

Understand & Manage Projects Quick Reference

Understanding Project Components

A project in Accolade can be any number of things and can serve your company's needs in a variety of ways. It can be a new product, part of a new product, a repository of documents, a campaign to gather ideas, or a way to collaborate on processes, products, ideas, and best practices. Project information is contained in a variety of places located in a central location for each project. Depending on your role on the project, you may have access to view or edit the project information in the project pages.

The screenshot shows a project page for 'New Product Development' with a 'Project Manager' Jerry Vermeulen and 'Project ID' 200. The 'Current Stage' is 'Stage 3 - Development' and the 'Next Gate' is 'Gate 3 - Go to Testing and Validation'. The 'Process Graphic' shows a sequence of stages: Stage 1 - Scoping, Stage 2 - Build Business Case, Stage 3 - Development, Stage 4 - Testing and Validation, and Stage 5 - Launch. A table below shows deliverables for Stage 1, including 'Webdoc Deliverable' (Not Started) and 'Integrated Product Definition' (Completed).

The Project Header includes key project information such as the project name, model, current stage, and the assigned project manager.

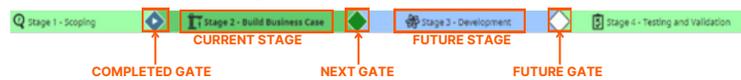
The Process Graphic provides a graphical representation with links to stages and gates within the project.

The Navigation pane includes options to access different pages within the project, such as the current stage and gate, project teams, reports, and related documents.

The Content pane displays the project information associated with the project as editable or read-only, depending on your user role and your assignments within the projects.

Stages and Gates

- A project is created using a process model that represents the structure that processes follow.
- A model can be a series of alternating periods of gathering and developing a product or service (Stage), or check points to decide whether to continue the product development (Gate).
- It is represented by the Process Graphic.



Deliverables and Activities



- A deliverable is an item that is produced for a gate meeting to help gatekeepers decide whether to continue or discontinue a project. Deliverables can be physical items such as a prototype; they are represented in Accolade as documents or as quick grids (or a combination) where document owners can enter information.
- An activity is anything that helps to complete, or is part of, a deliverable.

Project Teams

A project team typically consists of the following:

- **Project Manager/Team Leader:** The person who likely assigns you work on the project and is managing the project through its stages and gates.
- **Project Team Members:** The people who are assigned to complete the content that is part of stage or gate.
- **Gatekeepers:** The executives that made decisions about whether a project can move forward to the next stage.

Other Project Components

- Projects contain other project components, such as documents related to the project that are not considered deliverables or activities within a stage.
- All project information is accessible through the project navigation pane available on left side of the project pages.
- Settings in the model determine which of the project pages are available, and your role on the project team determines what you can do within the project.

Creating Projects

1. Click on **Add New** on the Accolade menu bar
2. Select the class and the model
3. Enter information to identify and describe the project
4. Complete the access and security options to define the project's security access
5. Optionally, complete the additional project details for initial project creation, and upload any related files
6. Click on **Create**

The 'Add New' form includes fields for 'Class' (set to [All]), 'Model' (set to [Innovation Planner Default]), 'Project Name', 'Project ID', and 'Description'. It also features a 'Project Manager' dropdown (set to [None]), a checkbox for 'Project Manager can manage team', a 'Security List' dropdown (set to Regional), a 'Related Documents' field, and an 'Access Group' field.

Managing Projects

Setting Dates

Each project has defined start and end dates, with their availability and requirement determined by their model.

To set project dates:

- Do so at project creation or migration
- Navigate to the **Project Home** page
- Navigate to the **Details** page
- Locate the process graphics

For gated projects, after the project start and end dates are defined, the start and end dates of the stages are set based on the gate dates for each gate. The first stage lasts from the project's start date to the first gate date. The second stage is from the first gate to the second gate date, and so on.



The **Set gates page to read-only** setting in the process model determines if the content on the **Gate** page and the gate dates in the process graphic can be edited.

Gate dates are set automatically when:

- When workflows assigned to a deliverable are completed
- When the model for the project uses a metric to set the gate date.

After the stage durations are defined, the deliverable and activity start, finish, and deadline dates are defined to fall within a stage's time period.

Sharing Project Details with Stakeholders

Projects may contain an outside stakeholder who does not have a login to Accolade. The stakeholder has a vested interest in the success of the project and wants to be kept up-to-date, but does not need to edit information or access other projects.

To create a shared page:

1. Open a project, navigate to the desired project page.
2. Click  on the upper right corner, and select **Share with Stakeholders**
3. Click on items to include or exclude from the shared page
4. Click **Next** to preview your layout, and resize and rearrange items as needed
5. Click **Next**, and on the left pane, enter the recipient details
6. Click on **Share Page**, and when your email client opens, compose your email, and send

Updating Project Status & Details

To add a status update to a project:

1. Open the project's **Project Home** page, and locate the project status entry area
2. Click on  [Add New Status](#) in the Project Status pod, and enter project status information in the fields provided
3. Click **Apply**

To update project details:

- From  **any project page**: Click  on the upper right corner, and select **Edit** to update project details like the project name, visibility and security, exclusions, and if a Project Manager can manage the team



Migrating and Copying Projects

At times, a project may need to change process models. Process Designers create the migration maps required for project migration, and Process Managers with Migrate Project rights can migrate and copy projects. Prior to migrating projects, review the **Criteria for Successful Project Migration** topic in the Online Help. Then, to migrate a project, follow the steps outlined in the **Migrating and Copying Projects** page on the Online Help.

Closing and Deleting Projects

Closing a project prevents any further changes in the project and is the first step to deleting it. A closed project remains in the Accolade database.

To close a project:

1. Open a project, click  on the upper right corner, and click **Close Project**
2. Enter any comments
3. Click on **Done**

Deleting a project removes the project, its related files, deliverables, and other data from the Accolade database. You must close a project before you can delete it.

To delete a project:

- Open a project, click  on the upper right corner, and click **Delete Project**

Note: To re-open a closed project, display the project, click in the upper right corner, and select **Re-Open Project**