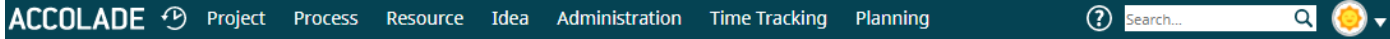


Accolade Process Model Design Quick Reference

Navigating Accolade

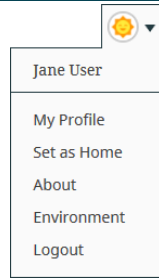


Navigational Components That Are Always Available

- 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.



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

Gate - Decision points throughout the process flow.

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.

Creating Process Models

Process	
Models	← Access process models to add or edit deliverable and activity configuration, migration maps, and project display properties.
Templates	
Reference Tables	
Portfolio Snapshots	
Configuration	← Define metrics and matrices, reports, classes, links, extended fields, and other configurable parts of Accolade.
Import/Export	

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**.



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

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	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. <ol style="list-style-type: none">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.
Discussions	
Resources	
Portfolio Browser	
Risk and Actions	
Project Brief	

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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



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**.

Properties **Appearance**

Text

Font

Tahoma

Size

12px

B I U

Text Color

Alignment

Background

Background Color

Borders

Style

None

Width


Border Color

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.