Accolade

Project Participation Quick Reference

Navigating Accolade

Accolade ⟳ Workspace System Resource Planning Dashboards VOL Global Links   **+ Add New** **🔍 Search** ⑦ 🔔

Using Navigational Components

⟳ Recent Items: Display recently accessed items
⑦ Help: Access help content for the current page
  Search: Enter text to search for projects and files
  Menu: Access main level pages

Viewing Your Work

To access deliverables and activities assigned to you:

- Navigate to **Workspace > All My Work**
- Locate the Work pod, generally on the **Workspace > All My Work** page, or anywhere else the Work pod is configured
- On a Work pod, click on ⚙ and ensure Projects is selected to view projects you are a part of
- The Work pod views include Deliverables and Activities, Gates, Ideas, and Projects

Searching for Projects and Documents with Quick Search
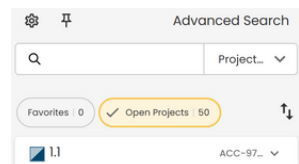
Enter text in the search field on the top-right, select **Project** or **Document** on the drop-down, and press enter.

📌 Docks the panel
⚙ Opens search preferences

Use operators in search:

AND	Match all words
OR	Match either word
NOT	Match first word, not second
" "	Match exact phrase
+	Remove inflectional forms of the search word
*****	Match all words beginning with the letters prior to *

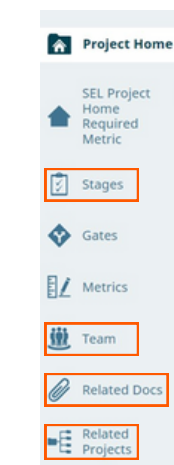## Working on Deliverables and Activities in Projects

Navigate to the **All My Work** page to access Projects, Deliverables and Activities that you are involved in as the project manager or as a team member. Click on the project name to display the project.

Updating Project, Deliverable, Activity Details

- Click 🗏 to edit, copy, or update as needed
- Click ▪🗐 to create links between related projects
- Click 🏠 and click **Add New Status** to enter the project status, and click **Apply**
- To enter status notes for deliverables or activities, click the Work card over on the **All My Work** page, and update the **Status Notes** field

Note: Status notes are permanent and cannot be deleted

Assigning Deliverables to the Team

- Click 👥 to add project team members
Assigning function owners will automatically assign deliverables and activities to the appropriate team member
- Click 📋 to display the stages of the project
- In the **Owner** column, select a team member, and click **Apply** to save your changes

Understanding the Stages Page

- Click ⊕ to add a new deliverable
- Click ▽ to create expand all stages
- Click ⩔ to collapse all
- Click 🗐 to switch to Card View
- Click 🗏 to switch to Table View
- Click 🔒 to lock the stage
- Click 🖨 to print the page
- Click 🔻 to apply filters
- Click ✏ to edit the content of the stage
- Click 🖩 to save the current view as the default view for this stage in this project
- Click ⋮ corresponding to each deliverable for more options:
  - Click on **Add Activity** to add an activity to the deliverable
  - Click on **In Trouble** to mark the deliverable as needing attention
  - Click on **Follow Up** to mark the deliverable with a flag to be inquired into
- Click 💬 next to the owner corresponding to each deliverable, to communicate directly with the owner of the deliverable

Starting Deliverables and Activities

From **All My Work**, click on a deliverable and activity name to display its details, and under the **Status** field, select the new status to indicate this task has been started.

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Adding Related Documents to Deliverables & Activities

- In the contents tree in the deliverable / activity details, click **Related Documents** and attach the file:
  - Select the file to upload and store in Accolade; you can also drag and drop a file to the Related Documents pane
  - Link to a file on the network or to a web site URL
  - Associate an existing related document.
- Then, in the table, enter a category and description to identify the attachment.

The document is added to the deliverable/activity and to the project. To add related documents at the project level, click in the project menu to access the Related Docs page and add documents.

Completing Assigned Deliverables

On Quick Grid:

1. Ensure status of the deliverable or activity you want to work on and is set appropriately
2. Click on the document name
3. Complete the form by entering text and selecting options

On file-based documents:

1. Ensure status of the deliverable or activity you want to work on and is set appropriately
2. Click on the document name
3. Do one of the following:
   - To create the initial version of a document from a template: At the top of the Contents tree, expand the Versions section and click Template
   - To create a new version of a document based on the latest version: Expand the Versions section and click Latest Version to download the latest version to use as a base for the new version
   - To create a new version of a document based on another version: In the Versions table, click the name of the version to download; then when you edit and save an existing version of a document back to Accolade, a new version is created
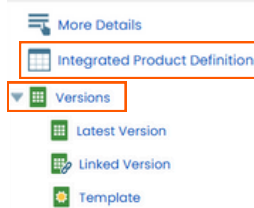
Collaborating on Deliverables and Activities

- From deliverable / activity details: Click on 💬 to communicate with other team members on the task
  - Click on ✉ to email
  - If the project is connected to a Microsoft Teams channel, click on 📞 start a call, click on 💬 to start a chat, click on 📅 to schedule a meeting
- From a Microsoft Office application: Select **File > Save to Accolade**, select **Save as Deliverable/Activity**, enter details, and click **Save & Send** to create an email to the project team
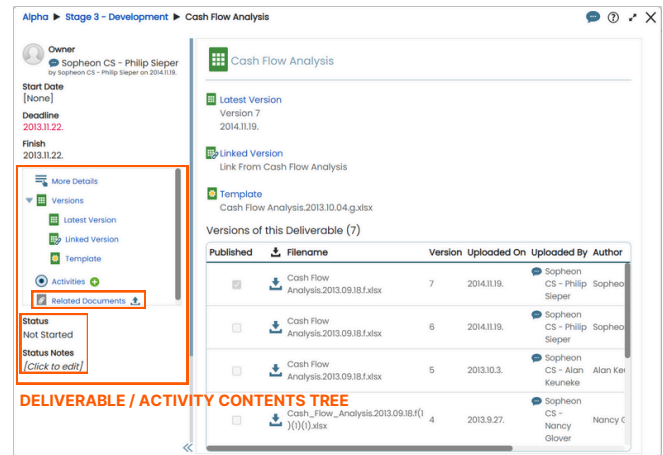
Downloading Templates and Versions

- From the **Stages** page or deliverable / activity details, click the desired template or version to start the download
- From the 🖼 **Card View**, click 📥 to download the template
- From the 🖼 **Table View**, hover over the icon next to the template you wish to download, and click to download

Note: Icons identify the file type, such as Document, Spreadsheet, or Presentation 📄📄📄📄📄📄📄📄

Saving and Uploading Deliverables

- Drag and Drop to Accolade: Display the deliverable / activity details and click **Versions**, then drag and drop the file from your local files into the **Versions** pane
- With Accolade Office Extensions Add-In: Select **Save to Accolade** from the Microsoft Office application's **File** menu.