

Accolade Administrator Quick Reference

Navigating Accolade as an Administrator

ACCOLADE

WorkspaceSystemResourceIdeaPlanningDashboardsVOL Global Links

New Project

?

Search...

Using Navigational Components

- Recent Items** - Display recently accessed items
- Menu** - Access main level pages
- Help** - Access help pages
- Search** - Enter text to search for projects and files
- Notifications** - Access main level pages
- User Settings** - Access the following:
- **My Profile** - Access and make changes to your profile
 - **Set as Home** - Make the current page your home page
 - **About** - Display the current version of Accolade
 - **Environment** - Show detailed information about Accolade
 - **Logout** - Exit Accolade

Accessing Administrative Actions

Menu > System > Collaboration & Groups

- Access Groups** – Create and maintain access groups, security lists, and security profiles
- Functions** – Labels to identify users who should own project components, including deliverables, workflow actions, and gatekeepers
- User Admin** – Create, define, add, and import user accounts, and assign user attributes
- Workflows** – Define the sequence of steps to create a deliverable or activity

Defining Access and Setting Up Users

Menu > System > Collaboration & Groups > User Admin

From the **User Admin** menu, you can access and edit user accounts and details, and search for users using various details including functions, email, and roles from the left panel.

User Search (2)

Functions

Select Options

User Name Contains

jane

Group By:

More options

Search

Jane Automation

Jane Customer

- Edit** attributes of users
(To make the same changes to multiple user at once, select more than one user from the available list)
- Add** a new Accolade user to the database
- Download** and **upload**
(Add new user accounts or make changes to existing user accounts)

Assigning User Attributes

After creating a user account, assign user attributes in the following areas:

- General Details
- Roles and Rights
- Access Groups
- Extended Fields
- Security Lists
- Security Profiles
- Functions
- User Links
- Email Notifications
- HTML Report Notifications

Adding Individual Users

1. Click **+** to display the **Add New User** dialog.
2. Add user information individually or choose **Copy From** to duplicate a user's configuration details.
3. Click **Create**. The new user displays in the center panel. Add details or edit as needed.

Importing Multiple Users

1. Create the spreadsheet file according to the specifications outlined in the Accolade online Help topic.
2. Click **Load File** and select the spreadsheet file to import.
3. Click **Upload File** to run the import.

Setting User Email Notifications

1. In the users list, select one or more users to modify.
2. Click the **Email Notifications** tab.
3. Select when to send emails to users and on what events.
4. Click **Save** to save your changes.

Deactivating Users

(Removes user access but saves the account)

1. In the users list, select one or more users to deactivate.
2. In the **General Details** tab, clear the **Active** check box.
3. Click **Save** to save your changes.

Removing User Accounts

(Removes user from default assignments, project teams, and deletes the account)

1. In the users list, select one or more users to remove.
2. Click **Delete User(s)**.

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Securing Information

Access Groups - Containers that determine user access to project components, reference tables, and planning elements in Accolade Innovation Planner

Security Lists - Hierarchical lists that control projects and unowned resource pools access

Security Profiles - Define project access based on classes and metrics associated with a project and user

Creating Access Groups

1. From the **System** menu, select **Collaboration & Groups > Access Groups**.
2. In the **Access Group** list, select the group and the level to which you want to add a child group and click **+**. To create the first group in a new hierarchy, select the top-most group.
3. Enter a unique name and system name and click **Create**.

Creating Functions & Functional Areas

1. From the **Systems** menu, select **Collaboration & Groups > Functions**.
2. Click **Add Functional Area** to create a group that contains functions or select a functional area and click **+** to add a function within the area.
3. Enter the required information. Click **Apply**.

Granting Security Permissions

1. From the **User Admin** page, select the user(s) to modify.
2. Select the security setting to update: **Access Groups**, **Security Lists**, or **Security Profiles**.
3. Select the appropriate check boxes to assign to users and click **Save**.

Other Ways to Configure Your Site

(Search Help for more information on these topics)

- **Custom pages** using page layouts
- Links to other sites and directories using **Global Links**
- **Deliverable and activity display** options
- **Events for MS Office** documents

Building Security Lists Using Reference Tables

1. Create a spreadsheet titled **SGM_SecurityList_<number>** that includes a worksheet named **SGM_RefTableSheet**.
2. Add the following columns in order: **ID**, **ParentID**, **Name**, **Level**, **LevelName**, and enter list values.

ID	ParentID	Name	Level	LevelName
2	Geography	Geography	1	Geographical Location
3	Asia	Asia	2	Continent Name
4	Europe	Europe	2	Continent Name
5	France	France	3	Country Name
6	Dijon	Dijon	4	City Name
7	Paris	Paris	4	City Name
8				



3. Add the file as a reference table with a system name **SGM_SecurityList_<number>** where **<number>** is 1 to 5.

Configuring Accolade

Importing and Exporting Configuration Components

Administrators can transport configuration components between environments by exporting and importing via spreadsheets. Components that can be moved include:

- **Process Models** - System > Process > All Models
- **Access Groups** - System > Collaboration & Groups > Access Groups
- **Functions** - System > Collaboration & Groups > Functions
- **Charts & Reports** - System > Content Source > Charts & Reports Manager
- **All System Configuration Components**

To export settings, select desired component and click **Download**

To import settings, ensure data meets requirements for a successful import, update the downloaded files to add or remove the changes, select the file, and click **Upload**

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



Replacing Logos

1. Create or locate the company logo to use and save it in an accessible location, ensuring that the file name is **logo.png** and the size is **107 x 18 pixels**.
2. Copy and paste the new file over the existing graphics files in the following default installation path on the application server:

C:\Program Files\Sopheon\Accolade\Website\Content\Themes\Accolade\Images

Add Header or Footer Text

In the Accolade Administration Console, update the **Accolade Page Header Text** or **Accolade Page Footer Text** system parameter to have required text display for all users.