



# Acclaim Projects & Kanban

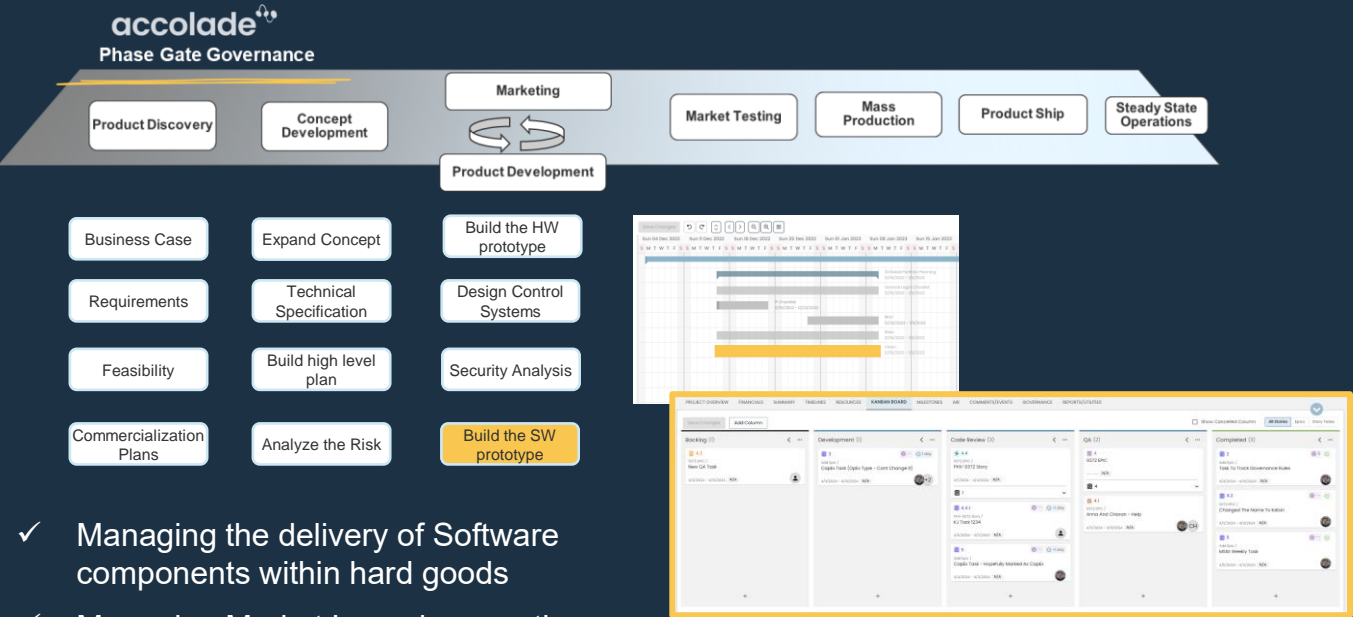
2024

Ketan Jahagirdar

- ✓ **Use Cases for Sopheon Customers**
- ✓ **Using Kanban to manage Projects**

# Use Cases for our Customers

## New Product Development



- ✓ Managing the delivery of Software components within hard goods
- ✓ Managing Market Launches or other projects being managed using Kanban
- ✓ Ongoing management of software products
- ✓ According to a Difital.ai survey, Engineering/R&D are the fastest adopter of agile, up 16% since 2022

## IT, Marketing, Procurement



- ✓ Acclaim Projects now provides PMOs and IT departments a single solution to use all three of the leading Project Management methodologies commonly used
- ✓ Provides product managers and project managers the ability to use Kanban to drive IT and Business projects
- ✓ Provides the framework for us to pull data from JIRA and Azure DevOps to provide PMO oversight
- ✓ Kanban Templates allows PMOs to provide pre-configured Kanban Workflows for IT, Marketing, Procurement and other department specific repeatable projects

# Running a project using Kanban

## Step 1 – Create a Kanban Project

- ✓ Select Kanban as the Project Type OR
- ✓ Select a Kanban Template that has been setup by your PMO



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## Step 2a – Setup your Kanban Workflow

- ✓ Unless you are using a template that has been setup by your PMO, doclaim projects creates a default setup in your workflow
  - ✓ Backlog
  - ✓ In-Progress
  - ✓ Completed
  - ✓ Cancelled
- ✓ Default Columns or workflow status can be renamed but cannot be deleted (only by Admins)



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## Step 3 – Add your Team/ Resource POD

- ✓ Select Kanban as the Project Type OR
- ✓ Select a Kanban Template that has been setup by your PMO



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## Step 4 – Add cards(work) to the board

- ✓ There are two ways to add cards to a Workflow Step (column)



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## Step 5 – Moving Cards along the workflow

Tracking Time

Cards can be moved between workflow steps by:

1. Dragging them
2. Right-clicking on a card and selecting the 'Move' option

Important Card Movement rules:

1. If the project is in 'Planned' status, cards are not allowed to be moved.
2. Cards can be moved to the 'In-Progress' status only if the project is in 'In-Progress'.
3. When a card is cancelled, all associated cards are cancelled.



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## Step 6 – Tracking Time and Dollars Spent

EE Mode

Time Can be tracked against:

- ✓ User Story
- ✓ Task
- ✓ EPIC
- ✓ Defect

This application will log hours against items tracked and can be reviewed in the Financial Ledger for the project


3 Spend and Hours worked can also be seen in the Financials Tab on the Card



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## Step 7- Managing Change in Kanban

Change Control in Kanban Projects works the same as it does for Waterfall and Scrum – No Change @



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## Step 8 - Managing Financials in Kanban

Budgeting – No change in this area.

Planned Costs –

- Fixed Costs – No change in this area.
- Planned Hourly Labor – For your PMO and those to assign hours, you can add if you want planned or actual – this gives a breakdown of hours to identify who is doing the work.
- You can filter planned hours, labor and let your track actuals and ETC for cost.

Actuals – No change in this area.



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# Step 1 – Create a Kanban Project

- ✓ Select Kanban as the Project Type **OR**
- ✓ Select a **Kanban Template** that has been setup by your PMO

acclaimprojects QA Workspace Plan Manage Reports & Analytics Timecards Log Out

+ Project Search projects sopheon ?

acclaim Projects / Plan / Create Project

Project Templates Select... Load Template

MAIN

Name\* Kanban Project Tutorial

Ref#

Description

Created From Template None

Type\* Kanban

Program Waterfall Project

Portfolio Kanban

Queue Scrum Project

Target Start Planned Start Projected Start Actual Start

Target End Planned End Projected End Actual End

Project Sponsor None

Project Manager None

Project Requestor Ketan Jahagirdar\_PM

Sponsoring Cost Center

Attributes

Add New Attribute

Attribute Name

Global

fdss

Estimation

Customers

Goals & Objectives

Scope

Stakeholders

Access

General Project Settings

Notification Settings

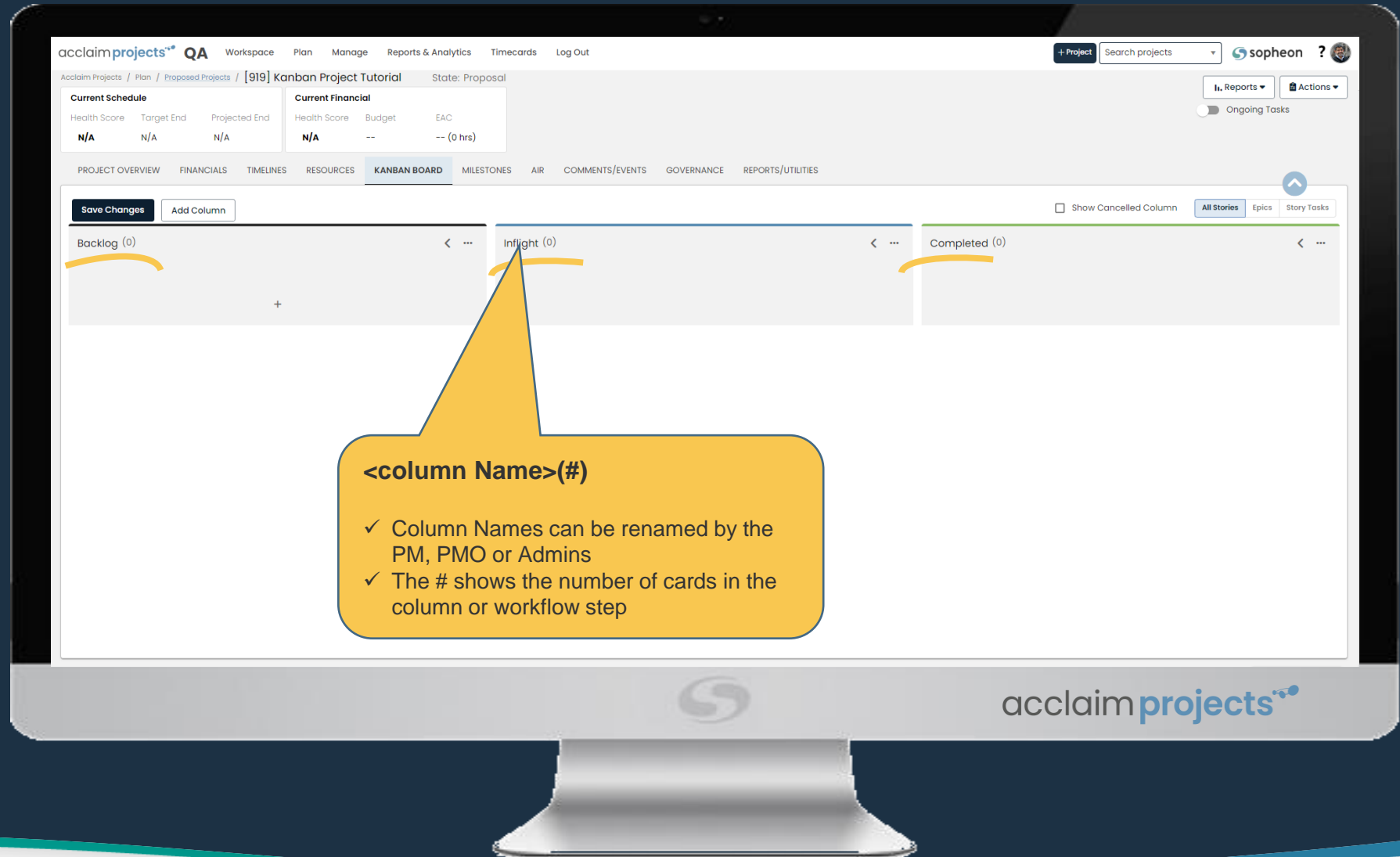
Reset Clear Validation Create

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# Step 2a – Setup your Kanban Workflow



- ✓ Unless you are using a template that has been setup by your PMO, Acclaim projects creates 4 default steps in your workflow
  - ✓ **Backlog**
  - ✓ **Inflight**
  - ✓ **Complete**
  - ✓ **Cancelled** (hidden by default)
- ✓ Default Columns or workflow states can be renamed but cannot be deleted (even by Admins)



# Step 2b – Importance of default columns

Customizing workflows

- ✓ Unless you are using a template that has been setup by your PMO, Acclaim projects creates 4 default steps in your workflow

- ✓ Backlog
- ✓ Inflight
- ✓ Complete
- ✓ Cancelled (hidden by default)

- ✓ Default Columns (workflow states) can be renamed but cannot be deleted, even by Admins

The screenshot shows the Acclaim Projects Kanban Board interface. The top navigation bar includes 'Acclaim Projects', 'QA', 'Workspace', 'Plan', 'Manage', 'Reports & Analytics', and 'Time'. The main header shows 'Acclaim Projects / Plan / Proposed Projects / [919] Kanban Project Tutorial' and 'State: Proposal'. Below this are two tables: 'Current Schedule' and 'Current Financial'. The 'Current Schedule' table has columns for Health Score, Target End, and Projected End, with values N/A, N/A, and N/A respectively. The 'Current Financial' table has columns for Health Score, Budget, and EAC, with values N/A, --, and -- (0 hrs) respectively. The main content area is the 'KANBAN BOARD' with tabs for PROJECT OVERVIEW, FINANCIALS, TIMELINES, RESOURCES, KANBAN BOARD, MILESTONES, AIR, COMMENTS/EVENTS, GOVERNANCE, and REPORTS/UTILITIES. The Kanban Board shows three columns: Backlog (0), Inflight (0), and Completed (0). A 'Show Cancelled Column' checkbox is visible. Callouts provide details for each column: Backlog Column (one column, draft cards, renamed as Backlog), Inflight Columns (multiple columns, blue line at top, moved to Inflight only, time and ETC tracked, EZ Mode slider activated), Completed (one column, renamed, set to 0, marked as complete, time not tracked, EZ Mode slider set to 100%), and Cancelled (All CapEx converted to OpEx, time cannot be tracked).

**Cancelled**

- ✓ All CapEx is converted to OpEx
- ✓ Time cannot be tracked against cancelled tasks

**Backlog Column**

- ✓ There is only one backlog column in any given workflow
- ✓ All cards in this step are essentially draft cards
- ✓ Even if renamed, it will continue to work as the Backlog column

**Inflight Columns**

- ✓ All inflight cards will have a blue line at the top
- ✓ Kanban workflows in Acclaim Projects can be customized to have multiple In-Flight columns
- ✓ Cards can be moved to inflight columns ONLY if the project itself is in Pending/Inflight state
- ✓ Time and ETC can be tracked against a card only when it is in one of the Inflight Columns
- ✓ EZ Mode slider is also activated only when cards are in one of the inflight columns

**Completed**

- ✓ There can only be one Completed Column and exhibit characteristics of the Completed column even when renamed
- ✓ When cards are moved to this column, ETC will be set to 0 and the card is marked as complete
- ✓ You can not track time against a card that is marked complete
- ✓ In the EZ Mode, the % complete value will be set to 100%

# Step 2c – Customizing your Workflow

- ✓ Unless you are using a template that has been setup by your PMO, Acclaim projects creates 4 default steps in your workflow

- ✓ Backlog
- ✓ Inflight
- ✓ Complete
- ✓ Cancelled (hidden by default)

The screenshot shows the Acclaim Projects Kanban Board for a project named 'Kanban Project Tutorial'. The interface includes a top navigation bar with tabs like 'Workspace', 'Plan', 'Manage', 'Reports & Analytics', 'Timecards', and 'Log Out'. Below the navigation bar, there are sections for 'Current Schedule' and 'Current Financial'. The main area displays a Kanban board with columns: 'Task Backlog (0)', 'Development (0)', 'Code Review (0)', 'QA (0)', 'Product Mgr. Signoff (0)', and 'Completed (0)'. A yellow callout box points to the 'Add Column' button above the 'Task Backlog' column, stating: 'As the PM, PMO or Admin you can rename your columns or add new sub-states to the Inflight-State;'. Another yellow callout box points to the 'Development', 'Code Review', 'QA', and 'Product Mgr. Signoff' columns, stating: 'It is important to know that the application will create all new workflow steps (columns) as “sub-states” of the In-flight State; All new columns will have a blue line at the top of them'. A third yellow callout box points to the 'Product Mgr. Signoff' column, stating: 'In this example, resources can track time or adjust the EZ Mode % complete tracker as long as they are in any of the 4 Inflight Steps (Development, Code Review, QA & Product Mgr. Signoff)'. The bottom of the screen shows the 'acclaimprojects' logo.

As the PM, PMO or Admin you can rename your columns or add new sub-states to the Inflight-State;

It is important to know that the application will create all new workflow steps (columns) as “sub-states” of the In-flight State; All new columns will have a blue line at the top of them

In this example, resources can track time or adjust the EZ Mode % complete tracker as long as they are in any of the 4 Inflight Steps (Development, Code Review, QA & Product Mgr. Signoff)



# Step 2d – Kanban Templates

- ✓ As a member of the PMO team, you can create multiple templates (Boards) to represent specific Kanban Process workflows such as
  - ✓ SW Development
  - ✓ Product Launch
  - ✓ Market Analysis
  - ✓ R&D
- ✓ Templates can be created with or without backlog tasks



# Step 3 – Add your Team/ Resource POD

- ✓ Select Kanban as the Project Type **OR**
- ✓ Select a **Kanban Template** that has been setup by your PMO

acclaimprojects QA Workspace Plan Manage Reports & Analytics Timecards Log Out

Acclaim Projects / Plan / Proposed Projects / [919] Kanban Project Tutorial State: Proposal

Current Schedule: Health Score N/A, Target End N/A, Projected End N/A

Current Financial: Health Score N/A, Budget --, EAC -- (0 hrs)

PROJECT OVERVIEW FINANCIALS TIMELINES **RESOURCES** KANBAN BOARD MILESTONES AIR COMMENTS/EVENTS GOVERNANCE

Find Resources by Group Resource to add... Add Resource(s) Save Changes Cancel Changes

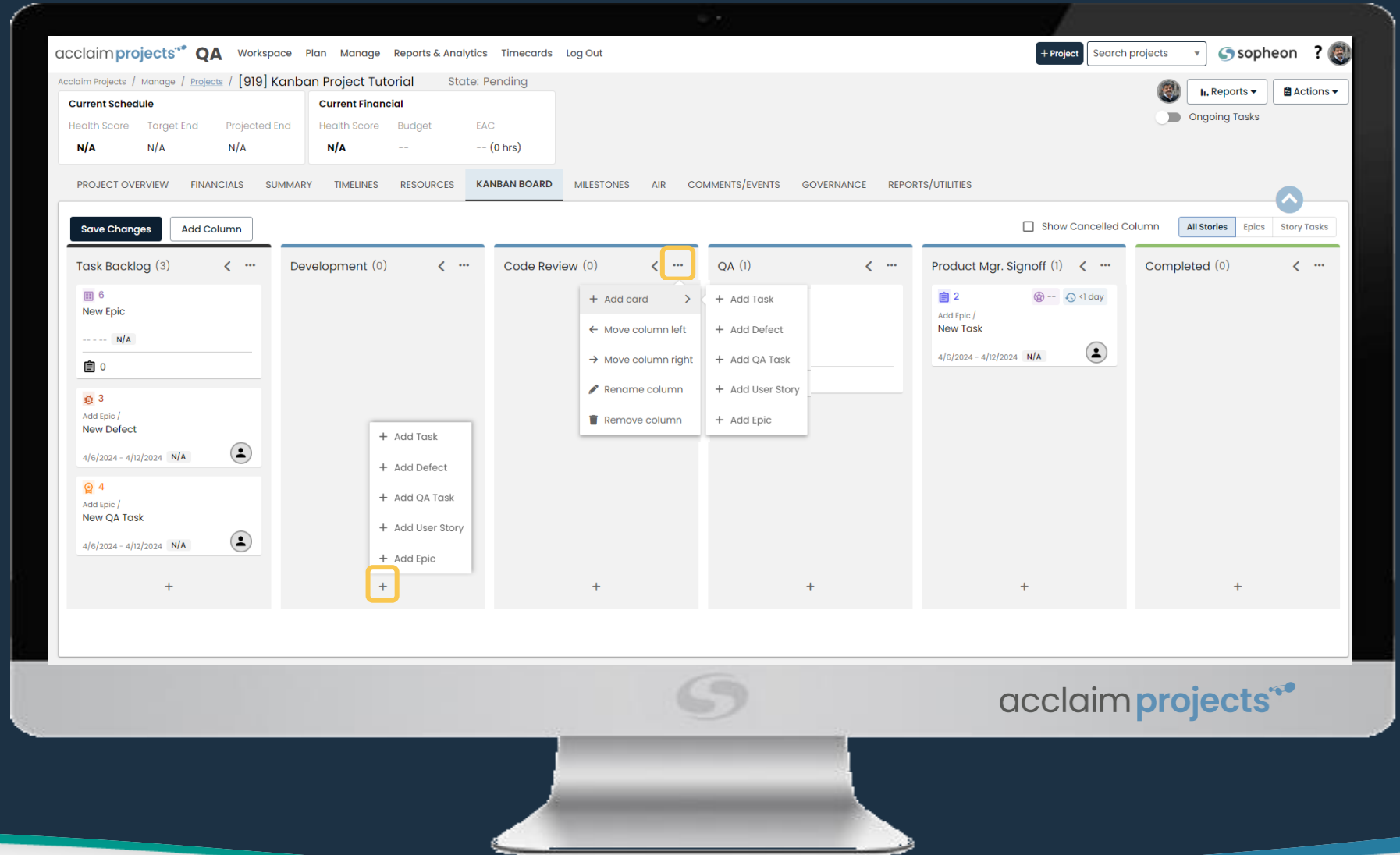
Resource	Last Access	Capacity on this Project	Planned Hours	Spent Hours	ETC	EAC	Vendor	Project Role(s)	Job
Ketan Jahagirdar_PM	4/6/2024 1:47 PM	8	0	0	0	0	--	Resource	.NET Developer, Capex Work, Marketing, Opex Work, Purchasing, Zach_4072_CapexWork, Zach_4072_OpexWork
Cal Hueber	1/12/2023 2:02 PM	8	0	0	0	0	--	Resource	Purchasing
diego bautista	4/5/2024 12:56 PM	8	0	0	0	0	--	Resource	.NET Developer, Capex Work, Marketing, Opex Work, Purchasing, Zach_4072_CapexWork, Zach_4072_OpexWork
Russell Fujia	1/12/2024 1:21 PM	8	0	0	0	0	--	Resource	Marketing, IT, Purchasing

Grid to Excel Grid to PDF

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# Step 4 – Add cards(work) to the board

- ✓ There are two ways to add cards to a Workflow Step (column)



# Step 4 – Card Types Supported

- ✓ Acclaim Projects Supports the following Cards



Epic



User Story



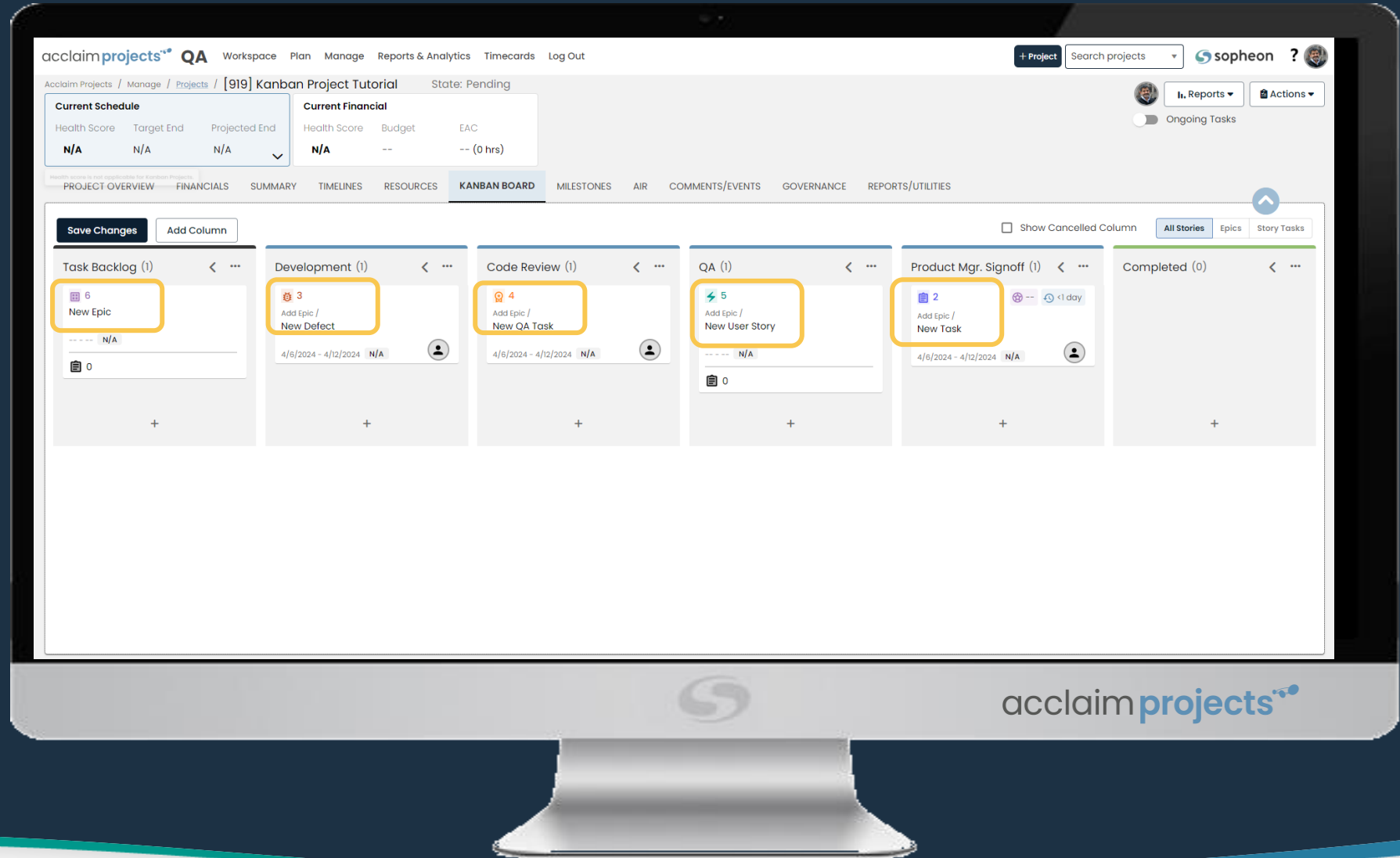
Task



QA Task

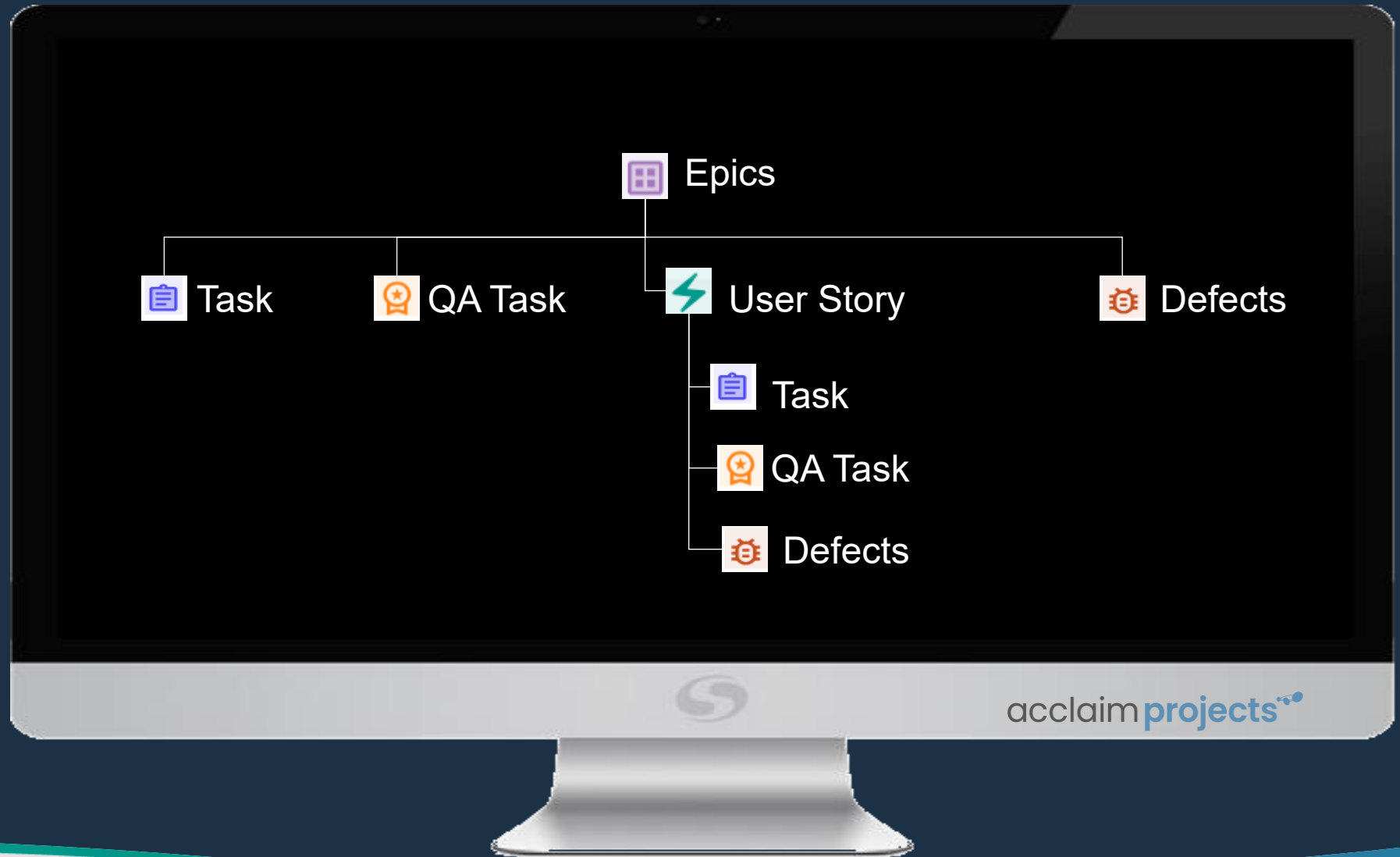


Defect



# Step 4 – Card Hierarchies Supported

In addition to the Hierarchies show here, please note that all cards can be added to Milestones. **Milestones** can be used in lieu of features until they are added to the product.



# Step 4 – Understanding the Card Editor

Edit Title

Add the description  
for the Card

Add/Change/Delete  
Story points

Control Tracking  
mode

Manage  
Assignments

Calculated %  
complete(overall  
workflow) for the card

Set planned  
start and end  
dates

Monitor  
Status of the  
Card

Backlog / 1





### Kanban Task

BACKLOG

Add a description...

Assignments Attachments

Filter by resource name

Assigned	Resource	Work Category	Planned Hours	% Complete	Task Complete?	Spent	EAC	ETC
★ <input checked="" type="checkbox"/>	 Ketan Jahagirdar (8hrs/day)	Engineer CapEx	0	0% <input type="text"/>	<input checked="" type="checkbox"/>	0	0	0
☆ <input type="checkbox"/>	 Ketan Jahagirdar (8hrs/day)							
☆ <input checked="" type="checkbox"/>	 Eric France (8hrs/day)	Engineer CapEx	0	0% <input type="text"/>	<input checked="" type="checkbox"/>	0	0	0
☆ <input checked="" type="checkbox"/>	 Tanya Lazarus (8hrs/day)	Engineer CapEx	0	0% <input type="text"/>	<input checked="" type="checkbox"/>	0	0	0

+ Add Resource

Details

Story Points

Tracking Mode  
EZ Mode

Labor Expense Type  
OpEx

Health Score  
N/A

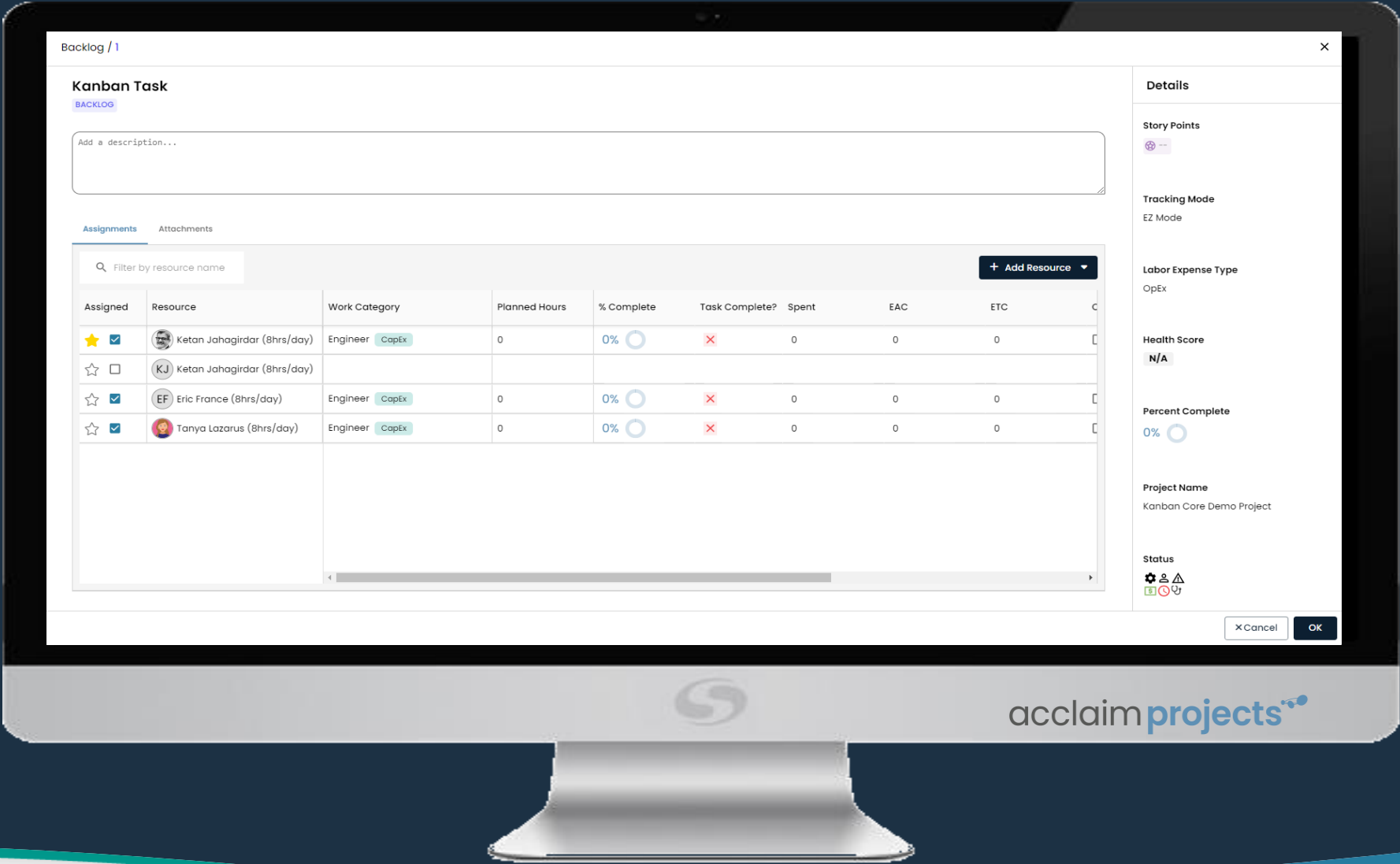
Percent Complete  
0%

Project Name  
Kanban Core Demo Project

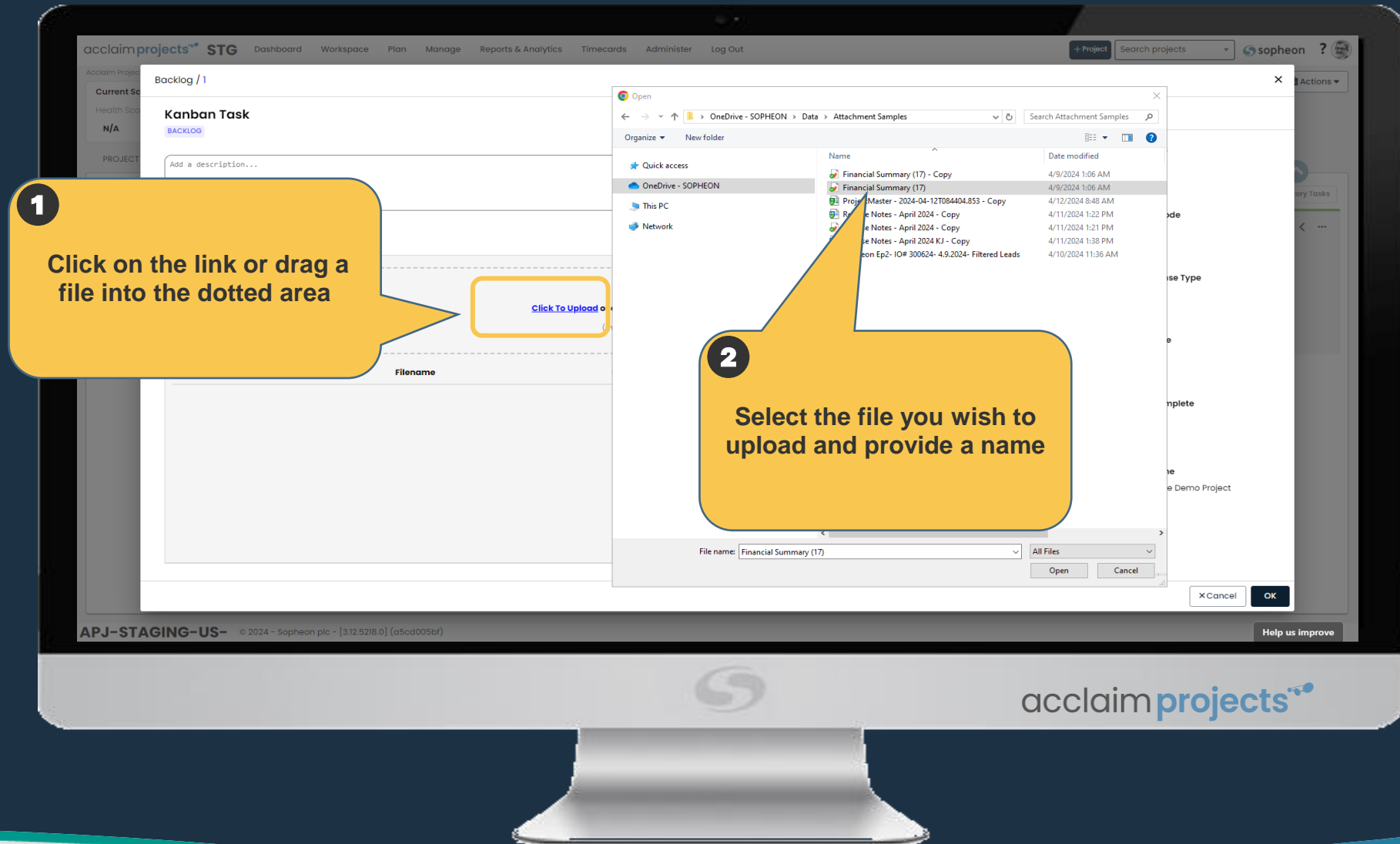
Status

acclaimprojects

# Step 4 – Assign resources to cards



# Step 4 – Manage Attachments on cards





# Step 4 – Manage Attachments on cards

The screenshot displays the 'Kanban Task' interface in the 'acclaimprojects' application. The main area shows a file upload section with a dashed box and the text 'Click To Upload or drag and drop files here. (max 16 MB)'. Below this is a table of attachments:

Name	Filename	Uploaded On	Uploaded By
Financial Summary Name Change	Financial Summary (17).pdf	4/13/2024, 3:40:49 PM	Ketan Jahagirdar

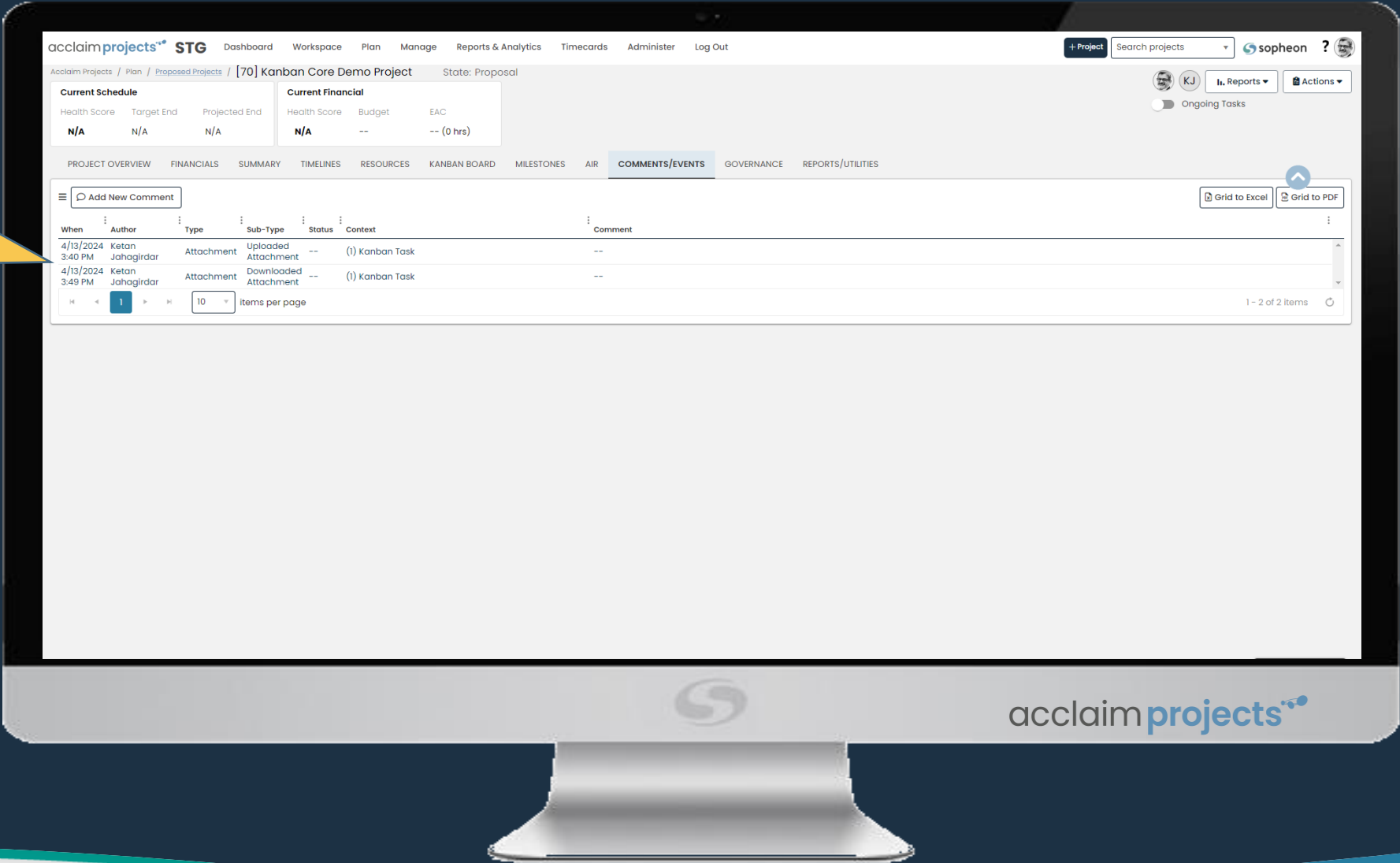
Yellow callout boxes provide additional context:

- Original File Name**: Points to the 'Filename' column in the table.
- When user hovers on the row, the application shows the download and delete icons**: Points to the download and delete icons in the 'Uploaded By' column.
- Name that the User provided**: Points to the 'Name' column in the table.
- Upload info – Who and when**: Points to the 'Uploaded On' and 'Uploaded By' columns in the table.

The right sidebar shows details for the task, including Story Points, Tracking Mode, Labor Expense Type, Health Score, Percent Complete, Project Name, and Status.

# Step 4 – Audit Trail

Clicking on the Comments/Events show an audit trail of when documents were uploaded and downloaded and by whom



# Step 5 – Moving Cards along the workflow

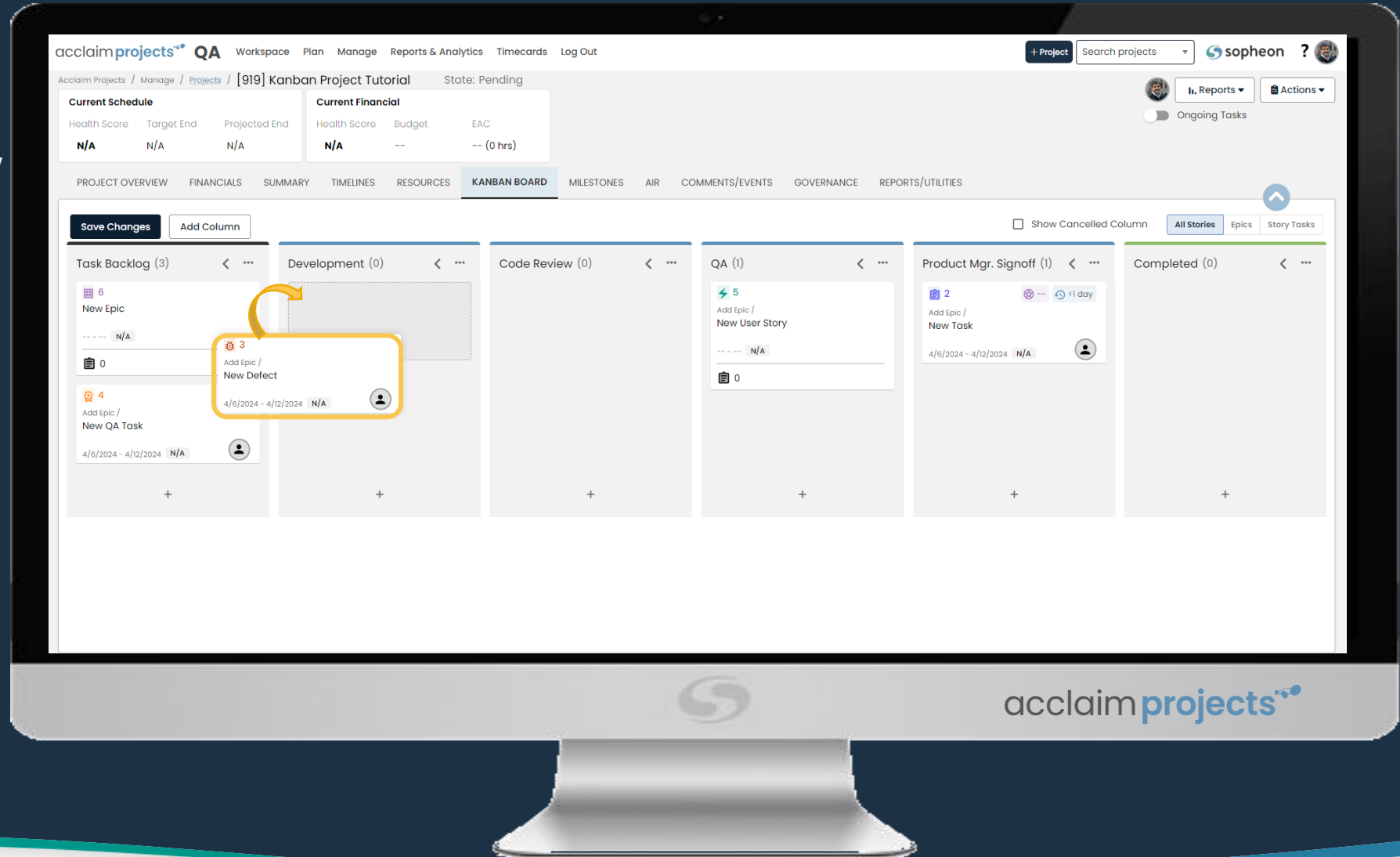
Tracking Time

Cards can be moved between workflow steps by

1. Dragging them
2. Right clicking on a card and selecting the new target workflow step

## Important Card Movement rules





1. If the project is in Proposed/Submitted state, cards are restricted to the Backlog
2. Cards can be in the Inflight Sub-states only if the Project is In-Flight/Pending
3. When a project is Cancelled, all non-completed cards are cancelled



# Step 6 – Tracking Time and Dollars Spent

EZ Mode

Time Can be tracked against

-  User Story
-  Task
-  QA Task
-  Defect

The application will log dollars against hours reported and can be reviewed in the Financial Ledger for the project

\$ Spent and Hours worked can also be seen in the Assignments Tab on the Card



**1** Just Make sure that the Tracking Mode is set to "Hours and ETC" and the card is one of the inflight sub-states

**2** Resources are Assigned to the Task. Planned hours are optional in Kanban – Merely assigning resources enables the card to show up on their timecard

Assigned	Resource	Work Category	Planned Hours	Days Left	% Complete	Task Complete?	Spent	EAC	ETC
<input type="checkbox"/>	diego bautista (8hrs/day)								
<input checked="" type="checkbox"/>	RF Russell Fuja (8hrs/day)	Marketing CapEx	40		0%	<input checked="" type="checkbox"/>	8	8	
<input checked="" type="checkbox"/>	CH Cal Hueber (8hrs/day)	Purchasing CapEx	40		0%	<input checked="" type="checkbox"/>	8	8	
<input checked="" type="checkbox"/>	Ketan Jahagirdar_PM (8hrs/d	JNET Developer CapEx	40		0%	<input checked="" type="checkbox"/>	8	8	

# Step 6 – Tracking progress using EZ Mode

Progress can be tracked against



✓ User Story



✓ Task



✓ QA Task



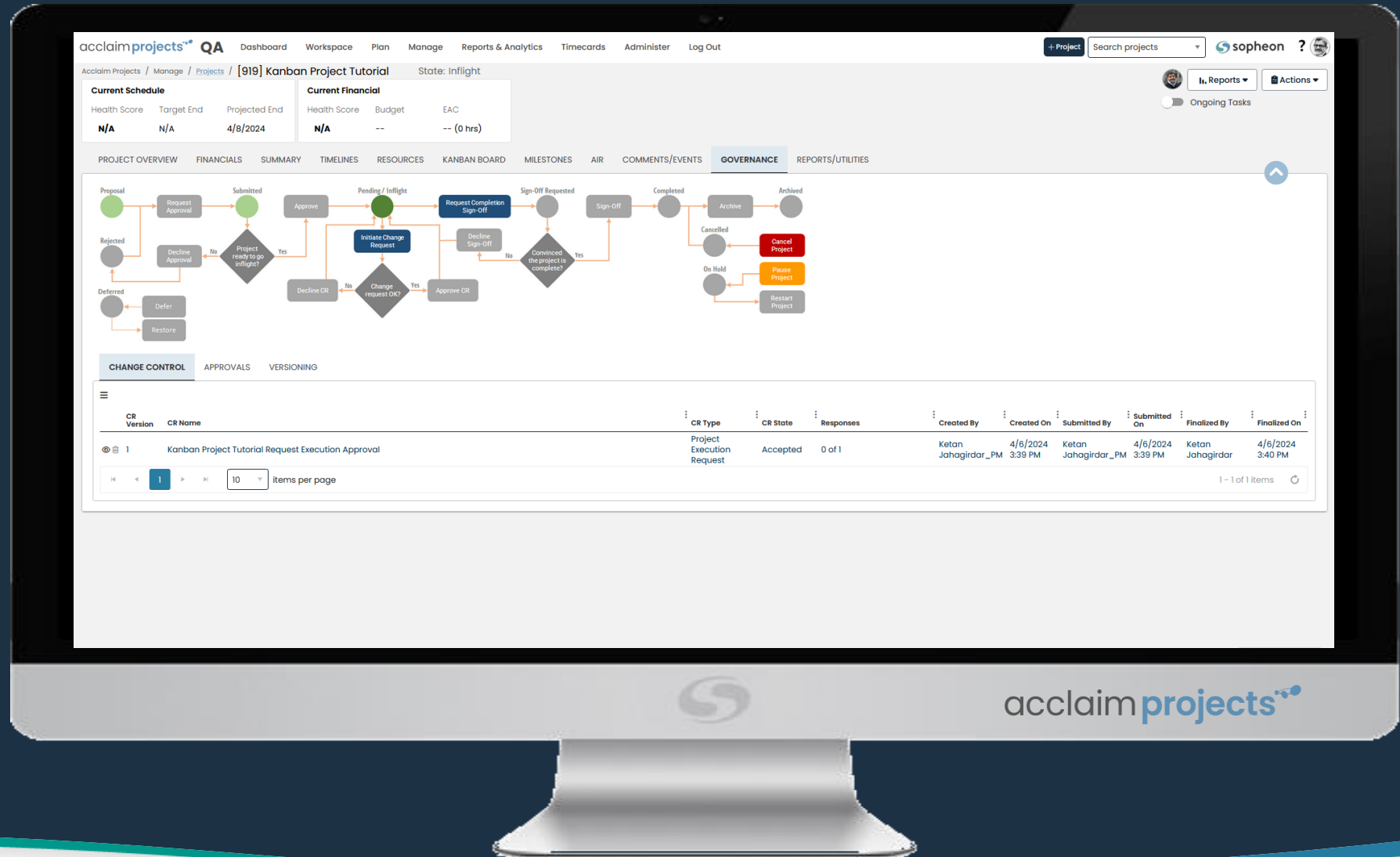
✓ Defect

Cards in EZ Mode will show up on the assignee's workspace as soon as the card is moved into one of the In-Flight Sub-States.



# Step 7- Managing Change in Kanban

Change Control in Kanban Projects works the same as it does for Waterfall and Scrum – No Change 😊



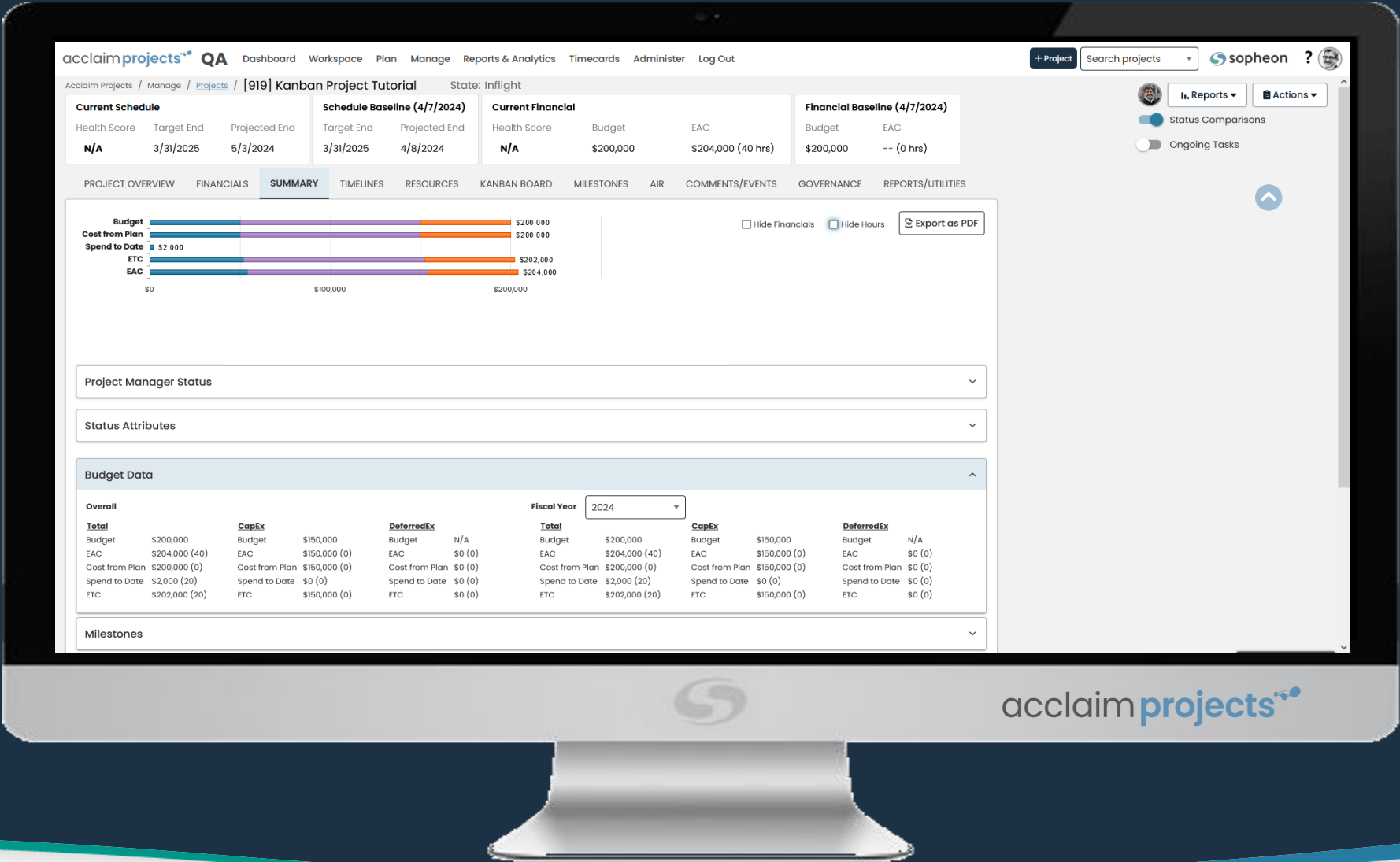
# Step 8 - Managing Financials in Kanban

**Budgeting** – No change in this area.

**Planned Costs** –

- **Fixed Costs** - No change in this area.
- **Planned Hourly Labor** – For now PMs will have to assign hours per card if you want planned vs actual – We are thinking of ways to simplify this in future releases.
- You can leave planned hours blank and let user track actuals and ETC for now

**Actuals** – No change in this area.



# Thank you

For your attention



Empowering organizations to change the world™