



Sopheon Accolade®

Process Design - Importing Configuration Training Guide

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About Sopheon Accolade®

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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
<i>Sopheon Accolade What's New in This Release</i>	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.
<i>Sopheon Accolade Administrator's Guide</i>	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
<i>Sopheon Accolade Installation Guide</i>	Provides information about the installation of the application and its required databases.
<i>Dashboards for Accolade Installation Guide</i>	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
- Project Importer
- Reference Table Manager

Terms and Concepts

- Reference Tables

Related Training Modules

- Reference Table Design
- Process Design Overview

Importing and Exporting Configuration Components Overview

Accolade provides Administrators and Process Designers the ability to transport configuration components between environments by exporting and importing via spreadsheets.

Process design and system configuration components can be downloaded from one Accolade environment and then uploaded into a different Accolade environment, and some mass configuration changes can be made using these processes.

Importing and Exporting Configuration Components Best Practices

Keep the following set of best practice recommendations in mind when importing and exporting configuration components:

- If you have spreadsheets that were downloaded from a previous release, Sopheon recommends completing a download after upgrading to the latest release, to ensure your spreadsheet contains any new configuration settings added to the release.
- Using the import and export tools to update or remove configuration within the same environment can result in errors or unintended changes if information is missing in the import or an error occurs during the process.

The following guidelines are recommended when creating or updating files for import:

- Apply available Accolade filters to limit the export to the information for the components you wish to change.
- Include all file worksheets in the file to be uploaded.
- The columns in the spreadsheets must be in the same order for changes to upload successfully. All columns must be present, however the value in a column can be blank if appropriate.
- When uploading changes to component configuration, such as changes to quick grids or layouts, the existing configuration will be replaced with the imported version in the workbook. If existing components, such as a pod within a layout or an individual grid within a quick grid, are not included in the file, they will be removed.

Sopheon recommends creating a backup version of the original file prior to making any changes.

- Component system names cannot be changed using the export/import functionality. Although not recommended, component system names can be changed in the user interface, as necessary.
- Be mindful when changing Process Model configuration through the Import Process Models functionality. For example, if you are changing the number of stages or gates on an inactive

process model, this change should be made in the Process Model definition page, or the current model should be obsoleted and a new model created. The Import tool will prompt an error message and will not accept the change if not allowed. Additionally, if the configuration changes are significant or will impact a large number of existing projects, you may experience additional system impacts.

- The user performing the new configuration imports should have the highest configuration access group required by the components being loaded. This will minimize the conflicts associated with configuration access group errors related to the user's access levels and will reduce the chances of an incomplete upload.
- If you are transporting new configuration between environments, for example from a test environment to a production environment, components should be loaded in a sequence in order to increase efficiency and minimize load errors. Independent components should be loaded into the Accolade environment first, followed by dependent components, and complex components should be loaded last.

Sopheon recommends the following order when importing components:

Important! The steps below are the steps to move a full configuration from one system to another. The order of these steps may vary depending on what is being moved or changed, and the existing configuration in the destination environment. For complex deployments or configuration changes, please contact Sopheon Customer Support prior to starting, to ensure that you protect the integrity of the data and don't inadvertently cause problems.

Configuration Item	Dependencies*	Notes
Independent Components		
Parameters	None	These should generally only be changed for an initial deployment.
Access Groups	None	
Security Lists	None	Sopheon recommends using the reference table setup method for new security lists.
Users	None	Note that if the User import references new functions or functional areas that have not been created, they will cause errors when loading. The User importer will need to be reloaded after the functions and functional areas are imported.

Configuration Item	Dependencies*	Notes
		Additionally, if your company uses Resource Planning and the User importer references new resource pools that have not been created, they will cause errors when loading. This can be corrected when running the Resource Pool and Resource importers after the configuration import process is complete.
Reference Tables	None	Note that the Reference Table importer does not import the reference table data, only the table configuration, so the table version must also be manually uploaded at this time.
Queries	None	
Classes	None	If any new classes have the Create Model in Planning defined as Yes , change these fields to No prior to upload in order to prevent errors. To apply this setting after the initial upload, these fields will need to be changed back to Yes on the workbook, and the workbook will need to be reloaded after the process models are imported.
Dependent Components		
Functional Areas and Functions	User logins**	If this import contains new functions or functional areas to be created, and these are referenced by the user import performed earlier, you will need to re-run the Users import after the Functional Area and Functions import is completed.
Extended Fields	Queries	
HTML Reports	Queries	
Metrics	Reference Tables** Calculated metrics may include additional component dependencies as noted.	When exported from an environment, the metrics workbook will contain associations to all related process models or related metrics. If these metrics or process models have not been created yet, the associations will cause errors when loading. Additionally, if metrics include associations via their calculation expressions, these associations might cause errors when loading the import.

Configuration Item	Dependencies*	Notes
		<p>Important! To minimize errors when creating new metrics, Sopheon recommends users create and load a truncated version of the workbook with all process model associations columns deleted, the Is Calculated field defined as No for all metrics, and the calculated expressions and triggers details removed as necessary.</p> <p>To apply these settings after the initial upload, a version of the workbook including all of these settings will need to be reloaded after the process models are imported. This will capture any metrics associations that were missing on the initial upload.</p>
Matrices	<p>Metrics</p> <p>Matrices that include calculated metrics may include additional component dependencies as noted.</p>	<p>When exported from an environment, the matrices workbook will contain associations to all related process models or related metrics. If these metrics or process models have not been created yet, the associations will cause errors when loading. Additionally, if metrics include associations via their calculation expressions, these associations might cause errors when loading the import.</p> <p>Important! To minimize errors when creating new metrics, Sopheon recommends users create and load a truncated version of the workbook with all process model associations columns deleted, the Is Calculated field defined as No for all metrics, and the calculated expressions and triggers details removed as necessary.</p> <p>To apply these settings after the initial upload, a version of the workbook including all of these settings will need to be reloaded after the process models are imported. This will capture any metrics associations that were missing on the initial upload.</p>
Accolade Online Reports	<p>Metrics**</p> <p>User IDs**</p>	<p>Note that ownership can only be changed as necessary on the initial import of a new report.</p>

Configuration Item	Dependencies*	Notes
Accolade Charts	Accolade Online Report source User logins** Reference Tables**	
Templates	Metrics	
Quick Grids	Metrics Matrices**	
Workflows	Metrics Templates** Functions** Users**	
Security Profiles	Classes Metrics	
MS Excel Reports	Queries** Templates**	
Layouts	Metrics Online Reports Charts Quick Grids	<p>If layouts contain new planning views that have not been created yet, they will cause errors when loading. These planning views will have to be manually created in the new environment prior to uploading the layout configuration.</p> <p>If any new layouts have the Generate Global Link defined as Yes, the upload will automatically generate the global link, however you may need to review and/or edit the link settings manually if they are not included in the Global Links import.</p>
Complex Components		
Process Models	Dependencies can include any combination of independent and dependent components	<p>Important! After completing the Process Models import, re-import the following workbooks as necessary:</p> <ul style="list-style-type: none"> • The Metrics workbook should be reloaded with the process model associations and calculations included. • The Matrices workbook should be reloaded with the calculations included. • The Classes workbook should be reloaded with the Create Model in Planning defined as Yes as necessary for classes/process

Configuration Item	Dependencies*	Notes
		models that are to be available for creating in Innovation Planning.
Migration Maps	Process Models Metrics	If you have made manual changes to a process model's gate name that is referenced in the file, it can cause errors with the Migration Map import. These migration maps will have to be manually created in the new environment.
Project Link Types	Process Models Metrics	
Global Links	Layouts** Process Models**	If global links contain new planning views that have not been created yet, they will cause errors when loading. These planning views will have to be manually created in the new environment prior to uploading global links configuration. If the Layout import included new layouts with the Generate Global Link defined as Yes , the associated global link has been created. The settings for these links can either be updated manually, or can be included in the Global Link import.

* Dependencies listed are only if the component being imported is mentioned in the configuration.

** The dependency only exists if the component is referenced within the configuration.

Importing and Exporting Classes

Accolade provides Administrators and Process Designers the ability to export classes from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate classes in each environment, download the information and import it into the new environment.

The download exports the classes configuration information into a spreadsheet file with the parts grouped into tabs.

To export classes:

1. From the **System** menu, select **Process > Classes**.
2. Select the classes that you want to download.

To narrow the list by class name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by process type, select a process type to display in the **Process Type** list. To download all classes, select **All**.

3. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import classes into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any classes that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Classes**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the classes in the spreadsheet, and adds any new classes with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Classes Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each class in the order listed below. For a description of each class setting, see the Creating Classes topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Class Definition

Column Name	Accepted Values on Upload*	Additional Notes
Class System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a class exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new class is created.
Class Name	Any	If blank, the class does not upload.
Process Type	Gated Non-Gated Idea	If blank, the class does not upload.
Icon	Valid icon name <ul style="list-style-type: none"> • Beaker *** • Circle *** • Cube *** • Folder *** • Gated *** • Gear *** • Hierarchy *** • Iteration *** • Puzzle *** • Square *** • Triangle *** • Miscellaneous <ul style="list-style-type: none"> Circles Clock Color Wheel Cubes Cycle Eye Flame Funnel Gears Idea Iteration Non-Gated Note Pie Pieces 	Select a category and color combination. *** All categories except for Miscellaneous allow for six color options - Blue, Green, Orange, Pink, Purple, and Red. The Folder and Gated categories also allow the color option Classic. Use the format (category) - (color) without the parentheses. For example, Beaker - Blue. If blank, the class does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
	Star	
Description	Any	Can be blank.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Gate Line-Up	Default to included Default to excluded Always included Always excluded	If Process Type is Non-Gated , Always Excluded must be selected. If blank, the class does not upload.
Reporting	Default to included Default to excluded Always included Always excluded	If blank, the class does not upload.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Is Portfolio	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Enable Email Notification	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Include in Portfolio Optimizer	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Include in Resource Editor	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Include in Save to Accolade	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Include in Time Tracking	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Show in Planning	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Create Model in Planning	Valid process model system name	If Show in Planning is Yes , a valid process model system name should be entered. If Show in Planning is No , leave blank. Note: If you are moving class and process model configuration and new classes have the Create Model in Planning

Column Name	Accepted Values on Upload*	Additional Notes
		defined as Yes , clear this from the workbook prior to upload. In order to apply this setting, this will need to be added back to the workbook, and the workbook reloaded after the process models are imported.
Include in Work Pod	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Event Reason Code

Event reason codes setup are optional when importing classes. The worksheet must be included in the spreadsheet file, but can be left blank if the classes do not have event reason codes.

Column Name	Accepted Values on Upload*	Additional Notes
Class System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a class exists, its settings are changed with the values in the uploaded file.
Event Type	In Trouble Change Project Manager Change Gate Date Change Gate Decision - Conditional Go Gate Decision - Kill Gate Decision - Hold Gate Decision - Recycle Gate Decision - Pending Decision	If blank, the event will not upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.

Column Name	Accepted Values on Upload*	Additional Notes
Event Reason Code	Alphanumeric characters, underscore**	If blank, the event will not upload.
Event Reason Name	Any	If blank, the event will not upload.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Security

Column Name	Accepted Values on Upload	Additional Notes
Class System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a class exists, its settings are changed with the values in the uploaded file.
Configuration Access Group	Valid access group system name	Include a separate row for each access group.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Process Models

Accolade provides Administrators and Process Designers the ability to export process model information from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate process models in each environment, download the information and import it into the new environment.

The download exports the process model configuration information into a spreadsheet file with the parts of the process model grouped into tabs.

Note: The download does not include metric associations. If you are using the process described below to create new models, ensure that templates are in place in the Template Library, import the models, and then associate metrics for each individual model or for multiple models at one time using the metric export/import utility.

To export model settings:

Note: If you wish to download a process model, you may select up to 20 gatekeepers. If you add more than 20 gatekeepers, the model cannot be downloaded.

1. From the **System** menu, select **Process > All Models**.
2. Select the models that you want to download.

To narrow the list by process model name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by class, select a class to display in the **Class** list. To download all process models, select **All**.

3. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save the file a more accessible location.

Note: Only process models to which you have view and/or edit configuration access group rights will download. Process models and components you can only view may be included in the file, but you can only upload changes to models and components to which you have explicit edit permission.

To import model settings into Accolade:

1. Ensure the data within the spreadsheet file meets the requirements for a successful import.
2. Remove any models from the spreadsheet that you do not want to include in the upload and save the file.
3. From the **System** menu, select **Process > All Models**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the models in the spreadsheet, and adds any new models with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Process models that are imported are subject to access group configuration rules. The user may assign components to a process model parent in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete model upload. Once the upload is complete, component access groups can be reviewed and edited from the process model's component tree tab.


Model Settings Included in the Spreadsheet File


The columns in the downloaded spreadsheet include the settings for each process model, including stage and gate configuration, in the order listed below. For a description of each model setting, see the online Help for Creating Gated and Non-Gated Process Models or Creating Idea Process Models (if creating an Idea model).

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Process Models

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore** Must start with an A - Z or a - z character.	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new model is created.
Display Name	Any	If blank, the model does not upload.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Disable Add New	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Hide From Add New	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Default Portfolio Model	Valid process model system name	Applies to models used for Idea campaigns.
Default Accolade Team Leader User	Valid login information for an Accolade user	If blank or invalid, set to None or to the metric value set in the Default Accolade Team Leader Metric column.
Default Accolade Team Leader Metric	Valid metric system name	If blank or invalid, set to None or to the Accolade user defined in the Default Accolade Team Leader User column. If a value is also available in the Default Accolade Team Leader User column, the upload uses that column's value.

Column Name	Accepted Values on Upload*	Additional Notes
Class System Name	Valid class system name that matches a valid process type	The class and process type must match. If not, the model changes do not upload. If the class does not exist, the upload creates a new class.
Process Type	Gated Non-Gated Idea	All other values are treated as blank and the row does not upload.  You cannot change an existing model's process type.
Allow Mid-Process Project Start for Creation	Select by Stage Select by Gate No	All other values are treated as No on upload.
Allow Mid-Process Project Start for Migration	Select by Stage Select by Gate No	All other values are treated as No on upload.
Description	Any	Can be blank.
Related Document Categories	Any	Separate categories using the pipe () character. Can be blank.
Initial Tab	Valid project page name or valid layout system name	Indicated value must be listed on the Pages tab in the Page System Name column.
Default Access Group	Valid access group system name	Blank or invalid values do not set an access group.
Idea Deliverable System Name	Valid name of a web document assigned to a deliverable within an idea model	Applies to idea models only.
Disable Idea File Attachments	Yes, Y, True, 1, X*	Applies to idea models only. All other values are treated as No on upload.
Hide The Idea Type Row	Yes, Y, True, 1, X*	Applies to idea models only. All other values are treated as No on upload.
Hide Gate	Yes, Y, True, 1, X*	Applies to idea models only.

Column Name	Accepted Values on Upload*	Additional Notes
Decision Option For Idea Submitter		All other values are treated as No on upload.
Process Model Display Type	Compact Traditional	All other values are treated as Compact on upload.
Set Gates Page to read-only	Yes, Y, True, 1, X*	Applies to gated models and idea models with gates only. All other values are treated as No on upload.
Restricted Access Groups	Valid access group system name	Separate names using the pipe () character.
Default Access Group Metric	Valid metric system name of a String, List, Long String, or Number metric	All other values do not assign a metric to set the access group.
Project Name Metric	Valid metric system name	If blank or invalid, the project name is not determined by a metric value.
Enforce Function for Team Selection	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Enforce Project Security	Yes, Y, True, 1, X*	All other values are treated as No on upload.  If you enable this option, existing projects using this model that contain users assigned outside their security access <i>are not</i> automatically removed from the project.
Protect Document Versions from Deletion	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Project ID Metric	Valid metric system name	If blank or invalid, the project ID is not determined by a metric value.
Require Project Manager on Create	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Configuration Access Group	Valid access group display name	Separate names using the pipe () character.

Column Name	Accepted Values on Upload*	Additional Notes
		If blank, the model does not upload.
Extend Project Edit Rights	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Start Date Display Name	Any	If blank, the model does not upload.
Show Creation	Hide Required Edit	If blank, the model does not upload.
Show Migration	Hide ReadOnly Edit	If blank, the model does not upload.
Show Process Graphic	Hide ReadOnly Edit	If blank, the model does not upload.
Show Resource Editor	Hide ReadOnly	If blank, the model does not upload.
End Date Display Name	Any	If blank, the model does not upload.
Show Creation	Hide Required Edit	If blank, the model does not upload.
Show Migration	Hide ReadOnly Edit	If blank, the model does not upload.
Show Process Graphic	Hide ReadOnly Edit	If blank, the model does not upload.
Show Resource Editor	Hide ReadOnly	If blank, the model does not upload.
Currency Show Creation	Hide Edit	If blank, the model does not upload.
Show Migration	Hide ReadOnly Edit	If blank, the model does not upload.
Extended Project Data 1...10 Display Name***	Any	If blank, the model does not upload.
Show Creation***	Hide Edit	If blank, the model does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
Show Migration***	Hide ReadOnly Edit	If blank, the model does not upload.
Show Planning***	Hide Edit	If blank, the model does not upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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*** Each **Extended Project Data** field in the spreadsheet has a set of columns to set the display name and hide, edit, and read-only details as described here. For example Extended Project Data 1, Extended Project Data 2, and so on up to a maximum of 10.

- Pages

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Page System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a page exists, its settings are changed with the values in the uploaded file.
Visible	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Order	Number	Is set to 0 on upload if no value is entered or the value is not a number.
Visibility Layout Rule System Name	Valid system name of a layout rule established on the Layout Rules worksheet	All other values are set to None on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Link Rules

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Link Rule System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a link exists, its settings are changed with the values in the uploaded file.
Link Rule Name	Any	
Link Type System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a link exists, its settings are changed with the values in the uploaded file.
Link Process Model System Names	Alphanumeric characters, underscore**	Separate model names using the pipe () character.
Order	Number	Is set to 0 on upload if no value is entered or the value is not a number.

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- Link Rule Metrics

The Link Rule Metrics worksheet contains the metric conditions that must be met for a rule defined at the model-level to take effect. The contents of this worksheet works with the rules defined in the [Link Rules](#) worksheet. Each row in the worksheet represents a single condition for a link rule.

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Link Rule Name	Valid name of a link rule established on the Link Rules worksheet	
Metric System Name	Valid metric system name	If blank or invalid, the condition does not upload.
Metric Value	The value the metric must be set to for the project link to be created	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.

Column Name	Accepted Values on Upload	Additional Notes
Source Metric System Name	Valid metric system name	If blank or invalid, the condition does not upload.
Order	Number	Is set to 0 on upload if no value is entered or the value is not a number.

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- Phases

The Phases worksheet contains the information about each stage/gate combination within the model. After a model is used in a project (open or closed) you can no longer add or reorder a stage or a gate in that model. However, you can update the details within the model as described below.

Column Name	Accepted Values on Upload*	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Phase ID	Number	The number that identifies the placement of the phase within the Phase Gate sequence. For example, a Phase ID of 1 indicates the first stage/gate pair within the model. Phase ID of 2 indicates the stage/gate pair that follows the first stage/gate pair within the model, and so on. A model can have a single stage or a single gate.
Stage Name	Any	Can be blank if at least one Gate Name is included.
Stage Description	Any	Can be blank.
Gate Name	Any	Can be blank if at least one Stage Name is included.
Gate Description	Any	Can be blank.
Default Gate Manager	Project Manager Project Creator None	All other values are set to None on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Set Gate Date Metric	Valid metric system name	All other values are treated as blank on upload.
Set Gate Date At Project Creation	None Show Required	All other values are set to None on upload.
Require Gatekeeper Voting	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Set Gate Decision On Approval	Yes, Y, True, 1, X*	If Set Gate Decision On Approval is defined as Yes, Y, True, 1, X*, the Require Gatekeeper Voting column must also be Yes, Y, True, 1, X*. All other values are treated as No on upload.
Gate Owner Can Skip	Yes, Y, True, 1, X*	If Gate Owner Can Ship is defined as Yes, Y, True, 1, X*, the Require Gatekeeper Voting column must also be Yes, Y, True, 1, X*. All other values are treated as No on upload.
Set Go Restriction Message Metric	Valid metric system name	All other values are treated as blank on upload.
Gatekeeper Function***	Valid function system name	All other values are set to None on upload.
Gatekeeper Login***	Valid login information for an Accolade user	All other values are set to None on upload.
Gatekeeper Enforce Function on User Selection***	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Min Gate Date Metric	Valid metric system name	All other values are treated as blank on upload.
Max Gate Date Metric	Valid metric system name	All other values are treated as blank on upload.
Gate Layout	Valid layout system name	Can be blank if no layouts are selected. All other values are set to None on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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*** **Gatekeeper Function, Gatekeeper Login and Gatekeeper Enforce Function on User Selection** columns are included for each gatekeeper listed in the model.

- Gate Documents

Column Name	Accepted Values on Upload*	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Phase ID	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
Document Name	Any	If blank, the document does not upload.
Document System Name	Alphanumeric characters, underscore**	If blank, the document does not upload.
Description	Any	Can be blank.
Template	Any	Can be blank.
Template System Name	Valid template system name of a template available in the Template Library	The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template. If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity. All other values upload with no template attached. If updating to a new template and the new name is not valid, the system will default and retain the current template.
Order	Number	Is set to 0 on upload if no value is entered or the value is not a number.
Allow Version Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Configuration Access Group	Valid access group display name	Separate names using the pipe () character.

Column Name	Accepted Values on Upload*	Additional Notes
		If blank, the document does not upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Deliverables and Activities

Deliverables and activities are exported onto separate worksheets within the **ProcessModelWorkbook.xlsx** file. However, the content within each worksheet that defines a deliverable or an activity is the same as described below.

Column Name	Accepted Values on Upload*	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Phase ID	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
System Name	Alphanumeric characters, underscore**	If blank, the deliverable/activity does not upload.
Name	Any	If blank, the deliverable/activity does not upload.
Description	Any	Can be blank.
Template	Any	Can be blank.
Template System Name	Valid template system name of a template available in the Template Library	The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.

Column Name	Accepted Values on Upload*	Additional Notes
		<p>If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.</p> <p>All other values upload with no template attached.</p> <p>If updating to a new template and the new name is not valid, the system will default and retain the current template.</p>
Quick Grids	Valid quick grid system name	<p>Separate categories using the pipe () character.</p> <p>Can be blank.</p>
Workflow	Valid workflow system name	Can be blank.
Workflow Options	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Link to Phase	Valid phase ID within the model	<p>Used in combination with Link to Phase Name and Link to Assignment System Name to determine the stage and assignment to link to.</p> <p>All other values upload with no link.</p>
Link to Assignment System Name	Valid deliverable or activity system name	<p>Used in combination with Link to Phase Name and Link to Phase ID to determine the stage and assignment to link to.</p> <p>All other values upload with no link.</p>
Link to Assignment Type	Deliverable, Activity	All other values upload with no link.
Link to Only Publish	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Function	Valid function system name	All other values are set to None on upload.
Default Start Date Type	Manual Days Percent	All other values are set to Manual on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Default Start Date Value	Number	Leave blank if Default Start Date Type is set to Manual .
Default Deadline Type	Manual Days DaysAfterStart Percent	All other values are set to Manual on upload.
Default Deadline Value	Number	Leave blank if Default Deadline Date Type is set to Manual .
Default Finish Date Type	Manual Days DaysAfterStart Percent	All other values are set to Manual on upload.
Default Finish Date Value	Number	Leave blank if Default Finish Date Type is set to Manual .
Process Assistance URL	Any	Can be blank.
Order	Number	Is set to 0 on upload if no value is entered or the value is not a number.
Allow Version Deletion	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Allow Project Manager and Owner to Delete Activities	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Allow Not Required Status	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Allow Default Shared Ownership	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Hide Related Documents	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Disable Complete Status When No Published Version Exists	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Disable Complete Status When Quick Grid	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Required Values are Missing		
Workflow Template	Any	Can be blank.
Workflow Template System Name	Valid template system name of a Process Document template available in the Template Library	<p>The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.</p> <p>If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.</p> <p>All other values upload with no template attached.</p> <p>If updating to a new template and the new name is not valid, the system will default and retain the current template.</p>
Restricted Access User Roles	Valid user role system name	<p>Separate system roles using a semicolon (;) character.</p> <p>Can be blank.</p>
Publish On Upload	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Enforce Function on User Selection	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Configuration Access Group	Valid access group display name	<p>Separate names using the pipe () character.</p> <p>If blank, the deliverable/activity does not upload.</p>
Visibility Rule System Name	Valid conditional rule system name	All other values are set to None on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Matrix Metric Filters

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Deliverable System Name	Valid deliverable system name	Used for matching for upload. If a deliverable exists, its settings are changed with the values in the uploaded file.
Activity System Name	Valid activity system name	Used for matching for upload. If an activity exists, its settings are changed with the values in the uploaded file.
Display in Project	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Matrix System Name	Valid matrix system name	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	Must be an existing value in the matrix defined in Matrix System Name , and must be a list metric with a defined list.

Column Name	Accepted Values on Upload	Additional Notes
Filter	DisplayAndUpdateAllRows DisplayAndUpdateOnlyRowsContaining DisplayAllRowsAndUpdateOnlyRowsContaining	If blank, the filter does not upload.
Filter Value	Valid list value for the metric defined in Metric System Name	Separate values using the pipe () character. Can be blank.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Dependencies

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Source Type	Activity Deliverable	If blank, the dependency does not upload.
Source System Name	Valid activity/deliverable source system name	If blank, the dependency does not upload.
Target Type	Activity Deliverable	If blank, the dependency does not upload.
Target System Name	Valid activity/deliverable target system name	If blank, the dependency does not upload.
Dependency Type	Start-Start Start-Finish Finish-Start Finish-Finish	If blank, the dependency does not upload.

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- Process Graphic Style

Column Name	Accepted Values on Upload*	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
Phase ID	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
Stage Icon	Valid icon name	The icon assigned to the stage within the phase. Valid icon names are listed with each icon's picture when you click Icon in the Process Graphic definition page.
Stage Past Color	Valid hex color code	If left blank, defaults to #EFEFEF.
Stage Current Color	Valid hex color code	If left blank, defaults to #C9E1AC.
Stage Future Color	Valid hex color code	If left blank, defaults to #D6D6D6.
Gate Current Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the next gate. All other values upload with the default diamond shape.
Gate Current Color	Valid hex color code	If left blank, defaults to #417491.
Gate Future Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to future gates. All other values upload with the default diamond shape.
Gate Future Color	Valid hex color code	If left blank, defaults to #B0B0B0.

Column Name	Accepted Values on Upload*	Additional Notes
Gate Go Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to gates with a Go decision entered. All other values upload with the default diamond shape.
Gate Go Color	Valid hex color code	If left blank, defaults to #417491.
Gate Go Decision Badge	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a Go decision entered. All other values upload with the default Go overlay.
Gate Conditional Go Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to gates with a Conditional Go decision entered. All other values upload with the default diamond shape.
Gate Conditional Go Color	Valid hex color code	If left blank, defaults to #417491.
Gate Conditional Go Decision Badge	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a Conditional Go decision entered. All other values upload with the default Conditional Go overlay.

Column Name	Accepted Values on Upload*	Additional Notes
Gate Suspend Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon overlay assigned to gates with a Hold decision entered. All other values upload with the default diamond shape.
Gate Suspend Color	Valid hex color code	If left blank, defaults to #417491.
Gate Suspend Decision Badge	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a Hold decision entered. All other values upload with the default Hold overlay.
Gate Cancel Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the gates where a project is canceled. All other values upload with the default diamond shape.
Gate Cancel Color	Valid hex color code	If left blank, defaults to #417491.
Gate Cancel Decision Badge	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a Kill decision entered. All other values upload with the default Kill overlay.


Column Name	Accepted Values on Upload*	Additional Notes
Gate Recycle Shape	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the gates with a Recycle decision entered. All other values upload with the default diamond shape.
Gate Recycle Color	Valid hex color code	If left blank, defaults to #417491.
Gate Recycle Decision Badge	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a Recycle decision entered. All other values upload with the default Recycle overlay.

* Valid hex color codes include any combination of six characters between a and f, and 0 and 9. For example, #227755 is a shade of green, #000000 is black, and #ffff00 is yellow. The # is implied in the spreadsheet and not required in the upload.

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- Auto Gate Decision Rules

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Phase ID	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
Gate Decision Code***	Number	The number that identifies the gate decision type.

Column Name	Accepted Values on Upload	Additional Notes
		Go = 1 Kill = 2 Hold = 3 Recycle = 4 Pending Decision = 6 A Conditional Go decision cannot be set using an automated gate decision.  If you have configured your gate decision names to use different terminology, the numbers apply to the configured names that mapped to the defaults names listed above.
Metric System Name	Valid metric system name	All other values do not assign a metric condition to the gate.
Metric Value	The value the metric must be set to for the gate decision to be set.	Blank or invalid values do not set a metric condition.

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*** To set more than one metric condition per gate decision type, create additional rows using the same **Gate Decision Code**.

- Required Conditions for Go

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Phase ID	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	All other values do not assign a metric condition to restrict the gate decision to the gate.
Metric Value	The value the metric must be set to for the gate decision to be set to Go or Conditional Go.	Blank or invalid values do not set a metric condition.

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- Team Page Configuration

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Control ID	gatekeepergrid gatekeepergrid_function gatekeepergrid_gates gatekeepergrid_name	Identifies the grid and columns within each grid to assign accessibility and order attributes.

Column Name	Accepted Values on Upload	Additional Notes
	teammembergrid teammembergrid_ createstatusreports teammembergrid_function teammembergrid_name teammembergrid_primary teammembergrid_stages workflowactionownergrid workflowactionownergrid_ actions workflowactionownergrid_ function workflowactionownergrid_ name	
Accessibility	Available Unavailable	All other values are treated as Available on upload.
Order	Number	Is set to the default order if no order is provided.

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- Visibility Rules

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a condition rule exists, its settings are changed with the values in the uploaded file.
Name	Any	
Metric System Name	Valid metric system name	All other values do not assign a metric condition.
Value	String	The value the metric must equal in order to show the deliverable or activity.

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- Layout Rules

Column Name	Accepted Values on Upload	Additional Notes
Process Model System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
Layout System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
Role Name	Valid Accolade user role	Include a separate row for each role

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Importing and Exporting Migration Maps

Accolade provides Administrators and Process Designers the ability to export migration maps from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate migration maps in each environment, download the information and import it into the new environment.

The download exports the migration map configuration information into a spreadsheet file with the parts grouped into tabs.

To export migration maps:

1. From the **System** menu, select **Process > Migration Maps**.
2. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

To import migration maps into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any migration maps that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Migration Maps**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the migration maps in the spreadsheet, and adds any new migration maps with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

Migration Map Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each migration map in the order listed below. For a description of each migration map setting, see the Creating Migration Maps topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Migration Map

Column Name	Accepted Values on Upload*	Additional Notes
Migration Map System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a migration map exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new migration map is created.
Migration Map Name	Any	If blank, the migration map does not upload.
From Model	Any valid process model name	If blank, the migration map does not upload.
To Model	Any valid process model name	If blank, the migration map does not upload.
Next Gate	Any	If blank, the migration map does not upload.
Retain Project Manager	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Retain Project Access Group	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Retain Project Team	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Retain Project History	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Copy Project Links	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Close Source Project	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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Importing and Exporting Templates

Accolade provides Administrators and Process Designers the ability to export templates configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate templates in each environment, download the information and import into a different environment.

The download exports the templates configuration information into a spreadsheet file with the parts of the templates grouped into tabs.

To export template settings:

1. From the **System** menu, select **Page Design > Template Library**.

2. Select the templates that you want to download.

To narrow the list by template name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all templates, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the templates into a zip file which contains a workbook file with all of the template system details, as well as an individual file folder containing each template document, and saves it to a temporary internet files directory. Save the file to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import template settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any templates that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Page Design > Template Library**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the existing templates in the spreadsheet, and adds any new templates with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent.

This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Template Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the system settings for each template in the order listed below. For a description of each template setting, see the Adding Templates to the Template Library topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Template Details

Column Name	Accepted Values on Upload*	Additional Notes
Template System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a template exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new template is created.
Template Name	Any	If blank, the template does not upload.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the template is placed in the Default category.
Description	Any	Can be blank.
Type	Online Form Process Document Spreadsheet Report Presentation Project Plan Image PDF, Email, Other	If blank, the template does not upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Security

Column Name	Accepted Values on Upload	Additional Notes
Template System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a template exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Quick Grids

Accolade provides Administrators and Process Designers the ability to export quick grid information from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate quick grids in each environment, download the information and import into the new environment.

The download exports the quick grid configuration information into a spreadsheet file with the parts of the quick grid grouped into tabs.

To export quick grids:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. In the **Category** field, select the category containing the quick grids you want to download.

To narrow the list by quick grid name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all quick grids, select **All**.
3. Click **Download** in the top right corner of the page.

Accolade downloads the quick grids into a zip file which contains a workbook file with all of the quick grid system details, as well as an individual file folder containing any related JavaScript files, and saves it to a temporary internet files directory. Save it to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import quick grids into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any quick grids that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Page Design > Quick Grids**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the quick grids in the spreadsheet, and adds any new quick grids with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.



To upload JavaScript files, save the JavaScript file in a folder. Match the folder name with the quick grid system name, as defined in the spreadsheet file for uploading the quick grids. Save the folder and the completed upload file to a zipped folder. Upload the zipped folder to import the quick grids and JavaScript files.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Quick Grid Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each quick grid in the order listed below. For a description of quick grid settings, see the [Creating Quick Grids](#) or [Adding Software Controls and Metrics to Quick Grids](#) topics in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing [Importing and Exporting Configuration Best Practices](#) in the online help before making changes in a production environment.

- Quick Grid

The Quick Grid worksheet contains the settings for the quick grids being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new quick grid is created.
Quick Grid Name	Any	If blank, the quick grid does not upload.
Description	Any	Can be blank.
Quick Grid Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If blank, the quick grid is placed in the Default category.
Protected Grid	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Create PDF	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Publish PDF	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Grid Properties

The Grid Properties worksheet contains the settings for the individual grids being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
Quick Grid Grid Name	Any	If blank, the grid does not upload.
Grid Type	Matrix Standard	If blank, the grid does not upload.
Matrix System Name	Valid matrix system name	If Grid Type is selected as Matrix , enter a valid matrix system name. Otherwise, leave blank.
Number of Columns	Any number	The number of columns in the grid. If blank, the grid does not upload.
Number of Rows	Any number	The number of rows in the grid. If blank, the grid does not upload.
Rank	Any number	The order of the individual grids within the quick grid. If blank, the grid does not upload.
Tooltip	Any	Can be blank.
Show Grid Title	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Hide Grid	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Collapsible	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Default To	Collapsed Expanded	If blank, defaults to Expanded .
Background Color	Valid hex color code	If blank, defaults to color code #ffffff.

Column Name	Accepted Values on Upload*	Additional Notes
Border Style	None Dotted Dashed Solid Double Groove Ridge Inset Outset	If blank, defaults to None .
Border Width	Valid pixel values	If blank, defaults to 1 .
Border Color	Valid hex color code	If blank, defaults to color code #ededed.

* For any column that accepts **Yes**, **Y**, **True**, **1**, or **X**, you can also enter **No**, **N**, **False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes**, **Y**, **True**, **1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Columns

Column Name	Accepted Values on Upload	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
Column	Any number	The column number must be less than or equal to the number of columns defined in the quick grid. If blank, the grid does not upload.
Minimum Width	Any number	Can be blank.
Fixed Width	Any number	Can be blank.

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- Rows

Column Name	Accepted Values on Upload	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
Row	Any number	The row number must be less than or equal to the number of rows defined in the quick grid. If blank, the grid does not upload.
Minimum Height	Any number	Can be blank.
Fixed Height	Any number	Can be blank.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Cell Properties

The Cell Properties worksheet contains the settings for the individual cells being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Cell System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new cell is created.
Quick Grid Column	Any number	The cell's column location within the grid. If blank, the cell does not upload.
Quick Grid Row	Any number	The cell's row location within the grid. If blank, the cell does not upload.
Column Span	Any number	If a merged cell, the number of columns that the cell spans. If blank, defaults to 1 .
Row Span	Any number	If a merged cell, the number of rows that the cell spans. If blank, defaults to 1 .
Control Type	Aggregate Button Checkbox CheckboxGroup ComboBox DateInput DropDownBox EmailTextBox FormattedText ListBox MetricLabel MultilineTextBox NumericTextBox PairedListBox RadioButtonGroup RelativeDate RichText TemplateImage TextBox UserSelector	If Aggregate , Button , FormattedText , or TemplateImage are selected, the Source Type should be defined as LocalElement . If blank, the cell does not upload.
Source Type	LocalElement Metric Metadata Nothing	If Aggregate , Button , FormattedText , or TemplateImage are selected as the Control Type , this must be defined as LocalElement . If blank, the cell does not upload.
Metadata	Valid metadata system name	If Source Type is selected as Metadata , enter the metadata system name.

Column Name	Accepted Values on Upload*	Additional Notes
		Otherwise, leave blank.
Default Value	Any	Can be blank.
Tooltip	Any	Can be blank.
List Source	Any	Separate each list option by a pipe () character.
Empty Item Text	Any	Can be blank.
Control Width	Valid pixel values	If blank, defaults to None .
Sort	Ascending Descending NoSorting	If blank, defaults to No Sorting .
Enable Markdown	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Link To	None Layout Project Page URL	If blank, defaults to None .
Link To Destination	Valid link address	Can be blank.
Link To Index	Any number, up to 10 digits	Can be blank.
Open in New Tab	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Metric Data Type	Valid metric data type	If Source Type is selected as Metric , enter the metric's data type. Otherwise leave blank.
Metric System Name	Valid metric system name	If Source Type is selected as Metric , enter the metric's system name. Otherwise leave blank.
Size	Any number	If blank, defaults to 0 .
Max Length	Any number	If blank, defaults to 0 .
Prefix	Any	Can be blank.
Suffix	Any	Can be blank.
Allow Negative	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Read Only	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Required	Yes, Y, True, 1, X*	All other values are treated as No on upload.
User Roles	Valid Accolade user role	Separate each role by a pipe () character.
Text	Any	Can be blank.
Rows	Any number	If blank, defaults to 0 .
Columns	Any number	If blank, defaults to 0 .
Project Image Content	Valid image file in Accolade	Can be blank.
Template Image Content	Valid image file in Accolade	Can be blank.
Show Remaining Character Count	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Inline Editing	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Font	Valid font name	If blank, defaults to Noto Sans.
Font Size	Valid pixel values	If blank, defaults to pixel size 13.
Bold	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Italic	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Underline	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Text Color	Valid hex color code	If blank, defaults to color code #404040.
Alignment	Left Center Right Top Center Bottom	Separate each alignment selection with a pipe () character. If blank, defaults to Left Top alignment.
Background Color	Valid hex color code	If blank, defaults to #ffffff.

Column Name	Accepted Values on Upload*	Additional Notes
Border Style	None Dotted Dashed Solid Groove Ridge Inset Outset	If blank, defaults to None .
Border Width	Valid pixel values	If blank, defaults to no border/none.
Border Color	Valid hex color code	If blank, defaults to no border/none.
Tooltip Alignment	Top Middle Bottom	If blank, defaults to Middle alignment.

* For any column that accepts **Yes**, **Y**, **True**, **1**, or **X**, you can also enter **No**, **N**, **False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes**, **Y**, **True**, **1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Text Conditions

The Text Conditions worksheet contains the conditional text settings for the individual cells being uploaded or downloaded. If the quick grid does not have conditional text settings, this worksheet can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Cell System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.
RGB	Valid hex color code	If blank, the condition does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
Compare Type	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
Value	Any	If blank, the condition does not upload.

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- **Border Conditions**

The Border Conditions worksheet contains the settings for the individual cells being uploaded or downloaded. If the quick grid does not have conditional border settings, this worksheet can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Cell System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.
RGB	Valid hex color code	If blank, the condition does not upload.
Compare Type	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
Value	Any	If blank, the condition does not upload.

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- **Background Conditions**

The Background Conditions worksheet contains the settings for the individual cells being uploaded or downloaded. If the quick grid does not have conditional background settings, this

worksheet can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
Quick Grid Cell System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.
RGB	Valid hex color code	If blank, the condition does not upload.
Compare Type	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
Value	Any	If blank, the condition does not upload.

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- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
Quick Grid System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

* For any column that accepts **Yes**, **Y**, **True**, **1**, or **X**, you can also enter **No**, **N**, **False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes**, **Y**, **True**, **1**, or **X** are treated as **No** when you upload the spreadsheet.

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Importing Matrix Grids

Matrix grids will be included in the import or export data; however, the matrix and its metrics are not imported or exported with the quick grid. You will need to import the matrix and its metrics on the import server before importing the quick grid. The matrix and metrics should have the same system names as they had on the export server.

If a matrix grid is imported onto a server that does not have the matrix or metrics loaded, the metrics are removed from the grid cells. You will need to re-associate them with the grid columns after the matrix and metrics are created on the import server.

Notes:

- Before importing a quick grid, make sure that all related metrics have been imported. A quick grid's metrics are not imported along with the grid, so the metrics must be imported independently.

Importing and Exporting Workflows

Accolade provides Administrators and Process Designers the ability to export workflows from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate workflows in each environment, download the information and import it into the new environment.

The download exports the workflow configuration information into a spreadsheet file with the parts grouped into tabs.

To export workflows:

1. From the **System** menu, select **Collaboration & Groups > Workflows**.
2. Select the workflows that you want to download.

To narrow the list by workflow name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

3. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import workflows into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any workflows that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Collaboration & Groups > Workflows**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the workflows in the spreadsheet, and adds any new workflows with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Workflow Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each workflow in the order listed below. For a description of each workflow setting, see the Creating Workflows topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Details

Column Name	Accepted Values on Upload*	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new workflow is created.
Workflow Name	Any	If blank, the workflow does not upload.
Description	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the workflow is placed in the Default category.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Users cannot own multiple actions	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload. The workflow cannot be deleted if in use.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- **Start Conditions**

Start conditions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new start condition requirements, enter the new information to upload.
- If the workflows have existing start condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have start condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	If blank, the start condition requirement does not upload. 💡 Start condition requirements can include multiple metrics. Enter a separate row for each metric being added.

Column Name	Accepted Values on Upload	Additional Notes
Metric Value	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the start condition requirement does not upload.

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- Migration Map Rules

Migration maps are optional when importing workflows. The worksheet must be included in the spreadsheet file, but can be left blank if the workflows do not have migration map requirements.

Column Name	Accepted Values on Upload*	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Rule System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new rule is created.
Rule Name	Any	If blank, the rule does not upload.
Map System Name	Valid migration map system name	If blank, the rule does not upload.

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- Migration Map Rule Conditions

Migration maps are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new migration map condition requirements, enter the new information to upload.
- If the workflows have existing migration map condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have migration map condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Rule System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new rule is created.
Map System Name	Valid migration map system name	If blank, the migration map condition requirement does not upload.
Metric System Name	Valid metric system name	If blank, the migration map condition requirement does not upload. 💡 Migration map condition requirements can include multiple metrics. Enter a separate row for each metric being added.
Metric Value	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the migration map condition requirement does not upload.

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- Steps

Column Name	Accepted Values on Upload*	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Step System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new step is created. 💡 The Step and Automated Step system names must be unique within their

Column Name	Accepted Values on Upload*	Additional Notes
		💡 related workflow.
Step Name	Any	If blank, the step does not upload.
Proceed after 1 decision	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Order	Any number	<p>The field is set to 0 on upload if no value is entered or the value is not a number.</p> <p>💡 The Step and Automated Steps order values must be unique within their related workflow.</p>

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Action

Column Name	Accepted Values on Upload*	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	<p>Used for matching for upload.</p> <p>If a workflow exists, its settings are changed with the values in the uploaded file.</p>
Action System Name	Alphanumeric characters, underscore**	<p>Used for matching for upload.</p> <p>If a workflow step exists, its settings are changed with the values in the uploaded file.</p> <p>If a new, unique system name exists in the file when uploaded, a new action is created.</p>
Action Name	Any	If blank, the action does not upload.
Step System Name	Alphanumeric characters, underscore**	<p>Used for matching for upload.</p> <p>If a step exists, its settings are changed with the values in the uploaded file.</p>
Description	Any	Can be blank.
Function	Valid function system name	<p>If Function is defined, Enforce on User Selection should be set to Yes.</p> <p>Can be blank.</p>
Enforce On User Selection	Yes, Y, True, 1, X*	<p>If Yes is selected, Function must be defined.</p> <p>All other values are treated as No on upload.</p>

Column Name	Accepted Values on Upload*	Additional Notes
Owner	Valid Accolade user	Can be blank.
Permissions	Can Approve Can Edit Can Edit and Publish	If blank, the action does not upload.
Can Skip	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Auth Req	Yes, Y, True, 1, X*	All other values are treated as No on upload.
# Days	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.


* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Action Conditions

Action conditions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new action condition requirements, enter the new information to upload.
- If the workflows have existing action condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have action condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Step System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.
Action System Name	Alphanumeric characters, underscore**	Used for matching for upload. If an action exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	If blank, the action condition requirement does not upload.  Action condition requirements can

Column Name	Accepted Values on Upload	Additional Notes
		💡 include multiple metrics. Enter a separate row for each metric being added.
Metric Value	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the action condition requirement does not upload.

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- Automated Step

Automated steps are optional when importing workflows. The worksheet must be included in the spreadsheet file, but can be left blank if the workflows do not have automated steps.

Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Step System Name	Alphanumeric characters, underscore**	Used for matching for upload. If an automated step exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new automated step is created. 💡 The Step and Automated Step system names must be unique within their related workflow.
Step Name	Any	If blank, the step does not upload.
Automated Action System Name	Alphanumeric characters, underscore**	Used for matching for upload. If an automated action exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new automated action is created.
Automated Action Type	CreatePDF PublishLatestDocumentVersion SetGateDate SetGateDecision	If blank, the automated action does not upload.
Template Source	DeliverableTemplate WorkflowTemplate	If Automated Action Type is selected as CreatePDF , a value must be entered. Use DeliverableTemplate as the template source for both deliverables and activities. Otherwise leave blank.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number. 💡 The Step and Automated Steps order must be unique within their related workflow.

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- Automated Action Conditions

Automated action conditions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new automated action condition requirements, enter the new information to upload.
- If the workflows have existing automated action condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have automated action condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
Step System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	If blank, the automated action condition requirement does not upload. 💡 Automated action condition requirements can include multiple metrics. Enter a separate row for each metric being added.
Metric Value	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the automated action condition requirement does not upload.

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- Automated Gate Decision Rules

Automated gate decisions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new automated gate decision condition requirements, enter the new information to upload.
- If the workflows have existing automated gate decision condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have automated gate decision condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Step System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
Automated Gate Decision Rule	Go Kill Hold Recycle Pending Decision	If Automated Action Type on the Automated Step worksheet is selected as SetGateDecision , a value must be entered. Otherwise leave blank.
Metric System Name	Valid metric system name	If blank, the decision rule condition requirement does not upload.
Metric Value	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the decision rule condition requirement does not upload.

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- Access Groups


Column Name	Accepted Values on Upload	Additional Notes
Workflow System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

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Importing and Exporting Layouts

Accolade provides Administrators and Process Designers the ability to export layouts from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate layouts in each environment, download the information and import it into the new environment.

The download exports the layout configuration information including all pods and layout settings into a spreadsheet file with the parts grouped into tabs.

 When importing layouts into Accolade, the thumbnail image for a layout displays with the message "No Image Available." All updated pods and layout settings are saved. Click to edit the layout to view the pods and settings. Saving and closing the layout regenerates a corresponding thumbnail image.

To export layout settings and pods:

1. From the **System** menu, select **Page Design > Layouts**.

2. Select the layouts that you want to download.

To narrow the list by layout name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all layouts, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the layouts into a zip file which contains a workbook file with all of the layout system details, as well as an individual file folder containing any related JavaScript and HTML files, and saves it to a temporary internet files directory. Save the file to a more accessible location.


Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import layout settings and pods into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any layouts that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Page Design > Layouts**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the existing layouts in the spreadsheet, and adds any new layouts with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

 To upload JavaScript files and HTML files, save the JavaScript or HTML file in a folder. Match the folder name with the Advanced Platform pod system name, as defined in the spreadsheet file for uploading the layouts and pods. Save the folder and the completed upload file to a zipped folder. Upload the zipped folder to import the layouts and pods, and JavaScript and HTML files to their associated Advanced Platform pods.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Layout Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each layout in the order listed below. For a description of layout settings and pod types, see the [Creating Page Layouts](#) and/or [Available Pod Types](#) topics in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing [Importing and Exporting Configuration Best Practices](#) in the online help before making changes in a production environment.

- Layouts

The Layouts worksheet contains the settings for the layouts being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new layout is created.
Display Name	Any	If blank, the layout does not upload.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If blank, the layout is placed in the Default category.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.

Column Name	Accepted Values on Upload*	Additional Notes
Project Header Visible	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Process Graphic Visible	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Horizontal Alignment	Left Center Right	If blank, the layout uploads with the default of Left .
Background Color	Valid hex color code	Can be blank and defaults to color code #ffffff.
Margin Color	Valid hex color code	Can be blank and defaults to color code #ffffff.
Page Width	Valid pixel values	Can be blank in which the layout uploads with the default of left aligned.
Icon	Valid alphanumeric icon id	If blank, the layout does not upload. Icon id value displays in icon selection dialog when creating layouts .
Has Master Button	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Layout Filters	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Fill Remaining Height	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Add to New Gated Process Models	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Add to New Non-Gated Process Models	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Add to New Idea Process Models	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available To Mobile	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Hide Action Menu	Yes, Y, True, 1, X*	Applies to idea models only. All other values are treated as No on upload.
Generate Global Link	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Configuration Access Groups	Valid access group display name	Separate each access group name using the pipe () character.
Layout Cycles	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Icon Color	Valid hex color codes: #932121, #C76614, #10611E, #36297B, #A21E79, #417491 (blue, default)	All other values including blank are treated as #417491 on upload.
Hide Hierarchy	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Pods

The Pods worksheet includes the individual pods and pod settings within the layouts being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
Layout System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
System Name	Valid pod-specific system name	Used for matching on upload. If a pod exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new pod is created and added to the layout.
Name	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
Type	AdvancedPlatform Buttons Chart Documents Gates GlobalLinks HTMLReport Metric PlanningView Plugin PortfolioOptimization Productivity ProjectImage ProjectInformation QuickGrids Report ReportGroups TemplateImage Voting	<p>If a layout contains the Advanced Platform pod, Accolade downloads the JavaScript files and HTML files in individual file folder along with the spreadsheet file.</p> <p>Long string metrics with the Rich Text check box enabled are not supported in pods and cannot be imported.</p> <p>Can be blank.</p>
Content	Valid pod content name	<p>Do not include spaces between words and the content must be appropriate for the pod Type.</p> <p>Can be blank.</p>
X	Integer value greater than or equal to 0	<p>Determines where the pod displays horizontally in the layout.</p> <p>Coordinates (0,0) correlate to the top left corner of the layout.</p>
Y	Integer value greater than or equal to 0	<p>Determines where the pod displays vertically in the layout.</p> <p>Coordinates (0,0) correlate to the top left corner of the layout.</p>
Height	Integer value greater than 0	If blank or invalid, the pod does not upload.
Width	Integer value greater than 0	If blank or invalid, the pod does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
Advanced Settings	A valid expression	<p>Applies to pods with advanced settings.</p> <p>For example, note a Data Form pod with Project Name, Project ID, and Description selected and one column defined in the advanced settings as follows:</p> <pre>{ "Columns": 1, "Items": [{ "Order": null, "IsReadOnly": false, "ObjectTypeID": 2, "SystemName": "ProjectName" }, { "Order": null, "IsReadOnly": false, "ObjectTypeID": 2, "SystemName": "Description" }, { "Order": null, "IsReadOnly": false, "ObjectTypeID": 2, "SystemName": "ProjectId" }] }</pre> <p>If the expression is invalid, the row does not upload.</p>
Plugin Type	Valid configured plugin name	This setting only applies for pods containing plugins.
Filter To Project	Yes, Y, True, 1, X*	<p>This setting only applies to global link and planning view pods.</p> <p>All other values are treated as No on upload.</p>
Title		
Text Alignment	left right center	If blank, the pod uploads with the default of left aligned.
Font Color	Valid hex color code	If blank, defaults to color code #ffffff.
Font Size	Valid pixel values	If blank, defaults to a pixel size 11.
Content		
Font Color	Valid hex color code	If blank, defaults to color code #ffffff.
Font Size	Valid pixel values	If blank, defaults to a pixel size 11.
Background Color	Valid hex color code	If blank, defaults to color code #ffffff.
Vertical Bar color	Valid hex color code	If blank, defaults to color code #054353.

Column Name	Accepted Values on Upload*	Additional Notes
Border		
Size	Valid pixel values	If blank, defaults to a pixel size 11.
Style	none dotted dashed solid groove ridge inset outset	If blank, defaults to solid.
Color	Valid hex color code	If blank, defaults to color code #ffffff.
Allow Maximization	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Comparison Set System Name	Valid comparison set system name	Can be blank.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Comparison Set

The Comparison Set worksheet includes the comparison set settings within the layouts being uploaded or downloaded. This worksheet must be included in the spreadsheet file, but can be left blank if the layouts do not include comparison sets.

Column Name	Accepted Values on Upload*	Additional Notes
Layout System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
Comparison Set System Name	Valid comparison set system name	Used for matching on upload. If a pod exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new set is created and added to the layout.
Comparison Set Name	Any	If blank, the set does not upload.

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Importing and Exporting Reference Tables

Accolade provides Administrators and Process Designers the ability to export reference tables configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate reference tables in each environment, download the information and import into a different environment.

The download exports the reference tables configuration information into a spreadsheet file with the parts of the templates grouped into tabs.

To download reference table settings:

1. From the **System** menu, select **Content Sources > Reference Tables**.
2. Select the reference tables you want to download.

To narrow the list by reference table name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all reference tables, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the reference tables into a zip file which contains a workbook file with all of the reference table system details, as well as an individual file folder containing each reference table spreadsheet, and saves it to a temporary internet files directory. Save the file to a more accessible location.

Note: The individual reference table spreadsheets **ONLY** contain column information required for the table configuration. The reference table data files must be downloaded and moved to the new environment manually.

To import reference table settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reference tables that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Reference Tables**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the existing reference tables in the spreadsheet, and adds any new reference tables with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Reference Table Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the system settings for each reference table in the order listed below. For a description of each reference table setting, see the Adding Reference Tables topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Reference Table

Column Name	Accepted Values on Upload*	Additional Notes
Reference Table System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new reference table is created.
Reference Table Display Name	Any	If blank, the reference table does not upload.
Unique Values in First Column	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Description	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the reference table is placed in the Default category.
Owner	Valid user system ID	Use the format <i>(domain)\(user name)</i> without the parentheses. If blank, the owner defaults to None .
Access Group	Valid access group system name	Include a separate row for each access group.
Available to Metrics	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Reporting	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Portfolio Optimizer	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Maximum Number of Versions	Any number	If blank, defaults to unlimited.
Enable Automatic Loading	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Automatic Load Schedule Hours	Valid hour in 24-hour time format	If Enable Automatic Loading is defined as Yes , a value can be entered or this field can be left blank. If blank, defaults to Load immediately . If Enable Automatic Loading is defined as No , leave blank.
Automatic Load Schedule Minutes	Valid minutes in 24-hour time format	If Enable Automatic Loading is defined as Yes , a value can be entered or this field can be left blank. If blank, defaults to Load immediately . If Enable Automatic Loading is defined as No , leave blank.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Column Definition

Column Name	Accepted Values on Upload	Additional Notes
Reference Table System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file.
Column System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a column exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new reference table is created.
Column Display Name	Any	Used for matching in the upload.
Number Format	Alphanumeric characters	Can be blank.

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- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
Reference Table System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

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Importing and Exporting Access Groups

Accolade provides Administrators and Process Designers the ability to export access groups from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate access groups in each environment, download the information and import it into the new environment.

The download exports the access groups configuration information into a spreadsheet file with the parts grouped into tabs.

To export access groups:

1. From the **System** menu, select **Collaboration & Groups > Access Groups**.
2. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

To import access groups into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any access groups that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Collaboration & Groups > Access Groups**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the access groups in the spreadsheet, and adds any new access groups with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

Access Groups Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each access group in the order listed below. For a description of each access group setting, see the Creating Access Groups topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Access Group

Column Name	Accepted Values on Upload*	Additional Notes
Access Group System Name	Alphanumeric characters, underscore**	Used for matching for upload. If an access group exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new access group is created.
Access Group Name	Any	If blank, the access group does not upload.
Parent Access Group System Name	Any	If blank, the access group does not upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Security Profiles

Accolade provides Administrators and Process Designers the ability to export security profiles from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate security profiles in each environment, download the information and import it into the new environment.

The download exports the security profiles configuration information into a spreadsheet file with the parts grouped into tabs.

To export security profiles:

1. From the **System** menu, select **System > Security Profiles**.
2. Select the security profiles you want to download.

To narrow the list by category, select a category to display in the **Category** list. To download all security profiles, select **All**.

3. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

To import security profiles into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any security profiles that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **System > Security Profiles**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the security profiles in the spreadsheet, and adds any new security profiles with unique system names.
5. *(Optional)* Click **Print** to print the import results for your records.

Security Profiles Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each security profile in the order listed below. For a description of each security profile setting, see the Creating Security Profiles topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Security Profile Summary

Column Name	Accepted Values on Upload*	Additional Notes
Security Profile System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a security profile exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new security profile is created.
Security Profile Name	Any	If blank, the security profile does not upload.
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.
Visible	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Classes

Column Name	Accepted Values on Upload*	Additional Notes
Security Profile System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a security profile exists, its settings are changed with the values in the uploaded file.
Class	Valid class system name	Include separate row for each class. To allow access to all classes, leave this worksheet blank.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Metrics

Column Name	Accepted Values on Upload*	Additional Notes
Security Profile System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a security profile exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	Must be a List, Multi-Select List, or String type and be associated with at least one model in a class selected in the security profile.
Metric Value	Any	
Metric Extended Access	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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Importing and Exporting Functional Areas and Functions

Accolade provides Administrators and Process Designers the ability to export functional areas and functions configuration from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate functional areas and functions in each environment, download the information and import it into the new environment.

The download exports the functional areas and functions configuration information into a spreadsheet file with the parts of the functions grouped into tabs.

To export functional areas and functions:

1. From the **System** menu, select **Collaboration & Groups > Functions**.
2. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import functional areas and functions into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any functional areas and functions that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Collaboration & Groups > Functions**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the functional areas and functions in the spreadsheet, and adds any new functional areas and functions with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Functional Areas and Functions Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each functional area and function in the order listed below. For a description of each function setting, see the Creating Functional Areas and Functions topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Functional Areas

Column Name	Accepted Values on Upload*	Additional Notes
Functional Area System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a functional area exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new functional area is created.
Function Area Name	Any	If blank, the functional area does not upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Delete Functional Area	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Functions

Column Name	Accepted Values on Upload*	Additional Notes
Functional Area System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a functional area exists, its settings are changed with the values in the uploaded file.
Function System Name	Alphanumeric characters, underscore**	Must be unique. If blank, the function does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
Function Name	Any	If blank, the function does not upload
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Merge To Functional System Name	Alphanumeric characters, underscore**	Used for merging functions. Enter the system name of the function being merged <i>to</i> .
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
Function System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a function exists, its settings are changed with the values in the uploaded file.
Access Groups	Valid access group system name	Include a separate row for each access group.

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- Members

Column Name	Accepted Values on Upload	Additional Notes
Function System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a function exists, its settings are changed with the values in the uploaded file.
Members	Valid user system ID	Use the format <i>(domain)\(login name)</i> without the parentheses. Include a separate row for each member.

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Importing and Exporting Accolade Charts

Accolade provides Administrators and Process Designers the ability to export charts settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate online charts in each environment, download the information and import into a different environment.

The download exports the chart configuration information into a spreadsheet file with the parts of the charts grouped into tabs.

To export chart settings:

1. From the **System** menu, select **Content Source > Charts & Reports Manager**.
2. Select the charts and reports that you want to download.

To narrow the list by chart name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. Charts settings are downloaded to a workbook titled CHART_Workbook.xlsx and reports are downloaded separately in a workbook titled RPT_Workbook.xlsx. Save the file to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import chart settings into Accolade:

Important! In order to successfully import a chart, the report source the chart is built upon must exist in the environment prior to upload.

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any charts that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Source > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'CHART_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing charts in the spreadsheet, and adds any new charts with unique system names.

7. (Optional) Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Chart Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each chart in the order listed below. For a description of each chart setting, see the individual chart topic links in the Creating Charts from Report Data Overview topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- General Settings

The General Settings worksheet contains the settings for all charts being imported. The columns correlate to the specific chart configuration fields upon chart creation.

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new chart is created.
Name	Any	If blank, the chart does not upload.
Chart Type	Sopheon.Accolade.Models.Domain.Charts.BarChart Sopheon.Accolade.Models.Domain.Charts.BubbleChart Sopheon.Accolade.Models.Domain.Charts.GroupedBarChart Sopheon.Accolade.Models.Domain.Charts.LineChartByColumns Sopheon.Accolade.Models.Domain.Charts.LineChartTrends Sopheon.Accolade.Models.Domain.Charts.PieChart Sopheon.Accolade.Models.Domain.Charts.StackedBarChart Sopheon.Accolade.Models.Domain.Charts.RadarChart	If blank, the chart does not upload.
Report Source	Valid online report system name	If blank, the chart does not upload.
Display Title	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Category	Alphanumeric characters	<p>If a new, unique category name exists in the file when uploaded, a new category is created.</p> <p>If left blank, the chart is placed in the Default category.</p>
Description	Any	Can be blank.
Owners	Valid user system ID	<p>Use the format <i>(domain)\(user name)</i> without the parentheses. Separate each additional owner with a pipe () character.</p> <p>If blank, the chart does not upload.</p>
Roles	Valid Accolade user role	<p>Separate each role with a pipe () character.</p> <p>Can be blank.</p>

Column Name	Accepted Values on Upload*	Additional Notes
Available to Charts & Reports	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Configuration	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Bar Chart

The Bar Chart worksheet contains the settings for the bar charts being imported. The columns correlate to the specific [bar chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Grouping	Valid report column system name	If blank, the chart does not upload.
Display Grouping Axis Label	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Bar	Valid report column system name	If blank the chart does not upload.
Display Bar Axis Label	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Show Grid Lines	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Display Type	Vertical Horizontal	If blank, the value defaults to Vertical on upload.
Rotate Horizontal Axis Text	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.
Target Line Report Source	Valid online report system name	Can be blank.
Target Line Report Key	Valid report column system name	Can be blank.
Target Line Report Value	Valid report column system name	Can be blank.
Number Format Horizontal	#, (#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to #, (#) on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Axis		
Number Format Bars	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed. If blank, the value defaults to #;(##) on upload.
Display Totals	Vertical Horizontal	Can be blank.

* For any column that accepts **Yes**, **Y**, **True**, **1**, or **X**, you can also enter **No**, **N**, **False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes**, **Y**, **True**, **1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Pie Chart

The Pie Chart worksheet contains the settings for the pie charts being imported. The columns correlate to the specific [pie chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Slice Represents	Valid report column system name	If blank, the chart does not upload.
Slice Size	Valid report column system name	If blank, the chart does not upload.
Slice Name	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Slice Value	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Slice Percentage	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Doughnut	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Exploded	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Number Format	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.

* For any column that accepts **Yes**, **Y**, **True**, **1**, or **X**, you can also enter **No**, **N**, **False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes**, **Y**, **True**, **1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Bubble Chart

The Bubble Chart worksheet contains the settings for the bubble charts being imported. The columns correlate to the specific [bubble chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Horizontal Axis	Valid report column system name	If blank, the chart does not upload.
Display Horizontal Axis Label	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Show Horizontal Grid Lines	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Rotate Horizontal Axis Text	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Horizontal Axis Scale	Automatic Custom	If blank, defaults to Automatic .
Horizontal Axis Range Min	Any number	If Horizontal Axis Scale is defined as Custom , enter a value for the chart range minimum value. Otherwise leave blank.
Horizontal Axis Range Max	Any number	If Horizontal Axis Scale is defined as Custom , enter a value for the chart range maximum value. Otherwise leave blank.
Vertical Axis	Valid report column system name	If blank, the chart does not upload.
Display Vertical Axis Label	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Show Vertical Grid Lines	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Vertical Axis Scale	Automatic Custom	If blank, defaults to Automatic .

Column Name	Accepted Values on Upload*	Additional Notes
Vertical Axis Range Min	Any number	If Vertical Axis Scale is defined as Custom , enter a value for the chart range minimum value. Otherwise leave blank.
Vertical Axis Range Max	Any number	If Vertical Axis Scale is defined as Custom , enter a value for the chart range maximum value. Otherwise leave blank.
Bubble Size	Valid report column system name	If blank, the chart does not upload.
Bubble Represents	Valid report column system name	Can be blank.
Bubble Color	Valid report column system name	Can be blank.
Bubble Opacity	0.1 0.2 0.3 0.4 0.5 0.6 07 0.8 0.9	If blank, the chart does not upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5 All the same color	If blank, the value defaults to Theme 1 on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.
Number Format Horizontal Axis	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.
Number Format Vertical Axis	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.
Number Format Bubble Size	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the bubble's tooltips are displayed. If blank, the value defaults to #;(##) on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Grouped Bar Chart

The Grouped Bar Chart worksheet contains the settings for the grouped bar charts being imported. The columns correlate to the specific [grouped bar chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Horizontal Column	Valid report column system name	If blank, the chart does not upload.
Display Grouping Label Horizontal	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Bars	Valid report column system name	Separate each additional bar with a pipe () character. If Vertical Column has a value, then only one bar segment allowed. If blank, the chart does not upload.
Bar Axis Units	Any	Can be blank.
Display Type	Vertical Horizontal	If blank, the value defaults to Vertical on upload.
Rotate Horizontal Axis Text	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Number Format Bars	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed. If blank, the value defaults to #;(##) on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Target Line Report Source	Valid online report system name	Can be blank.
Target Line Report Key	Valid report column system name	Can be blank.
Target Line Report Value	Valid report column system name	Can be blank.
Vertical Column	Valid report column system name	Can be blank.
Display Grouping Label Vertical	Yes, Y, True, 1, X*	Can be blank.
Number Format Horizontal Axis	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.
Number Format Vertical Axis	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Stacked Bar Chart

The Stacked Bar Chart worksheet contains the settings for the stacked bar charts being imported. The columns correlate to the specific [stacked bar chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Horizontal Column	Valid report column system name	If blank, the chart does not upload.
Display Axis Label	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Horizontal		
Bar Segments	Valid report column system name	Separate each bar with a pipe () character. If Vertical Column has a value, then only one bar segment allowed. If blank, the chart does not upload.
Stacked to 100%	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Display Totals	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Bar Axis Units	Any	Can be blank.
Display Type	Vertical Horizontal	If blank, the value defaults to Vertical on upload.
Rotate Horizontal Axis Text	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Number Format Bars	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed. If blank, the value defaults to #;(##) on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.
Target Line Report Source	Valid online report system name	Can be blank.
Target Line Report Key	Valid report column system name	Can be blank.
Target Line Report Value	Valid report column system name	Can be blank.
Vertical Column	Valid report column system name	Can be blank.
Display Axis Label Vertical	Yes, Y, True, 1, X*	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
Number Format Horizontal Axis	#;(#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(#) on upload.
Number Format Vertical Axis	#;(#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(#) on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Radar Chart

The Radar Chart worksheet contains the settings for the radar charts being imported. The columns correlate to the specific [radar chart configuration fields](#).

Column Name	Accepted Values on Upload	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Polygons	Valid report column system name	If blank, the chart does not upload.
Spokes	Valid report column system name	Separate each spoke with a pipe () character. If blank, the chart does not upload.
Spoke Axis Scale	Automatic Custom	If blank, defaults to Automatic .
Spoke Axis Range Min	Any number	If Spoke Axis Scale is defined as Custom , enter a value for the chart range minimum value. Otherwise leave blank.
Spoke Axis Range Max	Any number	If Spoke Axis Scale is defined as Custom , enter a value for the chart range maximum value. Otherwise leave blank.
Number Format	#;(#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(#) on upload.

Column Name	Accepted Values on Upload	Additional Notes
Style	Lines Only Lines and Fill Fill Only	If blank, the value defaults to Lines Only on upload.
Opacity	0.1 0.2 0.3 0.4 0.5 0.6 07 0.8 0.9 1	If Lines Only is selected as the style, set the opacity to 1 on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.

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- Line Chart by Columns Chart

The Line Chart by Columns Chart worksheet contains the settings for the line charts being imported. The columns correlate to the specific [line chart by columns chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Lines	Valid report column system name	If blank, the chart does not upload.
Horizontal Axis Title	Alphanumeric characters	Can be blank.
Show Horizontal	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Grid Lines		
Columns	Valid report column system name	Separate column names using a pipe () character. If blank, the chart does not upload.
Vertical Axis Title	Alphanumeric characters	Can be blank.
Show Grid Lines	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Rotate Horizontal Axis Text	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Display Point Marker	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Style	Lines Only Lines and Fill Fill Only	If blank, the value defaults to Lines Only on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.
Number Format Horizontal Axis	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.
Number Format Vertical Axis	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Line Chart Trends Chart

The Line Chart Trends Chart worksheet contains the settings for the line series charts being imported. The columns correlate to the specific [line chart trends chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
Horizontal Axis Label	Alphanumeric characters	Can be blank.
Rotate Horizontal Axis Text	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Show Horizontal Grid Lines	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Start at Zero	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Horizontal Number Format	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.
Horizontal Axis Columns	Valid report column system name	If blank, the chart does not upload.
Vertical Axis Label	Alphanumeric characters	Can be blank.
Show Vertical Grid Lines	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Vertical Number Format	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to #;(##) on upload.
Vertical Axis Columns	Valid report column system name	Separate column names using a pipe () character. If blank, the chart does not upload.
Group By Columns	Valid report column system name	Separate column names using a pipe () character. If blank, the chart does not upload.
Display Point Marker	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Line Style	Lines Only Lines and Fill Fill Only	If blank, the value defaults to Lines Only on upload.
Legend	None Right Left	If blank, the value defaults to None on upload.
Color Theme	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to Theme 1 on upload.

* For any column that accepts **Yes**, **Y**, **True**, **1**, or **X**, you can also enter **No**, **N**, **False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes**, **Y**, **True**, **1**, or **X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Access Groups

The Access Groups worksheet includes the access groups for the charts being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
Chart System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a chart exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

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- Cycles

The Cycles worksheet includes the chart cycles for the charts being uploaded or downloaded. The columns correlate to [specific chart types](#) to cycle through.

Column Name	Accepted Values on Upload	Additional Notes
Chart System Name	Alphanumeric characters, underscore**	Used for matching for upload.

Column Name	Accepted Values on Upload	Additional Notes
		<p>If a chart exists, its settings are referenced in the uploaded file.</p> <p>If blank, no cycles upload.</p>
Chart Type	Sopheon.Accolade.Models.Domain.Charts.BarChart Sopheon.Accolade.Models.Domain.Charts.BubbleChart Sopheon.Accolade.Models.Domain.Charts.GroupedBarChart Sopheon.Accolade.Models.Domain.Charts.LineChartTrends Sopheon.Accolade.Models.Domain.Charts.PieChart Sopheon.Accolade.Models.Domain.Charts.StackedBarChart	<p>If blank, the referenced chart does not upload.</p>
Cycles	References columns in the charts that are designated as a cycle.	<p>Used for matching for upload.</p> <p>If chart settings exist, the referenced chart is in the upload file.</p> <p>If blank, no cycles upload.</p>

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Importing and Exporting HTML Reports

Accolade provides Administrators and Process Designers the ability to export HTML reports settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate HTML reports in each environment, download the information and import into a different environment.

The download exports the HTML reports configuration information into a spreadsheet file with the parts of the reports grouped into tabs.

To export report settings:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Select the HTML reports that you want to download.

To narrow the list by report name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. HTML report settings are downloaded to a workbook titled HTML_Workbook.xlsx. Save the file to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import report settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reports that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'HTML_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing reports in the spreadsheet, and adds any new reports with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

HTML Report Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings and filters for each report in the order listed below. For a description of each report setting, see the Creating HTML Reports topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- HTML Report

The HTML Report worksheet contains the settings for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
HTML Report System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a report exists, its settings are changed with the values in the uploaded file. If it is new, a unique system name exists in the file when uploaded, a new report is created.
HTML Report Display Name	Any	If blank, the report does not upload.
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the report is placed in the Default category.
Query	Valid query system name	If blank, the report does not upload.
Transpose	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Active in Charts &	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Reports		
Active in Projects	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Required Notifications

The Required Notifications worksheet includes the notification settings of the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
HTML Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
Notification	Show Hide Required	If blank, report does not upload.
Notification Day	Monday Tuesday Wednesday Thursday Friday Saturday Sunday	If Notification is set to Required , at least one valid day of the week must be entered. Include a separate row for each day. Otherwise, leave blank.

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- Roles

The Roles worksheet includes the roles restriction settings of the report being uploaded or downloaded. The values can be blank, resulting in a report uploaded that does not contain role restrictions.

Column Name	Accepted Values on Upload	Additional Notes
HTML Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
Roles	Valid Accolade user role	Include a separate row for each role. Can be blank.

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- Access Groups

The Access Groups worksheet includes the access groups for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
HTML Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
Access Group	Valid access group system name	Include a separate row for each access group.

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Importing and Exporting MS Excel Reports

Accolade provides Administrators and Process Designers the ability to export MS Excel reports settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate MS Excel reports in each environment, download the information and import into a different environment.

The download exports the MS Excel reports configuration information into a spreadsheet file with the parts of the reports grouped into tabs.

To export report settings:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Select the MS Excel reports that you want to download.

To narrow the list by report name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. MS Excel report settings are downloaded to a workbook titled EXCEL_Workbook.xlsx. Save the file to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import report settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reports that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'EXCEL_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing reports in the spreadsheet, and adds any new reports with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

MS Excel Report Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings and filters for each report in the order listed below. For a description of each report setting, see the Adding MS Excel Reports to Accolade topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Excel Report

The Excel Report worksheet contains the settings for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
MS Excel Report System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a report exists, its settings are changed with the values in the uploaded file. If it is new, a unique system name exists in the file when uploaded, a new report is created.
MS Excel Report Display Name	Any	If blank, the report does not upload.
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the report is placed in the Default category.
Query Worksheet 1-5	Valid query system name	Can be blank.
Active Charts & Reports	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Active Projects	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Template	Valid template system name of a template available in the Template Library	Template must be uploaded prior to being added to the report. If blank, the report does not upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

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- Roles

The Roles worksheet includes the roles restriction settings of the reports being uploaded or downloaded. The values can be blank, resulting in a report uploaded that does not contain role restrictions.

Column Name	Accepted Values on Upload	Additional Notes
MS Excel Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
Roles	Valid Accolade user role	Include a separate row for each role. Can be blank.

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- Access Groups

The Access Groups worksheet includes the access groups for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
MS Excel Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
Access Group	Valid access group system name	Include a separate row for each access group.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Accolade Online Reports

Accolade provides Administrators and Process Designers the ability to export Accolade online reports settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate online reports in each environment, download the information and import into a different environment.

The download exports the online reports configuration information into a spreadsheet file with the parts of the reports grouped into tabs.

To export report settings:

1. From the **Workspace** menu, select **My Workspace > Charts & Reports**.
2. Select the reports that you want to download.

To narrow the list by report name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. Online report settings are downloaded to a workbook titled RPT_Workbook.xlsx. Save the file to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import report settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reports that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **Workspace** menu, select **My Workspace > Charts & Reports**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'RPT_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing reports in the spreadsheet, and adds any new reports with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Online Report Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings and filters for each report in the order listed below. For a description of each report setting, see the Creating Online Reports within Accolade topic in the online Help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Report Settings

The Report Settings worksheet contains the settings for the reports being imported.

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a report exists, its settings are changed with the values in the uploaded file. If it is new, a unique system name exists in the file when uploaded, a new report is created.
Display Name	Any	If blank, the report does not upload.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the report is placed in the Default category.
Subject System Name	Valid report subject system name	Used for matching for upload. If the Subject System Name specifies Project Snapshot History , a value must be entered in the Is Snapshot field on the Columns and Filters worksheet. If blank, the report does not upload.
Owner	Valid user system ID	Use the format <i>(domain)\(user name)</i> without the parentheses.

Column Name	Accepted Values on Upload*	Additional Notes
		<p>If you are uploading a new report, the downloaded file can be changed to a new owner in order to transfer initial ownership when loading the file. If this field is left blank or has an invalid user ID entered, the system will assign the user completing the upload as the owner of the report.</p> <p>If you are making changes to an existing report via upload, the Owner column is ignored and will not update.</p> <p>💡 If a downloaded report was created by a user that has been deleted, this file will reflect [None] as the report owner.</p>
Additional Owners	Valid user system ID	<p>Use the format <i>(domain)\(user name)</i> without the parentheses. Separate each additional owner by a pipe () character.</p> <p>Can be blank.</p>
Roles	Valid Accolade user role	<p>Separate each role by a pipe () character.</p> <p>Can be blank.</p>
Description	Any	Can be blank.
Override Project Filtering	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Export Days	Integers	Can be blank.
Export Time	Time value in	Can be blank.
Export File Path	Valid file path for the export to	Can be blank.
Export File Name	Alphanumeric characters, underscore**	Can be blank.
Export Include Timestamp	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Export File Type	Excel CSV	If blank, the setting defaults to Excel .
Available to Charts & Reports	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Configuration	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Transpose	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Columns and Filters

The Columns and Filters worksheet includes the report column settings of the reports being imported.

Column Name	Accepted Values on Upload*	Additional Notes
Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
Unique Group System Name	Valid reference table system name Valid matrix system name	Can be blank if Reporting Column Type is defined as Standard or Metric .
Reporting Column Type	Standard Reference Table Metric Matrix Calculated	The value is related to the Reporting Data Type value, and must match in terms of appropriate data types. If blank, the report does not upload.
Reporting Data Type	String Image List Number Date Boolean ID Multilist	The value is related to the Reporting Column Type value, and must match the column type. If blank, the report does not upload.
Column System Name	Valid report column-specific system name**	Used for matching for upload. If a report column exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new column is created.
Display Name	Any	Can be blank.
Sort Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Sort Ascending	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Property	Aggregation Method None Avg Min Max StDev Sum Date Mask Excel Dates Days Months Quarters Years Link	Link is only available for the Project Name report column. Can be blank.
Column Order	Any number	Must be a unique value for each column included in a report.
Display Column On Report	Yes, Y, True, 1, X*	Set the value to No, N, False, 0 if the column is only used as a filter and not a report column. Otherwise, set the value to Yes, Y, True, 1, X and specify the Filter ID if applicable. All other values are treated as No on upload.
Filter ID	Any number	Must be a unique value for each filter included in a report. Can be blank if the report does not include filters and the Display Column On Report is set to Yes .

Column Name	Accepted Values on Upload*	Additional Notes
Filter Type	equal not equal greater than less than greater than or equal to less than or equal to is empty is not empty between contains does not contain is one of between days between dates days before days after	If a Filter ID is specified, the Filter Type must be defined. and values must be entered on the Filter Values worksheet. Can be blank if the report does not include filters and the Display Column On Report is set to Yes .
Is Snapshot	Yes, Y, True, 1, X*	If the Subject System Name on the Report Settings worksheet is set to Project Snapshot History , this field determines if the metric or matrix is part of the snapshot, and must have a value entered. Otherwise, can be blank. All other values are treated as No on upload.
Is Link	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Formula	A valid expression	If Reporting Column Type is defined as Calculated , the Formula must be defined for the calculated column. Otherwise, can be blank.
Data Format	<i>For columns containing dates:</i> Days Months Quarters Years Excel Dates Timestamp <i>For columns containing numbers:</i> #;(##)	Data Format only applies for columns that contain date or number values and specifies how the data displays when the report is run. <ul style="list-style-type: none"> • Date columns - If blank, the value defaults to Excel Dates on upload. • Number columns - If blank, the value defaults to #;(##) on upload.

Column Name	Accepted Values on Upload*	Additional Notes
	#,###,(#,###) \$#,###;(\$#,###)	
Show	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Filter Values

The Filters Values worksheet includes the values of the filters defined on the reports being imported. This worksheet can be blank if the reports do not include filters.

Column Name	Accepted Values on Upload	Additional Notes
Filter ID	Any number	Used for matching for upload. If a filter exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new filter is created. Can be blank if the report does not include filters.
Filter Value Rank	Any number	Can be blank if only one filter is included in the report.
Filter Value Type	Text Field code Metadata Metric Current User	If the report includes filters and this field is blank, the filter does not upload.
Filter Value	Valid metric system name or field code	If the Filter Type on the Columns and Filters worksheet is defined as is one of , separate the metric or field code system name values with a pipe () character. If the Filter Type on the Columns and Filters worksheet is defined as between , the worksheet includes additional rows for each filter value. Additionally, concatenate an integer to the field code system name to further specify the field code. For example, a gate date field code would include an integer to specify if it is referencing gate date 1, 2, 3, etc. Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
Filter Runtime Filter	Yes, Y, True, 1, X*	All other values are treated as No on upload.

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- Access Groups

The Access Groups worksheet includes the access groups for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

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- Matrix Join Definitions

The Matrix Join Definitions worksheet includes the join definitions for reports being uploaded or downloaded that include multiple matrices. This worksheet can be blank if the reports do not include multiple matrices.

Column Name	Accepted Values on Upload	Additional Notes
Report System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
Source Matrix System Name	Valid matrix system name	Used for matching for upload. Cannot be the same matrix referenced in the Target Matrix System Name field. If the report contains matrices and this field is blank or invalid, the definition does not upload.
Source Matrix Metric System Name	Valid matrix metric system name	Must be a metric that is included in the matrix defined in the Source Matrix System Name field. If this field is blank or invalid, the definition does not upload.

Column Name	Accepted Values on Upload	Additional Notes
Target Matrix System Name	Valid matrix system name	Used for matching for upload. Cannot be the same matrix referenced in the Source Matrix System Name field. If the report contains matrices and this field is blank or invalid, the definition does not upload.
Target Matrix Metric System Name	Valid matrix metric system name	Must be a metric that is included in the matrix defined in the Target Matrix System Name field. If this field is blank or invalid, the definition does not upload.

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Importing and Exporting Queries

Accolade provides Administrators and Process Designers the ability to export queries from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate queries in each environment, download the information and import it into the new environment.

The download exports the query configuration information into a spreadsheet file with the parts of the query grouped into tabs.

To export queries:

1. From the **System** menu, select **Content Sources > Queries**.
2. Select the queries that you want to download.

To narrow the list by query name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all queries, select **All**.

3. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import queries into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any queries that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Queries**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the queries in the spreadsheet, and adds any new queries with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Queries Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each query in the order listed below. For a description of each query setting, see the Adding Database Queries topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Queries

Column Name	Accepted Values on Upload	Additional Notes
Query System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a query exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new query is created.
Query Name	Any	If blank, the query does not upload.
Description	Any	Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If blank, the query is placed in the Default category.
SQL	Valid query	Enter the query code.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
Query System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a query exists, its settings are changed with the values in the uploaded file.
Access Groups	Valid access group system name	Include a separate row for each access group.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Metrics

Accolade provides Administrators and Process Designers the ability to export metrics from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate metrics in each environment, download the information and import it into the new environment.

The download exports the metrics configuration information into a spreadsheet file with the parts grouped into tabs.

To export metric settings:

1. From the **System** menu, select **Content Sources > Metrics**.
2. Select the metrics that you want to download.

Use the **Metric ID** search field to find the metrics you wish to download. A partial search entry pulls up a list of all matching metric IDs containing those numeric characters.

You can also enter a category, name, and/ or system name when searching by metric ID to find the metrics that match all criteria entered. These filters are case insensitive.

To narrow the list by metric name or system name, add the criteria to filter by in the appropriate filter text box.

To narrow the list by category, select a category to display in the **Category** list. To download all metrics, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the metrics to a spreadsheet file and saves it to a temporary internet files directory. Save the file to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import metric settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any metrics that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Metrics**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.

Accolade uploads the changes to the metrics in the spreadsheet, and adds any new metrics with unique system names.

6. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.


Metric Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each metric in the order listed below. For a description of each metric setting, see the Creating Metrics topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Metrics

If you want to import metric settings without associating the metric to a process model, complete this section of the spreadsheet only. You will need to include the [Additional Model Settings](#) columns listed below, but they can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a metric exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new metric is created.
Display Name	Any	If blank, the metric does not upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Metric ID	<i>(Read Only)</i> The metric ID is included in the download file, but is not editable on upload.	
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the metric is placed in the Default category.
Data Type	String Number Date List Long String Multi-Select List	Can only upload changes for rows that create new metrics. Existing metrics must match their Data Type along with System Name and Display Name .  If the Data Type selected is List or Multi-Select List and the list is manually defined within the metric, enter the list values on the List Values spreadsheet tab.
Decimal Places	Any number	Applies only to Number type metrics. Is set to 0 on upload if no value is entered or the value is not a number.
Is Filter	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Is Matrix	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Reporting	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Portfolio	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Optimizer		
Available to Planning	Yes, Y, True, 1, X*	This setting is only changeable on upload if the setting on download is No . All other values are treated as No on upload.
Milestone Shape	Arrow Bar Checkmark InvertedTriangle Marker Pin Rocket Starburst Target	Applies only to Date type metrics that have Available to Planning selected as Yes . If blank, defaults to InvertedTriangle .
Available to Resource Editor	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Is Inherited	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Is Calculated	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Calculated Expression	A valid expression	Applies only to metrics with Is Calculated set to Yes . The row does not upload if the expression is invalid.
Calculated Event Triggers	AssociatedChange ProjectCreate ProjectMigrate ProjectClose ProjectReOpen	Applies only to metrics with Is Calculated set to Yes . To apply more than one trigger, separate events using a pipe () character. If the metric value is invalid, the trigger will not be assigned.
Calculated Timed Triggers	Daily Weekly Monthly EndOfMonth Quarterly Yearly	Applies only to metrics with Is Calculated set to Yes . Use the format <type>;<yyyy/MM/dd> <hh:mm:ss> For example, Daily;2018/06/18 10:00:00. Only one interval of the same type may be assigned. If more than one interval is uploaded the first displayed will be set. For example, two-day events cannot be assigned, but day and month can be assigned.

Column Name	Accepted Values on Upload*	Additional Notes
		<p>To apply more than one trigger, separate timed events using a pipe () character.</p> <p>Timed event accepted values use international dates, and 24 hour times.</p> <p>EndOfMonth dynamically changes based on the date each month falls on.</p> <p>If the metric value is invalid, the trigger will not be assigned.</p>
Initialized From	Valid metric system name	The row does not upload if the indicated system name is not a valid system name for an existing metric.
Metric Query	Valid SQL query expression	<p>Applies only to List and Multi-Select List metrics that use a query to determine the list values.</p> <p>The row does not upload if the expression is invalid.</p>
Office Format	#, 0	Applies only to Number type metrics in Microsoft Word or PowerPoint.
Track History	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Reference Table	Valid reference table system name	Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.
Reference Table Column	Valid column system name within the table	Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.
Reference Table Constraints	Valid reference table column value or valid query code	<p>Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.</p> <p>Separate list items using a pipe () character.</p>
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Milestone Shape Color Metric System Name	Valid metric system name	<p>Applies only to Date type metrics that have Available to Planning selected as Yes.</p> <p>The row does not upload if the indicated system name is not a valid system name for an existing metric.</p> <p>If blank, defaults to [None].</p>
Restrict to These Roles	Valid Accolade user role	Separate roles using a pipe () character.
Allow Updates	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
from My Work page		
Available to Workflow Lineup	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Configuration Access Groups	Valid access group display name	Separate access groups using a pipe () character.
Available to BI	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Available to Search	Yes, Y, True, 1, X*	Applies only to String, Long String, and Multi-Select List metrics. All other values are treated as No on upload.
Rich Text	Yes, Y, True, 1, X*	Applies only to Long String metrics. All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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In addition, the Metrics spreadsheet includes the association setting for each process models (active and inactive) to which each metric is associated. Each process model to which the metric is associated contains the following set of columns, and each set of columns is identified by the process model name.

- Additional Model Settings

For a description of each metric association setting, see the Associating Metrics to Models topic in the online Help.

Note: The columns in this portion of the spreadsheet are used for associating a metric with a model, and do not create new process models in Accolade.

Column Name	Accepted Values on Upload	Additional Notes
Associated	Yes, Y, True, 1, X*	This column defaults to Yes if any of the related model columns are defined. All other values are treated as No on upload.
Project Creation	Edit Show	Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
Project Metrics	Edit Show	Can be blank.
Status Report	Edit Show	Can be blank.
Portfolio	Edit Show	Can be blank.
Planning Favorite	Yes, Y, True, 1, X*	The Available to Planning column for the metric must be set to Yes, Y, True, 1, X* if this column is set to Yes, Y, True, 1, X* . All other values are treated as No on upload.
Milestone	Yes, Y, True, 1, X*	Applies only to Date type metrics. The Available to Planning column on the metric must be set to Yes, Y, True, 1, X* if this column is set to Yes, Y, True, 1, X* . All other values are treated as No on upload.
Required	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

- List Values

If the **Data Type** selected is **List** or **Multi-Select List** and the list is manually defined within the metric, the list values should be entered on this tab. For a description of each list value setting, see the Creating Single and Multi-Select List Metrics topic in the online help.

This worksheet must be included in the spreadsheet file, but can be left blank if the metrics do not include defined lists.

Column Name	Accepted Values on Upload	Additional Notes
Metric System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a metric exists, its settings are changed with the values in the uploaded file.
List Value Name	Any	If blank, the list value does not upload.
List Value System Name	Alphanumeric characters, underscore**	Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Color	Valid hex color code	Can be blank.

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Importing and Exporting Matrices

Accolade provides Administrators and Process Designers the ability to export matrices from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate matrices in each environment, download the information and import it into the new environment.

The download exports the matrices configuration information into a spreadsheet file with the parts grouped into tabs.

To export matrices:

1. From the **System** menu, select **Content Sources > Matrices**.
2. Select the matrices that you want to download.

To narrow the list by matrix name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all matrices, select **All**.

3. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

Note: Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

To import matrices into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any matrices that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Matrices**.

4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the matrices in the spreadsheet, and adds any new matrices with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

Note: Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

Matrix Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each matrix in the order listed below. For a description of each matrix setting, see the Creating Matrices topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Details

Column Name	Accepted Values on Upload*	Additional Notes
Matrix System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new matrix is created.
Matrix Name	Any	If blank, the matrix does not upload.
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the matrix is placed in the Default category.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.

Column Name	Accepted Values on Upload*	Additional Notes
Available to Reporting	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Portfolio Optimizer	Not Available Reporting Only Edit	If blank, the matrix does not upload.
Available to BI	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload. The workflow cannot be deleted if in use.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Metrics

Column Name	Accepted Values on Upload	Additional Notes
Matrix System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
Metric System Name	Valid metric system name	If blank, the metric does not upload.
Category	The metric's category	If blank, the metric does not upload.
Data Type	The metric's datatype	If blank, the metric does not upload.
Unique	Yes, Y, True, 1, X*	All other values are treated as No on upload. Multi-select lists and calculated metrics within the matrix cannot be set as unique.
Portfolio Header Columns	Any number	Can be blank.
Filterable	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Portfolio Optimizer Filter Values	Valid list value for the metric	Separate each filter value with a pipe () character.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

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- Models

Column Name	Accepted Values on Upload*	Additional Notes
Matrix System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
Model	Valid process model system name	If blank, matrix does not upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
Matrix System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

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Importing and Exporting Extended Fields

Accolade provides Administrators and Process Designers the ability to export custom details, called extended fields, from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate extended fields in each environment, download the information and import it into the new environment.

The download exports the extended fields configuration information into a spreadsheet file with the parts grouped into tabs.

To export extended fields:

1. From the **System** menu, select **Configuration > Extended Fields**.
2. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

To import extended fields into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any extended fields that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Configuration > Extended Fields**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the extended fields in the spreadsheet.

7. *(Optional)* Click **Print** to print the import results for your records.

Extended Fields Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each extended field in the order listed below. For a description of each extended field setting, see the Adding Custom Details Throughout Accolade topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Extended Fields

Column Name	Accepted Values on Upload*	Additional Notes
Extended Field System Name	Valid extended field system name	Used for matching for upload. If an extended field exists, its settings are changed with the values in the uploaded file. If invalid, the extended field does not upload.
Extended Field Name	Any	If blank, the extended field does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
Extended Field ID	Valid system field ID	If blank, the extended field does not upload.
Datatype	Date Fields List Fields Long String Fields Multi-Select List Fields Number Fields String Fields	If blank, the extended field does not upload.
Query	Valid query in Accolade	Either Query or Defined List must be entered if the Data Type is a List Field or Multi-List Field . If not a list field, leave blank.
Defined List	Any	Separate list items using the pipe () character. Either Query or Defined List must be entered if the Data Type is a List Field or Multi-List Field . If not a list field, leave blank.
Activities	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Deliverables	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Pools	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Timesheets	Yes, Y, True, 1, X*	All other values are treated as No on upload.
User Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
User Required	Yes, Y, True, 1, X*	All other values are treated as No on upload.
User Searchable	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False, or 0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

Importing and Exporting Project Link Types

Accolade provides Administrators and Process Designers the ability to export link types from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate link types in each environment, download the information and import it into the new environment.

The download exports the link types configuration information into a spreadsheet file with the parts grouped into tabs.

To export project link types:

1. From the **System** menu, select **Process > Link Types**.
2. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

To import project link types into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any link types that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Link Types**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the link types in the spreadsheet, and adds any new link types with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

Project Link Types Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each link type in the order listed below. For a description of each link type setting, see the Creating Project Link Types topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Link Types

Column Name	Accepted Values on Upload*	Additional Notes
Link Type System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new link type is created.
Link Type Display Name	Any	If blank, the link type does not upload.
Link From Name	Any	If blank, the link type does not upload.
Link To Name	Any	If blank, the link type does not upload.
Description	Any	Can be blank.
Line Color	Any color.	If blank, defaults to Black .
Arrow Direction	Neither Direction To --> From From --> To Both Directions <-->	If blank, defaults to Neither Direction .
Dependency Type	Start - Start Finish - Finish Finish - Start Date - Date None	If blank, defaults to None . If Date - Date is selected, Source Default Date and Target Default Date need to be defined.
Source Default Date	Project Start Date Project End Date Gate 1...20 any available project date metric	Leave blank unless Dependency Type is defined as Date - Date .
Target Default Date	Project Start Date Project End Date Gate 1...20 any available project date metric	Leave blank unless Dependency Type is defined as Date - Date .
Manage Links	To --> From From --> To Both Directions <-->	If blank, defaults to Both Directions <--> .
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Active	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Roles

Column Name	Accepted Values on Upload	Additional Notes
Link Type System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file.
Restrict to These Roles	Valid Accolade role	Separate roles using the pipe () character.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Mappings

Column Name	Accepted Values on Upload*	Additional Notes
Link Type System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file.
From Process Model	Valid process model system name	If blank, the link type does not upload.
To Process Model	Valid process model system name	If blank, the link type does not upload.
Max Project Links	Any number	Can be blank.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1**, or **X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1**, or **X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Global Links

Accolade provides Administrators and Process Designers the ability to export custom menu item configuration (global links) from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a

separate environment. Instead of having to recreate global links in each environment, download the information and import it into the new environment.

The download exports the global links configuration information into a spreadsheet file with the parts of the links grouped into tabs.

Note: The **Disable Link to File** and **Disable Link to Website** parameter settings determine if you can link to web site or file.

To export global links:

1. From the **System** menu, select **Process > Global Links**.
2. Click **Download** in the top right corner of the page.

By default, the file exports automatically to a temporary internet files directory. Save it to a more accessible location.

To import global links into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any global links that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Global Links**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the global links in the spreadsheet, and adds any new global links with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

Global Links Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each global link in the order listed below. For a description of each global link setting, see the Adding Menu Items for Multiple Users (Global Links) topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Global Links

Column Name	Accepted Values on Upload*	Additional Notes
Global Link System Name	Alphanumeric characters, underscore**	Used for matching for upload. If a global link exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new global link is created.
Global Link Name	Any	If blank, the global link does not upload.
Link Prefix	Valid link prefix	Enter the prefix for the global link being created. Accolade supports the following link types: <ul style="list-style-type: none"> • http - A URL to a Web page. • https - A URL to a secure Web page. • ftp - A link to an FTP download site. • file - A link to a file or executable on your company's intranet. • qvp - A link to a Dashboards for Accolade chart if using the Dashboards viewer. • mailto - Opens the user's email application and displays a blank email addressed to this email address. • calto - Opens your selected chat and collaboration tool, which invites the person at the address you define to a chat. <p>💡 Based on your server setup, http, https, and file global link types are available to add as the content of a pod within a page layout.</p>
Link	Valid link address	Enter the address for the global link being created. For example, www.google.com. If blank, the global link does not upload.
Menu	Alphanumeric characters	Used for matching for upload. If a display menu exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new display menu is created. To create a global link that is only available to add to a pod within a layout, leave this option blank.

Column Name	Accepted Values on Upload*	Additional Notes
Embed	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Landing Page	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Default Home Page	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Order	Any number	The field is set to 0 on upload if no value is entered or the value is not a number.
Display in menu	Yes, Y, True, 1, X*	All other values are treated as No on upload.
Category	Alphanumeric characters	Used for matching for upload. If a display category exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new display category is created. To create a global link that is only available to add to a pod within a layout, leave this option blank. Category is required on the global link to Display in menu.
Delete	Yes, Y, True, 1, X*	All other values are treated as No on upload.

* For any column that accepts **Yes, Y, True, 1, or X**, you can also enter **No, N, False**, or **0** if it helps you when entering data in the spreadsheet. All values other than **Yes, Y, True, 1, or X** are treated as **No** when you upload the spreadsheet.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

- Roles

Column Name	Accepted Values on Upload	Additional Notes
Global Link System Name	Alphanumeric characters, underscore**.	Used for matching for upload. If a global link exists, its settings are changed with the values in the uploaded file.
Roles	Valid Accolade user role	Include a separate row for each role.

** Limited to characters between a - z, A - Z, and 0 - 9, and the underscore (_).

Importing and Exporting Parameters

Accolade provides Administrators and Process Designers the ability to export parameter settings from one Accolade environment and import it into another Accolade environment. For example, your

company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to reconfigure parameters in each environment, download the information and import it into the new environment.

To export parameters settings:

1. From the **System** menu, select **System > Settings**, then select the **Parameters** tab.
2. Click **Download** in the top right corner of the page.
3. In the Download dialog box, select the parameter settings that you want to download.



The dialog box automatically includes all parameters that can be set on this page, and additional selections can be added or removed as necessary.

To narrow the list by parameter name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list.

Accolade downloads all selected parameters settings in alphabetical order in a spreadsheet file, and saves it to a temporary internet files directory. Save the file to a more accessible location.

To import parameters settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any parameter settings that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **System > Settings**, then select the **Parameters** tab.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the parameters in the spreadsheet, and adds any new parameters settings.

7. *(Optional)* Click **Print** to print the import results for your records.

Parameter Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the parameter display name and the value from the system. For a description of each parameter, see the Accolade Parameters topic in the online help.

Important! Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

- Parameters

Column Name	Accepted Values on Upload	Additional Notes
Parameter System Name	Valid parameter system name	Used for matching for upload. If a parameter exists, its settings are changed with the values in the uploaded file.
Display Name	Parameter display name	This is included for identification purposes only and is treated as read-only on upload.
Value	Dependent on parameter being uploaded	If invalid, the parameter does not upload.
Description	Description of parameter	This is included for identification purposes only and is treated as read-only on upload.

Sopheon Corporation

6870 West 52nd Avenue, Suite 215

Arvada, CO 80002