Accolade Process Model Design Quick Reference

Navigating Accolade

ACCOLADE   Project   Process   Resource   Idea   Administration   Time Tracking   Planning   ?   Search...   🔍
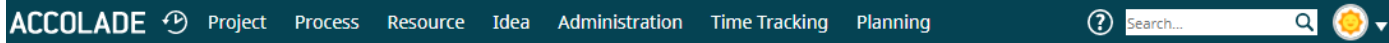
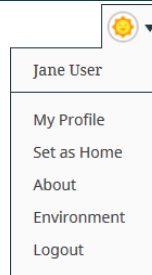**Navigational Components That Are Always Available**

🕐 Displays recently accessed items.

❓ Displays Help content for the current page.

Search - Enter text to search for projects and documents.

Menu - Access main level pages. Some menus may link to outside pages.

Jane User
My Profile
Set as Home
About
Environment
Logout

Additional actions:
- Access your user profile
- Set the current page as your Home
- Log out of the system
- View the Accolade version

Process Models

Stage 1 - Scoping	Stage 2 - Build Business Case	Stage 3 - Development	Stage 4 - Testing and Valida...	Stage 5 - Launch
	Gate 1 - Go to Build Business Case	Gate 2 - Go to Development	Gate 3 - Go to Testing and Validation	Gate 4 - Go to Launch
	Nov 09, 2021	Dec 28, 2021	Jan 08, 2022	Mar 31, 2021

Stage - Period when the project team is gathering information or developing.

Gate – Decision points throughout the process flow.

Creating Process Models

Process
Models >
Templates >
Reference Tables
Portfolio Snapshots
Configuration >
Import/Export >
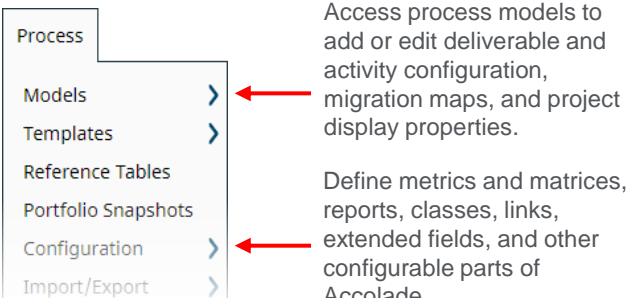
Access process models to add or edit deliverable and activity configuration, migration maps, and project display properties.

Define metrics and matrices, reports, classes, links, extended fields, and other configurable parts of Accolade.

Creating Classes

Classes group process models into categories that share similar process types and characteristics. The primary different between classes is the process model type.

- **Gated** - Follows the classic Stage-Gate Process. Includes one or more sets of stages and gates.
- **Non-Gated** - Includes one stage but no gates.
- **Idea** - Used for Idea Submission. Can contain one or more stages and gates.

Classes determine the stages and gates of process models.

Creating or Updating Process Models

1. Click **Add New** or click the model name to edit.   .
2. If adding a new one, select the class that determines if the model is gated or non-gated.
3. Complete or update model properties in the Process Definition to define display and behavior for projects.
4. Ensure the model is active and click **Apply.**

🍕 **Back Pocket Pizza**
🚀 New Product Development

Project Manager
✉ 💬 Brenda Majors

The class and other project details display above the process model graphic in each project.

Adding Stages and Gates to Process Models

Important! You can only add stages or gates in sequential order, and you cannot add or remove stages or gates when the model is active and assigned to a project.

1. Add a new model or click a model name to edit.
2. In the model tree, click 🔲 or 🔶 to add components.
3. Complete the necessary information.
4. Continue adding stages and gates as necessary in the order in which they are to be completed.
5. Click **Apply** to save your changes.

### Adding Deliverables and Activities to Model Stages

1. Add a new model or click a model name to edit.
2. Select the stage to add the deliverable or activity.
3. In the model tree, click 📋 or 🔵 to add components.
4. Complete the deliverable or activity properties, adding templates, quick grids, or other Accolade components.
5. Click **Create** or **Apply** to save your changes.

Adding Gate Documents to Model Gates

To add gate documents, follow the steps to add deliverables or activities to stages. However, select the gate to which the gate document applies and click 🟩 in the model tree.

Adding Custom Pages

🏛 Portfolio
💬 Discussions
🏛 Resources
✳ Portfolio Browser
▦ Risk and Actions
🏴 Project Brief

If there are active page layouts defined (see other side) you can select to add one or more of those layouts to a model as custom pages.

1. Click a model name to edit or add a new model.
2. In the **Visible Tabs** field, select the **Layouts** option.
3. From the drop-down list, select the layouts to include as project pages.
4. Click **Apply** or **Create**.

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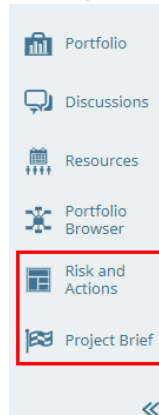
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Deliverable and Activities

Deliverables help gatekeepers decide whether to continue or stop a project and can include any or all of the following:

- Templates
- Quick Grids
- Workflows (optional Accolade component that is covered in detail in the Collaborative Workflow Quick Reference)

Each item is selectable within the deliverable configuration in the model. Activities are subtasks within a deliverable, and can also contain templates, quick grids, or workflows.

Adding Templates for Use in Deliverables and Activities

Templates are the starting point for process documents and can be used to update project details or to create a document with details directly from a project.

1. From the **Process** menu, select **Templates > Template Library**.
2. Click the name of an existing template or click **Add New**.
3. Complete the template information, selecting **Process Document** as the **Type**.
4. If you are adding a new template, click 🔍 and upload the template file.
5. Click **Create** to add a new template or **Apply** to save changes to an existing template.

Adding Templates to a Deliverable or Activity

1. Display the model that contains the deliverable or activity.
2. From the model tree, select the deliverable/activity to modify.
3. In the **Template** field, click 🔍 to select the template to add.
4. Click **Apply** to save your changes.

Custom Project Pages

Creating Page Layouts

1. From the **Process** menu, select **Templates > Layouts**.
2. Click **Add New** in the Layout Designer.
3. Complete page layout information, ensuring the layout is active.
4. Click ⊕ to add a pod to the layout.
5. Populate the pod with content in the Pod Detail pane.

Creating and Adding Quick Grids

 Matrix Quick Grid   Standard Quick Grid

1. Select **Process > Templates > Quick Grids**.
2. Click the name of an existing grid or click **Add New** to create a new quick grid.
3. Use the drag-to-design features to create grids, add metrics, and modify software controls in the center canvas to populate the grid.

 Click the column header to add, delete, or move a column.

 Click the row label to add, delete or move a row.

4. Add styling and formatting to the cells, noting that the available properties are different depending on the selected in the cell control type.
5. Ensure the quick grid is active and click **Save**.

Adding Quick Grids to a Deliverable or Activity

1. From the **Process** menu, select **Models** and click the model name to edit or add a new model.
2. Expand the model tree and select the deliverable or activity to modify.
3. In the **Quick Grid** field, click **Select** and select the grid to add.
4. Click **Apply** to save your changes.

6. Style the pod, using the preview to see what the layout looks like.
7. Click **Add** or **Update** to save your changes.
   - 💡 Associate the layout to a process model to have it display as a project page.

Other Process Model Options

Process models also contain the following configuration options, which are described in detail in the online Help:

- Process graphic customization.
- Team page settings.
- Metrics, matrices, and reports available to the model.
- Start date, end date, currency, and extended project data label and display settings.