Sopheon Accolade®

Process and Project Management - Accessing Projects
Training Guide

Version: 15.3

About Sopheon Accolade®

Document Name:	Process and Project Management - Accessing Projects Training Guide
Document Version:	1
Software Version:	Sopheon Accolade 15.3
Document Date:	May 2023

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Contents

About the Accolade Education Program

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

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

- Reduced cycle time by displaying clear structure and visibility.

- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.

- Assured positive user experience through properly developed product requirements.

- Improved communication by automating collaboration between multifunctional team members.

- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.

- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.

- Managed business risk. Break resource commitments into increments or stages.

- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

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

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

Prerequisites for Using this Module

The contents of this training module 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
- Any*

Terms and Concepts
- Accolade Navigation
- Projects

Related Training Modules
- Getting Started with Accolade
- Understanding Projects

*Roles such as Administrator, Process Designer, and Reference Table Manager do not apply.

Accessing Projects and Documents

Information in Accolade is secured through its visibility access, which controls what each user can and cannot access throughout the application. At a high level, your user role and user assignments within a project determines your project and document access. Whether a document is published or unpublished determines your accessibility to the document through Search.

> **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.

Projects Access

Project access is determined by whether you are a member of a project team (including current and delegated action owners in workflows) and whether you are assigned the appropriate access groups, security profiles, and security lists that further restrict the information you can and cannot see within Accolade. These are defined at the system level and are specific to your company and how your company has set up access security. To view your access definitions, click your user name in the Accolade title bar to display your user profile.

Some users have edit access to a project, and some have view-only access to a project. Your role on the project team determines what types of information you can view or edit within the project and whether you have upload and download rights to documents within the project.

Document Access

Your assignments within a project and whether a document is published determines your access to a document and whether you have permission to upload, download, or edit a document. Only published documents return in searches. Publishing allows document owners to choose when to make a document's contents available to Accolade users who are not part of the project team.

Document Type	Access Notes
Deliverable and Activity Documents	For most deliverables and activities, users who have access to a deliverable or activity within a project also have access to view the latest version of the document attached to the project. If a deliverable or activity document is published, all users with access to Quick Search, Advanced Search, or the project through the correct access group assignments, can view the latest published version of the document.

Document Type	Access Notes
	Depending on how the deliverable or activity is configured in the model, access may also be restricted by user role. For deliverables and activities set up with these restrictions, users must also have the user roles assigned to the deliverable and activity within the model to view and download templates, the latest version within the project, and to published versions through Quick Search and Advanced Search. Without the assigned user role, users cannot access any content or details for the deliverable or activity. Deliverable documents are available on the **Stages** page within a project. 💡 To access deliverables in projects that you are assigned the owner to, or are assigned as a Document Reviewer, use the **My Work** page available in the **Workspace > My Workspace** menu. Users who can view deliverable and activity documents typically include the following: • Executive (published only) • Gate Manager assigned as the gate owner (published only) • Document Reviewers • Document Owners • Other members of the project team, including the project manager • Idea Manager • Process Manager Users who can add a version of a gate document within a project include the following: • Document Owner • Idea Manager • Process Manager • Project Manager A Process Manager with Manage Process rights or the assigned project manager can publish or unpublish an existing version, but cannot add and publish a new version unless the document has no owner.
Gate Documents	Users who have access to gate information within a project also have access to view the latest version of a document attached to a gate. If a gate document is published, all users with access to Quick Search, Advanced Search, or the project can view the latest published version of a gate document. Gate documents are available on the **Gate** page within a project. 💡 To access gate documents in gates in which you are the assigned gate owner, use the Work pod on the **Upcoming Gates** page available in the **Workspace > My Workspace** menu. You can also view a list of upcoming gate meetings from the **Upcoming Gates**

Document Type	Access Notes
	💡 page. Users who can view gate documents typically include the following: • Executive • Gate Manager assigned as the gate's owner • Members of the project team, including the assigned project manager • Idea Manager • Process Manager • Resource Demand Planner Users who can add a version of a gate document within a project include the following: • The assigned gate owner • Idea Manager • Process Manager • Project Manager A Process Manager or the Project Manager can publish or unpublish an existing version, but cannot add and publish a new version unless the document has no owner.
Related Documents	Related documents can be added to the project, or to a deliverable or activity within the project. Users who have access to information within a project also have access to view the latest version of a related document attached to the project. Users who have access to a deliverable or activity also have access to the related documents attached to the deliverable or activity. Related documents attached to the project are available on the **Related Docs** page within a project. Users who can view related documents within a project typically include the following: • Executive • Gate Manager assigned as the gate owner • Members of the project team (team members, project manager). • Idea Manager (for idea projects) with Manage Process rights • Process Manager with Manage Process rights • Resource Demand Planner If a related document is published, all users with access to Quick Search, Advanced Search, or the project can view the latest published version of the document, if they have access to the project through their access group associations.

Document Type	Access Notes
	For deliverables and activities set up with user role restrictions, users must also have the user roles assigned to the deliverable and activity within the model to view and download related documents that are attached to the restricted deliverable or activity. Related documents attached to a deliverable or activity that is restricted to specific user roles is not available on the **Related Docs** page in the project, unless it is also associated with a non-restricted deliverable or activity.
	Members of the project team (team members and project managers) can add and edit details for related documents. The assigned document owner, Process Manager with Manage Process rights, and members of the project team including the assigned project manager can add related documents to a deliverable or activity. Workflow action owners can add related documents to the deliverable or activity associated with their workflow action.
	Restricted Team Members can add, view, and edit only the related documents associated with their assignments.

Document Ownership and Editing Rights

Your role on the project team and whether you own a deliverable or activity determines if you can upload and publish document versions, and whether you have rights to modify details such as the status, document dates, and the document owner.

Document Ownership

Ownership of a gate document, deliverable, or activity determines whether you can upload and publish new document versions. Ownership can be either *explicit* (an owner is specifically assigned) or *implicit* (ownership is inherited when an explicit owner is not assigned).

You have explicit ownership of a document under the following circumstances:

- **You are assigned as the document owner** - On a project team, you are assigned automatically to deliverables and activities that have been associated in the model or on the project team with your job function on the team. For example, as a Chemist or a member of Quality Assurance. The first team member on a team that is assigned to the function associated with the document becomes the owner of any document with that function.

  A Process Manager with Manage Process rights or the assigned project manager can also assign you as the owner of a single deliverable or activity within the project, giving you explicit rights.

  These ownership rules are also true for gate owners, and any associated gate documents.

- **The document owner assigns you to an activity on their deliverable** - Document owners can assign themselves, the project manager, or other team members as the owner of an activity on a deliverable that they own.

- **You assign yourself as document owner** - If shared ownership (collaborative deliverables) is enabled, you can assign yourself as the owner of a currently unowned deliverable or activity that has been flagged to allow shared ownership.

  Select your own name next to a deliverable or activity that has been marked as collaborative and that currently displays **[Available]** in the **Owner** field.

If a gate, deliverable, or activity does not have an explicit, assigned owner, it always has an *implicit* owner to ensure there is always an owner assigned, and so the project manager does not have to assign themselves as an owner to change an unowned document. Implicit ownership applies when a user is not specifically assigned as the owner and is determined as follows:

- If an activity has no owner, the owner assigned the deliverable owns the activity.

- If a deliverable has no assigned owner, the project manager owns the deliverable and can add new versions of the deliverable to the project.

- If a gate has no assigned owner, the project manager owns the deliverable and can add new versions of gate documents within the gate and can set gate meetings.

- If a project has no assigned project manager, a Process Manager (or Idea Manager for Idea projects) with Manage Process rights within the project's access group, has project manager rights to the project. Therefore, the Process Manager owns unassigned gates, deliverables, and activities. As soon as a project has an assigned project manager, the Process Manager no longer has implicit rights.

Document Editing Rights

Your user role and assignments within a project determine your ability to edit certain deliverable, activity, and related document details. Assigned document owners, assigned project managers, and Process Managers (with Manage Process rights) have the ability to edit document details with or without ownership to the document. Other team members, such as workflow action owners, can also have limited edit rights, such as updating status notes and dates when a workflow is in progress and currently in the step in which they are taking action. However, team members with no association to a deliverable or activity do not have the ability to edit details, unless the deliverable is set for collaboration.

For example, the assigned document owner, assigned project managers, and Process Managers (with Manage Process rights) can update the status, status notes, dates, function, and owner of deliverable or activity. If an owner is assigned to a document, the project manager and Process Managers can no longer upload versions of the document because they have lost their implicit ownership rights. However, they can still update details such as dates.

> **Notes:**
> - The **Allow Team Members to Share Assignments** system parameter enables and disables collaborative deliverables.
> - The **Allow Document Owners to Set Start Date**, **Allow Document Owners to Set Deadline**, and **Allow Document Owners to Set Function** system parameters also determine whether assigned Document Owners can update those respective details in the documents that they own.

Searching for Projects and Documents

Search for projects and documents you have access to using Quick Search (available from the Accolade title bar) including words and phrases of metric values. Use Advanced Search to perform a more refined search.

You can enter words, phrases, partial words and phrases or operators to run more complex searches. Search is not case sensitive. Searching for **Project One** provides the same results as **project one**.

You can find projects by searching for a metric value. Enter the contents of a metric into Quick Search and any project containing that value is returned in the results.

The Accolade search engine is a Full Text Search, and searches for text contained in text files, HTML files, Microsoft Office 2003 and earlier files, and text in online forms. Search requires third-party IFilters to search text contained in Microsoft Office 2007 and later documents, PDFs, email files, Microsoft

Project files, and others. These IFilters are part of the installation process. See the *Accolade Installation Guide* or contact Sopheon Customer Support for more information.

> **Important!** Images do not contain text so you cannot use search to find images attached to projects. If IFilters for PDFs are installed, Accolade search can only search text within PDFs, not images. If a document that contains text is scanned and saved as a PDF, the text is not searchable because scanning creates an image of the document.

Quick Search

Quick search searches for both projects and published documents matching your search expression to project names, project IDs, project description, project manager's name, words and phrases of metric values in document titles and content. The search returns results for all projects in which you are a member of the project team or have access to through your access group assignments. Quick Search only displays for users with roles with project access.

- Document Reviewer
- Executive
- Gate Manager
- Idea Manager
- Process Manager
- Resource Planner
- Search Only
- Project Team Leader
- Project Team Member

To search for a project or document:

1. Enter search text in the **Quick Search** field in the far right of the Accolade title bar and press **Enter**.

   💡 To find all the projects in which you are a team member, all documents which you own, and all published documents to which you have access, leave the search field blank and press **Enter**.

   Search results are shown in a panel that slides in from the right side. Do any of the following to work with the Quick Search results:

   - **To dock the panel** - Click 📌 to dock the panel so it remains open.

   - **Access Project Manager or document owner details** - Click ▶ next to the project or document
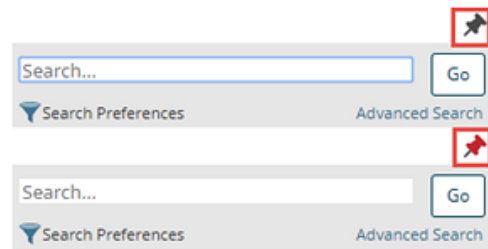
in the search results to expand the details. From here, click to contact the Project Manager or document owner by email or via chat.

- **Display the project or document** - Click the name of the project or document in the search results.

To set Quick Search preferences:

1. With the Quick Search window open, click in the search results window.

2. Select the appropriate options to do the following:

    - **Search only for projects** - Clear the **Show documents** check box.

    - **Search for closed projects** - Select the **Include closed projects in project search** check box.

    - **Search for documents in closed projects** - Select the **Include closed projects in document search** check box. When the check box is cleared, the search results include documents in open and closed projects.

    - **Limit or increase the number or returned results** - In the **Show a Maximum of...** fields, enter the maximum number or projects and documents to include in the returned search results.

    - **Search within one or more project classes** - In the **Select Classes in Project Search** field, click a class name, or use **CTRL** + click to select several classes.

3. Click **Save**.

Advanced Search

Advanced Search enables you to filter the search to specify the part of the total results you want to see. Using Advanced Search, you can search for project or published documents at one time.

💡 Select to print the list of projects or documents found using Advanced Search.

To use advanced search to find projects and documents:

1. From the **Workspace** menu, select **Find** and select whether to search for project or documents.

    💡 You can also access Advanced Search directly from the Quick Search results window. Click **Advanced Search** and select the appropriate tab.

2. Do one of the following:

    - **To find all projects or documents to which you have access** - Leave all the fields in the **Search For** section blank and click **Search**.

    - **To search for one or more specific projects or documents** - Enter filtering information in one or more fields in the **Search For** section. When you enter filters, Search finds projects for which ALL of the filters are true meaning the filters are combined logically by AND, not by OR.

3. Click **Search**.

Exercises - Filter and Find Using Search

Try out what you have learned!

- Dock the search panel.

- Alter Quick Search preferences to search only for projects within a created class.

- Use the Advanced Search to filter search preferences for projects and documents to which you have access.

Note that Search finds projects for which ALL filters are true.

Viewing Document Details and Versions

Each document contains additional details, and can contain a template and one or more published or non-published versions. Where you access a document depends on the document type, and your project accessibility. Depending on your system's configuration, Gate documents are available in the project **Gates** page, deliverable and activity documents in the **Stages** page, and project related documents in the **Related Docs** page and from the **My Work** page.

- Document Details

- Document Templates

- Document Versions

Published versions of each document type are also available through Quick Search and Advanced Search. To add or publish a version of a document, see the Adding and Publishing Document Versions topic in the online Help.

Depending on how the deliverable or activity is configured in the model, access may also be restricted by user role. For deliverables and activities set up with these restrictions, users must also have the user roles assigned to the deliverable and activity within the model to view and download templates, the latest version within the project, and to published versions through Quick Search and Advanced Search. Without the assigned user role, users cannot access any content or details for the deliverable or activity.

Document Details

Each document has a set of details that includes the document name, a description, the latest version and latest published versions available, access to the document's template, and other information.

Deliverable and activity details also include information about the following:

- Workflows assigned.

- Document dates.

- Stage and gate information.

- Custom information, or extended fields, assigned to display in deliverables or activities.

- Filter options for matrices with filters defined. Process Managers (and Idea Managers for Idea projects) with Manage Process rights and the assigned Project Manager can change these options for deliverables and activities. Deliverable owners can change these options for activities for their deliverable.
- Access to set a document as collaborative.

The availability of the information above within the Deliverable/Activity Details is dependent on your Accolade configuration.

All users who have access to a project can view the details of the published version of a deliverable or activity within the project. Members of the project team have access to the unpublished versions.

To access document details:

1. Display the project that contains the document.

   💡 You can search for a published document using Quick Search or Advanced Search, or access a document's details from the **My Work** page available on the **Workspace** menu.

2. If you displayed a project, select the **Gates** ◆, **Stages** ☑, or **Related Docs** 📎 page, depending on the type of document.

3. Click the document name to display the document's details.

   For deliverables and activities, details are displayed in either the Summary pane on the left side of the dialog or by clicking **More Details** in the dialog's Contents tree.

   If accessing gate documents from a project-specific page, navigate to the pod area containing the gate documents and click the document name to display the details.

   EXAMPLE Example

Document Templates

Gate, deliverable, and activity documents can have a template, which is the starting point for creating the document. Process Designers assign templates to gate, deliverable, and activity documents in the Process Model. Document owners can download templates when they start to work on their process documents. Templates often include the initial formatting for a document, and Accolade field codes that pull specific information from Accolade, such as metric values or project details such as the project name and description.

Document templates *do not* apply to related documents on a project, or related documents attached directly to a deliverable or activity.

To access document templates:

1. Display the project that contains the document.

   💡 You can search for a published document using Quick Search or Advanced Search, or access a document's details from the **My Work** page available on the **Workspace** menu.

2. If you displayed a project, select the **Gates** ◆ or **Stages** ☑ page, depending on the type of document.

3. Click the document name to display the document's additional details.

4. Do one of the following:

   - **For deliverable and activity document templates** - At the top of the Contents tree, expand the **Versions** section and click **Template**.
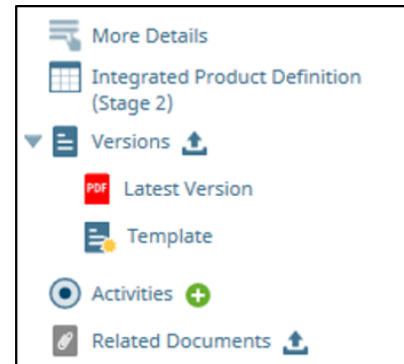
   💡 To download a template of a deliverable or activity directly from the **Stages** ☑ page without accessing the document details, click the ▤ (or similar icon) next to *Template* to download it. Anyone with access to the project can download the template from the **Stages** ☑ page.

   - **For gate document templates** - Click the associated file type icon with the file name.

Document Versions

Creating a version creates a copy of the document as it was at a particular point in its development. A version can be *published*, which makes it accessible through Quick Search and Advanced Search to Accolade users outside the project team who have access to the project. Non-published versions are accessible only to project team members and Process Managers and Idea Managers with Manage Process rights.

To access published document versions:

1. Display the project that contains the document.

   💡 You can search for a published document using Quick Search or Advanced Search, or access a document's details from the **My Work** page available on the **Workspace** menu.

2. Select the **Gates** ◆, **Stages** ☑, or **Related Docs** 📎 page, depending on the type of document and review the details.

💡 To narrow the list of related documents and images on the **Related Docs** 📎 page, click **Filters** on the right side of the page and select to filter by category, stage, uploaded date, or by the user who uploaded the document. Click **Apply Filters**.

3. Click the document name to display the document's additional details.

4. Do one of the following:

   - **For deliverable and activity documents** - At the top of the Contents tree expand the **Versions** section and click **Published Version**. For documents linked to a previous stage, click **Linked Version**.

   - **For gate documents** - In the **Versions of this Gate Document** section, click the icon next to the version that indicates **Yes** in the **Published** field.

     If accessing a gate document from a project-specific page, click the icon next to the published version listed in the gate document details.

Versions of this Deliverable (7)

Published	Version	Uploaded On
☑	⬇	Nov 19, 2014
☐	⬇	Nov 19, 2014
☐	⬇	Oct 03, 2013
☐	⬇	Sep 27, 2013

EXAMPLE Example

Wind ▶ Gate 1 - Go to Build Business Case ▶ Gate Contract   ✉ ⑦ ⤢ ✕

Gate Contract

Name
Gate Contract   ⬆ Add New

Template
🗎 Gate Contract   ✏ Add Link

Description
The Gate Contract is prepared in a gate meeting or immediately afterwards and contains the decisions, rationale, and commitments made by the gatekeepers and the project team for the next stage. The gate contract is typically owned by the Gate Manager.

Gate Document Version Details (0)

Published	Filename	Version	Uploaded On	Uploaded By	Author	Comments
There are no records.						

[Apply] [Reset]

   - **For project related documents** - Click the file type icon in the row indicated as published.

   💡 To download a version of a deliverable or activity directly from the **Stages** 📋 page without accessing the document details, click the 🗎 (or similar icon) to download the selected version. To download a published version directly from Quick Search or Advanced Search, click the file type icon next to the document name in the search results.

   For documents that are linked to a previous stage, click the 🗎 (or similar icon) to download the latest version from the previous stage.

To access non-published document versions:

1. Display the project that contains the document.

2. Select the **Gates** ◆, **Stages** ☑, or **Related Docs** 📎 page, depending on the type of document and review the details.

   💡 To narrow the list of related documents and images on the **Related Docs** 📎 page, click **Filters** on the right side of the page and select to filter by category, stage, uploaded date, or by the user who uploaded the document. Click **Apply Filters**.

3. Click the document name to display the document's additional details.

4. Do one of the following:

   • **For deliverable and activity documents** - To download the latest version, at the top of the Contents tree, expand the **Versions** section and click **Latest Version**.

     For documents that are linked to a previous stage, click **Linked Version** to access the latest version of the document from the previous stage.

     To access all versions of the document (latest, published, and non-published), click **Versions** at the top of the Contents tree. In the **Versions** section, click the icon next to the version to download. If you are not a project team member, you can see the versions in the table; however, you only have access to download the published version.

     💡 Members of the project team can click 📄 or 📄✨ (or similar icons) next to the deliverable or activity on the **Stages** ☑ page to view and download the latest version of published or unpublished documents.

   • **For gate documents** - Click the icon next to the version in the **Versions of this Gate Document** section. All non-published versions indicate **No** in the **Published** field. Click the icon next to the version to download and view it. Click the version name in the **Version** field to access the version's details.

   〰️ EXAMPLE 〰️ Example

- **For project related documents** - Click the document or image name to access the details and non-published versions. Click the name of version name to download it.

> **Notes:**
>
> - To download the latest version of multiple documents from the **Stages** ☑ page, select the check boxes to the right end of the rows of the documents to download and click **Download Selected Documents**. The documents are bundled into a .zip file and saved to your selected location.

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