Sopheon Accolade®

Process Design - Process Design Overview 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.

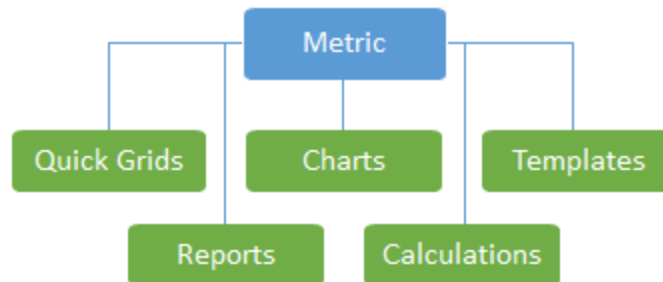| Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created 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.

Process Design Overview

Process Designers manage the design and configuration of Accolade, including the components introduced in this training module. This module provides a high level description of the purpose of each component, and how the components relate to one another.

Each component is discussed in more detail in the other training modules available in the Process Design learning track.

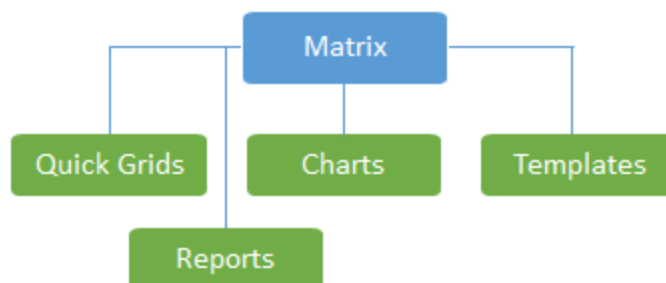## Data Points and Data Gathering Components

Accolade offers many ways to enter and to view data about a project and its current progress toward completion.

- **Metrics** - A metric is a measure of an aspect of a project, or product, and is unique to each company that implements Accolade. Metrics provide data and status and are available for inclusion in online forms, charts, reports, documents, and other places within Accolade. Use metrics to capture data, such as dates relative to project start and end dates, level of risk, or financial data such as project costs. Each company has their own set of data points that are important to their particular process flow. Use the various metric types to define and capture data points about all projects in your system.
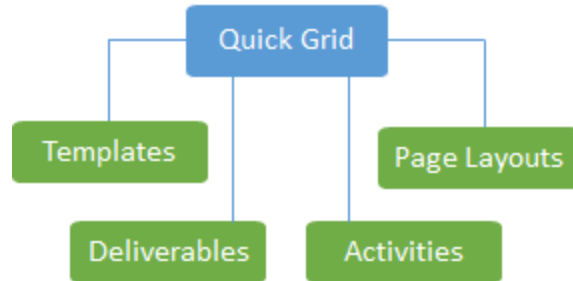

For information about creating metrics, see *Metric and Matrix Design and Usage*.

- **Matrices** - A matrix is a collection of metrics intended to model complex relationships between different data types. For example, a matrix could show how several aspects of project performance change over time. Matrices show how one or more metrics changes or is expected to change in relationship to changes in critical factors such as time or location. A matrix can also be a project management tool. For example, to assign action items to members of a project.
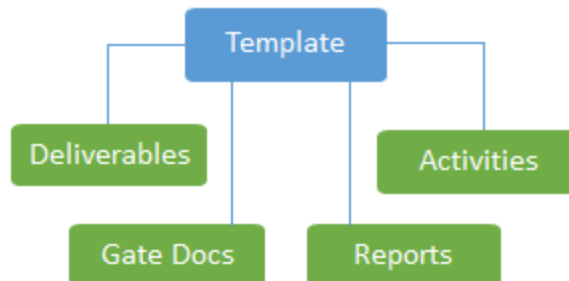
For information about creating matrices, see *Metric and Matrix Design and Usage* .

- **Quick Grids** - A quick grid is a collection of one or more customizable grids that is associated with a deliverable or activity that provides another location to enter information during a project. Quick grids are added to deliverables and activities in a process model, in much the same way as a template. Adding the appropriate metrics and other data collection points to a grid allows the assigned deliverable or activity owner to conveniently manage the metrics and data collection directly on the screen, without having to download a template, update the document and save the results to Accolade. Quick grids also allow other members of the project to view the specific metrics and data associated with each deliverable or activity in a read-only version of the grid.

For information about creating quick grids, see *Deliverable and Activity Design*.

- **Templates** - A template is the starting point for creating a deliverable, activity, or gate document, an MS Excel report or chart, MS Project schedules, and other documents. Using templates provides consistency across documents of similar type, and can provide additional information about what is required to complete within a document.

For information about creating templates, see *Deliverable and Activity Design*.

- **Reports** - Reporting in Accolade provides a means to summarize and analyze project and other data within your database, in a format and manner that is most applicable to your organization and data needs. Reports can range from user login attempts to much more complicated reports used to analyze projects and completion efficiency or financial information.

For information about designing reports, see *Designing Charts and Reports*.

Models for Repeatable Processes

A process model is a template of the process flow for the projects that use it. By designing a model, Process Designers ensure that similar projects follow the same process from start to completion. The goal of building models is to create a measurable, repeatable process that captures your company's best development practices. The processes are as unique as your company and the products and services you offer. Companies can create a library of models for different types of projects. For example:

- Process models that follow a classic Phase Gate process that takes a project from idea submission or discovery all the way through to product launch, including stages for development, testing and validation, and manufacturing.

- An express Phase Gate process model that includes an abbreviated version of the classic model.

- Idea process models that contain an idea submission stage and an idea evaluation gate that all ideas move through prior to moving to a development model.

- Process models for internal projects, such as Human Resource benefits open enrollment.

- Process models used for portfolio projects and that specify the model used for projects within the portfolio.

For information about creating process models, see the *Process Model Design* training module.

Configure the Accolade Site

Accolade provides the option to configure portions of the site so it better fits with your company terminology, location, and general application use. Process Designers can do the following:

- Add additional menu items that link to websites, FTP sites, email, local intranet sites, or files available on the company network.

- Add additional fields to deliverables, activities, user accounts, resource pools, and timesheets. Resources and timesheets are available in optional features available for Accolade.

- Design custom pages to display in projects or as menu items within Accolade.

- Define which metadata fields are included and where in deliverables and activities.

For information about these configurable aspects of Accolade, see the *Website Configuration* training module.

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