Accolade

Accolade Planning and Roadmapping Quick Reference

Accolade   Workspace   System   Resource   Planning   Dashboards   VOL Global Links   + Add New   Q Search   ⑦   🔔

Accessing Planning and Roadmapping Components

Planning
Planning Board
Casual Shoe Launch by Confidence Level

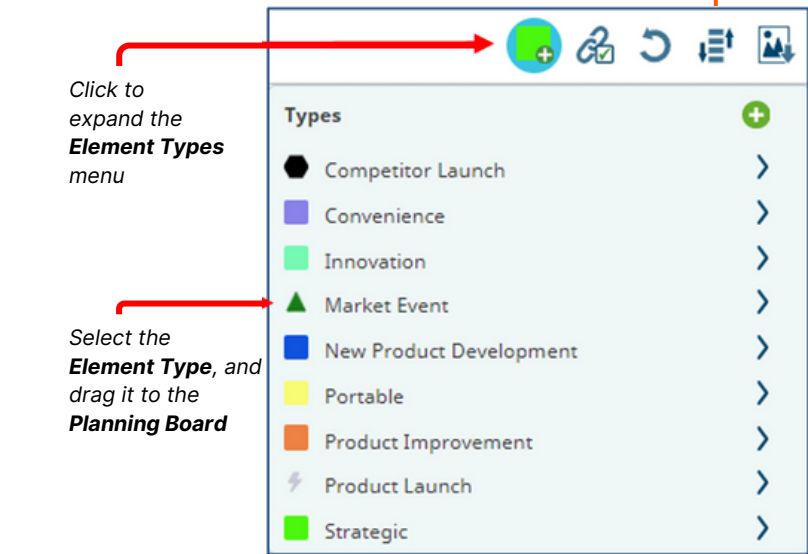*Access planning and roadmapping using the* **Planning Board**
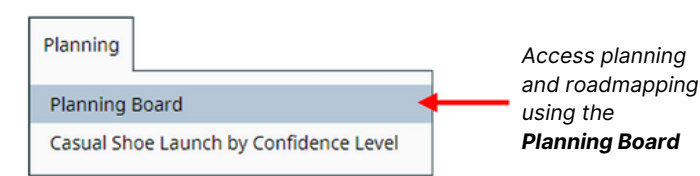
The **Canvas** view displays by default. Use the following options to access the different planning and roadmapping components.

- 🔲 **Expand** to select or create a different view type.
- 🟣 **Expand** to select or create a different element type.
- 🔗 **Click** to display relationships in the current view.
- ↕️ **Sort** elements alphabetically in the Canvas view.
- 🖼️ **Download** an image of the current view.

Working with Planning Elements

Adding Planning Elements
*Required: Planner + Process Manager with Add Project rights*

Click to expand the **Element Types** *menu*

⊕   🔗   ↺   ↕️   🖼️

Types	⊕
⬛ Competitor Launch	›
🟪 Convenience	›
🟩 Innovation	›
🔺 Market Event	›
🟦 New Product Development	›
🟨 Portable	›
🟧 Product Improvement	›
⚡ Product Launch	›
🟩 Strategic	›

Select the **Element Type**, *and drag it to the* **Planning Board**

Additional Roles & Rights Required

Details	Process Manager with Manage Process *(or)* Assigned Project Manager
Metrics	Process Manager with Manage Process *(or)* Assigned Project Manager
Team	Process Manager with Manage Team *(or)* Assigned Project Manager
Security	Process Manager with Manage Process
Links	View only to all Planners with element access

Navigational Components That Are Always Available

- 🔄 Displays **recently accessed** items
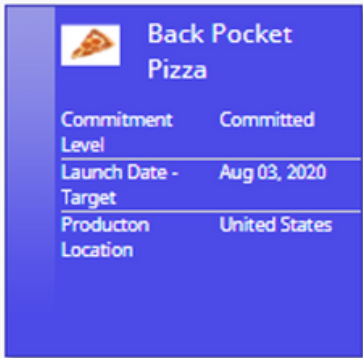- ⑦ Displays **help content** for the current page

Additional actions:
- **Access** your user profile
- **Set** the current page as your **Home**
- **View** the Accolade version
- **Log** out of the system

    Search - Enter text to search for projects and documents

    Menu - Access main level pages. Some menus may link to outside pages.

User Name
My Profile
Set as Home
About
Logout
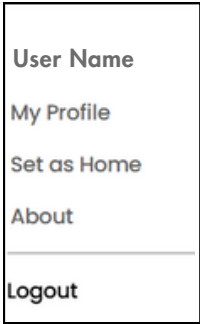
Viewing and Editing Element Details and Information

Hover over the element and click   to view or edit the following details:

- Enter the element's details or metric values.
- Change the project thumbnail image.
- Add or remove team members.
- Configure phase information.
- Display project relationships or dependencies.
- Set planning element security.
- Delete the element.

🍕	Back Pocket Pizza
Commitment Level	Committed
Launch Date - Target	Aug 03, 2020
Production Location	United States

Hover over the element and click the following for additional options:

- ⊞ **Display** the project description and selected metric values.
- 📌 **Pin** the element details to the view.
- 🔗 **Display** or **modify** the current project relationship links.
- 📊 **Display the Time View** for the project.
- 🗂️ **Display the hierarchy** of related projects.
- ⬇️ **Display the related** child projects.

Moving Up the Hierarchy

1. Click ⬆️ at the top of the **Planning Board**. The last item in the tree is the currently displayed board.
2. Select a level in the tree to navigate to that board.

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Working with Planning Views

Options Available in Both Grid and Gantt Views

⚙️ **Set display settings** for the view.
🔽 **Refine** which elements are included in the view. Available on select fields.
📝 **Create annotations** and notes in views.
[Save] **Save a view** with the current settings.

Managing Gantt Views
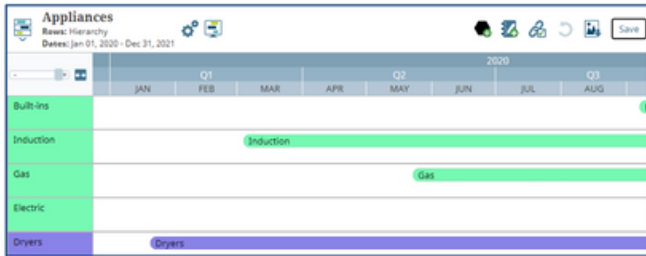
Changing Element Metric Values or Dates in the Gantt
- If the vertical axis is a list metric, drag and drop an element to another swim lane to update metric value.
- Hover over the left or right end of an element until cursor changes to ↔. Click and drag to a new date.
- Drag and drop an element to a new location.
- Hover over the element and click 📋 to change the metrics or dates in the element details.

Changing the Scale of the Gantt View
Use the slide bar to select the zoom level to display the time intervals closer or farther apart. Click ↔ to adjust displayed view to fit maximum horizontal screen width.

Managing Grid Views

Changing Element Metric Values or Dates in the Grid
- If an axis is a metric or a date, drag and drop an element to a cell in the grid to update its value.
- If an axis is a metric or a date, drag and drop the element to a cell in the grid to update its values in the element details.
- Hover over the element and click 📋 to change the metrics or dates in the element details.

Configuring Time Frames for Date Grids
1. Click ⚙️ to open **Edit Planning Grid Settings** dialog.
2. Click ⚙️ next to the axis field you wish to change.
3. Select the period and quantity of period to display.
4. Enter the starting date and click **OK**.
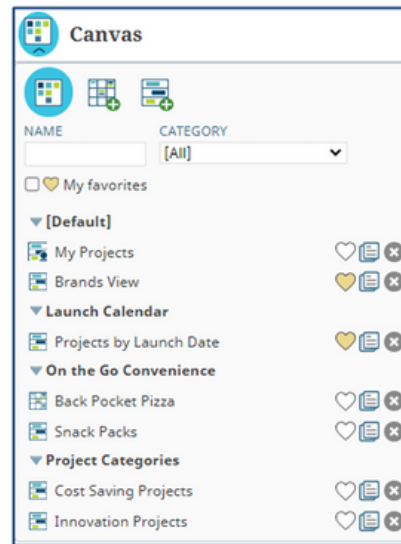
- Composite View
- Shared/Public View
- Scenario View
- Copy a Saved View
- Delete a Saved View

Displaying Gantt View in Presentation Mode
Click 🖥️ to display the view without the navigation and Accolade menu and title bars.

Applying Element Legends to Planning Views
1. Click ⚙️ to access the view's display settings.
2. In the **Border** and/or **Fill** fields, select a metric define with colors to apply a legend to the view.
3. *(Optional)* In the **Show Legends** section, select the **Border** and/or **Fill** check boxes to include interactive legend(s) within the view.

Elements are shaded or border colors added based on their setting for the metric.

Creating and Displaying Relationships

Creating Links Between Elements at Any Level
1. Display the **Planning Board**.
2. Enter text in the Quick Search in the title bar.
3. Click 🔗 next to the project and drag the line to another project in the search results, or to an element displayed in the **Planning Board**.
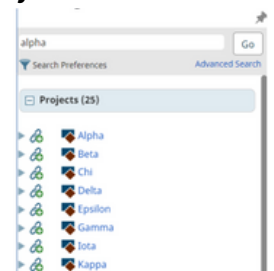
Creating Links Between Elements in the Same Board
1. Click 🔗 and select **Create**.
2. Click and hold on an element until the cursor changes to ⬡.
3. Drag the line to the related element.
4. Select the relationship type and click **OK**.

Displaying Links Between Elements
1. Click 🔗 and select **Manage** to open the dialog in any view.
2. Select **Show all lines, elements, and levels** to view all relationships, or select specific elements, relationships, and/or hierarchy levels to view.
3. If necessary, review and resolve any relationships conflicts.
4. Customize how the relationship lines are displayed, and to add a line legend to the view.
5. Click **OK** to view the relationships.

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