Sopheon Accolade®

Process and Project Management - Managing Projects Training Guide

Version: 16.0

About Sopheon Accolade®

Document Name:	Process and Project Management - Managing Projects Training Guide
Document Version:	1
Software Version:	Sopheon Accolade 16.0
Document Date:	August 2023

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About the Accolade Education Program

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

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

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

The Accolade documentation suite contains the following additional components:

Document	Contents
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.

Document	Contents
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.
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

- Project Manager
- Process Manager*

Terms and Concepts

- Accolade Navigation

Related Training Modules

- Getting Started with Accolade
- Understanding Projects
- Assigning Project Teams

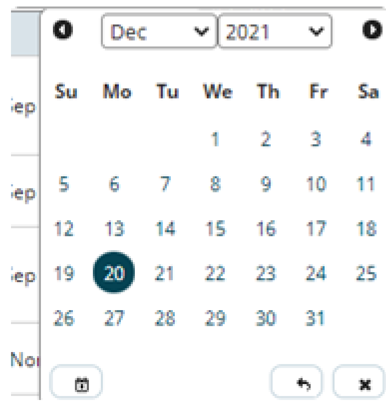
*If a Project Manager is not assigned to a project, a Process Manager with the appropriate rights can complete most tasks.

Setting Project Dates

Projects contain several dates to help keep the project on track to its launch. Your role and rights within the project determine if you can set or change dates throughout the project, as described in the sections below. Each type of date can be set from respective pages in a project, or directly in the process graphic displayed within a project.

> If you have **Allow Updates Through My Work** rights, click in the My Work page to download the contents of the page to a spreadsheet file to update the dates in multiple projects at once.

Project Start and End Dates

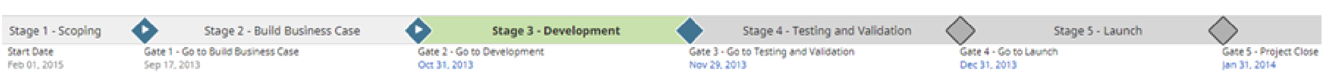


Each project has a start date when the project began or is scheduled to begin, and an end date when the project is projected to end or has ended for completed projects. Selections in the model determine where project start and end dates are available and where they are required within projects. Possible locations include on project creation or migration, the **Home** and **Details** pages, and within the process graphic displayed within a project.

Stage and Gate Dates

For gated projects, after the project start and end dates are defined, the start and end dates of the stages are set based on the gate dates for each gate. The first stage lasts from the project's start date to the first gate date. The second stage is from the first gate to the second gate date, and so on.

Note: The **Set gates page to read-only** setting in the process model determines if the content on the Gate page and the gate dates in the process graphic can be edited.



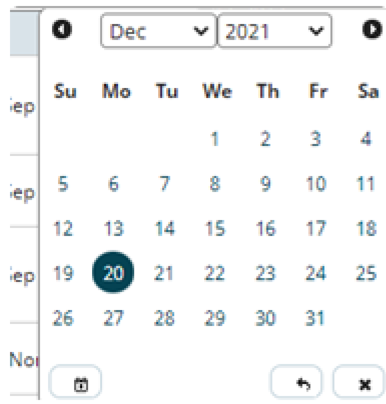
Gate dates are also set automatically in the following circumstances:

- When workflows assigned to a deliverable are completed. The workflow must have an automated step to set the gate date upon workflow completion.
- When the model for the project uses a metric to set the gate date. These dates can be overridden at the project level. Additionally, if gate decisions have pushed a project into a previous stage the gate date metric value cannot calculate the gate date. Gate dates that have been manually overwritten or do not match the value of the associated gate date metric display with next to the date in the process graphic to indicate the date was manually updated or does not match the metric. To recalculate a gate date, click **Recalculate** next to date in the **Meeting Date** field on the **Gates** page.

If the **Allow Project Owners to Set Gate Dates** parameter is set to **1**, project owners including Project Managers and Process Managers (if no Project Manager is assigned) can set gate dates for gates with the status Pending Decision and Recycle.

Setting Deliverable and Activity Dates in Projects

Projects contain several dates to help keep the project on track to its launch. Your role and rights within the project determine if you can set or change dates throughout the project, as described in the sections below. Each type of date can be set from respective pages in a project, or directly in the process graphic displayed within a project.



After the stage durations are defined, the deliverable and activity start, finish, and deadline dates are defined to fall within a stage's time period. If the you are using Accolade's integration with Microsoft Project, deliverables and activities also include a finish date that updates when a project plan is updated and loaded to Accolade.

Deliverables and activities dates can have a manually set start and end date, or one that is relative to the next gate date in terms of days or percentage of stage completion.

Using the **Days before stage end**, **Days after start**, or **Percent of stage duration** allows the dates to shift depending on stage start and end dates for the project, without having to manually re-enter new dates. If dates are manually updated in the project, the defaults specified in the process model will no longer be followed.

Set deliverable and activity dates in the **Stages** page within a project, or in the deliverable or activity details. The availability of the date fields within the Deliverable/Activity Details is dependent on your configuration.

Requesting Resources for Projects

Resource requests, also called resource demands, are part of the resource planning and allocation process. Project Managers and Process Managers with Manage Process rights can make requests for the resources required for a project, either by stage or across an entire project. Project Managers can request a general resource, for example, a chemist or a quality assurance expert, or can request that specific Accolade user be part of the project. Make requests in your company's chosen unit of measure for resources within a pool, for example, full time employee (FTE).

After a request for a resource is made, Resource Demand Planners, who are tasked with managing how resources are allocated across projects, assign resources to meet the requests, balancing the resource availability, both individually and pool-wide, against the demand on them from projects.

Project Managers can do the following:

- Request resources for a single project from within the project Resources page.
- Request resources for one or more projects using the Resource Requests page.
- Request resources using a document based on a Resource Plan template.

Request Resources from Within a Project

Project Managers can request resources for a project from within the project's Resources page. Users with access to the project can also use the Resources page to review the resource requests and allocations currently assigned to the project. Resources requested through the project pages are also available for review and modification within Resource Editor.

To request a resource from within a project:

1. Display a project and select the **Resources** page.
2. Do one of the following:
   - **To view a resource for a project stage** - In the **Plan For** field, select the specific stage.
   - **To view a resource for the entire project** - In the **Plan For** field, select **Project**.

   Pools with existing requested or assigned resources display. Click to expand the display and view the requested or assigned resources.

   On the project's Resources page, click the or icon next to a pool name to view the demand history of the resources in that pool. indicates that the Project Manager made the most recent change to requests for the pool. indicates that a Resource Demand Planner made the last change in the pool. Click **Mark the Pool as OK** to clear the notification, so any subsequent indicates a new change to resources for the project from the Resource Demand Planner.
3. In the **Pool** field, select the resource pool from which you want to request resources.

   You can request resources from any resource pool.
4. In the **Resource Availability** section, select the check boxes next to the resources you want to request.

   The **Resource Availability** section displays the resources within the pool, and the availability for each time period. If a resource displays a negative availability number, that resource is over allocated for that time period.

   Select general resources, such as Any Chemist or Any Quality Assurance Engineer, if you do not require a specific person but require specific expertise.

5. Click **Add to Resource Plan**.
6. Repeat steps 2-5 as necessary to add additional resource requests for your project.
7. For each resource in the **Resource Plan** section, enter the required demand for each time period for the project.
   - **To edit a single value** - Click a yellow shaded cell in a time period column and enter a value.
   - **To copy a value to multiple periods** - If the same value applies to multiple periods across the row, click in the cell and click or press **Shift +**. Enter the number of consecutive periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.
   - **To copy and paste a pattern of values from a spreadsheet** - Highlight the cells to be copied in your spreadsheet and press **CTRL+C**. Click into the project Resources page in Accolade, then click and drag to highlight the destination cells and press **CTRL+V** to insert the copied values.

     Note: In the project's Resources page, multiple cells can be copied from a spreadsheet and pasted into Accolade. In order to paste in correctly, the number of cells copied from the spreadsheet must match the number of highlighted destination cells in Accolade.

   You can request a partial demand, such as 0.50 full time employees (FTE).
8. Click **Apply** to save your changes.

Request Resources Using Resource Requests

Project Managers can request resources for projects that they manage using the Resources Requests page, which provides a means to request resources for multiple projects at a time.

To request resources for one or more projects using the Resource Requests page:

1. From the **Workspace** menu, select **Resource Requests**.
2. Display projects or demands and apply filters as necessary.

   Use the or options to expand or collapse a row or grouping. To expand or collapse all rows or groups displayed, use the and option in the table header.

   On the Resource Requests page, the or icon next to the resource indicates the fulfillment status for the resource. indicates that the demand request is fulfilled. indicates that the demand request is not or is only partially fulfilled.
3. Click next to the project name for which you want to request a resource.
4. In the Add New Demands dialog box, select the resource(s) to request for the project in the **Available Resources** list, and the project to which to assign them in the **Available Projects** list.

To view only the resources or projects that currently have no demands, select the **Restrict to No Demands** check box.

To assign the selected resource(s) to multiple projects, select multiple projects in the **Available Projects** list. The project you clicked in is selected by default.

5. *(Optional)* To request duplicate resources for a resource/project combination, select the **Allow Duplicate Demands** check box.

   Leave this check box clear if you want to request demands for only the resource and project combinations that currently do not have demands allocated to them.

6. Click **OK** to display the requested resources in Resource Requests.
7. Repeat steps 2-6 as necessary to add additional resource requests for your projects.

   Once all resource requests are completed, use the icons and color shading on the page to help identify what requires your attention.

   - New requests display with and resource names or project names in bold (depending on how you are viewing information in Resource Requests).
   - Light blue shaded **Project** rows - Indicates requested demands.
   - Light green shaded **Project** rows - Indicates assigned demands.
   - Yellow shaded cells - In general, indicates areas of the page that you can edit, for example, the **Multiplier** cell. In addition, yellow shaded cells in **Project** rows indicate time periods that are within the project's timeline.
   - Light gray shaded cells - In **Project** rows, indicates time periods that are outside of the project's timeline. Gray shaded cells can be edited, but will not recalculate project dates based on resource changes.

   Important! A project's timeline is defined by its start and end dates. If these dates are not defined, Accolade uses the first and/or last defined project gate dates to apply shading. If only one project date is defined, or the project does not have any dates defined, all time period cells will be shaded gray to indicate that the project's timeline is undefined.

   - White cells - Indicates cells that are view-only.

8. For each resource, enter the required demand for each time period for the project.
   - **To apply a demand curve** - Select the demand curve to be applied. This will automatically set the **Effective Period** to the current time period and will adjust the resource request's demand.
   - **To modify current and future demand curve resource values** - Enter a value in the **Multiplier** column that is larger or smaller than 1.00. The multiplier is applied to all values except those before the effective period.
   - **To edit a single value** - Click a yellow shaded cell in a time period column and enter a value.
   - **To copy a value to multiple periods** - If the same value applies to multiple periods across the row, click in the cell and click or press **Shift +**. Enter the number of consecutive

periods to copy the value to, and click **OK**. The value is copied to those periods, even if they are beyond the viewable area of the screen.

- **To copy a pattern of values to a different range of cells in Accolade** - Click and drag to select a range of cells containing values, press **CTRL+C**, then click and drag to select a different range of cells and press **CTRL+V**.
- **To copy and paste a pattern of values from a spreadsheet** - Highlight the cell to be copied in your spreadsheet and press **CTRL+C**. Click into the Resource Requests page in Accolade, then click to highlight the destination cell and press **CTRL+V** to insert the copied value.

  Note: From the Resource Requests page, only one cell at a time can be copied from the spreadsheet and pasted into Accolade.

To enter comments about your requests, click in the row and enter any information regarding your requests or modifications. Note that if Portfolio Optimizer is used to manage resources, comments are removed when resources are committed from Portfolio Optimizer back to Accolade.

9. Click **Apply** to save your changes.

Notes:

- To delete a request in the project Resources page, select the line in the **Resource Plan** section and click **Delete Entry**.
- To delete a request in Resource Requests, click next to the requested resource under a project. Deleting a demand row deletes all demand assigned within that row, even if it is not visible in the displayed time period. The row is removed when you click **Apply**. Click **Reset** to undo the deletion prior to applying changes.
- When a project becomes inactive (through Close, Hold, or Kill actions), resources for the current and previous time periods will display as read-only on the project's Resources page, and future requested and assigned demands will not display on any resource page. If a project becomes active again, the requested and assigned demand values will display from the current time period forward.
- The length of a time period within Resource Requests (weeks, months, quarters, or years) is defined in the Administration Console when Accolade is installed.

Requesting Resources Using Deliverables and Activities

Document owners can manage a project's resource plan using a deliverable or activity available in the project that is based on a Resource Plan template.

This topic describes the use of the simplest version of a resource plan template; however, Sopheon may have created a customized version of this template for use at your company. For detailed information about using a customized template, contact your Accolade administrator.

The most efficient way to use the basic resource plan template is for the Project Manager to add all the resources to the plan on the project's **Resources** page or through Resource Editor. Then, when the Document Owner downloads the document, the resources are already listed.

To request resources using a deliverable or activity:

1. Display the project and click the **Stages** page to display all deliverables and activities in the stage.
2. Identify the deliverable or activity that contains the resource plan and click to view all files available for download. Click to download the template and click if there is an existing version of the resource plan to modify.
3. If prompted, select the **Project Resource Plan** option to refresh resource data in the document.
4. In the **Date Range** field, select an item to refresh either the entire resource plan, future demands, or a specific date range of demands.
5. In the **From** and **To** lists, select dates in the enabled lists.
6. Click **Refresh** to overwrite the document with current data for the project

   Click **Do Not Refresh** to continue working with the data that was last saved in the document.
7. Enter amounts in the time period columns of the plan and do one of the following to save a published or unpublished version of the document to the project:
   - If you are using the Accolade Office Extensions add-in, save a version of the file back to Accolade using the **Save to Accolade** option in the application's menu.
   - Save a document version from within Accolade.

Add a Resource to the Plan

If you need to add a resource that the Project Manager has not yet added to the project, you can do so manually, but you must make sure that all the data (resource pool name, whether the pool is active, unit of measure, etc.) is correct. Enter a unique value in the **Custom Demand ID** column, but leave the **Demand ID** column empty.

Updating Project Status and Details

As a project progresses, details about the project may change and require updates and team members may need to enter project status notes. A project's status and its current metric settings are available at a glance through quick access pages such as My Work and Upcoming Gates.

> If you have **Allow Updates Through My Work** rights, click in the My Work page to download the contents of the page to a spreadsheet file to update the dates in multiple projects at once.

Project Status

You can write a brief message that describes the current situation of the project and enter metric values that describe the project's status.

To update a project's status from a project-specific page:

1. Display the project and identify the page that contains the project status entry area.

   Note: Depending on your system's configuration, this page may be the **Project Home** page.

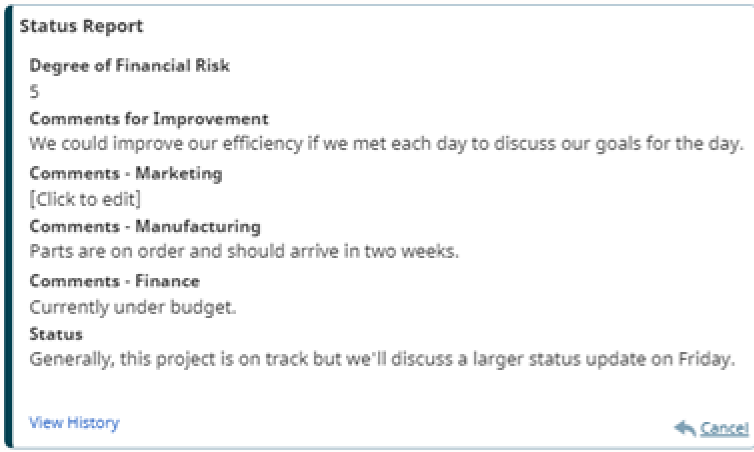
2. Click in the Project Status pod and enter the project status information in the fields provided.

   To change a status report, create a new one with the corrected information.

   Note: If the **Allow Last Status Report to be Deleted** system parameter is enabled, click in the Project Status pod to delete the last posted status report. Only the last status report can be deleted, and must be deleted by the user who entered it.

3. Click **Apply** to save your changes.

   Depending on the model, metrics may either be entered or displayed (read-only) as part of the status report. All metadata values and metric calculations associated with the model and project calculate and display in the project status report and in the project history. However, calculations in project history may display as calculated one status report behind.



Project Details

As a project progresses, details about the project may change and require updates.

To update project details from any project page:

1. Display the project.
2. Click in the upper right corner of the page and select **Edit** to update project details, such as the project name, visibility and security, exclusions, and if a Project Manager can manage the team.
3. Click **Apply** to save your changes.

To update a project's details from a project-specific page:

1. Display the project and identify the page that contains the project status entry area.

   Note: Depending on your system's configuration, this page may be the **Project Home** page.

2. In the Project Details pod, update the project's details, as necessary.
3. Click **Apply** to save your changes.

Updating Multiple Projects at Once

As a Project Manager, Idea Manager, or Project Team Member, you likely participate in or manage several projects at once, each requiring timely updates. If you have **Allow Updates from the My Work page** rights, you can download project information to a spreadsheet file, make changes to the project information in the file, and upload the changes to make updates to multiple projects without having to navigate to each individual project.

The following information can be updated using the spreadsheet:

- Project name and description.
- Project gate dates.
- Select project metrics. All metrics that are set to allow updates from My Work are included in the downloaded file. If a metric is not set for updates from My Work, the metric is excluded from the download.

To update multiple projects at once:

1. From the **Workspace** menu, select **My Work**.
2. Ensure the Work pod is set to display projects.
3. Click to download information for the displayed projects to a spreadsheet file.

   By default, Accolade saves the file to a temporary internet files directory. Save the file to a more accessible location.
4. Update the contents as necessary, ensuring the data within the spreadsheet meets the requirements listed below.
5. From the Work pod, click .
6. Click **Load File**, select the file to upload, and click **Upload File**.

   Accolade uploads the changes from the spreadsheet file, and updates the data within each project accordingly.

Columns Included in the Spreadsheet File

- My Projects

Column Name	Accepted Values on Upload	Additional Notes
Sys Project ID	Alphanumeric characters	Used for matching for upload. If a project exists, its settings are changed with the values in the uploaded file. Do not change these values.
Project Name	Alphanumeric characters, underscore**	If blank, the row does not upload.
Project Description	Any	Can be blank.
Gate Date*	Any date	Can be blank.
Gate # Change Reason*	Any valid event reason code	Can be blank.
<Metric Display Name>	Alphanumeric characters	A metric column is included for each metric that includes the **Allow Updates from My Work page** option in the metric configuration. Values must be appropriate for the metric type. It is possible that the file contains metrics that are not part of your projects. Any updates to metrics not included in the project are not applied when uploaded. Additionally, if a metric is not set to allow updates from my work but is included in the upload file, no rows within the file are uploaded.
End Date	Any date	Can be blank.

* A **Gate Date #** and **Gate # Reason** column is included for each gate included in the projects contained in the download. If you manage projects that use different process models, it is possible that a gate column does not apply to some of the projects included in the downloaded file.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Notes:

- The colors defined in the **Excel Header Background Color**, **Excel Header Font Color**, and **Excel Header Is Bold** system parameters determine the formatting of the header rows within the spreadsheet file.
- The steps in this article cover using the Work pod on the **My Work** page to view

this information. Depending on your company's configuration, you may not have access to this menu or it may be renamed. The Work pod is also available on the **Comprehensive** and **Focused** home page layouts, and on the **Upcoming Gates** page. For more information, see Viewing Your Work.

Exercises - Update Multiple Projects

Try out what you have learned!

- Download your projects into a spreadsheet file.
- Make updates and ensure columns are in the correct order.
- Upload the file back to Accolade.

Assigning Document Owners

Ownership of project documents determines a team member's rights to upload and publish new versions. Ownership of a deliverable or activity can be either explicit (an owner is specifically assigned) or implicit (ownership is inherited when an explicit owner is not assigned) and can be assigned in the following ways:

- **Automatically through Function assignment** - users assigned to a function on the project team are automatically assigned to every document, gate, or workflow action in current or future stages, where the combination of function and owner matches the function/owner project team assignment.

  For example, selecting the first user for the function Purchasing Agent in the **Project Team** section of the **Team** page assigns that user to every document whose function is set to Purchasing Agent that currently does not have an owner assigned. Similarly, replacing user Jane Doe with user Jane Smith as the user assigned to the Purchasing Agent function assigns that user to every document that has Jane Doe set as the owner and Purchasing Agent set as the function.

  However, if the combination of function and owner is not the same on the document, gate, or workflow action as assigned for the function on the project team, changing the user on the **Team** page does not change the owner on the object.

- **Manually through individual document assignment** - the project's assigned project manager and Process Managers with Manage Process rights can assign individual deliverables and activities to different owners, overriding the automatic assignment that comes from the function assignment.

  If collaborative deliverables are enabled, team members can assign themselves as the owner of an unowned deliverable or activity that has been set to allow shared ownership and can collaborate with one another in completing the activities for the deliverable.

- **Through implicit ownership** - if a deliverable or activity does not have an owner as defined above, it always has an implicit owner. Implicit ownership is intended to ensure that deliverables and activities always have an owner, and so a team leader does not have to assign themselves as an owner to change an unowned document.

Implicit ownership applies when a user is not specifically assigned as the owner and is determined as follows:

- If an activity has no owner, the Deliverable Owner owns the activity.
- If a deliverable has no assigned owner, the Project Manager owns the deliverable and can add new versions of deliverables in their project that do not have an assigned owner.
- If a project has no assigned Project Manager, the Process Manager (or Idea Manager for Idea projects) with Manage Process rights within the project's access group, has project manager rights to the project. Therefore, the Process Manager owns the deliverable. As soon as a project has an assigned Project Manager, the Process Manager no longer has implicit rights.

To view a list of all the assignments for a team member in a project, click the **Team** page. Click next to the team member's name to view their assignment, gatekeeper, and workflow action details.

To manually assign an owner to a project document:

1. Display the project in which you want to assign a document owner.
2. Click the **Stage** in the model graphic to display the project stage that contains the deliverable.

   If you are assigning an owner to an activity, expand the deliverable to display its activities.
3. In the **Owner** column for the deliverable or activity, select a member of the project team.

   Depending on how the deliverable or activity is configured in the model, ownership of a deliverable or activity may be restricted to users with a specific user role or to users assigned the function set for the deliverable or activity.
4. Click **Apply** to save your changes.

You can also set a deliverable or activity owner from the deliverable or activity details.

Collaborative Document Ownership

If the document is set as collaborative, team members can assign and unassign themselves as the owner. This allows different team members to work on the same deliverable or activity in turn.

You can assign owners to a collaborative deliverable just as with non-collaborative deliverables. The difference is that owners can unassign themselves and allow other team members to become the owner.

To enable collaboration on a document:

1. Display the project in which you want to assign a document owner.
2. Click **Stage** in the model graphic to display the project stage that contains the deliverable.

   If you are assigning an owner to an activity, expand the deliverable to display its activities.
3. Click the deliverable or activity name that you want to make collaborative.
4. In the Contents tree, click **More Details** to display additional details about the deliverable or activity.
5. Select the **Allow shared ownership** check box.
6. Click **Apply** to save your changes.

Notes:

- If a document contains a report created with Accolade Office Extensions, do not assign a Restricted Team Member as the owner. That user role does not have rights to refresh this kind of report in the document.
- If a user is deleted or deactivated in Accolade, they are removed from the project team; however, they remain listed as the owner of any the documents in the project. For reporting and record keeping purposes, deleted or deactivated users remain as the recorded owner for documents that have a **Completed** status.

Adding a Predecessor to a Deliverable or Activity

Deliverables and activities that have a dependency to another deliverable or activity can be assigned as a predecessor. Predecessors create a link between two deliverables to show that one is dependent on the other and should be completed prior to the deliverable being considered complete.

Project Managers can establish predecessors for deliverables. Before predecessors can be established, all deliverables and activities must be created. Predecessors can be assigned to deliverables within the same project only.

To create a predecessor for deliverables or activities:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.
2. Click the deliverable or activity name you want to assign a predecessor to.
3. From the Contents tree, click **More Details**.

   The **Predecessor** field may also be available in the Summary pane.

4. Click **Predecessor** to display the available deliverables.
5. Select the deliverable to assign as a predecessor.

   Deliverables are grouped by each stage of the project and are in order based upon when each stage is completed within the project. Activities are displayed under the parent deliverable.
6. Click **Apply** to save your changes.

   Predecessors can also be established from the Stages page. To add a predecessor, click in the **Predecessor** field and select a deliverable or activity from the available list. Click **Apply** to save your changes.

To view a predecessor:

1. Display the project and select the **Stages** page to display all deliverables and activities in the stage.
2. Do one of the following to view predecessor information:
   - **To display from a project stage** - Click and select **Predecessor** to add this column to the table.

     To ensure predecessor is always displayed, click to save your current view.
   - **To display from Deliverable Details** - Select the deliverable and from the Contents tree click **More Details**.
   - **To display predecessors for activities** - Select the parent deliverable and from the Contents tree click **Activities**.

Notes:

- To remove a predecessor from a deliverable, select **None** from the available predecessor list. Click **Apply** to save your changes.
- Deliverables and activities with assigned conditions may not display as available predecessors.
- The availability of the **Predecessor** field within the Deliverable/Activity Details is dependent on your Accolade configuration.

Adding and Publishing Document Versions

Documents in Accolade can contain one or more versions, either published so members outside the project team can view them, or unpublished so they are only accessible to members of the project team.

Important! Publishing older versions of a document that was included in a project migration or copy, or uploading a document that was downloaded from a source project into a new project, can update metrics in projects related to the source project, not the newly created migrated project. After a project is migrated, document owners should download the template or the latest version from the new project, refresh the data and update the project system ID references as necessary, and upload the document to the new project.

Upload versions of the following document types:

- Deliverables and activities.
- Related documents attached at the project level.
- Gate documents.

Use the Accolade Office Extensions add-in to save versions of deliverables, activities, gate documents, and related documents directly to Accolade from the application. See the online Help available in the Accolade Office Extensions add-in.

To add a deliverable or activity version from within Accolade:

Note: or if the deliverable is set to Completed. You cannot add a new version of a deliverable while it is in a workflow, if the stage is locked, or if the deliverable is set to **Completed**. See the online Help for information about stage locking.

1. Display the project and select the **Stages** page.
2. Click the document name to display its details.
3. In the Contents tree, click **Versions** to display its version information.
4. Select how to create the document version.

Source Type	Description
Add New	Select this option to upload the file and save it to Accolade. To base a new version on a template or a previous version, first download the template or version, make modifications, and then add the new version to Accolade. Click and drag files from your computer to the Versions pane to upload files without clicking **Add New** and selecting files.
Add Link	Select this option to link to an external file on the network or to a website. Enter the directory path to the file or the URL to the website. When linking to a file, the file itself is not saved in the Accolade database. Therefore, if the file on the network is moved or renamed, the link to the file breaks. To copy the directory path from Windows Explorer,

Source Type	Description
	hold **Shift** and right-click the file name, select **Copy as Path**. Paste the path into the **Add Link** field and delete the quotes from the pasted text. Do not enter a path to a file on your local computer or to a network location using a mapped drive. Other users may not have access to your computer or may have mapped the same drive to a different location. A correctly formatted file path uses the format \\machine name\directory name\...\file name. Beginning the file path with a drive letter creates an incorrect format. Ensure the path is correctly formatted.

5. *(Optional)* Update the version details.
   - Select the **Published** check box to make the version of the document viewable to users outside the project team and available to Quick Search and Advanced Search.

     Unpublished versions are available only to members of the project team and are not included in search results. Only one published version of document can exist at one time. If you choose to publish this version, any existing published versions become unpublished.

     Depending on a system or model configuration, deliverable and activity versions may publish automatically on upload.
   - Enter the name of the person that created this document in the **Author** field.
   - In the **Comments** section, enter any comments regarding the versions, such as what has changed.
6. Click **Apply** to save your changes.

   Clicking **Apply** saves the publish and comments information. However, if you exit without clicking **Apply**, the uploaded version is still saved with the deliverable or activity.

To upload a project-level related document version from within Accolade:

1. Display the project and click the **Related Docs** page.
2. Click the document name to display its details.
3. Select how to create the document version.

Source Type	Description
Add New	Select this option to upload the file to Accolade. Click and drag files from your computer to Versions page to upload files without clicking **Add New** and selecting files.

Source Type	Description
Add Link	Select this option to link to an external file on the network. The file itself is not saved in the Accolade database. Therefore, if the file on the network is moved or renamed, the link to the file breaks. To copy the directory path from Windows Explorer, hold **Shift** and right-click the file name, select **Copy as Path**. Paste the path into the **Add Link** field and delete the quotes from the pasted text. Do not enter a path to a file on your local computer or to a network location using a mapped drive. Other users may not have access to your computer or may have mapped the same drive to a different location. A correctly formatted file path uses the format \\machine name\directory name\...\file name. Beginning the file path with a drive letter creates an incorrect format. Ensure the path is correctly formatted.

4. *(Optional)* Update the version details.
   - Select the **Published** check box to make the version of the document viewable to users outside the project team and available to Quick Search and Advanced Search.

     Unpublished versions are available only to members of the project team and are not included in search results. Only one published version of document can exist at one time. If you choose to publish this version, any existing published versions become unpublished.

     Depending on a system or model configuration, deliverable and activity versions may publish automatically on upload.
   - Enter the name of the person that created this document in the **Author** field.
   - In the **Comments** section, enter any comments regarding the versions, such as what has changed.
5. Click **Apply** to save your changes.

   Clicking **Apply** saves the publish and comments information. However, if you exit without clicking **Apply**, the uploaded version is still saved as a related document.

To upload a gate document from a project-specific page within Accolade:

1. Display the project and select the **Gates** page.
2. Click the gate document name to display its details.
3. Select how to create the document version.

Source Type	Description
Add New	Select this option to upload the file to Accolade.

Source Type	Description
	Click and drag files from your computer to Versions page to upload files without clicking **Add New** and selecting files.
Add Link	Select this option to link to an external file on the network. Enter the directory path to the file. The file itself is not saved in the Accolade database. Therefore, if the file on the network is moved or renamed, the link to the file breaks. To copy the directory path from Windows Explorer, hold **Shift** and right-click the file name, select **Copy as Path**. Paste the path into the **Add Link** field and delete the quotes from the pasted text. Do not enter a path to a file on your local computer or to a network location using a mapped drive. Other users may not have access to your computer or may have mapped the same drive to a different location. A correctly formatted file path uses the format \\machine name\directory name\...\file name. Beginning the file path with a drive letter creates an incorrect format. Ensure the path is correctly formatted.

4. *(Optional)* Update the version details.
   - Select the **Published** check box to make the version of the document viewable to users outside the project team and available to Quick Search and Advanced Search.

     Unpublished versions are available only to members of the project team and are not included in search results. Only one published version of document can exist at one time. If you choose to publish this version, any existing published versions become unpublished.

     Depending on a system or model configuration, deliverable and activity versions may publish automatically on upload.
   - Enter the name of the person that created this document in the **Author** field.
   - In the **Comments** section, enter any comments regarding the versions, such as what has changed.
5. Click **Apply** to save your changes.

   Clicking **Apply** saves the publish and comments information. However, if you exit without clicking **Apply**, the uploaded version is still saved as a gate document.

Notes:

- To delete a document version, click the document name to display the document details. Select the check box in the column. Click **Delete** or **Apply**. The document must be set in the process model to allow deletions of versions.

- If the **Disable Link to File** and **Disable Link to Website** system parameters are enabled, you cannot link to a file or website, respectively.
- To unpublish a document version, click the document name to display the document details. Clear the **Publish** check box and click **Apply**.
- If the deliverable is a Microsoft Project plan, the plan must be published using the **Save to Accolade** feature from within Microsoft Project in order to update dates and assignments.
- Accolade uses a blocklist to prevent the upload of listed file extensions as a security measure. This blocklist, stored in the SQL table ACC_ DomainExtensionsProhibitedForUpload, specifies .exe files by default. To have additional extensions added to this file, contact Sopheon Customer Support.

Criteria for Successful Project Migration

The characteristics of the source and the target model in a project migration map drives how successful a migration of a project is between the two models.

The following items are always migrated with a project, regardless of the source and target models:

- Project status messages
- Related documents and related document categories

  The related documents of deliverables and activities that are mapped keep their relationship with the mapped document. Related documents of deliverables and activities that are not mapped are migrated to related documents of the project, without a relationship to a deliverable or activity.
- Project discussions
- Deliverable discussions for mapped deliverables
- Start and end dates

The following items do not migrate, regardless of the source and target models:

- Stages
- Resource requests and allocations
- Microsoft Project plans and templates
- Quick grids

The items in the table below are migrated if they meet the listed requirements:

Project Component	Requirements for Migration
Gates	• Same relative position in the model (first gate, second gate, etc.). • Same name. • Same number of gatekeepers with matching gatekeeper functional areas.
Gate Documents	• Same name.

Project Component	Requirements for Migration
	• Located in gates with the same names. Only the latest version is migrated.
Deliverables	• Same name. Consider the following additional rules: • A target deliverable can map to at most one source deliverable. Deliverables are processed in the source and target models stage by stage, starting with the stage the source deliverable is in. The process continues with each following stage, looping back to the beginning of the model until it finds the first match to a target deliverable. • A file-based deliverable (with content) that does not map to a deliverable in the target model using the above rule, migrates to a related document in the target project. • A deliverable that includes an online form that does not map to a deliverable in the target model using the above rules, does not migrate to the target project. Only the latest version is migrated.
Activities	• Same name. • The activity's deliverable has been mapped to a deliverable in the target model. Only the latest version is migrated.
Workflow History	The associated deliverable or activity must successfully migrate.
Metric Values	• Same name. • Metric is available to both the source and the target models.

Notes:

- When matching project components between the source model and the target model, Accolade ignores initial spaces, initial numerals, and letter case, but not final spaces or numerals.
- Accolade adds gate documents, deliverables, and activities from the source project that do not have a direct match in the target model as related documents in the target project. If a deliverable is created as a related document, all of its activities also are created as related documents in the target project.
- Publishing older versions of a document that was included in a project migration or copy, or uploading a document that was downloaded from a source project into a new project, can update metrics in projects related to the source project, not the newly created migrated project.

After a project is migrated, document owners should download the template or the latest version from the new project, refresh the data and update the project system ID references as necessary, and upload the document to the new project.

- The migration map does not control whether a project team or the project history migrates to the new project. Process Managers select whether to include this information when completing project migrations.

Migrating and Copying Projects

At times, a project may need to change process models. For example, when a concept or idea project has been approved and needs to move to a process model that contains the development process. In this case, Process Managers can transfer all the data gathered through deliverables and activities in idea portions of the project to a new project that also contains the additional stages and gates that take the project through the development and release process.

Important! Publishing older versions of a document that was included in a project migration or copy, or uploading a document that was downloaded from a source project into a new project, can update metrics in projects related to the source project, not the newly created migrated project. After a project is migrated, document owners should download the template or the latest version from the new project, refresh the data and update the project system ID references as necessary, and upload the document to the new project.

Process Designers create the migration maps required for project migration, and Process Managers with Migrate Project rights can migrate and copy projects. Prior to migrating projects, Sopheon recommends reviewing the Criteria for Successful Project Migration topic in the online Help.

To receive an email notification about a project created through migration, subscribe to the **When a project is created through copy or migration** email notification in your user profile.

To migrate or copy a project:

1. Display the project.
2. Click in the upper right corner of the page and select **Migrate or Copy**.
3. In the **Migration Map** field, select the map to use for migration purposes.

   Copying a project is the same as migrating a project. Select a migration map that uses the same process model as the original project when creating a copy.

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

Field	Description
New Project	Enter a name, up to 64 characters long, which identifies the new project.
Project ID	If prompted, enter an ID that displays on the project header and in reports. **Note:** The process model configuration, or a system parameter, determines if you can enter a project ID when creating a project. The configuration may be defined to generate the ID based on a metric value or sequentially as projects are created.
Description	Enter a description of the purpose or nature of new project. This description helps other users identify the project throughout Accolade.

5. In the **Project Manager** field, click **Select** and select the leader for the new project.

   To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.

   - Clicking **Select current user** will assign the role to the current user (if they have the appropriate rights).
   - Selecting a **Function** in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.
   - Clicking the **Show advanced filters** check box displays or hides the additional filter options.
   - Clicking **Clear** removes the current user assignment, and displays **[None]** to indicate that no user is assigned.
   - If **Project Manager required on create** is set at the model level, a project manager must be selected when creating the project.
   - If a default manager is set at the model level, you cannot select a manager when creating the project. However, you can change who is assigned to the project after the project is created.
   - If a selection is not required at initiation and you create a project without designating a Project Manager, one can be selected later in the project's header.

6. Select the **Project Manager can manage team** option if the selected user has the ability to assign, remove, and replace members of the project team.

   - If the selected user has the Project Manager user role but does not have Process Manager or Idea Manager with Manage Team rights, the selection made here overrides the Manage Team rights for that user for this project.
   - If the selected user is a Process Manager or Idea Manager with Manage Team rights for the project's access group, this option is selected and disabled.

- If the project manager should have all other project management abilities *except* for managing teams, leave the option cleared.

7. Complete the following details about the new project:

Field	Description
Next Stage or **Next Gate**	If prompted, enter the next stage or gate for the new project.
Access Group	Select the group that determines which users have access to the new project. Your management rights allow you to create projects in access groups that are enabled for selection in the list.
Security Lists	If security lists are in use, select the check boxes in every list to specify which users have access to this project based on security list settings.

8. Select what aspects of the original project to copy to the new project.

Field	Description
Retain project team	Select this check box if you want to move the current project team with the current document assignments, to the migrated project. If you do not retain the team, current and future document assignments are deleted. If you are migrating a project that has extended edit rights enabled for team members, the new project's process model must have **Extend project edit rights** selected in order for the team members to have these rights in the new project.
Retain project history	Select this check box to include the original project's history in the new project.
Copy project links	Select this check box to add the original project's related project links, including links created with link rules and manually-created links, to the new project. Links that are not valid for the new project are not copied.

9. To close the original project, select the **Close source project** check box and enter any optional notes in the **Source Project Close Note** field to attach to the original project.
10. *(Optional)* In the **Remarks** field, enter any additional information about the project migration or copy.
11. If defined for the project, enter the appropriate metric values for the new project in the **Metrics** section.

If metrics are defined with Track History then metric trends are created for project migration. See Tracking Metric Change History.

12. Click **Continue** to display a preview of the migration or copy.
13. Review the preview and click **Finish** to complete the migration or copy.

Notes:

- When you migrate or copy a project, all gates before the selected next gate in the migrated project are set to **Go**, and no reason is recorded for the decisions. To record a reason for each gate, select the first gate in the migrated project as the next gate and manually change each gate to **Go** and enter a reason.
- Microsoft Project plans saved as document versions in the project are not included in the migration.
- Resource plans are not included in the migration.

Exercises - Create a New Project via Project Migration

Try out what you have learned!

- Review migration criteria.
- Migrate the project, providing a new name for the target project.
- Retain the project team and do not close the source project.

Linking Related Projects

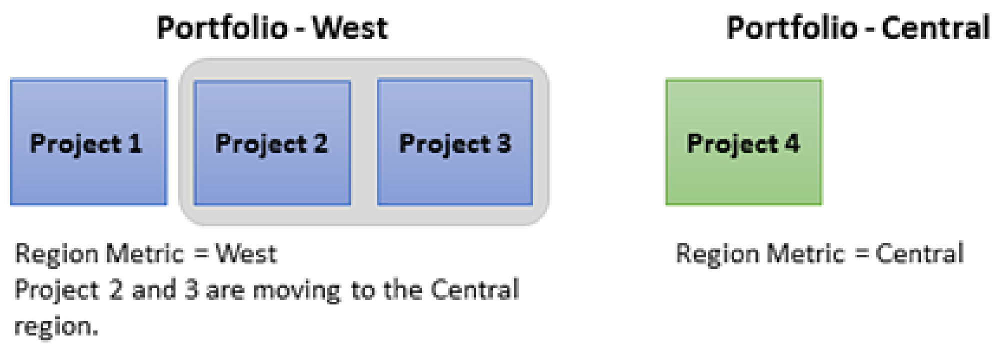
Related projects are those that are connected to the current project by some kind of relationship. For example, projects might be linked if they must start and end at the same time, or must finish before a second project can begin. Projects may also represent a component or sub-project of a larger project. Project links do not enforce the dependency relationship. They simply show how a project is related to other projects. Projects can also be organized into portfolios, or groups of projects.

Administrators and Process Designers define the types of links that are available to select when linking projects. The link types and projects available for selection are based on the link type definitions. If you do not see a link type or model, verify the link type setup with the Process Designer. A project can have a combination of manually created project links and those created automatically using link rules.

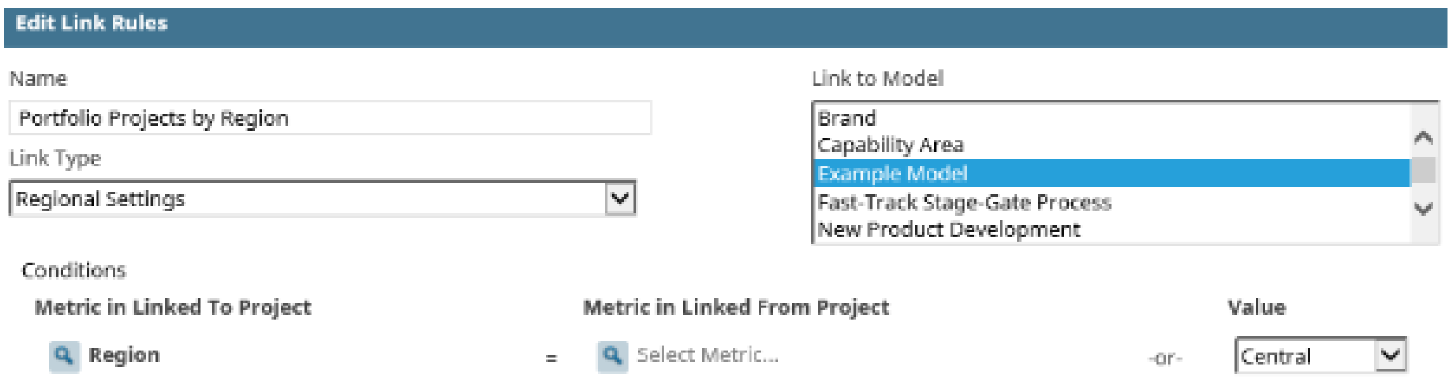
Automatically Creating Project Links

For larger programs, it can be more efficient to create a rule based on a metric selection that establishes the link between the main project and the sub-projects that contain that metric setting. For example, if a program or project changes to a different business unit or is classified into a different product area, using a link rule allows you to update all the links at once by changing only the rule definition, and not opening each project to reset the project link.

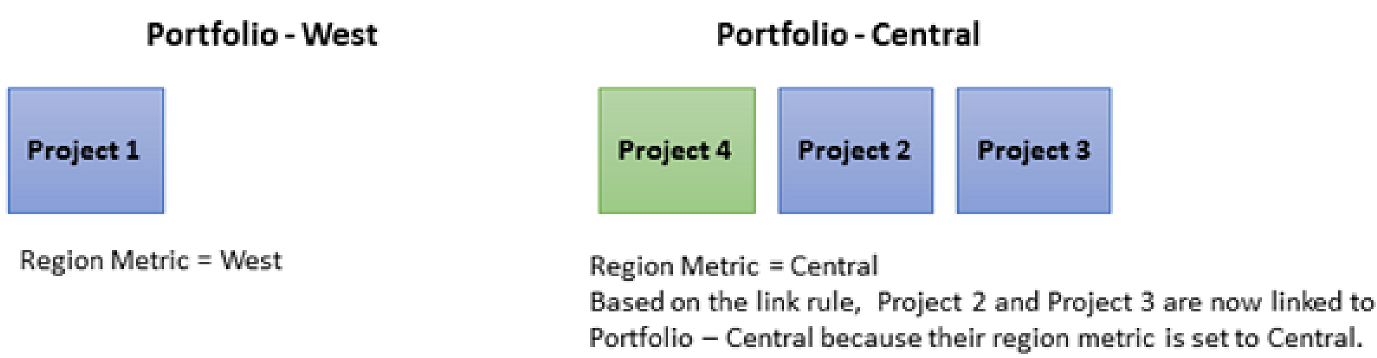
EXAMPLE Example



1. Create this link rule in Portfolio - Central



2. Change the Region Metric value on Project 2 and Project 3 to Central.



Process Designers can set automatic link rules at the model level that are applied to all projects that use that model. Process Managers and Idea Managers for idea projects, with Manage Process rights can define automatic link rules within individual projects. An individual project can have a combination of rules created from the model and individually on the project.

To automatically create a link between projects:

Note: Prior to creating a link rule, determine the metric names and values to use to create the conditions that automatically connect the projects.

1. Do one of the following:

- **To set rules for all projects that use a model** - Display the model and click **Project Link Rules**.

  Changes to link rules on the process model do not apply to closed projects. However, if a project is reopened, the link rules apply and links are created as necessary.

- **To set rules for an individual project** - Display the project and select the **Related Projects** page. Click **Edit Link Rules** in the top right corner of the page.

2. In the **Name** field, enter a name to identify the link rule.
3. In the **System Name** field, enter a unique system name to identify the rule across the system and in process model download/upload.

   If a system name is not entered, the system will generate a system name.

4. In the **Link Type** field, select the link type to use within the rule.

   The link types available are based on the models defined in the link type's **Link Type Rules** selections.

5. In the **Link to Model** field, select one or more models that projects must use to be automatically linked using this rule.

   The models available are those included in the models defined in the link type's **Link Type Rules** selections.

6. In the **Conditions** section, click under **Metric in Linked To Project** to select one metric within the source project. Choose the metric category and search for the appropriate metric.
7. Click **Select** to add the metric.
8. Do one of the following to select a metric or value for the target project:
   - Click under **Metric in Linked From Project** to select one metric within the target project. Choose the metric category and search for the appropriate metric. Click **Select** to add the metric.
   - Enter an appropriate value for the target project.

     The target project's metric must equal the value or metric in the source project to create the project link.

     If you define multiple conditions in a rule, projects must match all conditions to create the project link. If a metric that is part of the link rule is deleted from Accolade, project links are created based on the remaining portions of the rule definition. The existing links based on the deleted metric are not deleted.

9. *(Optional)* To add multiple link rules, click **Add New** and repeat steps 2-8.

   If you add multiple rules, a project must only match one rule in the list to create the project link.

10. Click **Save**.

    When adding a new link rule, you have the choice to process the data immediately for the current project, or later for future projects.

Choosing **Yes** will prompt Accolade to evaluate all current projects for link opportunities. Depending on the number of projects, it can take a moment for all related projects to display in the list.

Choosing **No** will prompt Accolade to save the link rule for the future. It will then evaluate any newly created projects you add in the future for link opportunities.

Manually Creating Project Links

Projects can contain links created manually within the project instead of based on a rule. For example, one project may require that another project be complete prior to beginning. Create links that are unique to a single project manually using the process described below.

To manually create a link between related projects:

1. Display the project and select the **Related Projects** page.
2. Do one of the following:
   - **To add a new project link** - Click **Add New** in the lower right corner of the page.
   - **To edit an existing project link** - Click the name of the link to edit.
3. In the **Link Name** field, select the name that expresses this project's relationship to the other project (as seen from the perspective of this project).

   To add projects to a portfolio, use the Child Relationship link type and select **Contains** (in the portfolio project) or **Member Of** (in a project that is part of the portfolio). Other link types may be available for selection. If the link names are not clearly defined, ask your company's Administrator or Process Designer which link to use.
4. In the **To Project** field, click **Select**, select the project that this project is related to, and click **Set Related Project**.
5. In the **Comments** field, enter any information that helps to describe the link between the two projects.
6. Click **Create** to create the new project link.

Notes:

- To delete a manual project link on an individual project, click in the delete column. To delete a link rule, click next to the link rule in the Edit Link Rules dialog box. Link rules created in the process model cannot be deleted at the project level.
- If you copy a process model, the link rules in the source model are not copied to the new model.
- You can only edit link rules for process models to which you have configuration access group rights. Only process models to which you have configuration access groups display

for selection when linking related projects. However, you can edit rules linked to multiple models even if some models you only have view access groups rights to.

- If a link type is configured with a **Max Project Links** value, you cannot create more than the number of links set for the link type. Existing links are not automatically removed when the value is set; therefore, if project links existed prior to the max value being set, it is possible that more links exist than the maximum allowed. In this case, you must manually remove links between projects to respect the max value before creating any additional links.
- If a process model or the final metric assigned to a rule are deleted from Accolade, the link rule becomes invalid. The existing links created prior to the deletions are not deleted.
- If a link type assigned to a rule is deleted from Accolade, the link rule is also automatically deleted. The existing links created prior to the deletion are not deleted.
- In some circumstances, the name of the link may differ between the projects in Portfolio Browser. The name in the browser is the same regardless of which project the link is viewed from, while the name on the **Related Projects** page within a project expresses the nature of the link from the perspective of the project that the link is being viewed from.

Closing and Deleting Projects

Closing a project prevents any further changes in the project and is the first step to deleting it. A closed project remains in the Accolade database, and it and its documents are still available through Quick Search and Advanced Search. Data in a closed project cannot be changed unless you reopen the project. Close projects that are finished and no longer require updates.

Deleting a project removes the project, its related files, deliverables, , and other data from the Accolade database. You must close a project before you can delete it. Delete projects that were created in error, or that are no longer applicable.

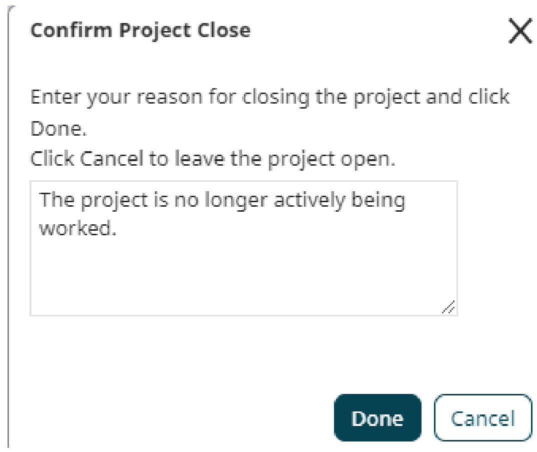
Process Managers and Idea Managers with Manage Process rights can close projects. Process Managers and Idea Managers with Delete Project rights can delete projects.

To close a project:

Set the gate decision for the final gate in the project to **Kill** before you close the project, so the gate's decision is reflected in reports.

1. Display the project.
2. Click in the upper right corner of the page and select **Close Project**.
3. *(Optional)* In the confirmation dialog box, enter any comments about why the project is being closed.

   Comments entered here are stored in the project's event history and are available for reporting purposes.



4. Click **OK**.

To delete a project:

Important! Consider deleting projects carefully. There is no undo action after a project is deleted.

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1. Display the project.
2. Click in the upper right corner of the page and select **Delete Project**.

Notes:

- If the **Protect Document Versions from Deletion** option is selected in the process model, and versions of any documents exist on the project, you cannot delete the project.
- When a project is deleted, any snapshot data stored is also deleted for that project.
- To re-open a closed project, display the project, click in the upper right corner, and select **Re-Open Project**. If a project's model is changed while the project is closed, the changes are not automatically copied into the project if it is reopened. If a variety of changes have been made in the model while the project has been closed, it may not be possible to realign the project with the modified model.

Creating and Sharing Pages for Stakeholders

Project Managers can create a shareable, read-only page from an existing project to share with stakeholders. To create a read-only view of a project page, the **Enable Stakeholders** system parameter must be enabled.

Stakeholders log in to view the shared page using with a unique link and password provided by the Project Manager. The stakeholder sees the same data based on the access levels of the Project

Manager of the project, however, other projects and information stored in Accolade cannot be accessed. For more information on what is shared with outside stakeholders, see Stakeholder View.

Shared pages can be edited after creation, access can be revoked at any time, and the page can be deleted. Deleting the page removes the shared layout from Accolade, not the related project data, and prevents further access from stakeholders.

Important! To revoke access from a shared page, remove the recipients and change the **Page Password**.

To create a shared page for stakeholders:

1. Display a project and navigate to the desired project page.
2. Click on the upper right corner, and select **Share with Stakeholders**.

   The current page layout is captured and appears on the right. All items that were on the current page layout are shown as selected, indicated by green check-marks. Other available items load on the left of the page.
3. Click on items to include or exclude them from your shared page.

   Selected items will be highlighted by a green check-mark, and unselected items will be indicated by a gray X.
4. Click **Next** to preview your layout. Re-size and rearrange your items as needed.
5. Click **Next**.

   A condensed preview of the layout with the selected items loads on the right.
6. On the left side of the page, complete the necessary recipient details:

Field	Description
Page Name	Enter a name, up to 64 characters long, which identifies the shared page. The name also displays in the email to recipients but can be edited before sending.
Recipient Name **Recipient Email**	Enter a name, up to 64 characters long, to identify the recipient. Add the recipient's valid email address. Click **Add Recipient** to add additional recipients.
Page Password	Enter the password that stakeholders need to input in order to access the shared page. The password must contain at least eight characters and three of the four below character types: • Lowercase letters • Uppercase letters • Numbers • Symbols **Important!** The password is not included in the email to recipients and must be provided outside of Accolade.

Field	Description
	Re-enter the password to confirm it.
Expiration Date	*(Optional)* Enter the last date by which a stakeholder can access the shared page. At the start of this date, the stakeholder will not be able to access the shared page.
Comments	*(Optional)* Enter comments or other helpful information for recipients that is included in the email body.

7. Click **Share Page** to open your default email client to compose and send the email.

   If an email is not sent right away, the page is saved and can be shared, edited, or removed at a later time.

Edit and Delete Shared Pages

To change the layout of a shared page, update the recipients who can view the page, or to change the password to log in, edit the shared page. Recipients who are removed can no longer log in and view the information.

Deleting a shared page removes it from Accolade, not the related project data, and prevents further access from stakeholders.

To edit a shared page:

1. Display a project.
2. Click on the upper right corner of the page and select **Edit Shared Page**.

   A list of all shared pages associated with the project displays.
3. Select the desired page using and click **Edit Page**.
4. The shared page's layout opens. To edit what items appear on the shared page, click on the pods to add or remove them.

   Selected items will be highlighted by a green check-mark, and unselected items will be indicated by a gray X.
5. Click **Next**. Re-size and rearrange your items as needed.
6. Click **Next**. On the left side of the page, edit recipient details.

Field	Description
Page Name	Enter a new name, up to 64 characters long, which identifies the shared page. The name also displays in the new email to recipients but can be edited before sending.
Recipient Name **Recipient Email**	Click next to the desired recipients to prevent them from accessing the shared page.

Field	Description
	Click **Add Recipient** to add additional recipients using their name and email address.
Page Password	Enter a new password that stakeholders need to input in order to access the shared page. The password must contain at least eight characters and three of the four below character types: • Lowercase letters • Uppercase letters • Numbers • Symbols **Important!** The password is not included in the email to recipients and must be provided outside of Accolade. Re-enter the password to confirm it.
Expiration Date	*(Optional)* Enter the last date by which a stakeholder can access the shared page. At the start of this date, the stakeholder will not be able to access the shared page.
Comments	*(Optional)* Enter comments or other helpful information for recipients that are included in the email body.

7. Click **Update Page** to save the changes and open your default email client.

To delete a shared page:

1. Display a project.
2. Click on the upper right corner of the page, and select **Edit Shared Page**.

   A list of all shared pages associated with the project displays.
3. Select the page to delete using and click **Save Changes**.

   The shared page is not deleted until the changes are saved. The message *Shared page(s) have been deleted* will display.

   Upon deletion, attempting to log in to view the shared page displays *Layout Preview Not Available*.

Stakeholder View

Stakeholders access the URL to the shared page in the email sent by the Project Manager. Opening the shared page prompts stakeholders to input their password.

The shared page is a real-time view of the project data in Accolade based on the access levels of the current Project Manager. Navigational elements, such as the header navigation and hyperlinks to other areas of Accolade, are removed so only the data that is shared can be accessed.

- The message *Invalid login credentials supplied* displays if an incorrect password is used to sign in.
- The message *Data Not Available* displays for unsupported pods and for pods where no data is available.
- The message *Layout Preview Not Available* displays if access to the shared page has been revoked or if it has been deleted.
- The message *This page can no longer be viewed as there is no project leader.* displays if there is a project page shared and there is no longer an assigned Project Manager. In this instance, a Project Manager must be assigned before stakeholders can access the shared page.

Stakeholders close the page by clicking **Close** at the bottom of the screen.

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