



Sopheon Accolade[®]

User Administrator Plugin Installation Guide

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About Sopheon Accolade®

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About this Guide

Welcome to the *Sopheon User Administration Plugin Installation Guide*. This plugin serves as a solution to manage Accolade users with API and sync user information with an external identity management system. This plugin uses APIs that are compliant with System for Cross-Domain Identity Management (SCIM) and easily integrates with Accolade.

This guide describes how to install and configure the User Administration Plugin and is divided into the following sections:

- **User Administration Plugin at a Glance** - Describes the prerequisites, value, and basic functionality of the plugin.
- **Installing and Upgrading the User Administration Plugin** - Describes the steps to install and upgrade the User Administration Plugin.
- **Installing and Upgrading the User Administration Plugin in a Load-Balanced Environment** - Describes the steps to install and upgrade the User Administration Plugin if your company configuration includes use of an Accolade Server Farm.
- **Configuring an External Identity Management System** - Provides general guidance on connecting the User Administration Plugin with an external identity management system. The exact setup varies depending on the identity management system and your configuration.
- **Sopheon User Extension** - Describes the Sopheon User Extension that provides Accolade specific properties for your SCIM mapping.

This version of the User Administration Plugin is intended for integration with Sopheon Accolade v.16.1.

Assumptions

This guide assumes you are familiar with Accolade and managing user information and system access, including the following:

- Basic knowledge of Application Programming Interface (API).
- Familiarity with the System for Cross-domain Identity Management specification (SCIM).

Font Conventions

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

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

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

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

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

Process Document - Smart Excel <version>.xlt

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

Icon Conventions



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



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

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

Related Documentation and Resources

- *Sopheon Accolade v16.1 Installation Guide*
- Navigate to `https://your-server-name/help/apihelp` for additional information on Accolade APIs. When the plugin is successfully installed, the SCIM APIs will display here.

User Administration Plugin at a Glance

The User Administration Plugin provides a solution for administrators to manage Accolade users using API. This plugin is designed to tie customized identity management systems to standardized endpoints in Accolade using SCIM protocol.

The User Administration Plugin is available for download as a plugin and is intended to be used by administrators to manage Accolade users using an identity management system.

Prerequisites

The User Administration Plugin has the following prerequisites:

- Sopheon Accolade v.16.1.
- An Accolade user account set up with admin access to the Root Access Group.
- An identity management system that supports System for Cross-domain Identity Management specification (SCIM). Some identity management systems may require a certification for integration.

Important! The User Administration Plugin cannot be used in tandem with Active Directory Sync (AD Sync). AD Sync must be disabled before the User Administration Plugin can be enabled.

Installing and Upgrading the User Administration Plugin

The User Administration Plugin is installed as a plugin for the main Accolade web application.

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

To install or upgrade the User Administration Plugin:

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

5. On the application server, open the **ScimApiPlugin** directory, navigate to the **Server Installation (Application)** folder, and run the **Setup.exe** file.
6. Restart any previously stopped services.

The User Administration Plugin is now installed and a log file was added to the following location: **Website > Bin > Plugins**.

To verify that the plugin was successfully enabled, go to `https://your-server-name/help/apihelp`. The plugin was successfully enabled if the information for Scim Service Provider Configuration, Users, Resource Types, and Schemas are displayed.



This information can be used when mapping Accolade data to your identity management system.

8. Log in to your external identity management system to complete the configuration required to connect with the User Administration Plugin.

Installing and Upgrading the User Administration Plugin in a Load-Balanced Environment

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

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

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

1. Complete the steps in "[Installing and Upgrading the User Administration Plugin](#)" on [page 6](#) for the installation on the "Main" Accolade Task server.
2. Copy the entire **Server Installation (Application)** folder from the "Main" Task Server to all remaining Accolade Server Farm servers.
3. For each server, run the **Setup.exe** file located in the **Server Installation (Application)** folder.
4. Restart all Accolade services on the Accolade server.

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

Configuring an Identity Management System

The User Administration Plugin requires configuration to your external identity management system in order to connect with Accolade. Note that some identity management systems may require a certification for the integration.

The plugin must first be installed per "[Installing and Upgrading the User Administration Plugin](#)" on page 6. Once it's installed, please refer to your identity management system provider for specific setup information.



A list of SCIM endpoints is available at `https://your-server-name/help/apihelp` once the User Administration Plugin is installed. The Sopheon User Extension is described below.

Sopheon User Extension

The Sopheon User Extension provides Accolade specific properties for your SCIM mapping. This is used with the SCIM user endpoints described at <https://your-server-name/help/apihelp>.



For more information on this and other schemas that apply to users, call the schema endpoint located at <https://your-server-name/Help/ApiHelp/Api?apiId=GET-api-scim-v2-schemas>.

Name	Description	Type	Additional Information
accessGroups	Array of accessgroups for the user.	Collection of V2.AccessGroup	None.
allowMyProjectPageUpdates	Enables or disables updates from the My Projects page.	boolean	None.
allowScenarioUpdates	Enables or disables updates to scenarios.	boolean	None.
customLink1	First user defined custom link.	V2.CustomLink	None.
customLink2	Second user defined custom link.	V2.CustomLink	None.
customLink3	Third user defined custom link.	V2.CustomLink	None.
customLink4	First user defined custom link.	V2.CustomLink	None.
customLink5	First user defined custom link.	V2.CustomLink	None.
dateFormat	The user's date format. Valid values are 'M/d/yyyy', 'MMM dd, yyyy', 'd/M/yyyy', 'dd/MM/yyyy', 'd.M.yyyy', 'd-M-yyyy', 'yyyy-MM-dd', 'yyyy/M/d', or 'yyyy.M.d.'"	string	None.
emailNotifications	Identifies which events generate and send an automated email notification to the user.	V2.EmailNotification	None.
enableAutoSearchOnProjectCreation	Enables or disables an automatic search for projects with the same or similar names or descriptions when creating new projects.	boolean	None.

Name	Description	Type	Additional Information
expirationDate	The last date on which the user's account is active.	date	None.
extendedFields	Set user values for extended fields.	Collection of V2.ExtendedField	None.
functions	List of functions a user has by System Name.	Collection of string	None.
portfolioOptimizerAdditionalPoolRights	List of pools by System Name that a user has access to in Portfolio Optimizer.	Collection of string	None.
portfolioOptimizerRights	List of APO rights user has by System Name. Valid values are PortfolioLoad, PortfolioSave, ScenarioLoad, or ScenarioSave.	Collection of string	None.
reportingRights	What reporting right a user has by System Name. Valid values are None, Refresh, AllRights.	string	None.
resourcePool	System Name of the pool the user belongs to.	string	None.
securityLists	List of security lists the user has.	Collection of V2.SecurityList	None.
securityProfiles	List of security profiles the user has by System Name.	Collection of string	None.
showConfirmationMessages	Enables or disables the displaying of confirmation messages as the user successfully completes actions within the system.	boolean	None.
SchemaIdentifier		string	None.

V2.AccessGroup

Name	Description	Type	Additional information
accessGroupSystemName	SystemName of the access group.	string	None.

Name	Description	Type	Additional information
rights	Bitwise enum that represents rights available to the user in this access group. Access = 1, AddProject = 2, DeleteActivity = 4, DeleteProject = 8, ManageProcess = 16, ManageTeam = 32, MigrateProject = 64, ViewConfiguration = 128, EditConfiguration = 256, UserGroupAdministrator = 512, UserGroupMember = 1024.	integer	None.

V2.CustomLink

Name	Description	Type	Additional information
title	The custom link title.	string	None.
address	The custom link URL.	string	None.

V2.EmailNotification

Name	Description	Type	Additional information
warningDays	Number of days before specified notification dates to receive warnings.	integer	None.
reportFormat	Integer value that indicates if reports should be sent in plain text (0) or html (1).	integer	None.
emailDays	Integer that represents a bitwise enum to indicate what days to receive notifications. Monday = 1, Tuesday = 2, Wednesday = 4, Thursday = 8, Friday = 16, Saturday = 32, Sunday = 64.	integer	None.
assignmentNotifications	Integer that represents a bitwise enum to indicate what stages on a project to receive notifications for. Past = 1, Current = 2, Future = 4.	integer	None.
emailNotifications	List of notification event codes the user is subscribed to.	Collection of string	None.

V2.ExtendedField

Name	Description	Type	Additional information
systemName	SystemName of the extended field.	string	None.
value	String that contains the value of the extended field.	string	None.

V2.SecurityList

Name	Description	Type	Additional information
systemName	SystemName of the Security List.	string	None.
securityListNodes	Array of Security List Node systemnames. Used to indicate what nodes a user has access to on each security list.	Collection of string	None.

Example JSON Format

Below is an example JSON body of our user extension.

```
[
  {
    "schemas": [
      "urn:ietf:params:scim:schemas:core:2.0:User",
      "urn:ietf:params:scim:schemas:extension:sopheon:2.0:User"
    ],
    "id": "sample string 13",
    "active": true,
    "addresses": [
      {
        "primary": false
      }
    ],
    "displayName": "sample string 2",
    "emails": [
      {
        "primary": false
      }
    ],
    "entitlements": [
      {
        "primary": false
      }
    ],
    "groups": [
      {
        "primary": false
      }
    ],
    "ims": [
      {
        "primary": false
      }
    ],
    "locale": "sample string 3",
```

```
"name": {},
"nickName": "sample string 4",
"password": "sample string 5",
"phoneNumbers": [
  {
    "primary": false
  }
],
"photos": [
  {
    "primary": false
  }
],
"preferredLanguage": "sample string 6",
"profileUrl": "http://webapihelppage7.com",
"roles": [
  {
    "primary": false
  }
],
"timezone": "sample string 8",
"title": "sample string 9",
"userName": "sample string 10",
"userType": "sample string 11",
"x509Certificates": [
  {
    "primary": false
  }
],
"urn:ietf:params:scim:schemas:extension:sopheon:2.0:User": {
  "accessGroups": [
    {
      "accessGroupSystemName": "sample string 12",
      "rights": 1
    }
  ],
  "allowMyProjectPageUpdates": false,
  "customLink1": {
    "title": "sample string 13",
    "address": "sample string 14"
```

```
,
"customLink2": {},
"customLink3": {},
"customLink4": {},
"customLink5": {},
"dateFormat": "M/d/yyyy",
"emailNotifications": {
  "warningDays": 0,
  "reportFormat": 0,
  "emailDays": 0,
  "assignmentNotifications": 0,
  "emailNotifications": [
    "sample string 15"
  ]
},
"enableAutoSearchOnProjectCreation": false,
"expirationDate": "2021-09-21",
"extendedFields": [
  {
    "systemName": "ExtendedFieldNumber1",
    "value": "100"
  }
],
"functions": [
  "sample string 16"
],
"portfolioOptimizerAdditionalPoolRights": [
  "sample string 17"
],
"portfolioOptimizerRights": [
  "sample string 18"
],
"reportingRights": "sample string 19",
"resourcePool": "sample string 20",
"securityLists": [
  {
    "systemName": "sample string 21",
    "securityListNodes": [
      "sample string 22"
    ]
  }
]
```

```
        }
      ],
      "securityProfiles": [
        "sample string 23"
      ],
      "showConfirmationMessages": false,
      "schemaIdentifier":
        "urn:ietf:params:scim:schemas:extension:sopheon:2.0:User"
    },
    "externalId": "sample string 12"
  }
]
```


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