Lucent Technologies
Bell Labs Innovations

Process Management Architecture (PMA)



External Accelerate Standard Training Exercises

Version 1.0

October 2002

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Introduction

Overview:

Accelerate, a software tool developed by MS2, is the tool that enables collaboration between internal and external teams. It allows the teams to be efficient and effective through collaboration.

By completing this training, the end user will walk away with:

- An understanding of the basic functionalities of the Accelerate tool
- The ability to manage issues, risks, and action items & their respective statuses.
- Ability to create real-time, customizable reports available.
- Where to go for questions or help with Accelerate

Upon your completion of this training material you will be expected to do the following:

- Utilize Accelerate for collaboration.
- Keep your information in the tool current.
- Provide feedback on the tool to acceleratesupt@lucent.com.

Training Purpose & Format:

This training is based upon the most commonly performed tasks that new users will need to understand. The exercises were developed to teach the basic functionality of the Accelerate tool.

The format used for this material is a combination of screen shots and detailed instructions for each exercise. The intent was to make the training easy to follow and user friendly, in an effort to help the end user gain a thorough understanding of the material. This training is designed to be used as a point of reference now and in the future. Each exercise listed below is hyperlinked to the corresponding page, so that users can quickly find answers to questions.

Objective: To provide instruction on the following:

Exercise 1: Login to Accelerate..... 3
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Exercise 1: Login to Accelerate

1. To access Accelerate, go to https://pmacollaborate.lucent.com where you will be prompted to login.
2. In the username field, enter the username you were sent in the form of **"Domain\handle"** (e.g. ebizw2kacc1\kdunphy). Enter your password in the password field. You can leave the domain field blank.

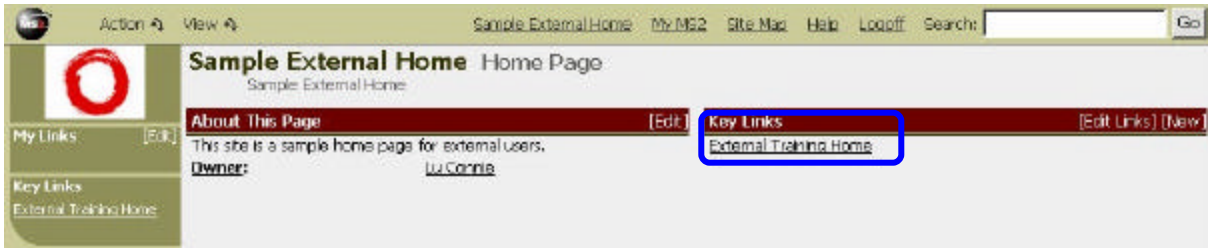


Note: If you have trouble logging in, contact your Accelerate advanced user.

3. Once you're logged in, Accelerate will take you to your home page.



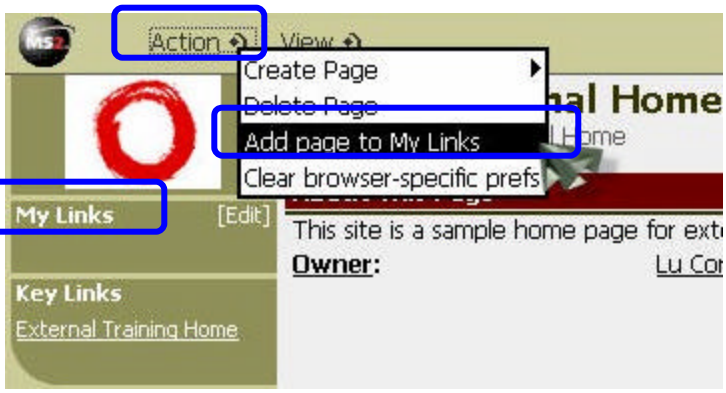
4. From your home page, click on External Training Home under Key Links.



5. To create a shortcut to this training page, click on **[Action]** and select **"Add page to My Links"**.

   In your **My Links** section (upper left side), you should see a link appear for External Training Home

   Note: The advantage of keeping your Accelerate links in the **"My Links"** area is that they are available for you no matter where you access Accelerate.



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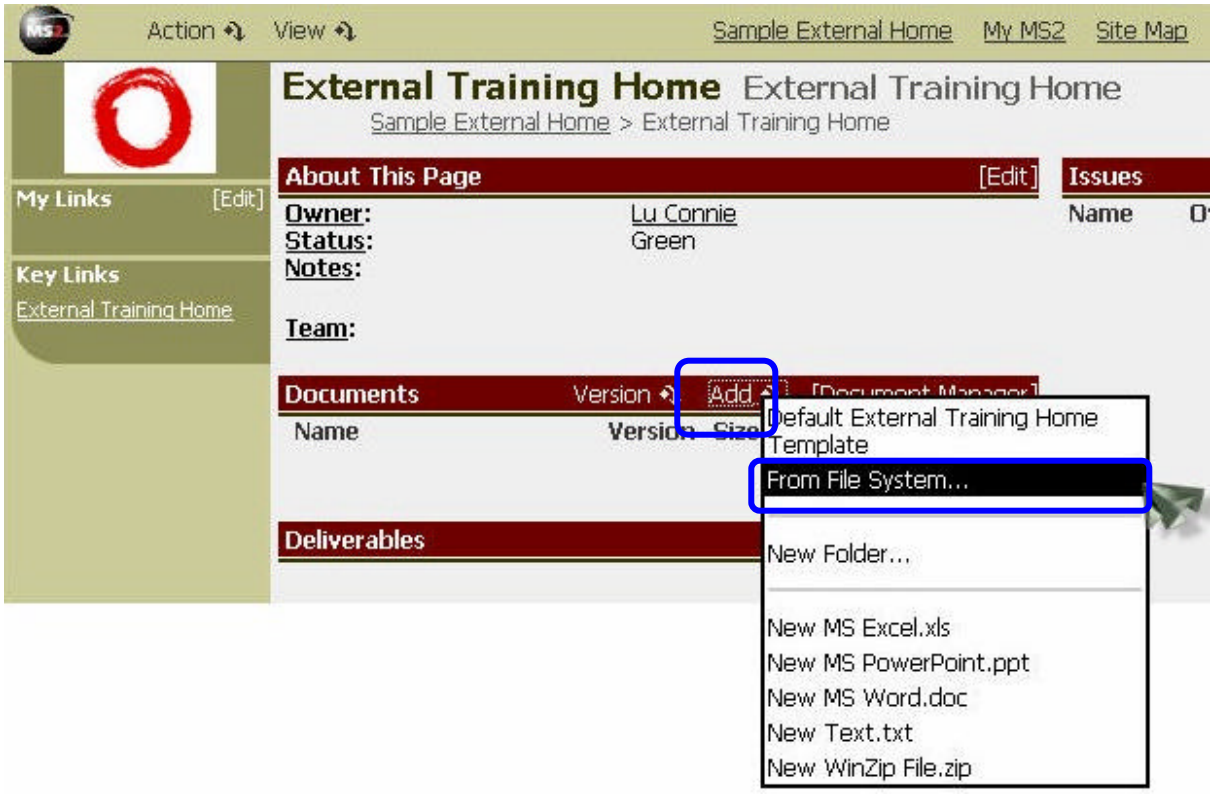
Exercise 2: Downloading Accelerate Helper

The first time you attempt to perform any document functions in Accelerate (e.g. adding a document into Accelerate), you will get the Accelerate Helper Installation page. The Accelerate Helper is a **Windows** application that assists your browser in easily managing your documents in Accelerate. It also allows you to use Microsoft Outlook (and your address book entries) to send reviews.

1. On the Documents section of the training page, click on **[Add]** and select **"From File System"**.



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2. Since Accelerate Helper is not installed yet the system will prompt you for installation instructions.

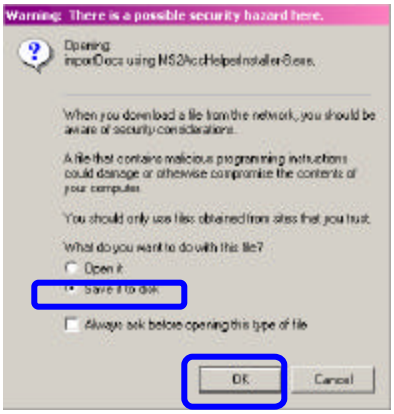


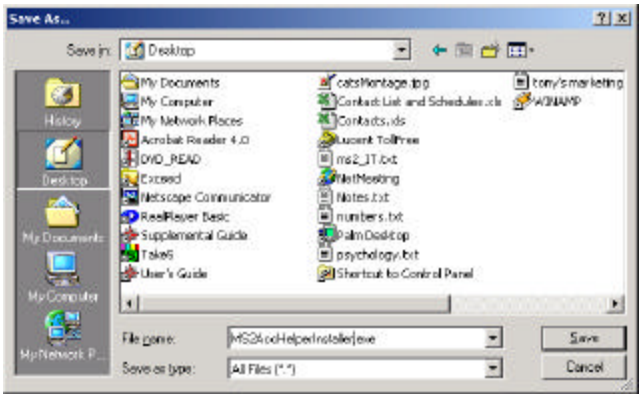
- If you're using UNIX, select the **third** option **"Use browser to view document (UNIX, Macintosh)"** and click **[OK]**. You are now done with this exercise please continue to Exercise 3 on page 10.
- If you're using Windows, click the **first** option **"Install on Microsoft Windows…"** and click **[OK]**. You will then be prompted with a download dialog box.

For Netscape:

a. Select **"Save this program to disk"** and click **[OK]**. You will be prompted with a Save-As dialog box. Save the file as MS2AccHelperInstaller.exe

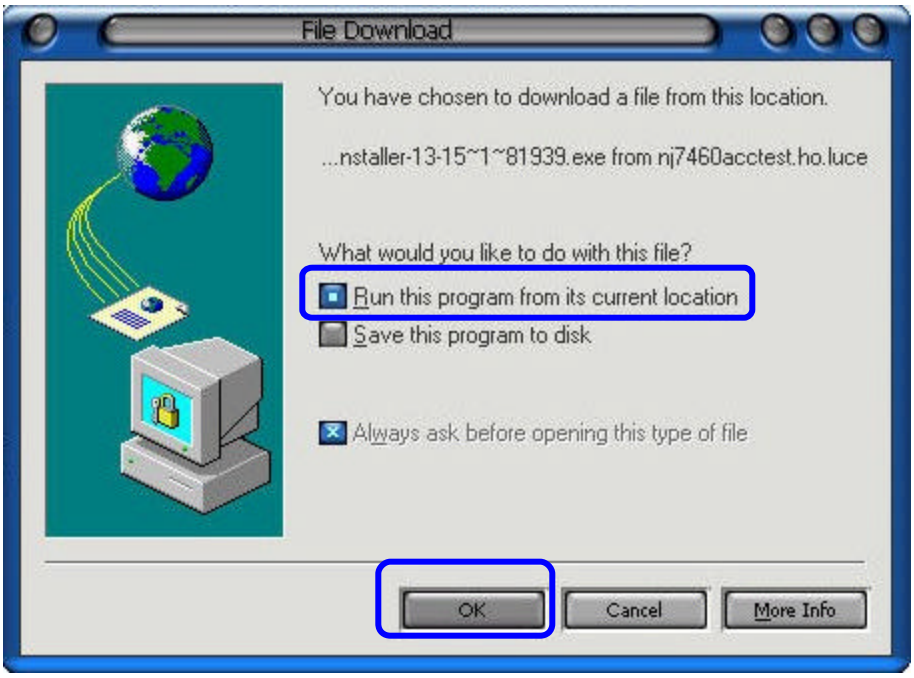
- Double-click on the saved file, *MS2AccHelperInstaller.exe*, to run the installer.
- Please continue to Step B once you have selected the file to run.





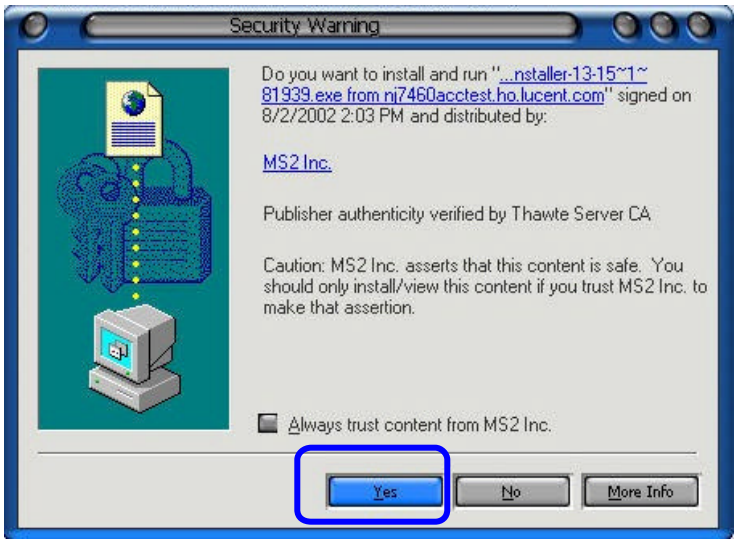
For Internet Explorer:

a. Select **"Run this program from its current location"** from the *File Download* dialog to run the installer. Then click **[OK]**.



The following steps applies to ***both Internet Explorer & Netscape*****:**

b. On the "Security Warning" dialogue box select **[Yes]**.



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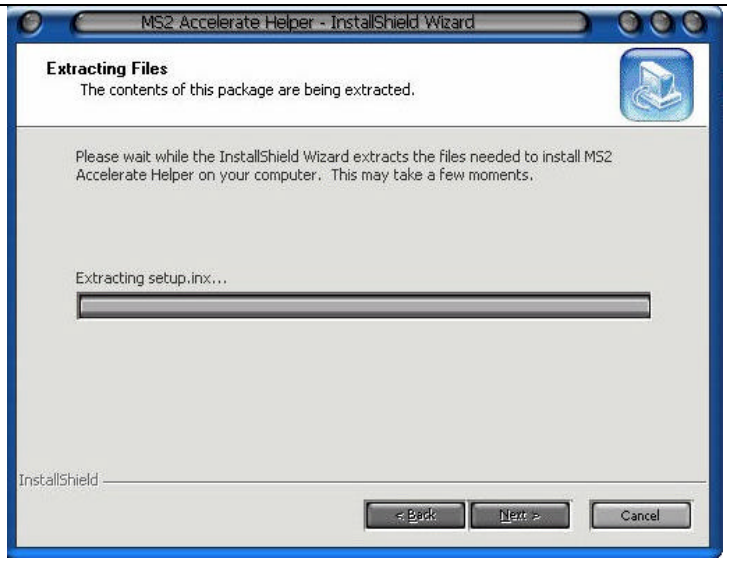
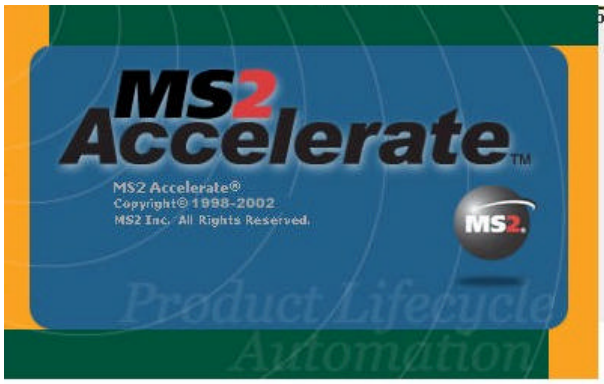
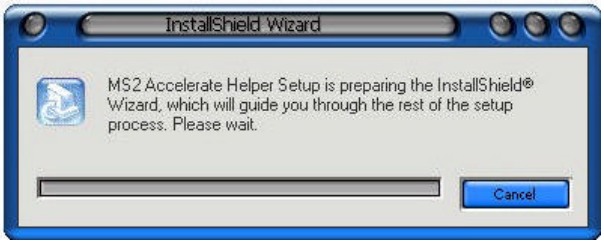
c. Next you will see the "InstallShield Wizard".



d. The "InstallShield Wizard" will prepare to install AccHelper.





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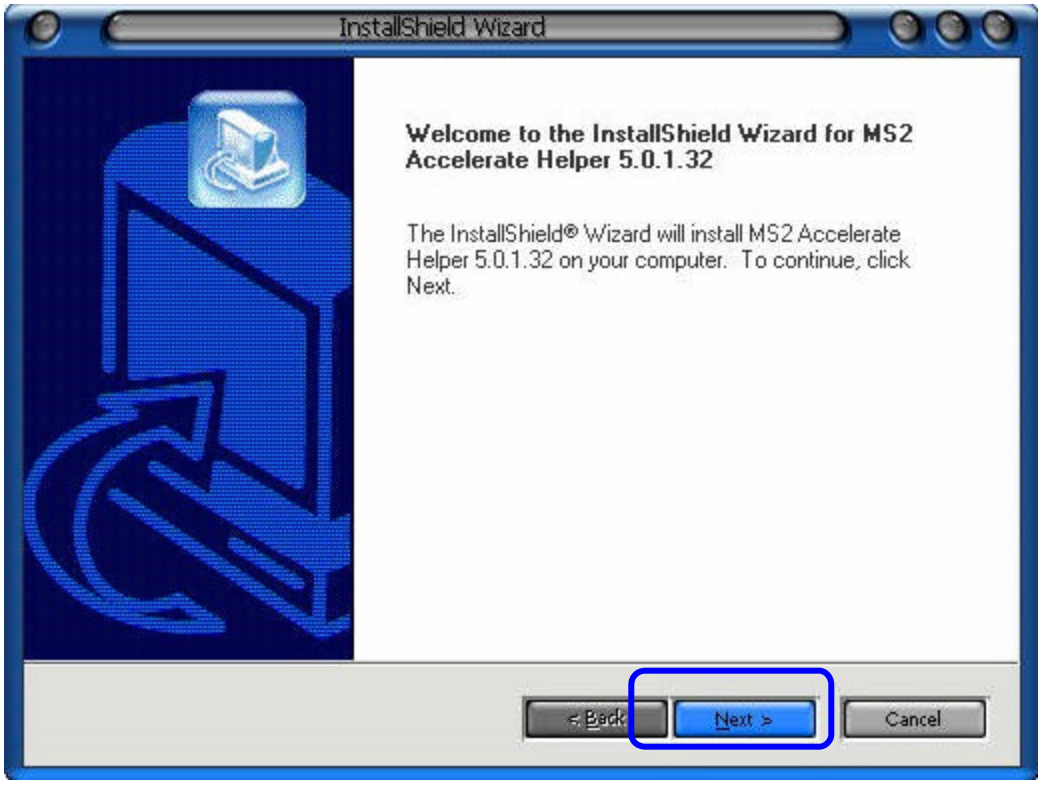
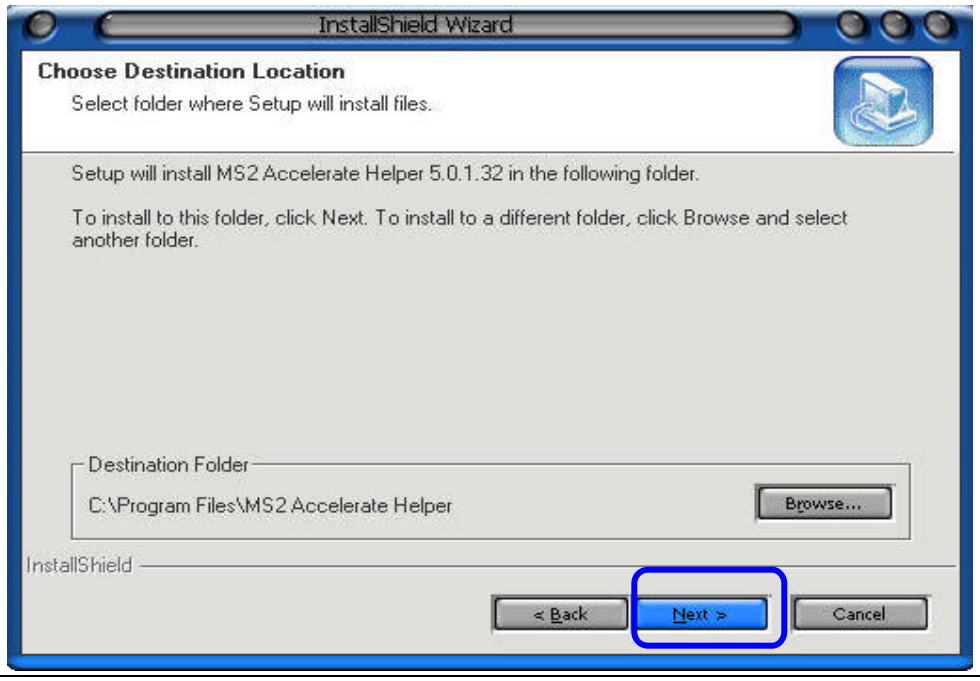
e. Next the “InstallShield Wizard” will install AccHelper.

Choose **[Next]** to launch the installation.



f. “InstallShield Wizard” will point you to where the installation files will be installed.

Choose **[Next]** to launch the installation.



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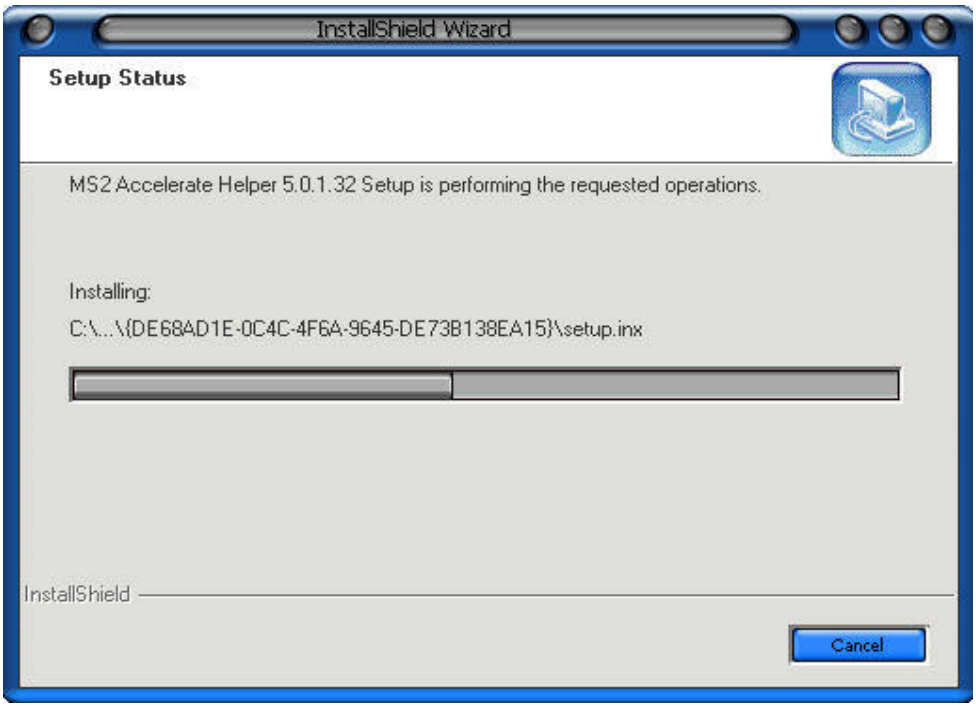
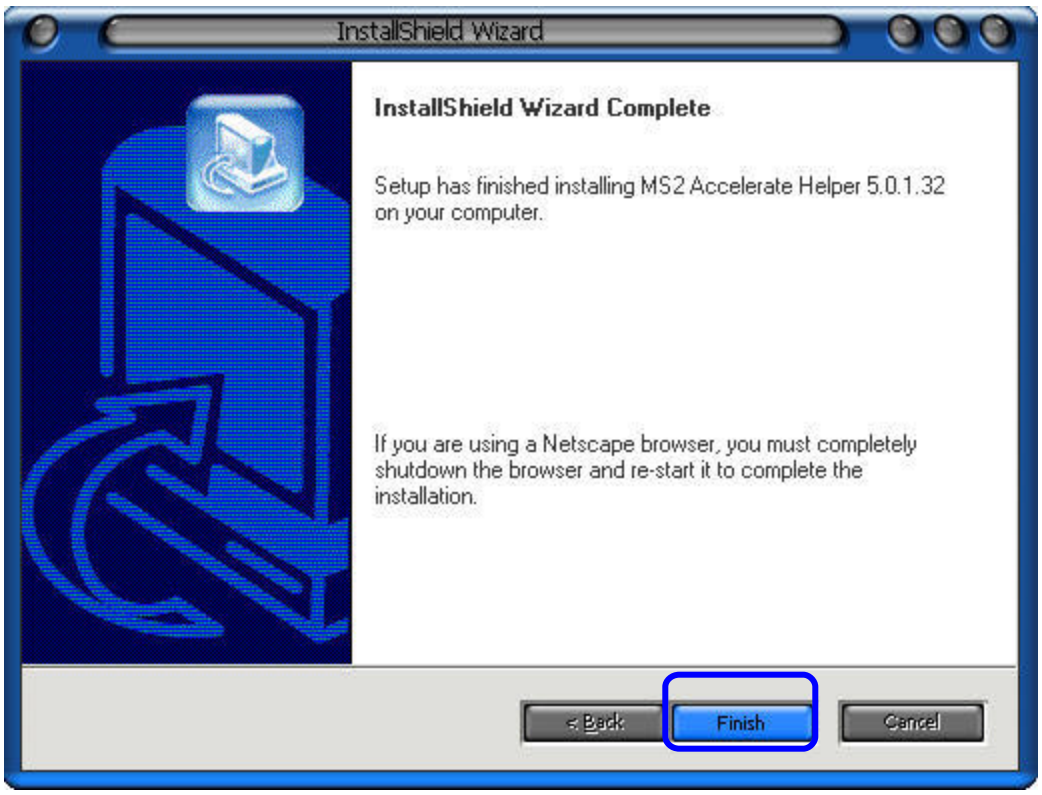
g. AccHelper is now being installed on your system.



h. AccHelper installation is complete.

Click on **[Finish]** to close the dialogue box.



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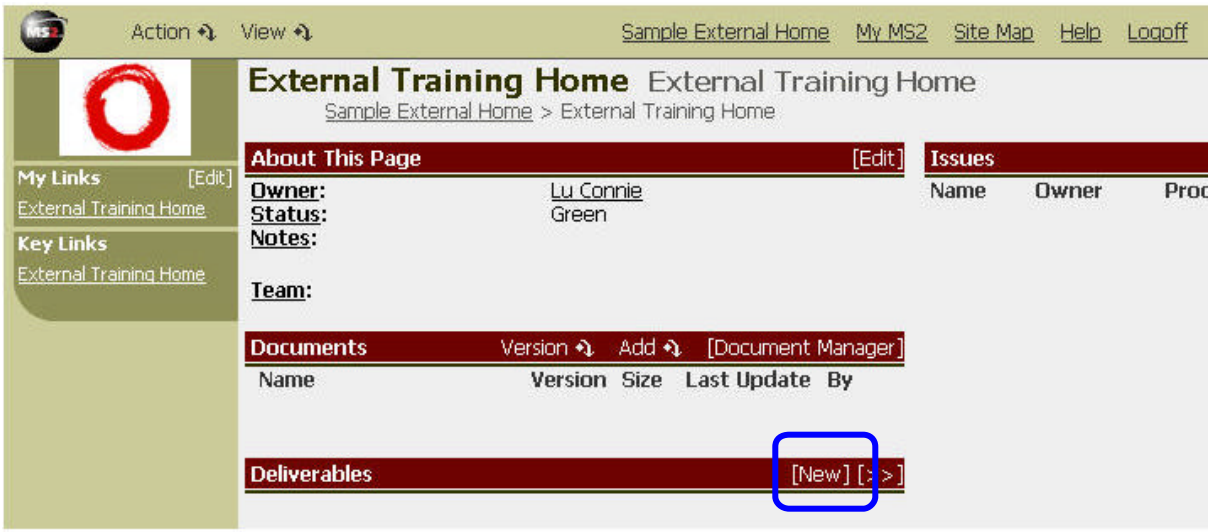
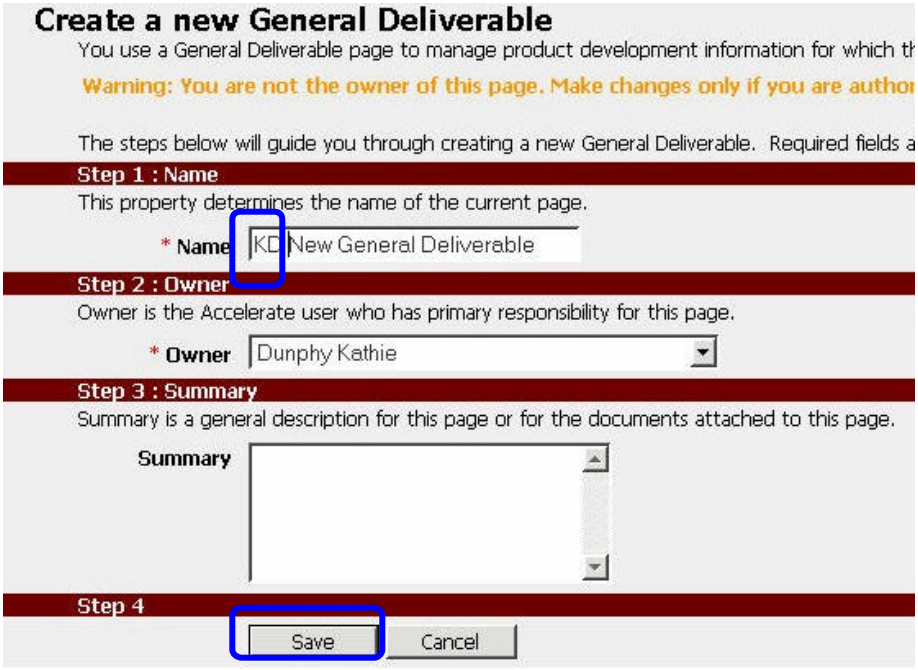
Exercise 3: Create a Deliverable

1. While on the External Training Home, scroll down to the **Deliverables** section and click **[New]**.



2. You will be brought to a **Create a New General Deliverable** Page.

b. **For Training Purposes:** To make this name unique, put your initials in front of the name and click **[Save]**. This will bring you into your newly created **General Deliverable.**



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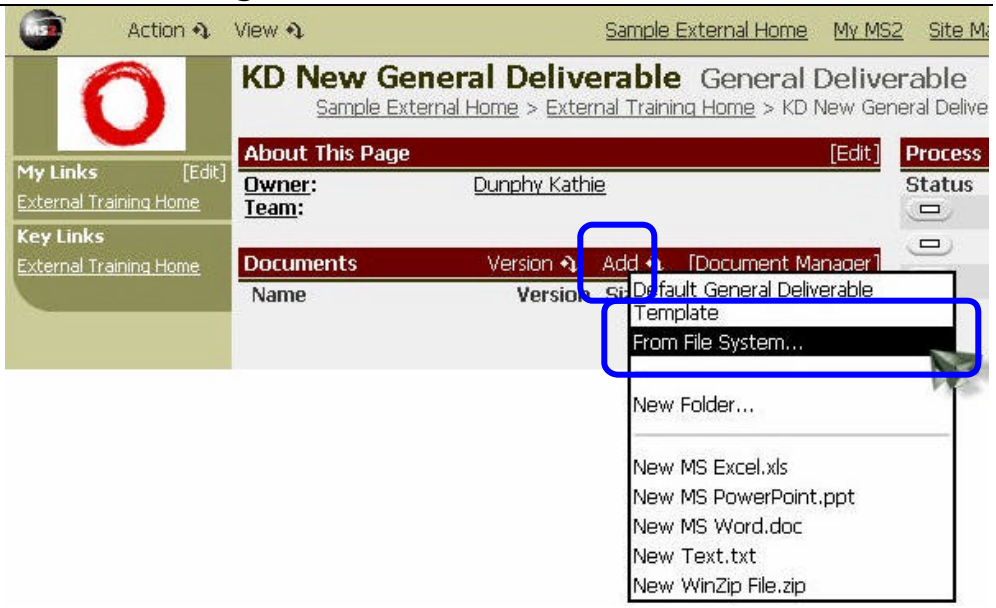
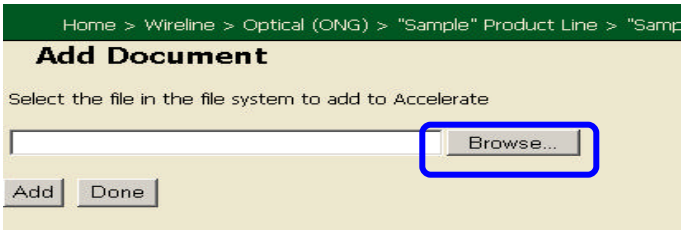
c. Click on **[Add]** and select **"From File System"** in the Documents section to add a sample document from your local hard drive into Accelerate.



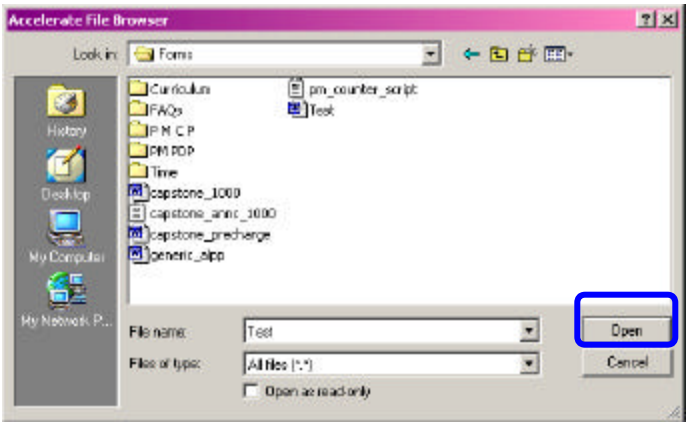
UNIX Users:

1. You will be brought to an Add Document page where you can use the **[Browse]** button to find the document to add.



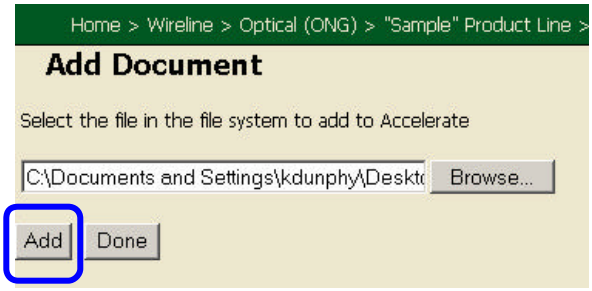
UNIX Users:

2. An Accelerate File Browser box will pop up where you can browse and find the intended file to add. Click on the filename and click **[Open]**.



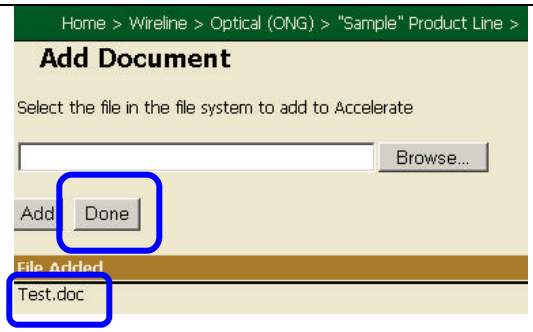
UNIX Users:

3. After you hit the "Open" button in the dialogue box above you will see the file in the "Browse Window". Click the **[Add]** button to store it in Accelerate.



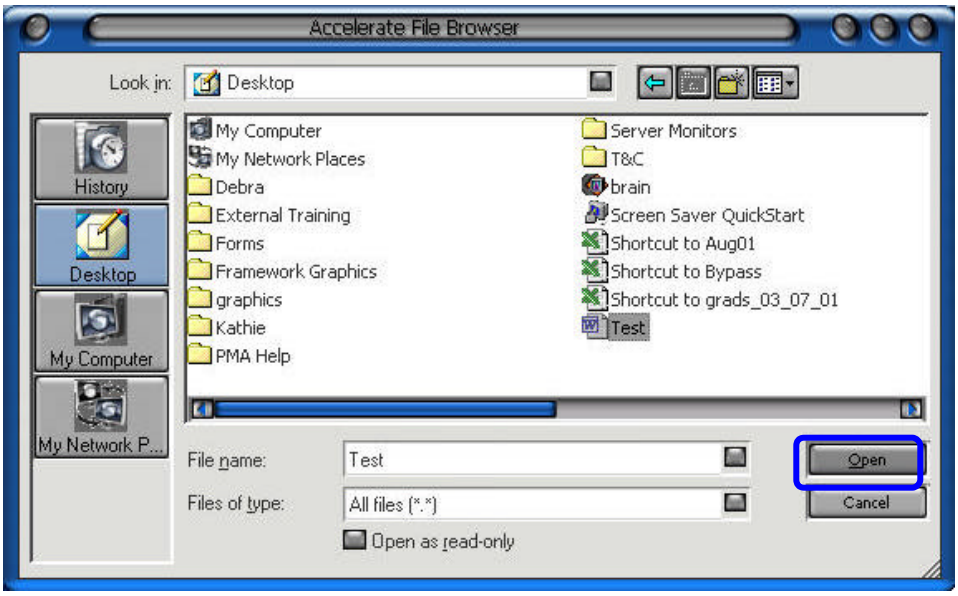
UNIX Users:

4. Once the filename shows up under the "Add" button, click **[Done]** to return to the Models Plan page.

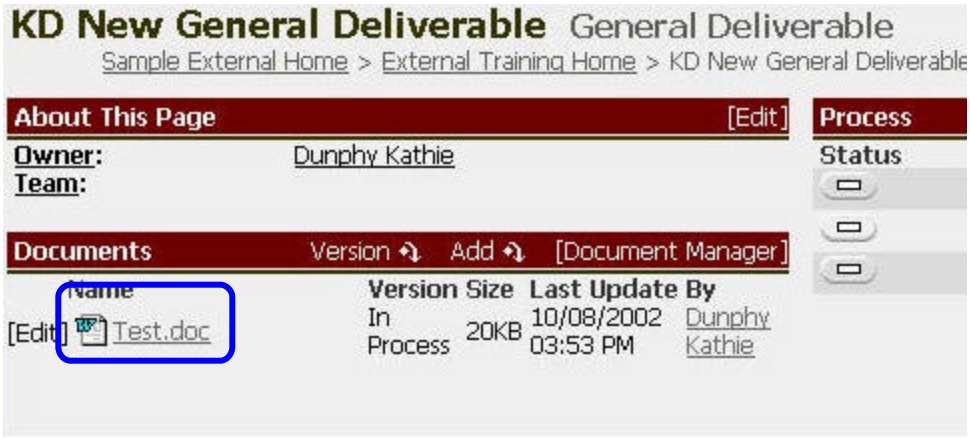


Windows Users:

1. An Accelerate File Browser box will pop up where you can browse and find the intended file to add. Click on the filename and click **[Open]**.



d. Accelerate will refresh the page and your newly added document will show up in the documents section. Should this not happen just click on refresh in your browser.



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Exercise 4: Document Versioning

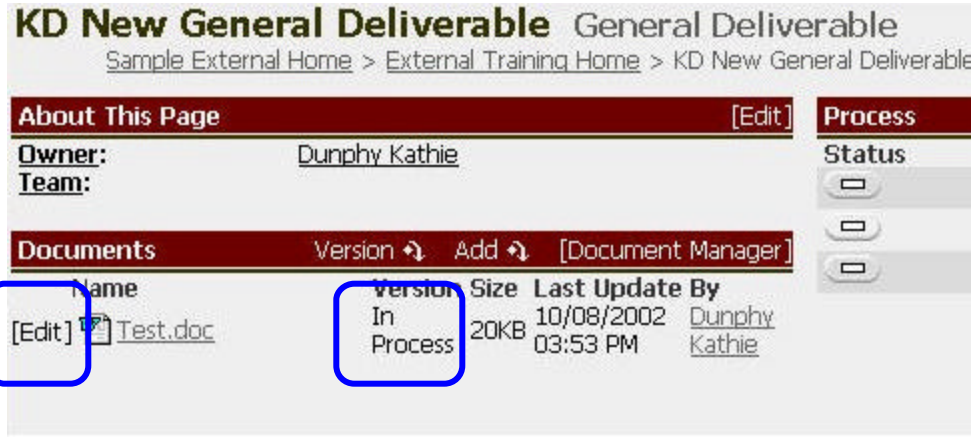
In this exercise, we'll see how Accelerate will help you manage your documents and keep backup copies for historical changes. Files in Accelerate can be in 2 versions*: In Process* and *Baselined*.

In Process: Document is being drafted and might only be visible to the author or authors

Baselined: Draft is completed and the document is ready to be viewed by a wider audience

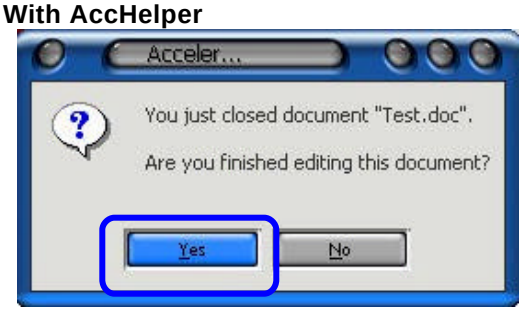
1. From your deliverable page, click the **[Edit]** button next to your document. If you have Accelerate Helper installed, the document will open in the native application. Otherwise, it will open up in a browser window. Notice that the document version is "*In Process*."

(**Note**: By default, when you add a new document to Accelerate, the document version will be *In Process*.)

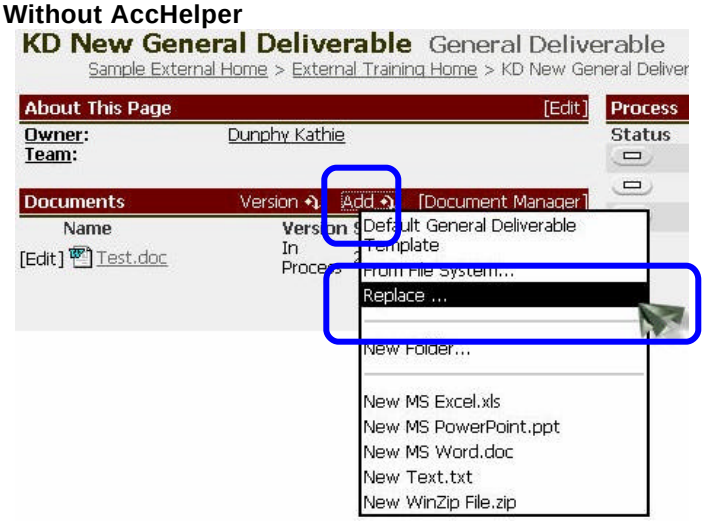


2. Make your changes and save your document, then exit the application (in this example, close MS Word.) If you have Accelerate Helper installed, you'll receive a pop-up box asking if you are finished editing the document, click **[Yes]**. Otherwise, click on Add→ Replace in the document header bar in Accelerate to put your edited document back into the system.

With AccHelper



Without AccHelper



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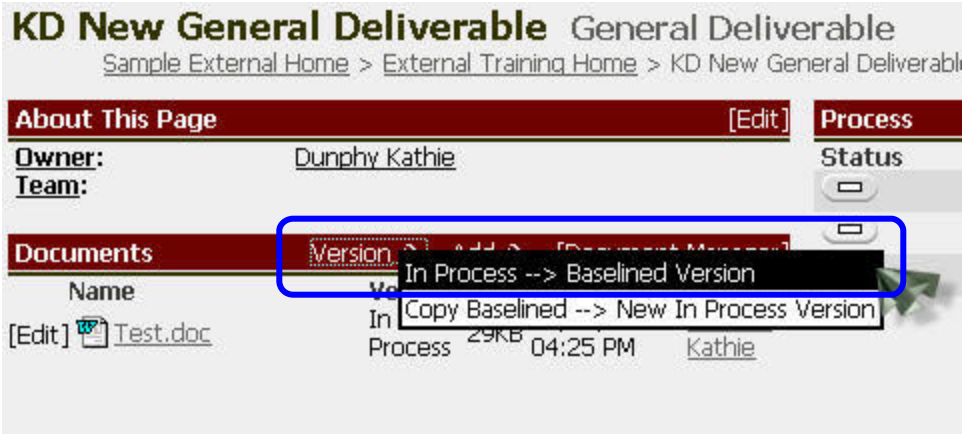
3. Every time you end an edit session or put a document back into Accelerate, Accelerate will store the modified copy in the Recent Backups folder.

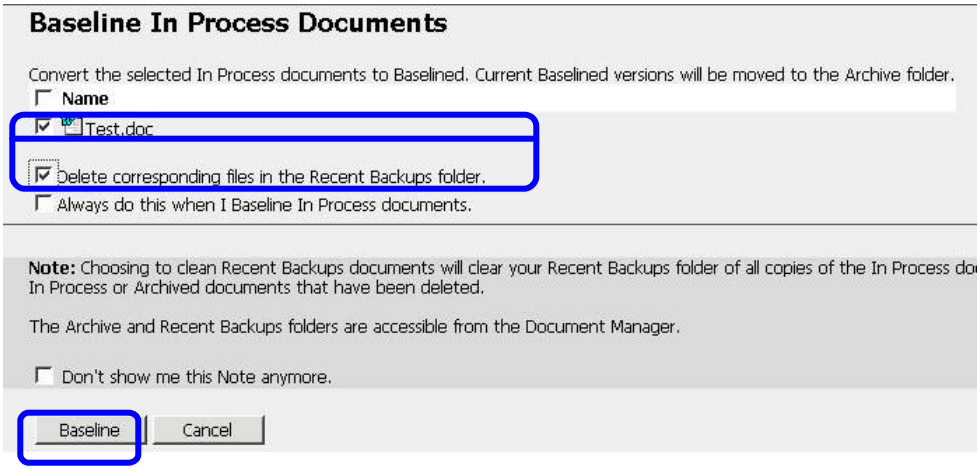
   Note: You will **not** be able to view the copies stored in the Recent Backups folder because it resides on a different server. If you need a recent version of your document, you can ask your Lucent counterpart to retrieve the document from the Recent Backups folder and email it to you.

4. In the document header bar, click on the **[Version]** button and select **"In Process → Baselined Version"** to baseline your document.



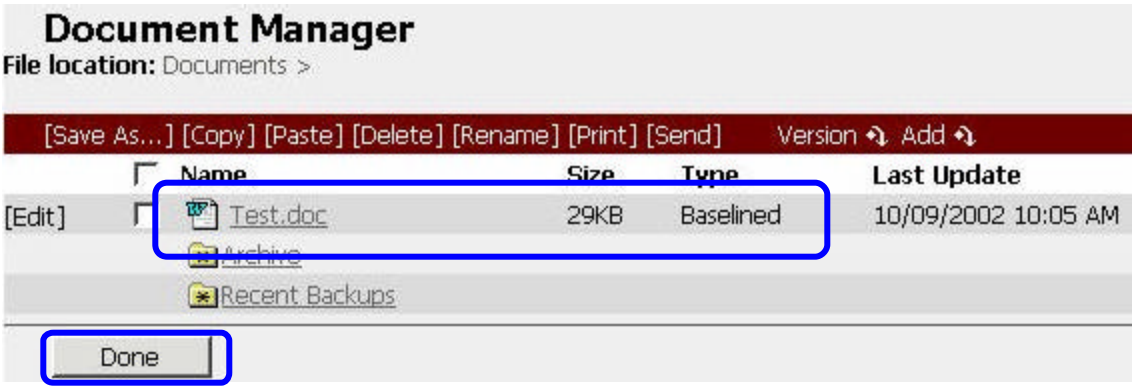
5. If you have more than one document on your page, (this page automatically pops up when you baseline. You can pick the doc(s) at this point) you can choose to only Baseline that specific document by checking the box next to it.

   Note: The default is to "Delete corresponding files in the Recent Backup folder". If you do not want this to happen **UNCHECK** the box.

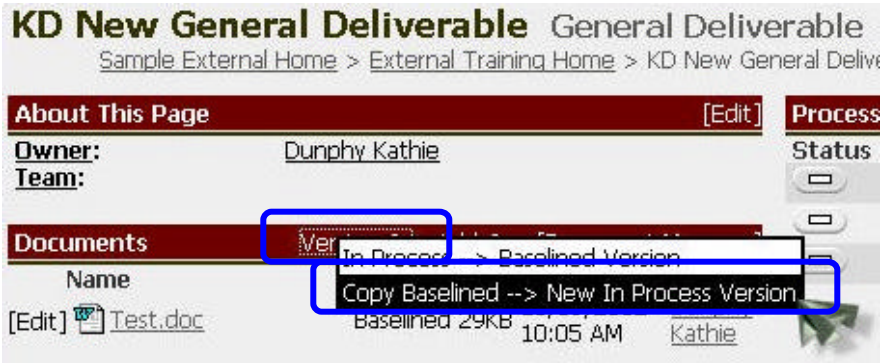


6. Notice that your document version has changed from "In Process" to "Baselined". As you create additional Baseline copies of your document, Accelerate automatically files the older copies in a folder called Archive. Currently, your Archive folder is empty. It will stay that way until you "Baseline" another copy of your document.

   Note: You will **not** be able to view the copies stored in the Archive folder because it resides on a different server. If you need a previously baselined version of your document, you can ask your Lucent counterpart to retrieve the document from the Archive folder and email it to you.

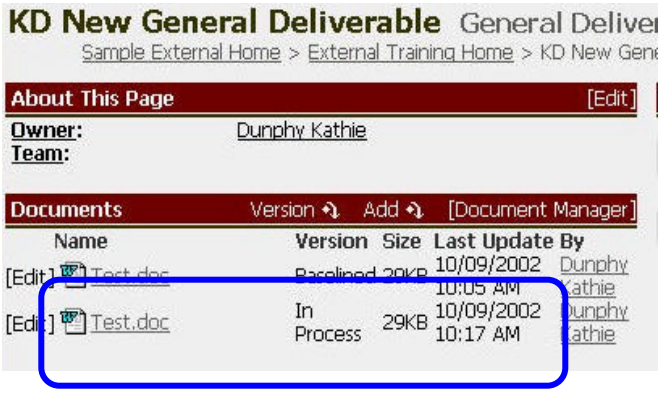


7. After a document review (see Exercise 7), you may have received some feedback on your document and need to make some changes. Click on the **[Version]** button in the **"Documents"** section header and select **"Copy Baselined → New In Process Version"**.



8. Your "Baselined" copy will remain for others to read and you've now created another working copy of your document to make any needed changes. The "In Process" copy is placed in the Recent Backups folder and the process starts again.

9. Once you have "Baselined" your current "In Process" document, by following steps 4 – 8 above, you'll only see your latest document on the page. Your previously "Baselined" document will be moved to the Archive folder.



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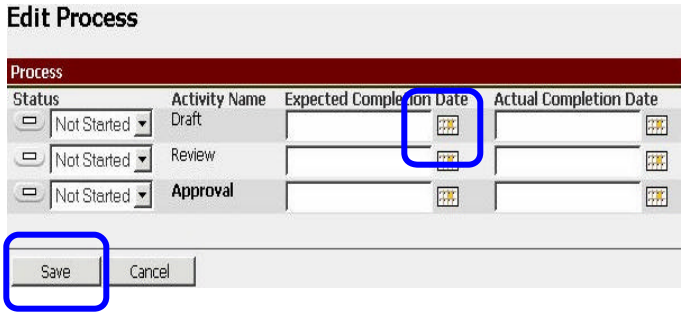
Exercise 5: Enter Expected Dates

1. On the upper right hand side of your deliverable page, there is a Process section that contains the steps to approve the document. To set the Expected dates for each process step, click on **[Process Manager]** in the Process section header.



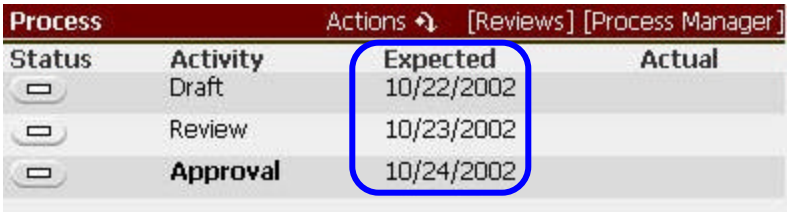
2. On the Process Manager page, click on the calendar icon to the right of each expected completion date field and select the expected completion dates.

3. Click on **[Save]** to return to the deliverable page





4. You will now see your updated Expected dates in the process section.



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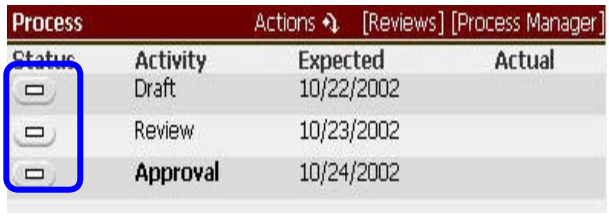
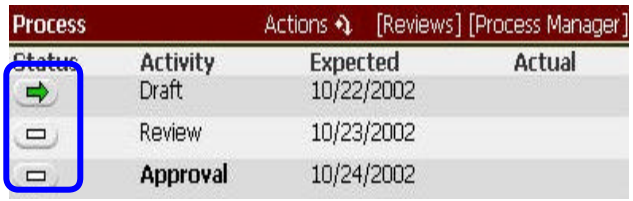
Exercise 6: Modify a Process Status

1. On the upper right hand side of your deliverable page, there is a Process section that shows the status of the document. To change the status of the document to Draft, click on the bar next to **"Draft"** and the page will refresh and display a green arrow next to it.

Before



After

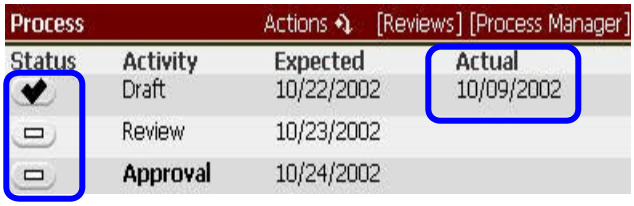


2. Click on the **[green arrow]** and the icon will change to a check mark to indicate the Draft has been completed. Note that the Actual date was filled in with today's date.

Before



After



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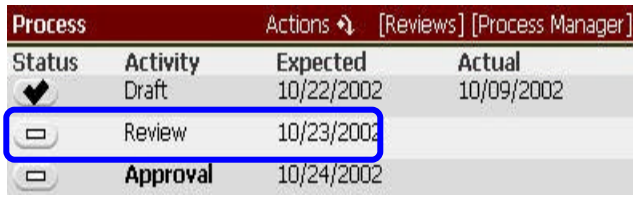
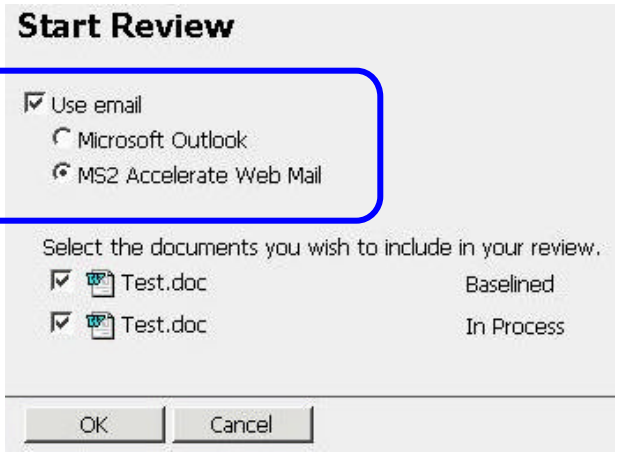
Exercise 7: Start a Document Review

Accelerate provides a review functionality that will send e-mail to reviewers and collect all the responses in one place for easy reference and tracking purposes.

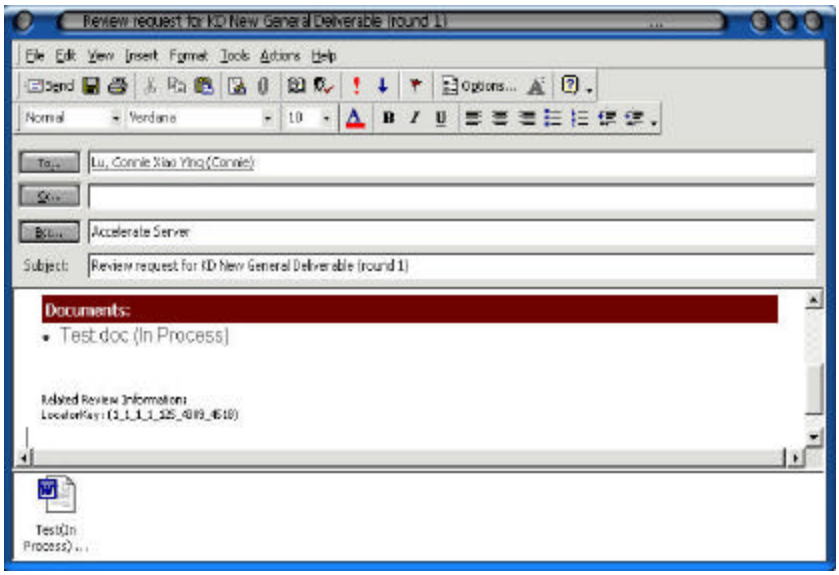
1. To start a review, all you need to do is start the Review step by clicking on the bar next to the word **"Review"**.



2. Accelerate will prompt to see if you want to send the review e-mail through Outlook or Accelerate Web Mail. It also enables attachment of documents on the page to the e-mail.



a. If you select **"Use Microsoft Outlook"**, an Outlook email template will be displayed.



Note: You must have already installed the Accelerate Helper in order to use this option.

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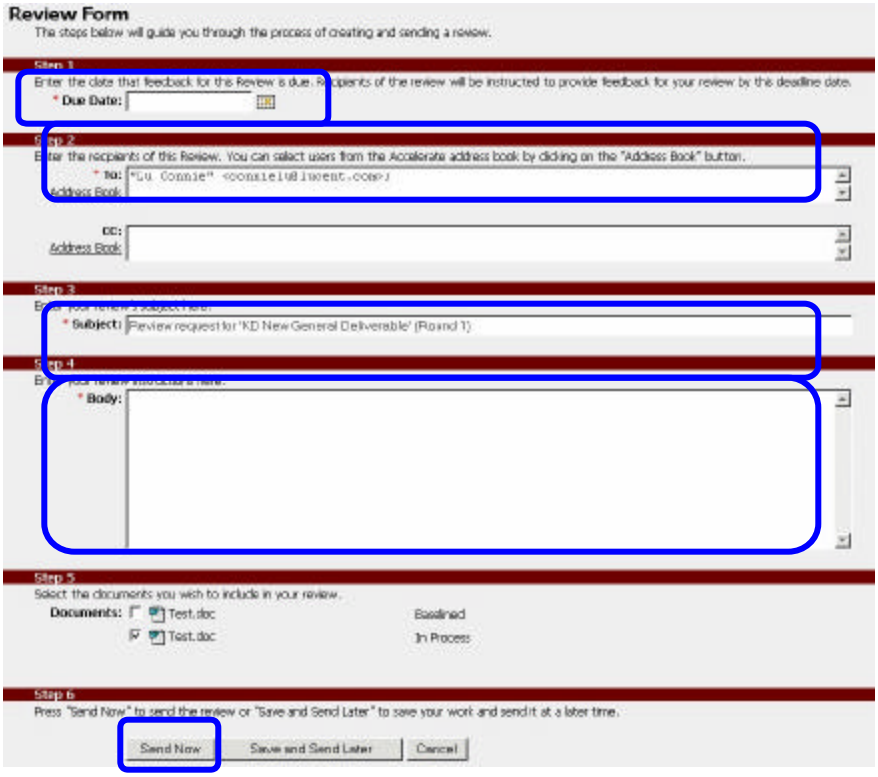
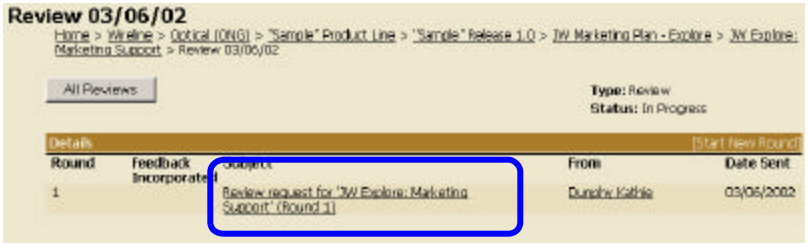
b. If you select **"Use MS2 Accelerate Web Mail"**, a Review Form page will be displayed. Fill in the appropriate fields and click **[Send Now]**.



3. You will receive feedback from those reviewing your document in your e-mail inbox, with a link back to the corresponding page in Accelerate. All review feedback is stored in Accelerate for your future reference. To view those review feedbacks, click on the **[Reviews]** link in the Process section header.



4. On the Review page, click on any subject header to view the individual feedback.



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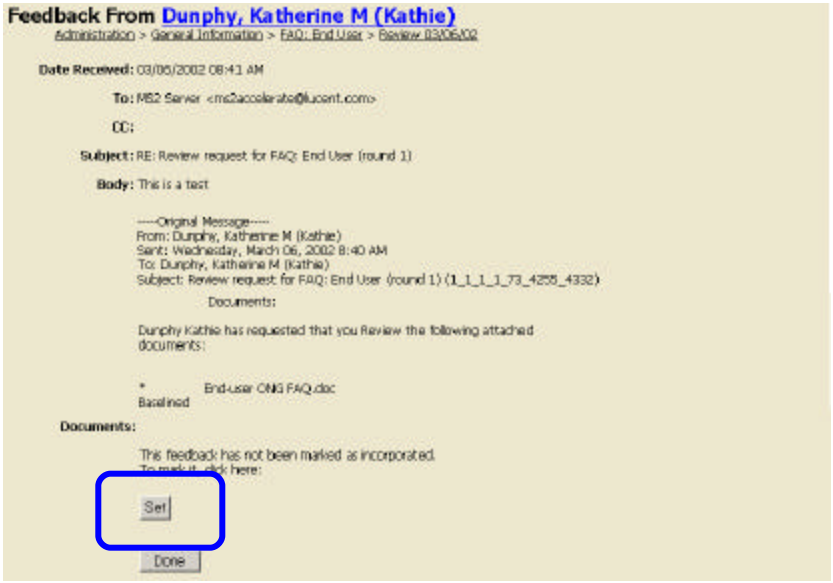
5. Click **[Set]** on the feedback page to indicate the feedback has been read. You will then be brought back to the Review page.



6. Back on the Review page, the Feedback Read column for the subject header you read will say Yes.

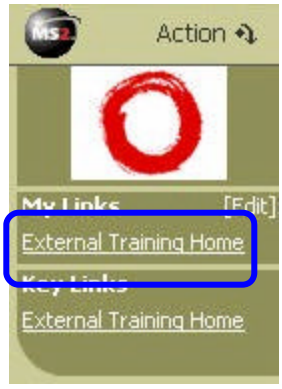


NOTE: When responding to a Review:

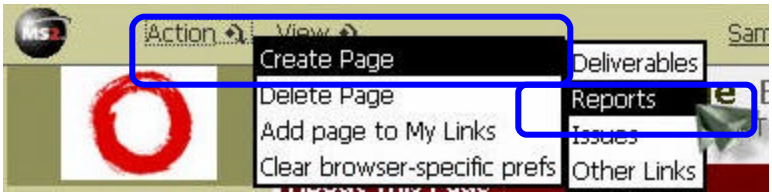
- There is an identifier number that should NOT be removed in the subject line.
- Always do a Reply (not Forward) so that the *Accelerate Server* is included. This will ensure that the review comments will be stored in Accelerate.

Exercise 8: Create a "My Deliverables" Report

1. To create a report of all the deliverables that you own under the External Training Home, first return to the home page by clicking on the **"External Training Home"** link under My Links.



2. Then click on **[Action]** in the top left hand corner of the page and select **"Create Page"** and then select **"Reports"**.



3. Check **"My Deliverables"** and click **[Create]** to create a My Deliverables Report.



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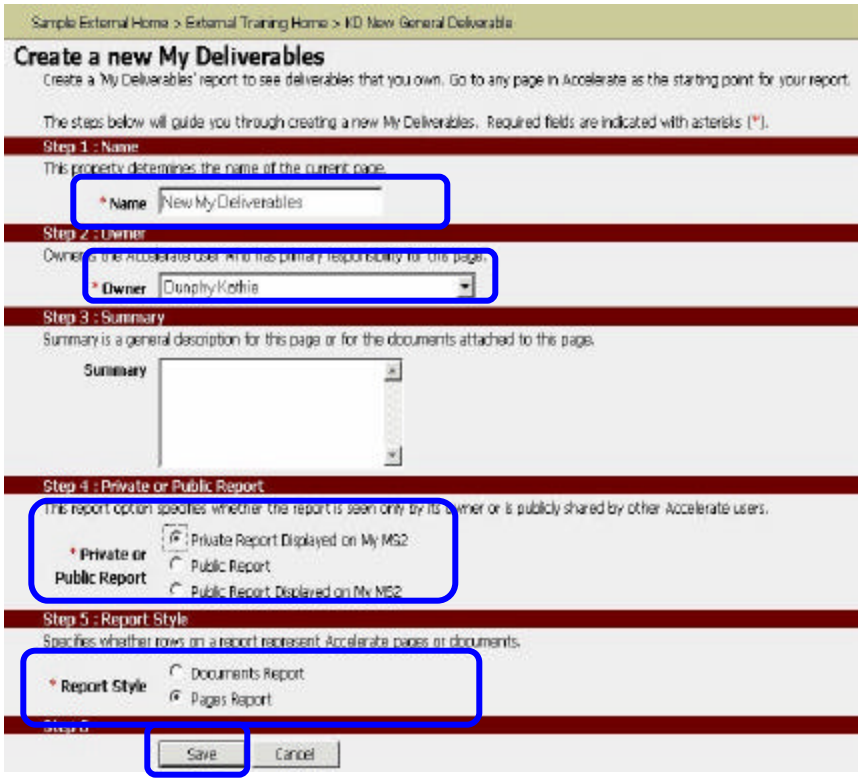
4. On the **"Create a new My Deliverables"** page, fill in all the mandatory fields (fields with a * in front).

   a. Name –put your initials in the front of the default name for uniqueness during training

   b. Owner – the default owner is you

   c. Private or Public Report – select "Private Report Displayed on My MS2" (this report can only be seen by you).

   d. Report Style – leave Pages Report selected.

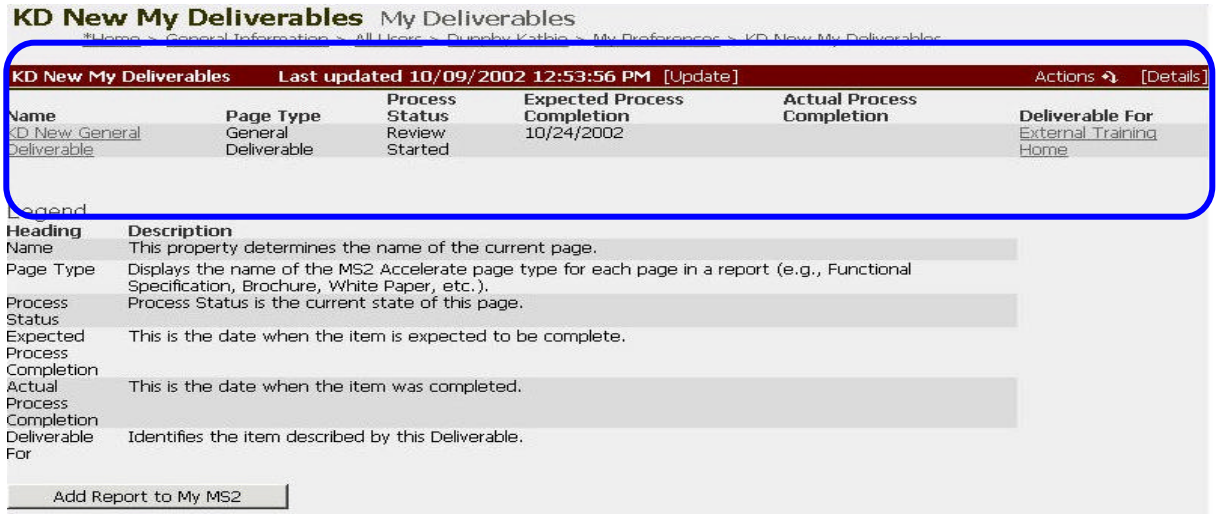


5. Click on **[Update]** to generate the report.

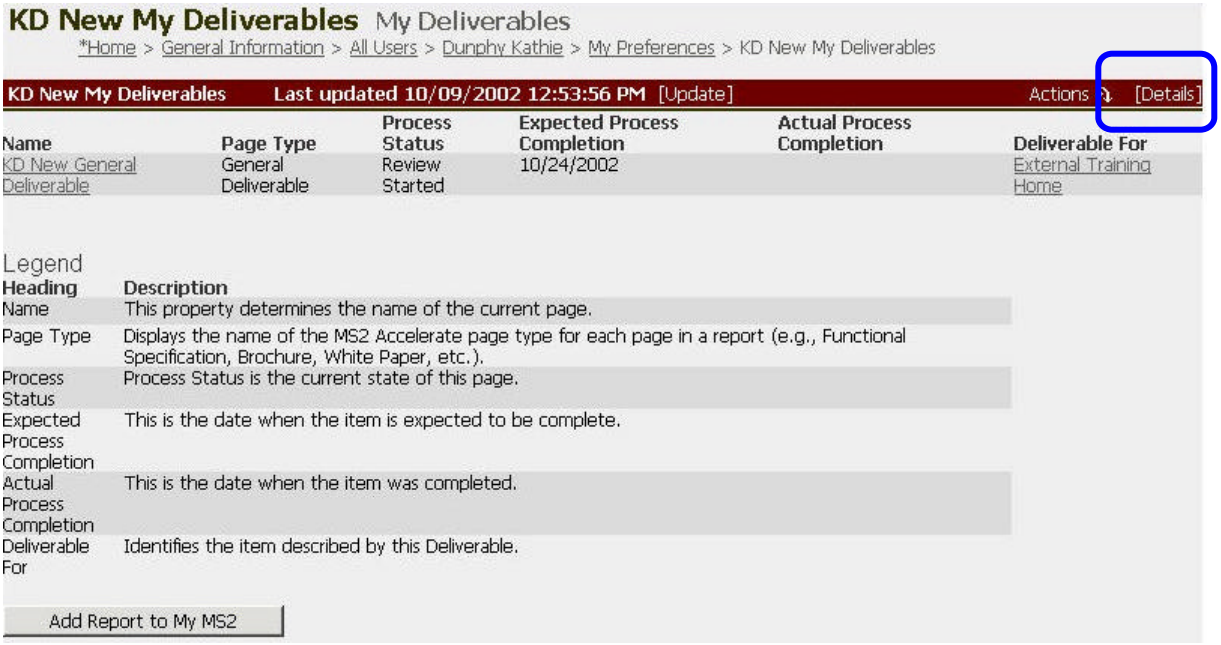
Before:



After:



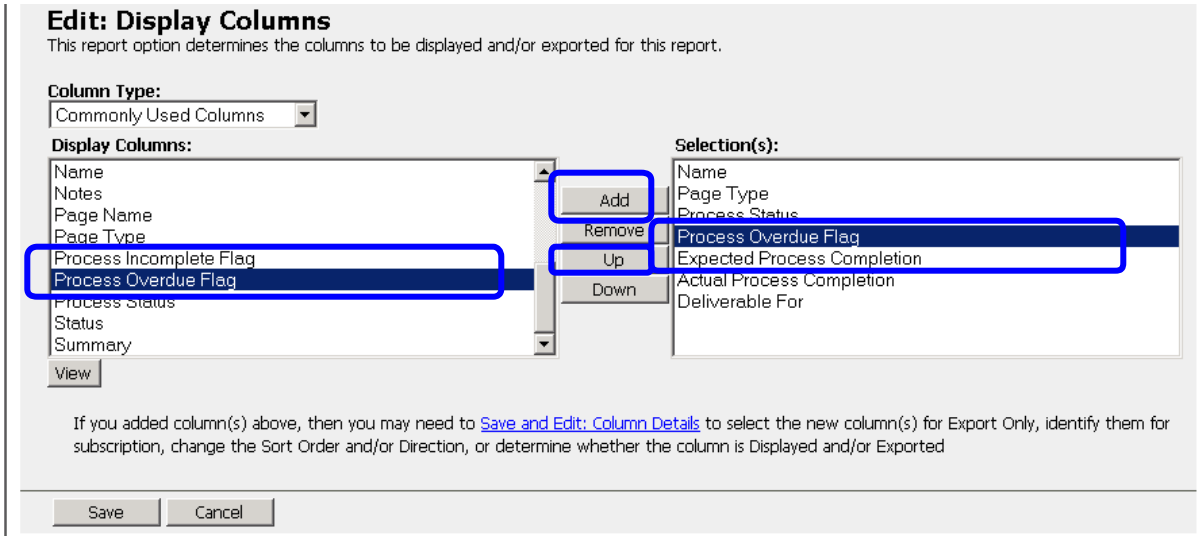
3. Click on **[Details]** in the header bar to edit the report columns for this report.



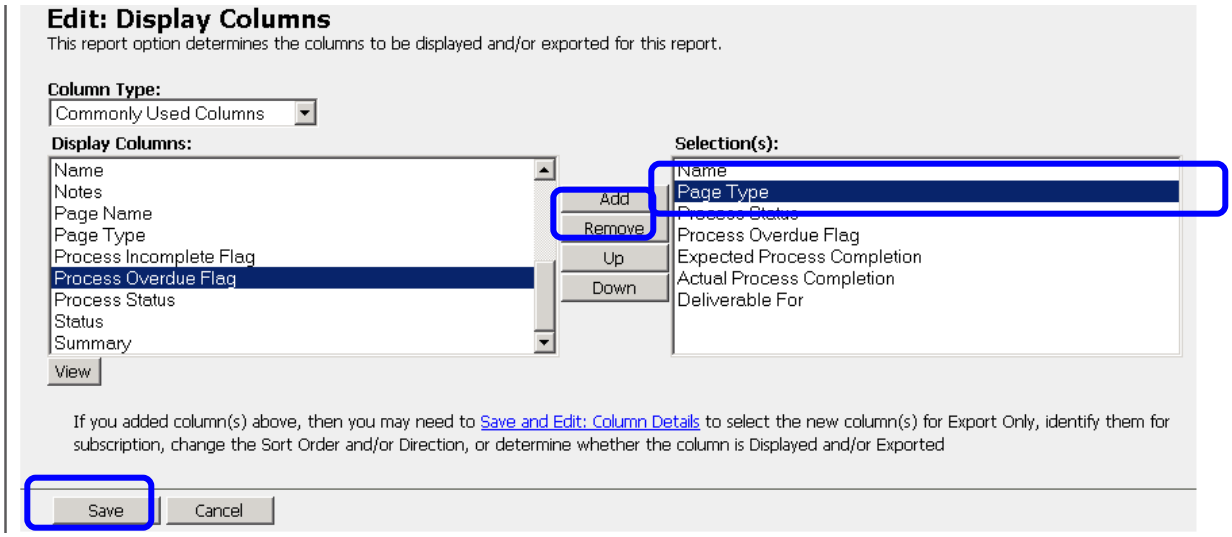
4. On the report details page, click on **[Add/Remove Columns]** to tailor the report to your needs.



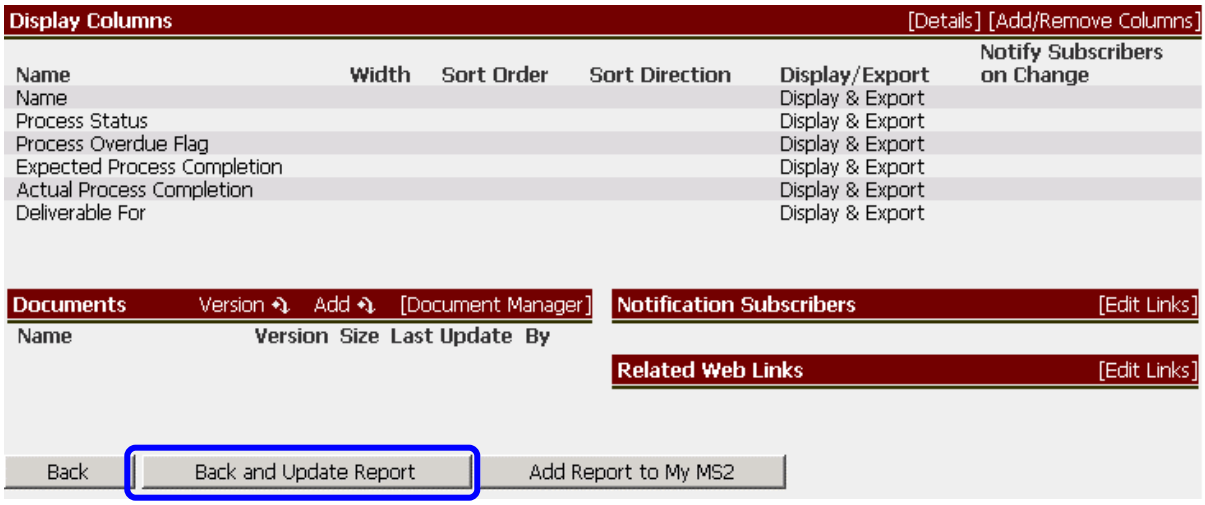
5. In the left selection box, select Process Overdue Flag and click **[Add.]** Move the flag before the Expected Process Completion by selecting it in the right window and click **[Up].**



6. Select Page Type in the right selection box and click Remove. Click **[Save]** to return to the report details page.



7. Back on the Report Details page, click on **Back and Update Report** to regenerate your report based on the new columns.



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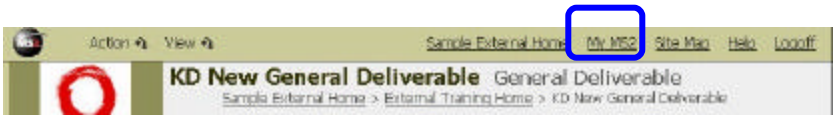
Exercise 9: Set-up Notifications on My Deliverables Report

1. Click **[My MS2]** on the top of your page.

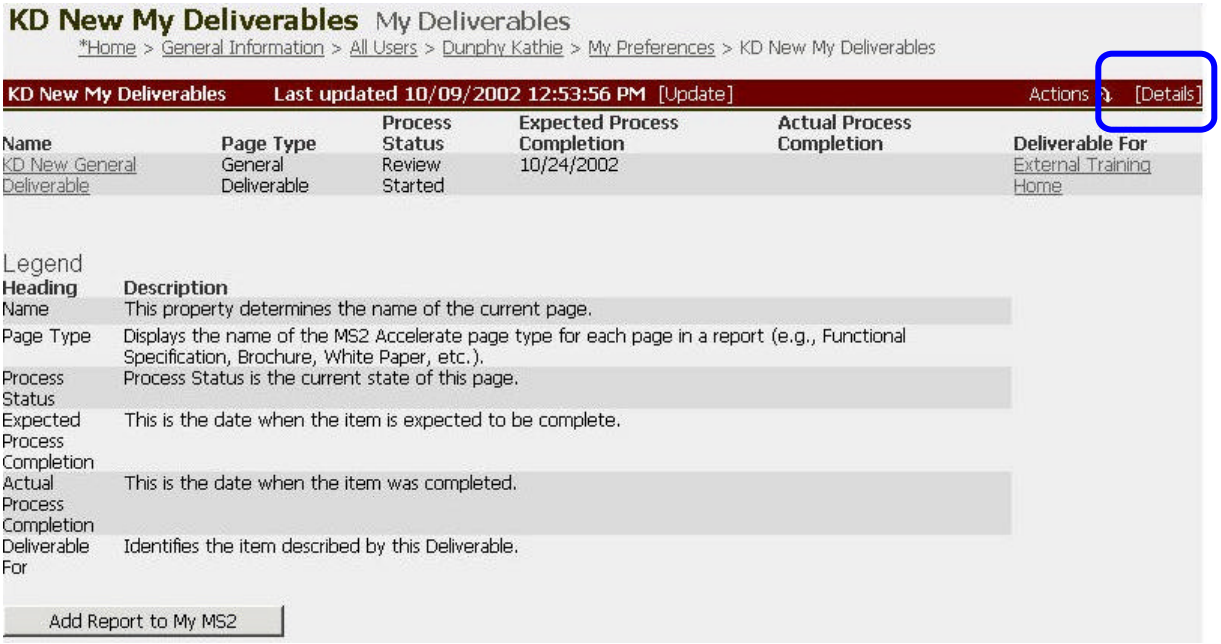


Note: **[My MS2]** is accessible from the top of any page

2. Click on your newly created **[My Deliverables]** report.



3. Click on **[Details]** in the header bar to set up the notifications for this report.



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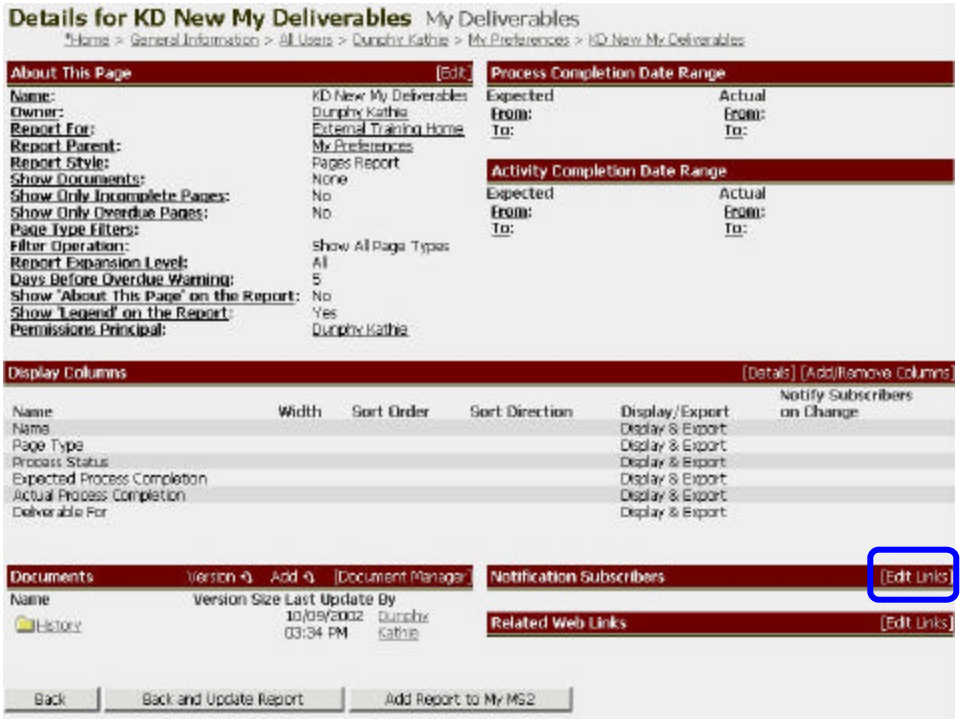
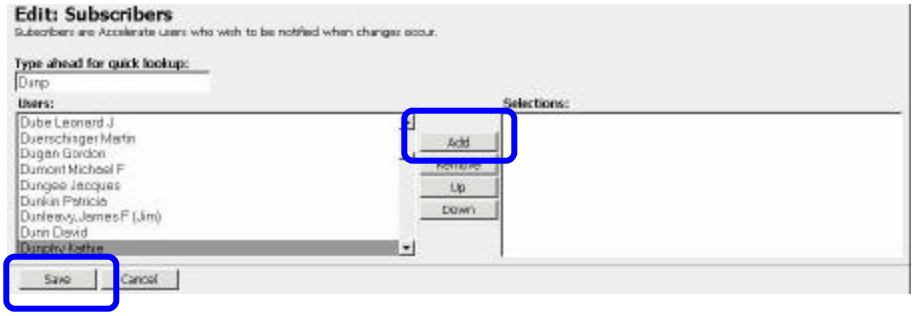
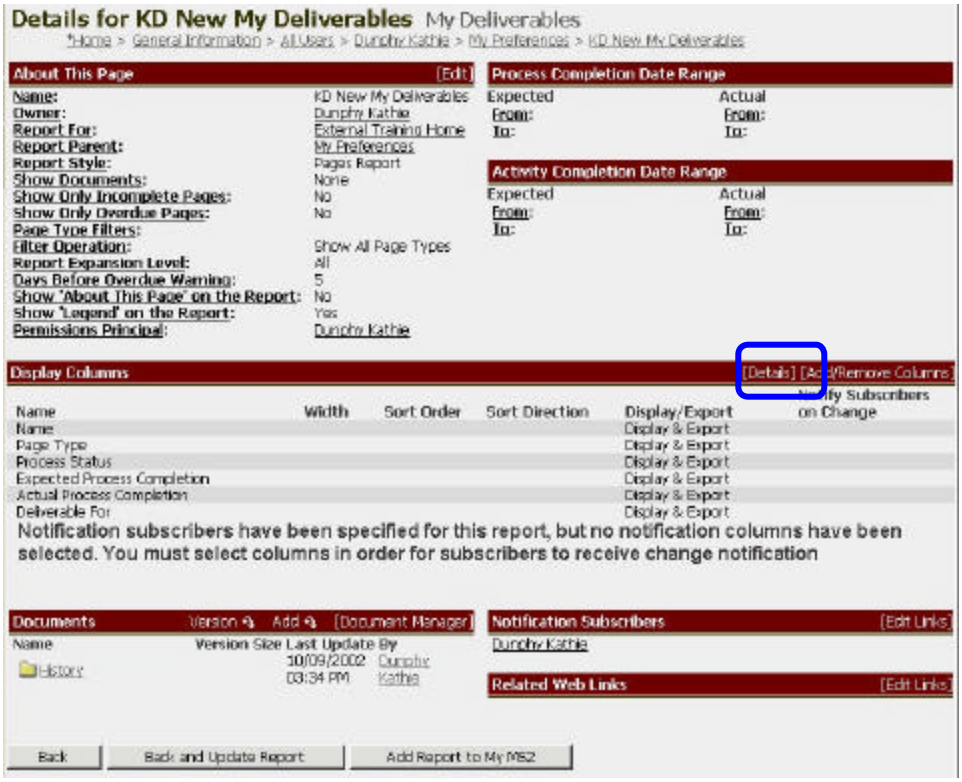
8. To add yourself to the notification list, click on **[Edit Links]** in the Notification Subscribers section header.



9. Find your name in the Users selection box by either scrolling or using the Type Ahead box and click on **[Add]** to add yourself to the Selection box. Click on **[Save]** to return to the report details page.

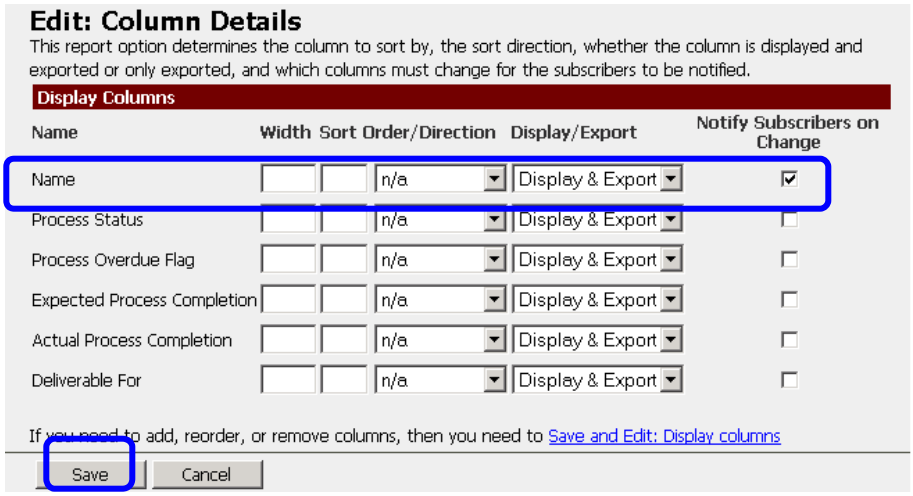


10. Back on the report details page, click on **"Details"** in the Display Columns section header to configure what you want to trigger the notification



11. A report will send you notification if any of the data in the selected Display Columns changes. To get notified when a new deliverable is assigned to you, select the check box next to **"Name"** to add the Name column as a notification column.

12. Click on **[Save]** to go back to the report details page.



(Another example: if you want to be notified if any of your deliverables are coming due, you can select **Process Overdue Flag** as a notification column).

You can select multiple Notification Columns. If any data in these columns change, everyone on the Notification Subscriber list will get an email alert.

13. Click on the **[Back]** button on the bottom of the details page to return to the My Deliverables report page.

Note: Report notifications run once a day at 2am. If a new deliverable is added during the day, you will not get email notification until 2am.

Exercise 10: Create an Issue

1. Go back to the External Training Home page by clicking on the link under **"My Links"**.

2. On the right hand side of the screen under the Issues section, click on **[External Training Issues Bucket]**.



3. On the Issues page, create a new issue by clicking on **"Action"**, then selecting **"Create Page"** and then **"Issues"**.



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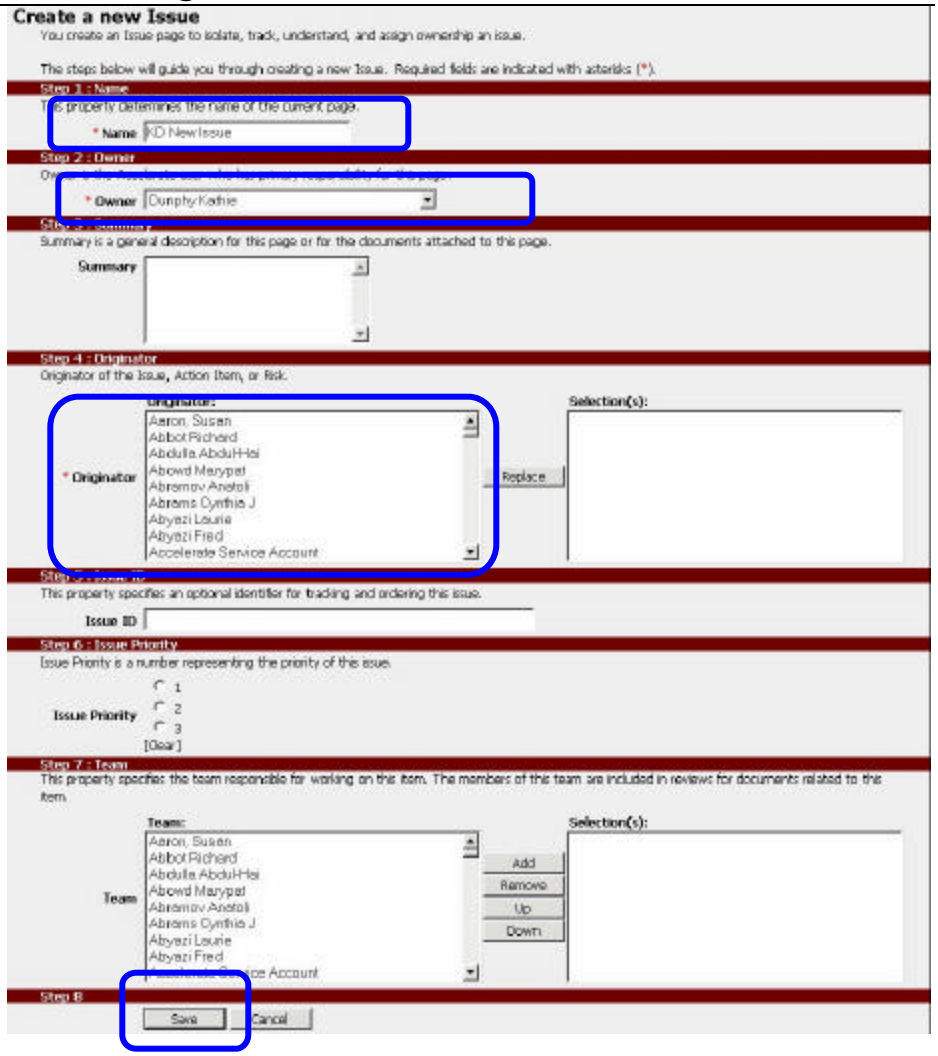
4. On the **"Create a new Issue"** page, fill in the requested fields (mandatory fields have a * in front) and click **[Save]**.

5. You are then brought to the new issue page you just created. On this page, you can add a document or update the process status.



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Exercise 12: Help for MS2 Accelerate

1. Almost all Accelerate pages have a Help link at the top of the page.



2. The Help link is your portal to MS2 Accelerate help. The Help page provides information about the page you're on as well as links to other topics of interest.



Accelerate Support:

Send all comments, questions & issues via E-mail to acceleratesupt@lucent.com . Typical response time is 24 hours. Please include all contact information in the e-mail

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