Sopheon Accolade®

Process Design - Process Model Design Training Guide

Version: 17.1

About Sopheon Accolade®

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Contents

About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

Document	Contents
Sopheon Accolade What's New in This Release	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

Accolade User Roles

- Process Designer

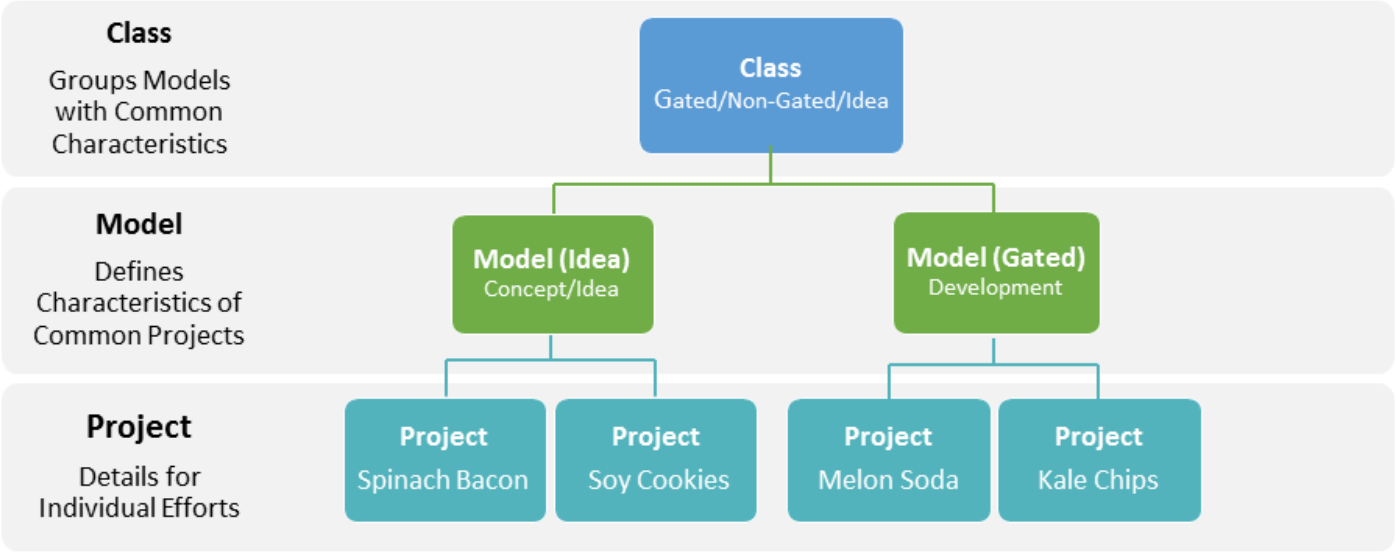
Terms and Concepts

- Access Groups
- Matrices
- Metrics
- Reports
- Templates

Related Training Modules

- Process Design Overview
- Metric and Matrix Design
- Deliverable and Activity Design
- Designing Charts and Reports

Classes and Models



A process model is a template of the process flow for the projects that use it. By designing a model, Process Designers ensure that similar projects follow the same process from start to completion. The goal of building models is to create a measurable, repeatable process that captures your company's best development practices. The processes are as unique as your company and the products and services you offer. Companies can create a library of models for different types of projects. For example:

- Process models that follow a classic Stage-Gate process that takes a project from idea submission or discovery all the way through to product launch, including stages for development, testing and validation, and manufacturing.
- An express Stage-Gate process model that includes an abbreviated version of the classic model.
- Idea process models that contain an idea submission stage and an idea evaluation gate that all ideas move through prior to moving to a development model.
- Process models for internal projects, such as Human Resource benefits open enrollment.
- Process models used for portfolio projects and that specify the model used for projects within the portfolio.

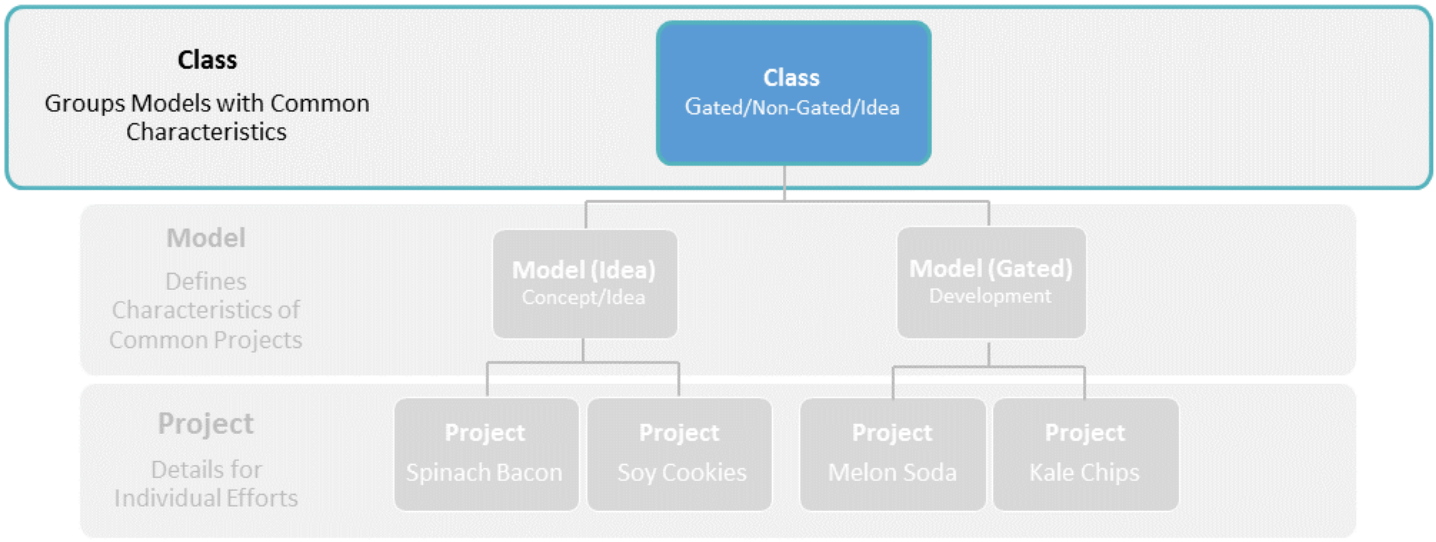
Models are grouped using classes. The process type selected in a model's class determines its process type:

- **Gated** - A model that follows the Phase Gate process, including one or more sets of stages and gates.
- **Non-Gated** - A model that includes one stage but no gates. Non-gated models are useful as static place-holders and information storage locations in larger systems.

- **Idea** - A model used for idea submissions. Idea models, like Gated models, can contain one or more sets of stages and gates.

The class designation allows Process Designers to create groups of models that share similar visibility on Accolade pages, similar event reporting, and other similarities.

Classes to Group Process Models Overview



Classes set some features of projects based on process models that use the class, such as whether the project is available on the All My Work page. Each project's basic framework at creation is a combination of the class characteristics and the process model that uses the class.

The primary difference between classes is the process model type:

- **Gated** - A model that follows the Phase Gate process, including one or more sets of stages and gates.
- **Non-Gated** - A model that includes one stage but no gates. Non-gated models are useful as static place-holders and information storage locations in larger systems.
- **Idea** - A model used for idea submissions. Idea models, like Gated models, can contain one or more sets of stages and gates.

The accessibility of models can be affected by the access groups of the class it was created from in the following ways:

- If a user does not have view access to a class, they do not have view access for models created from that class.
- Models cannot be copied in UI if the class is read only for the user.
- In the model editor page, only classes that the user has edit access and have equal or higher access groups to the model will be displayed.

Classes Best Practices

Keep the following set of best practice recommendations in mind when creating classes:

- **Copy Existing Classes to Create New Classes** - If you have a class with a large number of reasons for events, and you need to create a class that is similar, copy a class and modify its reason lists rather than creating new reasons manually.
- **Use the Same Reason Codes for Event Reasons Across Classes** - For reporting purposes, define a set of reasons for events that may occur in projects that use models based on each class, and ensure reasons for similar events are the same across classes. For example, ensure the event reason code for the gate decision to kill a project is the same for all classes. If the reason codes are different across classes, you also need to create separate gate decision reports for each class.
- **Create Unique Event Reason Codes without Reusing Deleted Codes** - If you delete a reason that has *not* been selected in a project, the reason is deleted, and you can reuse its code. However, if you delete a reason that *has been* associated with an event in a project, the code is removed as an option from future projects, but remains assigned to events in existing projects for reporting purposes. If you re-use the deleted code, Accolade associates events previously linked to the deleted reason code with the new reason code. For this reason, Sopheon recommends using only unique codes and to avoid re-using deleted codes.
- **Manage Classes for Accolade Innovation Planning Projects Appropriately** - Accolade creates classes and associated models for planning projects as Planners create element types for planning and roadmapping. Changes to the class, such as changing the name or deleting the class, are reflected in the element type. Ensure that users with the Planner user role that are allowed to create element types and Process Designers within your organization understand that the changes to a class also change the element type.

Modifying Existing Classes

Consider how modifying an existing class changes projects and models based on that class.

Changes made to the following class details are reflected in models using the class and in current and future projects that use those models. All class changes apply to projects created after the class changes are saved.

- Display name
- System name
- Description
- Email notifications
- Project included on All My Work page
- Assignments included on All My Work page
- Include in Save to Accolade from Microsoft 365 applications.

- Changing Gate Line-up setting or the Reporting setting a default selection to an 'always' selection. Note that changing these settings enables the field in open projects, but the setting is not automatically changed.
- Changing the Reporting flag from a default selection to an 'always' selection
- Class icon selection
- Class-specific terminology changes
- Adding, deleting, or modifying event reason lists change the lists in current and future projects.

Creating Classes

A class categorizes a selection of process models that share a similar process type, and serves as a template for the models and projects created that are based on them.

To create a class:

1. From the **System** menu, select **Process > Classes**.

   To narrow the class list, search by the class name, system name, or category.

2. Do one of the following:
   - **To add a new class** - Click **Add New** in the upper right corner of the page.
   - **To create a class based on an existing class** - Click  in the **Copy** column to create a copy that can be used as a base to build a new class.
   - **To edit an existing class** - Click the name of the class to open it for editing.

   To copy a class to use as a base for a new class you must have "Can Edit" for any access group in the system and "Can View" for at least one access group on the class. If you "Can Edit" any of the access groups the class belongs to, the copy will have those groups. If you do not have "Can Edit" on any of the class' access groups, the copy will inherit your highest access group you can edit.

3. Complete the following information to identify and describe the class:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the class.
System Name	Enter a unique, shorter name that identifies the class in queries, reporting views, field codes, and other places in Accolade. The name must be unique among classes and can contain only letters (English alphabet), numbers, and the underscore.
Process Type	Select the type of process that models created using this class follow: • **Gated** - A model that follows the Phase Gate process, including one or more sets of stages and gates.

Field	Description
	• **Non-Gated** - A model that includes one stage but no gates. Non-gated models are useful as static placeholders and information storage locations in larger systems. • **Idea** - The model used for idea submissions. Idea models, like gated models, can contain one or more sets of stages and gates. The **Idea** option is only available if your company uses the optional Idea Submission or Ideation components. Note that this selection cannot be changed once the class is created.
Icon	Select the icon that projects based on this class use. Icons help provide a visual indication of the class type where projects are listed, including the All My Work and other similar pages.
Description	Enter a description of the purpose or nature of the class. This description helps others identify the class throughout the system.
Order	Enter a number to specify the class's place when it displays in a list of classes. Lower numbered classes display higher in the list.

4. Complete the additional class options as appropriate for the class you are defining.

Field	Description
Gate Line-Up	Select whether the projects based on this class display in the **Gate-Lineup** pages: • **Default to included** - The **Excluded from Line-up** check box within the project is initially set to include the project in the line-up pages. Process Managers and Project Managers can change the value within projects, as necessary. • **Default to excluded** - The **Excluded from Line-up** check box within the project is initially set to exclude the project from the line-up pages. Process Managers and Project Managers can change the value within projects, as necessary. • **Always included** - The **Excluded from Line-up** check box is set to include the project in the line-up pages and is view only within the project. • **Always excluded** - The **Excluded from Line-up** check box is set to exclude the project from the line-up pages and is view only within the project.
Reporting	Select whether data from projects based on this class is included in reports: • **Default to included** - The **Excluded from Reports** check box

Field	Description
	within the project is initially set to include the project data in reports. Process Managers and Project Managers can change the value within projects, if necessary. • **Default to excluded** - The **Excluded from Reports** check box is initially set to exclude the project data from reports. Process Managers and Project Managers can change the value within products, if necessary. • **Always included** - The **Excluded from Reports** check box is set to include the project data in reports and is view only within the project. • **Always excluded** - The **Excluded from Reports** check box is set to exclude the project data from reports and is view-only within the project.

5. Select the **Active** check box when the class is ready to use in process models.
6. Select the **Is portfolio** check box to allow projects that use this model to be a parent project in a collection of projects, called a portfolio.

   Selecting this option displays the **Portfolio** page within projects, which lists projects that are linked using the Member Of link type.
7. Select the **Enable email notifications** check box to send notifications by default via email about events in projects that use models that are based in this class.
8. Select one or more of the "Include in" options to make projects based on models that use this class available throughout Accolade.

Field	Description
Include in Work Pod	Select this check box to allow projects as well as deliverables and activities to display in the Work pod.
Include In Portfolio Optimizer	Select this check box to include projects in Accolade Portfolio Optimizer. Typically, projects that do not include resources, for example projects that are only grouping mechanisms for other projects, are excluded from Portfolio Optimizer. This selection is only available if your company uses the optional Portfolio Optimizer component.
Include In Resource Editor	Select this check box to include projects in Resource Editor. Typically, projects that do not include resources, for example projects that are only grouping mechanisms for other projects, are excluded from Resource Editor.

Field	Description
	This selection is only available if your company uses the optional Resource Planning component.
Include in Save to Accolade	Select this check box if you want users to be able to use **Save to Accolade** functionality to save documents and project plans to projects that use models that are based in this class.
Include in Time Tracking	Clear this check box if projects created using this class do not require time to be tracked against them. Leave the check box selected if timesheet users can add projects created in this class to their timesheets to record time worked on that project. This selection is only available if your company uses the optional Time Tracking component.
Show in Planning	Select this check box to display projects created using this class as planning elements in planning and roadmapping. This option only controls the display of projects as elements and is available to all class types in Innovation Planning. This selection is only available if your company uses the optional Innovation Planning and/or Roadmapping components.
Create in Planning	Select this check box and select a process model associated with this class to make the class available as a planning element type. The **Include in Planning** option is selected by default when you select this option, so elements created using this type in Innovation Planning are also available to view within Innovation Planning. Note that this option is not available until after a gated or non-gated class is created and at least one model is associated to the class. This selection is only available if your company uses the optional Innovation Planning and/or Roadmapping components.

9. Click **Create** to create the new class or **Apply** to save changes to an existing class.
10. *(Optional)* After you create the class, continue with one or more of the following steps to complete the class setup:
    - Define reason codes for project events to log why certain events in these projects occurred.
    - Configure access group restrictions for the class.
    - Set customized terminology to be applied to projects that use a model based in this class.

Notes:

- To delete a class, display the class and ensure the **Active** check box is cleared. Click **Delete**. If you delete a class that is used by one or more security profiles, users with those profiles no longer have access rights to projects that use models assigned to that class.
- Newly created classes are automatically added to the classes available in the Child Relationship link type if all classes are set as available for that link type. However, if other link types include all classes, a newly created class is not automatically added. Update the link type to include the class, as needed.
- If you delete a class used in Accolade Innovation Planning and Roadmapping, any planning element type based on that class is also deleted and planning elements that use that type are removed from the planning board and all planning views. However, models and projects based on that class are not deleted.

Defining Event Reason Codes in Classes

Reason codes allow detailed history of certain project events, such as changing a project manager on a project or changing a gate date. For reporting purposes, define a set of reasons for events that may occur in projects that use models based on each class, and ensure reasons for similar events are the same across classes. For example, ensure the event reason code for the gate decision to cancel a project is the same for all classes. If the reason codes are different across classes, you also need to create separate gate decision reports for each class.

Note: Event reason codes are not used for automated gate decisions set for gates in the process model or through an automated workflow step.

To define an event reason code in a class:

1. From the **System** menu, select **Process > Classes**. To narrow the class list, search by the class name, system name, or category.
2. Either select the class to edit.
3. Click the **Event Reason List** tab and select a project event type from the **Event Type** field.
4. If necessary, click **Add New** to display a new line for the event code and complete the following information:

Field	Description
Order	Enter a number to specify the reason's place when it displays in a list of reasons. Lower numbered reasons display higher in the list.
Code	Enter a unique, shorter name that identifies the reason in queries, reporting views, and in Accolade Office Extensions. Codes help to maintain project history if changes are made to the reason name.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the reason to users who assign it to events within projects.

5. Select the **Active** check box when the reason code is ready to use in projects.
6. Click **Apply** to save your changes.

Notes:

- To delete a reason code, click the  at the end of the reason code's row, and click **Apply** to save your change.

Configuring Class Terminology

Accolade provides the flexibility to configure text displayed in a project based on a process model. Administrators and Process Designers can make changes at the class level to project-related terms such as Project ID or Project Manager, which are applied to all process models in that class.

For example, your company may have a division where projects are called "Features" and the role of project leader is defined as a "Feature Owner". For process models that are used by this division, you can change the Accolade field Project Manager to display Feature Owner to match this role definition, to help users align company and Accolade roles and assignments.

Class terminology can be configured in all languages that are enabled in your implementation. When a user selects the language in which to view the application in their user profile, the application uses the configuration entered for that language.

Class configurable text includes project-related terms such as:

- Field names
- Page titles
- Menu names
- Confirmation messages

Important! Terminology and language changes will require you to restart the Accolade Cache Service and reset IIS on all application servers in order to display the changes. Be mindful when making these updates, as users will temporarily be unable to access Accolade during the reset process.

To configure the terminology for a specific class:

1. From the **System** menu, select **Process > Classes** and select the class to edit.

   To narrow the class list, search by the class name, system name, or category.

2. Click the **Class Terminology** tab.
3. In the **Language** field drop-down list, select the language to which you want to make changes.
4. *(Optional)* To narrow the list of translatable items, enter search criteria in the **Filter By** field and click **Filter**.

   Only items with the criteria you enter display in the list. Leave the field empty to display all available translatable items. Note that some items may not be translatable.

   To find a specific term or phrase and replace one instance or all instances, use the **Find What** and **Replace With** fields to complete a search and replace throughout the translatable items.

5. In the **Current Value** column, enter the translated text, or the text to use instead of the text in the **Default Value** field.

   Note that some items may display as read-only depending on your access group admin rights

   To create multi-line text strings, press **Enter** to start the next line.

6. To finish work on a string, click outside the **Current Value** field that you are editing.

   Edited fields display highlighted to help you track the changes you have made.

   Important! In text strings that include a token (for example, {0}) that inserts text into the string, you must include the token in the appropriate place in the translated version. The explanations in the **Required Tokens and Explanation** column indicate where to place the token.

   Some tokens are enclosed in single quotes, ', or angle brackets, < >. These marks are part of the text, not part of the token. You can leave, remove, or change them, as appropriate.

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7. Click **Apply** to save your changes.

Configuring Terminology for Multiple Classes

The **System > Configuration > Class Terminology** page can also be used to view, edit, and export/import changes to terminology for multiple classes at once. See Importing and Exporting Class Terminology for more information on creating and using the import process.

To configure the terminology for a specific class:

1. From the **System** menu, select **Configuration > Class Terminology**.
2. Click the **Class Terminology** tab.
3. In the **Language** field drop-down list, select the language to which you want to make changes.
4. In the **Class** field drop-down list, select the class to which you want to make the changes.
5. *(Optional)* To narrow the list of translatable items, enter search criteria in the **Filter By** field and click **Filter**.

Only items with the criteria you enter display in the list. Leave the field empty to display all available translatable items. Note that some items may not be translatable.

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   Some tokens are enclosed in single quotes, ', or angle brackets, < >. These marks are part of the text, not part of the token. You can leave, remove, or change them, as appropriate.

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8. Click **Apply** to save your changes.

Notes:

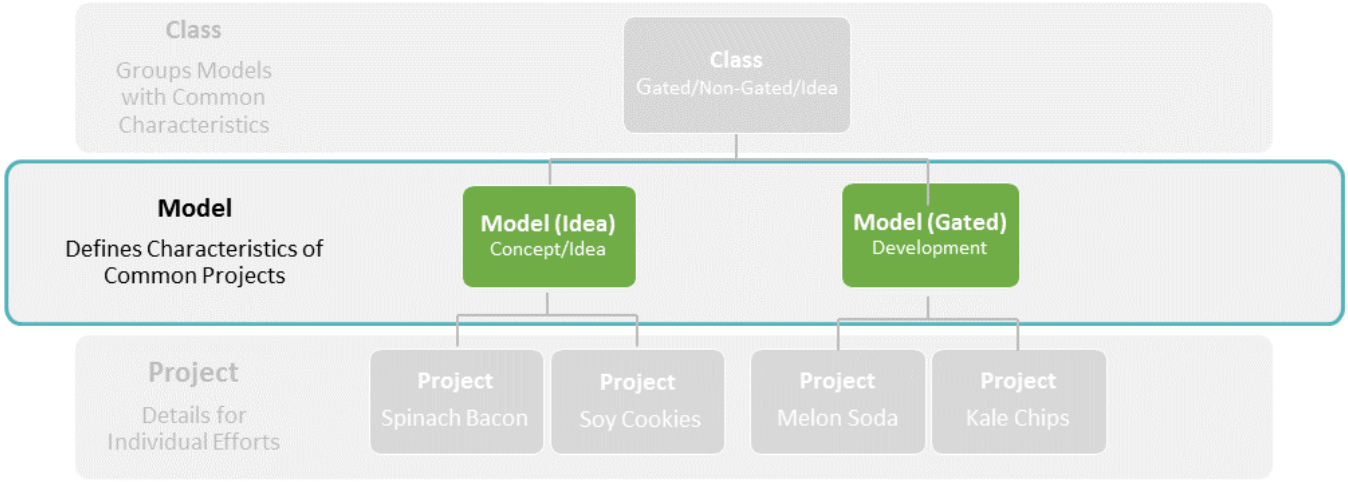
- New language options must be first added to the system through the **System > Configuration > Languages** tab in order for the language to be available for configuration at the class level.
- If your company uses a load balanced configuration, you will need to restart the Accolade Cache Service and reset IIS on all application servers if you make any terminology or language changes.
- The content of the online help references the English translation of the default value for all the items listed above, and is not customizable or translatable at this time. The changes made to the entity names page (**System > Configuration > Entity Names**), the system language page (**System > Configuration > Languages**) or the class terminology page (**System > Configuration > Class Terminology**) will not currently change the references in the help content.
- Translatable options do not include text in Portfolio Optimizer or in the Portfolio Optimizer help.

Exercises - Creating Classes

Try out what you have learned!

- Create and save a gated class that is available to My Work.
- Ensure the class is setup to allow email notifications.
- Add at least one event reason code for selection when a project is put on Hold.
- Create and save a non-gated class.

Process Models Overview



Models can consist of various arrangements and numbers of stages and gates.

Information required during each stage is specified in deliverables and activities within each stage in the model. Similarly, the purpose and definition of each gate meeting is defined in gates and gate documents, if the model includes gates.

If your company runs planning and roadmapping, a new class and model is created each time a new planning element type is created. These planning models display on the Models page with the default name ACC_Model_(number). You can edit the model, as needed.

Process Model Best Practices

Keep the following set of best practice recommendations in mind when building process models:

- **Ensure You Have the Elements You Need to Define a Model** - Models contain the structural elements that make up a project. You can modify some aspects of a model after its creation. However, to help ensure a smooth process when defining models, have as many of the components defined as possible before creating the model, for example templates, workflows, quick grids, and metrics.

- **Create Duplicate Models to Add or Delete Stages or Gates** - After a model is saved and in use in an open or closed project, you can no longer add stages or remove gates in the model. To add or delete stages or gates when there are projects using the model, duplicate the model using the Copy function on the main **Models** page, then modify the copy and migrate projects to the new model as necessary. You can delete a stage or gate if it is the final object in the process model.

  Note: This also applies to moving a stage or gate within the model.

- **Reassign Default Users** - When an Administrator deletes a user, Accolade removes the user from any default assignments within process models. When a user is deleted from Accolade, reassign another user to the default assignment so the position within the project is filled.
- **Automate Gates Using Metrics in Models** - Using metrics and metric conditions that are defined in a model, automate aspects of the project management process such as setting gate dates and gate decisions based on the completion of other project components.
- **Use Careful Consideration When Defining Models for Migration** - For deliverables, activities, gates, and gate documents to map automatically when a Process Manager migrates a project from one model to another, the objects in the model must have identical names (except for initial and final spaces, case, and initial numerals).
- **Know the Effects of Modifying Existing Models** - Making changes to an active process model will result in changes to open and/or closed projects that are based on the model.
- **Know What is Not Duplicated in Copied Models** - If you duplicate a process model, the project link rules in the source model are not copied to the new model. Redefine the link rules in the new model, as necessary.
- **Know the Effects of Deleting a Model** - Deleting a model prevents the creation of any additional projects based on that model; however, existing projects that use the deleted model can continue using the model. Keep the following additional points in mind before deleting a model:
  - You can only delete inactive process models.
  - Deleting a model also deletes any migration maps that migrate projects to that model.
  - If a model has been inserted into one or more Microsoft Project Plan templates, deleting the model when there are no projects using it also deletes the templates from the Template Library. However, if an existing project uses the template, it remains in the Template Library and the projects can continue.
- **Make Metrics in Planning Models Available in Accolade** - The default [Innovation Planning Default] process model is the default planning model used to generate projects that correspond to planning elements in Accolade Innovation Planning. Process Designers can create additional planning models that correspond to various planning element types. By default, the metrics associated with planning models are not shown or editable within a project's pages. To ensure that metrics are available in the corresponding projects within Process Manager, select **Show** or **Edit** for the appropriate project pages when associating metrics to models.

Creating Gated and Non-Gated Process Models

By creating a process model, Process Designers ensure that similar projects follow the same process from start to completion. The basic steps to create a gated or non-gated model are the same and described below. For gated models, continue by adding stages, gates, and so forth as appropriate to the model type. Non-gated models are created with a single stage.

To create a gated or non-gated process model:

1. From the **System** menu, select **Process > All Models**.

   To narrow the process model list, search by the process model name, system name, or class.

2. Do one of the following:

   - **To add a new model** - Click **Add New** in the upper right corner of the page.
   - **To create a new model based on an existing model** - Click  in the **Copy** column to create a copy that can be used as a base to build a new model.
   - **To edit an existing model** - Click the name of the model to open it for editing.

   See "How Changing Process Models Affects Open and Closed Projects" on page 105 to understand what changes are applied to open and closed projects.

3. If you selected to add a new model, complete the following information to identify and describe the model:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the process model. Give the model a name that clearly indicates which projects use the model so Process Managers recognize the model to select when creating projects.
System Name	Enter a unique, shorter name that identifies the process model when importing and exporting models between environments.
Class	Select the class to which the model belongs. The class you select determines if the model is a gated or non-gated model, based on the process type defined in that class.
Description	*(Optional)* Enter a description of the purpose and use of the model. The description should provide additional details about the type of projects that are appropriate for this model.
Configuration Access Groups	Select the access group(s) to which this process model belongs.

Field	Description
	The access group(s) displayed are based on the current user's access group permissions, and the process model defaults to the highest level access group listed. Note that the process model is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked. Edit the configuration access group on the Security tab of the process model.

4. Click **Create** to create the model.
5. On the **Process Definition** tab, complete the following information in the **Process Editor** section to define display and behavior for projects based on the model:

Field	Description
Name	Edit the name of the process model.
System Name	Edit the system name.
Class	Edit the class selection. To modify the class, the new selected class must have the same **Process Type**. If there are multiple classes of the same Process Type (gated, non-gated, idea), those classes display for selection. If there are no classes of the same Process Type, the field displays as read-only.
Description	Edit the description.
Project Name Metric	To set a project name automatically based on a metric value, click and select the metric that determines the name. Only metrics associated to the project are available for selection. If a metric is selected: • Ensure the metric required to set the project name is available for edit on the project creation page so the name can be populated accordingly. • Ensure that the selected metric's formula does not include the project name, or a metric that includes the project name. **Note:** If the metric's calculation returns no value, the project name is set to the class name. If a metric is selected here, the project name is read only within the project pages.
Project ID Metric	To set a project ID automatically based on a metric value, click and select the metric that determines the ID. Only metrics associated to the project are available for selection.

Field	Description
	If a metric is selected: • Ensure that the metric required to set the project ID is available for edit on the project creation page so the ID can be generated accordingly. • Ensure that the selected metric's formula does not include the project ID, or a metric that includes the project ID. **Note:** If the metric's calculation returns no value, the project ID is set to the system project ID. If a metric is selected here, the project ID is read only within the project pages. If the **Auto-Generate Project IDs** system parameter is enabled, this option is not available.
Project Link Rules	Click **Project Link Rules** to define a set of rules and conditions that are used to link related projects for all projects that use this process model. See "Adding Project Links in Process Models" on page 87. You can only edit link rules for process models to which you have configuration access group rights. Only process models to which you have configuration access groups display for selection when linking related projects. However, you can edit rules linked to multiple models even if some models you only have view access groups rights to.
Active	Select this check box when the model is ready to use in projects.
Disable Add New	Select this check box to disable the ability to create new projects through the Add New Project page or Add New button pods. Use this setting to create a model for projects that, for example, are only created through project migration, project import, or as elements in the Planning Board.
Hide from Add New page and drop-downs	Select this check box to remove the model from the list of models on the Add New Project page. Use this setting to create a model for projects that, for example, are only created through an Add New button pod within a project.
Set gates page to read-only	If this is a gated model, select this option to disable the ability to edit gate content and gate dates within a project either directly on the project's Gates layout pages, or via the process graphic. Select this option only if you use other means to set project gate dates and decisions within the projects that use the model, such as using automated steps within workflows.

Field	Description
Default Project Manager	To set a default Project Manager for new projects created based on this model, select one of the following options: • **To assign a Project Manager automatically** - Select the **User** option and click to select the Accolade user that will automatically be assigned as the Project Manager. • **To assign a Project Manager automatically based on a metric value** - Select the **Metric** option and click to select a metric whose value determines the Accolade user that is assigned as the Project Manager. Selecting a metric enables automatic routing of ideas, concepts, and projects to the correct business leader based on other project criteria such as business area, product line, or geographic location. Only users assigned the Project Manager user role and only metrics associated to the model are available for selection. Process Managers can assign a different manager at the project-level after a project is created. Ensure metrics scheduled to calculate only on project create do not reference team leader metadata if the default project manager metric is set.
Lead/Manager required on create	Select this check box to require a project manager be selected before project creation or migration. This setting does not enforce project manager selection for Ideation, Innovation Planning, importing projects, or workflow migration.
Default Portfolio Child Model	Select the model that is used for projects created when the **Create Child Project** button is used within a page layout assigned to this model. The model you are creating must be based on a class that is set as a portfolio class to select a default model. Only models you have appropriate access group view or configuration rights to display for selection.
Allow Mid-Process Project Start for Creation	If this is a gated model, select from the following options: • **No** - Projects created using this model start at the beginning of the process, and do not allow a project to start mid-process. This is the default setting. • **Select by Stage** - Projects created using this model can start in a selected stage within the process. Select this option if the model starts with a stage to ensure that projects can start at the beginning of the process. • **Select By Gate** - Projects created using this model can start in a selected gate within the process. Select this option if the model starts with a gate to ensure that projects can start at the beginning

Field	Description
	of the process.
Allow Mid-Process Start for Migration	If this is a gated model, select from the following options: • **No** - Projects migrated to this model start at the beginning of the process, and do not allow a project to start mid-process. This is the default setting. • **Select by Stage** - Projects migrated to this model can start in a selected stage within the process. Select this option if the model starts with a stage to ensure that projects can start at the beginning of the process. • **Select By Gate** - Projects migrated to this model can start in a selected gate within the process. Select this option if the model starts with a gate to ensure that projects can start at the beginning of the process.
Extend project edit rights	Select this check box to allow the extension of project edit rights to selected team members. When enabled, Project Managers can select team members who are allowed to edit project information that is available on project page layouts, such as the **Project Home** page or any other custom project pages.

6. *(Optional)* Define the documents associated to the model in the **Document Management** section with the following settings:

Field	Description
Related Document Categories	Enter the list of categories that are available for related documents added to projects based on the model. Separate the list items using the pipe (|) character. For example, enter Specs|Designs|Schedules to create three categories that use those same names. If the model contains no categories, all related documents are added to the **Default** category.
Protect versions from deletion	Select this option to disable the deletion of all documents in a project. If set, users on a project cannot delete any deliverable, activity, related document, or gate document version. In addition, users cannot delete an activity if it contains a version. Selecting this option overrides any **Allow versions to be deleted** settings for individual deliverables, activities, and gate documents. To allow the deletion on an individual document basis, clear this option and set the **Allow versions to be deleted** option at the individual document level.

7. *(Optional)* Select the process model graphic style in the **Appearance** section after you create the model.
8. Click **Apply** to save your changes.

Notes:

- To delete a model, display the model and ensure the **Active** check box is cleared, then click **Delete**. If you need to clear the **Active** check box, click **Apply** to save the change, then click **Delete**. See "Process Model Best Practices" on page 19 before deleting models.
- To rename an existing model, access the model as described above, update the name in the **Name** field, and click **Apply**. Changes to the model name are made only to open projects.

Creating Idea Process Models

Idea models are used to automatically create projects based on an idea someone submits for a new product or service. Often the purpose of idea projects is to complete the preliminary evaluation of the submitted idea. Idea models can contain stages and gates.

> Before you create an idea model, create its idea form and add it to the Template Library.

To create an idea process model:

1. From the **System** menu, select **Process > All Models**.

   To narrow the process model list, search by the process model name, system name, or class.

2. Do one of the following:
   - **To add a new model** - Click **Add New** in the upper right corner of the page.
   - **To create a new model based on an existing model** - Click  in the **Copy** column to create a copy that can be used as a base to build a new model.
   - **To edit an existing model** - Click the name of the model to open it for editing.

   > See "How Changing Process Models Affects Open and Closed Projects" on page 105 to understand what changes are applied to open and closed projects.

3. If you selected to add a new model, complete the following information to identify and describe the model:

   Required fields display with **red** text and an asterisk * if the field is empty.

Notes:

- Idea Submission section has been removed in the 16.3 product release.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the model. Give the model a name that clearly indicates which projects use the model so Process Managers recognize the model to select when creating projects.
System Name	Enter a unique, shorter name that identifies the process model when importing and exporting models between environments.
Class	Select the class to which the model belongs. The class you select determines if the model is a gated or non-gated model, based on the process type defined in that class.

Field	Description
Description	*(Optional)* Enter a description of the purpose and use of the model. The description should provide additional details about the type of projects that are appropriate for this model.
Configuration Access Groups	Select the access group(s) to which this process model belongs. The access group(s) displayed are based on the current user's access group permissions and the process model defaults to the highest level access group listed. Note that the process model is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked. Edit the configuration access group on the Security tab of the process model.

4. Click **Create** to create the model.
5. On the **Process Definition** tab, complete the following information in the **Process Editor** section to define display and behavior for projects based on the model:

Field	Description
Name	Edit the name of the process model.
System Name	Edit the system name.
Class	Edit the class selection. To modify the class, the new selected class must have the same **Process Type**. If there are multiple classes of the same Process Type (gated, non-gated, idea), those classes display for selection. If there are no classes of the same Process Type, the field displays as read-only.
Description	Edit the description.
Project Name Metric	To set a project name automatically based on a metric value, click and select the metric that determines the name. Only metrics associated to the project are available for selection. If a metric is selected: • Ensure the metric required to set the project name is available for edit on the project creation page so the name can be populated accordingly. • Ensure that the selected metric's formula does not include the project name, or a metric that includes the project name. **Note:** If the metric's calculation returns no value, the project name is set to the class name.

Field	Description
	If a metric is selected here, the project name is read only within the project pages.
Project ID Metric	To set a project ID automatically based on a metric value, click  and select the metric that determines the ID. Only metrics associated to the project are available for selection. If a metric is selected: • Ensure that the metric required to set the project ID is available for edit on the project creation page so the ID can be generated accordingly. • Ensure that the selected metric's formula does not include the project ID, or a metric that includes the project ID. **Note:** If the metric's calculation returns no value, the project ID is set to the system project ID. If a metric is selected here, the project ID is read only within the project pages. If the **Auto-Generate Project IDs** system parameter is enabled, this option is not available.
Project Link Rules	Click **Project Link Rules** to define a set of rules and conditions that are used to link related projects for all projects that use this process model. See "Adding Project Links in Process Models" on page 87. You can only edit link rules for process models to which you have configuration access group rights. Only process models to which you have configuration access groups display for selection when linking related projects. However, you can edit rules linked to multiple models even if some models you only have view access groups rights to.
Active	Select this check box when the model is ready to use in projects.
Set gates page to read-only	If this is a gated model, select this option to disable the ability to edit gate content and gate dates within a project. Select this option only if you use other means to set project gate dates and decisions within the projects that use the model, such as using automated steps within workflows.
Default Project Manager	To set a default Project Manager for new projects created based on this model, select one of the following options: • **To assign a Project Manager automatically** - Select the **User** option and click  to select the Accolade user that will automatically be assigned as the Project Manager. • **To assign a Project Manager automatically based on a metric value** - Select the **Metric** option and click  to select a metric

Field	Description
	whose value determines the Accolade user that is assigned as the Project Manager. Selecting a metric enables automatic routing of ideas, concepts, and projects to the correct business leader based on other project criteria such as business area, product line, or geographic location. Only users assigned the Project Manager user role and only metrics associated to the model are available for selection. Process Managers can assign a different manager at the project-level after a project is created. Ensure metrics scheduled to calculate only on project create do not reference team leader metadata if the default project manager metric is set.
Default Currency	Select the default currency used in projects using this model. Process Managers can select a different currency at the project-level. This field is only available if a corporate currency is selected in the Accolade Administration Console.
Allow Mid-Process Project Start for Creation	If this is a gated model, select from the following options: • **No** - Projects created using this model start at the beginning of the process, and do not allow a project to start mid-process. This is the default setting. • **Select by Stage** - Projects created using this model can start in a selected stage within the process. Select this option if the model starts with a stage to ensure that projects can start at the beginning of the process. • **Select By Gate** - Projects created using this model can start in a selected gate within the process. Select this option if the model starts with a gate to ensure that projects can start at the beginning of the process.
Allow Mid-Process Start for Migration	If this is a gated model, select from the following options: • **No** - Projects migrated to this model start at the beginning of the process, and do not allow a project to start mid-process. This is the default setting. • **Select by Stage** - Projects migrated to this model can start in a selected stage within the process. Select this option if the model starts with a stage to ensure that projects can start at the beginning of the process. • **Select By Gate** - Projects migrated to this model can start in a selected gate within the process. Select this option if the model starts with a gate to ensure that projects can start at the beginning of the process.

Field	Description
Extend project edit rights	Select this check box to allow the extension of project edit rights to selected team members. When enabled, Project Managers can select team members who are allowed to edit information available on project page layouts, such as the **Project Home** page or any other custom project pages.

6. *(Optional)* Define the documents associated to the model in the **Form and Document Management** section with the following settings:

Field	Description
Idea Deliverable	Select the deliverable that contains the idea form to use as a template for users to complete when they submit ideas. **Note:** Each idea model must have at least one stage and one deliverable that contains the idea form.
Related Document Categories	Enter the list of categories that are available for related documents added to projects based on the model. Separate the list items using the pipe (|) character. For example, enter Specs|Designs|Schedules to create three categories that use those same names. If the model contains no categories, all related documents are added to the **Default** category.
Protect versions from deletion	Select this option to disable the deletion of all documents in a project. If set, users on a project cannot delete any deliverable, activity, related document, or gate document version. In addition, users cannot delete an activity if it contains a version. Selecting this option overrides any **Allow versions to be deleted** settings for individual deliverables, activities, and gate documents. To allow the deletion on an individual document basis, clear this option and set the **Allow versions to be deleted** option at the individual document level.
Hide the "Idea Type" column	Select if you only have one idea form. If you have more than one idea form, list this option so users can select the idea type they are submitting.
Hide the "Notify me of gate decisions about this idea" selection	Select to prevent users from receiving notifications about the progress of their idea.
Disable file attachments	Select to prevent users from uploading files when submitting ideas.

7. *(Optional)* Select the process model graphic style in the **Appearance** section after you create the model.
8. Click **Apply** to save your changes.

Notes:

- To delete a model, display the model and ensure the **Active** check box is cleared, then click **Delete**. If you need to clear the **Active** check box, click **Apply** to save the change, then click **Delete**. See "Process Model Best Practices" on page 19 before deleting models.
- To rename an existing model, access the model as described above, update the name in the **Name** field, and click **Apply**. Changes to the model name are made only to open projects.

Creating Process Models for Portfolio Projects

In Accolade, a portfolio is a collection of projects. The collection may include a project's related projects (through the Member Of link type) or it may include all the projects to which a Process Manager has Manage Process rights, which is considered the Process Manager's default portfolio.

As a Process Designer, define the models used for the parent projects that contain the collections.

To create a model for a project that contains a portfolio:

1. From the **System** menu, select **Process > All Models**.

   To narrow the process model list, search by the process model name, system name, or class.

2. Do one of the following:
   - **To add a new model** - Click **Add New** in the upper right corner of the page.
   - **To create a new model based on an existing model** - Click  in the **Copy** column to create a copy that can be used as a base to build a new model.
   - **To edit an existing model** - Click the name of the model to open it for editing.
3. Create or edit the model as a gated, non-gated, or an idea model with the following characteristics:
   - Select a class that has the **Is Portfolio** option selected.
   - Select the **Portfolio** option in the **Visible Tabs** field to ensure that the portfolio is available when viewing projects created using the model.
   - *(Optional)* If the model has a page layout assigned that includes a **Create Child Project** button, select a default model in the **Default Portfolio Model** field to use for projects created using that button.
4. Associate one or more metrics with the model with the following characteristics:
   - In **Presentation Settings**, select either **Show** or **Edit** for **Portfolio**.

     Number type metrics roll up from the projects in the portfolio to the parent project that uses this model. The roll up value is not editable in the parent project, even if set to **Edit**. Other types of metrics do not generate roll up values because they cannot be summed.
   - Ensure that the same metrics are associated with models for all projects that may be contained in the portfolio, along with the models for the parent project.
5. Click **Apply** to save your changes.

Notes:

- Accolade Portfolio Management and Portfolio Optimization are optional Accolade

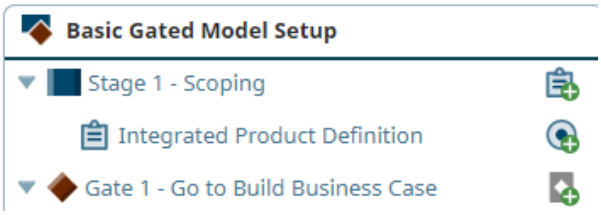
components that you may not have access to. To implement these solutions, contact Sopheon Customer Support.

Adding Stages to Process Models

In the Phase Gate process, stages represent the periods of a project when the project team is gathering information or developing phases of a product or service. In a gated model, a stage precedes each gate within the model and there can be up to 20 stage/gate pairs. Multiple stages in a row are not allowed. Models can also end in a stage, if necessary.

Important! After a model is active and assigned to a project, you can no longer add or remove stages or gates from the model. To add or remove a stage or gate after the model is in use, you must either create a copy of the model and make the changes in the copy, or delete all projects that use the model. If you create a copy, Project Managers can then migrate existing projects that need the additional stages or gates to a new model that contains the changes.

To add a stage to a model:



1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click  to add the stage, and enter the following information in the **Stage Editor** to identify the stage:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the stage. The name entered here not only defines the stage as you are creating the process model, it also displays within the project pages that show the process model stages and gates.
Description	Enter a description of the purpose and nature of the stage.

3. Click **Create** to create the stage.
4. *(Optional)* In the **Appearance** section, configure the stage icon and color scheme.

   The stage icon provides a graphical representation of the stage, while the state of the stage is represented in a color scheme, defined as a project moves through gates.
5. Click **Apply** to save your changes.

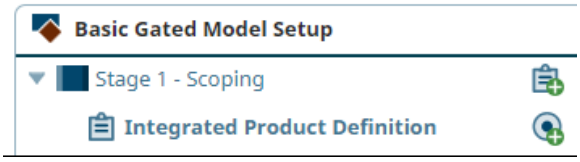
Adding Deliverables and Activities to Process Model Stages

A deliverable is a document or other item (such as a physical model or prototype) that contains information that gatekeepers use at gate meetings to decide whether to continue with a project. Process Designers add deliverables to stages within new and existing process models so the deliverables are available for each project based on the model.

An activity is a task required to complete a deliverable and can include documents as well. Activities are created the same as deliverables within the process model.

Note: The procedure below applies to all model types.

To add a deliverable or activity to a stage within a model:



1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
   - **To add a new deliverable** - In the Model tree, click next to the stage to add the deliverable to.
   - **To add a new activity** - In the Model tree, click next to the deliverable to which the activity applies.
   - **To edit an existing deliverable or activity** - Expand the stage or deliverable within the Model tree and select the deliverable or activity.
3. In the **Deliverable Editor** section, complete the following information to identify the deliverable or activity:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the deliverable or activity.
Description	Enter a description of the purpose or nature of the deliverable or activity. This description helps others identify the deliverable or activity within each project.
Order	Enter a number to specify the deliverable or activity's place when it displays in a list. Lower numbered deliverables or activities display higher in the list.
Restrict to These Roles	To restrict access to the deliverable or activity based on a user's assigned user role, select the user roles that can access the deliverable or activity. If restricted, only users with access group, project access, and one of the assigned user roles have access to the deliverable or activity through the project, search, and external links. Use this option to add an additional layer of security to certain documents required for a project, such as financial or business statements.

Field	Description
	Setting restrictions at the model level helps to ensure that portfolios and other projects are created in the correct access group location. If no restrictions are selected, projects that use this model can be created or moved to any access group a Process Manager or (Deprecated) Idea Manager has access to select.
User Function	If a person in a specific job role, such as an Accountant or an Engineer completes the deliverable or activity, select the job role's function from the drop-down list. Select the **Enforce function on user selection** check box to limit the selection of users for this deliverable or activity to those who have the function defined on the assignment. Selecting this option also disables the ability to change the function for the deliverable or activity and is enforced even if the function is inactive. To enforce user selection based on function for *all* deliverables, activities, workflow actions, and gatekeeper selections, use the **Enforce function on user selection** option for the model available on the Pages & Layouts tab within the model editor.
Conditional Rule	Select a conditional rule to apply to the deliverable or activity. If a condition is already applied, it will display in the field. To add a new condition, click **[Add New]** and complete the rule information. The newly created rule is automatically assigned to the deliverable or activity and displays on the **Conditions** tab of the model.
Configuration Access Groups	Select the access groups to which the deliverable or activity belongs. Process Designers with matching permissions will be able to edit and/or view the deliverable/activity. The access groups displayed are based on the current user's access group permissions and the access groups the process model belongs.

4. In the **Content and Workflow Options** section, define the contents of the deliverable:

Field	Description
Template	Click to select a template file from the Template Library to use for the deliverable or activity. Assigning a template to a deliverable or activity is optional. If the deliverable is stored outside of Accolade (as a link or web page), or if the deliverable or activity only requires entries in a quick grid, the deliverable does not need a template.

Field	Description
	Templates selected in this field are available for download from the All My Work page, the Stages page in a project, or from the Deliverable or Activity Details dialog box. (missing or bad snippet) If you use Microsoft Project to create Project plan templates, only plans uploaded to the Template Library that contain the model you are working in display for selection.
Link To	If the deliverable or activity is a continuation of a deliverable or activity from a previous stage (in gated and idea models), or if the contents of this deliverable or activity is the same as that from a previous stage in a model but still pertinent at a gate meeting, select the linked deliverable or activity from the drop-down list. For example, you may have a marketing deliverable in Stage 1 that gathers basic information on potential customers. You can link it to the marketing deliverable in Stage 2, where you want to gather more detailed information on the same customers. Creating a link is helpful if the same document applies to multiple stages or gate meetings, but is not necessarily developed from a template. Linking allows you to continue to build on a deliverable or activity's contents as a project progresses through stages and gates. **Note:** You can link to the latest version or the published version, but not to documents based on online forms (web documents) or a Microsoft Project plan template. Some browsers may treat this as a pop-up, if so disable pop-up blockers or make an exception for this occurrence.
Quick Grids	Click  and choose one or more quick grids to use for the deliverable or activity. To ensure that all data is entered in a deliverable or activity that uses the selected quick grid, select the **Disable Complete status when required data is missing** check box. When selected, the deliverable or activity cannot be set to **Completed** unless all the data fields set as required in the quick grid are completed. **Note:** Quick grids are only displayed if the user has edit access to the quick grid, the quick grid belongs to a child access group of the deliverable or activity's access group, or the quick grid is already attached to the deliverable or activity.

Field	Description
	Quick grids are only editable during the current stage. To continue to manage the metrics within a grid in other stages, add the quick grid to deliverables or activities in that stage, or link the deliverable or activity to a prior stage. To clear a selected quick grid, click and click next to the associated quick grid or click **Clear** to clear all of the selected grids.
Workflow	Click and choose a workflow to use for the deliverable or activity. If you specify a workflow in the model, the workflow is required for the deliverable or activity. *(Deliverables Only)* To prevent the workflow from starting until all the activities associated with the deliverable have the status **Completed** or **Not Required**, select the **Activities must be Completed or Not Required to start workflow** check box. If you select a Smart workflow that contains metrics to define rules, the metrics are automatically added to the process model.
Workflow Template	If the selected workflow contains an automated step to generate a PDF, click and select the workflow template file to use for the deliverable or activity. Templates in this field are not available for download from the All My Work page, Stages pages, or from the Deliverable or activity Details dialog box. (missing or bad snippet) If a template is selected here and in the **Template** field, workflow creators have the option to select which template to use when adding steps to the workflow configuration. Only templates assigned the Process Document (File) type are available for selection.
Publish On Upload	Select whether to publish the deliverable or activity when a user uploads new versions. The system default is based on the **Default New Versions to Published** system parameter. Selecting **Yes** or **No** potentially overrides the system parameter for the specific deliverable or activity. Activities added to deliverables in projects, however, respect the system parameter. Additionally, the publish setting does not apply to linked deliverables. The **Publish On Upload** field does not apply to deliverables and activities with WebDoc templates and is thus disabled.
Process Assistance URL	Enter the address for a website where the document owner can find information or perform research for this deliverable or activity.

Field	Description
	Adding a website here adds a **Process Assistance** button to the deliverable or activity detail page.

5. Select one or more of the "Allow" options to further define the deliverable or activity:

Option	Description
Allow "Not Required" status	*(Deliverables Only)* Select this check box if the deliverable can be optional for its gate meeting. Optional deliverables do not have to be completed for a project to be considered ready for its next gate meeting. If this check box is selected, the project manager or deliverable owner can select the **Not Required** status for this deliverable within a project. When a deliverable is not required, it does not trigger the warning icon on the Upcoming Gates page if it is incomplete.
Allow shared ownership by default	Select this check box to allow team members to assign and unassign themselves as the owner of the deliverable or activity. This is useful if more than one person needs to work on a deliverable or activity, and the deliverable or activity does not contain a workflow to route it for completion.
Allow versions to be deleted	Select this check box to allow the deletion of versions of the deliverable or activity. The **Protect versions from deletion** option in the model configuration overrides this setting and disables the deletion of any deliverable or activity in the project when selected. **Note:** This option is for team members working with a deliverable or activity. It does not apply to propagation when deleting a deliverable or activity from the model. **Note:** When the check box is enabled, a closed project can not be deleted. Uncheck the option to have the ability to delete any related documents.
Allow Lead/Manager and deliverable owner to delete activities	*(Deliverables Only)* Select this check box to allow the team leader and deliverable owner to delete the activities associated with the deliverable. If this check box is clear, only a Process Manager with Delete Activity rights can do so.

Option	Description
Hide related documents	Select this check box to prevent users from uploading related documents specifically for the deliverable or activity. Selecting this option ensures that team members cannot add or modify related documents during a workflow.
Disable "Complete" status when no document version is published	Select this check box to prevent users from changing the status to **Completed** when no document version is published.

6. In the **Default Start**, **Default Deadline** and **Default Finish Date** fields, indicate whether the deliverable or activity start, finish and end dates are entered manually or are relative to the days after the start of the deliverable, before a stage ends, or a percent of stage duration.

   Using the **Days before stage end**, **Days after start**, or **Percent of stage duration** allows the dates to shift depending on deliverable start and stage end dates for the project, without having to manually re-enter new dates. This shift is exclusive of the start date, hence this calculation applies after the specified start date. Also, if dates are manually updated in the project, the defaults specified in the process model will no longer be followed.

   EXAMPLE Example

   If a deliverable or activity does not start until 5 days before the gate meeting that follows the stage, select the **Days before stage end** option in the **Default Start Date** field and enter **5**. As the dates for the stage move, the start date for the deliverable or activity in the project is automatically recalculated to always be 5 days before the gate meeting, even if the gate meeting changes. And, as this calculation is exclusive of the start date, if the start date set is June 1, then the end date will be June 6.

7. *(Optional)* If one or more matrices are associated with the model, set matrix metric filters in the **Matrix Metric Filters** section.
8. Click **Create** to add the new deliverable or activity, or click **Save** to save changes to an existing deliverable or activity.
9. *(Optional)* Repeat this procedure to add activities required to complete the deliverable.

Notes:

- To rename an existing deliverable or activity, access the deliverable or activity within the model as described above, update the name in the **Name** field, and click **Apply**.
- If you modify an existing deliverable or activity definition within a model, the deliverable template or name in the model updates in projects before, but not after, a version of the

deliverable is uploaded in the project.

- To delete a deliverable or activity, display the deliverable or activity and click **Delete**.

Assigning Metric Filters in Matrices to Deliverables and Activities in Models

A matrix assigned to a deliverable or activity within a model can also include a filter (based on a filter metric). Using a filter metric on a matrix makes it possible for different document owners to edit different parts of the matrix based on the content of the filter metric.

Using a filter metric on a matrix within a model has the following requirements:

- The matrix must be associated to a model.
- The matrix must have at least one column selected as filterable. Only List type metrics can be used to filter a matrix.

When matrix filters are set as visible on a deliverable or activity, they are included in the deliverable or activity More Details section for the document within a project. Process Managers (and (Deprecated) Idea Managers for Idea projects) with Manage Process rights and the assigned Project Manager can change the filtering options for deliverables and activities within the project. The deliverable owner can change options for activities for their deliverable.

You can associate a matrix with a deliverable or activity without applying a filter. However, selecting the filtering options enables multiple users to view and update portions of a matrix without conflicts.

Example

Use matrix filtering to complete a Cost Savings Template:

- Brand Manager #1 is assigned to an activity for a deliverable and fills out required information for her brand.
- Brand Manager #2 is assigned to a separate activity for the same deliverable and fills out required information for his brand.
- Brand Manager #3 is assigned to another separate activity for the same deliverable and fills out required information for her brand.
- The deliverable that contains the activity aggregates values collected from all activities associated with the deliverable.

Use matrix filtering to complete a Financial Template that tracks values at each project stage:

- A Deliverable in Stage 1 saves numbers as a row in a matrix.
- The same deliverable is updated in Stage 2, but saves the numbers for that stage in a separate row of the same matrix, maintaining the values for Stage 1.
- The same deliverable is updated in Stage 3, but saves the numbers for that stage in another

separate row of the same matrix, maintaining the values for Stage 1 and Stage 2.

- Executives can run a report to show how these values change over the life of the project.

To assign a metric filter in a matrix on a deliverable or activity in a model:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. In the Model tree, expand the stage  and select the deliverable or activity.
3. Expand the **Matrix Metrics Filters** section at the bottom of the page to display the filter options.
4. *(Optional)* In the **Display in Project** column, select the check box to allow Project Managers, Deliverable Owners (for activities only), and Process Managers with Manage Process rights to update the matrix filter criteria within projects that use this model.

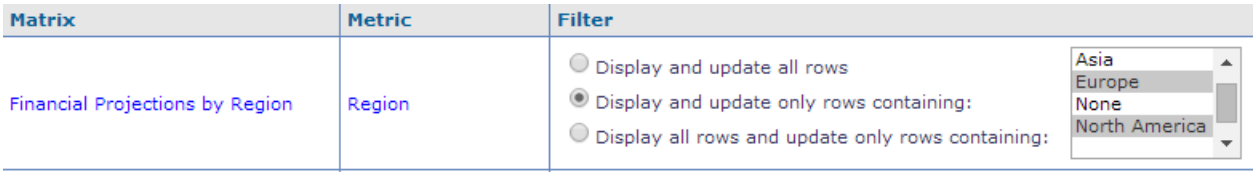
   Assignment owners without the rights outlined in step 5 do not have the ability to change the matrix filter criteria for his or her assignments.
5. In the **Filter** column for each selected matrix, select from one of the following options:
   - **Display and update all rows** - Select this option if the matrix is only available on this deliverable or activity within the stage and only one owner makes edits to the matrix. The filter options do not apply.
   - **Display and update only rows containing** - Select this option to limit the display to only the rows that the document owner can update. Select the filtering value when the matrix is in more than one deliverable.
   - **Display all rows and update only rows containing** - Select this option if the owner should see the entire matrix, but is only able update rows containing the selected values.

   Multiple values selected in a matrix are treated as "or" selections. If you select two or more matrix columns for filtering, the combinations of the columns is treated as an "AND" operation.

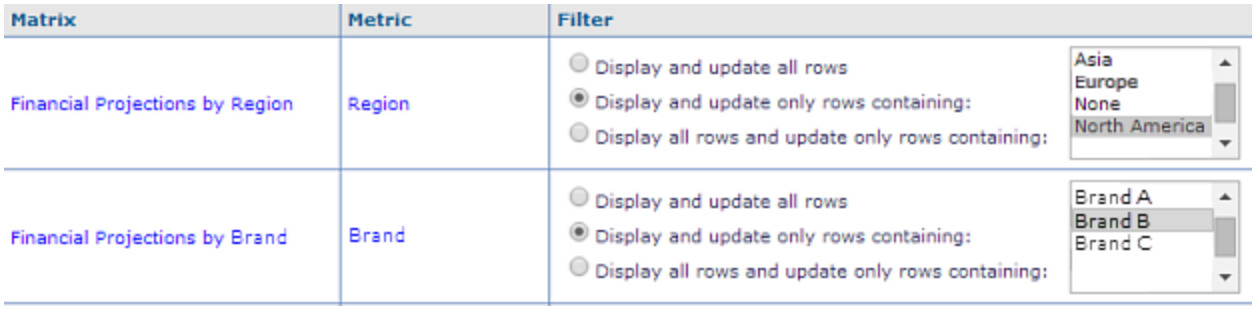
   

   Example

   In the following example, rows in the matrix where the region is set to North America *or* Europe are editable within the deliverable or activity, but not rows for Asia, as it is not selected.

   In the following example, rows in the matrix where the region is set to North America *and* the brand is set to Brand B are editable within the deliverable or activity. However, rows with North America Brands A or Brand C are not editable.



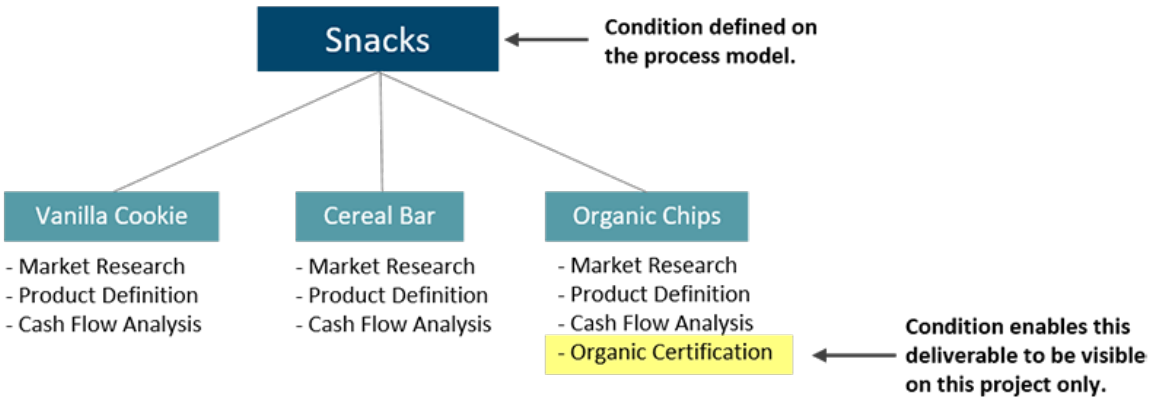
6. Click **Create** to add the new deliverable or activity, or click **Save** to save changes to an existing deliverable or activity.

   Create and upload a matrix template so the matrix is available within projects. Create the document template the same way as you would if using an unfiltered matrix.

Conditioning Deliverables and Activities Overview

Process Designers condition project deliverables and activities on the process model to control what displays in projects. Project team members only see certain deliverables and activities that apply to the project they are working in, even if the process model drives multiple types of projects. Conditioning deliverables and activities allows for model flexibility while still ensuring projects follow the same process from start to completion. A single process model can be used for different project types that may need different deliverables and activities.

For example, your company has a process model for the business unit of Snacks being launched in the market. Each project based off that model is a snack product that requires the same deliverables within each stage. In the example below, the snack projects are Vanilla Cookie, Cereal Bar, and Organic Chips. Organic Chips requires an extra deliverable of Organic Certification that the other non-organic projects don't require. Process Designers can configure a metric titled "organic" and a condition on the "Snacks" process model to include the extra deliverable for organic snack projects.



Conditioning a deliverable or activity requires two actions: creating the metric-driven rule that defines the condition, and assigning the rule to the appropriate deliverables and activities.

Important! The condition or rule metric must contain a value in order for the conditions to apply. If the metric value is empty or null, deliverables and activities show by default.

If deliverables and activities are conditioned to hide, they will be hidden across the system including the following locations:

- All My Work page
- Anywhere on projects
- Search
- Projects created in Accolade Portfolio Optimizer
- Accolade Office Extensions and Smart Office update of deliverables and activities.

- Recent Items
- Process Model upload/download
- Related Documents
- Project Gantt
- Gate Readiness pod in layouts
- Deliverable and activities with predecessors
- Timesheets
- Project Migration

Creating Deliverable and Activity Condition Rules

Deliverable and activity conditions are comprised of metric-driven rules that Process Designers create and assign to deliverables and activities. Condition rules have an assigned value that the metric must equal in order to show the deliverable or activity to which the rule is assigned.

Condition rules are applied as follows:

If "MetricName" = Value, the deliverable/activity is shown.

If "MetricName" ≠ Value, the deliverable/activity is hidden.

EXAMPLE Example

For example, a user has a Risk Evaluation deliverable that is only required for regional projects. The project includes a metric titled "Region" that is defined when the project is created.

To set up the condition rule, the user has created the rule named **"Region-China"** that references the metric **Region** with the condition value defined as **China**, and assigned this rule to the Risk Evaluation deliverable.

If the project "Region" value = China, the deliverable is *shown* on the project.

If the project "Region" value = Europe, the deliverable is *hidden* on the project.

In this example, if the deliverable is required in multiple regions, the user can create and apply additional rules to make the deliverable visible in the remaining regions.

To create a rule for deliverable and activity conditions:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Conditions** tab.

   The current list of condition rules is displayed in the **Conditional Rules** column, and any deliverables and activities with applied rules display in a tree structure in the main panel.
3. Click  to add a rule and complete the rule details.

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the rule. Sopheon recommends using a rule name that clearly indicates the rule's purpose. Once created, a conditional rule may be applied to restrict visibility to one or more deliverables, activities, and/or project page layouts that are included in a process model's configuration. EXAMPLE Example For example, creating a conditional rule with the name "Market=International" that indicates the metric and required value for the rule allows one rule to control multiple configuration components that are used or displayed only for projects created for this market.
System Name	Enter a unique, shorter name that identifies the rule in queries, reporting views, field codes, and other places in Accolade. The name must be unique among condition rules and can contain only letters (English alphabet), numbers, and the underscore.
Metric	Click to select the metric that defines the rule. In the Metric Select dialog, choose the metric category and search for the appropriate metric. Once selected, click **Done** to add the metric. Note that string and list metrics are the only metric data types allowed. Calculated metrics can be used to create complex rules that incorporate other metric data types. The calculated metric, however, must still return a string or list value.
Condition Value	Enter a value the selected metric must equal in order to show the deliverable or activity. The conditional value is not case sensitive to the metric value set.

4. Click **Done** to add the rule.

   The condition rule is added to the **Conditional Rules** column and displays with the system name and metric conditional value listed underneath.

5. Continue creating additional rules or start assigning conditions to deliverables and activities as necessary.

Notes:

- The metric referenced by the condition rule must be associated with the process model and must contain a value in order for the conditions to apply to the project. If the project metric value is empty or null, project pages will default to show in all open projects.
- To delete a rule, click  next to the rule in the list on the left. Deleting the rule also clears its associations to deliverables, activities, or other components and thus shows the deliverables and activities in projects.
- To edit a rule, click  to display the rule details, make the necessary changes, and click **Done**.

   It is best practice to not edit condition rules once they are assigned. If a rule is no longer in use or valuable, delete the rule. Understand that any changes to a rule definition after it is assigned will trigger recalculations across projects and show/hide information accordingly.

Assigning Conditions to Deliverables and Activities

Process Designers assign condition rules to deliverables and activities in the process model to set visibility. Condition rules use metric values that are defined when the rule is created. The metric value determines whether the assigned deliverable or activity displays in projects. Deliverables and activities with no rules assigned to them show by default. Rules must be defined before assigning the rule to deliverables and activities.

To assign a condition rule to deliverables and activities:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Conditions** tab.

   The current list of condition rules is displayed in the **Conditional Rules** column, and any deliverables and activities with applied rules display in a tree structure in the main panel. Additionally, the access group to which the deliverable or and activities belongs displays below the deliverable or activity.

    For easier readability, use the **Expand All** and **Collapse All** buttons to view deliverables and activities in each stage. Additionally, clicking the filter icon will only show the deliverables and activities with the current rule applied.

3. Select a rule to assign or create a new rule.

   If the rule has previously been assigned to deliverables and activities, the deliverables and activities display bold.

4. Assign the rule by selecting the check box next to the deliverable or activity.

Activities that do not have assigned rules respect the condition behavior of the parent deliverable. However, if activities have assigned rules, they may act independently of the deliverable. Deliverables and activities with no rule assignments show by default.

5. Click **Apply** to save your changes.

   Continue assigning condition rules to deliverables and activities as necessary. Assign one rule at a time, clicking **Apply** to commit changes before moving on to the next rule to ensure pending changes are saved.

Notes:

- The metric referenced by the condition rule must be associated with the process model and must contain a value in order for the conditions to apply to the project. If the project metric value is empty or null, project pages will default to show in all open projects.
- To clear rule assignments, select a rule and click **Deselect All** and **Apply**. This removes the rule from any deliverable and activity it was previously assigned to. The deliverable or activity displays in projects until another rule is assigned.
- To delete a rule, click  next to the rule in the list on the left. Deleting the rule also clears its associations to deliverables, activities, or other components and thus shows the deliverables and activities in projects.
- To edit a condition rule, click  to display the rule details, make the necessary changes, and click **Done**.

   It is best practice to not edit condition rules once they are assigned. If a rule is no longer in use or valuable, delete the rule. Understand that any changes to a rule definition after it is assigned will trigger recalculations across projects and show/hide information accordingly.

How Conditioned Deliverables and Activities Display in Projects

Process Designers create and assign deliverable and activity conditions to control what displays in projects. Conditioned deliverables and activities display in projects based on metric-driven rules that determine the visibility. Condition rules have an assigned value that the metric must equal in order to show the deliverable or activity to which the rule is assigned. However, there are certain restrictions for the visibility behavior beyond meeting the condition value.

Deliverables and activities must meet the following criteria in order to be hidden on projects:

- Be in an open project.
- Have a status of **Not Started** or **Not Required**.
- Have no work in progress (a workflow, document version etc.).
- Have a condition value that is *not* met.

Additionally, consider the information below that also dictates visibility behavior of conditioned deliverables and activities:

- Conditions only apply to open projects. Closed and deleted projects are unchanged.

  If a project is re-opened, metrics recalculate and conditions will apply to the current and future stages.

- The condition or rule metric must contain a value in order for the conditions to apply. If the metric value is empty or null, deliverables and activities show by default. Metrics tied to conditions must be updated on the project.
- Deliverables and activities with no rules assigned to them show on all projects.

  Activities that do not have assigned rules respect the condition behavior of the parent deliverable. If activities have rules assigned to them, they may act independently of the parent deliverable, however activities will not be orphaned by condition visibility. If an activity should show according to the assigned condition, but the deliverable is hidden, the activity will also be hidden.

  Ad-hoc activities cannot have conditions, and will respect the visibility of the parent deliverable.

- Conditions only apply to deliverables and activities with a status of **Not Started** or **Not Required**. If a deliverable or activity has a status of **In Progress** or **Completed**, it will show regardless of the condition. Custom deliverable and activity statuses are treated as an **In Progress** status and thus shown.
- Deliverables and activities with work in progress (a workflow, document version etc.) stay visible and do not respect conditions.
- Any related documents on a deliverable or activity that becomes hidden are moved to the project **Related Documents** page. If a deliverable or activity become visible again, the related documents on the deliverable/activity display.
- If a new condition is applied at the process model level, it will be applied to all stages of existing projects, regardless of the current stage. If a project has completed and/or locked stages, the rule will still be applied to the deliverable or activity, however the stage will remain completed and/or locked.
- If a project metric is changed and the change triggers a conditional rule to hide or show a deliverable or activity, the rule will be applied to the current and future stages. Completed stages and locked stages will remain unchanged.

Condition Visibility Examples

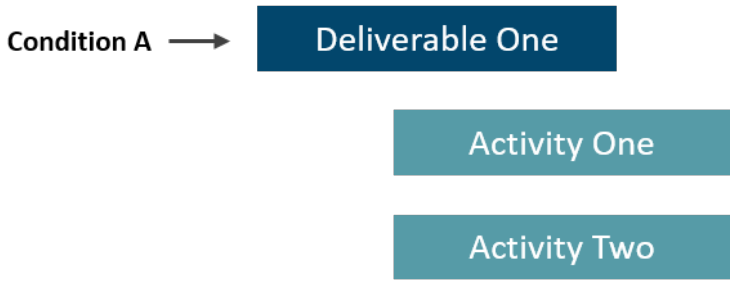
Consider different scenarios to further understand how deliverables and activities are conditioned. For each scenario, the deliverable and activity statuses are either **Not Required** or **Not Started**. There is also no work in progress for either the deliverable or activities. They are in an open project and in a future stage.

In general, if the condition value is not met (False), the deliverable or activity is hidden. If the condition value is met (True), the deliverable or activity is shown.

Scenario - Condition on a deliverable only. Activities do not have conditions.

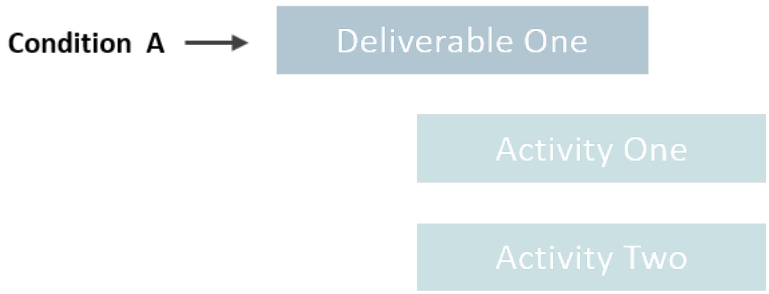
Condition Value Met for Deliverable: TRUE

Deliverable One shows because Condition A metric value equals the assigned rule. Activity One and Two show because they do not have conditions and respect the visibility of the parent deliverable.



Condition Value Met: FALSE

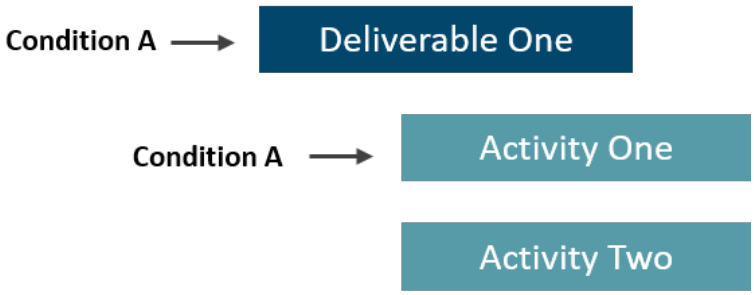
Deliverable One is hidden because Condition A metric value does not equal the assigned rule. Activity One and Two are hidden because they cannot be orphaned and thus respect the visibility of the parent deliverable.



Scenario - Same condition on a deliverable and activity.

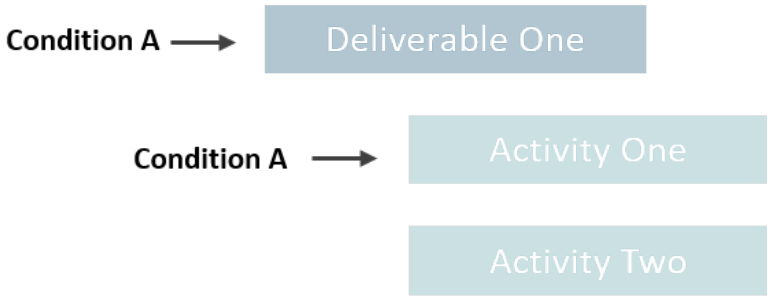
Condition Value Met for Deliverable/Activity: TRUE

Deliverable One and Activity One show because Condition A metric value equals the assigned rule. Activity Two shows because it does not have conditions and respects the visibility of Deliverable One.



Condition Value Met for Deliverable/Activity: FALSE

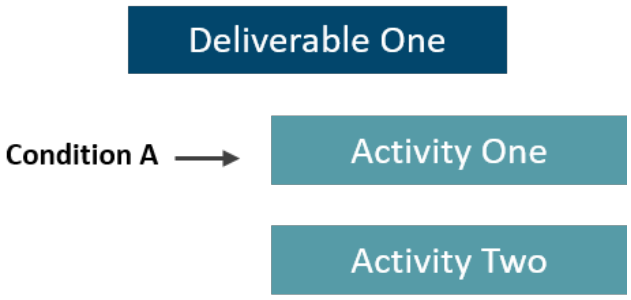
Deliverable One and Activity One are hidden because Condition A metric value does not equal the assigned rule. Activity Two is hidden because it cannot be orphaned and thus respects the visibility of Deliverable One.



Scenario - Condition on an activity only. No condition on the parent deliverable.

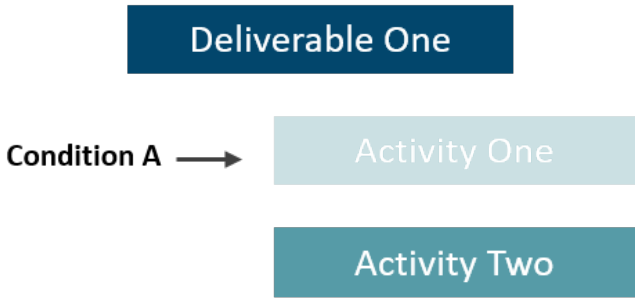
Condition Value Met for Activity: TRUE

Activity One shows because its condition, Condition A, metric value equals the assigned rule. Deliverable One and Activity Two show because they do not have conditions applied.



Condition Value Met for Activity: FALSE

Activity One is hidden because Condition A metric value does not equal the assigned rule. Deliverable One and Activity Two show because they do not have conditions applied.

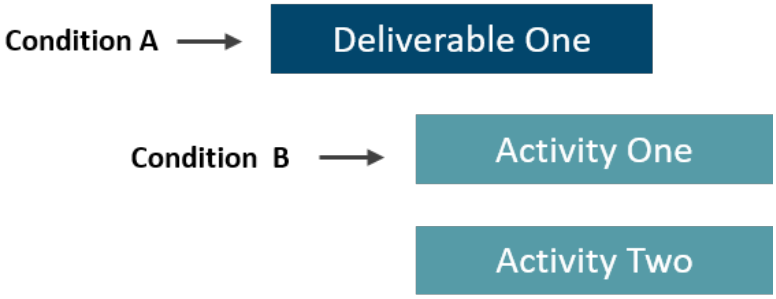


Scenario - Different conditions on a deliverable and child activity.

Condition Value Met for Deliverable: TRUE

Condition Value Met for Activity: TRUE

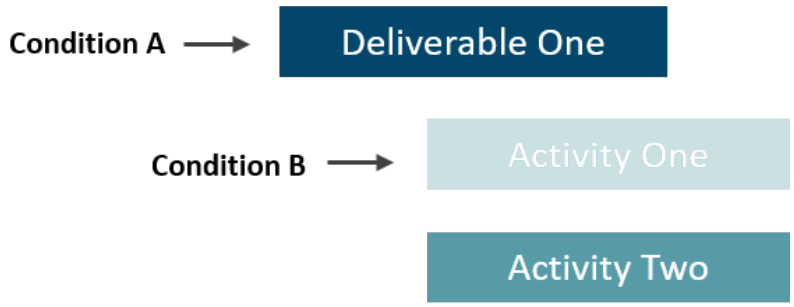
Deliverable One and Activity One show because Condition A and Condition B metric values equal the assigned rule. Activity Two shows because it does not have conditions applied.



Condition Value Met for Deliverable: TRUE

Condition Value Met for Activity: FALSE

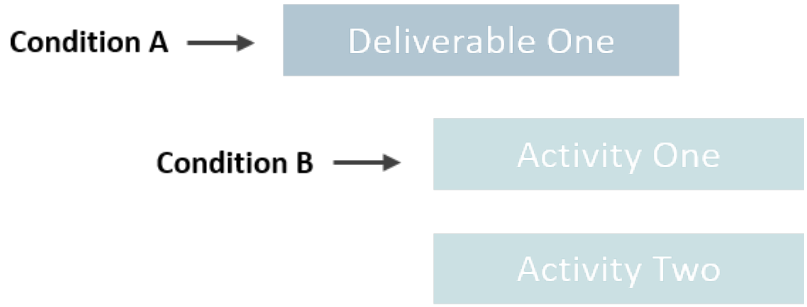
Activity One is hidden because its condition, Condition B, metric value does not equal the assigned rule. Deliverable One shows because Condition A metric value equals the assigned rule. Activity Two shows because it does not have conditions applied.



Condition Value Met for Deliverable: FALSE

Condition Value Met for Activity: TRUE

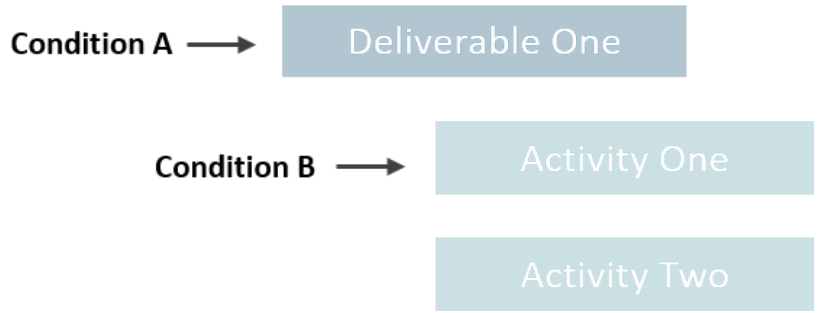
Deliverable One is hidden because its condition, Condition A, metric value does not equal the assigned rule. Activity One is hidden because even though its condition equals the assigned rule, it cannot be orphaned and thus respects the visibility of the parent deliverable. Activity Two is hidden because it cannot be orphaned and thus respects Deliverable One visibility.



Condition Value Met for Deliverable: FALSE

Condition Value Met for Activity: FALSE

Deliverable One and Activity One are hidden because their condition metric values do not equal the assigned rule. Activity Two is hidden because it cannot be orphaned and thus respects Deliverable One visibility.



The following table outlines scenarios for deliverable and activity conditions. The scenarios below are true for open projects and unlocked stages.

Deliverable/Activity Scenario	Deliverable Condition Value Met	Deliverable Status	Activity Condition Value Met	Activity Status	Show/Hide	Additional Notes
Condition Rule Assigned To: Deliverable						
No activities on the deliverable.	False	Not Started Not Required	N/A	N/A	Deliverable Hidden	
	False	In Progress Completed Custom	N/A	N/A	Deliverable Shown	Shown due to deliverable status.
	True	Not Started Not Required	N/A	N/A	Deliverable Shown	
	True	In Progress Completed Custom	N/A	N/A	Deliverable Shown	
Condition Rule Assigned To: Deliverable and Activity						
One activity on the deliverable that has the same condition rule as the parent deliverable.	False	Not Started Not Required	False	Not Started Not Required	Deliverable Hidden Activity Hidden	
	False	Not Started Not Required	False	In Progress Completed Custom	Deliverable Shown Activity Shown	Shown due to activity status.
	False	In Progress	False	Not Started	Deliverable	Deliverable

Deliverable/Activity Scenario	Deliverable Condition Value Met	Deliverable Status	Activity Condition Value Met	Activity Status	Show/Hide	Additional Notes
		Completed Custom		Not Required	Shown Activity Hidden	shown due to status.
	False	In Progress Completed Custom	False	In Progress Completed Custom	Deliverable Shown Activity Shown	Shown due to status.
	True	Not Started Not Required	True	Not Started Not Required	Deliverable Shown Activity Shown	
	True	Not Started Not Required	True	In Progress Completed Custom	Deliverable Shown Activity Shown	
	True	In Progress Completed Custom	True	Not Started Not Required	Deliverable Shown Activity Shown	
	True	In Progress Completed Custom	True	In Progress Completed Custom	Deliverable Shown Activity Shown	
Condition Rule Assigned To: Deliverable						
One ad-hoc activity on the deliverable.	False	Not Started Not Required	N/A	Not Started Not Required	Deliverable Hidden Activity Hidden	Activity follows the parent deliverable visibility and is thus hid-

Deliverable/Activity Scenario	Deliverable Condition Value Met	Deliverable Status	Activity Condition Value Met	Activity Status	Show/Hide	Additional Notes
						den. Activities will not be orphaned.
	False	Not Started Not Required	N/A	In Progress Completed Custom	Deliverable Shown Activity Shown	Deliverable shown due to activity status. Activities will not be orphaned.
	False	In Progress Completed Custom	N/A	Not Started Not Required	Deliverable Shown Activity Shown	
	False	In Progress Completed Custom	N/A	In Progress Completed Custom	Deliverable Shown Activity Shown	
	True	Not Started Not Required	N/A	Not Started Not Required	Deliverable Shown Activity Shown	
	True	Not Started Not Required	N/A	In Progress Completed Custom	Deliverable Shown Activity Shown	
	True	In Progress Completed	N/A	Not Started Not Required	Deliverable Shown Activity	

Deliverable/Activity Scenario	Deliverable Condition Value Met	Deliverable Status	Activity Condition Value Met	Activity Status	Show/Hide	Additional Notes
		Custom			Shown	
	True	In Progress Completed Custom	N/A	In Progress Completed Custom	Deliverable Shown Activity Shown	
Condition Rule Assigned To: Activity Only						
No rule assigned to the parent deliverable.	N/A	Not Started Not Required	False	Not Started Not Required	Deliverable Shown Activity Hidden	
	N/A	Not Started Not Required	False	In Progress Completed Custom	Deliverable Shown Activity Shown	
	N/A	In Progress Completed Custom	False	Not Started Not Required	Deliverable Shown Activity Hidden	
	N/A	In Progress Completed Custom	False	In Progress Completed Custom	Deliverable Shown Activity Shown	
	N/A	Not Started Not Required	True	Not Started Not Required	Deliverable Shown Activity Shown	
	N/A	Not Started Not	True	In Progress Com-	Deliverable Shown	

Deliverable/Activity Scenario	Deliverable Condition Value Met	Deliverable Status	Activity Condition Value Met	Activity Status	Show/Hide	Additional Notes
		Required		pleted Custom	Activity Shown	
	N/A	In Progress Completed Custom	True	Not Started Not Required	Deliverable Shown Activity Shown	
	N/A	In Progress Completed Custom	True	In Progress Completed Custom	Deliverable Shown Activity Shown	
Condition Rule Assigned To: Deliverable and Activity						
Parent deliverable and child activity have different conditions.	False	Not Started Not Required	False	Not Started Not Required	Deliverable Hidden Activity Hidden	
	False	Not Started Not Required	False	In Progress Completed Custom	Deliverable Shown Activity Shown	Deliverable shown due to activity status. Activities will not be orphaned.
	False	In Progress Completed Custom	False	Not Started Not Required	Deliverable Shown Activity Hidden	
	False	In Progress Completed	False	In Progress Completed	Deliverable Shown Activity	

Deliv-erable/Activity Scenario	Deliv-erable Condition Value Met	Deliv-erable Status	Activity Condi-tion Value Met	Activity Status	Show/Hid-e	Additional Notes
		Custom		Custom	Shown	

Deliverable/Activity Scenario	Deliverable Condition Value Met	Deliverable Status	Activity Condition Value Met	Activity Status	Show/Hide	Additional Notes
	False	Not Started Not Required	True	Not Started Not Required	Deliverable Hidden Activity Hidden	Activity is hidden because it cannot be orphaned and thus respects the visibility of the parent deliverable.
	False	Not Started Not Required	True	In Progress Completed Custom	Deliverable Shown Activity Shown	Deliverable shown due to activity status. Activities will not be orphaned.
	False	In Progress Completed Custom	True	Not Started Not Required	Deliverable Shown Activity Shown	
	False	In Progress Completed Custom	True	In Progress Completed Custom	Deliverable Shown Activity Shown	
	True	Not Started Not Required	False	Not Started Not Required	Deliverable Shown Activity Hidden	
	True	Not Started	False	In Pro-	Deliv-	Activity

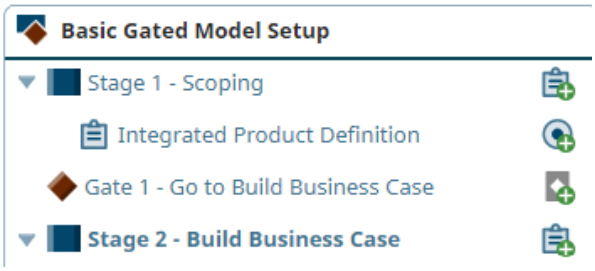
Deliv-erable/Activity Scenario	Deliv-erable Condition Value Met	Deliv-erable Status	Activity Condi-tion Value Met	Activity Status	Show/Hid-e	Additional Notes
		ted Not Required		gress Com-pleted Custom	erable Shown Activity Shown	shown due to status.
	True	In Pro-gress Com-pleted Custom	False	Not Star-ted Not Required	Deliv-erable Shown Activity Hidden	
	True	In Pro-gress Com-pleted Custom	False	In Pro-gress Com-pleted Custom	Deliv-erable Shown Activity Shown	
	True	Not Star-ted Not Required	True	Not Star-ted Not Required	Deliv-erable Shown Activity Shown	
	True	Not Star-ted Not Required	True	In Pro-gress Com-pleted Custom	Deliv-erable Shown Activity Shown	
	True	In Pro-gress Com-pleted Custom	True	Not Star-ted Not Required	Deliv-erable Shown Activity Shown	
	True	In Pro-gress Com-pleted Custom	True	In Pro-gress Com-pleted Custom	Deliv-erable Shown Activity Shown	

Adding Gates to Process Models

In the Phase Gate process, gates represent the decision points throughout the process flow. Gatekeepers review deliverables from the previous stages and make decisions about whether to continue with the project. In gated models, a gate follows each stage. Models can also start with a gate, if necessary.

Important! After a model is active and assigned to a project, you can no longer add or remove stages or gates from the model. To add or remove a stage or gate after the model is in use, you must either create a copy of the model and make the changes in the copy, or delete all projects that use the model. If you create a copy, Project Managers can then migrate existing projects that need the additional stages or gates to a new model that contains the changes.

To add a gate to a model:



1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click to add the gate, and enter the following information in the **Gate Editor** to identify the gate:

Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the gate. The name entered here not only defines the gate as you are creating the process model, it also displays within the project pages that show the process model stages and gates.
Description	Enter a description of the purpose and nature of the gate. This description helps others identify the gate within each project.
Layout	Select a layout from the drop-down to display as the gate page in projects that use the model. Only active layouts which the user has "Can Edit" rights to and are within the model's access group display as selectable options. On newly gates, the system assigns the **Project Gates** layout by default.
Default Gate Owner	Select a default gate owner option to add a default owner that is assigned to the gate when a project is created.

Field	Description
	The gate owner enters gate details, assigns gatekeepers, selects the gate decision that was reached at the meeting, and manages gate documents. • **Project Manager** - The assigned Project Manager is the default owner. If you select the Project Manager as the default owner, the Project Manager must have the Gate Manager or Process Manager user role (in addition to Project Manager) to actually be assigned as gate owner in the project. • **Project Creator** - The Process Manager who creates the project is assigned as the default owner. Leave this option set to **None** to not automatically assign a gate owner when the project is created. An owner must be assigned at the project level. Process Managers can select a different gate owner at the project level, even if you select a default gate owner for the gate in the model.
Gate Date Metric	Click to select a metric to be used to set the gate date. Gate dates can be set either manually within the project or using a metric. You can use any date type metric.
Min Gate Date Metric	Click to select a metric that sets the minimum date that this gate can be set to in a project. The date for this gate must fall on or after the date that the selected metric sets.This setting applies only to gate date changes made in the project process graphic, Project Gate, or Project Gantt. The setting does not apply to dates set through workflow automation, or if a metric is selected in the **Set Gate Date** field of the metric configuration. To define an allowed range of dates for the gate, also select a metric in the **Max Gate Date Metric** field.
Max Gate Date Metric	Click to select a metric that sets the maximum date that this gate can be set to in a project. The date for this gate must fall on or before the date that the selected metric sets. This setting applies only to gate date changes made in the project process graphic, Project Gate, or Project Gantt. The setting does not apply to dates set through workflow automation, or if a metric is selected in the **Set Gate Date** field of the metric configuration.

Field	Description
	To define an allowed range of dates for the gate, also select a metric in the **Min Gate Date Metric** field.
Set Gate Date at Project Creation	Select whether to allow or require the Process Manager to enter the gate date when creating the project: • **Allow on project creation** - Select this option to allow the Process Manager to enter this gate's date when creating the project. • **Require on project creation** - Select this option and the previous check box to require the Process Manager to enter the gate date when creating the project. **Note:** For projects created from an idea submission, these settings only apply if projects are created from idea submission functionality enabled on custom project pagescustom project pages.

3. In the **Gatekeepers** section, select how gatekeeper votes are handled for this gate.
   - **Require Gatekeeper approval** - Select this option to require the gatekeepers to vote in Accolade on this gate decision.
   - **Automatically set gate decision upon approval** - If you selected the Require Gatekeeper Approval option, select this option to enter the gate decision after the gatekeepers unanimously approve the decision. Clear the check box to require the gate owner to enter the gate decision.
   - **Allow gate owner to skip a vote** - If you selected the Require Gatekeeper Approval option, select this option to allow the gate owner to skip a gate vote for this gate.

     Note: If the **Set Gates Page to read-only** option for the model is selected, gatekeeper voting is not available.

4. Define and add gatekeepers for this gate.

   Only users with the Executive user role are available for selection as gatekeepers. A gate owner or the Process Manager can define or change the gatekeeper assigned for the gate at the project level. However, if functions are not defined for the gate in the model, no gatekeeper selections are available in the project.

   To enforce user selection based on function for all deliverables, activities, workflow actions, and gatekeeper selections, use the **Enforce function on user selection** option for the model available on the Pages & Layouts tab within the model editor.

   Select one or more of the following options:
   - Select the function of each gatekeeper for this model in the drop-down.
   - Click  and select a user to acts as a gatekeeper for the function.

- Select the **Enforce function** check box to limit the selection of users for the gatekeeper function to those who have the function defined.

  Selecting this option also disables the ability to change the function for the gate and is enforced even if the function is inactive.

- Click  to add additional gatekeepers as necessary.

If you select a gatekeeper but no function for a gate, the Process Manager can select a different gatekeeper with any function for that position in the project. The function remains listed as **[None]**.

5. In the **Advanced** section, define gate decision behavior and the message for the gate decision.

Field	Description
Automated Conditions	To automate entering a gate decision, define the set of conditions that must be met within a project to set each gate decision type. Automating gate decisions removes the need to manually enter the gate decision, or to configure gatekeeper voting. A Conditional Go decision cannot be set using an automated gate decision and event reasons are not captured for automated gate decisions. Setting gate decisions to set automatically does not prevent a gate owner from entering a decision manually and updating gate details. To ensure that gate details are not modified after setting the gate decision, consider setting the gate data to read-only using the **Set Gates Page to read-only** option in the process model. Workflows can also be configured to automatically set a gate decision using an automated step. Sopheon recommends using the **Automated Gate Decision Rules** settings within the process model or workflow automated steps to automate gate decisions, but not both.
Required Conditions	Define a set of conditions that must be met within a project for a Go or Conditional Go gate decision to be entered for the gate. Setting a restriction here can help to ensure that certain deliverables, activities, and metrics are complete within a project, or a set of portfolio projects, before entering a Go or Conditional Go decision that advances the project to the next stage.
Message Metric	Click  and select a metric (typically a String or Long String metric) that contains information about what is required to set a Go or Conditional Go decision. The text within the metric displays in a message in the project when setting the gate decision to Go or Conditional Go if there are conditions defined.

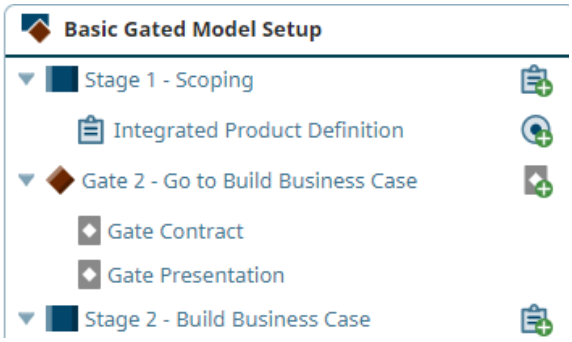
6. Click **Create** to create the gate.
7. *(Optional)* In the **Appearance** section, configure the gate image and color scheme.

   The gate image and color scheme provides a graphical representation of the gate as a project moves through phases.
8. Click **Apply** to save your changes.

Adding Gate Documents to Process Model Gates

A gate document is a project document that is stored as part of a specific gate. Gate documents contain information related to the gate, for example meeting notes and scorecards, can be automatically generated using templates and field codes to populate the document information.

To add a gate document to a model:



1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
   - **To add a new gate document** - In the Model tree, click next to the gate to add the gate document.
   - **To edit an existing gate document** - Expand the gate within the Model tree and select the gate document.
3. Complete the following information to identify the gate document:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the gate document.
Description	Enter a description of the purpose or nature of the gate document. This description helps others identify the document within each project.
Order	Enter a number to specify the gate document's place when it displays in a list. Lower numbered gate documents display higher in the list.
Configuration Access Groups	Select the access group(s) to which the gate document belongs. Process Designers with matching permissions will be able to edit and/or configure the gate document. The access groups displayed are based on the current user's access group permissions and the access groups the process model belongs.

4. In the **Content and Workflow Options** section, define the contents of the gate document:

Field	Description
Template	Click to select a template file from the Template Library to use for the gate document. (missing or bad snippet)

Field	Description
	Gate document templates must be Process Documents (file) templates.
Allow versions to be deleted	Select this check box to allow the deletion of versions of the gate document.

5. Click **Create** to add the new gate document, or click **Save** to save changes to an existing gate document.

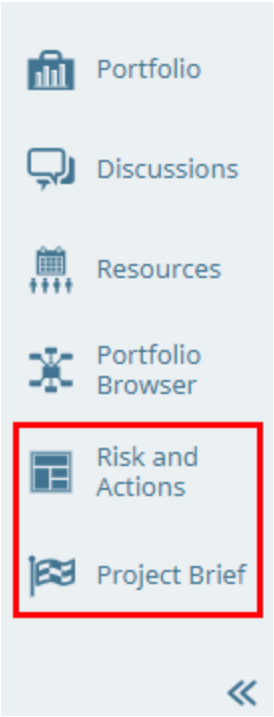
Notes:

- To rename an existing gate document, select the gate document within the model, as described above, update the name in the **Name** field, and click **Apply**.
- To delete a gate document, select the gate document within the model as described above, and click **Delete**.
- To move a gate document to a different gate, delete the document from the original gate and add it to the new gate.

Adding Page Layouts as Project Pages

For a page layout to be included as a page within a project, you must add the layout to a process model as a visible tab within the project. If you have created a page layout that represents a project dashboard, you can set the layout page as the initial page to display within a project.

To add a page layout as a project page:



1. From the **Process** menu, select **Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Pages & Layouts** section.

   The current list of available page layouts is displayed.
3. *(Optional)* If there are additional custom page layouts that are not included in the list, click and use the following options to add the additional layouts to the list.
   - To narrow the layouts list, search by the layout name, system name, or category.
   - Highlight the layout name(s) in the Available Layouts window and click **Select**, or double-click each layout's name to move them from the **Available** list to the **Selected** list.
   - Click **Clear** in the to remove all layouts from the list of available project pages.
   - Click **Done** to exit the dialog.
4. Choose one or more of the following selections to define the project page display options:

Field	Description
Landing	Select the project page that opens initially when a user goes to a project based on this model. The page you select as the landing page determines the entry project page for users even if that page is not selected to be visible.
Visible	Select which pages are available for viewing in a project based on this model. By default, active system layouts, such as **Project Home** and **Project Gates**, display at the top of the project navigation pane. All other custom project pages created using layouts and set as visible display below the system project pages in the project navigation pane based on the layout's assigned order. If you select only one project page or layout to be visible, the navigation pane does not display in the project. Once you select a second project page or layout to be visible, the navigation pane will display.

5. *(Optional)* In the Assigned Rule column, enter a condition rule to be applied to the layout.
6. *(Optional)* In the Roles column, define any role restrictions to be applied to the layout.

7. *(Optional)* Drag and drop the pages into new locations within the list to customize the order to be displayed on the project page.
8. Click **Apply** to save your changes.
9. Open or create a project that uses the process model to display view how the page layout looks as a project page.

Creating Project Pages Condition Rules

Project page conditions are comprised of metric-driven rules that Process Designers create and assign to project pages layouts in a process model configuration. When a condition rule is assigned to a project page layout, the metric has an assigned value it must equal in order for the project page to display for users with selected Accolade roles when viewing the project.

Condition rules are applied as follows:

If "MetricName" = Value, the project page is shown.

If "MetricName" ≠ Value, the project page is hidden.

EXAMPLE Example

For example, a user has multiple divisions that use the same process model for new projects. The process model includes a Risk Evaluation project page layout which is only used by the Appliance division to display pertinent information for their project evaluation. The project includes a metric titled "Division" that is defined when the project is created.

To set up the condition rule, the user has created the rule named **"Division=Appliances"** that references the metric **Division** with the condition value defined as **Appliances**, and assigned this rule to the Risk Evaluation project page layout.

If the project "Division" value = Appliances, the Risk Evaluation project page is *shown* on the project.

If the project "Division" value = Furniture, the Risk Evaluation project page is *hidden* on the project.

> **Note:** A project page layout can only have one condition rule applied. In this example, if multiple divisions (but not all) would want to display the Risk Evaluation project page layout, they would either need to include separate copies of the layout with conditional rules applied to each layout, or the user would need to identify a different metric that associates the divisions for use in applying the conditional rule.

To create a rule for project page conditions:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Pages & Layouts** section.

   The current list of available project page layouts is displayed, along with any applied role restrictions and condition rules.

3. Locate the project page layout you wish to apply the conditional rule to. In the Assigned Rule column, click **Click to edit** and select **New Rule**.

   To select an existing rule, click **Existing Rule** and select the applicable rule from the drop-down list.

4. Enter the following details to define the new rule:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the rule. Sopheon recommends using a rule name that clearly indicates the rule's purpose. Once created, a conditional rule may be applied to restrict visibility to one or more deliverables, activities, and/or project page layouts that are included in a process model's configuration. EXAMPLE Example For example, creating a conditional rule with the name "Market=International" that indicates the metric and required value for the rule allows one rule to control multiple configuration components that are used or displayed only for projects created for this market.
System Name	Enter a unique, shorter name that identifies the rule in queries, reporting views, field codes, and other places in Accolade. The name must be unique among condition rules and can contain only letters (English alphabet), numbers, and the underscore.
Metric	Click to select the metric that defines the rule. In the Metric Select dialog, choose the metric category and search for the appropriate metric. Once selected, click **Done** to add the metric. Note that string and list metrics are the only metric data types allowed. Calculated metrics can be used to create complex rules that incorporate other metric data types. The calculated metric, however, must still return a string or list value.
Condition Value	Enter a value the selected metric must equal in order to display the project page. The conditional value is not case sensitive to the metric value set.

5. Click **Done** to add the rule.

   The condition rule is added to the **Assigned Rule** column for the selected project page layout.
6. Click **Apply** to save your changes.

Notes:

- The metric referenced by the condition rule must be associated with the process model and must contain a value in order for the conditions to apply to the project. If the project metric value is empty or null, project pages will default to show in all open projects.
- To change the rule that is currently applied to a project page layout, click the name of the rule that is currently applied. In the Manage Conditional Rule dialog box, either select a different existing rule or create a new rule, and click **Done**.
- To remove a condition rule from a project page layout, click the name of the rule that is currently applied. In the Manage Conditional Rule dialog box, either select a different existing rule or create a new rule, and click **Done**.
- To delete an existing condition rule, navigate to the **Conditions** tab and click next to the rule in the list. Deleting the rule also clears its associations to any project page layouts or other components and thus shows the project page when viewed within a project.
- To edit an existing condition rule, navigate to the **Conditions** tab. Click to display the rule details, make the necessary changes, and click **Done**.
- Condition rules cannot be applied to a project page layout that is selected as the landing page for projects based on the process model.

  It is best practice to not edit condition rules once they are assigned. If a rule is no longer in use or valuable, delete the rule. Understand that any changes to a rule definition after it is assigned will trigger recalculations across projects and show/hide information accordingly.

- Condition rules cannot be applied to a project page layout that is selected as the landing page for projects based on the process model.

Assigning Roles to Project Pages

Within a project, you may want to restrict visibility to a project page based on a user's assigned Accolade roles. For example, you may have a layout that displays information that is pertinent to Executives or Gatekeepers who are making decisions about the course of a project, but that information should not be displayed for other team members.

You may also need specific project team members to be able to edit metric and matrix data in layouts based on their assigned Accolade roles. For example, you may have a layout that requires Executives to add comments about a project, or you may have a layout that requires Financial Specialists to edit values in a dedicated layout.

Process Designers can apply roles requirements at the process model level to any custom project page layout.

To allow roles to view a project page layout:

1. From the **Process** menu, select **Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Pages & Layouts** section.

   The current list of available project page layouts is displayed.
3. Locate the project page layout you wish to assign roles to. Click on the corresponding **Can View** column.
4. In the dialog box, select the roles the project page layout must be available to when viewed within a project based on this process model.
5. Click **Done**.

   The selected roles will display in the **Can View** column for the selected project page layout.
6. Click **Apply** to save your changes.

To allow roles to edit data in a project page layout:

1. From the **Process** menu, select **Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Pages & Layouts** section.

   The current list of available project page layouts is displayed.
3. Locate the project page layout you wish to assign roles to. Click on the corresponding **Can Edit** column.

   All roles assigned rights to view the project page layout will appear in the dialog box (except the Read Only role, which does not have the ability to edit and is not listed). If a role is not assigned to the **Can View** column, it will not appear here.
4. In the dialog box, select the roles of the project team members that require the ability to edit data in the project page layout when viewed within a project based on this process model.

   In addition to the selected roles, by default, if a layout can be viewed by the Project Manager of the project, Process Managers with Manage Process rights on the project, and Project Team Members with Extended Edit Rights on the project, the layout can also be edited by them.
5. Click **Done**.

   The selected roles will display in the **Can Edit** column for the selected project page layout.
6. Click **Apply** to save your changes.

Notes:

- To edit an existing role assignment, click on the displayed list of roles and make changes as necessary. To make the project page layout visible or editable for all users, select all roles in the appropriate list.

- All roles can view a project page layout that is selected as the landing page for projects based on the process model.

Exercises - Creating Models

Try out what you have learned!

- Create a model using the gated class you created in the previous set of exercises.
- Add two stage/gate pairs to the model.
- Add a deliverable with an activity to the first stage.
- Add a gate document to the last stage.
- Create a model using the non-gated class you created in the previous set of exercises. Notice that it is created with a single stage.

Automating Projects Using Metrics in Process Models

Process Designers can configure a process model to automate portions of a project using metrics. These automation settings apply to any projects created using the model in which they are set, regardless of how the project is created.

Access Group Assignment

To automate a project's access group assignment, Process Designers can select to assign a metric in the process model that determines the access group assignment based on the metric's value. The metric that determines the access group selection can be a string, long string, or list type metric.

For example, you may have projects that require tighter security restrictions at their conception stage. As the project is worked and additional staff is required to complete work, such as engineering and marketing staff, the project security requirements may change and may not be as restrictive. Or, you may define security restrictions around monetary value of project.

For these types of projects, create a calculated metric that sets the access group name, such as the following:

- If({*MD:ProjectCurrentStageName*} = 'Market Launch', 'Public', 'Confidential')

  This metric sets the access group to Public if the current stage is named Market Launch. If the project is any other stage, the access group is set to Confidential.

- If({*METRIC:NPV*}>= 10000, 'Market Release', 'Restricted Access')

  This metric sets the access group to Market Release if the value of the NPV metric is greater than or equal to 10000. If less than 10000, the access group is set to Restricted Access.

If a metric is used at the model level to set the access group assignment, the access group is set to read only within the project and updates as the metric recalculates.

To assign the access group using a metric in the model:

1. Create a gated or non-gated model, or an idea model.
2. Ensure the metric is associated to the model.
3. In the **Access Group Metric** field, select the metric that determines the access group assignment.
4. Click **Apply** to save your changes.

Project ID

To automate the assignment of a project's ID, Process Designers can select to assign a metric in the process model that determines the ID of the project. The metric that determines the project ID is typically a calculated metric, but can be a standard metric.

Note: If the **Auto-Generate Project IDs** system parameter is enabled, Accolade generates a numeric, sequential project ID for each project. If the parameter is enabled, the option to use a metric at the process model level is not available.

For example, your company may have standards for project IDs that require the same components for similar projects. In addition, setting a project ID to a metric value can automate updating a project ID as it moves through levels of required confidentiality or moves to a different business unit within the company.

For example, create a calculated metric called **AutoProjectID** that contains the following expression:

```
Concatenate({*METRIC:BU*},'-', {*METRIC:Year*},'-', {*MD:Brand*})
```

This metric creates a project ID that contains the assigned Business Unit, Brand, and user entered project name. For example, Snacks-2017-OnTheGo.

Note: If the metric's calculation returns no value, the project ID is set to the system project ID.

To assign a metric to define the project ID:

1. Create a gated or non-gated model, or an idea model.
2. Ensure the metric is associated to the model.
3. In the **Project ID Metric** field, select the metric that determines the project ID.
4. Click **Apply** to save your changes.

Project Name

To automate the assignment of a project's name, Process Designers can select to assign a metric in the process model that determines the name of the project. The metric that determines the project name is typically a calculated metric resulting in a string value.

For example, your company may have standards for project names that require the same components for similar projects. In addition, setting a project name to a metric value can automate the update of a project name as it moves through levels of required confidentiality or moves to a different business unit within the company.

For example, create a calculated metric called **AutoProjectName** that contains the following expression:

```
Concatenate({*METRIC:BU*},'-', {*METRIC:Brand*},'-', {*MD:ProjectID*})
```

This metric creates a project name that contains the assigned Business Unit, Brand, and user entered project ID. For example, Snacks-On the Go-15978.

Note: If the metric's calculation returns no value, the project name is set to the class name.

To assign a metric to define the project name:

1. Create a gated or non-gated model, or an idea model.
2. Ensure the metric is associated to the model.
3. In the **Project Name Metric** field, select the metric that determines the project name.
4. Click **Apply** to save your changes.

Default Project Manager

Process Designers can select to assign a specific Accolade user that is assigned as the project manager when a project that uses the model is created, or can select to assign a user based on either a string or number metric value. Using a metric enables automatic routing of ideas, concepts, and projects to the correct business leader based on criteria for the project such as business area, product line, or geographic location.

> Ensure the metric selections assigned to the model are editable on project creation, and that the metric that selects the Project Manager is set to **Not Show** within the project.

For example, your company uses one process model to manage their global projects.

To automatically route newly created projects to different managers based on a geographic selection, set up two metrics:

- A cascading list that is available at project selection to select the country, state or province, and the city when creating a project or submitting an idea.
- A calculated metric using one of the following methods that defines the user who is set as the manager for each city:
  - Using a number metric:

    The following calculated metric sets the default project manager to the user whose ID is **3** if **Paris** is selected as the city when the project is created, and to the user whose ID is the original creator of the project if **Paris** is not selected.

    ```
    if({*METRIC:city*}='Paris', 3, ProjectCreatedByID())
    ```

    > Run a report including the **User Name** and the **System User ID** columns to determine a user's ID within Accolade.

  - Using a string metric:

    The following calculated metric sets the default project manager to the user whose Login Name is *'domain\admin user'* if **Paris** is selected as the city when the project is created, and to the user whose User Name matches the Login Name if **Paris** is not selected.

    ```
    if({*METRIC:city*}='Paris', 'domain\admin user', ('domain\\' +
    ProjectCreatedByName()))
    ```

Note: Process Managers with Manage Team rights can assign a different manager at the project-level after a project is created.

To assign the default project manager using a metric in the model:

1. Create a gated or non-gated model, or an idea model.
2. Ensure the metric is associated to the model.
3. In the **Default Project Manager** field, select the calculated metric.

   Only metrics associated to the model are available for selection.

4. Click **Apply** to save your changes.

Gate Dates

To automate the assignment of a gate's date, Process Designers can select a date metric that sets the gate's date and therefore the meeting date. Any date metric can be selected to set the date. In addition, Process Designers can define a gate in a model to include a metric that defines the min and/or max date to restrict the gate date to on or before, on or after, or between a set of dates when the date is set through the process graphic in a project, the Gates page, or through the Project Gantt.

Gate dates can also be set using automated workflow steps to set the gate date when a workflow is completed.

To use a Date metric to set a gate date:

1. Create a gated model.
2. Ensure the metric is associated to the model.
3. Select the gate within the model that you want to modify.
4. In the **Set Gate Date** field, select the date metric to use to set the gate date.
5. In the **Min Gate Date Metric** and the **Max Gate Date Metric** fields, select the metric that sets the minimum and maximum dates that this gate can be set to through the process graphic in a project, the Gates page, or through the Project Gantt.

   You can select a metric in either field, or in both fields to create an allowed date range.

   The minimum and maximum settings do not apply to dates set through workflow automation, or if a metric is configured to set a gate date.
6. Click **Apply** to save your changes.

Gate Decisions

To automate gate decisions for each gate, Process Designers can define a set of conditions that must be met within a project to set each gate decision type. Automating gate decisions removes the need to manually enter the gate decision, or to configure gatekeeper voting. Accolade processes the decisions in the following order and sets the decision to the first one that matches the metrics assigned:

- Go
- Kill
- Hold
- Recycle
- Pending Decision

A Conditional Go decision cannot be set using an automated gate decision and event reasons are not captured for automated gate decisions.

Note: Workflows can also be configured to automatically set a gate decision using an automated step. Sopheon recommends using the **Automated Gate Decision Rules**

settings within the process model or workflow automated steps to automate gate decisions, but not both.

Use this setting in conjunction with a metric that restricts Go decisions, as described in the section below.

To define conditions to set gate decisions:

1. Create a gated model.
2. Ensure the metric is associated to the model.
3. Select the gate within the model that you want to modify.
4. In the **Automated Gate Decision Rules** field, for each gate decision listed, click the gate decision link and complete steps 5 to 7.
5. Click , select a metric to include as a condition, and click **Select**.

   Use the **Category** and **Search** options to refine the list of metrics.
6. For the added metric, select or enter the value the metric must meet within the project for the gate decision to be made.

   If the project's metric setting does not meet this value, or the project does not include the metric, the gate decision is not set.
7. Repeat step 5 to add additional conditions that must be met for the decision.

   If multiple conditions are entered, all conditions must be met for the decision to be set.

   To edit a condition, click to delete it and repeat step 5.
8. Click **Apply** to save your changes.

Restricted Go and Conditional Go Gate Decisions

In addition to automating a gate decision, Process Designers can also define a set of conditions that must be met within a project for the Go or Conditional Go decision to be set. Setting a restriction here can help to ensure that certain deliverables, activities, and metrics are complete within a project or a set of portfolio projects before making a Go or Conditional Go decision that advances the project to the next stage. Restrictions only apply to Go or Conditional Go gate decisions.

Create the following metrics:

- One or more metrics to use as conditions in the model definition for the gate. When the metric calculates to match the defined condition value, the gate is set and the project moves to the next stage.

  For example, if you have a parent project that is a container for a series of child projects, you can set a calculated metric as a condition that requires metric values in the child projects be set before the project can advance to the next stage.
- A String or Long String metric that explains the conditions required to set a Go or Conditional Go decision that displays when a gate owner sets the gate decision to Go or Conditional Go.

To restrict Go and Conditional Go gate decisions:

1. Create a gated model.
2. Ensure the metric is associated to the model.
3. Select the gate within the model that you want to modify.
4. In the **Required Conditions for Go Decisions** field, click **Conditions**.
5. Click , select a metric to include as a condition, and click **Select**.

   Use the **Category** and **Search** options to refine the list of metrics.
6. For the added metric, select or enter the value the metric must meet within the project for the for the gate decision to be made.

   If the project's metric setting does not meet this value, or the project does not include the metric, the gate decision is not set.
7. Click **Apply** to save your changes.

Other Process Model Configuration Options

Now that you have created a process model and understand its basic components, you can start adding additional Accolade components to it, such as report, metrics, and matrices. You can also configure the graphic, and define what displays on certain pages in projects that use the model. In addition, you can take steps to automating portions of a model including how gate dates and project managers are assigned.

Associating Charts and Reports to Process Models

Charts and reports can be displayed within a project, allowing users to easily access pertinent information to summarize a single project's status or to compare projects across a portfolio. Charts and reports can be associated with one or more gated, non-gated, or idea process models, and Administrators or Process Designers can create the association by adding a layout to the process model in order to display within projects based on that model.

Charts and reports can be displayed in a project by two different methods:

- Reports displayed on the project's Reports layout - Excel or HTML reports can be directly associated with the process model's layout and accessed on the project's Report layout on the report list pod. This method of displaying a report allows users to click on the report's name to open it for viewing or downloaded, depending on the report's configuration.

  Note: HTML and Excel reports set as **Active in Projects** are available for association with a report list pod to display.

- Charts and/or reports added to a project page layout - HTML reports, online reports, and charts created from online report data can be added to a page layout, and these page layouts can be associated with the process model and added to display as a custom page in the project's page

list. This method of displaying a report allows users to view multiple data sources at one time, and to apply runtime filters in order to filter the project information displayed in the charts and/or reports.

To associate a report to a model:

1. From the **System** menu, select **Page Design** > **Layouts**, create or edit a layout to contain the Report List.
2. For the new or edited pod, use the **Type** drop-down menu to select **Project Information** and in the **Content** drop-down list select **Report List**.
3. Click **Advance Settings** to configure the reports to display on the Report List pod.
4. In the **Category** field, select the category to narrow the list of available reports to only the reports in that category. This field only displays if reports in multiple categories are available.
5. For each selection, highlight the report name in the Available window, and click **Select**, or double-click the report name to move it from the **Available** list to the **Selected** list.

   Important! The reports that display for selection are based on your access group permissions as defined in your user profile. Only elements that the user has "Can Edit" access for are available for selection. Additionally, access group settings for the report must match the user permissions of other Accolade users in order to display for them.

   ---

6. Click **Apply** on the pod advance settings configuration and save the layout.
7. From the **System** menu, select **Process > All Models** and select the model to edit.
8. Click the **Pages** tab and add the new layout to the list of pages on the model.
9. Click **Apply** to save your changes.

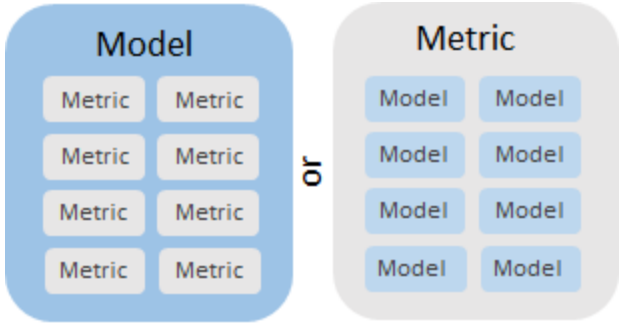
Note: Accolade Online reports are not available to associate to the model using this procedure. To add an Accolade online report as a project-level report, add a Report pod to a layout and associate the page layout to the process model.

Notes:

- Reports associated to process models in a project page layout only display project specific details. For example, if you create a report containing various project details for every project in the system and associate this report to a model, the report only displays the given project details when viewed on a project page.

Associating Metrics to Process Models

To ensure that metrics are available within projects, associate the metrics to the process model. Create an association from the metric to the model, or from the model to the metric. The procedure to complete the association is similar and has the same result. How you choose to make the association may depend on whether you want to assign multiple metrics to a model at once, or a single model to multiple metrics.



If the metric is part of a matrix, a page layout, or a quick grid (including quick grids contained in a page layout associated with the model), you do not have to associate the metric with a model. If the metric is inactive, it is set to active on association.

> Click **Download** on the Metrics page (**System > Content Sources > Metrics**) to download all the metrics in the table to a spreadsheet. The spreadsheet includes additional information, such as the process models to which each metric is associated, list values for list metrics, and availability settings, allowing a single place to review the current metrics defined throughout the system.

To assign multiple metrics to a single model (Process Designers only):

1. From the **System** menu, select **Process > All Models**, and select the model to edit.
2. Click the **Metrics** tab to display the metrics associated with the model.

   > If you are creating a new process model, the **Metrics** tab is not available until you complete creating the model and click **Create**.

3. Click **Add** to open the Select Metric(s) dialog.

   Use the category, name and system name fields to filter the list of metrics.
4. For each selection, highlight the metric name in the Available Metrics window, and click **Select**, or double-click the metric name to move it from the **Available** list to the **Selected** list.

   Only active metrics are available to add.
5. To define how the selected metrics display for certain actions, select **View** or **Edit** for each of the project locations listed.

Locations with no selections do not contain the metric. You can change these settings for individual metrics after adding them to the model. Metrics without display settings are still available to deliverables, reports, and quick grids.

Calculated metrics can only be set to **Show** on project pages. Rich text metrics cannot display on any other project pages.

6. Click **Done** and make any adjustments to the presentation settings for the associated metrics.
7. *(Optional)* If your company uses Accolade planning and roadmapping features, and the metric is available to Innovation Planning:
   - Select the star in the **Planning Favorite** check box to display the metric on the front of planning elements types that correspond to the model's class. The class to which the process model belongs must also be available to Innovation Planning.
   - If the metric is a date metric, select the check box in the **Milestone** column to designate the metric as a milestone in Innovation Planning. To show relationships between milestones the start and end milestone metrics must first be set as visible in Roadmapping. To set milestone metrics as visible open the data type from the element type menu on the left and click on the diamond next to the relevant metric.
8. *(Optional)* To make a metric required for projects created using the model, select the check box in the **Required** column.

   Metrics cannot be marked as required for idea models.

   If a metric is set as required on project creation, ensure that Process Managers are granted visibility to the metric. Without visibility, the Process Manager is unable to create projects using features that contain the required metric.

   If a metric is set to required, it will be required anywhere it displays in the system as editable. For example, if the metric displays in a data form pod on a project page layout and it is editable, it will be required for users to complete when making changes to the page.
9. Click **Apply** to save your changes.

To assign a single metric to multiple models:

1. From the **System** menu, select **Content Sources > Metrics** and select the metric to edit.
2. Click  in the **Models** section.
3. In the Select Model dialog, enter one or more search criteria to filter by name, or by selecting one or more of the following options:
   - Selecting one or more classes in the **Classes** drop-down will display available models that are assigned to the class.

     Select **Check All** to see all available models.
   - Check the **Show Inactive Classes** and/or **Show Inactive Models** to further define the models that display.
4. For each selection, highlight the model name in the Available Models window, and click **Select**, or double-click the model name to move it from the **Available** list to the **Selected** list.

5. Click **Done** to add the selected models to the metric.
6. For each model, select **Show** to display the metric as view only, or **Edit** to display an editable version of the metric for the Accolade locations listed.

   Locations with no selections do not contain the metric. You can change these settings for individual metrics after adding them to the model. Metrics without display settings are still available to deliverables, reports, and quick grids.

   Calculated metrics can only be set to **Show** on project pages. Rich text metrics cannot display on any other project pages.
7. *(Optional)* If your company uses Accolade Innovation Planning and Roadmapping features, and the metric is available to Innovation Planning:
   - Select the check box in the **Planning Favorite** column to display the metric on the front of planning element types that correspond to the model's class. The class to which the process model belongs must also be available to Innovation Planning.
   - If the metric is a date metric, select the check box in the **Milestone** column to designate the metric as a milestone in Innovation Planning.
8. *(Optional)* To make a metric required for projects created using the model, select the check box in the **Required** column.
   - Metrics cannot be marked as required for idea models.
   - Metrics set to show on project creation cannot be marked as required.
   - If a metric is set as required on project creation, ensure that Process Managers are granted visibility to the metric. Without visibility, the Process Manager is unable to create projects using features that contain the required metric.
   - If a metric is set to required, it will be required anywhere it displays in the system as editable. For example, if the metric displays in a data form pod on a project page layout and it is editable, it will be required for users to complete when making changes to the page.
9. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.

Notes:

- To remove an association between a metric and a model, open the model and select the **Metrics** tab. Click  in the **Remove** column next to the association to delete and click **Apply**. To remove all metrics from a model, click **Remove All**.
- For the parent project in a portfolio, select **Edit** in the **Portfolio** column of the number metric that rolls up on the project's **Portfolio** page so that the target value is editable.

  The parent project is the project that has the **Contains** link to the projects in its portfolio. For the child projects, the metric rolls up regardless of where it is editable in the project. Metrics cannot roll up except to the parent project. That is, a metric that is in a grandchild, child, and parent project rolls up from the grandchild to the child (and from the child to the parent) but the roll-up value from the grandchild does not continue to be rolled up to the parent.

- Metrics created in Innovation Planning are added to their model without any presentation settings. You must specify their presentation settings before the metrics are available for use in projects.
- Marking a metric as required on a project's creation page has no effect on a model used for creating Innovation Planning projects. The projects are created automatically without requiring any user to enter the metric value. However, the metric value must be entered if the model is used as the target in a migration.

Associating Matrices to Process Models

To ensure that matrices and their metrics are available within projects, associate the matrices you create to the process model. You can create an association from the matrix to the model, or from the model to the matrix. How you choose to make the association may depend on whether you want to assign multiple matrices to a model at one, or a single model to multiple metrics.

> When you associate a matrix with a model the metrics within the matrix are automatically associated with the model, although they are not listed when configuring metrics for the model. The same is true if the matrix is part of a quick grid that is added to the model on a deliverable, activity, or that is included in a page layout associated with the model.

To assign multiple matrices to a single model (Process Designers only):

1. From the **System** menu, select **Process > All Models**, and select the model to edit.
2. Click the **Matrices** tab to display the matrices associated with the model.

   > If you are creating a new process model, the **Matrices** tab is not available until you complete creating the model and click **Create**.

3. For each selection, highlight the matrix name in the Available window, and click the arrow, or double-click the matrix name to move it from the **Available** list to the **Selected** list.
4. Click **Apply** to save your changes.

To assign a single matrix to multiple models:

1. From the **System** menu, select **Content Sources > Matrices** and select the matrix to edit.
2. Click the **Models** tab to display the models to which the matrix is associated.

   > If you are creating a new matrix, the **Models**tab is not available until you complete creating the matrix and click **Create**.

3. For each selection, highlight the model name in the Available Models window, and click the arrow, or double-click the matrix name to move it from the **Available** list to the **Selected** list.

4. In the Select Model dialog, highlight the layout name in the Available window, and click the arrow, or double-click the matrix name to move it from the **Available** list to the **Selected** list.
5. Click **Apply** to save your changes.

Notes:

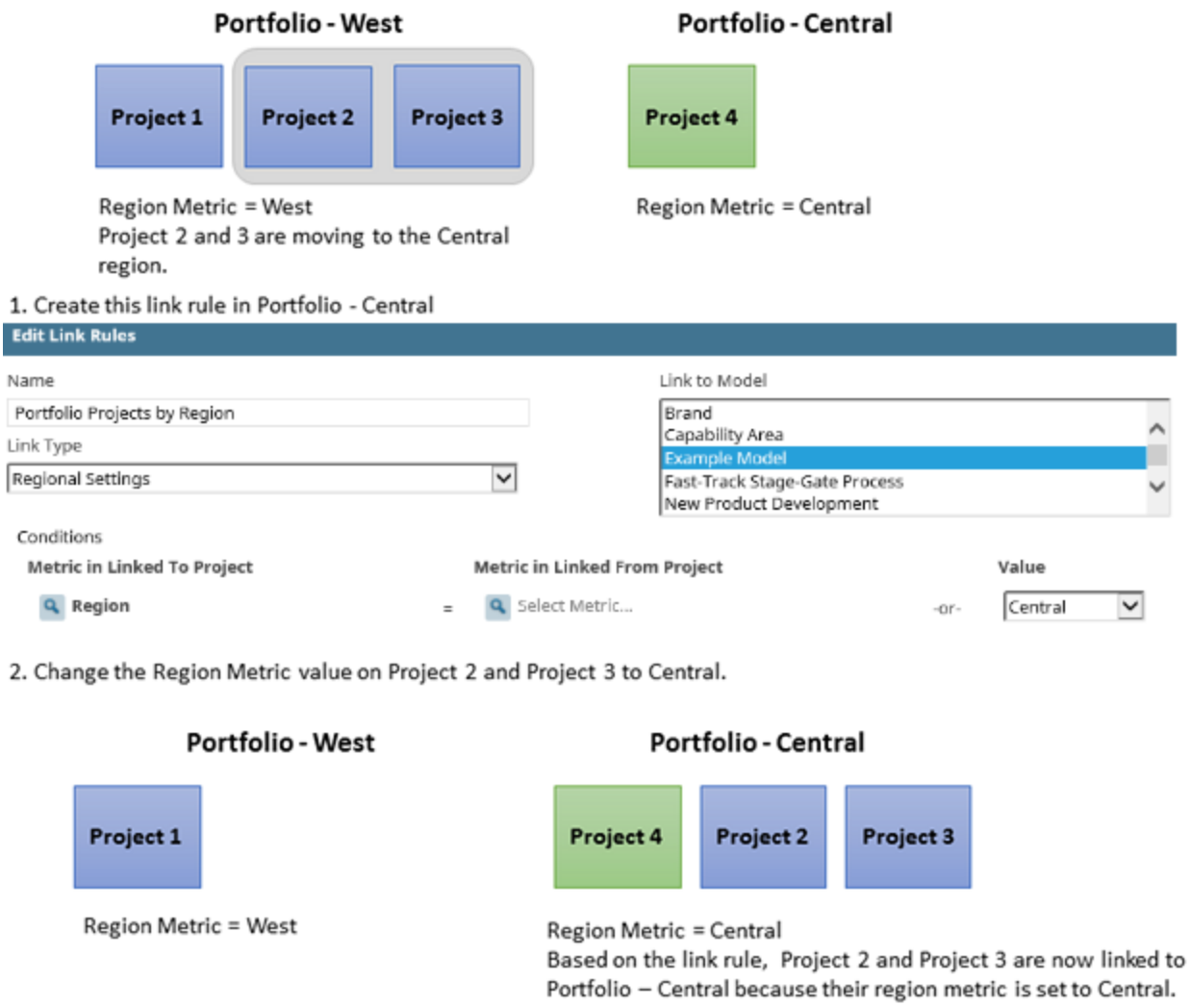
- To remove an association between a matrix and a model, open the model and select the **Matrices** tab. In the **Selected** list, move the matrices you want to remove to the **Available** list and click **Apply**. Removing a matrix from a model disables the matrix in both and open and closed projects.

Adding Project Links in Process Models

Related projects are those that are connected to the current project by some kind of relationship. Link projects that are related, such as, projects that must start and end at the same time, or projects that must finish before a second project can begin. Projects may also represent a component or sub-project of a larger project. Project links do not enforce the dependency relationship. They simply show how a project is related to other projects.

For larger programs, it can be more efficient to create a rule based on a metric selection that establishes the link between the main project and the sub-projects that contain that metric setting. For example, if a program or project changes to a different business unit or is classified into a different product area, using a link rule allows you to update all the links at once by changing only the rule definition, and not opening each project to reset the project link.

See the following page for an example of project link setup.



Process Designers can set automatic link rules at the model level that are applied to all projects that use that model.

To automatically create a link between projects at the model level:

> **Note:** Prior to creating a link rule, determine the metric names and values to use to create the conditions that automatically connect the projects.

1. Display the model and click **Project Link Rules**.
2. In the **Name** field, enter a name to identify the link rule.
3. In the **System Name** field, enter a unique system name to identify the rule across the system and in process model download/upload.
4. In the **Link Type** field, select the link type to use within the rule.

   The link types available are based on the models defined in the link type's **Link Type Rules** selections.

5. In the **Link to Model** field, select one or more models that projects must use to be automatically linked using this rule.

   The models available are those included in the models defined in the link type's **Link Type Rules** selections.

6. In the **Conditions** section, click  under **Metric in Linked To Project** to select one metric within the source project. Choose the metric category and search for the appropriate metric.
7. Click **Select** to add the metric.
8. Do one of the following to select a metric or value for the target project:

   - Click  under **Metric in Linked From Project** to select one metric within the target project. Choose the metric category and search for the appropriate metric. Click **Select** to add the metric.
   - Enter an appropriate value for the target project.

     The target project's metric must equal the value or metric in the source project to create the project link.

     Only metrics associated to the selected model are available; however, metrics created using the LinkedProjectValues formula are not available for selection, even if they are associated with the model.

     If you define multiple conditions in a rule, projects must match all conditions to create the project link. If a metric that is part of the link rule is deleted from Accolade, project links are created based on the remaining portions of the rule definition. The existing links based on the deleted metric are not deleted.

9. *(Optional)* To add multiple link rules, click **Add New** and repeat steps 2-8.

   If you add multiple rules, a project must only match one rule in the list to create the project link.

10. Click **Save**.

    Accolade searches for projects that meet the rule conditions and creates the related project link. Depending on the number of projects, It can take a moment for all related projects to display in the list.

Notes:

- If you copy of a process model, the link rules in the source model are not copied to the new model.
- If a link type is configured with a **Max Project Links** value, you cannot create more than the number of links set for the link type. Existing links are not automatically removed when the value is set; therefore, if project links existed prior to the max value being set, it is possible that more links exist than the maximum allowed. In this case, you must manually remove links between projects to respect the max value before creating any additional links.
- If a link type, a model, or the final metric assigned to a rule are deleted from Accolade, the link rule becomes invalid. The existing links created prior to the deletions are not deleted.

Exercises - Associating Reports, Metrics, and Matrices

Try out what you have learned!

- Open the gated model you created in previous exercises.
- Associate one or more reports (if one exists in your configuration) to the model.
- Associate a metric and make it editable and required at project creation.
- Associate a matrix (if one exists in your configuration) to the model. Return to the Metrics tab and notice that the metrics within the matrix are automatically associated to the model.

Assigning How Select Metadata Displays in Projects

Using the metadata display options when defining a model, Process Designers can do the following:

- Change the field labels for start and end dates in projects that use the model, set where start and end dates display, and set whether they are editable in each location.
- Change the field labels for up to ten fields that contain extended strings for project data in projects that use the model, set where the fields display, and set whether they are editable in each location.
- Specify where project currency displays, and whether it is editable in each location.

Start and End Dates

If you have projects that use different terms for start and end dates, define the start and end date metadata to have a different display name, such as Launch Date instead of End Date. In addition, Process Designers can set where start and end dates display and whether they are editable in each location.

To assign how start and end dates display in a project:

1. From the **System** menu, select **Process > All Models**, and select the model to edit.
2. Select the **Metadata** tab to display the metadata display information for the model.

   If you are creating a new process model, the **Metadata** tab is not available until you complete creating the model and click **Create**.

3. In the **Display Name** field, update the display names as necessary.

   The text entered in this field displays throughout Accolade in replace of the terms **Start Date** and **End Date**.

4. In the **Creation** field, select whether the project start and end dates are hidden, required, or editable when a project that uses this model is created.

   The **Start Date** and **End Date** fields on the details page of planning elements in Accolade Innovation Planning are always available for editing.

5. In the remaining fields, select whether the start and end dates are hidden, read-only, or editable in each of the locations listed.

   The Project Graphic displays across the top of a project page and indicates the current stage.

6. Click **Apply** to save your changes.

Extended Project Data

If you have projects that require an area to provide an extended amount of data that exceed the limitations of Long String metrics, Process Designers can add one or more Extended Project Data fields available in the process model to display in the project. In addition, Process Designers can set where start and end dates display and whether they are editable in each location.

To assign how Extended Project Data fields display in a project:

1. From the **System** menu, select **Process > All Models**, and select the model to edit.
2. Select the **Metadata** tab to display the metadata display information for the model.

   If you are creating a new process model, the **Metadata** tab is not available until you complete creating the model and click **Create**.

3. In the **Display Name** field, update the display name for each **Extended Project Data** field you want to use to reflect the type of information that will be entered into the field in a project.
4. In the **Creation** field select whether the **Extended Project Data** field is hidden or editable when a project that uses this model is created.
5. In the **Planning** field (if you run Innovation Planning), select whether the **Extended Project Data** field is hidden or editable within a planning element's details.
6. In the remaining fields, select whether the **Extended Project Data** fields are hidden, read-only, or editable in each of the locations listed.
7. Click **Apply** to save your changes.

Project Currency

Your company may have multiple offices and projects within your company that track costs, estimates, and other financial information in the project's local currency. If your system uses a general currency and the **Corporate Currency** system parameter, Process Designers can also select whether a project currency is selected when a project is created and where the project currency displays and is editable within a project based on the model.

If Accolade is configured to use date-specific currency conversions using reference tables, the project currency setting within the process model does not apply.

To assign how project currency displays in a project:

1. From the **System** menu, select **Process > All Models**, and select the model to edit.
2. Select the **Metadata** tab to display the metadata display information for the model.

   If you are creating a new process model, the **Metadata** tab is not available until you complete creating the model and click **Create**.

3. In the **Creation** field in the **Currency** row, select whether the project currency is editable when a project that uses this model is created.
4. In the remaining fields, select whether the project currency is hidden, read-only, or editable in each of the locations listed.

   Currency does not apply to the **Project Graphic** or **Resource Editor** selections.

5. Click **Apply** to save your changes.

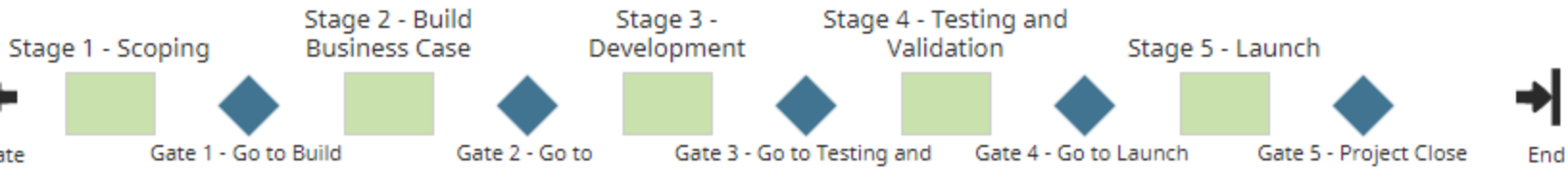
Defining the Process Model Graphic

Accolade allows you to configure the process model graphic to suit your individual business and project needs. Configure the model's colors and graphics associated with stages and gates to create a visual representation specific for your business and the process the model represents. Configured process model graphics display for all projects that use the model.

To select the process model graphic style:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Process Definition** tab and navigate to the **Appearance** section.
3. In the **Graphic Style** field, select one of the following process graphic styles:
   - **Compact** - Provides a version of the graphic that displays using less vertical space on the screen.

   - **Traditional** - Provides a more conventional Phase Gate diagram as used in past Accolade versions, including separated icons for gates and stages.



   The same information is available in both styles, and both styles offers the configuration options described below.

   The selected graphic style displays at the top of the page.

5. Click **Apply** to save your changes.

To configure the stage display properties:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Select the stage to edit in either the Model tree on the left or in the process graphic at the top of the page, and navigate to the **Appearance** section.
3. *(Optional)* To set an icon that displays in front of the stage name, click the icon selection box and select an icon.

   Narrow the list of available icons by selecting a category.

4. Click **Done** in the dialog to save your changes or **Clear** to discard the icon selection and revert back to the default of no icon.
5. *(Optional)* Select a color from the color picker.

   If known, you can enter an RGB, HSB or Hex numbers instead of picking a color. To select a specific color, enter the RGB, HSB or Hex number.

6. To apply your changes to all stages, select **Apply fill settings to all stages in this model**.
7. Click **Apply** to save your changes.

To configure the gate shape and colors:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Select the gate to edit in either the tree on the left or in the process graphic at the top of the page, and navigate to the Appearance section.
3. *(Optional)* Select the gate shape by clicking the shape and selecting from the available options.

   The default shape for gates is a diamond.

4. Click **Done** in the dialog to save your changes.
5. *(Optional)* Select a color from the color picker.

   If known, you can enter an RGB, HSB or Hex numbers instead of picking a color. To select a specific color, enter the RGB, HSB or Hex number.

6. To apply your changes to all stages, select **Apply fill settings to all gates in this model**.
7. Click **Apply** to save your changes.

To configure the gate decision badge (shape within the gate indicating its status):

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Select the gate to edit in either the Model tree on the left or in the process graphic at the top of the page, and navigate to the Appearance section.
3. Click the decision badge icon to select a new shape.
4. Select a new decision badge from the available list.
5. Click **Apply** to save your changes.

Defining Project Pages and Display Options

Process Designers can configure each process model to show or hide pages that display within projects based on that model. Pages that can be selected include system-driven pages like Discussions or Resources pages, as well as system-driven or custom project page layouts that have been created for use in the model.

To define the project page displays:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Pages & Layouts** section.

   The current list of available page layouts is displayed.
3. *(Optional)* If there are additional custom page layouts that are not included in the list, click and use the following options to add the additional layouts to the list.

   To narrow the layouts list, search by the layout name, system name, or category.

   For each selection, highlight the layout name in the Available Layouts window and click **Select**, or double-click the layout name to move it from the **Available** list to the **Selected** list.

   Click to remove an individual layout from the **Selected** list.

   Click **Clear** in the to remove all layouts from the list of available project pages.

   Click **Done** to exit the dialog.
4. Choose one or more of the following selections to define the project page display options:

Field	Description
Landing	Select the project page that opens initially when a user goes to a project based on this process model. The page you select as the landing page determines the entry project page for users even if that page is not selected to be visible. **Important!** Project page layouts that have role restrictions or condition rules applied cannot be selected as a landing page.
Visible	Select which pages are available for viewing in a project based on this process model. By default, active system layouts, such as **Project Home** and **Project Gates**, display at the top of the project navigation pane. All other custom project pages created using layouts and set as visible display below the system project pages in the project navigation pane based on the layout's assigned order. If you select only one project page or layout to be visible, the navigation pane does not display in the project. Once you select a second project page or layout to be visible, the navigation pane displays.

5. *(Optional)* In the Assigned Rule column, enter a condition rule to be applied to the layout.
6. *(Optional)* In the Can View column, define all roles that require the ability to view the layout.
7. *(Optional)* In the Can Edit column, define any roles that require the ability to edit the layout.
8. *(Optional)* Drag and drop the pages into new locations within the list to customize the order to display on the project page.
9. Click **Apply** to save your changes.

Defining the Team Page Display Options

In addition to selecting the pages that display within projects, Process Designers can define the following options for the Team page when displayed in projects:

- The information available in each section of the Team page.
- The default order in which the information displays within each section.
- Whether to limit user selection on the Team page based on the function assignment.

Consider configuring the Team page using these options if there are projects in your company that do not require team assignments, or whose assignments are set and then locked down to prevent changes, or to control what information is available within the Team page. For more information about the Team page and how it is used to establish a team within a project, see *Assigning Project Teams*.

To define the project Team page options:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Team Page and Management Options** section.
3. For each section of the Team page (project team, workflow action owners, and gatekeepers), do the following:
   - Select whether to display the section by clicking the related **Display** check box.
   - If the section is selected to display for each column listed, select whether the column is **Available** or **Unavailable**.

     Unavailable columns are not displayed and are not available for selection if a user chooses to filter the contents on the Team page.
   - Hover over the column name to display  to drag and drop the columns in each section to set the order displayed on the Team page.
4. Select the **Enforce function on user selection** check box to limit the selection of users to those who have the function defined on the assignment.

   This option is a global setting for all objects in the model and applies to selections on the Team page, owners of deliverables and activities, workflow action owner assignments, and gatekeeper selections.

    To set the enforcement for a single object in the model, for example for an individual deliverable, use the **Enforce function on user selection** option available for each object. This global setting overrides individual object settings.

   Selecting this option also disables the ability to change the function for any assignment and is enforced even if the function is inactive.
5. Click **Apply** to save your changes.

Notes:

- To remove a layout from the list of project pages, click  next to the project page listed and click **Apply**. System pages are not available for deletion from this page.
- The active system layout **Project Home** is the default page for users to view and update project history, team and details. Additionally, the active system layout **Project Gates** is the default page for users to view gate details and information, and record gate decisions. Customize the default project page layouts to fit your organization's needs.

Exercises - Configuring the Process Graphic and Team Page Displays

Try out what you have learned!

- Open the gated model that you created in earlier exercises.
- Set the current stage to display green and pick a custom icon.
- Change the shape of a gate.
- Configure the team page to not display the gatekeepers section.

Defining Process Model Security

Process Designers can configure each process model to respect security settings. These security settings propagate to the projects based on the model. However, you can configure other security settings for individual projects, deliverables, and users via access groups, individual project security, and conditions.

To define the security in a process model:

1. From the **System** menu, select **Process > All Models**, and select the model to edit.
2. Click the **Security** tab to display the configuration options.
3. Define the security with the following settings:

Field	Description
Enforce project security	Select this check box to ensure that only users with security access defined through access groups, security lists, or security profiles can be added to a project. This applies to all user types that can be added to a project. **Important!** If you enable this option, existing projects using this model that contain users assigned outside their security access *are not* automatically removed from the project. Project Managers, Process Managers and (Deprecated) Idea Managers with Manage Process rights can override this setting as necessary at the project level after a project is created. Enforcing project security at the project level automatically removes users from the project.
Access Group Metric	To automate a project's access group assignment, select a metric that updates the access group based on the metric's value. Selecting a metric to set the access group updates the security granted to a project when the project meets a certain condition, such as a specific stage of development. Ensure that the selected metric's formula does not include the access group, or a metric that includes the access. If a metric is used to assign the access group, the access group cannot be manually updated in the project.
Default Project Access Group	Select the default access group to assign to a project at project creation. Process Managers can update the selection as necessary when creating projects. If you are also using restricted access groups, ensure the default group you select is also part of the restricted list.

Field	Description
Restrict Projects To These Access Groups	To restrict which access groups projects that use the model can exist in, select one or more access groups from the list. If no restrictions are selected, projects that use this model can be created or moved to any access group a Process Manager or (Deprecated) Idea Manager has access to select. Setting restrictions at the model level helps to ensure that portfolios and other projects are created in the correct access group location.
Configuration Access Groups	Select the access group(s) to which the process model belongs. The access group(s) displayed are based on the current user's access group permissions, and the process model defaults to the highest level access group listed. Note that the process model is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

4. Click **Apply** to save your changes.

Notes:

- Access groups must be empty in order to delete them. Move the process model, deliverables, and activities to a different access group. System administrators are the only users who can delete access groups.

Restricting Configuration via Access Groups Overview

Use access groups to restrict reporting and configuration components within Accolade. Defining who can view and edit components in the system allows your company to establish corporate guardrails and mitigate risk of Process Designers accidentally making changes to items outside of their business group or division. Establishing an access group hierarchy and restricting edit rights within that hierarchy allows for configuration flexibility while still ensuring corporate standards for configuration are met.

A Process Designer might be able to view a corporate-level process model but not be able to edit it. They would, however, be able to edit components within the process model such as deliverables specific to their business unit or division. By segmenting configuration and restricting configuration edit permissions, you can ensure business units across your company follow corporate guidelines such as processes for process models while still granting autonomy at the lower division levels. When designing access group hierarchies, consider the corporate use of configuration and the local autonomy of employees that need to view and/or edit items within their business unit or division.

For example, Process Designer Sandy has access group view and edit permissions at the corporate level. She can view and edit configuration for the all the business groups and divisions in the organizational hierarchy. She might set corporate standards that apply across the organization.

Process Designer Jeff can only edit requirements for his business group and the divisions below. However, he has view access group permissions for the Electronics business group and corporate configurations so he can view configurations and collaborate across the organization.

Restricting configuration components is driven by the access group assignment of the configuration component ***and*** the access group assignment of the user. When assigning users to access groups, assign them additional view and edit permissions within the access group.

Configuration components that respect access group restrictions include all levels of process model and reporting setup, to include classes, process models, gate documents, layouts, deliverables and activities, metrics, matrices, templates, quick grids, workflows, functional areas and functions, online charts and reports, and Accolade Office Extensions reports.

Restricting Configuration for Classes

Restrict who can view and edit classes by assigning the class to one or more access groups. Process Designers with matching access group permissions set in their user profile will be able to view or edit the class.

> **Note:** The access groups that display for selection are based on your access group permissions as defined in your user profile. Additionally, access group settings for the class must match the user permissions of other Process Designers in order to display for them.

To restrict class configuration:

1. From the **System** menu, select **Process > Classes**.

   To narrow the class list, search by the class name, system name, or category.

2. Either select the class to edit.
3. Click the **Security** tab to display the configuration access group settings.
4. Select the access group(s) to which this class belongs.

   The access group(s) displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. However, parent access group information is visible for access groups to which you have View permission.

   The class is selected to the highest level access group listed by default. Note that the class is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

   Process Designers with matching access group permissions will be able to navigate to and edit the class, depending on their individual access group permissions.
5. Click **Apply** to save your changes.

Restricting Configuration for Process Models

Restrict who can view and edit process models by assigning the process model to one or more access groups. Process Designers with matching access group permissions set in their user profile will be able to view or edit process model components.

Note: The access groups that display for selection are based on your access group permissions as defined in your user profile and the access groups assigned to the class the model is being attached to. Additionally, access group settings on the process model must match the user permissions of other Process Designers in order to display for them.

To restrict process model configuration:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Security** tab to display the configuration access group settings.
3. Select the access group(s) to which this process model belongs.

   The access group(s) displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. However, parent access group information is visible for access groups to which you have View permission.

   The process model is selected to the highest level access group listed by default. Note that the process model is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

   Process Designers with matching access group permissions will be able to navigate to and edit the process model, depending on their individual access group permissions.
4. Click **Apply** to save your changes.

Restricting Configuration for Deliverables and Activities

Restrict who can view and edit deliverables and activities by assigning the deliverable or activity to one or more access groups. Process Designers with matching access group permissions set in their user

profile will be able to view or edit the deliverable or activity.

Note: The access groups that display for selection are based on your access group permissions as defined in your user profile. Additionally, access group settings for the deliverable or activity must match the user permissions of other Process Designers in order to display for them.

Deliverables and activities inherit the access group visibility assigned for the model. All deliverables and activities on the model display regardless of their individual access group assignments.

To restrict deliverable and activity configuration:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
   - **To add a new deliverable** - In the Model tree, click  next to the stage to add the deliverable to.
   - **To add a new activity** - In the Model tree, click  next to the deliverable to which the activity applies.
   - **To edit an existing deliverable or activity** - Expand the stage or deliverable within the Model tree and select the deliverable or activity.
3. Select the access group(s) to which the deliverable or activity belongs.

   The access groups displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. Parent access group information is visible for access groups to which you have View permission.

   The deliverable/activity is selected to the highest level access group listed by default. Note that the deliverable/activity is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

   Process Designers with matching access group permissions will be able to navigate to and edit the deliverable and activity, depending on their individual access group permissions.
4. Click **Apply** to save your changes.

Restricting Configuration for Gate Documents

Restrict who can view and edit gate documents by assigning the gate document to one or more access groups. Process Designers with matching access group permissions set in their user profile will be able to view or edit the gate document.

Note: The access groups that display for selection are based on your access group permissions as defined in your user profile. Additionally, access group settings for the gate document must match the user permissions of other Process Designers in order to display for them.

Gate documents inherit the access group visibility assigned for the model. All deliverables and activities on the model display regardless of their individual access group assignments.

To restrict gate document configuration:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
   - **To add a new gate document** - In the **Component Tree** tab, click  next to the gate to add the gate document.
   - **To edit an existing gate document** - Expand the gate within the component tree and select the gate document.
4. Select the access group(s) to which the gate document belongs.

   The access groups displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. However, parent access group information is visible for access groups to which you have View permission.

   The gate document is selected to the highest level access group listed by default. Note that the gate document is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

   Process Designers with matching access group permissions will be able to navigate to and edit the gate document, depending on their individual access group permissions.
5. Click **Apply** to save your changes.

Process Model Component Tree

A component tree has been added to the process model configuration definition, displaying all Accolade objects associated with the process model, including stages, gates, deliverables, activities, custom layouts, metrics, matrices, charts, reports, queries, quick grids, templates, and workflows. With a quick view, Process Designers can determine which Accolade components have been correctly configured based on access group security restrictions.

To view a process model's related components:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Component Tree** tab to display the process components.

   The components are grouped by type and can be expanded for additional review. Clicking on the component name will display the process model's parent access group on the left, and the component's access group on the right.

    Misaligned components will be highlighted in the component tree with a  or  .
3. Review and align the configuration access groups using the following guidelines:

Field	Description
In Trouble 	This error states that the access group configuration of this item is inconsistent with one or more items that use it. To resolve, do one of the following: • If the mismatch is on the parent side, the issue can be resolved by

Field	Description
	aligning the process model's access group on the Security tab. • If the mismatch is on the component side, the issue can be resolved by aligning the component's access group in the component tree panel.
Warning 	This warning states that the access group configuration of an ancestor is inconsistent with one or more items that use it. This is usually resolved when the error at the parent level is addressed, If there is still a mismatch, do one of the following: • If the mismatch is on the parent side, the issue can be resolved by aligning the process model's access group on the Security tab. • If the mismatch is on the component side, the issue can be resolved by aligning the component's access group in the component tree panel.

4. Click **Apply** to save your changes.

How Changing Process Models Affects Open and Closed Projects

Review the information below before you make changes to an existing process model to understand how the changes are applied to open and closed projects.

Note: You cannot move stages, gates, deliverables, or activities within an existing model or change a model's process type.

	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
Process Definition			
Model Name	x		
Class	x	x	You can change the class, but only to one that uses the same process type. For example, you can change a gated model to be associated with another gated class, but cannot change a gated model to be non-gated. Any changes to class details, such as reason lists and icons, are applied to both open and closed projects.
Model Description			Applied only to projects created after the change.

	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
Active	x	x	Deactivating a model prevents the model from being used to create new projects, but has no effect on project's that use the model.
Set gates page to read-only	x	x	
Default Project Manager			Applied only to projects created after the change.
Extend project edit rights	x		Applied to all open projects.
Lead/Manager required on create	x		Applied only to projects created after the change.
Default Currency			Applied only to idea models. Applied only to projects created after the change.
Idea Deliverable			Applied only to idea models. Applied only to projects created after the change.
Related Document Categories	x	x	
Options	x		
Stages*			
Name	x		Applied to current and future stages.
Description	x		Applied to current and future stages.
Gates*			
Name	x		Applied to current and future gates.
Description	x		Applied to current and future gates.
Layout	x		Applied to current and future gates as appropriate.
Default Gate Owner	x		Applied to current and future gates.
Set Gate Date			Applied to future gates. Changes made do not impact past and current gates in existing projects.
Min/Max Gate Dates	x	x	Applied to all projects using the model.

	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
Automated Gate Decisions			Applied to current and future gates. The current and future gate decisions in existing projects are updated only when the metric values in the project are updated and match the new rules and conditions defined for the gate decision. Accolade does not reevaluate existing metric values if the model changes.
Gatekeepers	x		Applied to current and future gates.
Functions	x		Applied to current and future gates. Changes to the **Enforce function on user selection** option applies the next time a user selects a gatekeeper for the gate. If the gatekeeper assigned at the time of the change does not match the function, the gatekeeper is not removed from the gate.
Gate Documents			
Added Gate Documents	x		Applied to current and future gates as appropriate.
Deleted Gate Documents	x		Deleted documents are removed from current and future gates in open projects unless the document has a saved version within the project.
Name	x		Changes to the document name are applied to current and future gates in open projects unless the document has a saved version within the project. Saved document versions do not change. All other changes display in current and future gates in open projects, whether the document has a saved version or not.
Description	x		Applied to current and future gates.
Order	x		Applied to current and future gates.
Template	x		Changes to the document template are applied to current and future gates in open projects. Existing versions are not updated.
Options	x		Applied to current and future gates.

	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
Deliverables and Activities			
Added Project Documents	x		Applied to open projects in any stage to which they are added. Functions of added deliverables or activities are reflected in the project's **Team** page if they were not there before.
Deleted Project Documents	x		Deleted documents are removed unless the deliverable or activity has a saved version within the project stage. However, If an activity with a saved version belongs to a deliverable that is deleted, deleting the deliverable in the model also deletes the activity and its versions. Functions assigned to removed deliverables and activities are also removed from the project's **Team** page. If a deliverable with a saved version must be deleted or modified, the assigned owner or the Project Manager can delete the versions in the project before the model is changed. The deliverable must be set as deletable within the model.
Name	x		Changes to the document name are applied in open projects unless the document has a saved version within the project. If a deliverable or activity has an assigned resource, the changes to the name of the deliverable or activity in the comment for the demand row in Resource Editor is not updated until a separate action updates the demand row (for example, an owner or resource change).
Description	x		
Order	x		

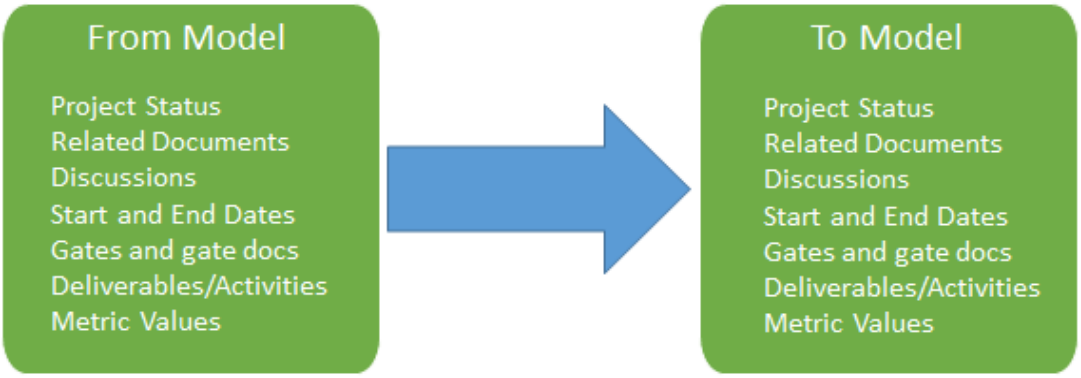
	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
User Function	x		Changes apply to unlocked stages in open projects. If a function is changed, the new function is added to the project's **Team** page. Changes to functions display on the project's **Stages** page if the deliverable or activity does not have an assigned owner. Changes to the **Enforce function on user selection** option applies the next time a user selects an owner for the deliverable or activity. If the owner assigned at the time of the change does not match the function, the owner is not removed from the assignment.
Added Condition Rule	x		Hides or shows the deliverable or activity in all stages.
Deleted Condition Rule	x		Shows the deliverable or activity in all stages.
Configuration Access Groups	x		Changes to the access definitions are applied to deliverable and activities without versions in open projects. If a deliverable or activity in an open project has one or more versions, the new access definitions are not applied to that deliverable or activity.
Template	x		Changes to the document template are applied in open projects. Existing versions are not updated.
Quick Grid	x		
Added Workflow	x		Adding a workflow in the model to an existing deliverable or activity applies the workflow in open projects, even if a document version has been saved.
Changed Workflow	x		Selecting a different workflow changes the workflow in an open project if the workflow is stopped.
Deleted Workflow	x		Removing a workflow removes the workflow from open projects if the workflow in the project is stopped and has no history.

	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
Workflow Options	x		Changing the **Activity Locking** setting applies unless the deliverable is in a workflow. The change is applied when the workflow is finished.
Workflow Template	x		Changes to the workflow template are applied in open projects with uncompleted deliverable or activities. .
Changed Publish on Upload Setting	x		Changes to the **Publish On Upload** setting are applied to deliverables and activities in open projects for versions uploaded after the setting is changed. Existing versions are not updated. For closed projects, activities added to deliverables in projects, and deleted deliverables or activities, the **Default New Versions to Published** system parameter serves as the default publish setting.
Process Assistance URL	x		
Options	x		
Start and Deadline Dates			Applied only to projects created after the change.
Pages			
Landing and Visible page selections	x	x	
Added Layout Condition Assigned Rules	x		Hides or shows the project page in all open projects.
Deleted Layout Condition Assigned Rules	x		Shows the project page in all open projects.
Metrics			
Added Metrics	x	x	
Deleted Metrics	x	x	Metric values are removed from open projects, and the metric is removed from any location where it displays in both open and closed projects. Metric values that were set in closed projects remain, and are available for reporting purposes.

	Changes Applied to Projects		
Changed Component	**Open**	**Closed**	**Notes**
Show/Edit	x	x	
Required	x	x	
Expressions	x	x	
Matrices			
Added Matrix	x	x	Enables the matrix regardless of whether a version of a Smart Excel template has been saved.
Deleted Matrix	x	x	Disables the matrix regardless of whether a version of a Smart Excel template has been saved.
Dependencies			
Dependencies	x		After adding or deleting a dependency to an existing deliverable or activity in the model, the user can determine what open projects the dependency is applied to. If **Push Dependencies** is clicked, the changes will be pushed to all open projects and will override existing project settings. If not, the changes will be applied only to projects created after the change.
Security			
Enforce Project Security			Applied only to new projects created using the model after the change is made.
Default Project Access Group			Applied only to idea models. Applied only to projects created after the change.
Restrict Projects To These Access Groups			If an existing project is now in an invalid access group based on the changes to the model, it remains there until a Process Manager or (Deprecated) Idea Manager with Manage Process rights edits the project details and selects a valid access group.
Reports			
Added Reports	x	x	
Deleted Reports	x	x	
Changed Report Contents	x	x	

* After a model is used in a project (open or closed) you can no longer add a stage or a gate.

Maps for Project Migration Overview



At times, a project may need to change process models. For example, when a concept or idea project has been approved and needs to move to a model that contains the development process. In this case, you can transfer all the data gathered through deliverables and activities in idea portions of the project to a new project that also contains the additional stages and gates that take the project through the development and release process.

Migration is intended to be an automatic process that depends on the identity of object names in the source and target models.

Project Migration Map Best Practices

Keep the following set of best practice recommendations in mind when creating maps to migrate projects from one process model to another:

- **Use the From and To Model Names in the Migration Map Name** - To help Process Managers identify the migration maps to use when migrating projects, include the original model and the model to migrate to in the migration map name. For example, From Idea Process - Development Process.
- **When You Update Models, Recreate Migration Maps** - Migration is based on the relationships between the models as they existed when the migration map was created. These relationships are not updated if a model changes. If models that are part of a migration map change, re-create maps that use those models to ensure the migration uses the most current model information.
- **Take Caution When Removing Objects from Models** - If objects such as deliverables, activities, and gate documents are removed from a model and then added back again, even using the same names, you must re-create existing migration maps that contain those models. Accolade identifies objects within a model with unique IDs that change when new ones are created, causing migrations to fail unless you re-create the migration map.

Criteria for Successful Project Migration

The characteristics of the source and the target model in a project migration map drives how successful a migration of a project is between the two models.

The following items are always migrated with a project, regardless of the source and target models:

- Project status messages
- Related documents and related document categories

  The related documents of deliverables and activities that are mapped keep their relationship with the mapped document. Related documents of deliverables and activities that are not mapped are migrated to related documents of the project, without a relationship to a deliverable or activity.
- Project discussions
- Deliverable discussions for mapped deliverables
- Start and end dates

The following items do not migrate, regardless of the source and target models:

- Stages
- Resource requests and allocations
- Microsoft Project plans and templates
- Quick grids

The items in the table below are migrated if they meet the listed requirements:

Project Component	Requirements for Migration
Gates	• Same relative position in the model (first gate, second gate, etc.). • Same name. • Same number of gatekeepers with matching gatekeeper functional areas.
Gate Documents	• Same name. • Located in gates with the same names. Only the latest version is migrated.
Deliverables	• Same name. Consider the following additional rules: • A target deliverable can map to at most one source deliverable. Deliverables are processed in the source and target models stage by stage, starting with the stage the source deliverable is in. The process continues with each following stage, looping back to the beginning of the model until it finds the first match to a target deliverable. • A file-based deliverable (with content) that does not map to a deliverable in the target model using the above rule, migrates to a

Project Component	Requirements for Migration
	related document in the target project. • A deliverable that includes an online form that does not map to a deliverable in the target model using the above rules, does not migrate to the target project. Only the latest version is migrated.
Activities	• Same name. • The activity's deliverable has been mapped to a deliverable in the target model. Only the latest version is migrated.
Workflow History	The associated deliverable or activity must successfully migrate.
Metric Values	• Same name. • Metric is available to both the source and the target models.

Notes:

- When matching project components between the source model and the target model, Accolade ignores initial spaces, initial numerals, and letter case, but not final spaces or numerals.
- Accolade adds gate documents, deliverables, and activities from the source project that do not have a direct match in the target model as related documents in the target project. If a deliverable is created as a related document, all of its activities also are created as related documents in the target project.
- Publishing older versions of a document that was included in a project migration or copy, or uploading a document that was downloaded from a source project into a new project, can update metrics in projects related to the source project, not the newly created migrated project. After a project is migrated, document owners should download the template or the latest version from the new project, refresh the data and update the project system ID references as necessary, and upload the document to the new project.
- The migration map does not control whether a project team or the project history migrates to the new project. Process Managers select whether to include this information when completing project migrations.

Creating Migration Maps

Process Designers create the maps that specify the source and target models for the migration or copy.

For example, when an idea project concludes successfully, Process Managers can move some or all of the project's information and team members to a development project, choosing the best structure to use to continue the project. Migrating projects allows the data gathered while the project was still considered an idea to carry over to the development project without having to be re-entered.

To create a migration map:

1. From the **System** menu, select **Process > Migration Maps**.
2. Do one of the following:
   - **To add a new migration map** - Click **Add New** in the upper right corner of the page.
   - **To edit an existing migration map** - Click the name of the migration map to open it for editing.
3. Complete the following information about the migration map:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the migration map. To identify the exact purpose of the migration map, consider using a name that identifies the source and target models. For example, **Idea Decision Project - Stage Gate Development Project**.
System Name	Enter a unique, shorter name that identifies the migration map. The name must be unique among migration maps and can contain only letters (English alphabet), numbers, and the underscore.
From Model	Select the process model the project uses prior to the migration.
To Model	Select the process model the project uses after the migration.

4. Select the **Active** check box when the migration map is ready to use to migrate and copy projects.
5. To help ensure consistency in project migrations, select the details about the source project to assign and copy to the new project when using this migration map.

   For example, to assign the current project team with the current document assignments to the migrated project, select the **Retain project team** check box.

   - **Copy project links** - select to copy the project links from the original project to the new project.

- **Close source project** - select to close the original project after the migration to the new project is complete.
- **Retain project access group** - select to retain the access group from the original project.
- **Retain project history** - select to copy the project history from the original project into the new project.
- **Retain project Manager** - select to retain the project manager from the original project.
- **Retain project team** - select to retain the project team members from the original project.

6. If the **Allow Mid-Process Start for Migration** option is set for the process models included in the migration, select the stage or gate in which the new project starts.
7. Click **Done** to save your changes.

Notes:

- When migrating or copying a project, Process Managers and (Deprecated) Idea Managers with Migrate Project rights can select to change whether to retain a project team, project history, and project links, and whether to close the original project. The settings in the migration map are the default selections for those options.
- Migration maps can only include active process models. If a process model is inactive, any migration maps that include it in the **To Model** field are also inactivated.
- To delete a migration map, display the migration map and click **Delete**.

Exercises - Creating Migration Maps

Try out what you have learned!

- Copy the gated model you created in earlier exercises and add an additional stage and gate at the end of the model.
- Create a map using the original gated model as the source, and map it to the new model, ensuring that the original project is not closed by default on migration.

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