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# Accolade Go<sup>®</sup>

## Mobile Guide for v2.1

For Sopheon Accolade<sup>®</sup> v13.0 and higher



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## About Sopheon Accolade®

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## About this Guide

Welcome to the *Sopheon Accolade Go Mobile Guide*. The mobile application serves as a separate solution for submitting ideas, viewing Accolade layouts and project information, and submitting decisions for workflow actions and gates.

This guide describes how to install and configure Accolade Go, as well as how users can download the application on Android and iOS devices.

This version of Accolade Go is intended for integration with Sopheon Accolade v.13.0 and higher.

## Assumptions

This guide assumes you are familiar with Accolade and setting up and administrating databases, including the following:

- Basic knowledge of Accolade, its procedures, and concepts.
- The Microsoft Windows Server user interface and administration for the Windows Server version that you use.
- Internet Information Services (IIS) administration.

## Font Conventions

- This **bold font** is used for important words and the names of the items you need to identify.

Create a SQL account named “Geneva”, and give this account the **VS\_Write** database role.

- This `fixed-width font` is used for examples of code, paths, and URLs.

`https://:your-server-name:port-number/`

- *This italic font* is used for document names. *An italic font* enclosed in brackets shows what information is displayed in this location when the information is changeable, rather than fixed.

Process Document - Smart Excel *<version>*.xlt

- [Blue text](#) indicates a cross-reference link that you can click to take you to that location.

## Icon Conventions



- Indicates a tip to assist with Accolade configuration or management.



- Indicates an example use case to assist with component configuration.

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**Important!** This is an important statement. Read it carefully before proceeding with an action.

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## Related Documentation

*Sopheon Accolade Installation Guide* for versions 13.0 and higher.

## Contacting Technical Publications

To send comments and suggestions regarding this document, send email to [techpubs@sopheon.com](mailto:techpubs@sopheon.com).

## Accolade Go At A Glance

Accolade Go provides a solution for company executives and other decision makers to easily perform actions that help projects and initiatives progress forward. Accolade Go surfaces key information including open workflow actions that need approval, open gate votes, and customer-defined pages that display pertinent organization data. This information streamlined in a mobile application allows users to submit ideas, workflow decisions, gate votes, and gate decisions.

Accolade Go is available for download by all users who have access to the application. However, the following users will find the most benefit with the mobile application:

- Any user submitting a workflow decision or submitting an idea.
- Gatekeepers voting on gate decisions.
- Gate owners setting gate decisions.
- Users needing to access layout pages that display project data.

## Supported Mobile Platforms

Accolade Go is compatible with the following devices and versions:

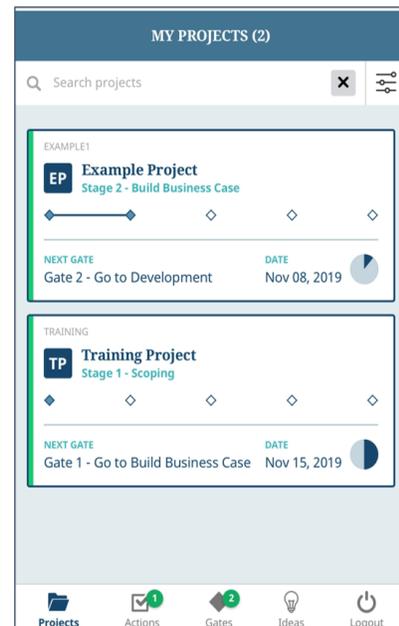
- iOS 12.4.x, 13.7.x, and 14.0.x
- Android 9.x, 10.x, and 11.x

## Accolade Go Components

Accolade Go components include Projects, Actions, and Gates and are all accessible from the navigation bar.

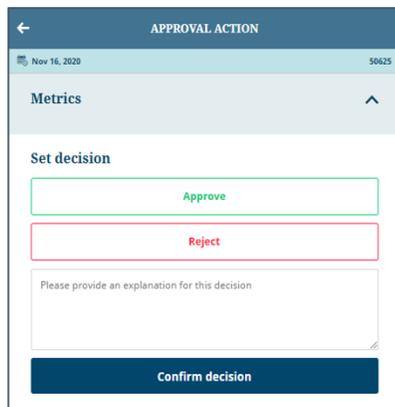
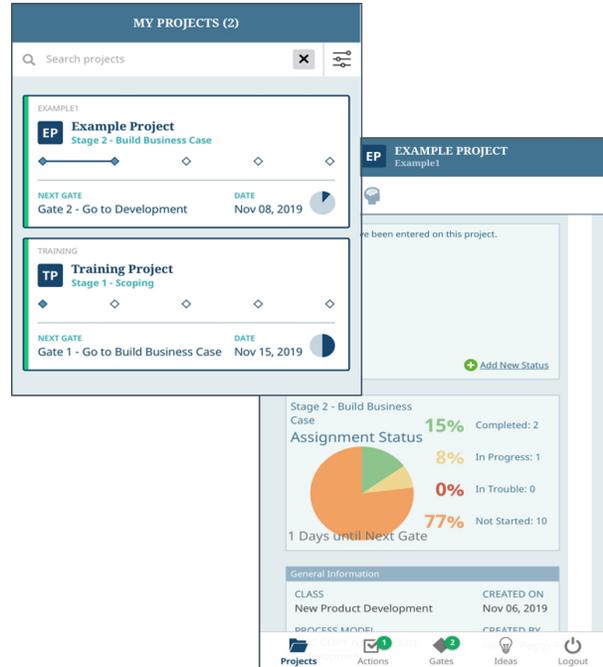
Click  in the upper right corner of any page to filter and sort the list of projects, actions, and gates displayed.

**Note:** Depending on your company's configuration, the components available in Accolade Go may be different than what is explained here.



The Projects menu displays projects you are assigned to as cards on the screen that contain generic information about the project including the current stage, next gate, and if the project is at risk for not meeting a deadline.

Click the project name to view more information about the project including the description, manager, current stage and gate, and any associated information such as charts, financial summaries, and scores.

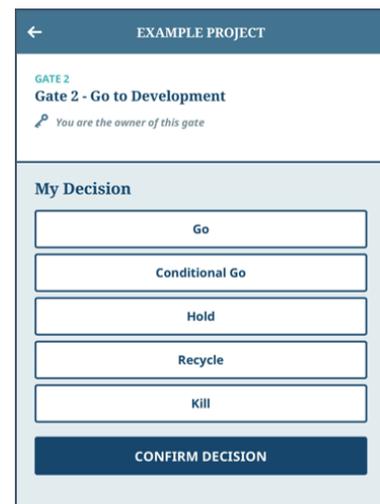


The Actions menu displays a list of actions you need to complete including workflow actions and decisions.

Click the workflow action card to view associated metrics and related documents to review before submitting a decision.

From the action card, click the  icon to submit a workflow decision and add comments.

The Gates menu displays a list of gates you need to either vote on or submit a gate decision, depending on your gate assignment. Click on the gate to view gate details, and to vote or enter a decision.



If your company uses Idea Submission, the Ideas menu allows you to submit an idea at any time, without logging directly into Accolade or the Accolade Go application.



## Installing Accolade Go Overview

Installing the Accolade Go package involves the following:

- Installing Accolade Go on the application server
- Enabling reCAPTCHA security for Accolade Go
- Configuring Accolade Go in the Accolade Administrator Console
- Downloading Accolade Go on client mobile devices

## Installing Accolade Go

The Accolade Go mobile application is installed as a plugin from the main Accolade application accessed via a web browser. Accolade Go is not available for purchase in mobile application stores.

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**Important!** The installation of Accolade Go requires stopping and restarting IIS on the application server. Users will temporarily be unable to access Accolade during this process. It is recommended you install Accolade Go when users are not using the application.

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### To install Accolade Go:

1. Log on to the application server as a local administrator.
2. Copy the media folder on the local server, preferably in a location where updates are archived. This is typically on a C or D drive such as C:\Installation.
3. On the application server, stop all Accolade services and recycle the application pools in IIS Manager.
4. Backup the Accolade databases prior to running the database scripts.

See the *Sopheon Accolade Installation Guide* for more information on backing up the databases and running database scripts.

5. Log onto the database server as a user with the system administrator role.
6. Open **SQL Server Management Studio** and navigate to the **Server Installation (Database)** folder.
7. Run the **Accolade Go v2.1.x.x.sql** script against the Accolade database.
8. On the application server, navigate to the **Server Installation (Application)** folder and run the **Setup.exe** file. This restarts all Accolade services.

## Enabling Accolade Go Security

Accolade Go uses reCAPTCHA to verify idea submissions that are made when a user is not signed into Accolade. A reCAPTCHA is a program that protects websites against bots by generating and grading tests that humans can pass but current computer programs cannot. This verification is intended to protect company assets and block malicious software or bots by verifying a human user is present and entering the information being submitted to Accolade.

To install reCAPTCHA, you will first need to access Google's reCAPTCHA website and sign up for an API key pair. The key pair consists of a site key and a secret key. The site key is used to invoke reCAPTCHA service on the mobile application, and the secret key authorizes communication between Accolade and the reCAPTCHA server to verify the user's response.

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**Important!** Each API key is generated and revealed at the time of creation, and cannot be viewed a second time. If this key is lost or misplaced, you will need to delete the existing key and create a new one.

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Enabling reCAPTCHA requires the following steps:

- Creating the reCAPTCHA API keys
- Configuring the reCAPTCHA parameters in the Accolade Administration Console

### To create the reCAPTCHA API keys:

1. Navigate to the reCAPTCHA website, which can be found at the following URL:

<https://www.google.com/recaptcha/admin>

2. In the **Label** field, enter a name to identify the request.
3. In the **reCAPTCHA type** field, select **reCAPTCHA v2**.

The "I'm not a robot" check box requires the user to click a check box indicating the user is not a robot. This will either pass the user immediately (with no CAPTCHA) or challenge them to validate whether or not they are human.

4. In the **Domains** field, enter the authorized domains.
5. In the **Owners** field, enter the email addresses of any additional application owners.
6. Click the check box to **accept the reCAPTCHA terms of service**.
7. Click **Submit** to register the application and generate the reCAPTCHA API keys.

After you click **Submit** both the site and secret key values are displayed. Click **Copy KEY** to copy each key value a different location, as you will need to enter them in the Accolade Administration Console and will not be able to retrieve them again once you exit the dialog. Both keys need to be kept safe for security purposes.

Once the keys have been created, update the **reCAPTCHA site key** and **reCAPTCHA secret key** parameter settings in the Accolade Administration Console to enable reCAPTCHA.

## Configuring Accolade Go

Accolade Go has several configuration options that can be managed using parameters found in the Accolade Administration Console.

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**Important!** Changes to these settings require stopping and restarting IIS and all Accolade services on the application server for a second time.

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### To configure Accolade Go parameters:

1. Open the Accolade Administration Console on the application server by clicking the Windows **Start** menu and selecting **Accolade Administration Console**.
2. Navigate to the **Standard Parameters** tab and select **Mobile** from the **Category** drop-down list.
3. Select the **Show Advanced** check box to display the advanced parameters.
4. Set the following parameters:

Display Name	Description	Default Value
<b>Enable Push Notifications</b>	<p>Enables or disables Accolade Go from sending notifications to your device.</p> <p>Applies to Accolade users that download Accolade Go.</p> <p>0 = disabled, 1 = enabled.</p> <p><b>Note:</b> Adjust the value of the Push Notification for TTL system parameter if necessary. This parameter determines the number of seconds the push message is retained by the push service for Accolade Go.</p>	1

Display Name	Description	Default Value
<b>reCAPTCHA site key</b>	Paste in the value of the reCAPTCHA site key created earlier.	
<b>reCAPTCHA secret key</b>	Paste in the value of the reCAPTCHA secret key created earlier.	
<b>Tabs to show</b>	Comma-separated ordered list of tabs to display in the navigation bar. First tab is the landing page. Adapt the selection and order as necessary.	MyProjects MyActions MyGates Ideas
<b>Enabled features</b>	Enables or disables the WorkflowHistory and/or AnonymousIdeas features.  WorkflowHistory allows users to view the history of a workflow.  AnonymousIdeas allows users to submit ideas via Accolade Go without requiring a user to login.	WorkflowHistory AnonymousIdeas
<b>Workflow date filters</b>	Comma-separated ordered list of workflow date filters.  Date filter format: <i>&lt;units&gt; &lt;date part&gt;   &lt;mode&gt; !</i>  Possible values: <ul style="list-style-type: none"> <li><b>Date part:</b> Day, Days, Week, Weeks, Month, Months, Quarter, Quarters, Year, Years</li> <li><b>Modes:</b> Due, Start</li> </ul> The exclamation mark indicates the default filter. If no default filter is set, the built-in <b>All</b> filter will be the default.  <b>Examples:</b> 1 Month 1 Week   Due 24 Days   Start ! 1 Year !	Default date filters: 6 Months, 3 Months, 1 Month  Default mode: Due
<b>Workflow category metric</b>	System name of metric used to group workflow actions on the Actions page.  Metric type must be String (including calculated expressions) or List.	
<b>Hide workflows with unknown</b>	Hide workflow actions of projects in the <b>[Default]</b> category.	

Display Name	Description	Default Value
<b>category</b>	💡 Projects for which no Workflow category is set are automatically labeled <b>[Default]</b> .	
<b>My Actions Sliding Expiration Timeout (hh:mm:ss)</b>	The time an Actions list will remain in cache after the last access. The list is cached by the API on the server for performance benefits.	00:00:30
<b>SSO with MFA</b>	Enabling this parameter disables the Password field and the <b>Confirm Decision</b> button for a workflow action. The value should be set to <b>0</b> to require the entry of a password, or to <b>1</b> if SSO with MFA is used. 0 = disabled, 1 = enabled.  <b>Important!</b> If Accolade is configured for SSO with MFA (multi-factor authentication), the required password for the decision will not work.	0
<b>Workflow order by options</b>	Comma-separated ordered list of workflow filter order options. If no default is defined, <b>Deadline</b> will be the default.  <b>Note:</b> The Deadline and StartDate options refer to the appropriate dates for the workflow, not for the project.	None Deadline StartDate Status

5. Click **Apply** to save your changes.
6. Clear the cache by navigating to the **Distributed Cache Configuration** tab, clicking **Clear Cache** to clear the distributed cache, and click **Apply**.
7. Restart IIS and all Accolade services.

## Verifying Accolade Go Access

Once all services are started, ensure the following is accessible from the Accolade application server:

- The Firebase Cloud Messaging Server Google API, which can be found at the following URL:

<https://fcm.googleapis.com>

- The reCAPTCHA Google API, which can be found at the following URL:

<https://www.google.com/recaptcha/api/siteverify>

You may need to configure the Proxy Server or Firewall to allow connections to the internet and add an outbound rule to allow connections to the stated URLs.

## Downloading Accolade Go

Accolade Go can be downloaded for Android and iOS devices. However, users do not download it from a central application store. Users must navigate to the Accolade application via a browser and save it to their mobile home screen.

Supported browsers for the main Accolade application include the following:

- Microsoft Edge
- Safari
- Mozilla Firefox
- Google Chrome

Depending on your mobile operating system, some browsers may not be supported.

After Accolade Go has been installed on the server, instruct users to download Accolade Go with the following procedure to their mobile device.

**Note:** Viewing Accolade Go offline is only supported for Android devices.

## Downloading for Android

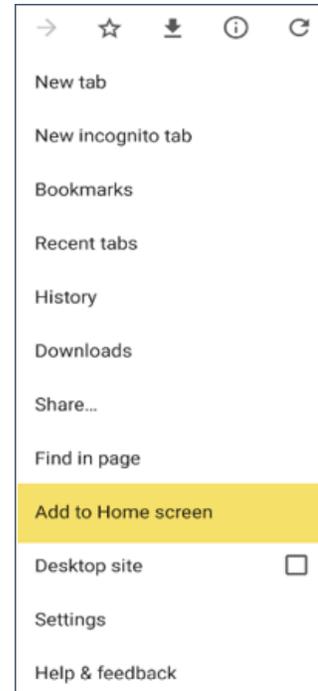
### To download Accolade Go for Android:

1. Open the Google Chrome browser.
2. Navigate to the Accolade application in the following URL field:

`https://<server>/AccoladeGo`

3. Click the ellipses icon to the right of the URL field.
4. Click **Add to Home Screen**.
5. Click **Add**.

The Accolade Go mobile icon should download to the home screen of your device.

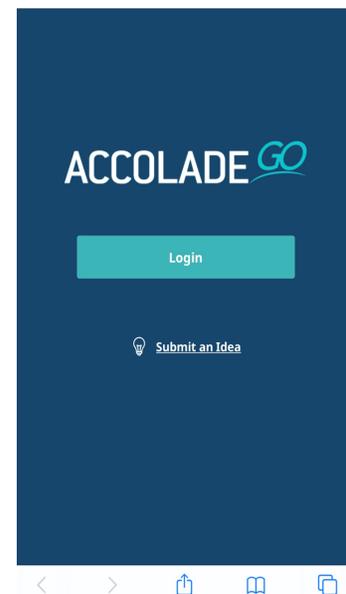


## Downloading for iOS

### To download Accolade Go for iOS:

1. Open the Safari browser.
  2. Navigate to the Accolade application in the following URL field:
- `https://<server>/AccoladeGo`
3. Click the  icon, scroll down and click **Add to Home Screen**.
  4. Click **Add** on the Add to Home page.

The Accolade Go mobile icon should download to the home screen of your device.



## Installing Accolade Go in a Load-Balanced Environment

If your company configuration includes use of an Accolade Server Farm to provide a load-balanced environment, Accolade Go must be installed on all servers in the Server Farm.

Accolade Go should be installed and configured first on the "Main" Accolade Task server, then complete the following steps for the remaining servers in the Accolade Server Farm:

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**Important!** The installation of Accolade Go requires stopping and restarting IIS on the servers. Users will temporarily be unable to access Accolade during this process. It is recommended you install Accolade Go when users are not using the application.

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1. Complete the steps in the ["Installing Accolade Go" on page 8](#) and ["Configuring Accolade Go" on page 10](#) sections for the installation on the "Main" Accolade Task server.
2. Copy the entire **Server Installation (Application)** folder from the "Main" Task Server to all remaining Accolade Server Farm servers.
3. For each server, run the **Setup.exe** file located in the **Server Installation (Application)** folder.
4. In the Tasks.config file located in the `<installdir>\Accolade\Configuration` folder, make sure the following task entries are commented out:
  - InstantNotificationTask
  - StatusNotificationTask
5. Restart all Accolade services on the Accolade server.

**Note:** See Appendix B in the appropriate *Sopheon Accolade Installation Guide* version for more information on setting up a load balanced server environment.

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