Sopheon Accolade®

Process and Project Management - Understanding Projects Training Guide

Version: 15.3

About Sopheon Accolade®

Document Name:	Process and Project Management - Understanding 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

Related Training Modules

- Getting Started with Accolade
- Accessing Projects

What is a Project?

A project in Accolade can be any number of things and can serve your company's needs in a variety of ways. It can be a new product, part of a new product, a repository of documents, a campaign to gather ideas, or a way to collaborate on processes, products, ideas, and best practices.

Understanding Project Components

A project in Accolade is where information about your company's work is stored and managed. Different projects may display different information, based on the project type, and the process model the project follows. Projects contain all the deliverables, activities, and stage and gate information to complete the project following the company's defined processes and required information. A variety of users, including Project Managers, Process Managers, and Project Team Members have access to various project components to complete their work on the project, while others have access to view the progress of project.

Project information is contained in a variety of places located in a central location for each project. Depending on your role on the project, you may have access to view or edit the project information in the project pages.

The Project Header includes key project information such as the project name, model, current stage, and the assigned project manager.

- The Process Graphic provides a graphical representation with links to stages and gates within the project.

- The Navigation pane includes options to access different pages within the project, such as the current stage and gate, project teams, reports, and related documents.

  - The options available in the navigation pane may differ from project to project.

  - Expand the Navigation pane if you need text to help identify the options.

- The Content pane displays the project information associated with the project as editable or read-only, depending on your user role and your assignments within the projects.
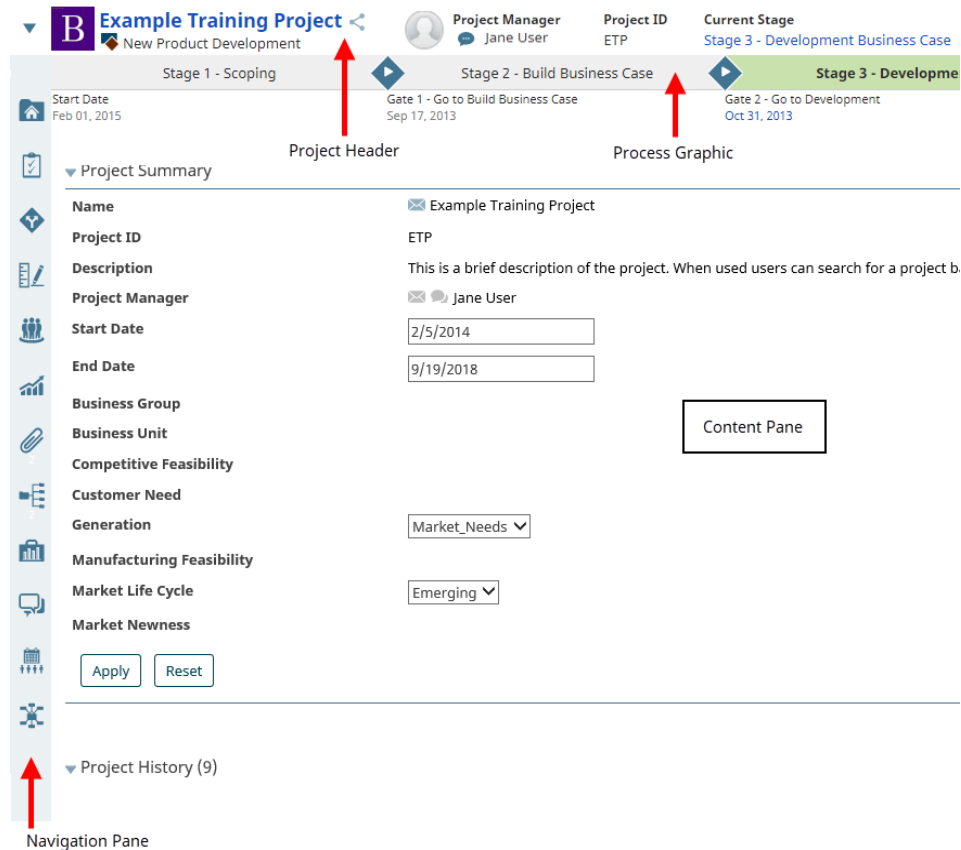
Stages and Gates

Each project is created using a process model that represents the structure that the process follows to completion. Models ensure that similar projects follow the same process from start to completion. The processes are as unique as your company and the products and services you offer. A model can a series of alternating periods of gathering and developing a product or service (stage) or check points to decide whether to continue the product development (gate). Each stage and gate contains different components relative to that portion of the product development.

When you access projects in Accolade, the project's process flow is represented in graphic form at the top of most of the project pages. From the graphic, you can see where the project is in its development life cycle, and access the contents of the stages and gates.
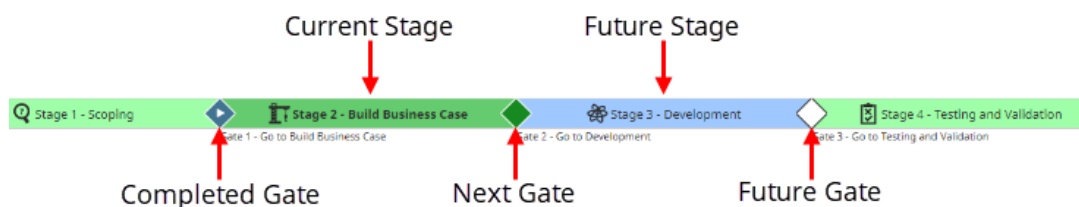
Each stage contains one or more deliverables within it that need to be completed prior to the next stage.
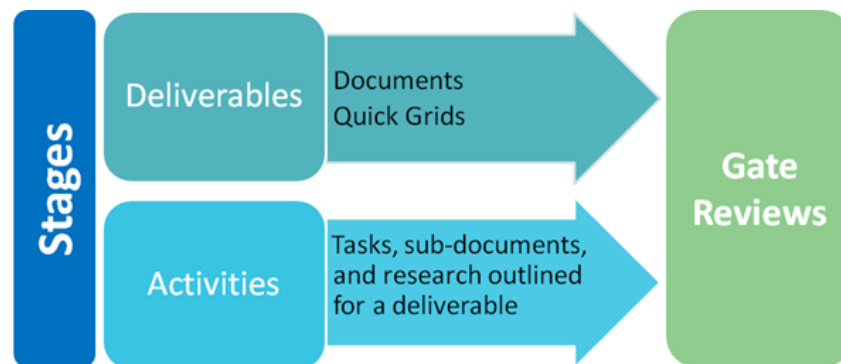
Deliverables and Activities

As members of the project team, you are assigned to complete deliverables and activities within a stage in the project.

- **Deliverable** - A deliverable is a document or other item that is produced for a gate meeting. Its purpose is to help gatekeepers decide whether to continue or discontinue a project. Deliverables can be physical items such as a prototype; however, they are represented in Accolade as documents or as quick grids (or a combination) where document owners can enter information. In addition, a deliverable can have additional reference information attached to it in the form of related documents.

- **Activity** - An activity is anything that helps to complete, or is part of, a deliverable. For example, the completion of a document that contains research for a deliverable, a sub-document to the deliverable itself that is presented at a gate meeting, or one or a series of tasks that support the completion of the deliverable.

Deliverables and activities can be any of the following types, or a combination:

- File documents, such as document, spreadsheet, or presentation files.
- Online forms that are completed directly within Accolade.
- Details in the form of quick grids for updating metrics (data gathering points) assigned to the project.
- External documents or web pages.

The information you provide in your deliverables and activities is presented at gate meetings where executives make decisions to continue work on a project. In addition, the information you enter can be contained on reports and dashboards regarding the health of a project and the overall health of innovation within your company.

Project Teams

With the Project Team Member user role, you are likely a member of one or more project teams. Your inclusion on a team indicates that you are available to complete work for that project. A project team typically consists of the following:

- **Project Manager/Team Leader** - This is the person who likely assigns you work on the project and is managing the project through its stages and gates.

- **Project Team Members** - These are the people who are assigned to complete the content that is part of stage or gate.

- **Gatekeepers** - Gatekeepers are the executives that made decisions about whether a project can move forward to the next stage.

Other Project Components

Projects contain other project components, such as documents related to the project that are not considered deliverables or activities within a stage. All project information is accessible through the project navigation pane available on left side of the project pages.

Settings in the model determine which of the project pages are available, and your role on the project team determines what you can do within the project. We'll talk about each of these components as it pertains to your user role.

Creating Projects

Process Managers with Add Project rights can create projects in Accolade.

Projects are created in the following ways:

- Automatically when users submit ideas (requires Idea Submission).
- Automatically when planning elements are created (requires Accolade Innovation Planning).
- By import using a set of reference table pairs. Use this method to create multiple projects at once.
- By migrating projects between models.
- Manually using the following process.

   💡 Enable the **Enable Auto Search on Project Creation** option in your user profile to enable an automatic search for projects and documents with the same or similar names or descriptions when creating new projects. Use this feature to help discover if like-projects exist, in order to prevent duplicating efforts when creating projects.

To manually create a new project in Accolade:

1. Click **New Project** in the Accolade title bar.
2. Select the class and the model that includes the appropriate process for the project.

   For example, if a project is in its very early discovery stages, select a model that includes a Scoping or Discovery stage as stage 1 in the process. If the project is low risk, or a small internal initiative, consider selecting a more condensed model that combines stages for development and testing efforts.

3. *(Optional)* If your process model is set up to **Allow Mid-Process Project Start for Creation**, select the starting point for the project.

> **Note:** This field is only available if the model is set to allow a mid-process start, and does not apply to non-gated projects.

If the project should start at the beginning of the model, select the first stage or gate. If a project starts in a subsequent stage, deliverables or activities may be hidden if conditional rules have been applied to the process model.

4. Complete the following information to identify and describe the project:

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 project. Provide a name that clearly indicates the project's purpose. Depending on your system's configuration, Process Managers and the assigned Project Manager can change the name later through the **Project Home** 🏠 page. **Note:** The process model configuration determines if you can enter a project name when creating a project. The configuration may be defined to generate the name based on a metric value.
Project ID	Enter an ID that displays on the project header and in reports. This is also referred to as the project code. The ID is intended for reporting and to help identify and locate a project, and can include any characters or symbols, including spaces and characters from non-English alphabets. **Note:** The process model configuration, or a system parameter, determines if you can enter a project ID when creating a project. The configuration may be defined to generate the ID based on a metric value or sequentially as projects are created.
Description	*(Optional)* Enter a description of the purpose or nature of project. This description helps other users identify the project throughout Accolade.

5. Complete the security options to define the project's security access.

Field	Description
Access Group	Select the group that determines which users have access to this project.

Field	Description
	Your management rights allow you to create projects in access groups that you have Add Project rights to, indicated with an asterisk (*) next to the name, and that are also set in the process model. If the process model contains access groups restrictions, unavailable options are disabled in the list, even if you have Add Project rights to the group.
	Depending on the model configuration, it is possible that after the project is created, the project is assigned to a different access group based on a metric value.
Security Lists	If security lists are in use, select the check boxes in every list to specify which users have access to this project based on security list settings.

6. *(Optional)* Complete the additional project details for initial project creation.

Field	Description
Project Manager	Click 🔍 to select the leader for this project.
	To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.
	• Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
	• Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.

Field	Description
	• Clicking the **Show advanced filters** check box displays or hides the additional filter options. • Clicking **Clear** removes the current user assignment and displays **[None]** to indicate that no user is assigned. • If **Project Manager required on create** is set at the model level, a project manager must be selected when creating the project. • If a default manager is set at the model level, you cannot select a manager when creating the project. However, you can change who is assigned to the project after the project is created. • If a selection is not required at initiation and you create a project without designating a Project Manager, one can be selected later in the project's header. **Note:** If the **Enforce Project Security** option is set for the model, only Project Managers who have access to the project through security definitions are available to assign as the manager for the project.
Project Manager can manage team	Select the **Project Manager can manage team** option if the selected user has the ability to assign, remove, and replace members of the project team. • If the selected user has the Project Manager user role but does not have Process Manager or Idea Manager with Manage Team rights, the selection made here overrides the Manage Team rights for that user for this project. • If the selected user is a Process Manager or Idea Manager with Manage Team rights for the project's access group, this option is selected and disabled. • If the project manager should have all other project management abilities *except* for managing teams, leave the option cleared.
Currency	Select the currency in which financial data is entered and reported on for this project. **Note:** Depending on the model, this option may not be available. If currency features have been enabled, the project's currency is initially set to the corporate currency.
Start Date and **End Date**	Enter the project's default start and end dates.

Field	Description
Gate Names and **Dates**	Enter names and dates for gates within the project. Gate names may be hidden or may either allow or require you to select gate dates, depending on the model.
Metrics	Enter the appropriate metric values for the project. Depending on the model, some metric entries may be required to create the project.
Additional Text Fields	If included for a project, enter any additional information in the additional fields provided.

7. *(Optional)* Click ⬆ and select one or more files to attach as related documents to the project.

   If you attach one or more image files, the last image file loaded is used as the project thumbnail image. The thumbnail image can be changed through the project's **Related Docs** after the project is created.

8. Click **Create** to create the project.

   The project displays with the initial page as defined in the model.

Exercises - Create a Project

Try out what you have learned!

- Determine the purpose of your project.

  For example, you may choose to have a project represent a product for market launch.

- Create a test project you can use throughout your learnings.

- Upload a thumbnail image as a related document and make yourself the Project Manager.

Sopheon Corporation

6870 West 52nd Avenue, Suite 215

Arvada, CO 80002