Accolade

Accolade Process Model Design Quick Reference

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

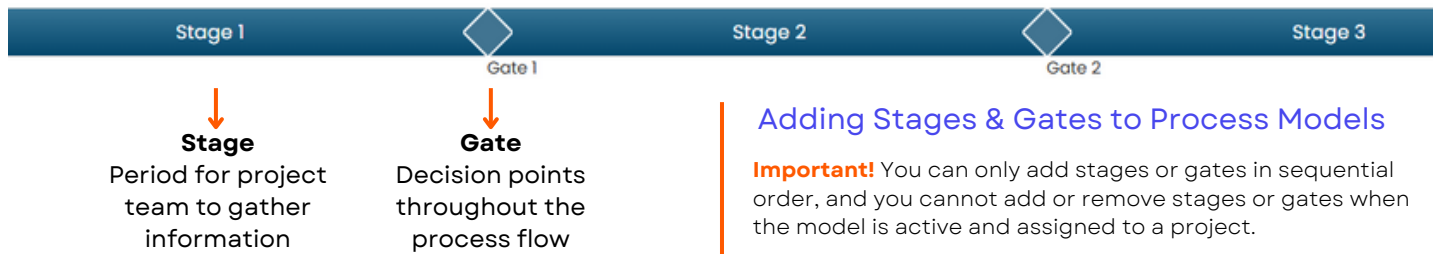## Navigational Components That Are Always Available

🕐 Displays recently accessed items.

❓ Displays **Help** content for the current page.

Search - Enter text to search for projects and documents

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

| **User Name** |
Access your user profile ·········	My Profile
Set current page as Home ·········	Set as Home
View the Accolade Version ·········	About
Log out of the system ·········	Logout

| Stage 1 | ◇ Gate 1 | Stage 2 | ◇ Gate 2 | Stage 3 |

Stage
Period for project team to gather information

Gate
Decision points throughout the process flow

Creating Process Models

Access process models to add or edit deliverable and activity configuration, migration maps, and project display properties.

You may also configure your process model to define metrics and matrices, reports, classes, links, extended fields, and other configurable parts of Accolade.

Creating Classes

Classes group process models into categories that share similar process types and characteristics. The primary different between classes is the process model type.

- **Gated** - Follows the classic Stage-Gate Process. Includes one or more sets of stages and gates.
- **Non-Gated** - Includes one stage but no gates.
- **Idea** - Used for Accolade Ideas. Can contain one or more stages and gates.

Note: Classes determine if a model can use stages or gates.

Creating or Updating Process Models

1. Click **Add New** or click the model name to edit.
2. If adding a new model, select the class that determines if the model is gated or non-gated.
3. Complete or update model properties in the Process Definition to define display and behavior for projects.
4. Ensure the model is active and click **Apply**.

Note: The class and other project details display above the process model graphic in each project.

Adding Stages & Gates to Process Models

Important! You can only add stages or gates in sequential order, and you cannot add or remove stages or gates when the model is active and assigned to a project.

1. Add a new model or click a model name to edit.
2. In the model tree, click 🟦 or 🔶 to add components.
3. Complete the necessary information.
4. Continue adding stages and gates as necessary in the order in which they are to be completed.
5. Click **Apply** to save your changes.

Adding Deliverables & Activities to Model Stages

1. Add a new model or click a model name to edit.
2. Select the stage to add the deliverable or activity.
3. In the model tree, click 📋 or 🔵 to add components.
4. Complete the deliverable or activity properties, adding templates, quick grids, or other Accolade components.
5. Click **Create** or **Apply** to save your changes.

Adding Gate Documents to Model Gates

To add gate documents, follow the steps to add deliverables or activities to stages.
Next, select the gate to which the gate document applies and click 🔶 in the model tree.

Adding Custom Pages

If there are active page layouts defined (see next page), you can select to add one or more of those layouts to a model as custom pages.

1. Click a model name to edit or add a new model.
2. Select the **Pages** tab.
3. To add a layout, click **Add New**.
4. Click **Apply**.

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Working With Deliverables & Activities

Deliverables help gatekeepers decide whether to continue or stop a project and can include:
- Templates
- Quick Grids
- Workflows (*Optional* Accolade component)

Each item is selectable within the deliverable configuration in the model. Activities are subtasks within a deliverable, and can also contain templates, quick grids, or workflows.

Adding Templates in Deliverables & Activities

Templates are the starting point for process documents and can be used to update project details or to create a document with details directly from a project.
1. From the **Process** menu, select **Templates > Template Library**.
2. **Add New** or Click the name of an existing template.
3. Complete the template information, selecting **Process Document** as the **Type**.
4. If adding a new template, click 🔍 and upload file.
5. Click **Create** to add a new template or **Apply** to save changes to an existing template.

Adding Templates to a Deliverable & Activity

1. Display the model that contains the deliverable or activity.
2. From the model tree, select the deliverable/activity to modify.
3. In the **Template** field, click 🔍 to select the template to add.
4. Click **Apply** to save your changes.

Creating Custom Project Pages

Creating and Adding Quick Grids

1. Select **Process > Page Design > Quick Grids**.
2. Click the name of an existing grid or click **Add New** to create a new quick grid.
3. Use the drag-to-design features to create grids, add metrics, and modify software controls in the center canvas to populate the grid.
4. Add styling and formatting to the cells.
5. Ensure the quick grid is active and click **Save**.

Note: The available properties are different depending on what is selected in the cell control type.

Adding Quick Grids to a Deliverable or Activity

1. From the **System** menu, select **Process > All Models** and click the model name to edit or add a new model.
2. Expand the model tree and select the deliverable or activity to modify.
3. in the **Quick Grid** field, click **Select** and choose the grid to add.
4. Click **Apply** to save your changes.

Other Process Model Options

Process models also contain the following configuration options, which are described in detail in the Online Help:
- Process graphic customization
- Team page settings
- Metrics, matrices, and any deliverable dependencies
- Start date, end date, and extended project metadata

Creating Page Layouts

1. From the **System** menu, select **Page Design > Layouts**
2. Click **Add New** in the Layout Designer.
3. Complete page layout information, ensuring the layout is active.
4. Click ⊕ to add a pod to the layout.
5. Populate with content in the **Pod Detail** pane.
6. Style the pod using the preview window.
7. Click **Add** or **Update** to save changes.

Tip: Associate the layout to a process model to have it display as a project pane.