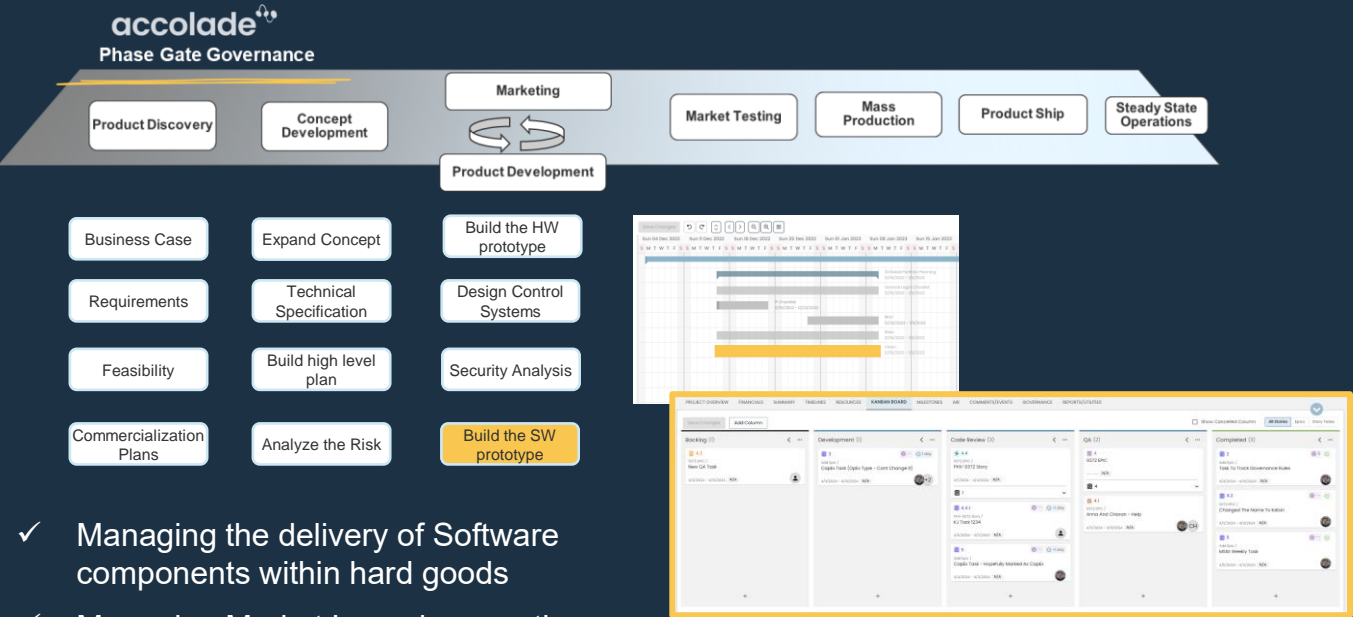# sopheon

Acclaim Projects & Kanban

2024

Ketan Jahagirdar

- ✓ **Use Cases for Sopheon Customers**

- ✓ **Using Kanban to manage Projects**

Use Cases for our Customers

New Product Development

accolade
Phase Gate Governance

Product Discovery | Concept Development | Marketing / Product Development | Market Testing | Mass Production | Product Ship | Steady State Operations

Business Case	Expand Concept	Build the HW prototype
Requirements	Technical Specification	Design Control Systems
Feasibility	Build high level plan	Security Analysis
Commercialization Plans	Analyze the Risk	Build the SW prototype

✓ 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

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✓ 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

Select Kanban from the drop-down list
1. Waterfall
2. **Kanban**
3. Scrum

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Step 2a – Setup your Kanban Workflow

✓ Unless you are you 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)

<column Name>(#)

✓ Column Names can be renamed by the PM, PMO or Admins
✓ The # shows the number of cards in the column or workflow step
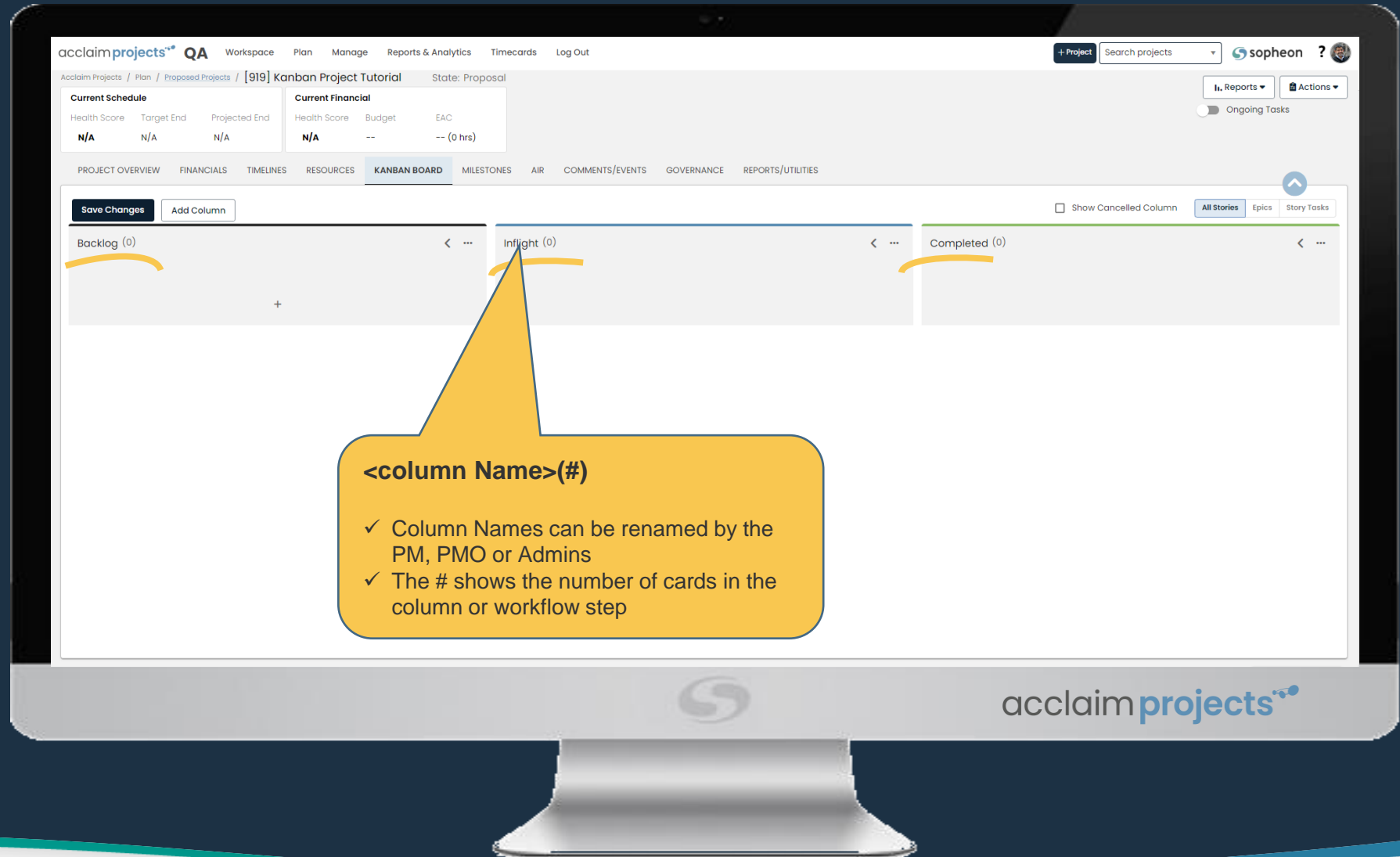
Step 2b – Importance of default columns

✓ Unless you are you 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

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 you 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)

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

Kanban Template (Board) for SW Development

| Backlog | Development | Code Review | QA | PM Review | Launch |

Kanban Template (Board) for Market Launches

| Backlog | Positioning | Branding Plan | Promotions | Launch |

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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

Add your Team members just like you would on a Waterfall or a Scrum Project.

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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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Card Types Supported
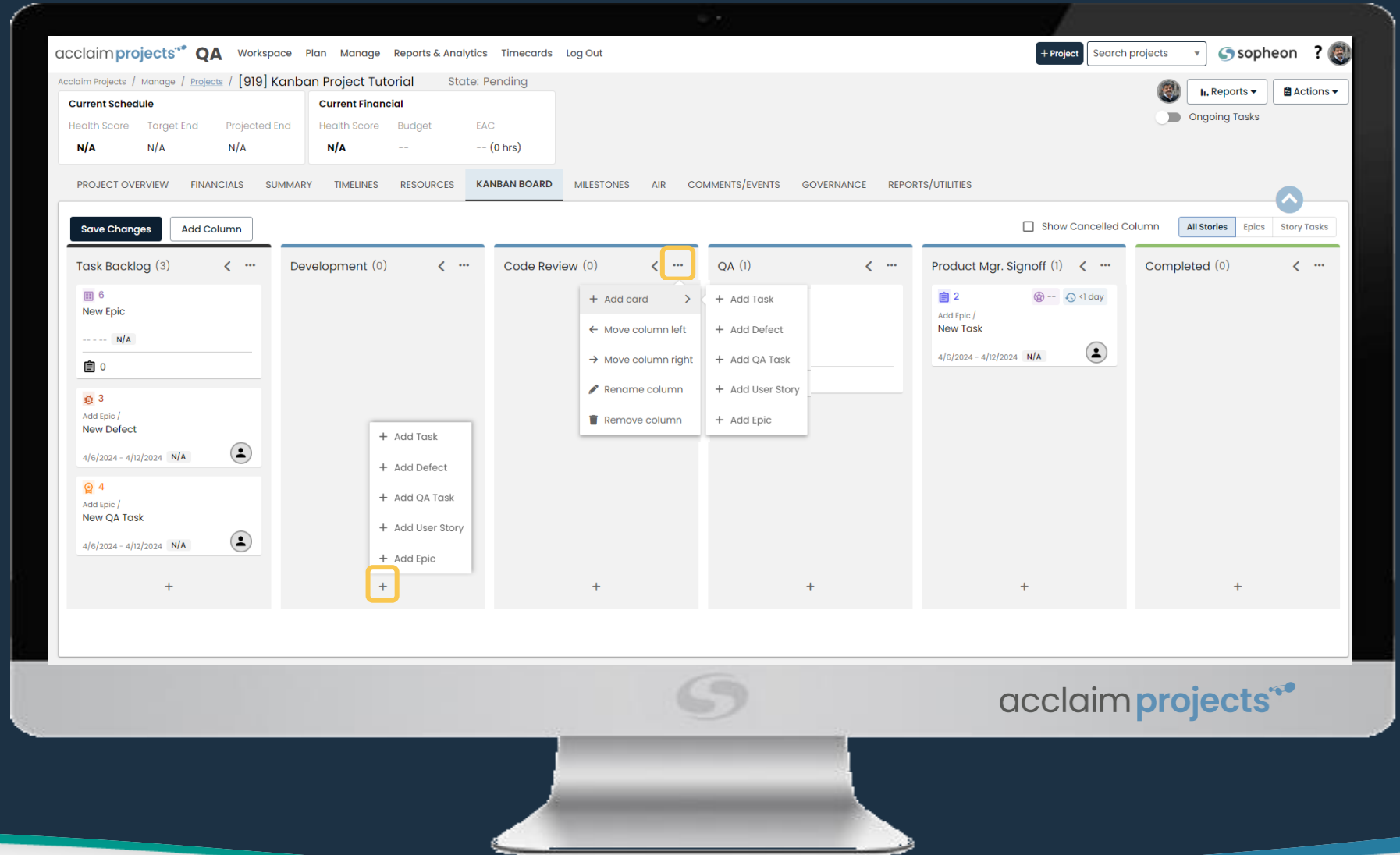
Step 4 – Card Types Supported

✓ Acclaim Projects Supports the following Cards

Epic

User Story
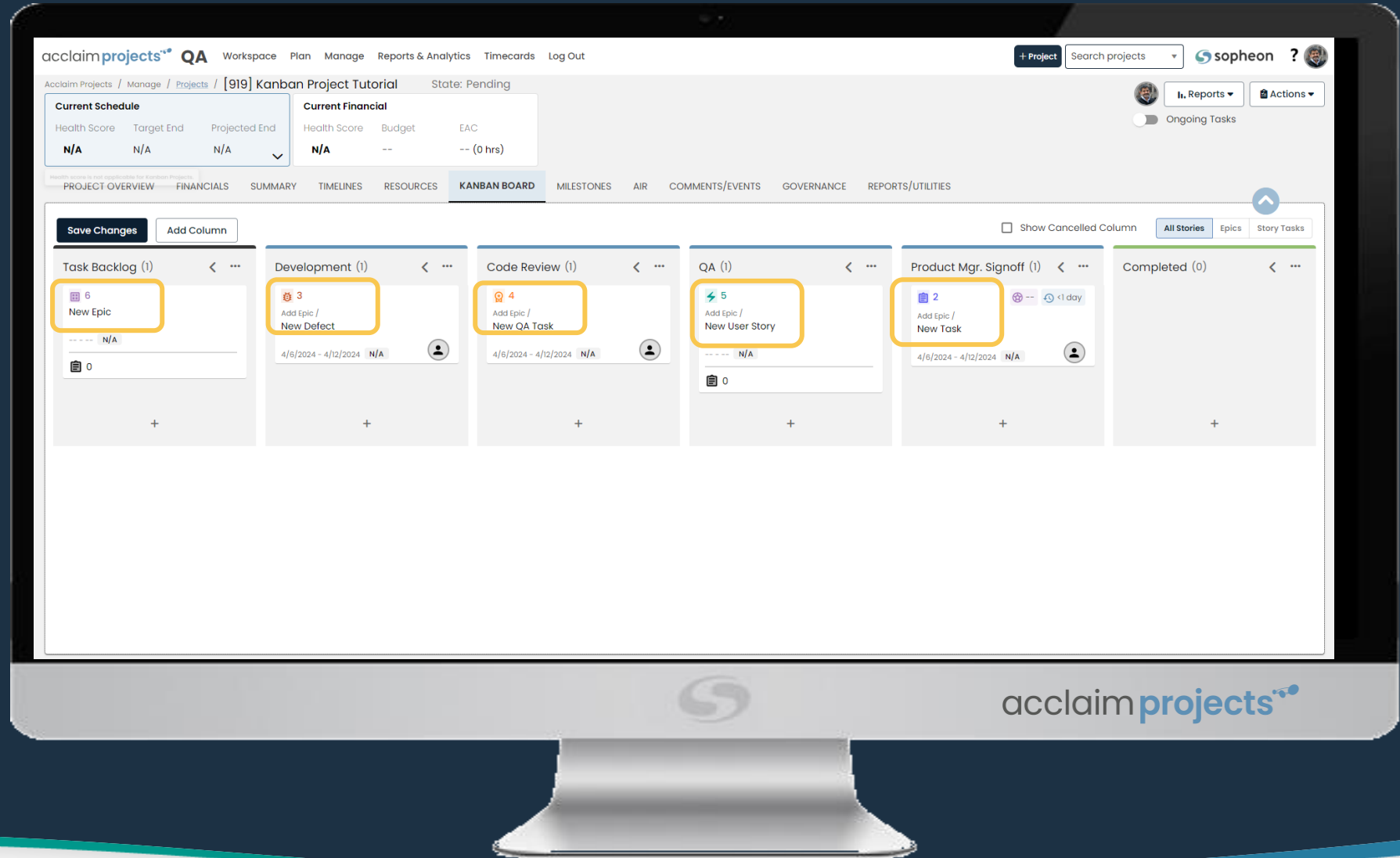
Task

QA Task
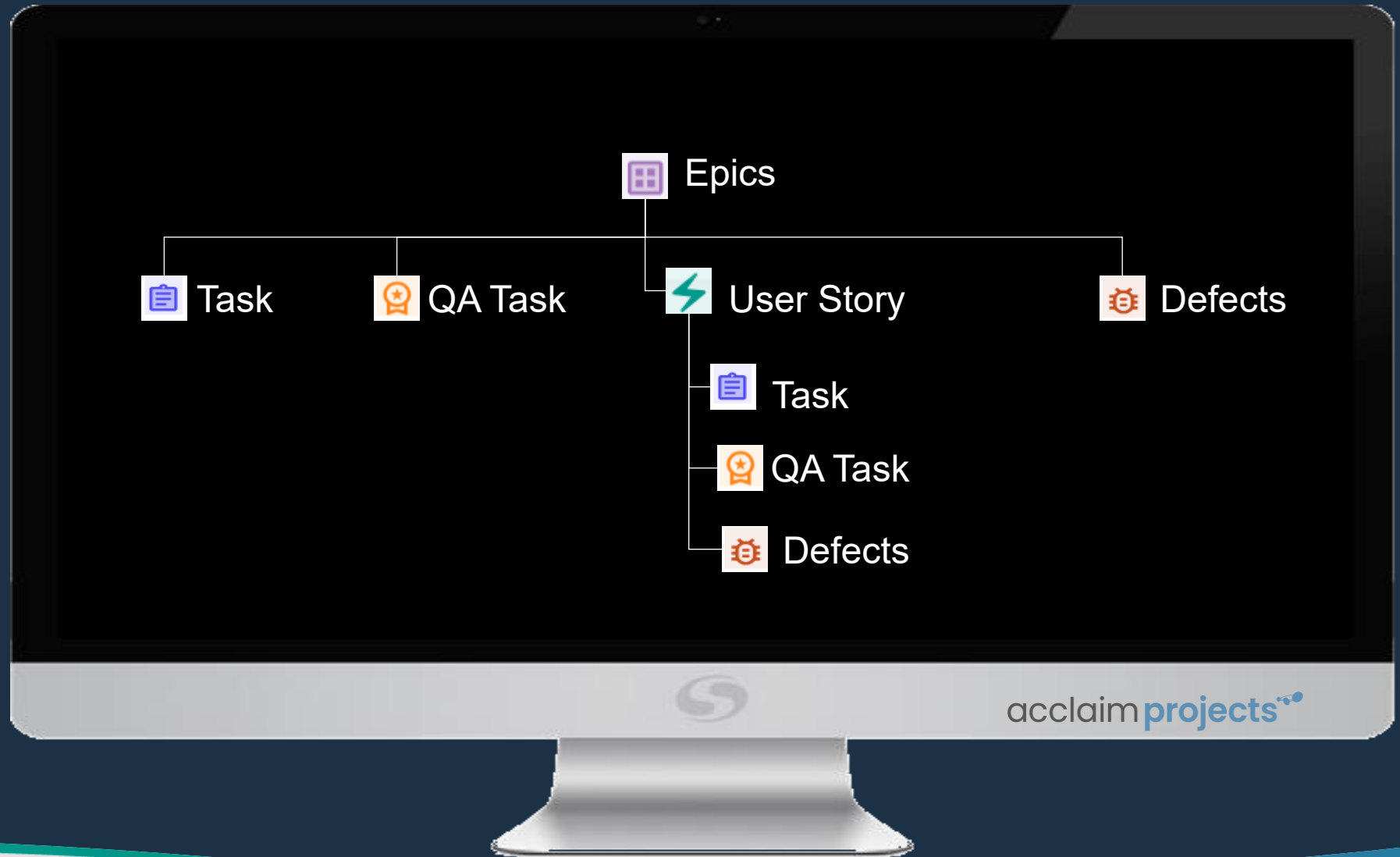
Defect

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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

Set planned start and end dates

Calculated % complete(overall workflow) for the card

Monitor Status of the Card

Step 4 – Assign resources to cards

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Attachments

Step 4 – Manage Attachments on cards

1 Click on the link or drag a file into the dotted area

2 Select the file you wish to upload and provide a name

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Step 4 – Manage Attachments on cards

Step 4 – Audit Trail

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

Moving Cards through process

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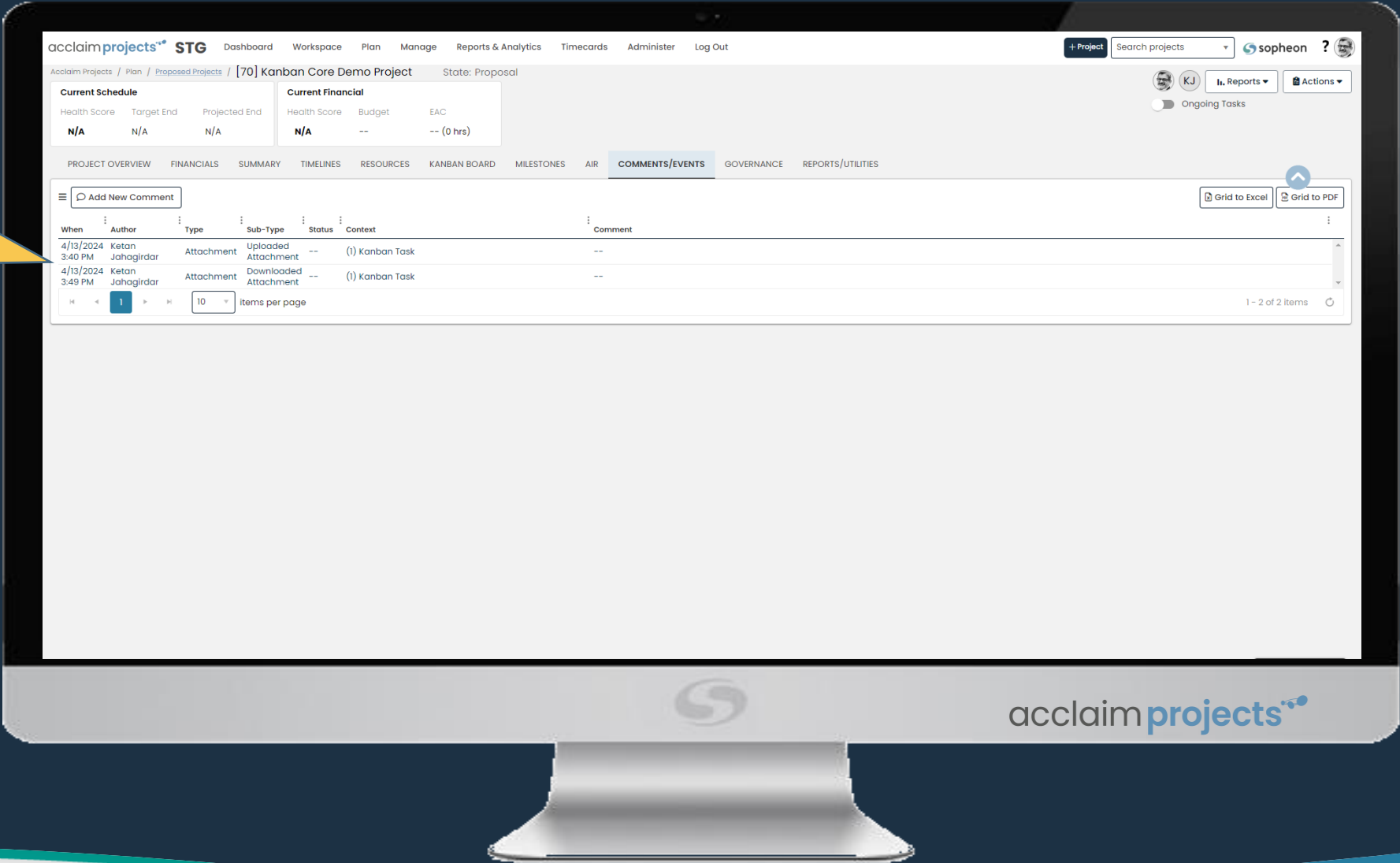
Step 5 – Moving Cards along the workflow

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 :

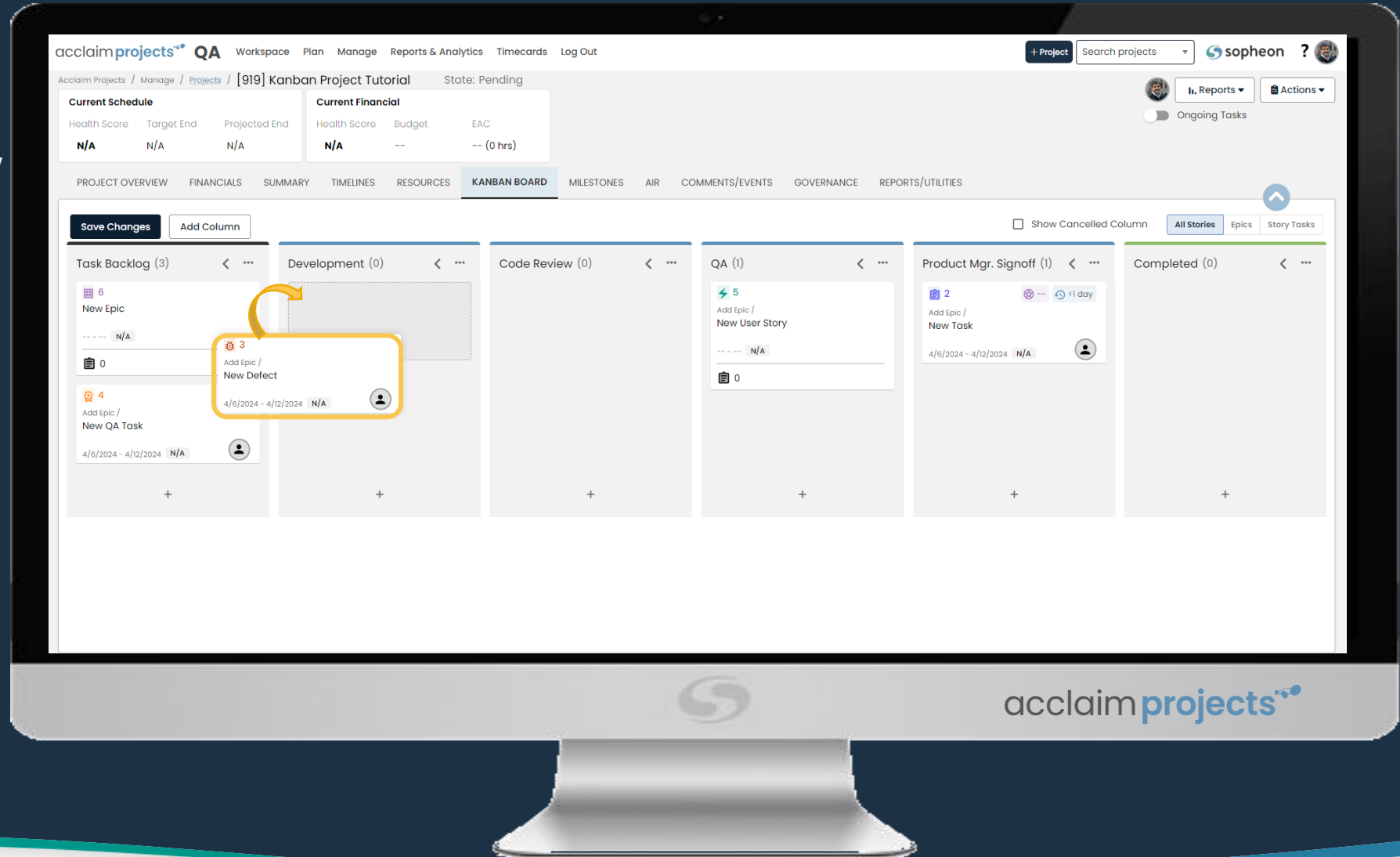1. If the project is in Proposed/Submitted state, cards are restricted to the Backlog
2. Cards can be in the Inflight Sub-states only if the Project is In-Flight/Pending
3. When a project is Cancelled, all non-completed cards are cancelled

Step 6 – Tracking Time and Dollars Spent

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

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.

1 Just Make sure that the Tracking Mode is set to **"EZ"** 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

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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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Managing Financials
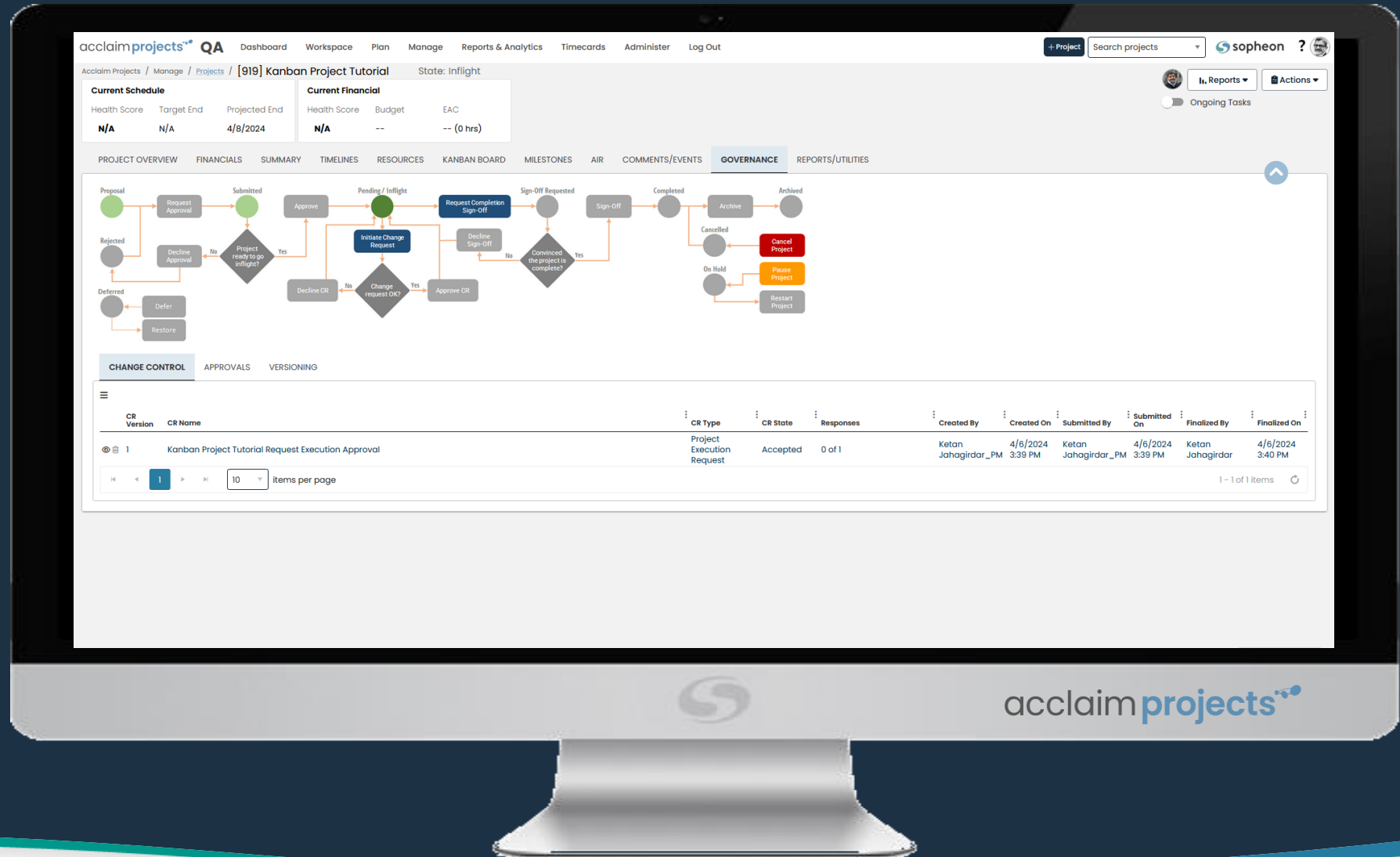
# Step 8 - Managing Financials in Kanban

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.
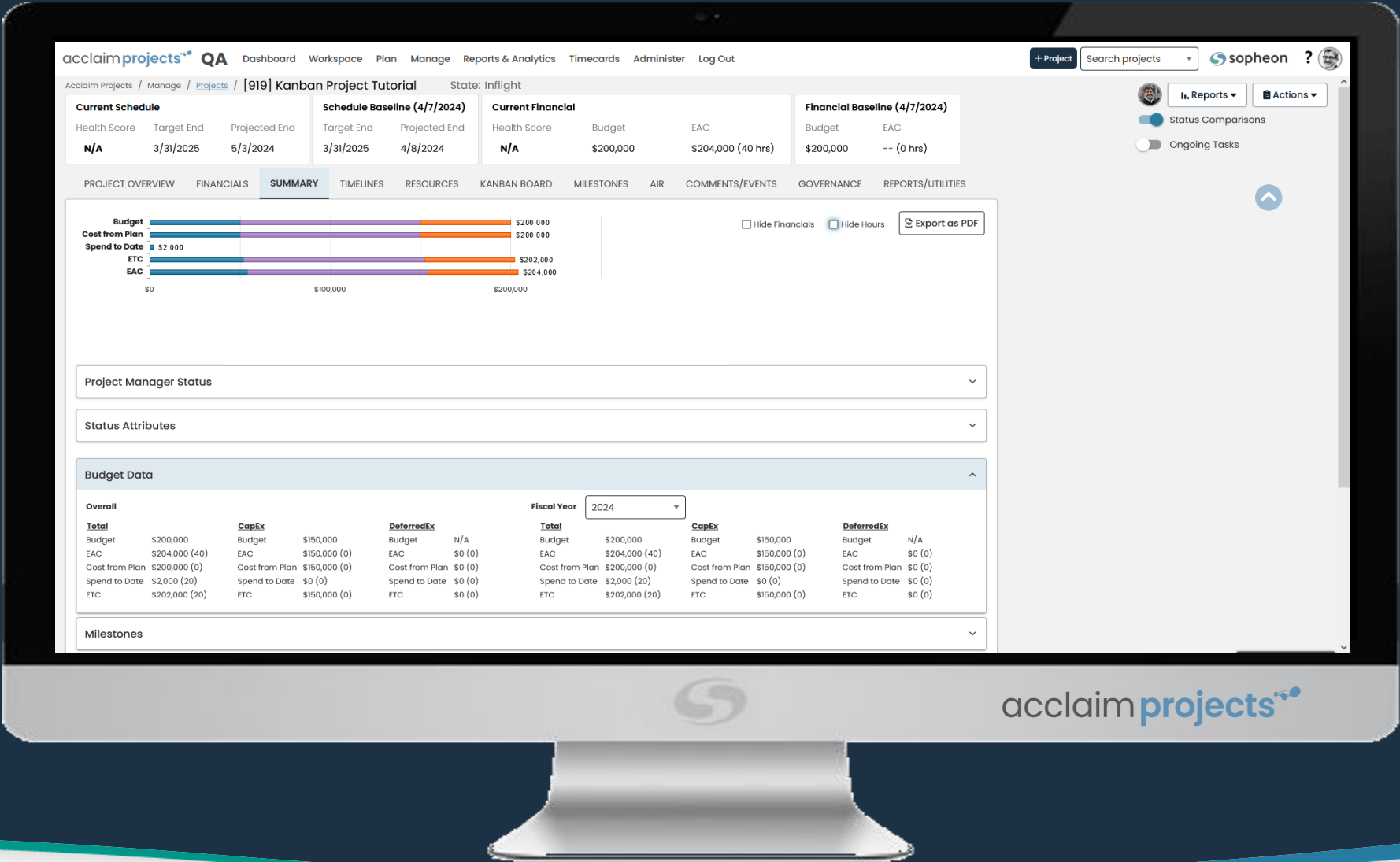
Thank you

For your attention

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