Sopheon Accolade®

Project Participation - Project Assignments Training Guide

Version: 16.2

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

- Project Team Member

Terms and Concepts

- Accolade Navigation

Related Training Modules

- Getting Started with Accolade
- Understanding Projects

Viewing Your Work

While you can view your work on individual projects, the Work pod allows you to view all of your work throughout Accolade in one, central location. The pod displays information as it relates to your work in a card format and allows you to take many actions without navigating to a different page. The Work pod can be found in a number of different places, including:

- The **My Work** page, accessible from the **Workspace** menu. This page has two Work pods that are configured to display Projects where you are a team member, and Deliverables and Activities that are assigned to you.
- The **Upcoming Gates** pages, accessible from the **Workspace** menu. The pod on this page is configured to display gates in projects you are a part of so you can see upcoming gate meeting dates and related details. This is accessible to users with the Gate Manager, Executive, or Process Manager roles.
- The **Comprehensive** and **Focused** home page layouts.

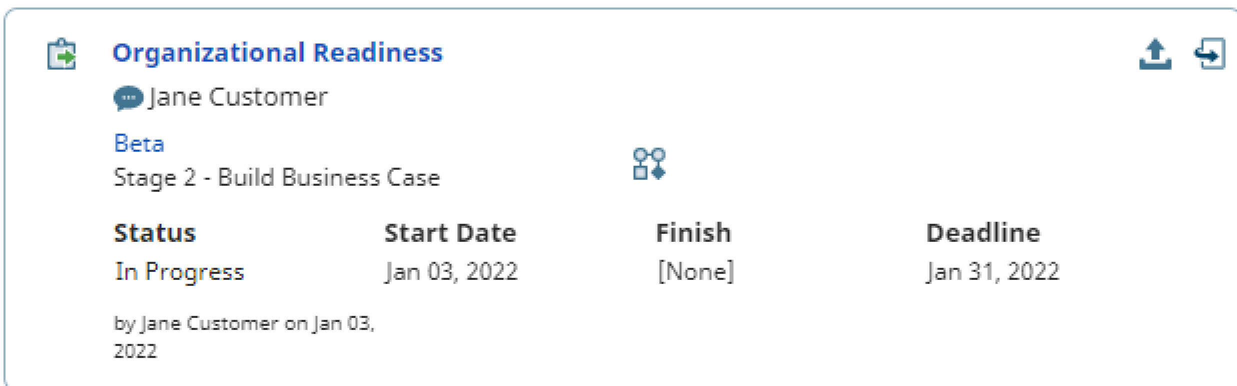
- The Work pod can also configured to display on a project page by an Administrator or Process Designer where it will only display information related to that project.

  Depending on your system configuration, the location of the Work pod may vary. The pages listed above can be renamed or may not exist.

Regardless of where it's accessed from, you are able to control the data the pod displays. To do this, click at the top right corner of the Work pod to open the **Content Settings** dialog and change the value in the **View** field. To show only your work, check the **Show only my work** box. You can also filter and sort the cards to display the most pertinent information. The options available depend on the type of work displayed.

The available **View** options include:

Deliverables and Activities



When *Deliverables and Activities* is selected, the cards in the pod represent deliverables and activities assigned to you.

- Click anywhere on the card to flip it over to show **Status Notes**. Select the field to edit the status notes and click out of the field to apply the changes. Click the card again to flip it back over.
- Click inside any of the fields on the card to update the value.
- Click the name of the deliverable or activity to open a dialog box with more details.
- If available, click to open and edit the associated quick grid.
- If the deliverable or activity is part of a workflow, click to view the workflow where it can be started or stopped. Workflows in progress display on the card.
- Click to upload a new version of the deliverable or activity, upload a new version and publish, or to upload a new related document. Click to download the template or the latest version of the document if available.

Document reviewers can click to approve a document or to skip a document. After selecting an option, the document reviewer is prompted to enter a decision.

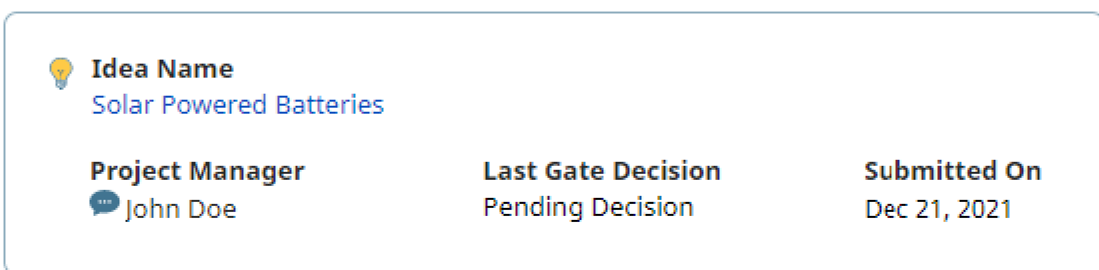
Gates

Gates only displays information for users with the Gate Manager, Executive, or Process Manager roles.

When *Gates* is selected, the cards in the pod represent gates throughout projects you are a part of so you can see upcoming gate meeting dates and related details.

- Click anywhere on the card to flip it over to show filter metrics. Click the card again to flip it back over.
- Click the **Project Name**, **Next Gate**, or **Current Stage** to open the related project page.
- If available, hover your mouse over the **Ready** icon to check the status of related deliverables and activities associated with the next gate.

Ideas



When *Ideas* is selected, the cards in the pod represent ideas that you have submitted. The cards that display are read only.

- Click the idea name to open the related project.
- To send an idea to the Project Manager, click next to the Project Manager and select **Email** to open your default email client.
    - The email includes the name of your idea and a link to view the project, and can be edited before sending.

Projects

When *Projects* is selected, the cards in the pod represent projects where you are listed as a project team member.

- Click the name of the project to open the project home page. Click the name of the next gate to open the related project page.
- The front of the card displays any configured filter metrics.
- Click anywhere on the card to flip it over to show **All Deliverables to Next Gate**. Click the card again to flip it back over.
- Click to mark a project as a favorite. Marking projects as favorites is done on a user-by-user basis and allows you to sort and filter projects in the Work pod based off of your personal favorites.
- If you have *Allow updates from Work Pod* rights, an upload and download icon appear at the top above the cards:
    - Click to upload project information to update multiple projects at once.
    - Click to download project information for the displayed cards to a workbook file.

Notes:

- If your home page is set to **My Work** or **Upcoming Gates** and the page is removed from your system by an administrator, your home page will default to **My Profile**.
- The **My Work** and **Upcoming Gates** pages will always display at the top of the **Workspace > My Workspace** menu even if the order is updated by an administrator.

Viewing Your Projects

Use the Work pod, available on the **My Work** page, to access and review projects in which you are part of the project team. The Work pod provides a single place where you can see details for the projects in which you participate, including status reports, metric values, upcoming gate information, and the status of project deliverables.

> 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" on page 5.

To view your projects:

1. From the **Workspace** menu, click **My Work**.
2. Click at the top right corner of the Work pod to open the Content Settings dialog.
3. In the *View* drop-down, ensure **Projects** is selected.

   If desired, set filter and sort options to control the projects that display.
4. Click **Apply**.

   For more information on the Work pod, see "Viewing Your Work" on page 5.

Working on Deliverables, Activities, and Tasks in Projects

Each stage of a project contains one or more deliverables for that particular stage of development. Project team members complete these documents or physical deliverables and executives making process decisions review them to determine if a project continues to move forward.

- **Deliverable** - 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 discontinue a project. Deliverables can be physical items such as a prototype; however, they are represented in Accolade as documents or as quick grids (or a combination) where document owners can enter information. In addition, a deliverable can have additional reference information attached to it in the form of related documents.
- **Activity** - An activity is 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.

Deliverables and activities can be any of the following types, or a combination:

- File documents, such as documents, spreadsheets, and presentation files.
- Online forms that are completed directly within Accolade.
- Details in the form of quick grids for updating metrics (data gathering points) assigned to the project.
- External documents or web pages.

The various components of a single deliverable or activity are available in the Deliverable/Activity Details, accessible when you click the document's name from anywhere within Accolade. The details provide access to set document dates, assign workflows, enter information in the form of quick grids and extended fields, view dependency information, attach related documents, update the document status and enter status notes, and to access and upload document versions. The information you enter in deliverables and activities updates metrics and values throughout the project.

Deliverables and activities are assigned owners and completed before their required deadlines. Deliverables and activities are editable by those with edit rights in any stage unless the stage is locked or the project is closed.

Viewing Your Assignments

Use the My Work page to review the status of, and access, deliverables, activities, workflow action reviews, or Microsoft Project tasks assigned to you across all your projects. My Work provides a single place where you can see and provide general updates to your project assignments including status, status notes, start date, finish date, and deadline.

The Work pod on the right side of the My Work page includes assignments from both current and future stages, and workflow actions and deliverables, in a workflow if the workflow is currently in progress. Items in the current stage are removed from the Work pod when the next gate meeting decision is set to **Go** (and the project moves to the next stage). All items from a project are removed if the project is closed.

To view your assignments:

1. From the **Workspace** menu, select **My Work**.

   Your current assignments display on the right side of the screen in the Work pod, based on any filters set if you have customized the page.

   - Deliverables that you own that are currently not started.

   - Deliverables that you own that in process.

   - Deliverables that you own that are flagged as in trouble, as they are nearing or have passed their due date.

   - Deliverables assigned to you that are not required.

   - Deliverables that you own that are in a workflow that is currently in progress.

   - Deliverable workflow actions that you own that are started. Applicable only if you use Collaborative Workflow.

   - Activities that you own. Similar icons for activities that are in progress, in trouble, and not required display for activities as deliverables.

   - Tasks from an Microsoft Project plan that you own. Tasks may not map directly to a deliverable or activity within the project, but are to be completed as part of the work in the project. These types of tasks are only applicable if you use Accolade's integration with Microsoft Project.

   To sort and filter the data that displays, click at the top of the Work pod. From here, you can add multiple filtering and sorting options. For more information, see "Viewing Your Work" on page 5.

2. Do one of the following.

- **To filter the returned results** - If you have a large number of assignments and need to see a more refined list, click and define the criteria an assignment must meet to be included in the list.
- **To display an assignment** - Click the deliverable, activity, or task's name to display its details within the project.
- **To display project information** - Click the project's name to display the project's initial page, the project's stage to display the current stage deliverables and activities, or the project's gate to display the current stage gate page.
- **To access a quick grid** - If displayed, click to display the quick grid's details within the project.
- **To download a template or document version** - If displayed, click the icon to view the template or document version available for download. Click the (or similar icon) to download the desired file.

To update status notes:

1. From the **Workspace** menu, select **My Work**.
2. For the deliverable or activity that you want to update, click the card to flip it over.
3. Enter the updated information in the **Status Notes** field and click out of the field to apply the changes.

   The deliverable and activity notes are saved on the My Work page and in the details of the deliverable or activity.

Managing Deliverables from Stages

In the Stages tab, you can view deliverables and activities in two views, i.e. Table View, and Card View.

- Table View presents deliverables and activities in a list like fashion. On upgrade or install, deliverables and activities in the Stages tab are shown in Table View by default.
- Card View presents deliverables and activities in a task board format. This categorizes all deliverables and activities into columns with respect to their current statuses, namely “Not Started”, “In Progress” or “Completed”, allowing you to follow the progress of each deliverable and activity more efficiently, and easily move them between statuses. With this task board, team members get a visual representation of their work in a more collaborative view, and are able to identify bottlenecks quicker.

Note: Accolade will remember which view you last used, and will default to that view when accessing other projects and stages as well.

To switch to Card View:

1. Display a project, and select the Stages tab.

2. Click on **Card View** located on the action bar.

   By default, all cards in Card View are collapsed unless selected. To expand all cards to view each deliverable and activity's information, click on **Expand All** . To collapse, click on **Collapse All** .

   Note: To show or hide information on cards or in the table, click on **Edit Contents** , and select or unselect fields as required.

The following actions can also be done inside the Stages tab:

- To switch back to table view, click on **Table View** .
- After editing which fields or columns to display, you can set those as your default fields or columns for the Card View or Table View respectively, by clicking on **Set View As Default** .
- A deliverable owner or project manager can create an activity under a deliverable that they own. To do this, locate the required deliverable, click on **More** , and select **Add Activity**.

  Note: You cannot add activities to deliverables if the deliverable is set to **Completed**. For more, see Adding Activities To Deliverables.

- Any project team member can upload a new version of a document, or download the latest version of a document or its template, directly from the Stages tab. To do this, locate the required deliverable or activity, click on the **Upload** or **Download** button as needed.
- Any project team member can mark a deliverable or an activity as "In Trouble" directly from the Stages tab. To do this, locate the required activity or deliverable, click on **More** , and select **In Trouble**.
- Any project team member can mark a deliverable or an activity as "Follow Up" directly from the Stages tab. Marking a deliverable or activity as "Follow Up" does not change its status. This flag will only be visible to you, and not to the rest of the team. It works as a personal reminder to follow up on a deliverable or activity. To do this, locate the required activity or deliverable, click on **More** , and select **Follow Up**.

Adding Ad-Hoc Deliverables to Projects

Projects tend to follow a strictly defined process of phases, gates, deliverables, and activities. However not all projects follow this rigid structure. If required, project managers can make adjustments to their projects, by adding any necessary deliverables after the fact as well. These ad-hoc deliverables work exactly like prior-defined deliverables.

To add an ad-hoc deliverable to a project:

1. Display a project, and select the Stages tab.
2. Go to your required Stage.
3. Click on , located next to the Stage name, inline with the action bar.
4. Enter a name, or names if multiple deliverables are required, and click on **Add**. Your deliverables will be created and added to the Stage.
5. Click on the name of the new deliverable to add further details. This opens the deliverable dialog.
6. Click on **Settings**, on the left pane of the dialog.

   Note: The **Settings** option is only available to project managers. Deliverable owners and other team members cannot view this page.

7. Click on the field under **Template**, **Quick Grid(s)**, or **Workflow**, to add and define the respective settings. Select the desired options for each, click **Done**, and click **Apply**.

   Note: Once a template has been added, it cannot be changed. Additionally, multiple quick grids can be added if needed, and quick grids can be removed if they do not have any data in them.

Project Managers can delete ad-hoc deliverables if needed. To do this, locate the required deliverable, click on **More** , and select **Delete Deliverable**. If this deliverable had any activities under it, those will be deleted too.

Completing Work on File-Based Deliverables and Activities

A deliverable or activity may exist as a template or version that the assigned document owner can download and make modifications to prior to saving back to Accolade. A deliverable or activity can also exist as a document that you must create and then save to Accolade.

> If your company has created a research website for a specific deliverable or activity, click the **Process Assistance** option to access the website.

To complete work on a file-based document:

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

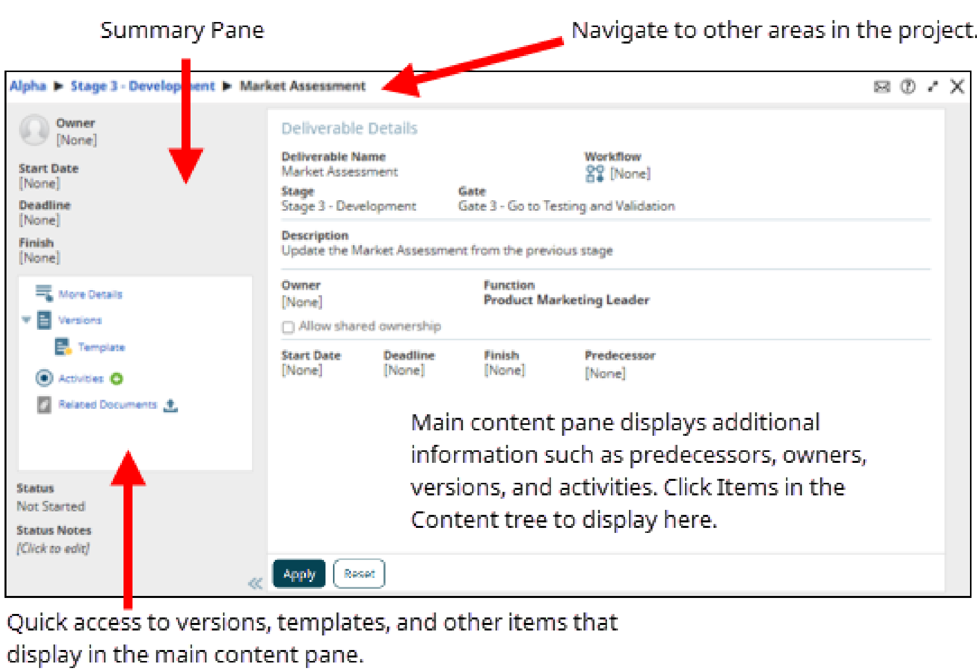
   The number of completed required deliverables and activities displays along the top if the grid. This count does not include deliverables and activities that are set as **Not Required**.

   > You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Identify the deliverable or activity you want to work on and ensure that the current status is set appropriately in the **Status** column.

   Additionally, if the **Allow Document Owners to Set Start Date**, **Allow Document Owners to Set Deadline**, and the **Allow Document Owners to Set Function** system parameters are enabled, as the assigned document owner you can also set the dates and functions for the deliverable or activity, respectively.

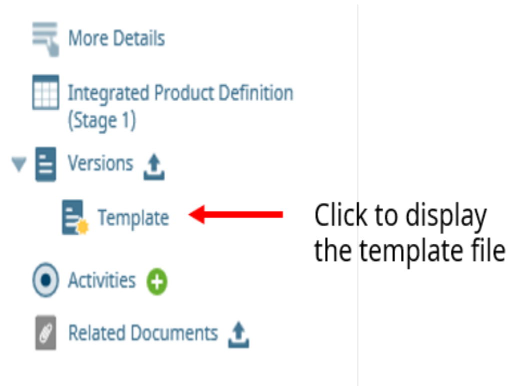
3. Click the document name to display the details.



4. Do one of the following:
    - **To create the initial version of a document from a template** - At the top of the Contents tree, expand the **Versions** section and click **Template**.
    - **To create a new version of a document based on the latest version** - At the top of the Contents tree, expand the **Versions** section and click **Latest Version** to download the latest version to use as a base for the new version.
    - **To create a new version of a document based on another version** - At the top of the Contents tree, click **Versions**. In the **Versions** table, click the name of the version to download. When you edit and save an existing version of a document back to Accolade, a new version is created.

    If there is no template or version available, you can create the first version using a blank document that you save to Accolade. See step 8.

    If the template is a document containing Accolade field codes, a reference table, or a resource plan, you may be prompted to refresh the data in the document with current project information.



5. Open the file and save it to a location where you can find it easily, and save it as the appropriate document type.

    By default, files are saved to the Downloads directory set for your web browser.
6. Update the document as necessary.
7. When you are ready, do one of the following to save a published or unpublished version of the document to the project:
    - If you have the Accolade Office Extensions add-in, save a version of the file back to Accolade using the **Save** option on the Microsoft application's **File** menu.
    - Save a document version from within Accolade.
    - If you would like to save to OneDrive and/or Microsoft Teams channels, see this page: Editing and Saving Documents to Accolade.
8. *(Optional)* In the **Status Notes** field, enter any notes about the status of the deliverable or activity, for example, what is left to complete if the document is not complete or information about what you updated in the version you created.
9. If the deliverable or activity is ready for the next gate meeting, return to the document's details and set the **Status** to Completed prior to closing the details dialog box.

    You can also update the deliverable or activity status on the **Stages** page.

Completing Deliverable Quick Grids

A deliverable or activity may contain one or more grids that you need to populate before the deliverable or activity can be completed. Quick grids also allow other project members to view the specific metrics and data associated with each deliverable or activity.

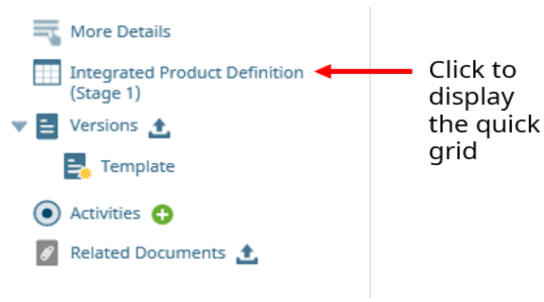
To complete work on a quick grid within a deliverable or activity:

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

   The number of completed required deliverables and activities displays along the top if the grid. This count does not include deliverables and activities that are set as **Not Required**.

   You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Identify the deliverable or activity you want to work on and ensure that the current status is set appropriately in the **Status** column.



3. Click the document name to display the quick grid.

4. Complete the form by entering text and selecting options. Each deliverable can have a unique grid assigned to it.

   You can navigate between fields using keyboard commands. Press **Tab** to move between cells and **Enter** to open text fields for editing.

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

   The fields within a quick grid can be tied to metadata, such as product description, or metrics within a project. As you update values and click **Apply**, those values in the project are also updated.

Notes:

- Every time a user updates and saves a quick grid associated with a deliverable or activity, a PDF version of the quick grid is automatically created and saved if a Process Designer selected for the quick grid to create PDF versions when configuring the quick grid.
- 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 with the quick grid name as it is configured in Accolade.

Completing Work on Online Deliverables and Activities

A deliverable or activity may exist as an online form that does not require the download of a template, or the creation of a document to upload. All the information for the deliverable or activity is entered in a form that displays on the screen.

> To export an online form to a document file, click **Export** from a working copy of the form. Accolade exports the last saved instance of the form.

To complete work on an online deliverable or activity:

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

   The number of completed required deliverables and activities displays along the top if the grid. This count does not include deliverables and activities that are set as **Not Required**.

   > You can also access all deliverables assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. Identify the deliverable or activity you want to work on and ensure that the current status is set appropriately in the **Status** column.

   Additionally, if the **Allow Document Owners to Set Start Date**, **Allow Document Owners to Set Deadline**, and the **Allow Document Owners to Set Function** system parameters are enabled, as the assigned document owner, you can also set the dates and functions for the deliverable or activity, respectively.

3. Click the document name to display the details.
4. In the Contents tree, click the name of the online form and do one of the following:
   - **To open the form for editing** - Click **Open Working Copy** to display an editable version of the online form in a new browser tab. If prompted, select whether to load the form with any metric data from the last saved version, or with the current metric data as it exists in the database.

     You are prompted if the form was saved but not published. It is possible that a saved version of a form can have different metric values than the current metrics if the form was saved without being published.

     Click **Print** from the working copy to print an online form without needing to export.

   - **To share the form with one or more contributors** - Click **Share Working Copy** to open an email in your default email program that contains a link to the online form. Complete the email details including the recipients, a subject, and any explanatory information and click **Send**.

     Recipients must have access to the Accolade server and be defined as an Accolade user; however, they do not need to be a team member on the project to access the shared form. This feature is designed to allow experts outside the project team to contribute to a deliverable. Since this flexibility creates potential security issues, project teams should have a clear policy about sending and forwarding such emails.

5. Complete the contents of the online form.

If a deliverable or activity contains a link to a research website, click the **Process Assistance** button to access the website to complete research while completing the online form.

6. Select how to save your changes:
   - **To create a new version** - Select the **Publish this version** check box to make the version accessible through Quick Search and Advanced Search and click **Save and Create New Version**. To create an unpublished version, clear the **Publish this version** check box prior to saving. Document owners, and any users to which the form is shared, can create a version of an online form.
   - **To save without creating a new version** - Click **Save** to save the changes to the form without creating or publishing a new version. The form displays with the saved information the next time any user opens the form.

     If you share the form for multiple users to edit, they can save their changes, but cannot create a new version.
7. Click **Close** to close the form and return to Accolade.
8. If the deliverable or activity is ready for the next gate meeting, return to the document's details or the **Stages** page, and update the document's status to Completed.

Notes:

- To stop sharing access to an online form, access the form details and click **Remove Shared Access**. All shared links to the document sent through emails are no longer active. If an Accolade user is currently modifying the document, you can proceed, which undoes any unsaved changes, or cancel and contact the editor have them save their changes and close the form.
- If you are using an email system with a restricted-length of mail-to strings, and the **Enable Simple Email Support** system parameter is enabled, a dialog box containing the link displays when you click **Share Working Copy**. Copy the link, create a new email, and paste the link into the body of the email.

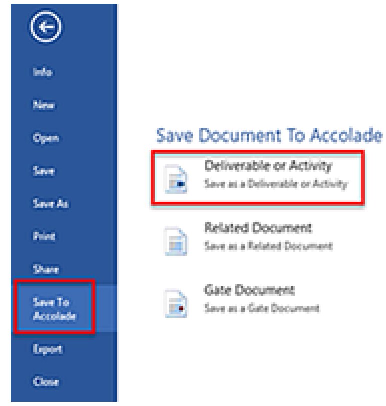
Adding Deliverable and Activity Versions

Each deliverable or activity 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. Owners of a deliverable or activity can add new versions.

If the document is a Microsoft document, use the Accolade Office Extensions add-in to save versions directly to Accolade from the Microsoft application.

You can also add versions from with Accolade. You cannot add a new version of a deliverable if the stage is locked.

To add a deliverable or activity version from within Accolade:



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
Upload New Version	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 **Upload New Version** and selecting files.
Link New Version	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, hold **Shift** and right-click the file name, select **Copy as Path**. Paste the path into the **Link to File** 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. In the **Versions** section, enter any comments regarding the versions, such as what has changed.
6. 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.

7. 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.

Notes:

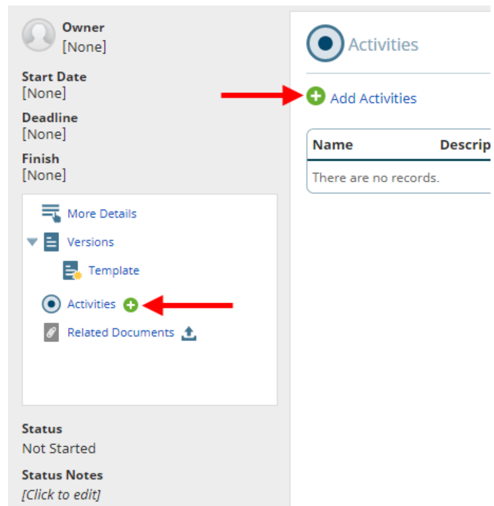
- To delete a document version, click the document name to display the document details. Select the check box in the  column. Click **Delete** or **Apply**. The deliverables and activities must be set in the process model to allow deletions of versions.
- If the **Disable Link to File** and **Disable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

Adding Activities to Deliverables

Process Managers, the Project Manager assigned to the project, and the owner assigned to a deliverable within a project can create an activity that is specific to that deliverable in that project only. Create project-specific activities to help complete deliverables that have not been started or are currently in process or to enable the storage of documents that helped create the deliverable.

You cannot add activities to deliverables in a project if the deliverable is set to **Completed**.

While an activity created in the model appears in all the projects that use the model, an activity created in a project appears only in the project in which it was created, in alphabetical order.



To create an activity for a project deliverable from the deliverable screen:

1. Display the deliverable within the project.
2. In the Contents Tree, click **Activities**.
3. Click **Add Activities** (or click), enter the name of each activity on a separate line, and click **Add**.
4. In the **Activities** section, use the **Status** drop-down and the **Status Notes** fields to enter the current status of the activity.
5. In the **Start**, **Finish**, and **Deadline** fields, manually enter dates, enter the number of days relative to when the stage starts, the number of days relative to when the stage ends, or a percent of stage duration.

   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.

6. Select an activity owner, as necessary.

Field	Description
Function	If a person in a specific job role, such as an Accountant or an Engineer completes the deliverable or activity, select the job role's function from the drop-down list.
Owner	Select the member of the project team that owns the completion of this activity.

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

To make additional changes to the activity, such as to modify the activity's name, description, or to assign a workflow to the activity, click the activity name in the **Activity** section or in the Contents tree to display the activity and click **More Details** in the Contents tree.

To create an activity for a project deliverable from the project time view screen:

1. Open the Project Time View layout on a project.
2. Locate the deliverable to which you wish to add an activity and click the icon in the far right column.
3. A new blank row corresponding to the added activity will appear and automatically be highlighted.
4. Enter a name for the new activity by clicking the blank name column in the new row.
5. Enter values for the new activity's **Owner, Status, Function, Start, Finish,** and **Deadline** fields if desired.
6. An error message will appear if the user clicks **Apply** without entering a name for an added activity. To proceed, the user must close the error message, enter a name, and then click **Apply** again.

To create an activity for a project deliverable from the Stages tab:

1. Display a project, and select the Stages page.
2. Go to the stage that your deliverable lives in.
3. Locate the required deliverable or activity, and click on **More** .
4. Select **Add Activity**.
5. Enter a name, or names if multiple activities are required, and click on **Add**. Your deliverables will be created and added to the deliverable.
6. Click on the fields of the added row or card, and enter details as needed.

Notes:

- To delete an activity added to the deliverable, display the activities list, click in the activity to remove, and click **Apply**. You must have Delete Activity rights to delete an activity.
- You cannot associate a template with activities created in projects. The activity owner can upload the files to create versions, but a project-created activity cannot have an online document.
- Activities added to deliverables in projects respect the **Default New Versions to Published** system parameter. Process Designers can determine publish options when adding activities to deliverables in process models.

Delegating All Your Assignments

To ensure assignments continue while you are out of the office or otherwise unavailable, delegate your assignments to someone else for a specified time period. Your deliverables, activities, and workflow actions that are due within the defined period are automatically assigned to the selected user. The assigned user sees the delegated assignments in their My Work page, and their work history is captured and indicated that the work was completed on your behalf. Be sure to communicate to the selected user that you are delegating assignments to them.

For most deliverables and activities, the delegated user *does not* need to have the same user roles and project access as the original assignment owner. However, you can only delegate assignments to users with one of the following roles: Project Team Member, Project Manager, Idea Manager, or Document Reviewer. In addition, if a deliverable or activity is configured as restricted to only select user roles, the delegated user must have the user roles assigned to the deliverable or activity to be assigned as the delegated owner.

Important! If a user is delegated that is not part of the project team, their access rights are extended to include delegated ownership for the assignments in the project during the specified delegation period.

To delegate all your user assignments:

1. Access your user profile and select the **Details** tab.
2. In the **Delegate Assignments** section, complete the following information:

Field	Description
Delegate to User	Click and select the user responsible for your assignments in your absence. 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.

Field	Description
Start Date	Enter or select the first date in the date range to which the delegation applies. The delegation period includes the date entered here.
End Date	Enter or select the last date in the date range to which the delegation applies. The delegation period includes the date entered here.

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

Notes:

- Only users with the **Can Delegate Assignments** user role can delegate their assignments to other users. Workflow action owners can delegate a single workflow action without having the **Can Delegate Assignments** role.
- Delegated assignments display in the My Work page for both the original owner and the delegated user. To receive notifications about assignments that have been delegated to you, subscribe to the appropriate deliverable, activity, and workflow email notifications in your user profile.

Exercises - Completing Assignments

Try out what you have learned!

- View the complete list of what is assigned to you using the My Work page and open a deliverable.
- Add a version of a document to a deliverable or activity that contains a template. If the deliverable or activity contains a quick grid, make changes in the grid.
- Add two activities to the deliverable.
- Delegate your assignments from today until the end of next week to another member of your project team.

Collaborating with Team Members

Accolade contains several methods to communicate with other users directly from the application. Depending on where you are in the application, you can communicate with individual or multiple team members, gate keepers, deliverable owners, the project manager, or a combination of people on a project.

Accolade offers the following communication options:

- **Emails** - As you are completing project details and reviewing projects within Accolade, send emails directly from the application to members of the project. Direct emails can be helpful if you are reviewing a document's details and have questions for the document owner.
- **Chats** - Start a chat directly from Accolade to collaborate and discuss aspects of a project or document with Microsoft Teams and Slack.
- **Calls** - Start a call directly from Accolade to quickly communicate with team members with Microsoft Teams.
- **Schedule meetings** - Schedule meetings with team members about project related topics with Microsoft Teams.
- **Connect to MS Teams** - Connect an Accolade project to a Microsoft Teams channel, allowing team members to go to, post in, or email members of the connected Microsoft Teams channel directly from Accolade.
- **Discussions** - Use discussions for extended conversations on a variety of topics. Each discussion is a collection of messages. Users with access to the project can enter a discussion and add a message to the thread, allowing other users to respond. The thread of messages also serves as a record of the opinions and information shared during the discussion.

  Users can create and contribute to discussions about a specific project on the project's Discussions page, or can participate in discussions about any project that you are a member of through the Innovation Feed page available from the **Workspace** menu. Discussions may also be available on custom project pages.

In addition, a project may contain one or more deliverables or activities that require more than one team member's expertise to complete. Project Managers can make these types of documents collaborative, and multiple team members can participate in completing the document.

Assigning Yourself to Collaborative Documents

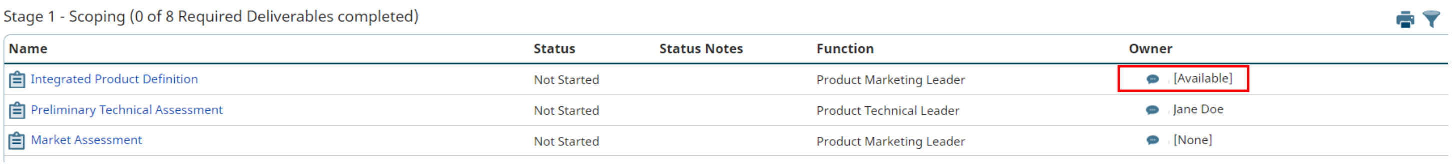
If a deliverable or activity is collaborative, and if it has no current owner, you can assign yourself as its owner. After you finish working on the document, you can unassign yourself as its owner, allowing another team member to make themselves the owner and contribute their information to the document. This process of sequential ownership allows multiple team members to work on the same document.

The Project Manager or a Process Manager selects which deliverables are collaborative.

To assign or remove yourself to a collaborative document:

1. Confirm with the project manager and your team that the deliverable or activity is collaborative and that there is no current owner.
2. Display the project and select the **Stages** page to display all deliverables and activities in the stage.

   If **Available** displays in the **Owner** list, the document is collaborative and there is no current owner.



Stage 1 - Scoping (0 of 8 Required Deliverables completed)

Name	Status	Status Notes	Function	Owner
Integrated Product Definition	Not Started		Product Marketing Leader	[Available]
Preliminary Technical Assessment	Not Started		Product Technical Leader	Jane Doe
Market Assessment	Not Started		Product Marketing Leader	[None]

   You can also assign and unassign yourself to a collaborative deliverable or activity from the deliverable or activity details.

3. In the **Owner** list, select your name as the owner.

   If you are listed as the owner, select **Available** in the **Owner** list to remove yourself and make the deliverable or activity open for another team member to pick up.
4. Click **Apply** to save your changes.

Connecting an Accolade Project to Microsoft Teams

Important! You must have the Microsoft Teams connection functionality installed before proceeding. See the *Accolade Installation Guide* > *Installing the Accolade Application* > *Configuring Accolade*, for more.

You can connect a Accolade project with a Microsoft Teams channel, allowing team members to go to, post in, and email members of the connected Microsoft Teams channel.

Note: The option to connect to a Microsoft Teams channel is only available to Project Managers, Process Managers with Manage Process rights for the access group of a project's main data, or a team member who has extended rights for a project.

To connect an Accolade project to a Microsoft Teams channel:

1. In an Accolade project, click next to the in the upper right corner of the page.
2. Click on **Connect Accolade Project to Teams Channel**.
3. Click on **Select a channel**. The teams available to you are listed from Microsoft Teams.
4. Select a team. The channels in the selected team are listed; select the channel you want.

5. Click on **Connect**.

   Once successfully connected, the communication menu icon changes to one with a green dot , and the name of the selected Microsoft Teams team and channel is displayed, along with the options to **Go to Channel**, **Post in Channel**, **Email Channel**, **Schedule Meeting with Channel**, **Change Channel**, and **Disconnect Channel**.

   Note: The options to change and disconnect a channel are only available to Project Managers or Process Managers with the relevant edit or access rights. Team members without these rights will only see the options to **Go to Channel**, **Post in Channel**, **Email Channel**, and **Schedule Meeting with Channel**.

To create a new Microsoft Teams team and connect it to an Accolade project:

1. In an Accolade project, click next to the in the upper right corner of the page.
2. Click on **Create Team & Connect**.

   Note: To do this, you must have rights on Microsoft Teams to create a team.

3. In the **Create a Team** dialogue:
   - Enter a team name.
   - If this team is to be private, click on the **Private Team** check-box, else your team is public.
   - Ensure the **Copy team members into new team** check-box is ticked, to copy Accolade project team members into the new Microsoft Teams team. Accolade team members with email addresses matching Microsoft Teams users will be added as members of the new Microsoft Teams team.
   - Select the Accolade layouts you require for your team. These will appear as Microsoft Teams tabs on your new team.
4. Click on **Create Team**.

   Microsoft Teams opens, displaying your newly created team with a link back to the connected Accolade project. In Accolade, once successfully connected, the communication menu icon changes to one with a green dot , and the name of the connected Microsoft Teams team and channel is displayed, along with the options to **Go to Channel**, **Post in Channel**, **Email Channel**, **Schedule Meeting with Channel**, **Change Channel**, and **Disconnect Channel**.

   Note: The options to change and disconnect a channel are only available to Project Managers or Process Managers with the relevant edit or access rights. Team members without these rights will only see the options to **Go to Channel**, **Post in Channel**, **Email Channel**, and **Schedule Meeting with Channel**.

To create a new Microsoft Teams channel and connect it to an Accolade project:

1. In an Accolade project, click next to the in the upper right corner of the page.
2. Click on **Create Channel & Connect**.

   Note: To do this, you must have rights on Microsoft Teams to create a channel.

3. In the **Create Channel** dialogue:
   - Select a team from the drop-down.
   - Enter a channel name.
   - Specify the channel's visibility type from the drop-down.
   - Select the Accolade layouts you require in your channel. These will appear as Microsoft Teams tabs on your new channel.
4. Click on **Create Channel**.

   Microsoft Teams opens, displaying your newly created channel with a link back to the connected Accolade project. In Accolade, once successfully connected, the communication menu icon changes to one with a green dot , and the name of the connected Microsoft Teams team and channel is displayed, along with the options to **Go to Channel**, **Post in Channel**, **Email Channel**, **Schedule Meeting with Channel**, **Change Channel**, and **Disconnect Channel**.

   Note: The options to change and disconnect a channel are only available to Project Managers or Process Managers with the relevant edit or access rights. Team members without these rights will only see the options to **Go to Channel**, **Post in Channel**, **Email Channel**, and **Schedule Meeting with Channel**.

To switch the Microsoft Teams channel connected to an Accolade project:

1. In an Accolade project that is connected to a Microsoft Teams channel, click next to the in the upper right corner of the page.
2. Click on **Change Channel**.
3. Click on the team and channel name. The Microsoft Teams teams available to you are listed.
4. Select a team. The channels in the selected team are listed; select the channel you want.
5. Click on **Connect**.

To disconnect a Microsoft Teams channel from an Accolade project:

1. In an Accolade project that is connected to a Microsoft Teams channel, click next to the in the upper right corner of the page.

2. Click on **Disconnect Channel**.
3. In the dialog that opens, click **OK**.

Sending Email Directly from Accolade

As you are completing project details and reviewing projects within Accolade, you can send an email directly from the application to members of the project team including team members, the project manager, gatekeepers, gate owners, and deliverable and activity owners.

You can send an email that contains links to access projects or documents within Accolade. Only Accolade users who have access to the project can follow the link to open the project.

To send an email to a team member directly from Accolade:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Email.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   An email opens in your default email program with the user's specified email populated in the **To** field.
4. Complete the email details and send the email.

To send an email to a project team member directly from Accolade from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to email and click Email.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   An email opens in your default email program with the user's specified email populated in the **To** field.
4. Complete the email details and send the email.

To send an email to members of a Microsoft Teams channel directly from Accolade:

Note: This option is only available on projects that are connected to a Microsoft Teams channel.

1. In the Accolade project, click next to the in the upper right corner of the page.
2. Under the name of the Microsoft Teams channel, click on **Email Channel**.

   An email opens in your default email program with a link to the project in the email body.

3. Complete the email details and send the email.

   Note: Before you are able to send an email to a channel, if you do not have an email address connected to Microsoft Teams, you must generate one from the Teams app. To do this, in the Microsoft Teams interface, select **Get email address**.

To send a link to an Accolade project:

Note: Only users with access to projects can send a link using the method described below.

1. Display the project to which you want to send a link.
2. Click in the project's header and select one of the following options:
   - **Copy** - Displays a link to the project that you can copy and paste into any document, including email.
   - **Email** - Opens an email in your default email program with a link to the project in the email body. Complete the email details and send the email.

   Copied or emailed links will direct the recipient to the specific project page the sender was on when sharing the link.

To send a link to an Accolade document:

1. Display the project that contains the document to which you want and select the stage or gate that contains the document.
2. Click the name of the document to display its details.

   You can also display the details of the document by clicking a document link from pages such as My Work.

3. Do one of the following:
   - **For gate documents** - Click in the **Name** field.
   - **For deliverable and activity documents** - Click in the upper right of the Deliverable or Activity details dialog box.

   An email opens in your default email program with a link to the project in the email body.
4. Complete the email details and send the email.

Notes:

- If an email icon is disabled and you think the person should have a usable email address, contact your Accolade Administrator.

Starting Chats

You can start a chat in Accolade from any project page with Microsoft Teams or Slack depending on the collaboration tool your organization uses. You can chat with one team member, all team members or team members in any project team; however, Slack is limited to chatting with six.

> **Note:** Users must have an email address defined in their user profile to participate in chats. All users included in the chat must be setup to use the same chat collaboration tool. See your Accolade Administrator for set up.

To start a chat with any team member from a project page:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Chat.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams or Slack opens (depending on the collaboration tool your organization uses) and allows you to start a chat.

To start a chat with a project team member from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to chat with and click Chat.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams or Slack opens (depending on the collaboration tool your organization uses) and allows you to start a chat.

> **Note:** If you've reached the character limit for project team members, you can uncheck a name.

To start a chat in a Microsoft Teams channel from an Accolade project:

> **Note:** This option is only available on projects that are connected to a Microsoft Teams channel.

1. In the Accolade project, click next to the in the upper right corner of the page.
2. Under the name of the Microsoft Teams channel, click on **Post in Channel**.

   Microsoft Teams opens in the connected channel with a link to the project in the message body, allowing you to start a conversation with the members of the Microsoft Teams channel.

Starting Calls

You can start a call in Accolade from any project page with Microsoft Teams. You can call one team member, all team members or select team members.

Note: Users must have an email address defined in their user profile to participate. All users included in the call must be setup to use the same collaboration tool. See your Accolade Administrator for set up.

To start a call with any team member from a project page:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Call.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to call and click **OK**.

   Microsoft Teams opens and allows you to start the call.

To start a call with a project team member from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to chat with and click Call.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to call and click **OK**.

   Microsoft Teams opens and allows you to start the call.

Note: If you've reached the character limit for project team members, you can uncheck a name.

Scheduling Meetings

You can schedule a meeting in Accolade from any project page with Microsoft Teams. You can schedule meetings with one team member, all team members or select team members.

Note: Users must have an email address defined in their user profile to participate. All users included in the meeting must be setup to use the same collaboration tool. See your Accolade Administrator for set up.

To schedule a meeting with any team member from a project page:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Schedule Meeting.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams opens and allows you to schedule a meeting.

To schedule a meeting with a project team member from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to chat with and click Schedule Meeting.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams opens and allows you to schedule a meeting.

Note: If you've reached the character limit for project team members, you can uncheck a name.

To schedule a meeting with a Microsoft Teams channel from a project:

Note: This option is only available on projects that are connected to a Microsoft Teams channel.

1. In the Accolade project, click next to the in the upper right corner of the page.
2. Under the name of the Microsoft Teams channel, click on **Schedule Meeting with Channel**.

   Microsoft Teams opens in the connected channel and allows you to schedule a meeting with the members of the Microsoft Teams channel.

Participating in Project Discussions

Discussions allow team members to collaborate and communicate about projects directly in Accolade. Each discussion is a collection of messages and can be accessed from the project itself or through the **Innovation Feed** available on the **Workspace** menu. Your defined user role may determine how you access project discussions.

Only team members assigned to a project have access to view and participate in project discussions. Restricted Team Members cannot access the discussions for their projects.

Viewing Project Discussions

Project discussions are viewable from the following locations:

- **Innovation Feed** - Available from the **Project > Innovation Feed** menu, use the Innovation Feed to review and participate in discussions from more than one project. Only the three most recent comments in each discussion are displayed by default. To see all the comments in a discussion, click the row containing **View (number) more comment(s)**.
- **Discussion page within a project** - Click the **Discussions** page within a project to review discussions about only that project.
- **Custom pages within a project** - If defined, discussions may also be available within a custom page within a project. Click the custom page icon.

Click to refresh the discussions and ensure you are viewing the most up to date comments for discussions in either location.

Creating Project Discussions and Adding Comments

On the Innovation Feed page, you can create and view discussions in any project shown on your My Work or Upcoming Gates page that you have rights to create discussions in. Any user who can access the Discussions page in a project can create discussions in that project.

To create a project discussion:

1. From the **Workspace** menu, select **Innovation Feed** to display all your project discussions, or display a project and select the **Discussions** page.
2. Click to create a new discussion.
3. If creating a discussion from the Innovation Feed, select the project to which the discussion applies from the **Project** field.
4. In the **Title** field, enter a title that clearly identifies the subject of the discussion.
5. In the **Message** field, enter any initial comments regarding the discussion to get the conversation going.
6. Click **Create** to add the discussion and your initial comment.

   Other project team members can now view the discussion.

To add comments to an existing discussion:

1. From the **Workspace** menu, select **Innovation Feed** to display all your project discussions, or display a project and select the **Discussions** page.
2. In the **Write a Comment** field, enter your comments to add to the discussion.
3. Click **Send**.

Notes:

- To delete a discussion that you created or a comment that you added to a discussion (if you sent the comment and if it is the most recent comment in the discussion), display the discussion and click next to the title to delete the discussion, or next to the comment to delete the comment.

Exercises - Collaborating with Team Members

Try out what you have learned!

- Open a project and send an email to all the members in a project team.
- Send an email to only the project manager.
- If available in the project, open the Discussions page and add a thought about the project to the team discussion.

Related Documents and Images Overview

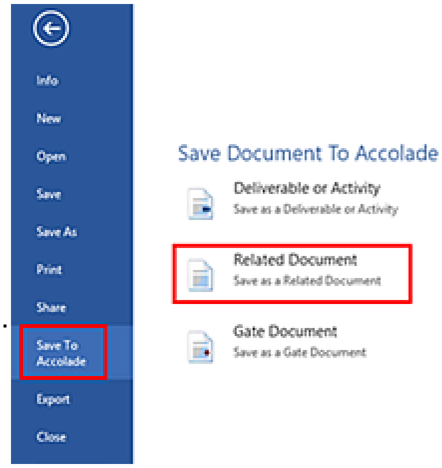
Related documents, including both documents and images, contain information such as standards, procedures, or representative images that may be useful to project members throughout the course of a project. Typically, related documents are not presented at gate meetings, but are aids to completing project work. Related documents can exist on their own, or they can be attached to a deliverable or activity. For example, a deliverable might be for a physical prototype that is presented at a gate meeting. Documents that contain dimensions and notes, and images of the prototype can be added directly to the deliverable.

Related documents can include an array of information that is unique to each project. For example, specifications for components used to build a product, hazard materials information sheets, notes from meetings, and so on.

Anyone with access to the project can view the attached related documents. Members of the project team can add documents and images.

Adding Related Documents

Members of the project team, and Process Managers with Manage Process rights, can add images and other files that provide supporting information to the project. Deliverable and activity owners can also attach related documents to deliverables and activities that they own.



> If the document is a Microsoft document, use the Accolade Office Extensions add-in to add related documents directly to Accolade from the application.

To attach a related document to a project:

1. Display the project and select the **Related Docs** page.
2. Select how to add the document or image.

Source Type	Description
Upload New Related Document	Select this option to upload the file to Accolade. Click and drag files from your computer to the Related Docs page to upload files without clicking **Upload New Related Document** and selecting files.
Link New Related Document	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 **Link to File** 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.

3. *(Optional)* Click the document or image name to enter additional information about the document or image, or one of its versions, such as the file's name, whether the version is published, and author information.

> For files other than images, update the category and description information in the table directly on the Related Docs page.

4. Click **Apply** to save the document details.

To attach a related document to a deliverable or activity:

1. Display the project, select the **Stages** page, and click the name of the deliverable or activity.

   You can also access all documents assigned to you across multiple projects using the My Work page available on the **Workspace** menu.

2. In the Contents tree, click **Related Documents** to display the currently attached related documents.
3. Select how to add the related document.

Source Type	Description
Upload New Related Document	Select this option to upload the file to Accolade. Click and drag files from your computer to the details dialog box to load files without clicking **Upload New Related Document** and selecting files.
Link New Related Document	Select this option to link to an external file on the network or to a website. 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 **Link to File** 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.
Associate Related Documents	Select this option to associate a document that is already added to the project as a related document. Select the file(s) and click **Associate**. Workflow action owners who are not an assigned team member cannot associate existing project-level related documents to their assignments. However, they can upload or link to a new document, and edit details for documents associated to their assignments. This option is only available if a deliverable or activity is available to all user roles.

The files are added as related documents to both the deliverable or activity, and are listed in the Contents tree under **Related Documents**. The related documents are also added to the project and are listed in the project's **Related Docs** page.

4. *(Optional)* Click the document or image name to enter additional information about the document or image, or one of its versions, such as the file's name, whether the version is published, and author information, about the document, image, or one of its versions.

   Update the category and description information in the table directly in the Related Documents pane.

5. Click **Apply** to save the document details.

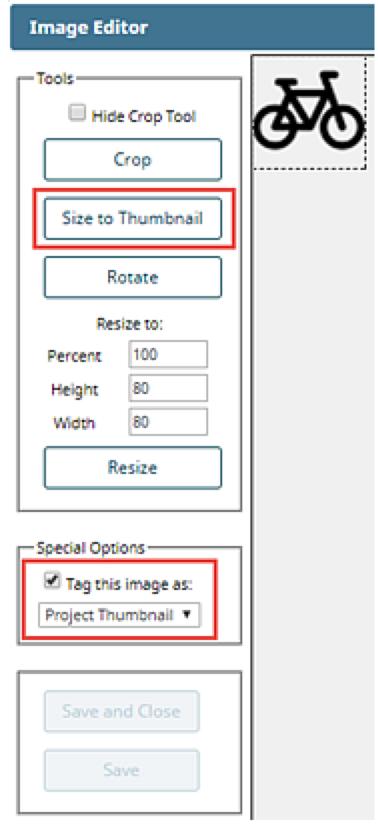
Notes:

- To delete all versions of a related document, select the **Related Docs** page, select the check box in the **Delete** column of the document you want to remove, and click **Apply**. To delete a version, click the name of the document to delete, and click **Delete**. If the **Protect Document Versions from Deletion** option is selected in the process model, you cannot delete related document versions.
- To display as an image within Accolade, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, jfif, or .png.
- Images added as related documents are available for use in rich text metrics. Images added to rich text metrics are automatically added to the **Related Docs** page.
- Related documents that contain Accolade field codes do not update data within Accolade when uploaded.
- Any related documents on a deliverable or activity that becomes hidden by conditions are moved to the project **Related Documents** page. If a deliverable or activity become visible again, the related documents on the deliverable/activity display.
- Documents and images added when a project is created or attached to an idea are added automatically to the resulting project as related documents.

Adding Project Thumbnail Images

Members of the project team can select a published image attached to the project to identify the project in Accolade. This image becomes the project's thumbnail image and displays in the upper left corner of the project to help easily identify the project, and is also included in other places with in Accolade such as the My Work page and reports that contain the Project Thumbnail column.

To add a project thumbnail to a project:



1. Display the project and click the **Related Docs** page.
2. In the **Images** section, click the image itself (not the image file name) to use as the project thumbnail.

   An image added to the project by linking to a file or web page cannot be used as the project thumbnail or main image. Only uploaded files can be tagged as project thumbnail in the Image Editor.

   To add a new image, see the Attaching Supporting Information to Projects, Deliverables and Activities topic in the online Help.
3. In the Image Editor, click **Edit**.
4. *(Optional)* Crop or re-size the image to make it the proper dimensions.

   To automatically size to thumbnail dimensions, click **Size to Thumbnail** in the **Tools** section.
5. In the **Special Options** section, select the **Tag this image as** check box and select **Project Thumbnail** from the list.
6. Click **Save** to save your changes.
7. Refresh the project page to display the image.

Notes:

- To display as an image within Accolade, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, jfif, or .png.
- Image quality may be improved if you upload an image that is already thumbnail size, avoiding the need to re-size it in Accolade.
- The **Project Main** image tag is intended for an image that can be inserted into a document to represent your project. Typically, the project main image will be a larger size than the project thumbnail.

Exercises - Attaching Supporting Information

Try out what you have learned!

- Open a project and attach a file as a related document.
- Attach an image file to the same project and assign it as the thumbnail image.
- From My Work, open a deliverable or activity assigned to you and create a link to a file available on your company's network.

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