag an entire element, or the edge of an element to change its start or end date. Hover over the element and click  to update start and end dates through the element's details.</p> <p>Note: This option does not apply to scenario Gantt views, which are view only.</p>
Show date lines	Select this check box to display a solid vertical line at the mouse pointer (with a tooltip that identifies the date where you are pointing) and a dotted vertical line at today's date.
Show column/row list color	Select this check box to use the color assigned to list or multi-list item metrics as the row and column header colors of the vertical and horizontal axes.
Background color	Use the color picker to select a background color to apply to the view.
Alternate color	<p>Use the color picker to select a color if you want alternate rows or columns to display in a different color.</p> <p>Select the Columns and/or Rows check boxes to turn the alternating row and column colors on and off.</p> <p> If Types is selected for rows or columns, an alternate color is not displayed.</p>

- Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
- (Optional) Apply additional view settings to the view.


- Adjust the time intervals displayed in the view.

Use the slide bar to select the zoom level to display the time intervals closer or farther apart.






Selecting a higher numbered scale expands the intervals to fill more space within the Gantt, and allows visualization of quarters and months within each year. A scale of **0.1** or **0.2** zooms out to display only years, and removes the month and quarter time intervals from the display.



Select the value that provides the best visualization for your roadmap. To drag elements day-by-day, select a scale of **1** or higher. For presentations, select a smaller scale to fit a larger amount of time into the view.

- Click  to adjust the displayed view to fit the maximum horizontal screen width.




The Time Intervals settings will be automatically adjusted to match the Fit to Width selection. Moving the slide bar will adjust the scale and remove the Fit to Width selection.

- Click  to edit the current settings for the view.
- Click  to [display the view](#) in presentation mode.
- Click  to [add annotations](#) to the view.
- Click  to [enter link mode](#) and create or [display element relationships](#) within the view.
- Click  to [download an image](#) of the view.



10. Click **Save** in the top right corner of the view to save your changes to the view.


My Projects View

If you selected the **Show only my projects** options in the **Additional Settings** section, your projects display with statuses, based on their completion and pending due dates. You must be a member of the project team or the Project Manager for projects to display in the view.

-  - All deliverables are complete.
-  - One or more deliverables are in trouble and at risk of not being completed.
-  - The next gate is approaching and one or more deliverables have not been completed.

Notes:

- To make this view available for display within a global link, click  next to the view name to open the Edit Gantt Settings dialog and ensure that the **Make public** check box is selected. Click **Create Global Link**, and enter the settings to finish [creating the global link](#) for the view.
- In Gantt or composite Gantt views, the  icon displays next to the element's name if an element has a relationship that is in conflict. Click the icon to display the details and options for [resolving the conflict](#).


- In Gantt or composite Gantt views, the  icon displayed on the element span indicates a project that is flagged as **In Trouble**.
- If you make any changes to a saved view, be sure to save the view again to ensure your most recent changes are saved.

Working with Elements in Gantt Planning Views

After creating a Gantt view, Planners with the correct rights can create elements directly in the view, move elements to reflect different project start and end dates, and filter and sort the sections of the Gantt to better organize the view.

An element does not display in the Gantt view if any of the following are true:

- The element has neither a start nor an end date. The Gantt can be configured to view by either the start and end date in the element or date metrics in the element.
- The element's start date is after the Gantt's end date or the element's end date is before the Gantt's start date.
- The element does not contain the metric selected for the Gantt's vertical axis.
- You do not have the security assignments to access the element.

As you make changes to element details in the Gantt view and the Canvas view, including changes to dates, titles, links, and metric values, you can revert your changes by clicking  in the top right corner of the view header. The undo functionality does not apply when you delete an element or component such as a planning view. The undo icon is disabled if the change cannot be undone.

Note: Undoing changes is available in the view (Gantt or Canvas) that currently displays. If you navigate away from the view, undo resets to only undo the changes in that view. For example, if you modify dates on an element in the Canvas view, and then display a Gantt view, you can no longer undo the date change made within the Canvas view.


Changing Planning Element Dates in Gantt Views

Planners who are assigned as the element's Team Leader, or Process Managers with Manage Process rights can change the element's start and end dates by dragging the element.


- 💡 If a calculated metric defines the project start date, end date, or both, you cannot change the date by dragging the element. For example, if the calculated metric defines the start date, you can drag the end date, but you cannot drag the entire element.

To change an element's start or end dates by dragging in the view:

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

2. Create a view or display a saved Gantt view.
3. Point to the left or right end of the element.
4. When the cursor changes to , click and drag the end of the element to a new start or end date.


Important! If you change a date on an element that results in violation of a relationship link or dependency, the system alerts you that there is a conflict with the relationship. You can select to break the relationship before continuing with the date change, or change the date even though there is a conflict.

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

You can also change an element's start and dates by moving the entire element to a new location (see below) or by hovering over the element and clicking  to change the element's details. If the **Lock dates when moving spans** option is set for the Gantt view, you can only change the element's dates through the element details.

Moving Elements in Gantt Views

Note: Only the element's Team Leader, or a Process Manager with Manage Process rights can move an element in a Gantt view. Use the **Lock dates when moving spans** option in the Gantt view settings if you plan to move elements between sections, but do not want to change the element dates.

You can change the values of list metrics, date metrics, start dates, and end dates in an element by dragging the element to a different location within the Gantt or by hovering over the element and clicking  to change the element's details.

Using drag and drop, you can do the following:

- If the Gantt view's vertical axis is set to a metric, drag and drop an element to a different metric section in the Gantt to change the metric value for the element.
- In any Gantt view, drag and drop an element to a different point on the Gantt timeline to change the start date and end date. You can also expand an element that represents a span of time to change the duration.
- In any Gantt view, drag and drop an element to a different position on the same line as other elements within the Gantt. For example, you could have multiple elements that show different projects for the same effort, or attributes tied to a single project that have with different metric values.
 - You can move elements next to one another on the same row; however, you cannot stack elements on top of each other.
 - Milestones and phases that extend past an element's start or end dates may overlap another element in the same row.

- If dates change for an element outside of the view, when you open the view, the element displays in a new row in the appropriate position within the row.



Filtering and Sorting Sections

After you have defined a Gantt view and the view is displayed, you can filter the sections within the view without having to redefine the view criteria. Using filters allows you to remove the sections that contain no data so you can focus the view to only the items you want to see. In addition, you can rearrange the sections within the Gantt so they display in an order that is most meaningful to you within the view.



To reorder the sections within a Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Gantt view.
3. Click and drag the section to the new location.
4. Click **Save** in the top right corner of the view to save your changes to the view.

To filter the sections within a Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Gantt view.
3. Click  next to the view name to open the Edit Gantt Settings dialog.
4. Click  next to the **Row** field to select the filters to apply to the view.
5. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
6. Click **Save** in the top right corner of the view to save your changes to the view.

Notes:


- Hovering over an element's gate or milestone icons will display the project name, gate or metric name, and the date. These metrics can be changed by hovering over the element and clicking  to change the element's details.
- In a Gantt or composite Gantt view, the  icon displayed on the element indicates a project that is flagged as **In Trouble**.
- In a [hierarchy Gantt view](#), if you move a parent section, the child sections of that parent move with it. You can move child sections within their parent; however, you cannot move a child section to a different parent.
- In a [hierarchy Gantt view](#), you cannot change an element's type by dragging it in the Gantt, nor can you drag an element to a child section or to a different parent within the Gantt.

Modifying Gate Dates in Gantt Planning Views

If an element is based on a gated class, Process Managers with Manage Process rights, or an element's assigned Team Leader, can update the element's gate dates directly from the Gantt view.

Note: The **Allow Project Owner to Set Gate Dates** parameter must also be set to **1** for an assigned Team Leader to be able to modify the element's gate dates.

To modify an element's gate dates in a Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Gantt view.
3. Hover over the element and click  to open the element for editing.
4. In the **Details** tab, click each gate date field and select the new gate date.
5. Click **Done** to apply your changes.

Notes:

- If the Gantt view [displays project gate dates](#) in the view, hovering over an element's gate icons will display the project name, gate name, and the date.



Displaying Milestone and Gate Dates in Gantt Planning Views

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




When included in a Gantt view, icons above the element span indicate the gate and/or milestone dates defined for the element type:

- Gate dates are represented using the [gate icon shape and color](#) as defined in the process model graphic.
- Milestone dates are represented using the icon assigned in the metric definition, and can be further customized by adding a list metric to define the icon color based on the metric's value in the project.

 Hovering over an element's gate or milestone icons will display the project name, gate or metric name, the date, and metric name and value that defines its displayed color (if applicable). These metrics can be changed by hovering over the element and clicking  to change the element's details.

To display date and/or milestone dates in a Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Gantt view.
3. Click  next to the view name to display the additional view settings dialog.
4. In the Show Objects section, select one or both of the following options:
 - Select the **Gates** check box to display any gate dates that have been defined for the elements included in the view.
 - Select the **Milestones** check box to display any milestone dates that have been defined for the elements included in the view.
5. *(Optional)* In the Show Legends section, select the **Milestones** check box to [add a legend to the view](#).
6. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
7. Click **Save** in the top right corner of the view to save your changes to the view.

Notes:

- The milestone legend will display all icons in black, regardless of the milestone icon colors displayed within the planning view.

Displaying Phases in Gantt Planning Views

A phase within an element type can represent a stage of a project, such as Discovery, Design, Build, and Testing, or any time frame you define. If a planning element has defined phases, you can create a Gantt view to display the phases within the elements, with or without phase shading.

In the example below, the element displays in its default color assigned to its type, with phases displayed.




In the example below, the element displays with a phase metric selected as the phase legend. Note that the final phase displays as white. This phase within the element's phase definitions does not contain a selected list item from a phase metric.



To display phases within an element, a list metric defined as being available to phases must be added to an element type, and the phase names and end dates must be set for a planning element. To select a legend to use to shade the phases, the phase metric must have colors assigned to the list items, and the phases within the element must have a metric value selected within the phase definition.

To display phases in a Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Gantt view.
3. Click  next to the view name to display the additional view settings dialog.
4. In the Show Objects section, select the **Phases** check box to include the phases within each element in the Gantt view.
5. *(Optional)* In the **Fill** field, select a phase metric to [shade the phases within the elements based on the colors defined in a phase metric](#).
6. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
7. Click **Save** in the top right corner of the view to save your changes to the view.

Highlighting Dates in Gantt Planning Views




Within a Gantt or composite Gantt view, Planners can highlight specific dates or date ranges in a view that are important to the overall view, but are not directly associated with any specific project timeline. Highlights can help Planners and other users quickly identify and plan for potential impacts in order to manage project timelines accordingly.


For example, a user may select to add a date range highlight to views in order to indicate a particular season, such as the Christmas and New Year's holidays, that represents limited resource availability within their organization during that period.




Note: These highlight dates are defined in the view settings, and are independent of the gate and milestone dates on projects.

To add highlights in a Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. Click  next to the view name to display the additional view settings dialog.
4. In the Timeline Highlights section, click  to open the Edit Timeline Highlights dialog.
5. Click  to add a highlight.
6. Enter a **Name** to identify the highlight and display in the view.
7. In the **Dates** fields, select the start and end dates for the highlight.


 Highlight a single date in the view by selecting a start date only, and leaving the end date field blank.

8. Repeat steps 5-7 to add additional highlights as necessary.
9. Click **Done** to close the Edit Timeline Highlights dialog.

The total number of view highlights will display next to the  icon in the dialog.

10. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
11. Click **Save** in the top right corner of the view to save your changes to the view.

Notes:

- To delete a timeline highlight, open the Edit Timeline Highlights dialog, and click  next to the highlight to be deleted.

Viewing Child Elements in Hierarchy Gantt Planning Views

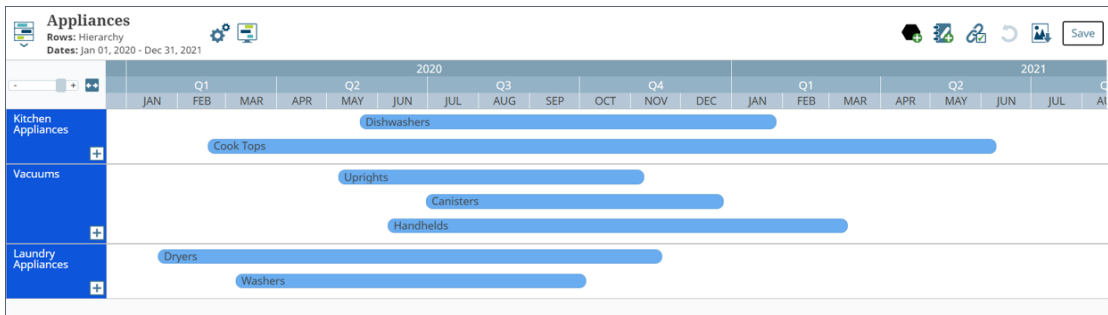
While in a Gantt view, you can select to display the Gantt in a hierarchy, which allows you to move a parent element's child elements to the vertical axis, nested under their parent. Viewing the Gantt with a hierarchy of nested elements provides a way to review all elements in hierarchical relationship within the context of the other planning elements in your organization.

 Example


A company contains business units for Kitchen Appliances, Laundry Appliances, and Vacuum Cleaners. Each business unit contains product areas, and each product area contains product lines. For example, the Kitchen Appliances business unit contains a Cook Tops product area, which contains Induction, Gas, and Electric product lines. As a Planner, you want to view the innovation road map for all

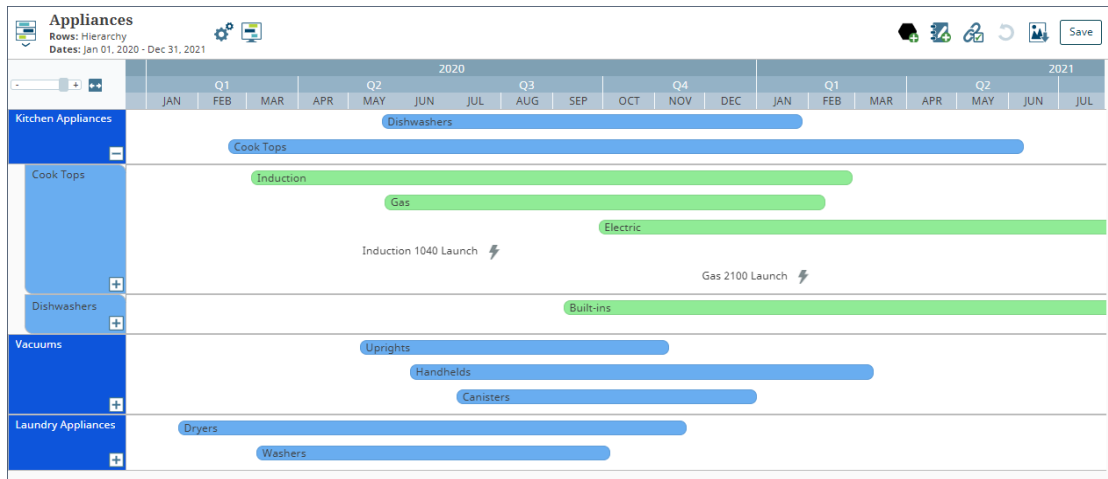
three business units with the ability to drill down into the product lines and product areas of each within a single Gantt view.

Create a Gantt view, selecting **Hierarchy** as the **Row** to show each business unit in a row within the Gantt.



Note: The illustration above shows the top-most level of a Gantt in hierarchy mode, created at the parent level of the hierarchy. The top-most level in your Gantt view may not be the highest level in the parent/child hierarchy. The view is based on where you were in the hierarchy child boards when you created the Gantt.




From within the Gantt, hover over the element and click  to view the child elements below the parent.




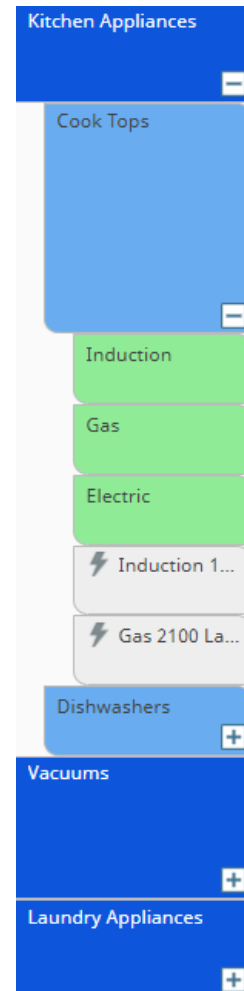
You can continue to nest additional levels of child elements as sections in the Gantt.

You can select to change section colors, start and end dates, and use legends as you analyze your innovation plan. In addition, you can access each element's details and other options using the controls in the elements listed along the vertical axis.

To view child elements in a single hierarchy Gantt view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. Click  next to the view name to open the Edit Gantt Settings dialog.
4. In the **Row** field, select **Hierarchy**.
5. *(Optional)* Update additional view settings, as necessary.
6. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
7. Continue with one of the following view options
 - To view the hierarchy board for an element in the Gantt, hover over the element and click .
 - To nest the child elements within a section below the parent, click  in the parent section.

The child rows become sections in the Gantt view. The parent section in this case could be a grandparent etc. within the hierarchy. It is the element level that contains the child elements. Elements that do not include dates are not included in the Gantt.
 - To move the elements back into their parent's section, click  in the parent section.
8. Click **Save** in the top right corner of the view to save your changes to the view.

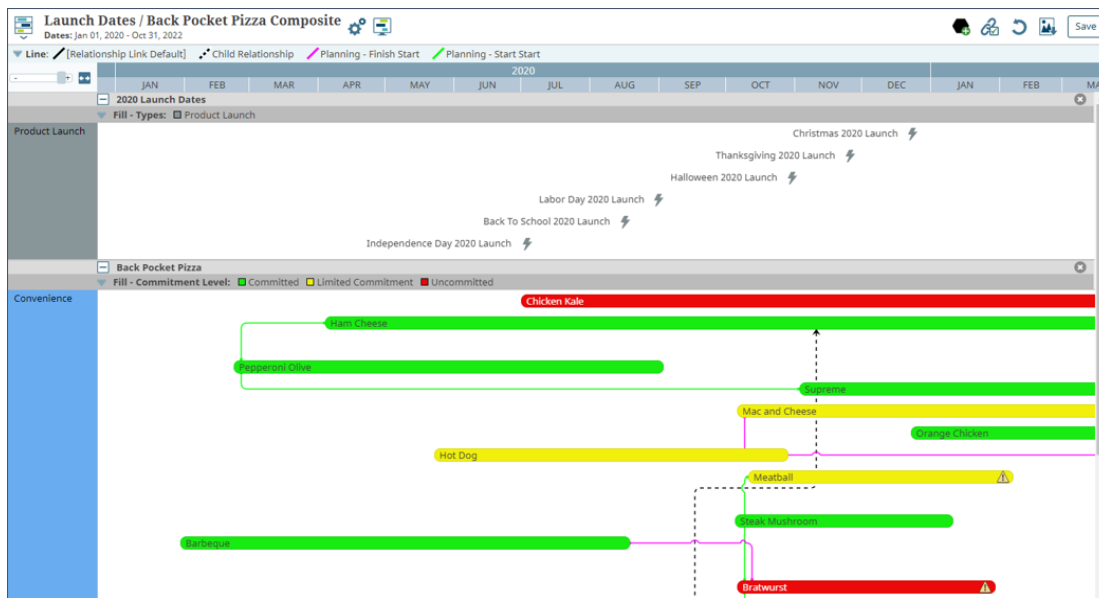


Notes:

- If you select metric filters in a hierarchy Gantt, a child element's parent element must have the metric and the selected values displayed for the child element to be brought into the hierarchy, if it was not originally displayed within the hierarchy view. If the child element contains the metric and the selected value, but the parent element does not, the child element is not brought into the hierarchy when you select metric filters. However, child elements display underneath their parent when you expand a parent in the hierarchy if they have a parent/child relationship, regardless of the filter setting.
- If you delete a planning element with children in a hierarchy, all the child elements move up one level.
- If you move a parent section, the child sections of that parent move with it. You can move child sections within their parent; however, you cannot move a child section to a different parent.

Combining Gantt Views into Composite Views

To provide additional visibility into your company roadmaps and innovation plans, create a composite or combined view that includes multiple Gantt views in a single view. Composite views allow Planners to review and download multiple roadmaps from a single location, without having to switch back and forth between views. Each Gantt within the composite displays as it is defined in its original view, including its legend, level, relationships, and color selections. A composite view contains a single timeline that is initially defined by the Gantt that displays at the top of the composite, but can be changed using the composite Gantt view settings. Save composite views as private or public for access later and create global links to the view.





Consider the following when creating composite views:


- For optimal performance, composites should contain no more than 10 Gantt views.
- Likewise, composites should contain no more than 250 total elements across all views within the composite. If you exceed 250 elements, you may experience slower loading times.

💡 To view relationships across a composite view, see ["Relationships in Composite Gantt Views"](#) on page 61.

To combine Gantt views in a composite view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. In the saved views list, move the mouse over the icon of the Gantt or Hierarchy Gantt view you want to add to the composite to display a  cursor, and click and drag the view onto the current displayed Gantt. The added view displays at the bottom of the composite.

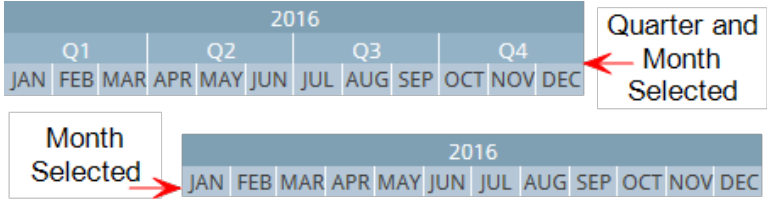
💡 A composite view can contain individual Gantt views; however you cannot add a composite view to a composite view. To move individual views within a composite view, move the mouse over the view's title bar to display a  cursor, and drag the view to the new location within the composite.


4. Click  next to the view name to open the Edit Composite Settings dialog.
5. Set the following to establish global settings for the composite view:

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 composite view when saved.
Category	<p>Select the group to which this view displays in the Saved View list.</p> <ul style="list-style-type: none"> • 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. <p>Views can exist in only one category. Views display within a category to users who have access to the view.</p>
Description	Enter a description of the purpose or nature of the view.
Display All Items in Date Range	<p>Select the date range in which elements are selected for inclusion in the view. An element's start or end date must fall within the range to be included in the Gantt.</p> <p>💡 Click a day in the calendar to select the date. The timeline dates default to the current calendar or fiscal year and the next calendar or fiscal year, depending on if the Fiscal Year Start Month system parameter is set.</p>
Roll date range forward	<p>The Roll data range forward check box works in conjunction with the fixed dates set for Display All Items in Date Range. Select the Roll data range forward check box and offsets are dynamically adjusted for the start and end dates, thereby maintaining the data range for the Gantt view as the view is updated.</p> <p>💡 For example, if a date range is defined for Feb 15, 2021 - Mar 15, 2021 and the current date is moved to Feb 16, 2021, then, the data range displayed in the Gantt view will be Feb 16, 2021 - Mar 16, 2021.</p> <p>Deselect the Roll data range forward check box and the Gantt chart updates with data for the fixed dates set in Display All Items in Date Range only.</p>

6. Set additional display options to be applied to the view.

Field	Description
Show Legends	<p>Select one or more from the following options to display the composite Gantt view's collective legends.</p> <ul style="list-style-type: none"> • Border - select this check box to display a border color legend that identifies what the border colors represent in the view. • Fill - select this check box to display an element color legend that identifies what the element colors represent in the view. • Milestones - select this check box to display an interactive legend that identifies what milestone dates are represented in the view.
Time Intervals	<p>Select one or more time intervals to display across the top of the Gantt.</p> <p>Note: The options available depend on the selection in the Chart Scale slider in the view.</p> <ul style="list-style-type: none"> • Years are shown by default. • The Month check box is available for selection if the scale is set to 1 or higher. • The Quarter check box is available for selection if the scale is set to 0.3 or higher. • The Year check box is selected by default, and will display at all scale settings. • The Decade check box is available for selection if the scale is set to 0.3 or lower.  <p>If the Fiscal Year Start Month system parameter is set, you will have an option to select whether to align the time intervals by your company's fiscal year or calendar year across the top of the Gantt.</p>
Trim time at start/end of date range or page layout metric	<p>Select this check box to change the start and end date of the Gantt style view to start at the earliest project displayed, and end at the latest project displayed, within the parameters of the set timeline. This improves the view by excluding unmapped dates from the project timeline view.</p> <p>For example, if a date range is defined for January 1, 2021 - December 31, 2021 and the first project of the view does not start until July 15, 2021, then the start date of the view is adjusted to July 15, 2021.</p>


Field	Description
	Note that the adjusted date for the trim time is not saved to the view settings. Also, if a project is added that starts earlier than the adjusted start date, then the displayed start date will adjust accordingly.
Timeline Highlights	Click  to add a timeline highlight to the view.

7. (Optional) Set the **Sharing, Viewing and Ownership** settings for the view.

Field	Description
Default View for Users	<p>Click  to select users who open this view immediately when they open the Planning Board.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> 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. <p>A user can have only one default view. If a user currently has a default view, its name displays after the user's name.</p>
Make public	<p>Select this check box to allow all Planners to see this view in the list of saved views, and to allow the view to be set as a global link.</p> <p>A view must have a defined owner in order to be made public.</p> <p> Only Planning View Designers can create public views.</p>
Start/End By Metric For Page Layouts	<p>If these dates are specified, then when viewing the Gantt planning view for a layout, metrics from the project's start and end dates will be used in the display, overriding the dates set in Display All Items Within Date Range</p>





8. (Optional) Set the **Additional Settings** to further establish what displays within the view.

Field	Description
Lock dates when moving	Select this check box to ensure when elements are moved across sections, or to a different line within the same section in the Gantt, that only the element moves, and the element dates stay the same.


Field	Description
spans	Selecting this option also disables the ability to drag an entire element, or the edge of an element to change its start or end date. Hover over the element and click  to update start and end dates through the element's details. Note: This option does not apply to scenario Gantt views, which are view only.
Show date lines	Select this check box to display a solid vertical line at the mouse pointer (with a tooltip that identifies the date where you are pointing) and a dotted vertical line at today's date.

9. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
10. *(Optional)* Apply additional view settings to the view.
 - Adjust the time intervals displayed in the view.
Use the slide bar to select the zoom level to display the time intervals closer or farther apart.

Selecting a higher numbered scale expands the intervals to fill more space within the Gantt, and allows visualization of quarters and months within each year. A scale of **0.1** or **0.2** zooms out to display only years, and removes the month and quarter time intervals from the display.

💡 Select the value that provides the best visualization for your roadmap. To drag elements day-by-day, select a scale of **1** or higher. For presentations, select a smaller scale to fit a larger amount of time into the view.
 - Click  to adjust the displayed view to fit the maximum horizontal screen width.
The Time Intervals settings will be automatically adjusted to match the Fit to Width selection. Moving the slide bar will adjust the scale and remove the Fit to Width selection.
 - Click  to [display the view](#) in presentation mode.
 - Click  to [display element relationships](#) within the view.
 - Click  to [download an image](#) of the view.
12. Click **Save** in the top right corner of the view to save your changes to the view.


Notes:

- To make this view available for display within a global link, click  next to the view name to open the Edit Composite Settings dialog and ensure that the **Make public** check box is selected. Click **Create Global Link** and enter the settings to finish [creating the global link](#)

for the view.

- If a user changes and saves the project order within an individual view included in the composite view, either by [applying sort options](#) or moving projects manually in the view, these changes may not reflect in a composite view whose project order has also been modified. If you do not see your changes reflected in the composite view, you will need to delete and re-add the individual view that was changed.

If a user changes and saves the project order within a composite view, these changes will reflect in the composite view, but will NOT be reflected in the individual planning views.

- As you make changes to elements within views in a composite view, those element changes are saved with the element itself; therefore, the changes reflect in all the views within the composite and the original views that make up the composite.
- To display a composite view [in a condensed format](#), all individual planning views included in the composite must have the **Show condensed view** check box selected.
- To delete a Gantt view from the composite view, click  in the Gantt title bar within the composite view and save the view.

Scenarios in Gantt Views

Scenarios created in Accolade Portfolio Optimizer are saved versions of project data that Portfolio Managers use to create and edit completion and resource plans for projects within their portfolio. Scenarios are used for comparison to determine the best possible plan to complete projects and initiatives. If your company runs both Portfolio Optimizer and Innovation Planning, Planners can use the Gantt view within Innovation Planning to see a visual representation of a scenario.


Note: Resource data within a scenario is currently not available in Innovation Planning

The following are required to create a Gantt view, edit scenario data, or open a saved view that contains scenario data:

- Accolade Portfolio Optimizer must be enabled.
- You must have the Planner user role and must also have **Load Scenario** rights for Portfolio Optimizer.
- If you wish to edit scenario data in the Gantt view, you must first enable the "Allow updates to scenario data in Accolade" option.

Projects within the scenario display in the Gantt if the following are true:



- They are in a class that is included in planning.
- They fit within the parameters set within the view. For example, if the view filters on a metric, projects in the scenario that do not have that metric are not included in the display.

 Phase metrics used for legends in scenario Gantt views will not display if the corresponding matrix is not [defined as available to Portfolio Optimizer](#). Set the matrix to **Show** in the **Available to Portfolio Optimizer** field to enable the phase metric legend to display.


- You have [access to view the project](#).


To create a Gantt view with a scenario:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved Gantt view.
3. In the **Scenario** field, select the scenario to view.
Scenarios available for selection include:
 - All public scenarios.
 - All private scenarios that you created.
 - All private scenarios on which you are an editor.
4. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
5. Click **Save** in the top right corner of the view to save your changes to the view.

 **Save Scenario** Portfolio Optimizer rights are not required to save a view that contains scenario data. The  icon next to a view in the **Saved Views** list indicates the view contains scenario data.

To view relationships between planning elements within a scenario:

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

Important! If there are relationships included in the view that have date conflicts, the  icon will display in the dialog next to the relationship types with conflicts.

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

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

This list only displays the planning elements that display in the current view. To select all elements within the view, select **Check All** at the top of the drop-down list.

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

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

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

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

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



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

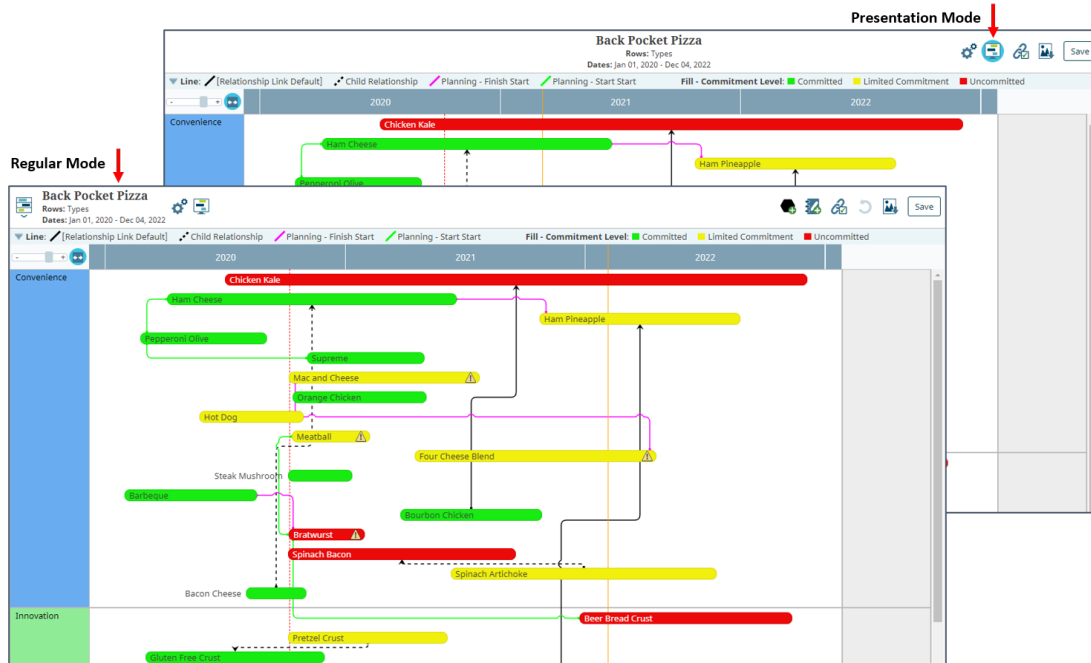
7. Click the **Line legend** check box to display the key that identifies what relationships the line colors in the view represent.

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

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


Displaying Gantt Views in Presentation Mode

Display any type of Gantt view (Hierarchy Gantts, composite Gantts, etc.) in presentation mode, which displays the view without the navigation pane, view settings, or Accolade menu and title bars.







Saving views in presentation mode can be helpful when creating views as global links for users that do not require the additional navigation tools, when adding the view as the content of a pod in a page layout, or when presenting the contents of a view on a screen during a meeting.

To display a Gantt view for a presentation:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. In the view header, click  to display the view in presentation mode.


In presentation mode, the view navigation tools are available in the top right corner of the view header.

To edit the view, select from the following options:

- Click  to edit the view settings.
 - Click  again to switch the view back to regular mode.
 - Click  to edit the **element relationships** displayed within the view.
 - Click  to **download the view**.
4. Click **Save** in the top right corner of the view to save your changes to the view.

When the view is saved in presentation mode, it will default to presentation mode when it is next opened.



To [create a link](#) to a view that displays in presentation mode, click  to display the view details and click **Create Global Link**. When users with access to the view display the view using the link, or when the link is placed in a pod within a page layout, the view displays in presentation mode.


Notes:

- Clicking on a specific element with presentation mode [displays the selected element and its relationships](#), and hides all other elements and relationships.

Exercises - Creating Gantt Views

Try out what you have learned!



- Create a Gantt view that displays elements for the next 5 years.
 - Note the dates of any element and change the end date by dragging the right side of the element.
 - Change the element dates back using the  to access the element details.
 - Pin an element's details to the far left side of the Gantt view.
 - Create a second Gantt view and combine with the first Gantt to create a composite Gantt view.
-

Planning Element Relationships

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

Links between elements can have the following dependency relationships:

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

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

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

Creating Relationships Between Planning Elements

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



Creating Links Between Planning Elements in Any Level

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



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

To create a link between planning elements in any level:

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



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

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

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

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

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


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


Creating Links in Planning Views

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

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

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

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

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

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


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

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



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

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

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

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



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

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

Using Auto-Linking Rules to Create Relationships

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

Notes:

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


Relationship links can also be deleted by clicking on the source element and drag a link line to the target element again. In the Link Types dialog, clear the check box of the link type you want to delete and click **OK**. All links of that type between the two elements are deleted.



- In the Canvas view, if you create a link with no dependency the linked to element moves to the child board.
- If you have a large number of relationships to create or update in Innovation Planning, consider importing the relationships using the project link data import utility.

Displaying Relationships Between Planning Elements

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

To display relationships between elements in individual planning views:

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

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

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

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

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

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

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

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

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


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



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



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

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

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

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



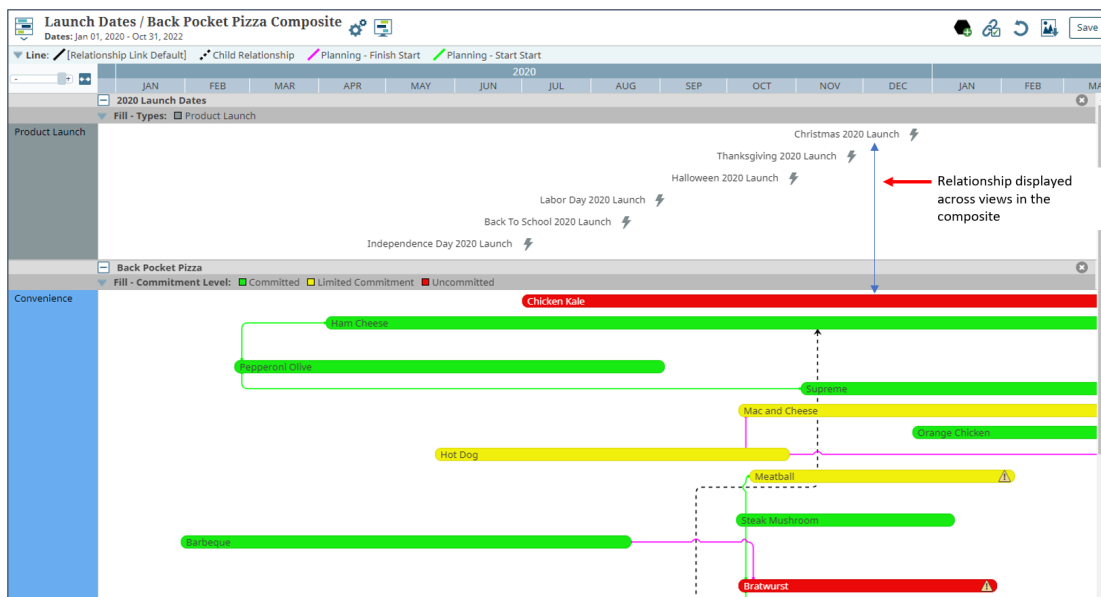
To view a planning element's relationship links, hover over the element and click . Information about an element's links can also be viewed on the [element's Relationships tab](#), or on the **Related Projects**  page of the associated project.

Relationships in Composite Gantt Views


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



In a composite Gantt view:

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



To display relationships between planning elements across composites:

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

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


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

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




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

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

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

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


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

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

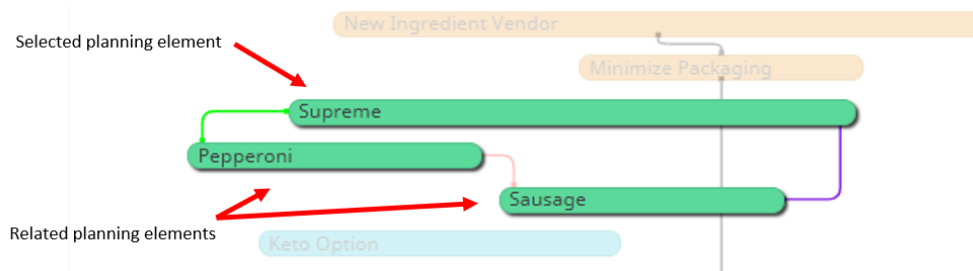
Viewing Everything Related to a Planning Element

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



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

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

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




Notes:



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



Relationship links can also be deleted by clicking on the source element and drag a link line to the target element again. In the Link Types dialog box, clear the check box of the link type you want to delete and click **OK**. All links of that type between the two elements are deleted.

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











Resolving Relationship Conflicts Between Planning Elements

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



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


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

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


1. From the **Planning** menu, select **Planning Board**.
 2. Create a view or display an existing view.
 3. Click  in the upper right corner of the page to open the Show Relationships dialog.
 4. The  icon will display in the dialog next to the relationship types that have date conflicts. Click  next to each warning to display the relationship type conflict details, and select one of the following options:
 - Adjust one or both of the two specified dates that are creating the conflict. Note that adjusting a date will apply the date change to the project, and may impact other relationships or dependencies. Once you click **Done** and close the dialog, this date change is applied to the project, but the date change can be undone by clicking  in the view header.
-  A message displays at the bottom of the dialog if new conflicts are created by date changes. Clicking  **Refresh List** will refresh the list, and new conflicts will display within the dialog with  next to the relationship type.
- Click  to delete the relationship link between the two projects in conflict.
- If you delete the link in error, click  in the dialog to reapply the relationship link to the displayed projects. Once you click **Done** and close the dialog, the link deletion is applied to the project and the link must be manually recreated.
- Ignore the conflict and load the selected relationships. Relationships in conflict will continue to display the  icon next to the element's name in the view.
5. Click **Done** to save your changes and display the selected relationships.


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


1. From the **Planning** menu, select **Planning Board**.
 2. Create a view or display an existing view.
 3. Click  to open the Manage Relationships dialog and display the element's relationship conflicts.
-  Clicking on the relationship line between the two elements in conflict will also open the dialog for review and editing.
4. Select one of the following options:


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



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

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

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

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

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


Notes:

Adding Annotations to Planning Views

Use annotations to add contextual notes and other information to Grid and Gantt views. For example, you may add notes about what is contained within the view, specific elements within a view, or notes for others if the view is public. Annotations display within the view and are available for anyone with access to the view to see. Annotations are also included when the [view is downloaded](#) as an image.


Anyone can add and place an annotation in a view; however, annotations are available only in Grid and single Gantt views and are not available in composite Gantt views or in the Canvas view.

To add an annotation to a view:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. Click  in the upper right corner of the page and drag the annotation to the view.
4. In the **Annotation** box, click to enter the annotation text, and click **OK**.
5. Do any of the following with the annotation:
 - Drag the lower right corner to re-size, as needed.
 - Click in the box and drag it to a new location in the view.
6. Click **Save** in the top right corner of the view to save your changes to the view.

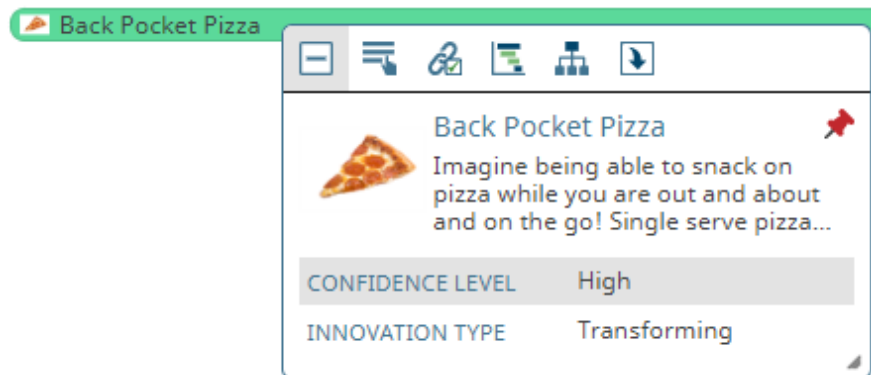
Note: Annotation positions in a view are automatically saved., and anyone with access to the view can move the annotation to a new location. Therefore, an annotation may display in a different location when you open a saved view.

Notes:

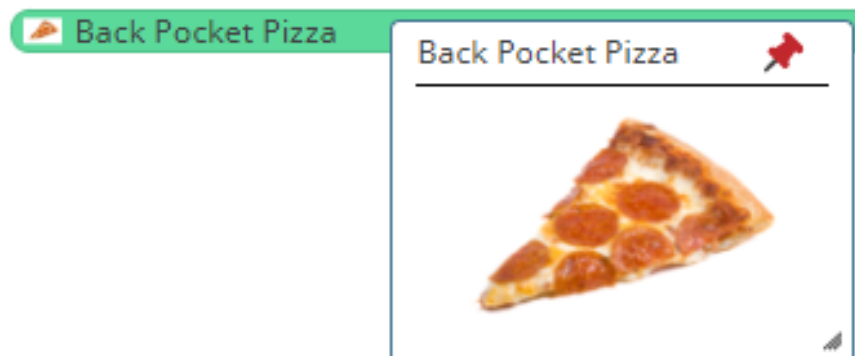
- Annotations are automatically saved when added to the view, and anyone with access to the view can see the annotation.
- To edit an annotation, click in the annotation text, edit the content, and click **OK**. To delete an annotation, click  in the Annotation box. You can only edit or delete annotations that you created.

Pinning Element Details and Images

Views can have many elements and screen size can limit the amount of an element's name that displays within the view, and names may not provide enough information to fully identify the element's purpose within a plan. Using the popup that displays when you hover over an element, you can display the element's full name, description, and metrics indicated as favorites within a view.





In addition, you can pin an element's expanded image to the view:



Pinned popups save with the view, and are part of downloaded view images, providing additional context for the elements within a view.

To pin an element's details or image:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. Do one of the following:
 - Hover over the element's name and click  to display the full project name and description.
 - Click the thumbnail image to display it in a popup.
4. Do any of the following with the popup:
 - Click  in the popup to pin it to the view.
 - Drag the lower right corner of the popup to re-size, as needed.
 - Click the popup to drag and drop it to a new location in the view.
5. To save the pinned popup with the view, including its location and size, click **Save** in the top right corner of the view to save your changes.

Using Element Legends in Planning Views

Color-coded legends offer a visual way to see values you have assigned to planning elements, while still being able to see the planning elements in a Grid or Gantt view. Using list metrics with defined colors, Planners can create planning views that show elements that are color-coded based on the element's metric value, generating a legend within the view.

In addition to shading an entire element, color legends can also be used to add identifying color borders to elements based on these same metric values, or to [shade the phases](#) within an element based on the value assigned to an element's phases.

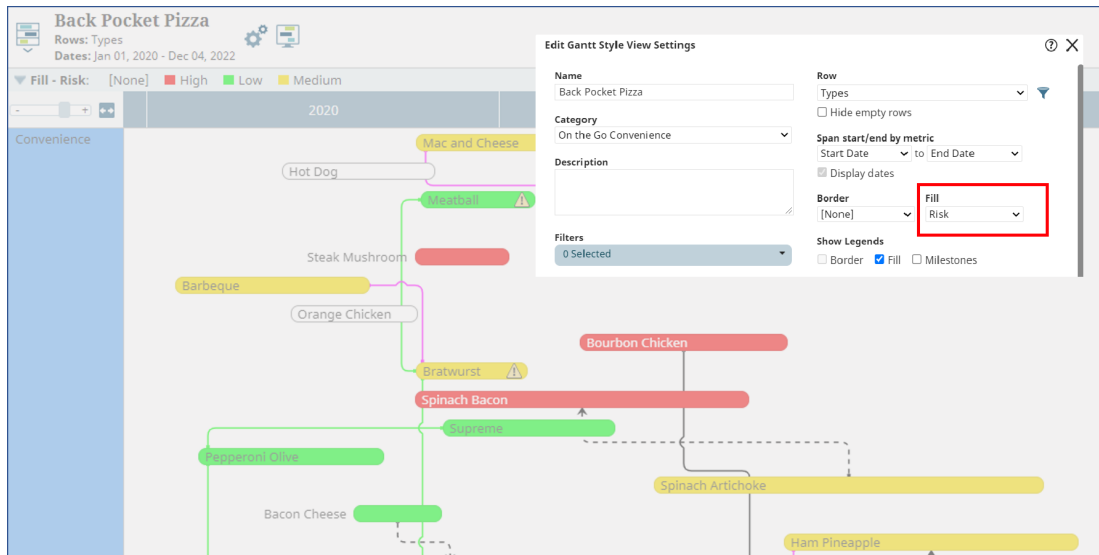
Example

As you are planning, you use two color-coded list metrics that are assigned to your planning element types:

- **Risk** - Indicates the completion risk for each element in your innovation plan. The list metric values include Low (color-coded green), Medium (color-coded yellow), and High (color-coded red).
- **Opportunity** - Indicates the opportunity level within the market for each element in your innovation plan. Your list metric values include Limited (color-coded blue), Neutral (color-coded purple), and Major Impact (color-coded red).

As you create your innovation plan, select the **Risk** and **Opportunity** level for each planning element. When you create a Gantt view, select to display the elements in the view color coded for Risk or for Opportunity.

The **Fill** selection displays the elements in the colors defined for the element type. Selecting the **Risk** list metric updates the elements in the Gantt to reflect the color of the assigned Risk value, and an interactive legend displays within the view that identifies what the element colors represent.



Note: Although the example represents elements legends as used in a Gantt view, they can be used in a similar fashion within Grid views.

To define element legends for use in planning views:

1. From the **Planning** menu, select **Planning Board**.
2. Add list metrics to planning elements and assign each list item a color.
Only list metrics with colors defined for one or more of their list items display as legend options, including metrics set as **Available to Phases**.
3. Add planning elements to the Planning Board.
4. Assign the list value for the list metrics available to that element type.
5. Create a view or display a saved view.
6. Select the list metric you want to use for one or both of the available fields:
 - For Gantt views, make selections in the **Border and/or Fill** fields.
 - For Grid views, make a selection in the **Border** field.
7. (*Optional*) In the Show Legends section, select the **Border** and/or **Fill** check boxes to include interactive legend(s) within the view.
8. Click **Create** to display a new view, or **Refresh View** to apply the changes and refresh an existing view.
9. Click **Save** in the top right corner of the view to save your changes to the view.


Using Interactive Legends in Planning Views

When Fill and/or Border legends are used in planning views, they include an interactive legend that helps users identify what the colors in the view represent.

- 💡 When the **Milestones** legend option is selected in a Gantt planning view, an interactive legend will display that indicates what the milestone shapes in the view represent. While the functionality of a milestone legend is the same, the icons all display in default black, regardless of the actual milestone colors displayed in the view.

Elements that display white either do not contain the list metric selected for the legend, or the assigned item list does not contain a color assignment. The **[None]** value displayed in the interactive legend is also an indication of these conditions

The following options can be used to modify all planning view legends:

- Click  to expand or collapse the legends in the view as necessary.
- Clicking on a legend item will hide the corresponding elements from the view, and the legend item will display with a strikethrough. Clicking on a strikethrough legend item will remove the strikethrough and display the corresponding elements.

Downloading Planning Views as Images

Download Canvas, current or saved Grid and Gantt views, or project Time Views to an image file for embedding into other applications.

The image file includes the entire view, including portions of the view that you may have to scroll to when viewing within Innovation Planning. However, there is a limit to the image size you can download based on browser type and environmental conditions such as browser version and graphics capability. If the image you download is cropped and does not include the entire view, try creating the view with different parameters. For example, in a Gantt view, shorten the timeline and filter the vertical axis.


- 💡 The image to be downloaded will be based on the displayed view, so ensure all required components, such as relationship lines or legends, are visible. To include full element names and descriptions or an element's image within a downloaded image, view and pin the associated popup in the view before downloading the image.

Use image editing software to re-size images after the download is complete.

To download a planning view as an image:

1. From the **Planning** menu, select **Planning Board**.
2. Display the planning view you want to download.

- 💡 To download an image of a specific element and its relationships, [select the element to highlight it](#) before downloading the image.

3. Click  in the upper right corner of the page to open the Download Image dialog.
4. From the **Size** drop-down, select the size or ratio at which the view elements and images download.

Selecting a percentage will download the entire view at the selected percentage value.


Selecting a ratio, such as 3:2, places a dotted outline box in the preview panel. The box defines the image content to be downloaded, and can be moved or resized based on the selected ratio to highlight different areas of the view.

If a ratio is selected, use the **Preview** slider selection to zoom in or out of the view when selecting the area to be downloaded.

5. (Optional) Use the following options to modify the view:

Note: The options available are dependent on the type of planning view being downloaded.

- In the **Select Rows** and/or **Select Columns** drop-down lists, select specific elements to be included in the view.
- Adjust the view's **Start Date** and/or **End Date** values to change the time period to be included in the view.

 Adjustments to the start and end date values are applied to the downloaded image only, and are not saved to the original view.

- Select the **Show Legends** check box to include the view's legends in the downloaded image.

Although the legends will not appear in the Preview panel, the downloaded image will include all legends that are currently selected to be included in the view's settings.



If the view does not include displayed legends, or a ratio has been selected for the download size, this check box is disabled.

6. If changes were applied in step 5, click **Refresh Preview** in the display panel to apply the changes to the current preview.
7. Click **Done** to download the image.

By default, the image downloads automatically to a temporary Internet files directory. Saved Grid and Gantt views are named *viewname.png*. Views that are not saved, such as the current Canvas view, are saved as *viewtype.png*. For example, *Canvas.png*.

Once the download is completed, the file can be renamed as necessary, and can be saved to a more accessible location.

Notes:

- To download an individual project's Gantt timeline, hover over the element and click  to view the project's [Time View](#), then click  from within the dialog.


Adding Planning Views as Global Links


Planners who are also Process Designers can create a menu item (global link) to a saved, public Gantt or Grid view that displays on the Accolade menu bar for multiple users based on their user role. Include a link to a Gantt or Grid view under an Accolade menu, such as the Planning menu, or create a custom menu to include view links and other global links. A Gantt or Grid view must be a Public view to create a link to the view.



In addition, views added as global links are available to embed in a pod within a page layout, which then renders the view within the layout. Defining global links for this purpose can be helpful when building dashboard pages for projects, or to provide insight to a project manager about how their project relates in time to other projects. You must be a Process Designer or an Administrator to create a page layout.

To add a planning view to the Accolade menu bar:

1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. Click  next to the view name to display the additional view settings dialog and click **Create Global Link**.
4. Complete the following information about the link to the view:


Field	Description
Name	Enter the name that displays as the menu selection for the link to the view.
System Name	Enter the system name for the link to the view.
Menu	Enter the Accolade menu or other menu under which the global link displays. For example, if you want the view available under the Planning menu, enter Planning in this field. To add custom menu, enter the custom menu name.
Link	The field displays with the link that displays the view.
Embed	This check box is n/a for planning view global links.
Landing	This check box is n/a for planning view global links.
Default Home	Select this check box to make this the designated home page for selected users. For users with multiple roles, the first link with a role match in the list of defined global links determines the users' default home page.  A home page defined by the user profile settings will take precedence over the global link home page setting.

Field	Description
Roles	<p>Select the user roles to which you want to make this link available. The selections in this list also determines who sees the link as their landing page within Innovation Planning.</p> <p>Users not assigned the selected roles do not have access to the global link in the menu, and the content of the link within a pod in a layout does not display.</p>

5. Click **OK** to close the dialog.
6. Click **Refresh View** to save your changes to the view settings.
7. Refresh the Accolade page to display the new global link within its corresponding menu.

To modify or delete a global link to a planning view:

Note: Users with the Process Designer role can modify or delete a global link to a planning view.

1. From the **System** menu, select **Page Design > Global Links** to display a list of all global links.
2. To modify a global link, click the name of the link you want to edit, make updates as necessary, and click **Apply**.
3. To delete a global link, click  next to the global link.

Filtering Views to a Specific Project

Use planning views to provide project managers visibility into projects that are related, their timelines, and their dependencies. For example, providing visibility using a planning view can provide insight into the impacts on other projects if a project's schedule were to slip.

- **To filter planning views displayed in a page layout** - Create the global link to the view as described above and add the global link to a pod with a page layout. Select the **Filter to Project** option within the pod's details.

When the layout displays within a project, the view is filtered to the level of that project.


- **To filter planning views accessed from a menu** - Create the global link to the view as described above. In the **Link** field within the global link description, append the project ID (?projectId=<id number>), to the end of the link.

For example: /Planning/PlanningBoard/Index/13?projectId=307

When the global link is accessed from the assigned menu, the view is filtered to the level of the project matching the ID.


Filtering views does not apply to composite views.


Saving Planning Views

Save Grid and Gantt views for future use. Planners who also have the Process Designer role can save a view as a public view that other users can access. Planners without the Process Designer role can only save their views for their own use. Each view displays in the **Saved Views** list. Those that are public display with an icon specific to the view type, for example, , to indicate it is a view available to multiple users.

The Canvas is saved automatically as you add and change elements, and is a place where Planners can view all elements at each level of the planning hierarchy.

To save a planning view:


1. From the **Planning** menu, select **Planning Board**.
2. Create a view or display a saved view.
3. Click  next to the view name to open the Edit Gantt Settings dialog.
4. Click **Show More** in the lower left corner of the dialog to view the additional settings for the view.
5. In the **Sharing, Viewing and Ownership** section, complete the following information:

Field	Description
Default View for Users	<p>Click  to select users who open this view immediately when they open the Planning Board.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none">• 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. <p>A user can have only one default view. If a user currently has a default view, its name displays after the user's name.</p>
Make public	<p>Select this check box to allow all Planners to see this view in the Saved Views list. A view must have a defined owner in order to be made public.</p>

Field	Description
	💡 Only Planning View Designers can create public views.

6. Click **Done** to apply the changes and refresh an existing view.
7. Click **Save** in the top right corner of the view to save your changes to the view.

Notes:

- To delete a saved view that you created, in the **Saved Views** list, click  next to the name of the view. Process Designers can delete any public view. Deleting a view deletes only the view, not the elements within the view.

Exercises - Saving Views as Images and Creating Links



Try out what you have learned!

- If you still have the Gantt view you created in the previous set of exercises, save the view. If not, create a Gantt and save it.
 - Display the Gantt in presentation mode.
 - Download the Gantt as an image and paste it into a presentation file.
 - If you are also a Process Designer, add the Gantt as a global link to the Planning menu.
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