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# Sopheon Accolade<sup>®</sup>

## Process and Project Management - Managing Project Gates Training Guide

Version: 16.2



## About Sopheon Accolade®

<b>Document Name:</b>	Process and Project Management - Managing Project Gates Training Guide
<b>Document Version:</b>	1
<b>Software Version:</b>	Sopheon Accolade 16.2
<b>Document Date:</b>	February 2024

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# About the Accolade Education Program

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

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

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

The Accolade documentation suite contains the following additional components:

Document	Contents
<i>Sopheon Accolade What's New in This Release</i>	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.
<i>Sopheon Accolade Administrator's Guide</i>	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
<i>Sopheon Accolade Installation Guide</i>	Provides information about the installation of the application and its required databases.
<i>Dashboards for Accolade Installation Guide</i>	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

- Gate Manager

### Terms and Concepts

- Accolade Navigation
- Projects





### Related Training Modules


- Getting Started with Accolade
- Understanding Projects



# Evaluating a Project's Readiness for Gates

A project's readiness for the next gate meeting is determined by the completion of the required deliverables in the current stage.


Within the My Work page, the following icons indicate a project's status:

-  - All deliverables are set as **Complete** or **Not Required**. Projects that display with this icon are considered ready for the next gate meeting.
-  - The project is within the warning period before the gate meeting and one or more deliverables are not complete. The warning period is defined in the **Number of Days for Gate Meeting Warning** system parameter.
-  - One or more deliverables are set to in trouble.
-  - Conditions for the previous gate still must be met.


In addition, anyone with access to the project can view a list of deliverables and their current completion status in the project itself on the **Stages**  page. View the stage and review the status within the **Status** column.



-  Process Designers can add a Gate Readiness pod to a page layout and add the layout to the project to provide a graphical view of the percentage of work in the current stage that is completed, in progress, or not started. Depending on your system's configuration, you may be able to view a gate readiness graph on the **Project Home**  page.

## Flagging Projects as In Trouble

If there are a large number of deliverables that are not yet ready for an approaching gate meeting, a Process Manager with Manage Process rights and the assigned Project Manager can set an entire project as being in trouble, instead of individual deliverables. If the project is flagged as in trouble, the  displays next to the project name in the Upcoming Gates page, the My Work page, and in the upper right corner of the project header as well as in Search.

### To flag a project as In Trouble:






1. Display the project.
2. Click  in the upper right corner of the page and select **Manage "In Trouble" Flag**.
3. Select the **In Trouble** option to mark the project as in trouble.
4. Enter a note about why the project is in trouble and select the reason.
5. Click **OK**.

Manage the flag by clicking  in the upper right corner of the project header. When a project is no longer in trouble, click  in the upper right corner of the project page, select **Manage "In Trouble" Flag**, and clear the **In Trouble** option.






# Moving Projects Through the Phase Gate Process

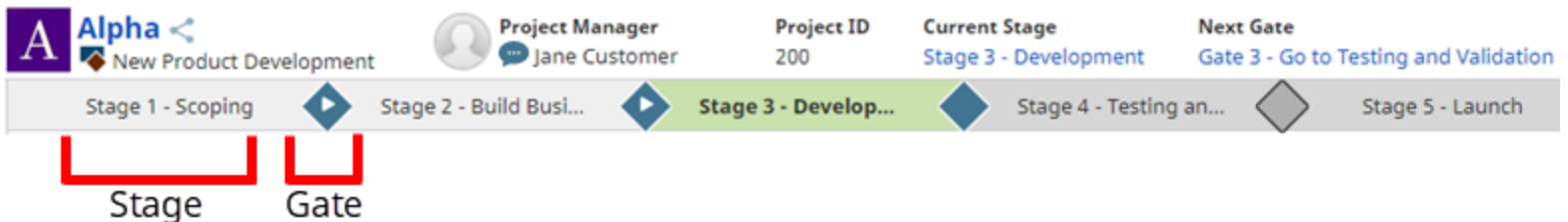
In gated projects, the model graphic (like the one below) shows where the project is in its process and allows you to go to any phase (or stage) or gate in the project by clicking its icon or the stage or gate name.

The shading and icons within the graphic are configurable through each process model's definition. The default model uses the following shading and icons:

-  - Completed stages or the stage that is currently in progress if it is the furthest most solid stage in the model.
-  - Future stages.
-  - Stage is locked for editing.
-  - The next gate meeting.
-  - Future gates.

In addition, the gate icons can include badges to indicate the state of the gate decision. These are also configurable through each process model's definition. The default badges include the following icons:

-  - The gate has a Go decision.
-  - The gate has a Go decision with conditions attached.
-  - The gate that is currently on hold.
-  - The gate is being recycled to the previous stage.
-  - The project was stopped, or killed, at this gate.



The process graphic is fully configurable and may look different for each project.

## Indicating Stage Completion and Readiness for Gates

A project's readiness for the next gate meeting is determined by the completion of the required deliverables in the current stage. When all deliverables for a gate are either complete or indicated as not required, a stage is considered complete and ready for the gate meeting. Users with access to the project can quickly review the status setting for all deliverables in the project on the project's **Stages** page. Status is also available on the **Upcoming Gates** and **My Work** pages. See "[Evaluating a Project's Readiness for Gates](#)" on page 6 for more information.

## Advancing Projects to the Next Stage

Process Managers, Idea Managers, and Gate Owners enter the decision for a gate to advance the project to the next stage. Consider locking the current or past stages as described in the section below.

### To advance a project to the next stage:

1. Display the project.
2. Click the gate icon in the process model graphic to display the gate details.
3. In the **Gate Decision** field, select **Go**.

If the project ends in a gate, and you enter a **Go** as the gate decision in the last gate, the project is no longer visible in the Work pod on **My Work**.

If the **Disable Conditional Go Gate Decision** system parameter is disabled, **Conditional Go** is also an option to advance the project to the next stage. **Conditional Go** indicates that the gatekeepers approved the continuation of the project under a certain set of conditions. **Conditional Go** gate decisions must be changed to **Go** before a decision can be entered for the following gate.

**Conditional Go** is not an option in the final gate because there are no following gates where conditions can be met.

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

## Locking and Unlocking Project Stages



Process Managers and Idea Managers with Manage Process rights, and the assigned Project Manager can lock the stage to prevent anyone from changing the deliverables, activities, or resource demands within that stage. Keep the following in mind prior to locking a project stage:


- Workflows that are in progress when a stage is locked remain with a status of in progress, and user's assignments continue to display in the Work pod on the My Work page; however, the workflow can no longer progress because the action owners cannot make any changes due to editing limitations in the locked stage.
- Items not linked to a specific stage, such as metrics, related documents, discussions, and so forth, are not affected when a stage is locked.



- Finish dates from Microsoft Project are not transmitted to the deliverables and activities in locked stages.
- If your project is using Accolade's integration with Microsoft Project, locking the stage that contains the Project plan prevents additional updates to the plan.
- Deliverable and activity conditions only apply in current or future stages. Completed stages and locked stages in projects are unchanged.

#### To lock a stage:

1. Display the project and click on the **Stages**  page.
2. *(Optional)* If you need to lock a previous stage, click the stage in the process model graphic to display the details for that stage.
3. Click on the **Lock Stage**  , located on the action bar.

To unlock the stage, click on the **Unlock Stage**  icon.

## Canceling or Stopping Projects

When gatekeepers decide to discontinue a project, Process Managers, Idea Managers, and Gate Owners can change its gate decision within the gate details to reflect that decision. The record of this project having been canceled or stopped remains in the database (until the project is deleted), and allows reporting on how many projects are canceled or stopped at each stage of the development process.

#### To stop or kill a project:

1. Display the project.
2. Click the gate icon in the process model graphic to display the gate details.
3. In the **Gate Decision** field, select **Kill**, or your company's equivalent, such as **Canceled** or **Stopped**.
4. Click **Apply** to save your changes.

After recording the gate decision, complete any termination reports or processes and then close the project if it is unlikely to resume.

#### Notes:

- Stopping or placing a project on hold inactivates the resource demands for the project, removing them from resource availability calculations. Resource Planning is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support.
- A gate can be automatically set to **Go** through project migration. If you migrate a project to

any gate after the first, all gates before the gate that you migrate to in the migrated project are set to **Go**.

## Manage and Vote on Gates Overview

If a project uses a gated model, the project contains one or more gates, which are points in the process where decisions are made about whether to continue to the next phase of a project. The project team assembles the deliverables from the stage leading up to the gate and those who are responsible for making the decision use the information to decide whether to continue the project, put the project on hold, gather more information prior to making a decision, or to cancel work on the project.

### Gate Participants

Gates and the events leading up to a gate meeting include the following project team members:

- **Gate Owner** - Gate owners schedule gate meetings including the appropriate gatekeepers, and ensure that all the deliverables and gate documents are ready prior to the gate meeting. For gates they own, gate owners can modify gate details, modify gate documents, change gatekeepers, and enter gate decisions.

The Process Manager with Manage Process rights assigns the gate owners for each gate at the project level. The model can also contain a default gate owner. A gate owner can be any of the following:

- A user assigned the Gate Manager user role.
- A user assigned the Process Manager user role with Manage Process rights at the access group level.
- **Gatekeeper** - During gate meetings, gatekeepers make decisions for their functional area about whether the project is ready to move on to the next stage. The functional areas that apply to each gate are assigned in the process model. The process model can also contain users assigned to each function that populate in each project that uses the model.

The gate owner for a gate can change the gatekeepers for gates that they own or choose to not include a gatekeeper in a particular gate meeting. Gatekeepers must be assigned the Executive user role.

### Gate Decisions

Gate decisions can be captured in the following ways:

- **Manually with no voting options** - The gate owner enters the gate decision to advance the project to the next gate.
- **With gatekeeper voting** - Gatekeepers enter an approval or rejection decision for a pending gate decision. Within the process model, gatekeeper voting can be set to skip a gatekeeper, for example, if they are absent or are not required for a particular project, and set to move a project to the next stage if a unanimous Go or Conditional Go decision is made.

- **Automatically using metric conditions** - Gate decisions can be set automatically based on metric conditions defined in the process model for a gate, or metrics conditions defined in an automated step in a workflow that is part of the stage before a gate.

## Setting Gate Meetings


Set gate meetings to keep gatekeepers and project team members informed about upcoming gate activities. After a gate meeting is set, Accolade sends warning when deliverables are overdue.

Gate owners set meetings for the gates they own. Process Managers and Idea Managers with Manage Process rights to the project can also set gate meetings, even if a gate owner is assigned.

- 💡 To enter or modify only the gate date and not set meeting details, access a project and click a date or **[None]** below the gate icon in the project's process model graphic.


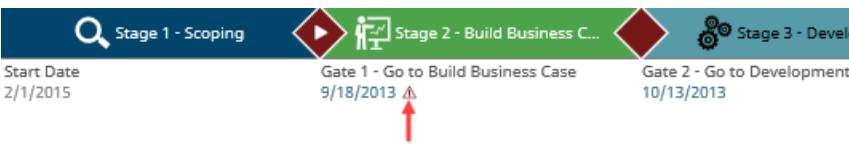
### To set a gate meeting from the standard Gates page:

1. Display the project whose gate meeting you want to set.

- 💡 Reverse the sort order for the **Meeting Date** field by clicking  on the Work pod in the **Upcoming Gates** page (or where the Work pod is displayed) and adjusting the **Sort** field to find projects whose next gate meeting is not yet scheduled.

2. In the process graphic, click the icon for the appropriate gate.

3. Complete the following information for the meeting:

Field	Description
<b>Meeting Date</b>	<p>Select a date from the displayed calendar, or manually enter a date in the field. A gate date can also be set using a calculated metric defined in the process model. Gate dates that have been manually overwritten display with  next to the date in the process graphic to indicate the date was manually updated.</p>  <p>To recalculate a gate date after a manual override, click <b>Recalculate</b> next to date in the <b>Meeting Date</b> field on the <b>Gates</b> page.</p>
<b>Meeting Place</b>	Enter the name or description of the location of the gate meeting. For example, the conference room in which it is scheduled to take place.
<b>Notes</b>	Enter any additional information about the meeting to inform gatekeepers and others of any useful reminders or changes.

4. (Optional) To add or replace a gatekeeper for a single gate meeting, in the Gatekeepers section, click the name of the gatekeeper to replace, or click **[None]** if a gatekeeper is not specified.

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.

Click **Done** to exit the dialog and return to the gate details.

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



#### To set a gate meeting from a project-specific page:

**Note:** The procedure outlined below assumes use of the default system gates layout titled **Project Gates**. This page may vary across Accolade implementation and may be customized to your company's specific needs.

1. Display the project whose gate meeting you want to set.
2. Identify the project page that contains the gate meeting information.

This may be included on the active gate page. Click the gate icon in the process graphic to access the active gate or navigate to the **Project Gates** page.

3. Navigate to the **Gate Information** pod to and complete the following:

Field	Description
<b>Gate Meeting Date</b>	<p>Select a date from the displayed calendar, or manually enter a date in the field. A gate date can also be set using a calculated metric defined in the process model. Gate dates that have been manually overwritten display with  next to the date in the process graphic to indicate the date was manually updated.</p>  <p>To recalculate a gate date after a manual override, click <b>Recalculate from metric value</b>.</p>
<b>Meeting Place</b>	<p>Enter the name or description of the location of the gate meeting. For example, the conference room in which it is scheduled to take place.</p>

Field	Description
<b>Notes</b>	Enter any additional information about the meeting to inform gatekeepers and others of any useful reminders or changes.

4. *(Optional)* In the **Notes** pod, enter any additional information about the meeting to inform gatekeepers and others of any useful reminders or changes.
5. *(Optional)* To add or replace a gatekeeper for a single gate meeting, in the Gatekeepers section, click the name of the gatekeeper to replace, or click **[None]** if a gatekeeper is not specified.

In the Select a User dialog, select a new gatekeeper from the list.

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.
- Click **Clear** to set the gatekeeper assignment to **[None]**, so no user is assigned as the gatekeeper.

Click **Done** to exit the dialog and return to the gate details.

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

**Notes:**

- Process Designers add functions to gates in the process model. If no functions are specified in the process model for gates, you cannot assign gatekeepers to a gate meeting. If there are no functions listed in the Gatekeeper section, the model does not contain functions for the gate.
- Project Managers can assign gatekeepers to a function so they are assigned by default for each gate meeting.
- Gate dates can be set automatically when workflows assigned to deliverables are completed. The workflow must have an automated step to set the gate date upon workflow completion. See the online Help to learn more about automated workflow steps.
- A setting in the process model determines if the content on the Gate page can be edited.

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## Exercises - Set a Gate Meeting

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Try out what you have learned!


- Navigate to a project home page you have access to.
- Access a gate by clicking the icon for the appropriate gate in the process graphic.
- Enter a gate meeting date.
- Supply a meeting place, notes, and a proposed meeting decision.

## Completing Gate Documents

A gate document may exist as a template or a version that the assigned gate owner downloads and makes modifications to prior to saving back Accolade.



Gate documents can consist of check lists, references, or other key information required for capture before, during, or after a gate meeting.



**To complete a gate document from a project-specific page:**

1. Display the project and navigate to the **Project Gates**  or project-specific page that contains the gate documents.
2. Click the gate document name to display its details and version information. The information displayed is dependent on the [document type, and your ownership and responsibilities](#) to the document.
3. Do one of the following:
  - **Create version from template** - Click the file type icon next to the file name in the **Template** section to download the template. You can download the template at any time by clicking the file type icon in the file.
  - **Create version from existing version** - Click the file type icon next to the document version you want to download in the **Gate Document Version Details** section.

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

4. Update the document as necessary and save it to location where you can find it easily.
5. Save the document as a published or unpublished version back to Accolade.

Source Type	Description
<b>Upload New Version</b> 	Click <b>Upload New Version</b> and select the file to upload to Accolade.   Click and drag files from your computer Windows Explorer to the dialog box to upload files immediately.



Source Type	Description
<p><b>Link New Version</b></p> 	<p>Click <b>Link New Version</b> to link to an external file on the network or to a website. Enter the directory path to the file and click <b>Link</b>. 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.</p> <p> 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.</p>
<p><b>Save directly from a Microsoft application</b></p>	<p>If you have the Accolade Office Extensions add-in, save a version of the file back to Accolade using the <b>Save to Accolade</b> option on the application's <b>File</b> menu.</p>

- In the **Versions** section, enter any comments regarding the versions, such as what has changed.
- 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.

- Click **Apply** to save the document upload.

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

 To delete a version, select the check box in the  column and click **Apply**.

**Notes:**

- Process Managers and Idea Managers with Manage Process rights can create versions of gate documents if a gate owner is not assigned to the gate.
- A setting in the process model determines if gate information can be edited.


## Removing Documents from Gate Meetings

For some stages in the project, there may be deliverables that contain information that must be gathered or saved but that is not necessary for the gatekeepers to review at a gate meeting. Or, you

might want to remove a deliverable from a certain gate if the situation makes it unnecessary. Set these documents as **Not Required** within the stage to remove these documents from gate meetings.

The **Allow "Not Required" status for deliverable** option must be set for the deliverable on the process model to set the deliverable status to **Not Required**.

#### To remove a document from a gate meeting:

1. Display the project and select the **Stages**  page to display all deliverables and activities in the stage.
2. Identify the document in the list that you want to remove from the gate meeting.
3. In the **Status** list, select **Not Required**.

If the **Not Required** status is not available, the document is required and cannot be removed from the gate meeting.

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

#### Notes:

- If you are using Accolade's integration with Microsoft Project, the document owner of the Microsoft Project plan for the project also has the right to change the status of deliverables and activities through the project plan.

## Reviewing Upcoming Gates and Gate Details

If you are assigned to one or more gates, review details about upcoming gate meetings to ensure projects are ready for their gates, and that you are prepared for gate meetings. To help manage and prepare for gate meetings, Accolade offers several locations to view gate materials. How you access gate information can depend on your assigned user role and your gate assignments.


- **Upcoming Gates** - Users assigned the Executive, Process Manager, or Gate Manager user roles can access a list of gates that they own using the **Upcoming Gates** page available from the **Workspace** menu. This page uses the Work pod to display gate information. Work pods located in other areas of Accolade can also be configured to display gates.
- **Gates page on projects** - Depending on your system's configuration, the project gates page may be a custom page layout where users can view gate details, enter gate meeting decisions, upload and edit documents relating to the meeting, and view gate-specific history. This information is displayed in pods and can be accessed by clicking the gate icon in the process graphic or page layout titled **Gates**.

Within each of these pages, you can find the following information and link to the project details, such as gate meeting notes, gate documents, and gatekeeper information directly from the page:

- Projects that have a scheduled gate meeting and the meeting's date.
- Projects that are ready for their next gate meeting, but the meeting has not been scheduled.





Click  on the **Upcoming Gates** page to filter and sort the gates that display and to change the order in which they display.

- Projects that may be in danger of not meeting their scheduled dates. Use the icon legend on the page to identify the project's current state of readiness for the next gate. On the **Upcoming Gates** page, hover your mouse over the icon for more information.

#### Notes:

- All users with access to a project can view gate details, such as gate meeting location and time, gate documents, and gatekeeper information directly from the project pages. Click the gate icon in the process graphic within a project to display the gate's detail information.
- Click the name of the next gate on the **Upcoming Gates** page to open the **Gates** page of the project to display more information about the next gate.

## Entering Gate Meeting Decisions

Gate meeting decisions are what determine if work on a project continues to the next stage. Gates with decisions set to **Go** or **Conditional Go** move forward in the process.

Gate owners record gate meeting decisions in the gate details within the project. Process Managers and Idea Managers with Manage Process rights can enter gate decisions, even if a gate has an assigned owner. Depending on your company process and the project:

- Gatekeepers may vote on their own about a proposed meeting decision, with or without a meeting being held. In this case, gate owners set the proposed decision on which the gatekeepers are to vote.
- Gate decisions may be determined and recorded based on metric conditions set for the gate in the model. If a gate decision is entered manually, the automated gate decision does not override the manually entered decision. To apply the automated gate decision if a decision has been entered manually, click **Recalculate** next to the gate decision field.

### To enter a proposed gate decision for gatekeeper voting:

**Note:** Proposed gate decisions only apply if gatekeeper voting is enabled in the model for the gate.

1. Display the project whose gate meeting decisions you want to enter.
2. In the process graphic, click the icon for the appropriate gate.
3. In the **Proposed Gate Decision** field, select the gate decision on which the gatekeepers are to vote.

Depending on your system configuration, the proposed gate decision might be located in a tile or area of the page. Navigate to the project-specific page containing gate decision information.

Click the **Proposed Gate Decision** field and select the appropriate gate decision:

- **Go** - Approval has been given to proceed to the next stage.
- **Conditional Go** - The project can proceed, but one or more conditions must be met before a **Go** or **Conditional Go** decision can be entered for the *next* gate meeting. If **Conditional Go** is selected as a gate decision, the gate owner must confirm that the conditions have been met and the decision in the *previous* gate must be changed to **Go** before a decision of **Go** or **Conditional Go** can be entered for the next gate.

**Conditional Go** is not an option for the final gate when the project ends in a gate because there are no further conditions that can be met in the project.

- **Kill** - The project was ended.
- **Hold** - The project was stopped but may be resumed at a later date.
- **Recycle** - The current stage will be repeated.
- **Pending Decision** - The gate meeting has not been held or no decision was reached.

**Note:** If the previous gate decision was **Hold** or **Recycle**, and you want to propose the same gate decisions again, select **Hold (Again)** or **Recycle (Again)** in the **Proposed Gate Decision** field. If voting approves the gate decision, **Hold** or **Recycle** displays as the recorded gate decision.

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

#### To record a gate meeting decision:

**Note:** If gatekeeper voting is enabled and set to automatically set the gate decision when there has been a unanimous vote, gate owners do not need to record the meeting decision. It is entered automatically.

1. Display the project whose gate meeting decisions you want to enter.
2. In the process graphic, click the icon for the appropriate gate.
3. In the **Gate Decision** field, select the gate decision that was reached at the gate meeting.



Depending on your system configuration, the proposed gate decision might be located in a tile or area of the page. Navigate to the project-specific page containing gate decision information.

Click the **Gate Decision** field and select the appropriate gate decision.


- **Go** - Approval has been given to proceed to the next stage.
- **Conditional Go** - The project can proceed, but one or more conditions must be met before a **Go** or **Conditional Go** decision can be entered for the *next* gate meeting. If **Conditional Go** is selected as a gate decision, the gate owner must confirm that the conditions have been met and the decision in the *previous* gate must be changed to **Go** before a decision of **Go** or **Conditional Go** can be entered for the next gate.

**Conditional Go** is not an option for the final gate when the project ends in a gate because there are no further conditions that can be met in the project.

- **Kill** - The project was ended.
- **Hold** - The project was stopped but may be resumed at a later date.
- **Recycle** - The current stage will be repeated.
- **Pending Decision** - The gate meeting has not been held or no decision was reached.

 Click  in your Upcoming Gates page to update a gate decision from **Conditional Go** to **Go**. You can also update the previous gates **Conditional Go** decision using the **Conditions for Previous Gate** option in the next gate in the project. If gatekeeper voting is enabled, changing the decision to **Go** requires a vote from the gatekeepers.

4. If the decision is **Conditional Go**, enter a description of the conditions for the gate in the **Conditions** field.
5. *(Optional)* To skip a gatekeeper vote decision, click **Skip Gate Vote** to record that their vote has been skipped for the gate.

Skipped votes are treated as approvals for setting the decision of the gate. The ability to skip a gatekeeper's vote is set in the gate within the model. If recording gate decisions from a project-specific page, click  to skip a gatekeeper's vote and click the icon again to reverse the skip action. Reversing the skip allows gatekeepers to enter votes on the gate decision.

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

#### Notes:

- Gate decision names, such as **Go** and **Hold**, are configurable and may differ for your Accolade installation. See your company's Process Designer for the names your company uses for these decisions.
- The **Conditional Go** gate decision may not be available in your installation if the **Disable Condition Go Gate Decision** system parameter is enabled.
- A setting in the process model determines if gate information can be edited.

## Assigning Gate Owners to Gates

Gate owners schedule gate meetings including the appropriate gatekeepers, and ensure that all the deliverables and gate documents are ready prior to the gate meeting. Process Designers can set the project manager or the project creator as the default gate owner in the process model. Process Managers with Manage Process rights can assign or change the gate owner for each gate in the project.

Only users with the Gate Manager user role or the Process Manager or Idea Manager user roles are available for selection as gate owners.

#### To assign a gate owner to a gate:

1. Display the project and click the gate icon to display the gate details.
2. In the **Gate Owner** field, do one of the following:

- If a gate owner is not assigned, click **[None]**.
  - If a gate owner is assigned, click the existing gate owner's name.
3. In the Select a User dialog, select the gate owner from the list.
- 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.
4. Click **Done** to exit the dialog.
5. Click **Apply** to save your changes.

**Notes:**

- To remove a gate owner from a gate, click the existing gate owner's name in the **Gate Owner** field and click **Clear** in the dialog.

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