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# Sopheon Accolade<sup>®</sup>

## Executives - Making Project Decisions 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

- Executive

### Terms and Concepts

- Accolade terminology

### Related Training Modules

- Getting Started with Accolade
- Understanding Projects

# Manage and Vote on Gates Overview

If a project uses a gated model, the project contains one or more gates, which are points in the process where decisions are made about whether to continue to the next phase of a project. The project team assembles the deliverables from the stage leading up to the gate and those who are responsible for making the decision use the information to decide whether to continue the project, put the project on hold, gather more information prior to making a decision, or to cancel work on the project.

## Gate Participants

Gates and the events leading up to a gate meeting include the following project team members:

- **Gate Owner** - Gate owners schedule gate meetings including the appropriate gatekeepers, and ensure that all the deliverables and gate documents are ready prior to the gate meeting. For gates they own, gate owners can modify gate details, modify gate documents, change gatekeepers, and enter gate decisions.

The Process Manager with Manage Process rights assigns the gate owners for each gate at the project level. The model can also contain a default gate owner. A gate owner can be any of the following:

- A user assigned the Gate Manager user role.
- A user assigned the Process Manager user role with Manage Process rights at the access group level.
- **Gatekeeper** - During gate meetings, gatekeepers make decisions for their functional area about whether the project is ready to move on to the next stage. The functional areas that apply to each gate are assigned in the process model. The process model can also contain users assigned to each function that populate in each project that uses the model.

The gate owner for a gate can change the gatekeepers for gates that they own or choose to not include a gatekeeper in a particular gate meeting. Gatekeepers must be assigned the Executive user role.

## Gate Decisions

Gate decisions can be captured in the following ways:

- **Manually with no voting options** - The gate owner enters the gate decision to advance the project to the next gate.
- **With gatekeeper voting** - Gatekeepers enter an approval or rejection decision for a pending gate decision. Within the process model, gatekeeper voting can be set to skip a gatekeeper, for example, if they are absent or are not required for a particular project, and set to move a project to the next stage if a unanimous Go or Conditional Go decision is made.

- **Automatically using metric conditions** - Gate decisions can be set automatically based on metric conditions defined in the process model for a gate, or metrics conditions defined in an automated step in a workflow that is part of the stage before a gate.

## Reviewing Upcoming Gates and Gate Details


If you are assigned to one or more gates, review details about upcoming gate meetings to ensure projects are ready for their gates, and that you are prepared for gate meetings. To help manage and prepare for gate meetings, Accolade offers several locations to view gate materials. How you access gate information can depend on your assigned user role and your gate assignments.

- **Upcoming Gates** - Users assigned the Executive, Process Manager, or Gate Manager user roles can access a list of gates that they own using the **Upcoming Gates** page available from the **Workspace** menu. This page uses the Work pod to display gate information. Work pods located in other areas of Accolade can also be configured to display gates.
- **Gates page on projects** - Depending on your system's configuration, the project gates page may be a custom page layout where users can view gate details, enter gate meeting decisions, upload and edit documents relating to the meeting, and view gate-specific history. This information is displayed in pods and can be accessed by clicking the gate icon in the process graphic or page layout titled **Gates**.

Within each of these pages, you can find the following information and link to the project details, such as gate meeting notes, gate documents, and gatekeeper information directly from the page:

- Projects that have a scheduled gate meeting and the meeting's date.
- Projects that are ready for their next gate meeting, but the meeting has not been scheduled.



Click  on the **Upcoming Gates** page to filter and sort the gates that display and to change the order in which they display.

- Projects that may be in danger of not meeting their scheduled dates. Use the icon legend on the page to identify the project's current state of readiness for the next gate. On the **Upcoming Gates** page, hover your mouse over the icon for more information.

### Notes:

- All users with access to a project can view gate details, such as gate meeting location and time, gate documents, and gatekeeper information directly from the project pages. Click the gate icon in the process graphic within a project to display the gate's detail information.
- Click the name of the next gate on the **Upcoming Gates** page to open the **Gates** page of the project to display more information about the next gate.


## Voting on Gate Decisions

If gatekeeper voting is enabled for a gate within the model, gate owners set a pending decision for the gate that gatekeepers can then enter whether they approve or reject the gate decision.

If gatekeeper voting is not enabled, gate owners manually enter the gate meeting decision based on the discussions and decision within the gate meeting. Depending on your system's configuration, gatekeepers may vote from a project-specific page that includes the gatekeeper voting area or pod.

### To vote on a gate decision from a project-specific page:

**Note:** The procedure outlined below assumes use of the default system gates layout titled **Project Gates**. This page may vary across Accolade implementations and may be customized to your company's specific needs.

1. [Review your upcoming gates](#) and identify the project page that contains the gate voting area.  
This may be included on the active gate page. Click the gate icon in the process graphic to access the active gate or navigate to the **Project Gates** page.
2. Review the proposed gate decision in the top right of the Gatekeepers pod.
3. Enter text in the comment field as necessary. You can enter a comment without having to vote on the gate decision.
4. Click  next to your name and select to approve or reject the proposed decision. You can change your vote until the gate decision is set.
5. Click **Apply** to save your changes.



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