Sopheon Accolade®

Process Design - Custom Page Design Training Guide

Version: 16.1

About Sopheon Accolade®

Document Name:	Process Design - Custom Page Design Training Guide
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Contents

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
Sopheon Accolade What's New in This Release	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.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	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
- Template Access

Terms and Concepts

- Metrics and Matrices
- Reports
- Quick Grids
- Global Links

Related Training Modules

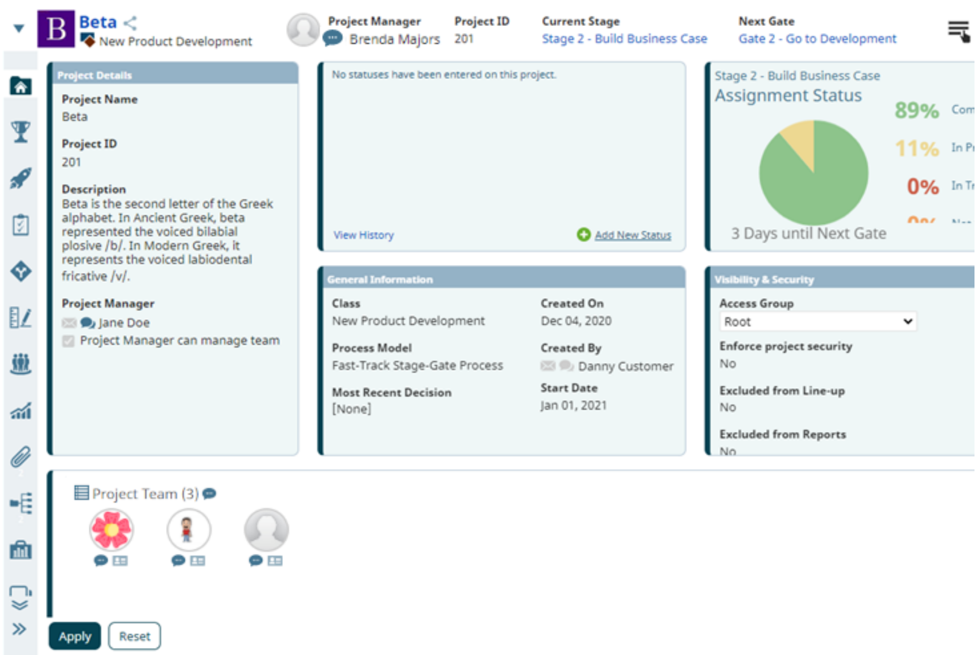
- Process Design Overview
- Metric and Matrix Design
- Deliverable and Activity Design

Although you can create a custom Accolade page using a page layout and come back and populate its contents later, it is helpful to have the components such as metrics, quick grids, and reports also configured prior to building the layout of the page. Having these items configured helps when previewing the page as you are building the design to ensure items display as intended.

Administrators with Template Access can also complete the tasks described in this module.

Page Layouts and Pods Overview

Administrators and Process Designers who have template access can design and save custom Accolade page layouts that can be assigned as pages within a project, or as a page that displays as a global link within Accolade.



The communication options may vary, in the image above, due to your organization's team collaboration setup. See Team Collaboration Overview for more information.

Use page layouts to design pages such as a project dashboard that displays when opening a project, or a landing page that displays when Accolade opens. Page layouts contain one or more pods to display information and are associated with a process model for display in a project.

The layout serves as a container that holds various pods that contain elements defined within Accolade, such as:

- Content accessed from a global link, such as dashboard or report created with Dashboards for Accolade.
- Content accessed from within a project, such as quick grids to capture or surface pertinent information or reports track action items for a project.
- Images, such as Innovation Planning views or prototype images.
- Read-only metric values.

Pods are placed in the layout and can be re-sized to contain the data within the pod and positioned appropriately on the page.

Building Custom Page Layouts Best Practices

Keep the following set of best practice recommendations in mind when building custom page layouts for your projects:

- **Existing Accolade Project Page Layouts** - The system includes active layouts that can serve as project pages, and contain pods that allow users to view and edit project and gate information as necessary.
  - The **Project Home** layout, that is automatically associated with process models on model creation and serves as a project's home and details page.
  - The **Project Gates** layout, that is automatically associated with process models on model creation and serves as a project's gates pages.
  - The **Project Time View** layout, which can be manually associated with a process model on model creation, and provides a high level view of the work to be completed on a project.

  If you wish to customize these layouts to fit your company's purposes, Sopheon recommends creating copies of these layouts to customize them instead of modifying the system layouts directly, to ensure you do not lose the original layout pods and format. You will not be able to return to the original system layouts without contacting a system Administrator who can run a script to re-add the layouts.
- **Personalized Home Page Configuration** - Accolade also includes layouts designed for use as customized home pages. While users can set their preferences for the information displayed in their individual view without having to configure the layout, Administrators and Process Designers with the Template Access role can make changes to home page layouts on a global level through the layout and pod configuration, for example, to add company landing page hyperlinks to the Quick Links pod for all users, or to add additional information at a company level.

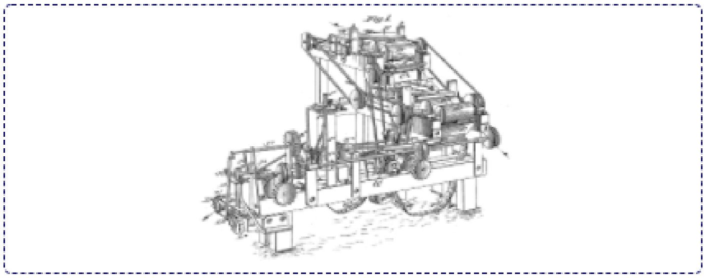
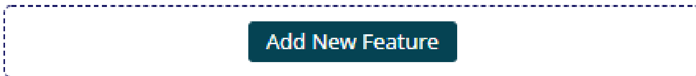
  Important! Do not delete these layouts. You will not be able to undo this action, and will have to contact a system Administrator who can run a script to re-add the layouts.

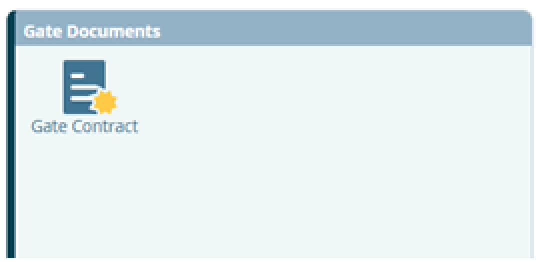
- **Know the Effects of Replacing Standard Project Pages** - If you replace a standard project page with a custom project page, some functionality for users on projects may be lost. The information for the standard **Home** and **Details** pages are available in pods included in the system **Project Home** layout. Additionally, all functionality for the standard **Gates** page is included in the system **Project Gates** layout. However, functionality on other standard project pages may not be available to display in pods on page layouts.
- **Consider Information Type and User Needs** - When building custom project pages, particularly for project pages that users access frequently for information such as the home and gates pages, understand what users on projects need visibility into and how this maps to available pod types. For example, allow team members to view and update project statuses by including the Project Status pod in the layout.

Available Pod Types

Page layouts can contain one or more pods to display information. Each pod can contain a single element, such as one metric, one global link, or one image. Review the following information about the types of pods available and their potential uses.

Pod Type	Notes
Advanced Platform	Adds a pod to save JavaScript and HTML files to execute functions and features in a layout at a global or project level. The editor options will not display until the pod is added to the layout and the layout is saved. To add or write a JavaScript file or HTML file select from the following options: • **To add an existing file** - Click to open the editor dialog and click to upload the desired HTML or JavaScript file. Click **Open** to add the file. • **To edit an existing file or create a new file** - Click to open the JavaScript editor, write or update the code for the file directly in the editor, and click **Save** or **Save and Close**. Click in the editor to launch the WebAPI help. Click to delete the JavaScript file or HTML file. Selecting a different pod type will remove JavaScript and HTML files. Download and save the files before making changes to the pod.
Buttons	Adds a button to a layout, such as a button within a portfolio that can be clicked to directly create a new project or project links. Enter the name of the button in the **Button Text** field when creating the pod. Select from the following options: • **Add New** - Creates a button that, when added to a global or project page layout, can be clicked to create projects and/or project links directly from the page. Click when defining the pod to select a process model and process links as necessary. Note that project links cannot be created for pods used on a global layout. EXAMPLE Example

Pod Type	Notes
	  Multiple Add New pods can be used on a layout, each with different combinations of process models and link types. • **Create Child Project** - Creates a button that, when added to a project page layout, can be clicked to create a new project directly from the page. EXAMPLE Example  **Note:** The **Create Child Project** button is part of Ideation. The ability to add a new project using the **Add New** or **Create Child Project** button on a project page requires Add Project rights for the default access group (if one is assigned) or for the parent project's access group (if there is no default access group specified).
Chart	Adds a pod that contains a chart created using Accolade. Charts are visual representations of the data within a report.

Pod Type	Notes
	In order to add a chart to a pod, the chart must be set as **Available to Configuration** and the chart access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the chart to be available for them to use in the layout. Viewing a chart's contents within a page layout does not require Reporting Rights; however, a user must be an owner or have at least one matching user role for the chart to display.
Documents	Adds a pod that contains document types pertaining to a single project when the layout is included as a page within a project. The **Gate Documents** selection includes a pod that contains gate documents that display on a project. Gate owners and those with appropriate editing rights can upload and download versions, download and edit the associated template, and select which version to publish. If a layout containing a gate documents pod is assigned to a specific gate, the associated gate documents display. If the layout containing the gate documents pod displays as a project page, the gate documents specific to the current project gate display. Example  **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected.
Gates	Adds a pod that contains gate information and capabilities for users on project teams. **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected. Select from the following options: • **Gate Readiness** - Provides a graphic that indicates the health of a project stage, to help determine at a glance how ready the project for an upcoming gate meeting. The pod includes the how many days until the next gate meeting and a status of the assignments with the current stage. Deliverables and activities are grouped together and considered "assignments" in this pod, and any item set to Not Required in the project is not included in the

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<tr><th>Pod Type</th><th>Notes</th></tr>
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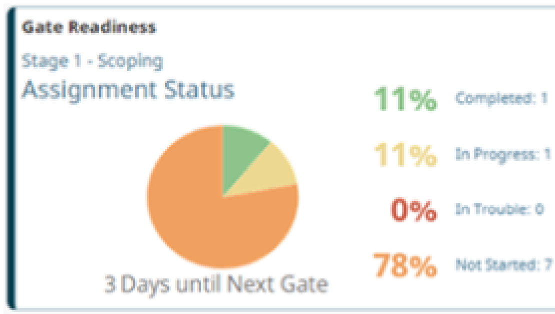
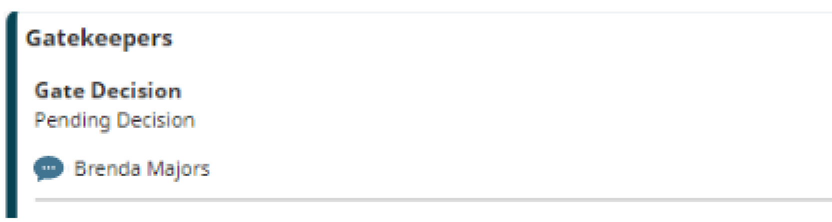
calculations. Deliverables set to In Trouble and Not Started are represented by a red and grey pie slice respectively.

EXAMPLE Example



Gatekeepers - Provides a place for various gate-specific information to be displayed. Gate owners can manage and update gatekeeper assignments as necessary from this pod. Additionally, gatekeepers can vote on gate decisions if gate voting is enabled, and can add or update comments regarding gate decisions. Gatekeeper votes and comments display as read only for others on the team. If gatekeeper skipping is allowed for the gate, gate owners can skip any gatekeeper vote decision.

EXAMPLE Example



Meeting Dates - Adds a pod that displays meeting information for a project. Gate names display with the meeting date below it. Users with rights to change gate dates such as Process Manager, Idea Managers, or Project Managers can edit meeting dates directly in the pod. All users on a project can see meeting information centrally located in this pod. Additionally, the gate name takes users to the corresponding gate page when clicked. Click when defining the pod to set the number of columns the meeting information displays. The pod information wraps from left to right across the pod to populate the columns set. Meeting date calculation settings and restrictions still apply.

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<tr><th>Pod Type</th><th>Notes</th></tr>
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Example

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<tr><td>Global Links</td><td>

Adds a pod that displays the content of a global link, such as an intranet page, a Dashboards for Accolade report, or a planning view from Innovation Planning.

Based on your server setup, only defined http, https, and relative file global links are available to add to a pod.

Important! Accolade respects web browser and web page security features for embedded global links. The linked web page may include certain security settings that prevent the web page from loading within the Accolade application window.

If you select an Innovation Planning view defined as a global link to display in a pod, and the layout is intended for use within a project page, select the **Filter to project** option to display the view filtered to the project ID saved as part of the global link configuration.

Note: The filter functionality does not apply to composite planning views.

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<tr><td>HTML Report</td><td>

Adds a pod that displays the content of a specified HTML report. Available HTML reports display in the **Content** field.

In order to add an HTML report to a pod, the report access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the report to be available for them to use in the layout.

Viewing a report's contents within a page layout does not require Reporting Rights, however, a user must be an owner or have at least one matching user role for the report to display.

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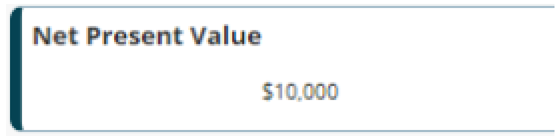
Pod Type	Notes
Metric	Adds a pod that can contain a single metric and displays the currently assigned metric value. Metrics within pods display as read-only. EXAMPLE Example  To include the metric's name, add the name as the title of the pod. **Important!** Long string metrics with the **Rich Text** check box enabled cannot be added to pods.
Planning View	Adds a pod that displays a planning view from Innovation Planning in read-only format to any user who does not have the Planner role. Click when creating the pod to define the planning navigation options that are displayed within the pod. Only planning views made public will display in the content drop-down for the pod. If the layout is intended for use within a project page, check the **Filter to project** option to display the view filtered to the project ID. The filter functionality does not apply to composite planning views.
Plugin	Adds a pod that displays a configured plugin. Click when defining the pod to set the properties, attributes, and default settings of the plugin.
Portfolio Optimization	Adds a pod that contains information typically used when creating layouts for portfolio optimization purposes. The **Projects Grid** selection includes information for all projects in the loaded portfolio that a user has access to, and that are included in a class with the **Include in Portfolio Optimizer** option selected. Click when creating the pod to define the default set of data columns that display in the pod.
Productivity	Adds a pod that contains productivity-related elements to assist with managing projects and timelines. **Important!** For pods that are used in the personalized home page layouts, Administrators and Process Designers with the Template Access role can make changes to home page layouts on a global level by clicking when defining the pod, for example, to add

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<tr><th>Pod Type</th><th>Notes</th></tr>
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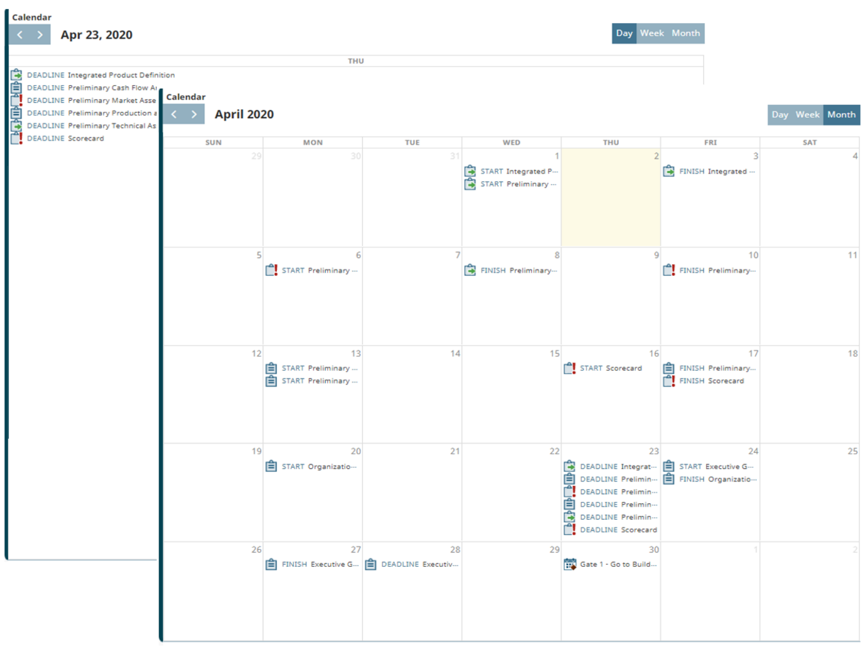
company landing page hyperlinks to the Quick Links pod for all users, or to add additional information at a company level. Changes at an individual level should be made by the user from within their personal view.

Select from the following options:

- **Calendar** - A pod that displays a calendar, allowing users to visually display important dates such as start and end dates for deliverables and activities, deadline dates for workflows, and project gate dates. Double-clicking on an event takes the user directly to the event details or applicable project page.

  Example



- **Countdown** - A pod that allows users to display a countdown of days until the occurrence of an important date or event of their choosing. Click when defining the pod to set the event name and date, and to select an image to display in the pod.

  Example

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<tr><th>Pod Type</th><th>Notes</th></tr>
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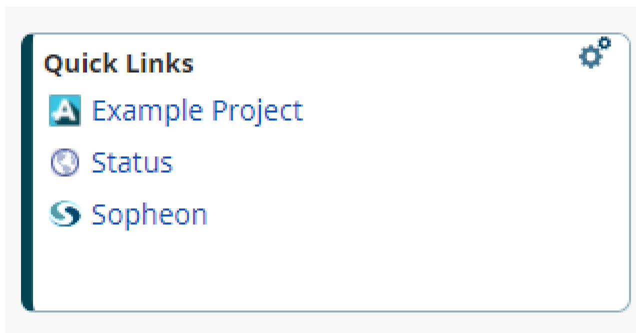
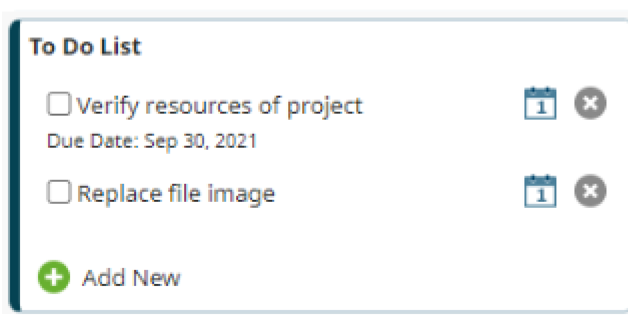
- **Quick Links** - A pod that allows users to display a list of frequently used links to projects, websites, and other global links defined in Accolade. Click when defining the pod to select existing Accolade links, or to create customized links.

EXAMPLE Example



- **To-Do List** - A pod that allows users to create individualized worklists by adding tasks to a personalized list, in order to keep track of their tasks and check off items as they are completed.

EXAMPLE Example



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<tr><th>Pod Type</th><th>Notes</th></tr>
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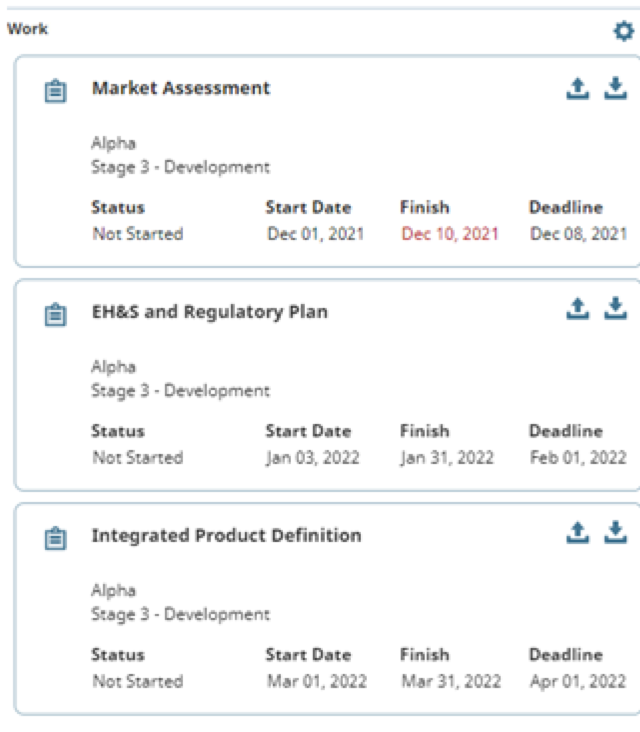
- **Work** - A pod that allows users to display detailed card views of deliverables and activities, gates, ideas, project work, or workflows associated with their project. Click when defining the pod to specify the default information that is displayed, apply filters, and set the desired sorting. When the pod is displayed on a project, users can click to apply their own view, filter, and sort options.

  EXAMPLE Example



Adding the Work pod to a project displays information for just that project. The Work pod also displays on the **Comprehensive** and **Focused** home page layouts, the **My Work** page, and the **Upcoming Gates** page where it provides users with a view of everything assigned to them throughout Accolade. For more information, see Viewing Your Work.

</td></tr>
<tr><td>Project Image</td><td>Adds a pod that is populated with the project's assigned main image or the thumbnail image, based on your selection.</td></tr>
<tr><td>Project Information</td><td>Adds a pod that contains information about a single project when the layout is included as a page within a project.</td></tr>
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<tr><th>Pod Type</th><th>Notes</th></tr>
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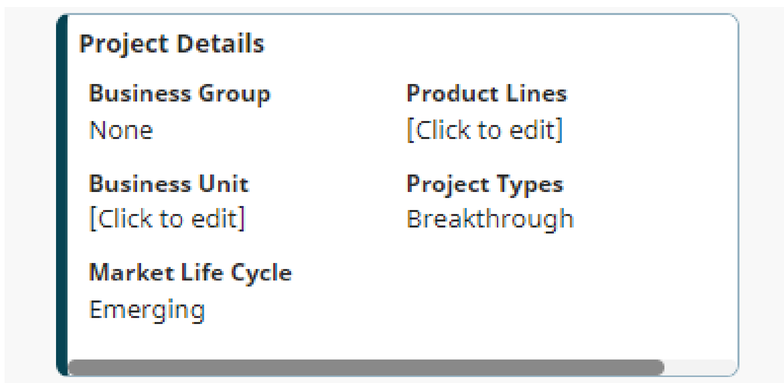
Note: These pods are not available for selection if the **Create global link** option for the layout is selected.

Select from the following options:

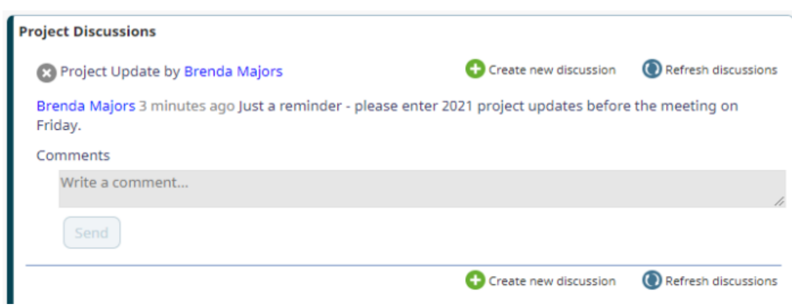
- **Data Form** - Provides a place to show and edit project metadata and metric information. Click when defining the pod to select the project metadata fields and metrics to include in the pod and define how many columns the pod contains. When the pod displays in a project, metric and metadata fields are editable based on a user's role and permissions within the project, unless the data is checked as read only. Long string metrics with the **Rich Text** check box enabled cannot be added.

  EXAMPLE Example

- **Discussion** - Includes a pod that includes the Accolade discussions functionality, providing contributors to discuss ideas directly on the page.

  EXAMPLE Example

- **Links** - Provides a pod which supports adding and removing links. Click when defining the pod to indicate the Link Name, Process Models and filters used to identify the linkable items to be presented to the user, as well as the

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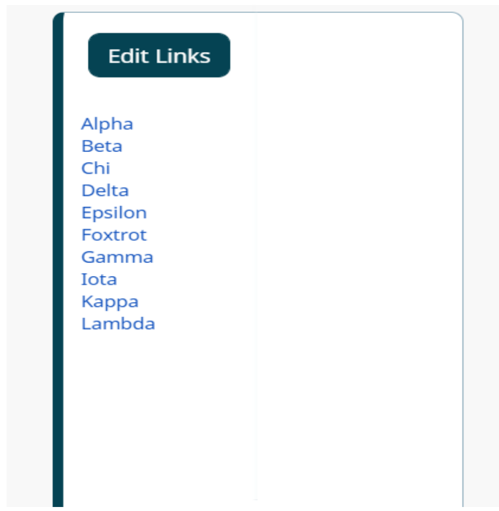
button text and a tooltip. When used, the pod shows any items already linked, and allows the user to select new items to be linked, as well as offering the possibility to remove links. Only items matching the filters set by the Process Designer are shown to the user. If desired, you can indicate that filters may be changed at runtime by the user.

Example


Portfolio Project List - Includes a list of all projects that are part of a portfolio or campaign.
Project History - Provides a place to view a project's history including a fixed list of events recorded as users make changes on the project. Users with access to the project have access to the project history. Project history includes, but is not limited to, gate decisions, status reports, stage advancement, and currency updates. Click when defining the pod to select filter criteria determining what displays on the pod. Only project history meeting the filter criteria displays on the pod. Users on projects can still filter project history when the layout displays on a project page, but they cannot save their filter preferences when filters are set on the pod configuration.

Example

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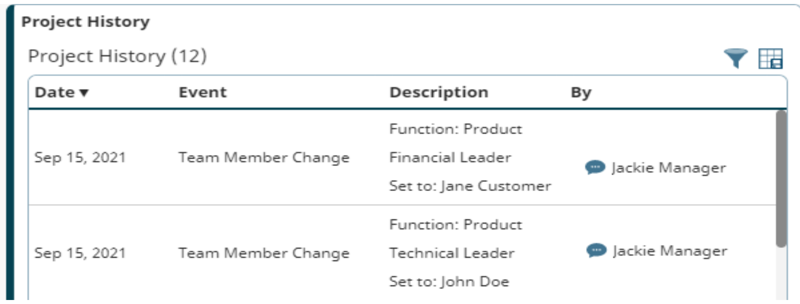
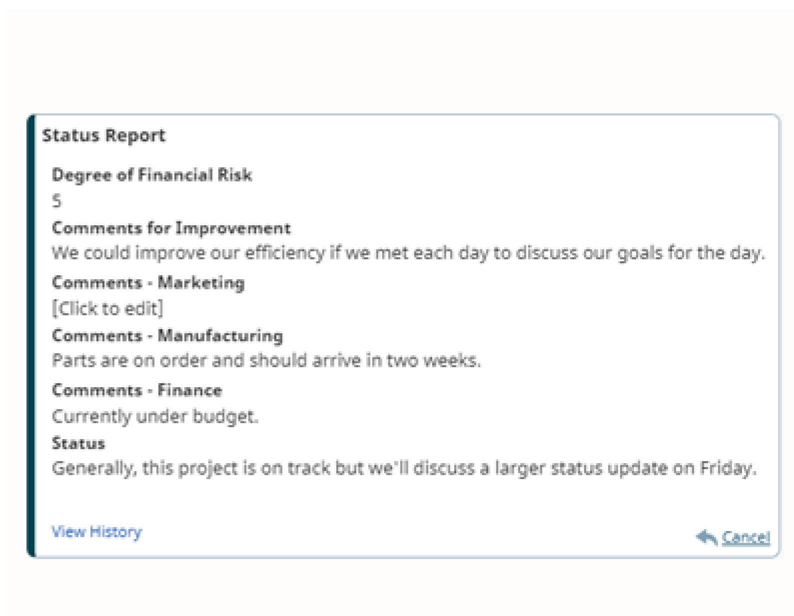
Pod Type	Notes



- **Project Status** - Provides a place to show and enter status reports for the project. The pod also provides a link to view the project status history. To allow the entry of new project status reports, select the **Use master buttons** option on the layout that contains the pod. If the master buttons are not included, the content of the project status pod displays as read only.

  When the pod displays in a project, the ability to add a project status is based on the user's roles and status permissions on the project team. Metrics are editable based on the metric's presentation settings for **Status Report** within the process model.

  EXAMPLE Example



- **Report List** - Provides a list of available reports to add to the pod. Click when defining the pod to select the reports list that displays. See Associating Charts and Reports to Process Models for more information.

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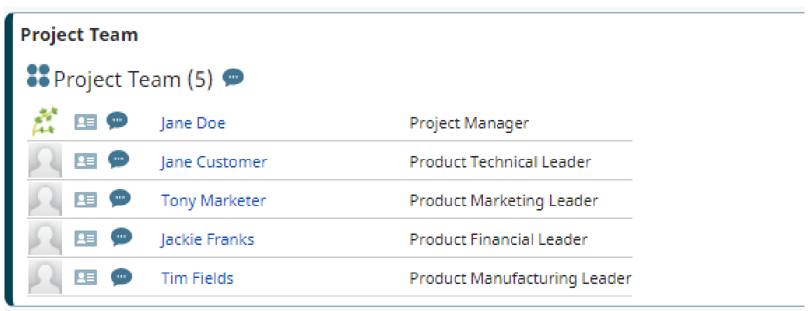
- **Security List** - Provides a place to display and edit defined security lists. Click when defining the pod to select the security list that displays. Only one security list can be selected to display in a pod. Users with certain management rights and allowed access can modify the security list when the layout displays on a project. Additionally, users can only modify levels of a given security list to which they have access. Other levels of the security list display as read only in the pod.
- **Team** - Provides a place to display users assigned to projects including project manager or team leader, project team members, workflow action owners, and gatekeepers. Click when defining the pod and select Project Team, Workflow Action Owners, or Gatekeepers. Only one group of users can be selected to display per pod.

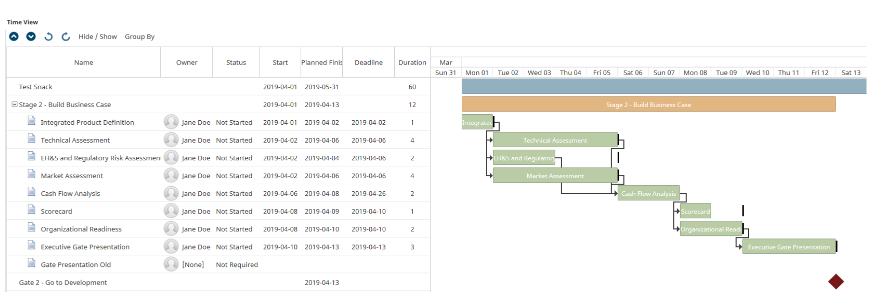
  If the **Enable User Profile Images** is disabled, the **Detail View** becomes the default view. Click and in the top left corner of the rendered pod to toggle between simple and detail views.

  Example



- **Time View** - Provides a place to visually view all the work, including deliverables, activities and gates for the entire project over the course of time.

  Example



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<tr><th>Pod Type</th><th>Notes</th></tr>
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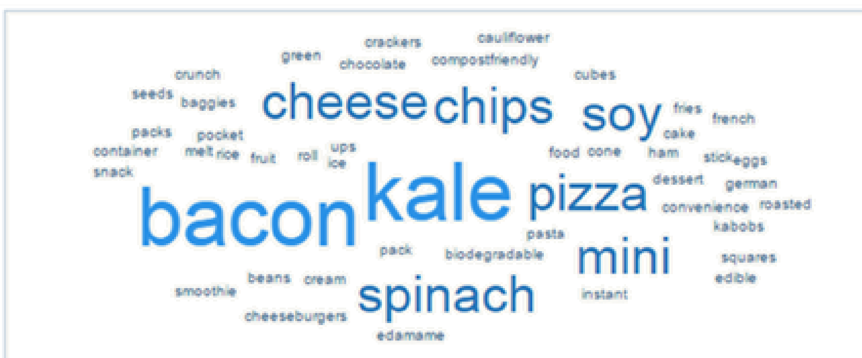
- **Trended Number Metrics** - Provides a way to display trended metric data in a pod with a layout. Pod settings provide options to set metrics and trended metric dates that display in a table. For portfolios, number metrics with Track History turned on are trended for projects linked with hierarchy relationships. Differentials between numeric metric values are calculated and displayed in number and graphic format. Table data displays in a Line Chart Trends chart. The table and chart can be included in a PowerPoint template, and is included when downloading and refreshing the presentation.
- **Trended Metrics Table** - Provides a way to see metric changes over time. Metric values display for each selected metric for each project in the portfolio or for the displayed project. This can be helpful for viewing trends in a portfolio to help identify problems and track the health of a project.
- **Word Cloud** - Provides a graphic that surfaces keywords from the name and description of the project and all the projects contained within a parent project. Each word displayed in the graphic is linkable to Quick Search to display project results containing the keyword. Use this pod in idea campaigns to provide visual interest and a way to display trending terms in ideas submitted to the campaign. Words appearing more often are larger and more prominent. The words in the pod display in variants of pods content font color.

  EXAMPLE Example



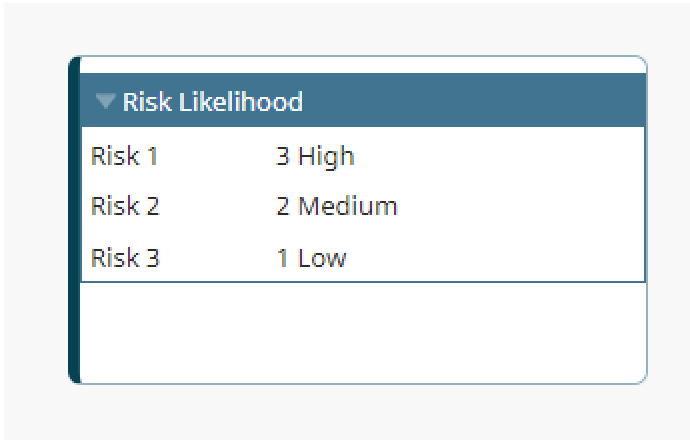
</td></tr>
<tr><td>Quick Grids</td><td>

Adds a pod that contains a quick grid assigned to a project.

Only active quick grids are available to add to a pod. Process Managers and Idea Managers with Manage Process rights, and a project's assigned Project Manager, have access to enter data in a quick grid within a pod displayed within a layout-generated page in a project. Click when defining the pod to enable **Read Only Quick Grid**. Quick grids set as read only can not be edited.

EXAMPLE Example

</td></tr>
</table>

<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>

Note: Matrix quick grids added to a pod do not contain filtering options at this time.</td></tr>
<tr><td>Report</td><td>Adds a pod that contains an Accolade online report.

In order to add a report to a pod, the report must be set as **Available to Configuration** and the report access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the report to be available for them to use in the layout.

Viewing a report's contents within a page layout does not require Reporting Rights; however, a user must be an owner or have at least one matching user role for the report to display.

Configure additional settings available for report pods including a download option and page size.</td></tr>
<tr><td>Report Groups</td><td>Adds a pod that contains the content settings for a comparison view layout.

Click when defining the pod to select the reports and charts available to a comparison view page layout.

Note: The report groups pod is created as a part of creating a comparison view page layout, and is not independently available at this time.</td></tr>
<tr><td>Task Board</td><td>Adds a pod that displays a project's current stage's task board. This task board categorizes all deliverables and activities into columns with respect to their current statuses, namely “Not Started”, “In Progress” or “Completed”, allowing you to follow the progress of each deliverable and activity more efficiently, and easily move them between statuses. With this task board, team members get a visual representation of their work in a more collaborative view, and are able to identify bottlenecks quicker.</td></tr>
</table>

Pod Type	Notes
Template Image	Adds a pod that displays an image saved to the Template Library (with a template type of **Image**). To add a new image select **Add New** from the **Content** list. Items added here are also added to the Template Library.

Creating Page Layouts

Administrators and Process Designers with the Template Access user role can design custom layouts to surface project information, such as a project dashboard page that displays when opening a project. Page layouts can contain one or more pods to display information such as project metrics, content accessed from a global link, charts or reports data, quick grids, and more. Layouts can be added as a global link within Accolade or associated with a process model for display within a project.

To create a page layout:

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

   To narrow the layout list, search by the layout name, system name, or category.

2. Do one of the following:

   - **To create a new page layout** - Click **Add New** in the upper right corner of the page.
   - **To edit an existing page layout** - Click the name of the layout to open it for editing.
   - **To create a layout based on an existing layout** - Click in the **Copy** column to create a copy that can be used as a base to build a new layout.

   The system includes active layouts titled **Project Home** and **Project Gates** that can serve as a project's home and details page, and project gates pages. Copy the layouts to customize them further instead of modifying the original system layouts, ensuring you do not lose the original layouts' pods and format.

3. Enter the following information to identify the layout:

   Required fields display with **red** text and an asterisk * if the field is empty.

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the layout.
System Name	Enter a unique, shorter name that identifies the layout in queries, reporting views, field codes, and other places in Accolade. The name must be unique among layouts and can contain only letters (English alphabet), numbers, and the underscore.
Icon	Select the icon and icon color to be used for the layout.
Description	Enter a description of the purpose or nature of the layout. This description helps other users identify the layout throughout the system.

Field	Description
Category	Enter or select the group to which this layout belongs. Use categories to organize like layouts together. For example, you may choose to group all the layouts used for global layouts into the same category, in order to separate them from layouts that are used in process model configuration. • Leave this field blank to add to the **Default** category. • To define a new category, select **New Category** and enter the category name. • To delete a category, remove every item from the category. Empty categories are deleted automatically. Layouts specific to project pages, configured based on process models on upgrade, display in an **Upgrade** category and are named based on the correlating process model.
Order	Enter a number to specify the page layout's place when it displays in a list of layouts. Lower numbered layouts display higher in the list. **Note:** Layouts set as active project pages will display before existing project pages to provide most relevant data first.
Active	Select this check box when the layout is ready to use. **Note:** If you deactivate a layout that is associated with a process model, the association remains; however, the projects based on the model no longer display the layout as a project page.
Create global link	Select if the layout's intended use is as a global link that is accessed from outside a project. When selected, a global link is created when you click **Save** or **Save and Close** in the layout editor. If this layout's intended use is as a dashboard or other page displayed in a project with project-specific information, leave this check box clear. After creating the layout, go to **System > Page Design > Global Links** to configure the global link.
Show project header	Select this check box to include the header portion of a project page when this layout displays within a project. For example, you may choose to not show the project header for layouts used to gather ideas and for idea campaigns.

Field	Description
	The default hides the header in layout pages.
Hide project menu	Select to remove the project details menu access from the layout on a project. Hiding the project menu removes the ability to: • access the communication options for email and chat. • migrate, copy, close, or delete a project from the layout.
Hide Navigation Breadcrumb	Select this check box to hide the hierarchy breadcrumb and menu from the layout on a project. For new layouts, this option is unchecked by default.
Show process graphic	Select to include the process graphic when this layout displays within a project. The default hides the process graphic in layout pages. Select to show the graphic in projects that use layouts where it is important to show the stage the project is in.
Use master buttons	Select this check box to enable **Apply** and **Reset** buttons that save and reset changes to quick grid pods in the layout that are not set as read only. If unselected, **Apply** and **Reset** buttons are available to save or reset changes in each individual quick grid pod. If the **Read Only Quick Grid** advanced setting is enabled on a quick grid pod, no updates can be made to that pod regardless if master buttons are used.
Enable page filters	Select this check box to enable runtime filters that can be applied to all charts and reports pods in the layout. **Note:** In order to apply runtime filters, the selected reports must be set up with filters that have runtime filtering enabled, and the selected charts must be created from an online report with filters that have runtime filtering enabled. If unselected, filters may be available to be applied individually to charts and reports pods, but not to the layout as a whole. See the Viewing Charts and Reports topic in the Accolade online Help for more information on runtime filtering options.
Enable cycles	Select this check box to enable Charts on the layout. Chart Cycles can be enabled on any layout. Cycles allow you to look at the various charts based on a common metric, such as Region, Business Unit, Product Line, etc. Each

Field	Description
	chart configured for Cycles will re-render based on the selected Cycle value.
Add to new Process Models	Select to automatically associate the layout with **Gated**, **Non-Gated**, and/or **Idea** process models when new process models are created. The layout defaults as checked in the **Pages & Layouts** section on the **Pages** tab of a new process model and is useful when wanting to include the layout as a default project page.
Page width	Select how the page layout width is determined. • Select **Autofit** to display the page to fit the pods and pod contents left aligned. • Select **Fixed** and enter the width of the layout in pixels to have the page display with a forced width.
Fill page	Select to expand the height of the lowest pods in the layout. The pods extend to fill the remaining space on the layout if the layout does not already scroll on a page. If the layout scrolls, the lowest pods do not expand.
Alignment	If you set the page width as **Fixed**, select the layout alignment as **Left**, **Center**, or **Right**.
Margin color	If you set the page width as **Fixed**, click the color block next to the field and select a color to apply to the margin width of the layout.
Background color	Click the color block next to the field and select a color to apply to the background of the layout.
Configuration Access Groups	Select the access groups to which the layout belongs. Process Designers with matching permissions will be able to edit and view the layout or the data within its pods. The access groups displayed are based on the current user's access group permissions and the access groups the layout belongs to.
Process Model Usage	*(Only available when editing an existing layout)* Click the **Process Model Usage** button to see the list of process models that the layout is associated with. The list includes all process models the layout is included in, as well as links to the process model's component tree pages that you have Edit access to.

4. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.
5. Continue with any one or more of the following steps to complete and implement the layout:
   - Add one or more pods or comparison sets to the layout. Without at least one pod, the layout is blank.

- Associate the layout with one or more existing gated, non-gated, or idea models to include it in projects based on that model.
- Add the layout as a global link to display the page outside of a project.

Notes:

- To delete a layout, click in the **Delete** column on the Layout page. If you delete a layout that is used as a global link, the global link is also automatically deleted.

  Important! Do not delete system layouts used for personalized home pages. You will not be able to undo this action and will have to contact a System Administrator to run a script to re-add the layouts.

- Copying layouts containing the Advanced Platform pod will not copy the JavaScript or HTML files. Save the copied layout then add or upload the JavaScript and/or HTML files.
- The filter icon will not appear in a layout's charts or reports pods if there are no filters available for users to apply to the contents.

Exercises - Creating Page Layouts

Try out what you have learned!

- Create a page layout that contains a metric pod.
- Add a project image pod to the same layout.
- Add a project information pod that contains a Word Cloud to the same layout.
- Preview your layout to ensure that you like the colors and adjust them as necessary.
- Ensure your layout is active. You will use it in the next set of exercises.

Adding Pods to Page Layouts

Page layouts contain one or more pods to display information such as project metrics, content accessed from a global link, quick grids, charts, reports, and more. Pods are the building blocks used to display content within a page layout.

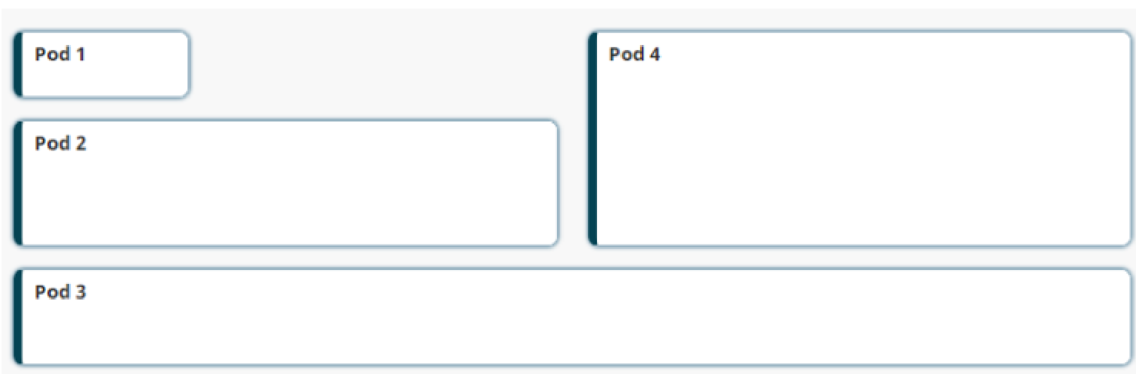
> **Note:** When viewed, if a user does not have access to the content assigned to a pod within a layout, the message "No Data Available" displays in that portion of the layout.

To add a pod to a layout:

1. From the **System** menu, select **Page Design > Layouts**.
2. Create a new page layout or open an existing layout.
3. Click **[Add Pod]** at the top of the **Layout** section to add a pod to the layout.

   The blank pod is added to an available space within the layout. Click and drag the lower right corner to re-size the pod. Click anywhere in the pod and drag the pod to move it to a new location.

   Pods are arranged in the layout in a grid that is 12 columns wide. A single pod can span one or multiple columns.



4. Select the pod to define its contents and style in the **Pod Details** section:

Pod Details	Description
Type	Select the general type of content that displays within the pod. The type narrows down the pod contents available and correlates to an action or area of the application. If you select an Innovation Planning view defined as a global link to display in a pod, and the layout is intended for use within a project page, select the **Filter to project** option to display the view filtered to the project ID saved as

Pod Details	Description
	part of the global link configuration. The filter functionality does not apply to composite planning views. See "Available Pod Types" on page 8 for information about the types of pods available.
Content	Select the content to display in the pod. The list available in the content field is narrowed based on the **Type** selected. For example, if Quick Grids is the pod **Type**, only quick grids display for selection. Some pod content selections also include advanced settings options to be defined, such as selecting default information that displays in a pod. **Note:** The available content that displays for selection is based on your access group permissions as defined in your user profile. Only elements that the user has "Can Edit" access for, are in a child access group of the layout, or are already attached to the layout will be available for selection. Additionally, access group settings for the content selected must match the permissions of other users in order to display for them.
Name	*(Optional)* Enter a name that displays as a heading above the pod. If a pod does not have a name, the pod displays in the layout without a heading. If **Buttons** is selected as the pod **Type**, this field changes to **Button Text**, where you can enter text that displays within the button shape.
System Name	Enter a unique, shorter name that identifies the pod in queries, reporting views, field codes, and other places in Accolade. The name must be unique among layouts and can contain only letters (English alphabet), numbers, and the underscore.
Allow maximization	Select the check box to display the maximize icon on a pod. The maximize / minimize capability is only available for pods that have a heading defined on the pod, and appropriate icons display for users to render the pod larger or smaller.
Show Download Icon	*Setting only available for report pods containing Accolade online reports.* Select the check box to display the download icon and make the report available for download from within page layouts.

Pod Details	Description
Page Size	*Setting only available for report pods containing Accolade online reports.* Enter the number of report rows to display within the pod. The report will page within the pod for subsequent rows. Maximum number of rows is set to your Reporting Office Extensions Record Limit parameter (default 50,000).
Title	
Text Alignment	Select an alignment option to position the pod title. Text defaults as Left aligned.
Font size	Enter the title font size in pixels.
Font color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the font color for the title. **Note:** If the pod contains a quick grid, the font color defined on the quick grid configuration overrides the font color set on the pod. If no font color is defined on the quick grid, the font color defined for the pod applies.
Content	
Font size	Enter the font size in pixels for the pod content text.
Font color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the font color for the pod content text.
Background color	Select a background color, enter a hexadecimal color code, or enter its RGB or HSV value to set the background color of the pod content.
Vertical Bar color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the background color of the vertical bar that displays on the pod.
Border	
Style	Select how the border displays around the pod.
Size	Enter the weight of the border in pixels.
Color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the border color.

As you are adding pods to the layout, click in the top right corner of the page to see what the layout looks like when applied to a page within Accolade. For project images, a placeholder image is included in the preview.

5. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.

Notes:

- To remove a pod from a layout, click in the pod within the Layout editor.
- If a long string metric value contains formatting, the formatting overrides the metric pod's styling defined in the layout.

Creating Comparison View Layouts

Administrators and Process Designers with the Template Access user role can design custom page layouts, such as a project dashboard page that displays when opening a project, that allows users to view and compare project data from current, scenario, and/or snapshot data sources. Comparison view layouts can contain one or more pods to display charts, reports, or planning views from these sources, and can be associated with a process model for display within a project or portfolio, or added as a global link within Accolade.

To create a comparison view layout, complete the following tasks:

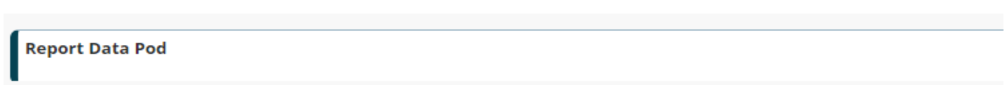
- Create a page layout that contains a comparison pod set.
- Configure the Report Pod settings.
- Associate the layout with a process model or add the layout as a global link.

Note: Prior to creating the layout, make sure that you have identified the charts, reports, and planning views to be used in the configuration of the report group pods. Note that these sources must be set as Available to Configuration and should include (but are not limited to) matching filter settings.

Comparison Pod Sets

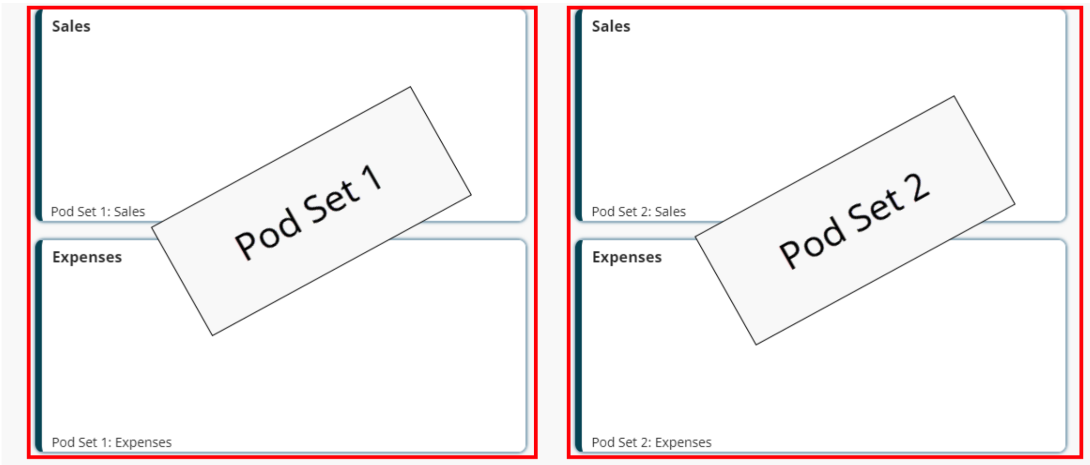
A comparison pod set is a set of pods that can be used to compare data from different data sources, and consists of the following components:

- **a Report Data pod** - The report data pod is automatically created for the set, and when displayed in the layout contains the controls for the view's report group selections and filtering.



Important! The report data pod must be included in the layout. Deleting this pod will delete all pods and report group settings that have been defined for the comparison pod set.

- **Two or more Pod Sets** - When creating the set, you can define the number of pod sets to be included in the layout. Each pod set includes **one or more pods** that display content that is specific to the report group selected for the set.



To add a comparison set to a layout:

1. From the **System** menu, select **Page Design > Layouts**.
2. Create a new page layout or open an existing layout.
3. Click **[Add Comparison]** at the top of the **Layout** section to add a comparison set to the layout.

   Note: Layouts can only include one comparison set, however you can add and define additional pods, for example adding a project status pod to a layout displayed within a project, to surface and display additional relevant information.

4. In the Add a Comparison Set dialog, enter the **Number of Sets** and **Number of Pods per Set** to be added to the layout.

   The **Number of Sets** is the number of pod sets that will show data for each data set. The **Number of Pods per Set** is the number of pods to be displayed for each set.

5. For each pod set, enter the following information:

Pod Details	Description
Set # Display Name	Enter the name for each pod set.
Pod #	For each pod, enter a name that will display as a label for the individual pod. The names for the pods are only open for editing in Set 1 to assist the user to compare similar data across the report sources. All additional sets will reference the same pod names.

Pod Details	Description
	Once the comparison set creation is complete, pod names can be edited by selecting the pod, and updating the corresponding **Name** field in the **Pod Details** section.
System Name	For each pod, enter a unique, shorter name that identifies the pod in queries, reporting views, field codes, and other places in Accolade. The name must be unique among pods and can contain only letters (English alphabet), numbers, and the underscore.

6. Click **Create** to add the comparison set and continue with formatting the layout pods before adding the report pod settings, or click **Setup Report Data and Groups** to continue with adding the report settings.

   Clicking **Create** adds a Report Data Pod and the combined sets and pods defined in step 4. Each pod will display a label in the lower left corner that indicates which set/pod it belongs to.

   Clicking **Setup Report Data and Groups** will open the Report Group Content Settings dialog to add the report group selections, starting with step 3. Once you enter the settings and click **Apply** in this dialog, the Report Data Pod and the combined sets and pods defined in step 4 are added to the layout. Each pod will display a label in the lower left corner that indicates which set/pod it belongs to.

7. Adjust the width, height, and position of all pods as necessary.
8. If not already completed, continue with adding the report pod settings.
9. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.
10. Continue with any one or more of the following steps to complete and implement the layout:
    - Associate the layout with one or more gated, non-gated, or idea models to include it in projects based on that model.
    - Add the layout as a global link to display the page outside of a project.

Adding or Editing Report Pod Settings

The report pod is where you set up the report group selections that control what data sources are available to the comparison view layout when viewed.

To add or edit report pod settings for a comparison set:

1. In the layout created above, select the Report Data Pod.

   Note that the **Type** and **Content** fields for this pod are pre-defined as **Report Groups**, and are read-only.

2. In the **Pod Details** section, click the Advanced Settings icon to open the Report Group Content Settings dialog for editing.

   You can also open the Report Group Content Settings dialog by clicking **Edit Comparison** to open the Edit Comparison Set dialog, and clicking **Setup Report Data and Groups** in the lower left corner of the dialog.

3. For each report group, enter the following information:

Report Group Details	Description
Display Name	Enter the display name that identifies the report group in the drop-down list.
Runtime Filter(s)	Select the runtime filter options from the drop-down list. Each report source may have different runtime filters defined. The drop-down list is populated with the filter options that appear in ALL report sources. For example, Report Source 1 has the filter **Project Name** = Alpha, and Report Source 2 has the filter **Project Name** = Beta. Since both report sources have a filter based on **Project Name**, this filter option will appear in the drop-down list.
Type	For each pod, select either **Chart**, **Online Report**, or **Planning View** as the datatype to be displayed within the pod.
Content	For each pod, select the name of the chart, online report, or planning view (as indicated in the **Type** field) to be displayed within the pod when the report group is selected.

4. Click and repeat step 3 to add additional report groups as necessary.
5. Click **Apply** to close the dialog.
6. *(Optional)* Update the **Name** and **System Name** for the pod, as necessary.
7. Adjust the width, height, and position of all pods as necessary.
8. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.
9. If not already completed, continue with any one or more of the following steps to complete and implement the layout:
   - Associate the layout with one or more gated, non-gated, or idea models to include it in projects based on that model.
   - Add the layout as a global link to display the page outside of a project.

Comparison View Best Practices

Chart, Report, and Planning View Selection - When creating and selecting reports, charts, and/or planning views to be included in a comparison view layout, be mindful of the data being displayed and how it will be used. The purpose of a comparison view is to allow users to view related sets of data, so ensuring that included reports, charts, and/or planning views include comparable metrics and filters will impact the usability of the view.

Additionally, make sure that your end user has access to the content that will be displayed in the view. If a user does not have access to the content assigned within a layout, that portion of the layout displays a "No Data Available" message.

Displaying Chart Legends within a View - If you are including charts in the comparison view design, it is recommended to include legends in at least one of the charts being setup, so users can easily identify the visualization being presented. If you are enabling runtime filtering of the view, it is recommended to include legends for all charts, as the filtering options may result in values being reflected differently in different pods.

Adding Pods to Views - Be mindful of the quantity of pods and pod sets added to a comparison view. Adding more than 2 pod sets or more than 2 pods per set can make the page exceed the space available for display within your screen, and may end up being more difficult to compare data values.

Enabling Runtime Filters within a View - Runtime filters options must be enabled BOTH on the report source (regardless of whether the report is displayed in the layout) AND enabled in the Report Group Content Settings dialog in order to be available for users.

Notes:

- To delete a comparison set (the report pod and all related pods/sets), select the Report Data pod and click in the pod within the Layout editor.
- To delete or edit a pod set or an individual pod within a set, click **Edit Comparison** to open the Edit Comparison Set dialog for editing.

  To delete a pod set, click next to the set display name.

  To delete a pod, click next to the system name of the pod to be deleted and click **Apply** to save your changes. Note that the pod will delete from all remaining pod sets.
- To delete or edit a report group, select the Report Data pod, click to open the Report Group Content Settings dialog for editing.

  To delete a report group, click in the corresponding report group section, and click **Apply** to save your changes.

Comparison View Example

Administrators and Process Designers with the Template Access user role can design custom page layouts, such as a project dashboard page that displays when opening a project, that allows user to view and compare project data from current, scenario, and/or snapshot data sources. Comparison view layouts can contain one or more pods to display charts, reports, or planning views from these sources, and can be associated with a process model for display within a project or portfolio, or added as a global link within Accolade.

Example Scenario

Consider this scenario: a portfolio manager wants to be able to review financial data for his portfolio, and wants to compare the current data against the same data captured in a snapshot taken at the end of the last fiscal year. In this view, the manager wants to be able to see a report with the individual data values, as well as a chart visualization of the information.

The following sections provide details on the setup for this scenario, as well as some common variations.

Preparation: Create the charts, reports, and planning views for use in the comparison view.

Before building the comparison view layout, the Process Designer starts with creating the charts, reports, and planning views to be used in the configuration of the report group pods. In this example, the projects being analyzed contain metrics that represent quarterly sales figures that will be represented in the configured charts, reports, and planning views.

For the comparison view data sources, the Process Designer has created the following:

- a report called **Live Data Report** that contains the financial data from the current projects, and a related chart called **Live Data Chart** that uses the live report as the source, and is a visualization of the current project financial data.
- a report called **Snapshot Data Report** that contains the corresponding financial data from last year's snapshot, and a related chart called **Snapshot Data Chart** that uses the snapshot report as the source and is a visualization of the snapshot project financial data.

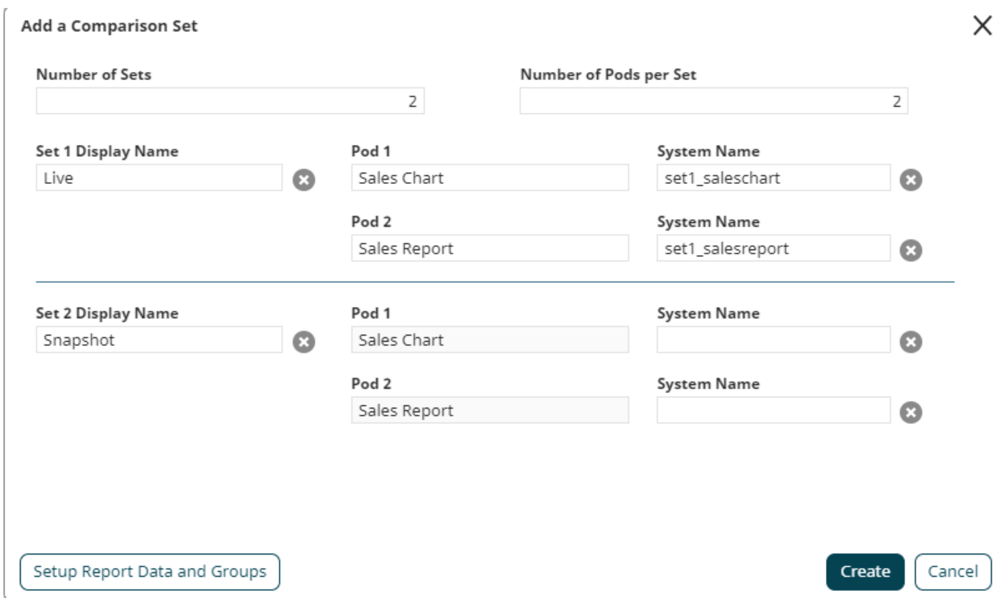
Step 1: Create a page layout that contains a comparison pod set.

For the initial layout creation, the Process Designer starts with creating the layouts and adding the appropriate layout settings as described in "Creating Page Layouts" on page 23.

To add the comparison pod set, the Process Designer makes the following selections in the Add a Comparison Set dialog:

- **Number of Sets** - The number of sets would be **2**, since the portfolio manager wants to be able to compare data from two different sources - the live data, and the snapshot data.

- **Number of Pods per Set** - The number of pods per set would be **2**, since the portfolio manager wants to view the report data and chart visualization for each source.
- **Set 1** and **Set 2 Display Name** - The set display names are used to identify the sets/pods combinations when the report groups are selected for display. In this example, they are generically named **Live** and **Snapshot**.
- **Pod 1** and **Pod 2** names and system names - These are named **Sales Chart** and **Sales Report** (with corresponding system names), to represent the type of content that will be displayed in the pod within the layout.



Step 2: Configure the Report Pod settings.

Since the comparison view includes multiple data sources - the live data, and the snapshot data - the view will need to have 2 corresponding report groups defined for the content displayed.

> It may be helpful to think of the report groups with regards to their relationships to the data source. For this example, one relationship is "Live Data", to include the live data report and the live data chart created above, but could also include any other reports/charts/planning views that are relevant to this dataset. The second relationship is "Snapshot Data", to include the corresponding snapshot data report and chart created above (as well as any additional reports, charts, or planning views). You could create a third option "Snapshot (Year XX) Data", that could include a different snapshot data report (such as one taken on a different date), and create related charts, and so forth. What is important is that they have comparable metrics - for example, "metric A" should have a value in each category - so they can be compared across the view.

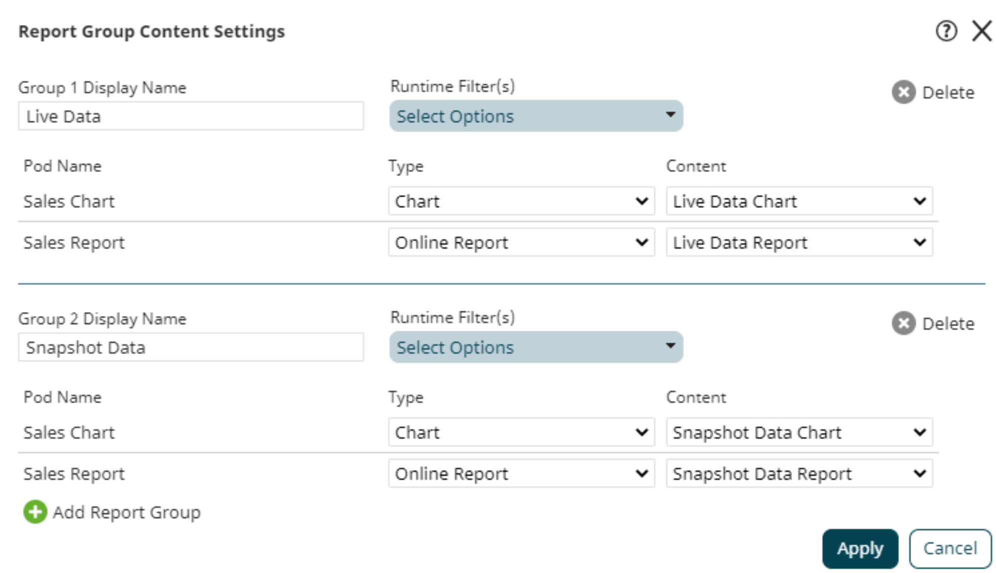
To define the report groups available to the comparison view, the Process Designer makes the following selections in the Report Group Content Settings dialog:

For the first report group:

- **Display Name** - This is defined as **Live Data**, to indicate that this group will display current project financial data.
- **Runtime Filters** - This example does not include run time filters, so no options are selected. See the example variations section below for more details.
- For the **Sales Chart** pod, the **Type** is defined as **Chart**, and the **Content** is defined as the **Live Data Chart** created above.
- For the **Sales Report** pod, the **Type** is defined as **Report**, and the **Content** is defined as the **Live Data Report** created above.

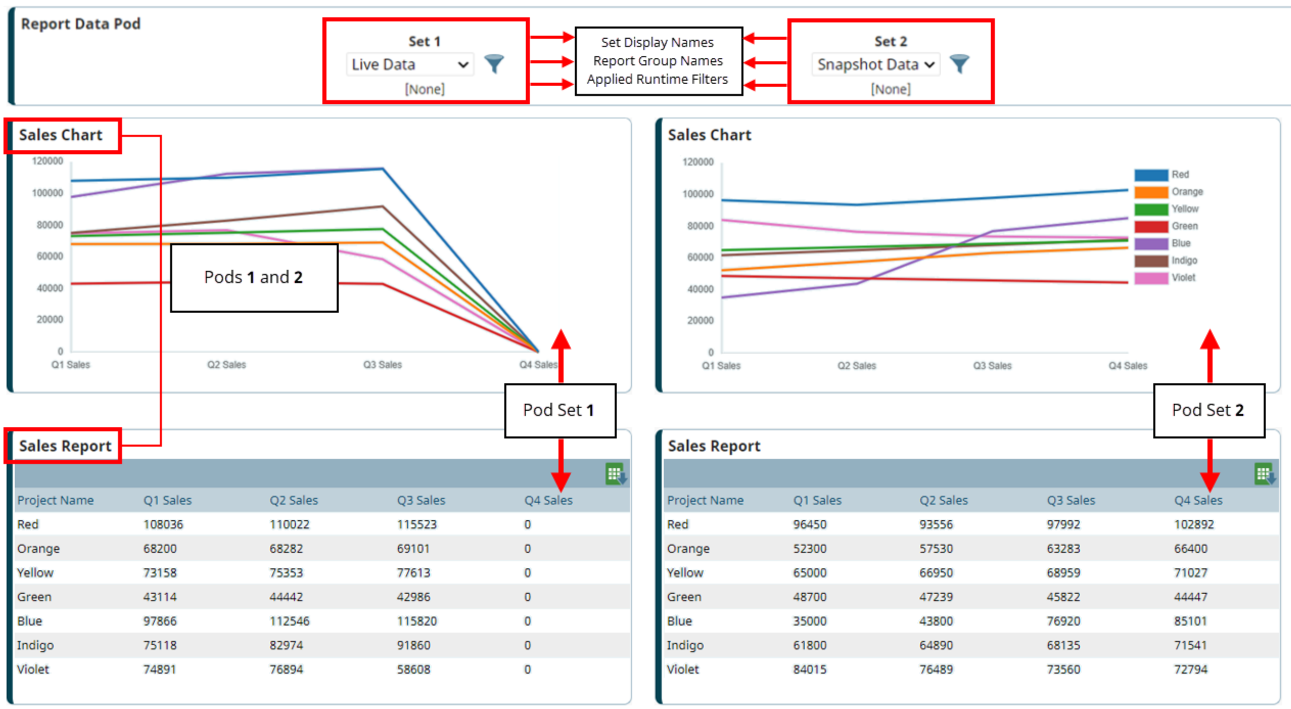
For the second report group:

- **Display Name** - This is defined as **Snapshot Data**, to indicate that this group will display snapshot project financial data.
- **Runtime Filters** - This example does not include run time filters, so no options are selected. See the example variations section below for more details.
- For the **Sales Chart** pod, the **Type** is defined as **Chart**, and the **Content** is defined as the **Snapshot Data Chart** created above.
- For the **Sales Report** pod, the **Type** is defined as **Report**, and the **Content** is defined as the **Snapshot Data Report** created above.



Step 3: Associate the layout with a process model or add the layout as a global link.

In this scenario, the portfolio manager wants to review the financial data for his portfolio of projects, so the layout will be added to the portfolio project process model and displays as a page within the project as follows:



Project Name	Q1 Sales	Q2 Sales	Q3 Sales	Q4 Sales
Red	108036	110022	115523	0
Orange	68200	68282	69101	0
Yellow	73158	75353	77613	0
Green	43114	44442	42986	0
Blue	97866	112546	115820	0
Indigo	75118	82974	91860	0
Violet	74891	76894	58608	0

Project Name	Q1 Sales	Q2 Sales	Q3 Sales	Q4 Sales
Red	96450	93556	97992	102892
Orange	52300	57530	63283	66400
Yellow	65000	66950	68959	71027
Green	48700	47239	45822	44447
Blue	35000	43800	76920	85101
Indigo	61800	64890	68135	71541
Violet	84015	76489	73560	72794

Example Variations

Using the same scenario above, here are some common variations to the comparison view layout setup.

Adding Runtime Filters to a View

Runtime filters allow the user to apply filters to the data when it is displayed. These filter options must be enabled BOTH on the report source (regardless of whether the report is displayed in the layout) AND enabled in the Report Group Content Settings dialog in order to be available for users.

The filter icon will not appear in a layout's charts or reports pods if there are no filters available for users to apply to the contents.

For this scenario, the Process Designer adds the following additional steps:

- In the Preparation section, the Region metric is added as a **Selected Filters** option for both the **Live Data Report** and **Snapshot Data Report** reports, and the **Runtime Filter** check box is selected to allow users to apply this filter to the report (as well as any charts that use this report as a source) when they are displayed in a layout.

- In the Configure the Report Pod settings section, the Region metric is selected as a **Runtime Filters** option for both the **Live Data** and **Snapshot Data** report groups.

Using Multiple Pods, Pod Sets, and/or Report Groups

Layouts can only contain one comparison set, but can contain multiple pods, pod sets and/or report group sources. Some alternate configuration options might include the following:

- Configuration of 3 pod sets, to compare data from a live source with different sets of snapshot data within the same view.

  For this variation, the Process Designer adds the following steps:

  - In the Preparation section, a report and chart would need to be created for use in the additional snapshot report group setup.
  - In the Create a page layout that contains a comparison pod set section, the **Number of Sets** value would be increased to **3** and the set information added for the additional pod set.
  - In the Configure the Report Pod settings section, a third report group would be added for the additional snapshot's report and chart.

- Configuration of pods with only charts for comparison, for example viewing a chart with sales and a chart with operating costs for comparison.

  Note that this also applies to configuration of pods with only reports for comparison.

  For this variation, the Process Designer adds the following steps:

  - In the Preparation section, the reports would need to be expanded to include all data to be displayed in the view, and individual charts would need to be created to visualize the relevant data.
  - In the Create a page layout that contains a comparison pod set section, the pod display names would be updated to reflect the data being displayed.
  - In the Configure the Report Pod settings section, the **Type** for each pod would be defined as **Chart**, and the **Content** defined as the chart to be displayed within the corresponding pod.

- Configuration of multiple report group sources without creating new pod sets, for example to allow users to select from multiple report group sources without expanding the layout display.

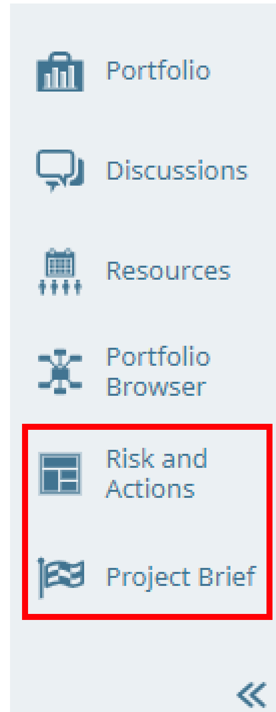
  For this variation, the Process Designer adds the following steps:

  - In the Preparation section, a report and chart would need to be created for use in each additional report group setup.
  - In the Configure the Report Pod settings section, each additional report group would be added with its respective report and chart.

Adding Page Layouts as Project Pages

For a page layout to be included as a page within a project, you must add the layout to a process model as a visible tab within the project. If you have created a page layout that represents a project dashboard, you can set the layout page as the initial page to display within a project.

To add a page layout as a project page:



1. From the **Process** menu, select **Models** and select the model to edit.
2. Click the **Pages** tab and navigate to the **Pages & Layouts** section.

   The current list of available page layouts is displayed.
3. *(Optional)* If there are additional custom page layouts that are not included in the list, click and use the following options to add the additional layouts to the list.
   - To narrow the layouts list, search by the layout name, system name, or category.
   - Highlight the layout name(s) in the Available Layouts window and click **Select**, or double-click each layout's name to move them from the **Available** list to the **Selected** list.
   - Click **Clear** in the to remove all layouts from the list of available project pages.
   - Click **Done** to exit the dialog.
4. Choose one or more of the following selections to define the project page display options:

Field	Description
Landing	Select the project page that opens initially when a user goes to a project based on this model. The page you select as the landing page determines the entry project page for users even if that page is not selected to be visible.
Visible	Select which pages are available for viewing in a project based on this model. By default, active system layouts, such as **Project Home** and **Project Gates**, display at the top of the project navigation pane. All other custom project pages created using layouts and set as visible display below the system project pages in the project navigation pane based on the layout's assigned order. If you select only one project page or layout to be visible, the navigation pane does not display in the project. Once you select a

Field	Description
	second project page or layout to be visible, the navigation pane will display.

5. *(Optional)* In the Assigned Rule column, enter a condition rule to be applied to the layout.
6. *(Optional)* In the Roles column, define any role restrictions to be applied to the layout.
7. *(Optional)* Drag and drop the pages into new locations within the list to customize the order to be displayed on the project page.
8. Click **Apply** to save your changes.
9. Open or create a project that uses the process model to display view how the page layout looks as a project page.

Adding Page Layouts as Accolade Pages

For a page layout to be available as a page in Accolade that is not connected to a project, you must set the page layout to be available as a global link, which disables any project-specific pods from being added to the layout. Pages are automatically added to bottom of the Project menu.

To change the properties and menus for a page layout defined as an Accolade page:

1. From the **Process** menu, select **Configuration > Global Links**.
2. Click the name of the global link to open it for editing.

   Identify layout links by their link name, which starts with /Layout/Layout.
3. Update the information as necessary.

   To make the page layout the first page a user sees when they log into Accolade, select the **Landing** option.
4. Click **Apply** to save your changes, or **Cancel** to exit without saving.

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.
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 #fffff.
Margin Color	Valid hex color code	Can be blank and defaults to color code #fffff.
Page Width	Valid pixel values	Can be blank in which the layout uploads with the default of left aligned.

Column Name	Accepted Values on Upload*	Additional Notes
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.
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.
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.

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

- 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.
Type	AdvancedPlatform Buttons Chart Documents Gates GlobalLinks HTMLReport Metric PlanningView Plugin PortfolioOptimization Productivity ProjectImage ProjectInformation QuickGrids Report ReportGroups TemplateImage Voting	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. Long string metrics with the **Rich Text** check box enabled are not supported in pods and cannot be imported. Can be blank.
Content	Valid pod content name	Do not include spaces between words and the content must be appropriate for the pod **Type**.

Column Name	Accepted Values on Upload*	Additional Notes
		Can be blank.
X	Integer value greater than or equal to 0	Determines where the pod displays horizontally in the layout. Coordinates (0,0) correlate to the top left corner of the layout.
Y	Integer value greater than or equal to 0	Determines where the pod displays vertically in the layout. Coordinates (0,0) correlate to the top left corner of the layout.
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.
Advanced Settings	A valid expression	Applies to pods with advanced settings. 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: {"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"}]} If the expression is invalid, the row does not upload.
Plugin Type	Valid configured plugin name	This setting only applies for pods containing plugins.
Filter To Project	Yes, Y, True, 1, X*	This setting only applies to global link and planning view pods. All other values are treated as **No** on upload.
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 #fffff.

Column Name	Accepted Values on Upload*	Additional Notes
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 #fffff.
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 #fffff.
Vertical Bar color	Valid hex color code	If blank, defaults to color code #054353.
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 #fffff.
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.

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

- 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. 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.

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

Restricting Configuration for Layouts

Restrict who can view and edit layouts by assigning the layout to one or more access groups. Process Designers with matching access group permissions set in their user profile will be able to view or edit the layout.

Note: The access groups that display for selection are based on your access group permissions as defined in your user profile. Additionally, access group settings for the layout must match the user permissions of other Process Designers in order to display for them.

To restrict layout configuration:

1. From the **System** menu, select **Page Design > Layouts**.
2. Do one of the following:
   - **To add a new page layout** - Click **Add New** in the upper right corner of the page and create the layout.
   - **To edit an existing page layout** - Click the name of the layout to open it for editing.
3. In the Layout section under **Configuration Access Groups**, click to select the access group (s) to which this layout belongs.

The access group(s) displayed are based on the current user's access group permissions. Only access group(s) to which you have Edit permissions are selectable. However, parent access group information is visible for access groups to which you have View permission.

The layout is selected to the highest level access group listed by default. Note that the layout is only added to access groups that are checked. It does not propagate to child access groups unless those child groups are checked.

Process Designers with matching access group permissions will be able to navigate to and edit the layout, depending on their individual access group permissions.

4. Click **Apply** to save your changes.
5. Click **Save** or **Save and Close** to save the layout to Accolade.

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