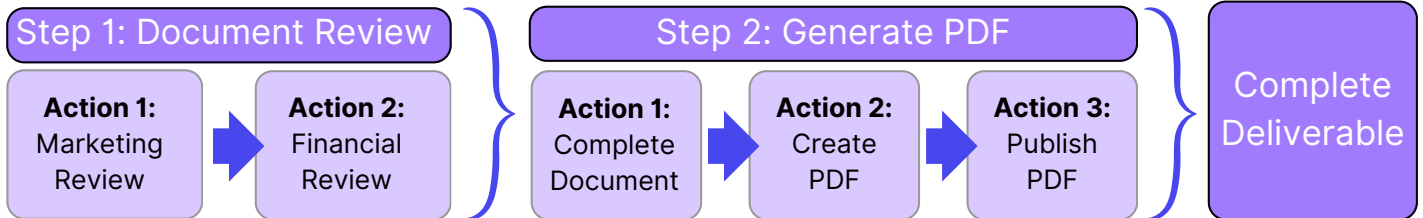# Accolade

Accolade Collaborative Workflow Quick Reference


↻ Displays **recently accessed** items   ? Displays **help content** for the current page

Workflows contain steps and actions help to complete deliverables and activities.

Viewing and Completing Your Workflow Actions

View and complete the active workflow actions assigned to you in two places.

- Workflow page
- Individual deliverable or activity

Access individual workflows on deliverables or activities from the **Contents Tree**
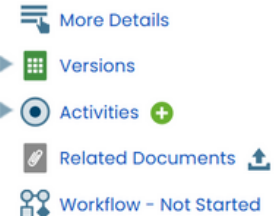
Workflow Decision Types

Complete workflow actions and enter decisions that determine the progression of deliverables and activities in the stage-gate process.

- Select a decision for the workflow action, moving the deliverable forward or keeping it stagnant.
- ✓ Approves the deliverable.
- 🚫 Rejects the deliverable.
- ⏩ Skips a workflow action.
- ⊘ Declines the request to review the deliverable or document.

Managing Workflows in Projects

Starting Workflows
1. Navigate to the project deliverable or activity containing the workflow.
2. In the **Contents Tree**, click the workflow and click **Start Workflow**.

Stopping Workflows
1. Display the project and stages page and identify the deliverable or activity that contains the workflow.
2. In the **Contents Tree**, click the workflow to display its details and click **Stop Workflow** in the bottom right corner.
- ***Note:*** *When a workflow concludes successfully, it stops automatically.*

Adding Workflows to Deliverables and Activities
1. Display the project and stages page and identify the deliverable or activity to add the workflow to.
2. In the **Contents Tree**, click **More Details** and click in the **Workflow** field.
3. Select an available workflow and click **Set Workflow**.
4. Click **Apply** to save your changes.

Skipping Workflow Actions
Only actions defined as being able to skip within the workflow definition can be skipped. Skip from:
1. **Workflow Page**
   - Click ⏩ to skip the action and **Apply** to save your changes.
2. **On the Deliverable or Activity**
   - In the **Contents Tree**, click the workflow and click **Skip** in the appropriate action row.

Workflow Action Ownership
Assign or delegate workflow actions to users by updating the workflow action owner.
1. Navigate to the workflow action you want to delegate on the project or the **Workflow** page.
2. Click the user name in the **Owner** column. Select the user to make the new workflow action owner.
3. Click **OK** or **Set User**, and **Apply** to save changes.

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