Sopheon Accolade®

Process Design - Deliverable and Activity Design
Training Guide

Version: 16.0

About Sopheon Accolade®

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Contents

About the Accolade Education Program

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

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

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

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

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

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

Accolade User Roles

- Process Designer

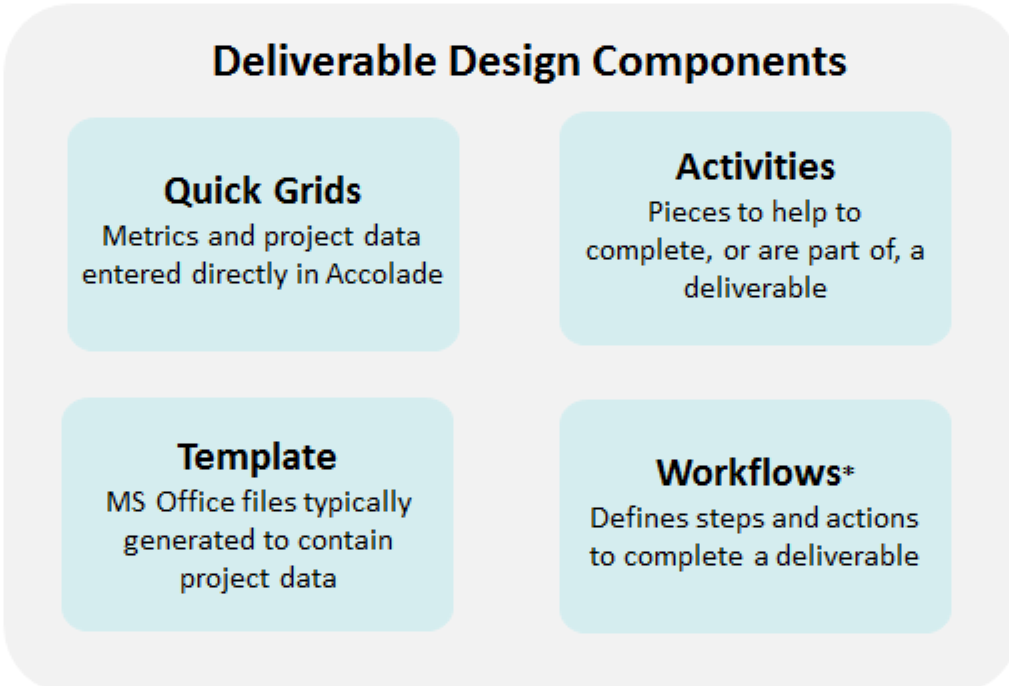
Terms and Concepts

- Metadata
- Metrics and Matrices
- Process Models

Related Training Modules

- Process Design Overview
- Metric and Matrix Design
- Process Model Design

What are Deliverables and Activities?



*Available with the optional Collaborative Workflow component.

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 kill a project. Deliverables can be physical items such as a prototype; however, they are represented in Accolade as documents. Example deliverables for a project could include:

- Proof of concept prototypes.
- Market and technical assessments.
- Regulatory assessments.
- Production supply plans.
- Market launch plans and schedules.
- Testing and validation plans

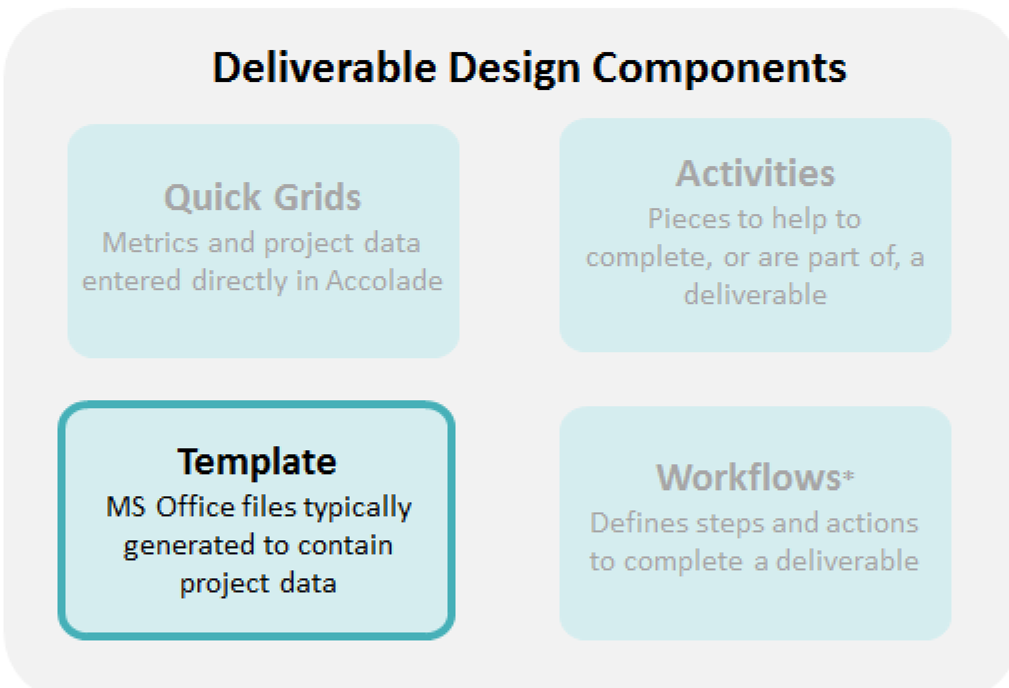
The starting point for a deliverable is designed and added to a process model. Each deliverable can contain the following:

- **Template** - Typically a Microsoft application file that is generated to contain information from the project. Your design includes determining the look and feel of the document, and what project data to include. Templates are added to the Template Library, and can be used across deliverables and process models. A deliverable can have only one template assigned.

- **Quick Grids** - A place for the assigned document owners to enter information for metrics and other project data. The same data entered in a quick grid can be populated in a downloaded template file that contains design elements that make the information suitable for review at a gate meeting. Enter quick grids for easy data entry for the information required in a deliverable.
- **Activities** - 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. Activities can contain the same components as a deliverable, so are not addressed separately in this training module.
- **Workflows** - Part of the optional Collaborative Workflow feature for Accolade, workflows define steps and actions to complete a deliverable or an activity, for example, for review and approval of the final version of a document. Designing and adding workflows is covered in the *Collaborative Workflow* training module.

Within a project, deliverables contain additional pieces such as status notes and related documents. Those pieces are not part of the initial deliverable design.

Templates Overview



In Accolade, templates are the starting point for creating process documents for deliverables and activities, Excel reports, Project schedules, and other documents. Using templates provides consistency across similar documents across all the projects within your organization. Templates can exist for the following:

- Deliverables and activities
- Gate documents
- Online forms
- Idea forms
- Microsoft Project plans)
- Display images (currently supported for page layouts)
- Any document that your company uses as a template outside of Accolade

Template Access

Anyone in your organization can create a document that you decide to use as a template. However, only Administrators and Process Designers with the Template Access user role can add templates to the Template Library, which is the repository for templates available within Accolade. Anyone with Template Access can view the templates that align with their access groups. Administrators and Process Designers that have Template Access have the ability to add, remove, edit, or view templates that they share access groups with and have edit rights in those access groups.

Other roles have no access to the Template Library; however, they can download template files when they start to work on their documents within a project.

Smart Templates

A "smart" template is an Excel, Word, or PowerPoint file that includes Accolade data in the document, pulled from the Accolade database each time the template (or document version) is downloaded. Rich text metrics do not display in Excel or Word smart templates but they do display in PowerPoint.

Smart templates allow users to:

- Include the most up-to-date metric and project metadata values from the Accolade database.
- Maintain project metrics in deliverables by uploading values from the document to the database (Word files with specific-metric types only and specific Excel documents).
- Include the most up-to-date values from reference tables.

Accolade data is added to the document using Accolade field codes, which map data in the Accolade database to a place within the document, or named ranges to add Accolade online reports and other tables to Excel. Smart documents only work for documents that are uploaded into Accolade. Data does not refresh if the document is created as a link to an external document.

> A document can be "smart" and not be added to Accolade as a template in the Template Library.

The following document types can include field codes to become "smart" documents or templates:

- **Excel** -.xlsx, .xlsm, .xltx, .xltm
- **Word** -.docx, .docm, .dotx, .dotm
- **PowerPoint**- .pptx, .pptm, .potx, .potm, .ppsx, .ppsm

Template Best Practices

Keep the following set of best practice recommendations in mind when creating templates:

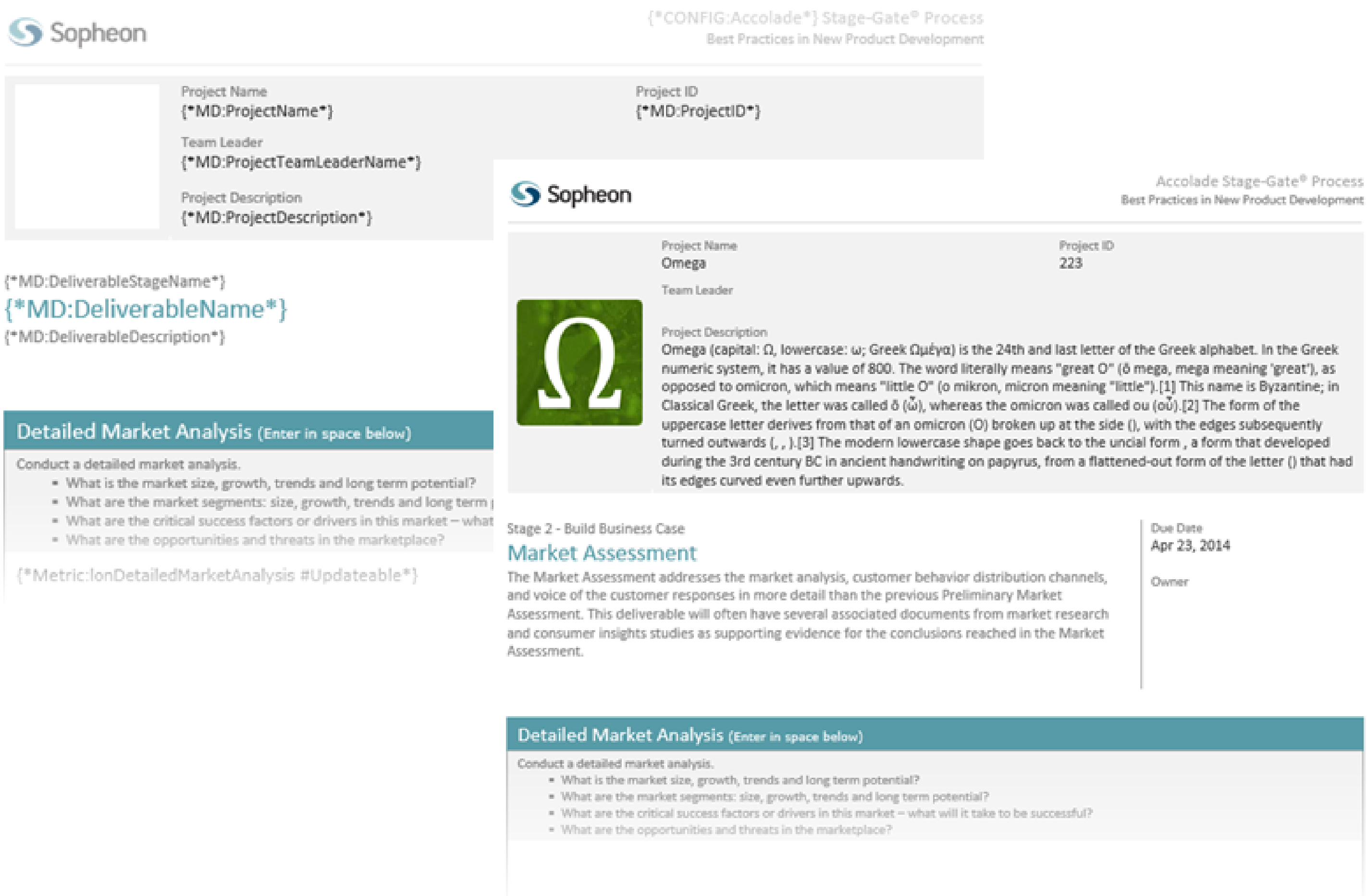
- **Use the Base Templates Provided from Sopheon** - Each Accolade release contains a group of base templates on the Base Templates Reference Page. Use these base templates as starting points for templates specific to your organization.
- **Use Descriptive and Unique Template Names** - Users need to be able to clearly distinguish the different template types and their uses. For example, Process Designers building models need to distinguish between templates used for files and those for online forms, and the difference between a Master Template such as the Excel Master template and other Excel templates available.
- **Use Categories to Help Identify Templates** - In addition to descriptive and unique template names, place templates of similar usage in categories to help users identify the correct template to use. For example, you may consider grouping templates by their base functions such as reporting or marketing analysis. Create and assign templates to categories when adding the template to the Template Library.
- **Use Template File Name Extensions** - Users who download a file deliverable from a project can easily save it by mistake to a temporary folder where it may be difficult to find again. If you ensure that file templates have the file extension of a template of the related application (such as .dotx for Word documents or .xltx for Excel documents), then users are prompted to save the file to an accessible location when they save the downloaded template locally.
- **Verify Field Codes in Templates Prior to Adding Templates to the Library** - When you upload a template containing field codes to the library, mistakes in the name, such as {*MD:PorjectNam*} generate errors. However, mistakes in the pattern or source, such as {*ProjectName*} or [*MD:ProjectName} simply display the field code itself in the template rather than displaying the relevant data when opened in a project.
- **Specify Which Worksheets in an Excel File Contain Field Codes** - Accolade keeps track of documents using custom document properties that are created automatically when the template is first downloaded in an Accolade project. To improve the refresh speed of some Excel templates, use the **SGM_RefreshFieldsOnWorksheet** custom document property to specify which worksheets within the file contain Accolade field codes. Refer to Microsoft's online Help for information about adding custom properties to files.
- **Use the Template Library for Templates Beyond Accolade** - Use the Template Library to store not just templates used within Accolade, but also for templates used for documents not associated with the work you complete using Accolade. Add these types of documents to the library using the **Other** type.
- **Use Access Groups to restrict templates to subsets of Accolade users** - Using access groups, templates can be configured to only be accessible to a subset of users.

Sopheon recommends that you store the master Excel template (**Report - Excel <version>.xltx**) in a separate category in the Template Library.

Accolade Field Codes and Substitution Tokens

Add text strings (field codes) to file-based, project level documents and to online forms. When a user downloads or opens a document or form that contains field codes, the inserted codes are replaced with the current data from Accolade, such as a metric's current value or the name of the document's project. Field codes only work for documents that are uploaded into Accolade either manually or through the **Save to** Accolade feature or for online forms such as idea forms. Data does not refresh if the document version is created as a link to an external document.

Configuration



Downloaded from Project

Most field codes also work in project-level reports. Depending on what data is to be displayed, some Accolade fields can be added to reports. More kinds of codes can be successfully added to project-level reports than can be added to reports displayed on the Charts & Reports page, because most Accolade fields display information related to a specific project, the report needs to be associated with a single project to display the correct information. Project-level reports are associated with a specific project, while reports on the Charts & Reports page are not.

See Accolade Field Codes Reference in the Accolade online Help for a list of available field codes.

File-Based Field Code Format

Field codes in documents have the following basic pattern: **{****source***:***name****}**, where source identifies the general type of data displayed and name identifies the specific data. Data sources include metadata about a document, project, or document owner; custom names used at your company, images, reference table cells, and metrics. Field codes are not case sensitive.

The source identifies a group of codes that all display data that is from a similar location or used for a similar purpose. The available sources include:

- **IMAGE** - Displays images. Enter codes with the Image source in the Format (object) dialog box of an object or picture inserted in the document.
- **CONFIG** - Displays the custom names of some terms.
- **MD** - Displays metadata, additional data about a project, deliverable, gate, or activity. Metadata codes only work in their respective document types. For example, if you place an activity code in a gate document, no data displays as the gate document is not identified with an activity.
- **REFTABLE** - Displays the value in an Accolade reference table cell.
- **CHART** - Displays a specified chart created in Accolade.
- **QUICK GRID** - Displays a specified quick grid created in Accolade.
- **QUICK GRID ELEMENT** - Displays a specified cell from a specific quick grid created in Accolade.
- **REPORT** - Displays a specified report created using Accolade Online Reporting.
- **METRIC** - Displays the metric's value. Metric codes have additional, optional elements that can change what the field displays and how it behaves. A metric code with two of these additional options has this pattern: {*metric:name option option*}.
- **POD** - Displays a specified pod within a layout or custom project page.
- **FLAG** - Flags a slide as a specific type or assigns an action.
- **PORTFOLIO SUMMARY** - Tags a slide for the specific use in a portfolio presentation. Will contain portfolio information specified by the tag. .
- **MATRIX METRIC** - Displays a specified matrix metric created in Accolade. Only available for use in PowerPoint.
- **RICH TEXT MATRIX METRIC** - Displays a specified matrix metric containing rich text created in Accolade. Only available for use in PowerPoint.
- **RICH TEXT METRIC** - Displays a specified metric containing rich text created in Accolade. Only available for use in PowerPoint.

EXAMPLE Example

- {*MD:ProjectDescription*} - Displays display the description of the document's project.
- {*CONFIG:Deliverable*} - Displays the custom name used at your company for the term "deliverable."
- {*METRIC:NPV*} - Displays the value of the metric whose system name is NPV.
- {*METRIC:StyleOptions #ListItems_Pipe*} - Display the items in a List metric whose system name was StyleOptions.
- {*FLAG:RepeatForSelectedProjects*} - Repeats the slide that this field code is one, once for each project selected.

The name is the name of the data that the individual code displays. For example, an "MD" code displays metadata. The MD code using the name "ProjectID" displays the project's ID. The complete code is {*MD:ProjectID*}.

Online Form Field Code Format

Substitution tokens in online formats have the following basic pattern: *{*name*}*, where name identifies the specific data. Field codes are not case sensitive. For example, *{ProjectDescription}* displays the description of the document's project. Online form field codes are limited to project data, and do not include information such as custom names and metrics.

Behavior

The downloaded data from Accolade replaces the code itself within the document, but its effect on other information varies depending on the application:

Microsoft Application	Field Code Replacements
Word	Downloaded data replaces the code, leaving text surrounding the code unchanged.
Excel	Downloaded data replaces all content in the cell that contains the code. Add only one code per cell.
PowerPoint	Downloaded data replaces all text in the shape that contains the code. Add only one code per shape.

Metric Field Codes with Options

To create a report showing the system names of all current metrics, use Accolade Office Extensions or Accolade Online Reporting to create a report that includes the Metric Display Name and Metric System Name columns from the Metric Definitions subject.

Use metric field codes to do the following:

- Display a metric's value.
- Display other data related to the metric.

- Update a metric value (only in the case of a Long String type metric in a Word document that is not a related document).

The basic pattern of a metric field code is the same as for other codes: ***{*source:name*}.*** For metric codes, the source is always "Metric", and the name is the system name of the metric. For example, {*METRIC:TCost*} displays the value of the metric whose system name is "TCost".

Note: Because a metric code uses the metric's system name, if a metric's system name changes, you must update any templates or reports that contain a code for that metric.

Important! This does not apply to MetricRichText tokens.

Option Patterns

Metric codes have optional additions to the basic pattern. Options can:

- Make the code display something other than the metric value.
- Change how the value is displayed.
- Enable the code to update a metric value in addition to displaying it. This capability is limited to codes for Long String type metrics in Word documents that are not related documents.

If options are added, they are listed after the code's name. The pattern for a metric code with options is: ***{*METRIC:name option*}***. The name and options, if any, are separated by a space.

EXAMPLE Example

{*METRIC:NPV #DisplayName*} would show the NPV metric's display name rather than the metric value. And {*METRIC:NPV #ProjectCurrency #Format2*} would display the value in the project currency using that currency's second format.

There are two types of options, primary and secondary:

- **Primary Option** - Identifies the data that replaces the value, so a code can contain only one primary option.
- **Secondary Option** - Specifies how the field code behaves, so a code can contain one or more secondary options either in addition to or without a primary.

The options in the table below are intended for use in ordinary, non-updating codes while the options in the second table are for codes that update Long String metrics in Word. ***Options in one table should not be combined in the same code with options from the other table.***

Metric Code Options

Some options in the following table can be used with all types of metrics, while others should be used only in certain types, as shown in the table.

Option	Option Type	Description
All Metric Types		
#DisplayName	Primary	Displays the metric's display name.
#Description	Primary	Displays the metric's description.
#DataType	Primary	Displays the metrics data type.
#OnceOnly	Secondary	The field refreshes only once, then the persisting bookmark is deleted. Add a code with this option to a Smart Excel cell to display the metric value once, after which the same cell updates the metric.
Only List Metrics		
#ListItems_Pipe	Primary	Displays the metric's list items in a pipe-delimited string.
#ListItems_Comma	Primary	Displays the metric's list items in a comma-delimited string.
#ListItems_CR	Primary	Displays the metric's list items in a carriage-return-separated list.
#ListItems_Table	Primary	Displays the metric's list items in a table format.
Only Currency Metrics		
#ProjectCurrency	Primary	The metric's value is given in the project currency.
#CorporateCurrency	Primary	The metric's value is given in the corporate currency.
#Format1	Secondary	The metric value is displayed using the first number format listed in the Currency reference table.
#Format2	Secondary	The metric value is displayed using the second number format listed in the Currency reference table.

Long String Metrics Update Options

A metric field for a Long String type metric can update the metric's values when the code is inserted in a Word document. The metric is updated in Accolade when the document is saved back to Accolade. If the document version is created as a link to an external document or web page, the metrics does not update when the document is published.

Important! Long string metric field codes apply only to Word documents and are not applicable in other Microsoft applications. This feature is not supported for related documents.

This kind of code has three options. These options cannot be used in non-updating codes, and the options listed in the table above should not be added to updating codes.

Option	Option Type	Description
#Updateable	Secondary	This metric can be updated by the code if this option is present.
#DefaultValue=(value)	Secondary	Displays the text following "=" when the metric is empty in Accolade. If the # character is part of the value, enter "##" in the template. **Important!** If there is no default value, a string of spaces is inserted into the field. To edit the field, delete the spaces before entering text.
#MaxLen=(value)	Secondary	Sets a maximum length, in characters, for the field. The value must be a number under 2000. If this option is not used in the code, the metric field has a size limit of 2000 characters.

Example

For a Long String type metric named BusiCase:

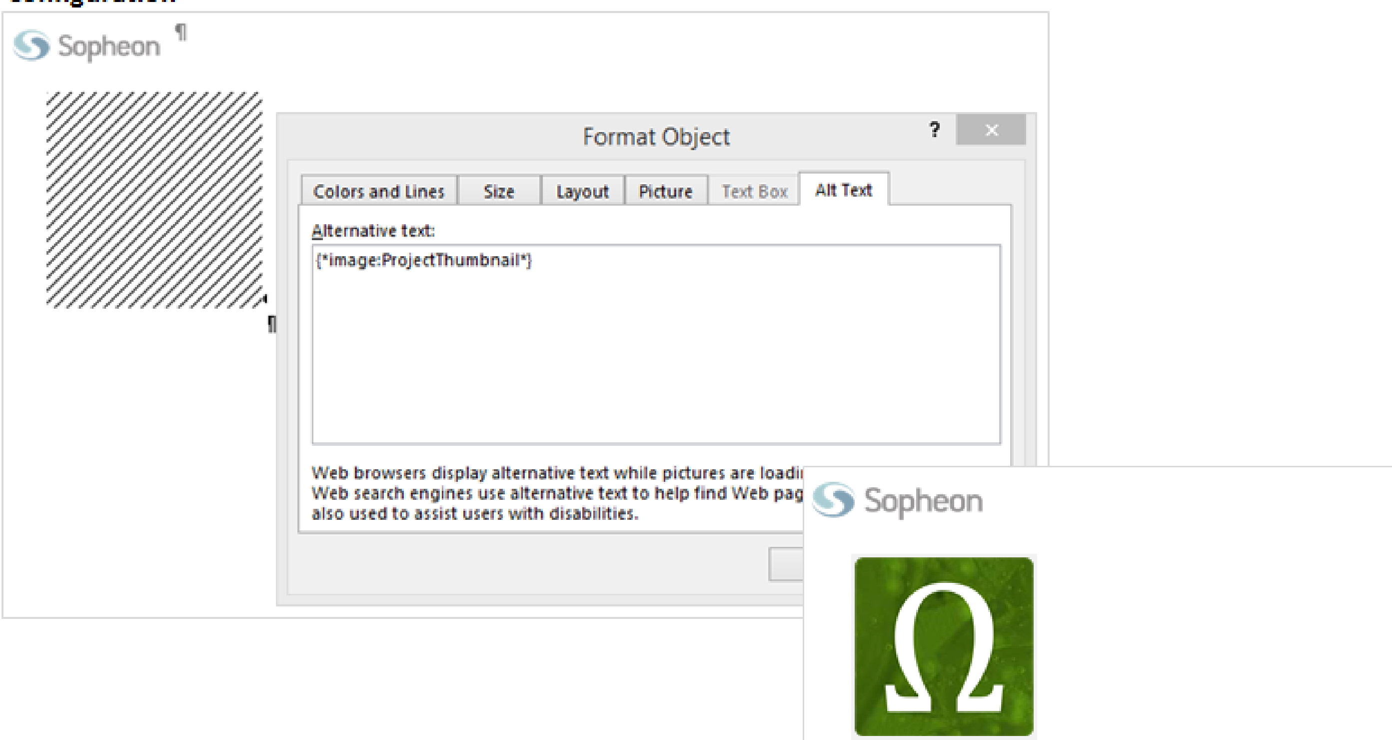
- The code {*Metric:BusiCase #Updateable*} allows the metric to be updated.
- The code {*Metric:BusiCase #Updateable #MaxLen=500 #DefaultValue=Enter the business case*}:
  - Would allow the metric to be updated.
  - Would allow the user to enter up to 500 characters in the field.
  - Would display the text "Enter the business case" if the metric was empty when the document was opened.

Adding Images to Documents Using Accolade Field Codes

You can add project-related images to documents, spreadsheets, and presentations using Accolade fields. Use image field codes to displays the images that are associated with the codes for each project. Accolade contains the following standard image field codes. Your company may have defined addition codes specific to your site.

- {*image:ProjectMain*} - Displays the image intended to represent the project in documents.
- {*image:ProjectThumbnail*} - Displays the project's thumbnail image.
- {*image:ProjectProcessGraphic*} - Displays the model graphic that shows the stages and gates in the project.

Configuration



Downloaded from Project

To add an image to a document using an Accolade field code:

1. Open the document to modify.
2. On the **Insert** tab, click **Object** in the **Text Category**.
3. In the **Create New** tab, select **Bitmap Image** and click **OK**.

   You can also insert a picture from a file rather than an Object.
4. In the document, click the space where the empty object was inserted, right-click the object outline, and select **Format Object**.
5. Display the **Alt Text** options for the object.

   This may be a tab in a dialog box, or in the Size & Properties options in a panel.

6. Enter the appropriate image field code in the **Alternative Text** box (in a document or spreadsheet), or in the **Description** field (presentation).
7. Set the height, width, and rotation for the image.

   If you do not know what size the image should be, you can set an approximate size, and the document owner can set the exact size after the image has been selected in the project.

   To make the object window the same size as the image after it is inserted, open the Format Picture dialog box. On the **Size** tab, clear the **Lock aspect ratio** check box, then make sure that **Height** and **Width** (under Scale) equal 100% and that the **Relative to original picture size** check box is selected. After the distortion is removed, select the **Lock aspect ratio** check box again.

8. Save the version to Accolade and then download the new version to ensure the image displays correctly.

Notes:

- The images initially display in a size that completely fills the object window in the document, not in the dimensions shown in Accolade. Images may appear distorted.
- Images do not display in project documents until images are associated with the appropriate field codes in the project.

Exercises - Using Accolade Field Codes

Try out what you have learned!

- Create a document and add the {*MD:ProjectName*}.
- In a separate paragraph in the file, add a field code to display a project's thumbnail image.
- Save the template to the template library.

Templates to Update Project Data Overview (Smart Excel)

Smart Excel templates are special template files that deliverable and activity owners can use to update project data. Rich text metrics do not display in Smart Excel templates.

Use a Smart Excel template with Accolade field codes representing Accolade data to do the following:

- Display metrics, matrices, and metadata in deliverable, activity, and gate documents.
- Update project metrics, matrices, and/or metadata when a version of a document is published to Accolade.
- Use formulas to manipulate metric values and perform data validation checks.
- Edit deliverable or activity details, such as start dates and status notes.
- Add or remove activities attached to deliverables.

- Display a project's resource plan in a deliverable or activity document and request project resources (if running the resource planning functionality in Accolade).
- Work offline and upload information to Accolade later.

Base Templates

Each Accolade release contains a set of base templates you can use to build templates for your business.

The **Process Document - Smart Excel <version>.xltx** file is available or on the Base Templates Reference Page. The template contains the basic worksheet structure required to create Smart Excel templates to update project metric, matrix, and metadata values. The worksheets you use in each template depends on the project data the template updates.

- **Sheet1** - Contains the data that displays to the deliverable or activity owner and eventual readers of documents based on the template. This is the only worksheet that someone who is not building the Smart Template components interacts with. You can add more display worksheets to the template, if necessary.
- **SGM_MetricTransfer** - Manages the display or update of metric data in a single project.
- **SGM_Metadata** - Manages the display or update of project metadata.
- **SGM_RelatedProjectMetrics** - Manages the display or update of metric data in projects related to the project the template is included in.
- **SGM_DeliverablesActivities** - Manages the addition or removal of activities, or the edit of a deliverable or activity.
- **SGM_Notes** - Contains Sopheon recommendations and suggestions for using the file to create Smart Excel templates.

The **Resource Plan Template - Basic <version>.xlsx** file, also available on the Base Templates Reference Page, applies if you are running the resource planning functionality in Accolade, and contains the worksheet required for a deliverable or activity owner to create a resource plan request. A deliverable or activity owner with enough information can enter pool names, resources, and so on, for each resource request.

Administrators and Process Designers use the worksheets in the template to build the display and map the Accolade data. Deliverable and activity owners interact only with the display sheets to view and update project information and save it back to Accolade. Depending on the template design, it is possible that deliverable and activity owners can update project data using a Smart Excel template that they cannot update through the project pages within Accolade.

Creating Excel Templates to Update Metrics in a Single Project

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update metrics within their projects. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

The procedure below describes how to add metric fields to an Excel template that display and update values when published to Accolade for a single project. A single template can also contain project metadata, matrices, and metrics in related projects.

To setup an Excel template that updates metrics in a single project:

> **Note:** The following procedure assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
2. *(Optional)* Hide the **SGM_Metadata, SGM_RelatedProjectMetrics, SGM_ DeliverablesActivities,** and **SGM_Notes** worksheets, as none are required for metrics updates in a single project; however, do not delete them.
3. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
   - Cells that only display data from Accolade. This can be metric data or project metadata from Accolade.
   - Cells that only upload metric values to Accolade.
   - Cells that display a metric value when the document is first opened, and upload any changes to the value to Accolade.
   - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

   Enter all the labels, column headings, background color, formulas, and so on, into the cells that *do not* receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

   It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

   You can add additional display worksheets, as necessary.
4. Add a new worksheet and enter the Accolade field codes that represent the data to display within the display worksheet.

   Do not leave blank rows in the list of codes.
5. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template. For example, Post-Launch Review Scorecard.
6. Create cell references between the display worksheet (originally **Sheet1**) and the worksheet added in step 4.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, create a cell reference for each cell that displays data to the appropriate cell on the worksheet that contains the field codes. Protect and lock the cells on the display worksheet that contain references to the field codes worksheet.
Cells that display a metric value when the document is first opened, and uploads any changes to the value to Accolade	For each cell in the display worksheet that displays a value when the document is first opened, and uploads any changes to the value, enter a metric field code that includes the **#OnceOnly** option. For example, {*METRIC:NPV #OnceOnly*}.

7. For each cell in the display worksheet that uploads a new metric value to Accolade, complete the columns in the **SGM_MetricTransfer** worksheet.
   - **Metric System Name** - Enter the system name of each metric that is updated using the template.
   - **Metric Display Name** - Enter the display name of the metric that is updated using the template.
   - **Current Value String** - The current value if the metric is a String or Long String type.
   - **Current Value Number** - The current value if the metric is a Number type.
   - **Current Value Date** - The current value if the metric is a Date type.
   - **Data Type** - The metric data type. Acceptable values include String, Long String, Number, List, Multi-Select List, and Date.
   - **List Values** - The acceptable values if the metric is a List or Multi-Select List type.
   - **Publish will use New Value column** - Enter **Y** in a metric row if the value entered for this metric in the display worksheet uploads to Accolade or enter **N** if the value is only displayed in the worksheet.
   - **New Value** - Enter cell references to the cells in the display worksheet that users use to enter new metric values. Do not type anything into this column after entering the cell reference.

   Do not place any intermediate formulas in the **SGM_MetricTransfer** worksheet, do not delete the first two rows, and do not rename the worksheet.

8. Protect the display worksheet.

   Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

   Important! Do not protect the entire workbook. The **SGM_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

   ---

9. In the display worksheet, remove the lock on the cells that users use to update metric values.
10. Hide the **SGM_MetricTransfer** worksheet and the worksheet you added that contains the list of field codes, as these are worksheets that users interacting with the template do not need to see.

    Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

11. Save the file and add the template to the Template Library.

Notes:

- Sopheon recommends that all **SGM_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.

Creating Excel Templates to Update Metrics in Related Projects

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update metrics in projects related to the project the template is included in. Updates are only made in projects to which the owner has access. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

The procedure below describes how to add metric fields to an Excel template that display and update values in related projects when published to Accolade. A single template can also contain project metadata, matrices, and metrics in a single project.

To setup an Excel template that updates metrics in related projects:

Note: The following procedure assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
2. *(Optional)* Hide the **SGM_MetricTransfer, SGM_Metadata, SGM_DeliverablesActivities,** and **SGM_Notes** worksheets, as none are required for metrics updates in related projects; however, do not delete them.
3. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
    - Cells that only display data from Accolade. This can be metric data or project metadata from Accolade.
    - Cells that only upload metric values to Accolade.
    - Cells that display a metric value when the document is first opened, and upload any changes to the value to Accolade.

- Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

You can add additional display worksheets, as necessary.

4. Add a new worksheet and enter the Accolade field codes that represent the data to display within the display worksheet.

   Do not leave blank rows in the list of codes.

5. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.

6. Create cell references between the display worksheet (originally **Sheet1**) and the worksheet added in step 4.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, create a cell reference for each cell that displays data to the appropriate cell on the worksheet that contains the field codes. Protect and lock the cells on the display worksheet that contain references to the field codes worksheet.
Cells that display a metric value when the document is first opened, and uploads any changes to the value to Accolade	For each cell in the display sheet that displays a value when the document is first opened, and uploads any changes to the value, enter a metric field code that includes the **#OnceOnly** option. For example, {*METRIC:NPV #OnceOnly*}.

7. For each cell in the display worksheet that uploads a new metric value to Accolade, complete the columns in the **SGM_RelatedProjectMetrics** worksheet.

   - **System Project ID** - Enter the project ID of the project to update using the template. This is the project ID, not the project name. When the file that uses the template is uploaded, Accolade searches for the project IDs and determines if the projects are related to the project in which the template is used, up to five levels deep.
   - **Metric System Name** - Enter the system name of each metric that is updated using the template.
   - **Metric Display Name** - Enter the display name of the metric that is updated using the template.
   - **Current Value String** - The current value if the metric is a String or Long String type.
   - **Current Value Number** - The current value if the metric is a Number type.

- **Current Value Date** - The current value if the metric is a Date type.
- **Data Type** - The metric data type. Acceptable values include String, Long String, Number, List, Multi-Select List, and Date.
- **List Values** - The acceptable values if the metric is a List or Multi-Select List type.
- **Publish will use New Value column** - Enter **Y** in a metric row if the value entered for this metric uploads to Accolade or enter **N** if the value is only displayed in the worksheet.
- **New Value** - Enter cell references to the cells in the display worksheet that users use to enter new metric values. Do not type anything into this column after entering the cell reference.

Do not place any intermediate formulas in the **SGM_RelatedProjectMetrics** worksheet, do not delete the first two rows, and do not rename the worksheet.

8. Protect the display worksheet.

   Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

   Important! Do not protect the entire workbook. The **SGM_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

   ---

9. In the display worksheet, remove the lock on the cells that users use to update metric values.
10. Hide the **SGM_RelatedProjectMetrics** worksheet and the worksheet you added that contains the list of field codes, as these are worksheets that users interacting with the template do not need to see.

    Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

11. Save the file and add the template to the Template Library.

Notes:

- Sopheon recommends that all **SGM_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.

Creating Excel Templates to Update Project Metadata

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update project metadata, such as gate dates and project start and end dates, within their projects. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

The procedure below describes how to add project metadata to an Excel template that displays and updates values when published to Accolade. A single template can also contain metrics, matrices, and metrics in related projects.

To setup an Excel template that updates metadata:

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
2. *(Optional)* Hide the **SGM_MetricTransfer, SGM_RelatedProjectsMetrics, SGM_DeliverablesActivities**, and **SGM_Notes** worksheets, as none are required for a metadata update; however, do not delete them.
3. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
   - Cells that only display downloaded data from Accolade.
   - Cells that only upload changed values to Accolade.
   - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

   Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

   It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

   You can add additional display worksheets, as necessary.
4. In the **SGM_Metadata** worksheet, enter one or more of the following metadata field names into the **Name** column. These metadata names represent project metadata that users can update using the spreadsheet.
   - ActivityDeadline
   - ActivityPlannedFinishDate
   - ActivityStart
   - ActivityStatusID
   - DeliverableDeadline
   - DeliverablePlannedFinishDate
   - DeliverableStart
   - DeliverableStatusID
   - ProjectStartDate
   - ProjectEndDate
   - ProjectGateDate-*(gate number)* **Enter a dash and the gate number (no spaces) after the name.
   - ProjectName

- ProjectID **This is the displayable project ID, *not* the SysProjectID
- ProjectDescription

You can add other metadata names to the **Name** column for *display* on the display worksheet; however, only the metadata names listed above can be updated using the template.

5. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.
6. In the **SGM_Metadata** worksheet, enter **Y** or **Yes** in the **Publish will use New Value** column to update the project with values in the **New Value** column when a new version of the file that uses the template is published in Accolade.
7. Create cell references between the display worksheet (originally **Sheet1**) and the **SGM_Metadata** worksheet.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, in the cells that display the current metric value when the document is downloaded and opened, create cell references to the corresponding "current value" cells in the **SGM_Metadata** worksheet.
Cells that document owners change to upload back to Accolade	On the **SGM_Metadata** worksheet, in the "new value" cells, enter cell references to the cells on the display worksheet where the document owner enters new values to upload back to Accolade.

8. Protect the display worksheet.

   Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

   Important! Do not protect the entire workbook. The **SGM_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

   ---

9. In the display worksheet, remove the lock on the cells that users use to update metric values.
10. Hide the **SGM_Metadata** worksheet, as this is a worksheet that users interacting with the template do not need to see.

    Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

11. Save the file and add the template to the Template Library.

Notes:

- Sopheon recommends that all **SGM_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.

- You can add the **SGM_Metadata** worksheet to any version of a Smart Excel template. It is not necessary to update the template to the latest version to update the listed types of metadata. Add **columns headings** in the first row of the sheet from left to right: Name, Current Value String, Current Value Number, Current Value Date, Publish will use New Value, New Value.

Creating Excel Templates to Update Deliverables and Activities

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to complete deliverable and activity information such as adding or deleting activities, and editing deliverable or activity details such as status and status notes, owners and functions, or start and deadline dates. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

A template that updates activities and deliverable details must contain at least the following worksheets:

- **Display worksheet** - A worksheet within the template that document owners use to enter values and that is formatted to make data entry obvious. This is typically Sheet1 in the template. There can be more than one display worksheet.
- **SGM_DeliverablesActivities worksheet** - A worksheet within the template that contains two copies of the deliverable or activity details, arranged side by side. The copy on the left contains the current values that are downloaded when the template is downloaded from a project within Accolade. The copy on the right contains the values that are added, edited, or deleted when the deliverable or activity is uploaded and published.

The following procedure provides basic information about how to setup the template. The specific document and its function dictate the formulas and other operations to populate the template. A single template can also contain project metadata and metrics. A single template can also contain metrics, project metadata, and metrics in related projects.

Important! The template ***cannot*** add or delete deliverables.

To setup an Excel template that modifies deliverable or activity details:

Note: The following procedure assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
2. *(Optional)* Hide the **SGM_MetricTransfer, SGM_Metadata, SGM_RelatedProjectMetrics**, and **SGM_Notes** worksheets, as none are required for deliverable or activity updates; however, do not delete them.

3. Save the file, add it to the Template Library as a Process Document type, and add the template to a deliverable or activity in a model that uses the template.
4. Open a test project that uses the model and download the template to populate for the deliverable or activity in the **SGM_DeliverablesActivities** worksheet for the specific deliverable.
5. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
   - Cells that only display downloaded data from Accolade.
   - Cells that only upload changed values to Accolade.
   - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

   Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

   > It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

   You can add additional display worksheets, as necessary.
6. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.
7. Create cell references between the display worksheet (originally **Sheet1**) and the **SGM_DeliverableActivities** worksheet.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, in the cells that display the current metric value when the document is downloaded and opened, create cell references to the corresponding "current value" cells on the left side of the **SGM_DeliverableActivities** worksheet. You can also use field codes to pull metadata and metrics into the document.
Cells that document owners change to upload back to Accolade	On the **SGM_DeliverablesActivities** worksheet, in the "new value" cells on the right side of the worksheet, enter cell references to the cells on the display worksheet where the document owner enters information that determines what information is added, updated, or removed for the deliverable and activities to which this template is associated. See step 8 for the columns on the right side of the **SGM_DeliverablesActivities** worksheet that can *update* data.

8. In the **Action** column on the right side of the **SGM_DeliverablesActivities** worksheet, ensure that a formula or mapped cell enters one of the following values:

   - **ADD** - Adds a new activity to the deliverable identified in the **Deliverable ID** column. The template can only add activities; it cannot add deliverables. If the **Action** column is set to **Add**, the ID entered in the **Activity ID** column is ignored. You do not need to enter a value for the template to add the activity.
   - **DELETE** - Deletes the activity from the deliverable. The template can only delete activities; it cannot delete deliverables. The document must be set in the process model to allow deletions of versions.
   - **UPDATE** - Updates the deliverable or activity information to match what is in the columns on the right side of the worksheet when the document based on the template is uploaded and published.

     To update an existing deliverable or activity, the Deliverable ID and Activity ID must match the original ID in column A and B for the corresponding deliverable or activity. The template can update data contained in the following columns on the right side of the **SGM_ DeliverablesActivities** worksheet:

     - Name
     - OwnerLogin (see notes section below)
     - Start
     - Deadline
     - Function System Name (see notes section below)
     - Status ID (see notes section below)
     - Status Notes

   If the **Action** field is blank or contains any other value, no action is taken on the deliverable or activity identified in that row when the document is saved and published to Accolade.

9. Protect the display worksheet.

   Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

   Important! Do not protect the entire workbook. The **SGM_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

   ---

10. In the display worksheet, remove the lock on the cells that users use to update metric values.
11. Hide the **SGM_DeliverablesActivities** worksheet, as this is a worksheet that users interacting with the template do not need to see.

    Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

12. Save the file and add the template to the Template Library.

Notes:

- Valid status IDs are as follows:
  - 1 - Completed.
  - 2 - In Progress
  - 3 - Not Started
  - 5 - Not Required
- If the **Enforce function on user selection** option is selected for a deliverable or activity within the process model the project follows, you cannot change the function using this template. The owner in the **OwnerLogin** column must be assigned the function in the **Function System Name** column when the enforce option is set.
- The Workflow in Progress status can only be set through the Accolade website or in Microsoft Project plans.
- Enter all dates in dd-mmm-yy format. Dates that do not use this format are not updated when the file is uploaded to Accolade.
- Sopheon recommends that all **SGM_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.

Creating Excel Templates to Update Project Matrices

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update a project matrix. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

A matrix template can contain more than one matrix, but each matrix is typically managed by the following two worksheets:

- **Display worksheet** - A worksheet within the template that template users use to enter values on and that is formatted to make data entry obvious. This is typically Sheet1 in the template. There can be more than one display worksheet.
- **Matrix worksheet** - A worksheet within the template that contains two copies of a single matrix arranged side by side. The copy on the left contains the current, downloaded metrics values. The copy on the right contains the values that the template users enter to upload to Accolade. There can be more than one matrix in the template; however, there can only be one matrix per matrix worksheet, and each matrix in the template must be unique.

The procedure below describes how to add a matrix to an Excel template that displays and updates values when published to Accolade. A single template can also contain metrics, project metadata, and metrics in related projects.

Important! If using the calculated metric expression CurrentMatrixValue in a matrix and updating the matrix in Excel, you must uniquely identify other matrix rows by flagging metrics as unique. If matrix columns are not unique or the Excel workbook contains duplicate columns, the Smart Excel template does not update, upload, or publish back to Accolade.

To set up an Excel template to update a project matrix:

Note: The following procedure assumes that you have created the matrix within Accolade, added its metrics, and associated it with the appropriate models. The following procedure also assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
2. *(Optional)* Hide the **SGM_MetricTransfer, SGM_Metadata, SGM_RelatedProjectMetrics, SGM_DeliverablesActivities**, and **SGM_Notes** worksheets, as none are required for a matrix update; however, do not delete them.
3. Add a new worksheet and name it **SGM_MX_*<matrix system name>***.

   This sheet is the matrix sheet. The matrix system name must match the system name assigned to the matrix in Accolade exactly. Add additional sheets for each matrix, as necessary.
4. Save the file, add it to the Template Library as a Process Document type, and add the template to a deliverable or activity in a model that has the matrices associated to it.
5. Open a test project that uses the matrices for which you created worksheets for in step 3, navigate to the deliverable or activity it is assigned to, and download the template.

   Downloading the template from a project populates the matrix worksheet with two copies of the matrix.
6. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
   - Cells that only display downloaded data from Accolade.
   - Cells that only upload changed values to Accolade.
   - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

   Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

   It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

   You can add additional display worksheets, as necessary.
7. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.

8. Create cell references between the display worksheet (originally **Sheet1**) and the matrix worksheet(s) created in step 3, adding references to only cells in the right copy of the matrix where values are loaded to Accolade.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, in the cells that display the current metric value when the document is downloaded and opened, create cell references to the corresponding "current value" cells on the left side of appropriate matrix worksheet.
Cells that document owners change to upload back to Accolade	On each matrix worksheet, in the "new value" cells in right side of the worksheet, enter cell references to the cells on the display worksheet where the document owner enters new values to upload back to Accolade. Only add cell references to cells in the right copy of the matrix where values are uploaded to Accolade. Cell references or formulas added below the cell references that make up the table in the right copy cause NULL rows or invalid data to be added to Accolade.

9. Protect the display worksheet.

   Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

   Important! Do not protect the entire workbook. The **SGM_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

   ---

10. In the display worksheet, remove the lock on the cells that users use to update metric values.
11. Hide the **SGM_MX_*<matrix system name>*** worksheet created in step 3, as this is a worksheet that users interacting with the template do not need to see.

    Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template, to default the cursor to that cell when the template is opened.

12. Save the file and upload the new version to the template to the Template Library.

Matrix Sheet Layout

When you open the template from a test project, the matrix sheet is populated with two copies of the matrix that manage the upload and download in the worksheet that matches the matrix system name. The copy on the left contains "current" values that are downloaded to the worksheet from Accolade. The copy on the right contains "new" values to update to Accolade. The metric names are prefixed with **New** in the headers in the copy on the right.

Each copy contains the following:

Column	Description
Row ID	The leftmost column of each matrix copy. The other columns contain the metrics. The workbook does not use the numbers in the **RowID** column to identify the rows. Rows are identified by their position below the headings in the sixth row. You can enter whatever row ID numbers or names are most useful to you to orient yourself on the sheet.
Metrics	The metrics contained in the matrix. Each metric contains the following information. • **Row 1** - Display names of relative date metrics. • **Row 2** - Periods (month, quarter, or year) of relative date metrics. • **Row 3** - Current relative to dates of relative date metrics. • **Row 4** - Indicates whether a metric is set to be unique within the matrix. "Y" or "N" for all metrics. The template does not enforce the uniqueness of a metric. The indicator is only a reminder of which columns, or combinations of columns, should contain unique values. • **Row 5** - List items for list metrics. The cell contains all of the list values for the list metric in the column, including cascading (filtered) lists. • **Row 6** - The system names for each metric. • **Row 7** - Column headings are the display names for each metric. • **Row 8 and below** - Metric values from the display sheet in the left copy of the matrix. In the right copy, cell references to the display worksheet.

Important! Do not edit or delete the "current" values in the copy on the left. Removing these values will cause errors with your worksheet upload.

Exercises - Creating Smart Excel Templates

Try out what you have learned!

- Using the **Process Document - Smart Excel<*version*>.xlt** (if available), create a simple Smart Excel template that allows users to update a single metric.
- In the same template, define a cell that allows users to update the project description.

Adding File-Based Templates to Deliverables and Activities

After a template is created and available in the Template Library, the final step to implementing the template is to associate it to a deliverable or activity in a process model. You

- You can associate one template to a single deliverable or activity.
- You can associate the same template to multiple deliverables or activities in the same model or across different models.

To add a template to a deliverable:

1. From the **Process** menu, select **Models**, and select the model to edit.
2. In the Model tree, select the deliverable or activity to modify.
3. In the **Template** field, click and choose the template to include in the deliverable or activity within the project.

   To clear a selected template, click and click **Clear**.
4. To ensure that all the template is updated with project information before the deliverable or activity is complete, select the **Disable Complete status when no document version is published** check box.

   When selected, the deliverable or activity cannot be set to **Complete** unless a published version of a deliverable is available.
5. Click **Apply** to save your changes.

Adding Templates to the Template Library

The Template Library is the repository for templates available for use throughout Accolade. Images added to the Template Library are available to image pods in page layouts. Administrators and Process Designers can also use the Template Library as a repository for templates that are useful across your organization, but that may not have a use as a deliverable, activity, gate document, form, or report within Accolade.

To add a template to the Template Library:

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

   To narrow the list, search by the template name, system name, or category.
2. Do one of the following:
   - **To add a new template to the library** - Click **Add New** in the top right corner of the page.
   - **To edit an existing template** - Click the name of the template to display its details page for editing.
3. Complete the following information to identify the template file:

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

Field	Description
Name	Enter a unique name, up to 64 characters long, which identifies the template.

Field	Description
	Template names and file names within the library must be unique. The name entered here can be the same as the file name, but each name and file name must be unique across all templates.
System Name	Enter a name that will uniquely identify this template. This name must be unique from other template system names, and can only contain letters (English alphabet), numbers, and the underscore.
Type	Select the type of template you are creating: • **Online Form** - The basis for online forms for deliverables, idea forms, and activity documents. These templates are XML files that display text and software controls in the client browsers, allowing users to work with documents without uploading or downloading files. • **Process Document** - The basis for creating file-based deliverables, activities, or gate documents. These templates can be any Microsoft Windows compliant file, including Smart Excel templates. All gate document templates must use this file type. • **Spreadsheet Report** - The basis for reports viewable in the **Charts & Reports** page or on the **Reports** page within a project. These templates are spreadsheet files, including those created using the Accolade Office Extensions add-in. • **Presentation** - The basis for creating a portfolio presentations. These templates are Microsoft PowerPoint files. • **Project Plan** - The basis for creating Microsoft Project plans for projects using Accolade integration with Microsoft Project. These templates must have a .mpp.file extension. **Note:** Accolade's integration with Microsoft Project is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support. If you do not have access, this template type will not be an available option. • **Image** - The basis for saving images for use in places such as page layouts. To display as an image, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, jfif, or .png. Project images that are added as related documents do not need to be stored in the Template Library. • **PDF, Email, Other** - Use this type for template files stored in the library for templates that may be useful throughout your organization, but are not associated to a deliverable, activity, or gate document.

Field	Description
Category	Enter or select the group to which this template belongs. Use categories to organize similar templates together. For example, create a category for deliverables and one for reports, or create categories based on document type, such as requirements and design. • 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.
Description	Enter a description of the purpose or nature of the template. This description helps other users identify the template throughout the system.
Configuration Access Groups	Select the access groups to which the template belongs. Process Designers with matching permissions will be able to edit and view templates. The access groups displayed are based on the current user's access group permissions and the access groups the template belongs to.
Process Model Usage	Click the **Process Model Usage** button to see the list of process models that the template is associated with. The list includes all process models the templates is included in, as well as links to the process model's component tree pages you have Edit access to.

4. If you are adding a new template or replacing an existing template, click in the **File** field, and select the template file to upload.

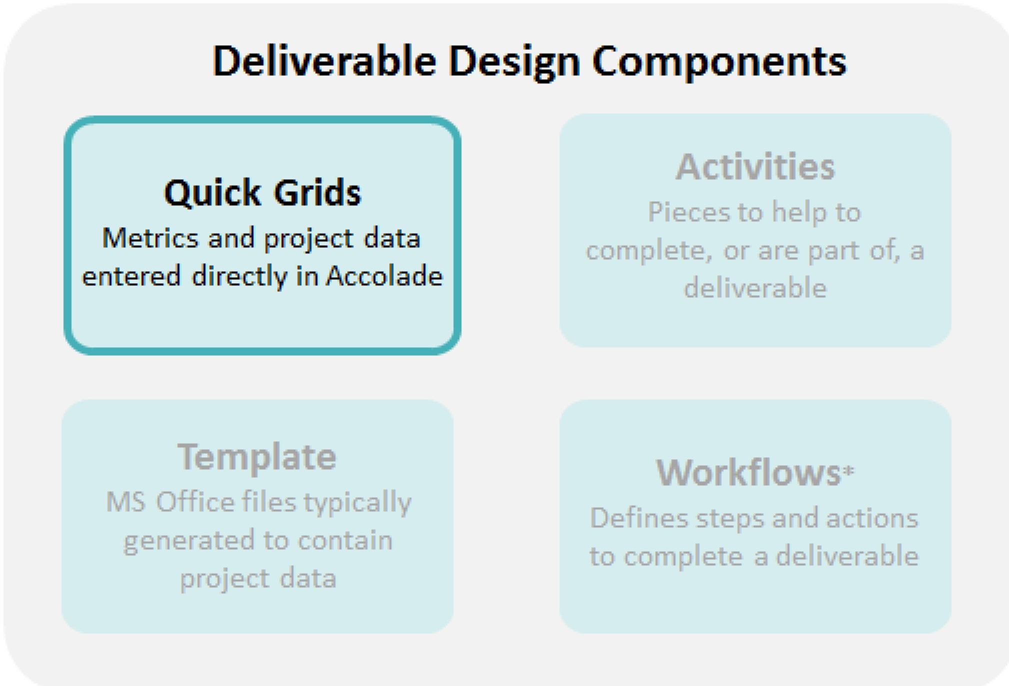
   If you are editing an existing template, click the file icon next to the template name to download the current template version for review and edits.

5. Click **Create** to add the new template or **Apply** to save changes to an existing template.

Notes:

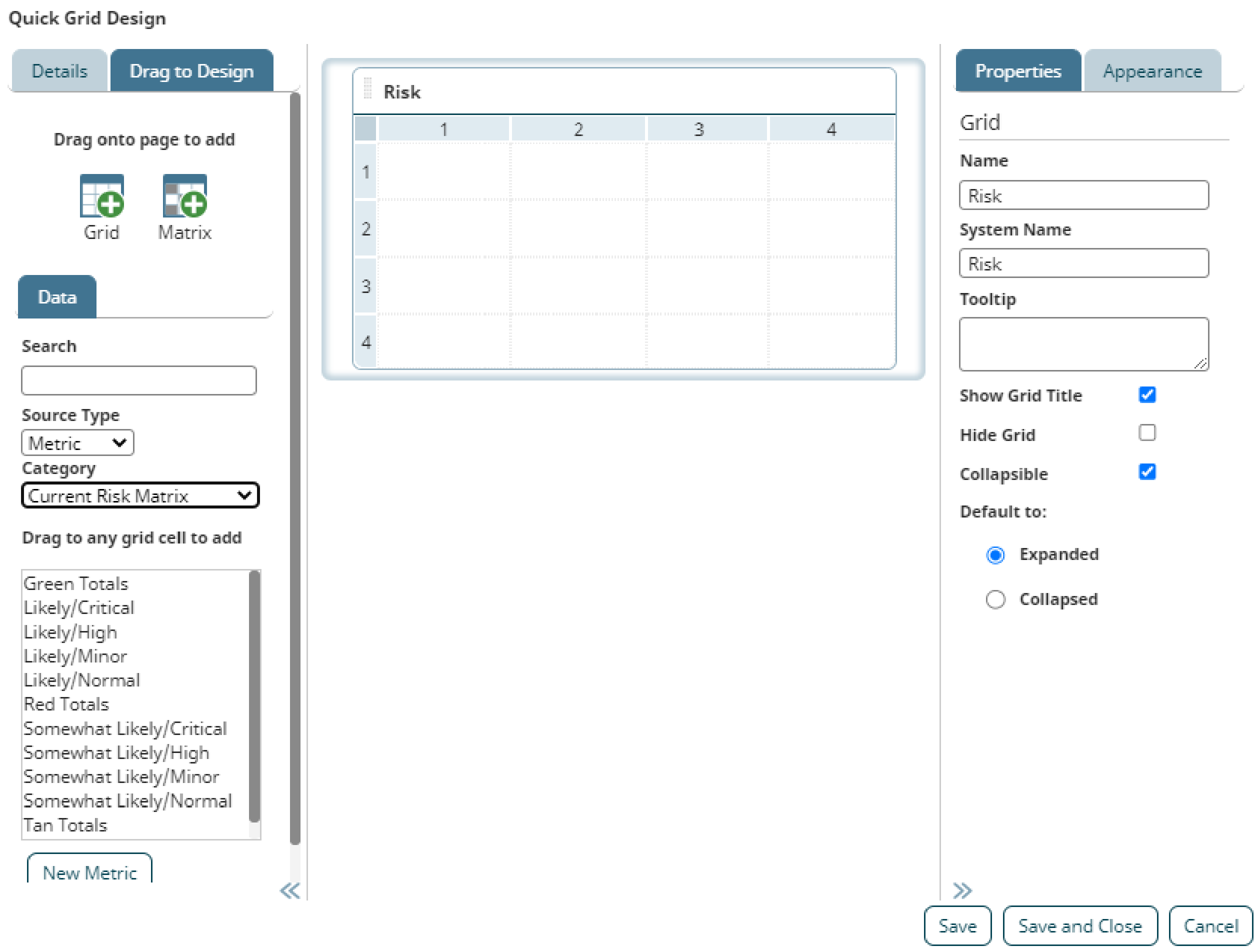
- To delete a template from the Template Library, display the template in the Template Library and click **Delete**. You cannot delete a template if it is used as the idea deliverable in a model. You cannot delete an MS Excel report template that is in use.

Quick Grids for Data Collection Overview



A quick grid is a collection of one or more customizable grids that is associated with a deliverable or activity that provides another location to enter information during a project. Quick grids are added to deliverables and activities in a process model, in much the same way as a template.

Adding the appropriate metrics and other data collection points to a grid allows the assigned deliverable or activity owner to conveniently manage the metrics and data collection directly on the screen, without having to download a template, update the document and save the results to Accolade. Quick grids also allow other members of the project to view the specific metrics and data associated with each deliverable or activity in a read-only version of the grid.



A quick grid can contain one or more of the following grid types:

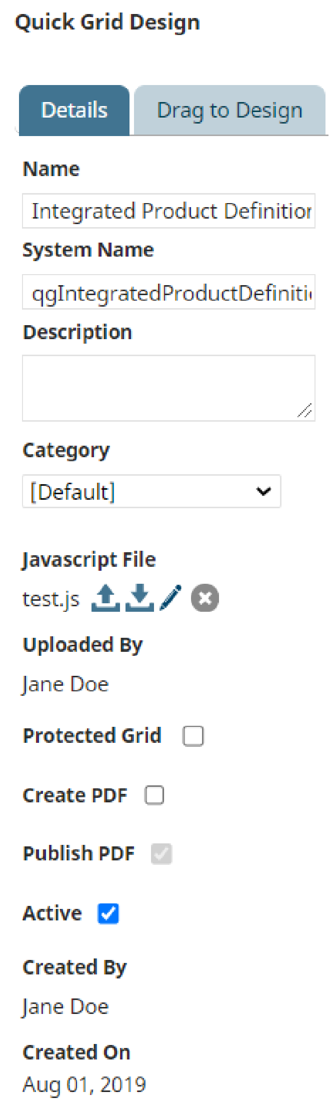
- **Standard Grid** - Standard grid that includes metrics to update and other components such as buttons and fields to enter text.
- **Matrix Grid** - Matrix grids include columns of an existing matrix, rather than a cell-by-cell grid definition and allow deliverable and activity owners to add additional rows to the grid as necessary.

Process Designers associate quick grids to deliverables and activities in a process model. Any metrics referenced within the quick grid, and the matrices in matrix grids, are associated automatically with the model when the grid is added to a deliverable or activity. Quick grids are only editable during the current project stage. It may require detailed planning to ensure the necessary metrics can continue to be managed in quick grids throughout the project.

Creating Quick Grids

Administrators and Process Designers with the Template Access role can create quick grids that Process Designers can add to deliverables and activities within a model. From there, deliverable and activity owners can enter and track information directly within a deliverable or activity in a project.

To create a quick grid:



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

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

2. Do one of the following:

   - **To add a new quick grid** - Click **Add New** in the upper right corner of the page.
   - **To edit an existing quick grid** - Click the name of the quick grid to open it for editing.
   - **To create a quick grid based on an existing quick grid** - Click in the **Copy** column to create a copy that can be used as a base to build a new quick grid.
     - The access groups of the copied quick grid depend on the access groups of the user and the access groups of the quick grid being copied.
     - If the user has edit permission to one or more of the access groups of the quick grid being copied, the result of that copy will have the access groups that both the user can edit and the quick grid is a member of.
     - If the user does not have edit permission for any access groups of the quick grid being copied, the new quick grid will have the highest access group for which the user has edit access.

3. *(Optional)* - Select the **Protected Quick Grid** check box to prevent grid designers from being able to open and modify the grid in Accolade when grid protection is turned on.

   The **Enable Quick Grids Protected Mode** parameter must be set at **1** and the check box for the appropriate quick grid must be selected for the quick grid to be protected. To edit a protected quick grid, Accolade Administrators must set the parameter back to **0**.

4. *(Optional)* - Select the **Create PDF** check box to generate a PDF of the quick grid contents associated to deliverables, activities, or layouts.

The quick grid automatically creates new, separate PDF versions every time a user modifies and saves the quick grid. PDF versions of quick grids associated to deliverables or activities automatically save as a deliverable or activity version. When a quick grid is embedded in a page layout pod and displays as a project page, the PDF version saves in the project's **Related Docs** page.

5. *(Optional)* - Select the **Publish PDF** check box to have PDFs of quick grids associated with deliverables, activities, and layouts published throughout Accolade. This check box is only available if you selected to create PDF versions above.

   Publishing the PDF versions of quick grids allows project team members to search for the PDF in Accolade. Unpublished versions do not display to users outside of the project to which the quick grid is associated. This check box might already be checked if the **Default to New Versions** system parameter is enabled. Deselecting the check box overrides the parameter setting for the grid.

   Important! If a quick grid is set to create and publish PDF versions and also contains secured metrics, the PDF versions display the metrics regardless of the security settings. That is, the generated PDFs do not respect metric security and can be viewed by users who may not have the user roles to view specific metrics. Do not select **Publish PDF** in the quick grid configuration if you want to ensure the security of certain metrics.

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6. Select the **Active** check box when the grid is ready to use in projects.

   Leave this check box clear until you have completed the design of the grid.

7. Complete the following information to identify and describe the grid:

   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 quick grid.
System Name	Enter a unique, shorter name that identifies the quick grid in queries, reporting views, Accolade Office Extensions, field codes, and other places in Accolade. The name must be unique among quick grids and can contain only letters (English alphabet), numbers, and the underscore.
Description	Enter a description of the purpose or nature of the quick grid. This description helps other users identify the grid throughout the system. Click and drag the lower left corner of the **Description** field to view text appropriately.
Category	Enter or select the category to which this quick grid belongs.

Field	Description
	Leave this field blank to add the quick grid to the **Default** category. Use categories to organize like grids together. For example, if there are a large number of grids assigned to add to a deliverable that collects financial analysis, a Process Designer can use a category selection to locate the finance grids when designing and creating models.
Configuration Access Groups	Select the access groups to which the quick grid belongs. Process Designers with matching permissions will be able to edit and view quick grid or the data within its grids. The access groups displayed are based on the current user's access group permissions and the access groups the quick grid belongs to.
Process Model Usage	Click the **Process Model Usage** button to see the list of process models that the quick grid is associated with. The list includes all process models the quick grid is included in, as well as links to the process model's component tree pages you have Edit access to.

8. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

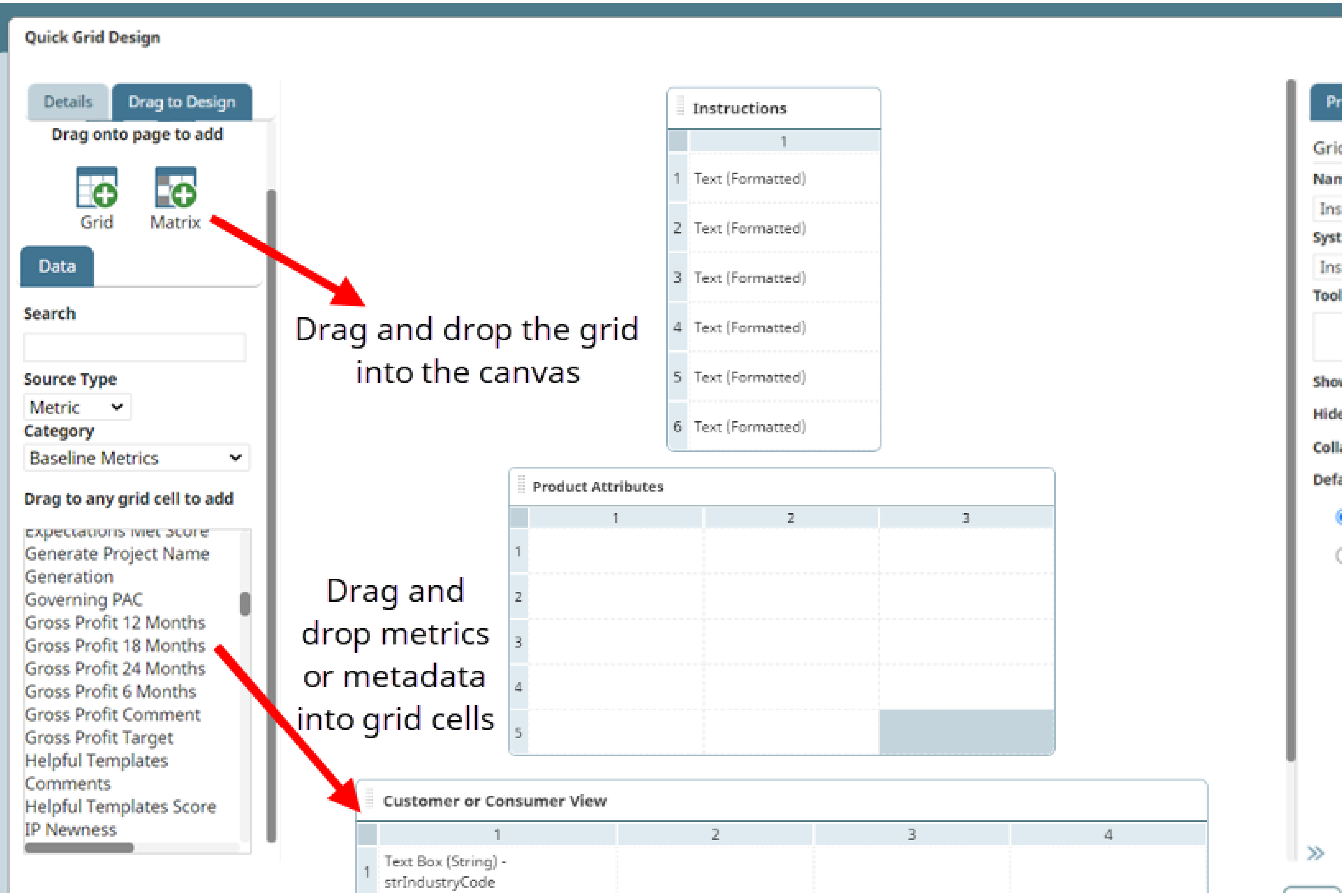
Notes:

- To delete a quick grid, click in the **Delete** column. The grid is removed from any process model and any deliverable or activity that uses the grid within a project.

Designing Standard Grids

Add and configure one or more grids that combined make up a quick grid when added to a deliverable or activity. Add multiple grids and matrix grids to a single quick grid. Standard grids are built on a cell-by-cell basis and do not reference a matrix.

To create a new quick grid or to copy an existing grid, see "Creating Quick Grids" on page 39.



To design a standard grid:

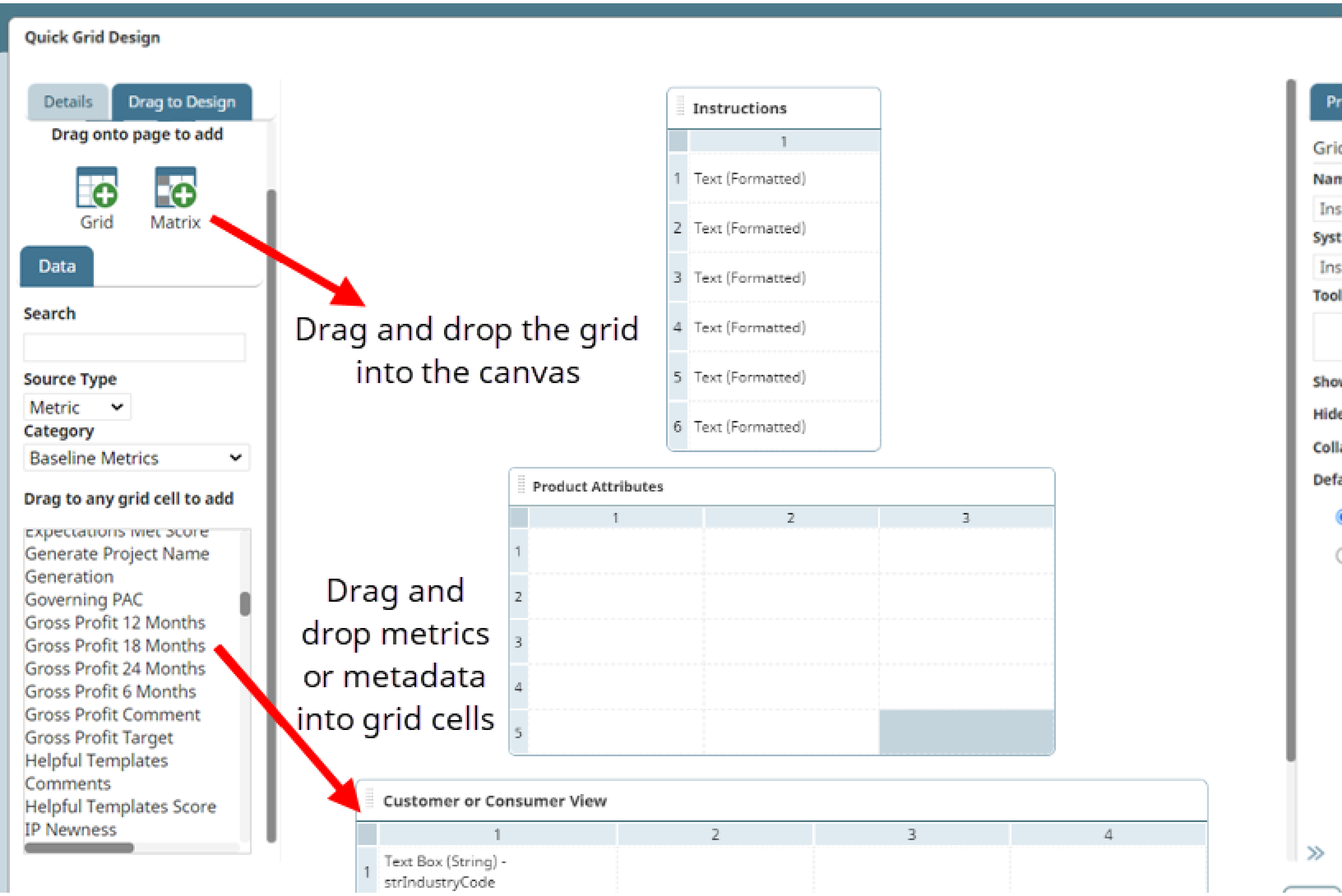
1. From the **System** menu, select **Page Design > Quick Grids**.
2. Create a new quick grid or open an existing quick grid.
3. Click the **Drag to Design** tab in the left panel of the Quick Grid Design dialog box.
4. Drag and drop **[Grid]**  in the canvas.
5. Complete all required fields in the pop up dialog to set the initial grid design:
   - **Name** - Enter the text that displays in the title bar when the quick grid displays in a deliverable or activity. The title should provide enough information so deliverable and activity owners can identify the grid.
   - **Rows** - Enter the initial number of rows in the grid
   - **Columns** - Enter the initial number of columns in the grid.

6. Click **OK** to set the initial grid design.
7. *(Optional)* Drag and drop additional quick grids from the **Drag to Design** tab onto the center canvas. Drag existing grids around the canvas to sort.
8. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

Designing Matrix Grids

Add a matrix grid in the quick grid design that contains some or all the columns of an existing matrix. Matrix grids contain only two or three rows (depending on whether you choose to add a totals row). Deliverable and activity owners can add additional rows to the grid, as necessary.

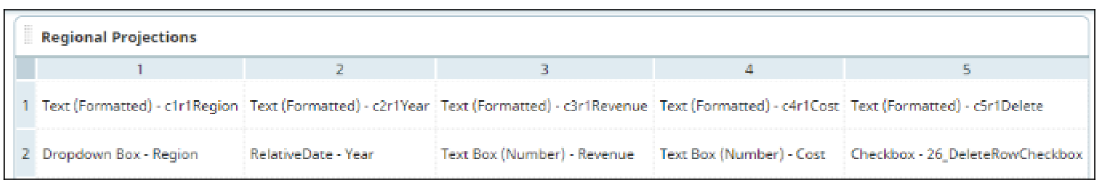
> The right-most column in a matrix grid is added automatically and contains a check box to allow deliverable and activity owners the option to delete a row. Do not modify the control in these cells. You can add a heading label and modify the shading of this column, as necessary.



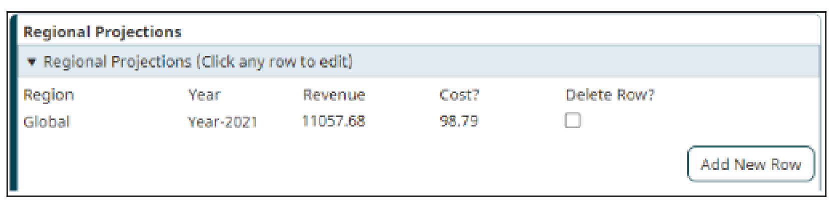
To design a matrix grid:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. Create a new quick grid or open an existing quick grid.
3. Click the **Drag to Design** tab in the left panel of the Quick Grid Design dialog box.
4. Drag and drop **[Matrix]** in the canvas.
5. Complete all required fields in the pop up dialog to set the initial matrix grid design:
   - **Name** - Enter the text that displays in the title bar when the quick grid displays in a deliverable or activity. The name should provide enough information so deliverable and activity owners can identify the grid.
   - **Category** - Select the data category that populates the matrix grid.
   - **Matrix** - Select the matrix this grid contains.
6. Click **OK** to set the initial matrix grid design.
7. *(Optional)* Drag and drop additional quick grids from the **Drag to Design** tab onto the center canvas. Drag existing grids around the canvas to sort.
8. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

Quick Grid Configuration (Matrix)



Rendered Quick Grid in a Deliverable or Layout



Changing Grid and Cell Display Properties in Quick Grids

Once you have created the quick grid and populated it with data, alter the grid and cell properties and appearance to help make them easier to navigate. For example, you may choose a bold font for a totals row in a matrix grid.

Changing Grid Settings and Properties

Altering the appearance and layout of a quick grid allows you control of data and information presentation. Quick grids are viewable in project deliverables and activities that various Accolade users have access to view and edit, based on specific user roles. The procedure below discusses options and functions for modifying a grid's structure and appearance.

To refine a grid structure, appearance, and functionality:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. Create a new quick grid or open an existing quick grid.
3. To add, delete, or move rows or columns click the number of the column or row header to select the row or column and click the appropriate icon in the field.

   - Add row above or below.

   - Move row up or down.

   - Delete grid row.

   - Add column left or right.

   - Move column left or right.

   - Delete grid column.

   Matrix grids do not allow row functionality, meaning you cannot add, delete, or move rows in a matrix grid. Additionally, merged cells disable row functionality.

4. *(Optional)* To move a grid on the canvas, do one of the following:

   - Click to the left of the grid header and drag it in the canvas.
   - Click the grid header to select the entire grid and click either or in the drop-down menu to move the grid.

5. Set the minimum or fixed height and width for grid rows and columns.

   Click the corresponding column or row number to select it and navigate to the **Appearance** tab in the right panel to modify. You cannot enable both minimum width and fixed width for grid columns.

Field	Description
Minimum Width	Enter the minimum width of the column in pixels. The grid column width adjusts according to the controls in the cells; however it displays with a width no less than the minimum set.
Fixed Width	Enter the width of the column in pixels to have the column display with a forced width, regardless of what populates the cells.
Minimum Height	Enter the minimum height of the row in pixels. The grid row adjusts according to the controls and data that populate the cells.
Fixed Height	Enter the height of the row in pixels to have the row display with a forced height, regardless of what populates the cells.

6. Change what displays in the structure of the grid as necessary.

   Click the grid header to select the grid and navigate to the **Properties** tab in the right panel to modify.

Field	Description
Name	Edit the grid name.
System Name	Edit the system name making it unique among quick grids and identifiable in queries, reporting views, and field codes. The name can contain only letters (English alphabet), numbers, and the underscore, and defaults to the grid name. On upgrade the system name defaults to "Grid" plus a number, making it unique throughout the system.
Tooltip	Enter a description of the grid or brief instructions for using the grid. The tooltip text is available for anyone interacting with the grid throughout the system.
Tooltip Alignment	Select the alignment of the tooltip icon within the cell.
Show Grid Title	Select whether the title displays on the grid in deliverables, activities, and layouts.
Show Footer Row	Select to add a row to the bottom of the matrix that can contain numeric totals and other buttons to perform actions within the grid.
Hide Grid	Select the check box to disable grids from displaying in deliverables, activities, and layouts.
Collapsible	Select the check box to allow deliverable and activity owners to collapse the grid, and select how the grid displays when a deliverable or activity is first displayed.
Default to Expand or Collapse	Select whether the grid displays as expanded or collapsed in deliverables, activities, and layouts.

7. Modify appearance aspects for the grid as necessary.

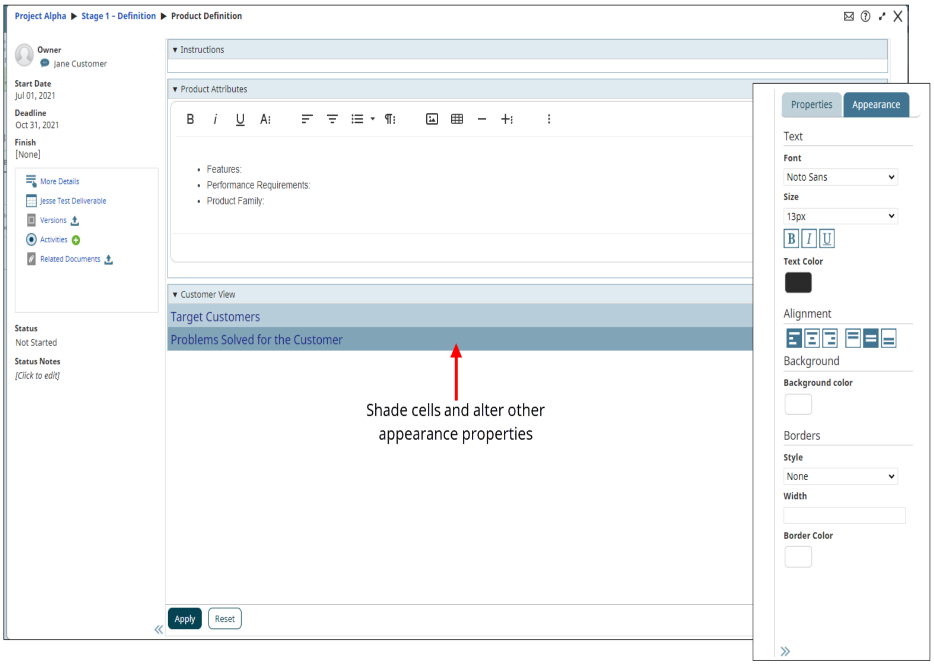
   To change grid background and border appearance, click the grid header to select the grid and navigate to the **Appearance** tab in the right panel to modify.

Field	Description
Background	Select a background color, enter its hexadecimal color code, or enter its RGB or HSV value in the **Background Color** field.
Borders	Select a border style in the **Style** field and enter a border width. Select a border color, enter its hexadecimal color code, or enter its RGB or HSV value in the **Border Color** field.

8. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

Changing Cell Settings and Properties

Altering the appearance and layout of quick grid cell allows you control of data and information presentation. Quick grids are viewable in project deliverables and activities that various Accolade users have access to view and edit, based on specific user roles. The procedure below discusses options and functions for modifying a grid cell's structure and appearance.



To refine a grid cell structure, appearance, and functionality:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. Click the name of the quick grid to open it for editing.

   Use **Tab** to navigate between cells in a grid.

3. To merge or split merged cells click the cells you want to alter and click the appropriate icon in the field.

    - Merge cells. You cannot merge cells in a matrix grid.

    - Split merged cells.

4. To alter the appearance of grid cells, select a single cell or multiple cells to edit at once and navigate to the **Appearance** tab in the right panel to modify any of the following:

Appearance Aspect	Description
Text	Select a text font such as Arial or Times New Roman in the **Font** field and a text size in the **Size** field. Choose to bold, italicize, or underline the text by selecting the appropriate icons. Select a text color, enter its hexadecimal color code, or enter its RGB or HSV value in the **Text Color** field. Cell text defaults to 13pt Noto Sans font. If a cell is editable, its text color is always black, regardless of the color set here. You can apply rich text elements to cells with formatted text controls and long string metric values by using markdown formatting.
Alignment	Click one or multiple alignment icons to position text within the cell. Cell text defaults left align and top align. - Left Align - Center Align - Right Align - Top Align - Middle Align - Bottom Align
Background	Select a background color, enter its hexadecimal color code, or enter its RGB or HSV value in the **Background Color** field. If a cell is editable and contains a control, the control's background is always white, while the cell background color displays as set here.
Borders	Select a border style in the **Style** field and enter a border width. Select a border color, enter its hexadecimal color code, or enter its RGB or HSV value in the **Border Color** field.

5. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

Notes:

- If the Control Type is set to **Rich Text**, the Text and Alignment sections are unavailable as users can customize the text directly from the rich text box.
- You cannot add matrix metrics to non-matrix grids and the number format for matrix metrics is not supported in Microsoft 365 applications.
- To delete a quick grid from the canvas, click the quick grid header and click in the drop-down menu.
- To delete cell contents, click the cell and click in the drop-down menu or click the cell and press **Delete**.
- The **Enable Quick Grids Protected Mode** parameter turns on and off grid protection. To modify a protected grid, an Administrator must set the parameter to **0**.

Adding Software Controls and Metrics to Quick Grids

Note: Users with the user roles listed to the right must also have the Template Access user role.

To create a new quick grid or to copy an existing grid, see "Creating Quick Grids" on page 39.

To add software controls and metrics to a quick grid:

1. From the **System** menu, select **Collaboration & Groups > Quick Grids**.
2. Click the name of the quick grid to open it for editing.
3. Click the **Drag to Design** tab in the left panel to display the data source options.
4. Indicate the data type to populate the grid cell by selecting either **Metric** or **Metadata** in the **Source Type** field.
5. If you selected **Metric** as the **Source Type**, select the appropriate metric category.

   Metrics appear in the list if the user has "Can Edit" access to the metric, the metric belongs to a child access group of the quick grid, or the metric is already attached to the quick grid.

6. To add metrics and metadata to the grid, do any of the following.

   - **Drag and Drop** - Drag a metric or metadata from the list in the left panel and drop it into a grid cell. A control defaults based on the metric and metadata type.

Data Type	Default Control
Metric	String: Text Input Number: Text Input Long String: Multi-line Text Input

Data Type	Default Control
	Multi-Select List: Paired List List: Drop Down Date: Date Selector
Metadata	Project Name: Text Input, Text Label, or Multi-line Text Input Project Description: Multi-line Text Box or Text Label Idea Submitter Name: Text Input, Text Label, or Multi-line Text Input Idea Submitter Email: Text Input, Text Label, or Multi-line Text Input Extended Project Data 1-10: Multi-line Text Box

- **Type Ahead** - Type metric and metadata field codes directly into the grid cell. A control defaults based on the metric or metadata. If the fast-entry input does not match a valid metadata or metric field code, the control defaults to formatted text.
- **Select a Control** - Select a control type in the **Properties** tab on the right panel from the **Type** field. Data type details populate and vary based on the selected control type.

7. Navigate to the **Properties** tab in the right panel and enter the following information to further define or modify the data or control in the selected cell. Only certain fields populate based on the control type selected.

   For all control types, you must enter a unique system name, up to 64 characters long, which identifies the cell across all grids in the Quick Grid editor.

   Additionally, you can change the control for the selected cell from the **Type** field which includes both the supported and unsupported controls associated with the metric or metadata selected.

   Note: Use custom number formats to specify how a number metric displays in an Accolade field code in quick grid cells. Custom number formats only display for Text Box (number) controls.

   For more information on control types and necessary properties, see the online Help.

   Note: Calculated metrics display as read-only within a quick grid. You cannot add matrix metrics to non-matrix grids and the number format for matrix metrics is not supported in Microsoft 365 applications.

8. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

To add a new metric while designing a new quick grid:

1. Click **New Metric** located at the bottom of the **Drag to Design** tab.
2. Fill in the necessary information to create a new metric.
3. Click **Create** to add the new metric to the system. The new metric displays in the list of metrics available to add to the grid.
4. Reference the table in Step 6 above to add the new metric to a quick grid.

5. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

Adding Quick Grids to Deliverables and Activities

After a quick grid is created, the final step to implementing the grid is to associate it to a deliverable or activity in a process model.

- You can associate multiple quick grids to a single deliverable or activity.
- You can associate the same quick grid to multiple deliverables or activities in multiple models.

To add a quick grid to a deliverable:

1. From the **Process** menu, select **Models**, and select the model to edit.
2. In the Model tree, select the deliverable or activity to modify.
3. In the **Quick Grids** field, click and choose one or more quick grids to display in the deliverable or activity information within the project.

   To clear a selected quick grid, click and click **Clear**.
4. To ensure that all data is entered in a deliverable or activity that uses the selected quick grids, select the **Disable Complete status when required data is missing** check box.

   When selected, the deliverable or activity cannot be set to **Complete** unless all the data fields set as required in the quick grid are completed.

   Quick grids are only editable during the current stage. To continue to manage the metrics within a grid in other stages, add the quick grid to deliverables or activities in that stage, or link the deliverable or activity to a prior stage.
5. Click **Apply** to save your changes.

Exercises - Creating Quick Grids

Try out what you have learned!

- Create a quick grid that contains two standard grids. Create one grid to include instructions, and one grid to include two columns, a heading row, and two additional rows.
- Shade the instructions grid blue.
- Add a third row to the second grid and a list box to one of the cells.
- If a test model exists in your system, add the quick grid to a deliverable in the model.

Restricting Configuration for Deliverables and Activities

Restrict who can view and edit deliverables and activities by assigning the deliverable or activity to one or more access groups. Process Designers with matching access group permissions set in their user profile will be able to view or edit the deliverable or activity.

Note: The access groups that display for selection are based on your access group permissions as defined in your user profile. Additionally, access group settings for the deliverable or activity must match the user permissions of other Process Designers in order to display for them.

Deliverables and activities inherit the access group visibility assigned for the model. All deliverables and activities on the model display regardless of their individual access group assignments.

To restrict deliverable and activity configuration:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
   - **To add a new deliverable** - In the Model tree, click next to the stage to add the deliverable to.
   - **To add a new activity** - In the Model tree, click next to the deliverable to which the activity applies.
   - **To edit an existing deliverable or activity** - Expand the stage or deliverable within the Model tree and select the deliverable or activity.
3. Select the access group(s) to which the deliverable or activity belongs.

   The access groups displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. Parent access group information is visible for access groups to which you have View permission.

   The deliverable/activity is selected to the highest level access group listed by default. Note that the deliverable/activity is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

   Process Designers with matching access group permissions will be able to navigate to and edit the deliverable and activity, depending on their individual access group permissions.
4. Click **Apply** to save your changes.

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